OSOS
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New York State Eligible Training Provider List (ETPL)
OSOS Guide

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BACKGROUND

Mandated by the Workforce Investment Act (WIA), the Eligible Training Provider List contains a statewide list of training providers who qualify to receive Individual Training Account (ITA) funds for their approved programs. An ITA is a voucher given to customers who need training. The ETPL is designed to provide an all-inclusive listing of all available training to the community, regardless of their eligibility for WIA funds. Each Local Workforce Investment Board (LWIB) has the authority to determine what training is listed in the ETPL and eligible for WIA funding as specified in Technical Advisory TA 06-7.

ITA training services must be recorded in OSOS using an appropriate provider and offering from the ETPL unless specifically exempted by a State or Federal program. An appropriate provider in OSOS is identified with an **ETP Auto Load** or **ETP Manual** notations.

The current version of the ETPL was launched February 3, 2011. The website address is https://applications.labor.ny.gov/ETPL/.

ETPL AUTO LOAD INTO OSOS

THE ETPL AUTOLOADED OFFERING

Providers submit on-line ETPL applications for review to their primary LWIB. The primary LWIB is determined by the geographical area in which the training provider's offering is physically located by zip code. Out of State providers may select any LWIB from a drop down menu.

No provider will be listed in the ETPL until at least one offering is listed for that provider.

Only offerings that are determined eligible for WIA funding and have the **Yes, Funding is Eligible** box checked in ETPL, are auto loaded with the training provider's general, contact and service information into OSOS. Training offerings that are determined not eligible for WIA funding by the primary LWIB will not auto load into OSOS.
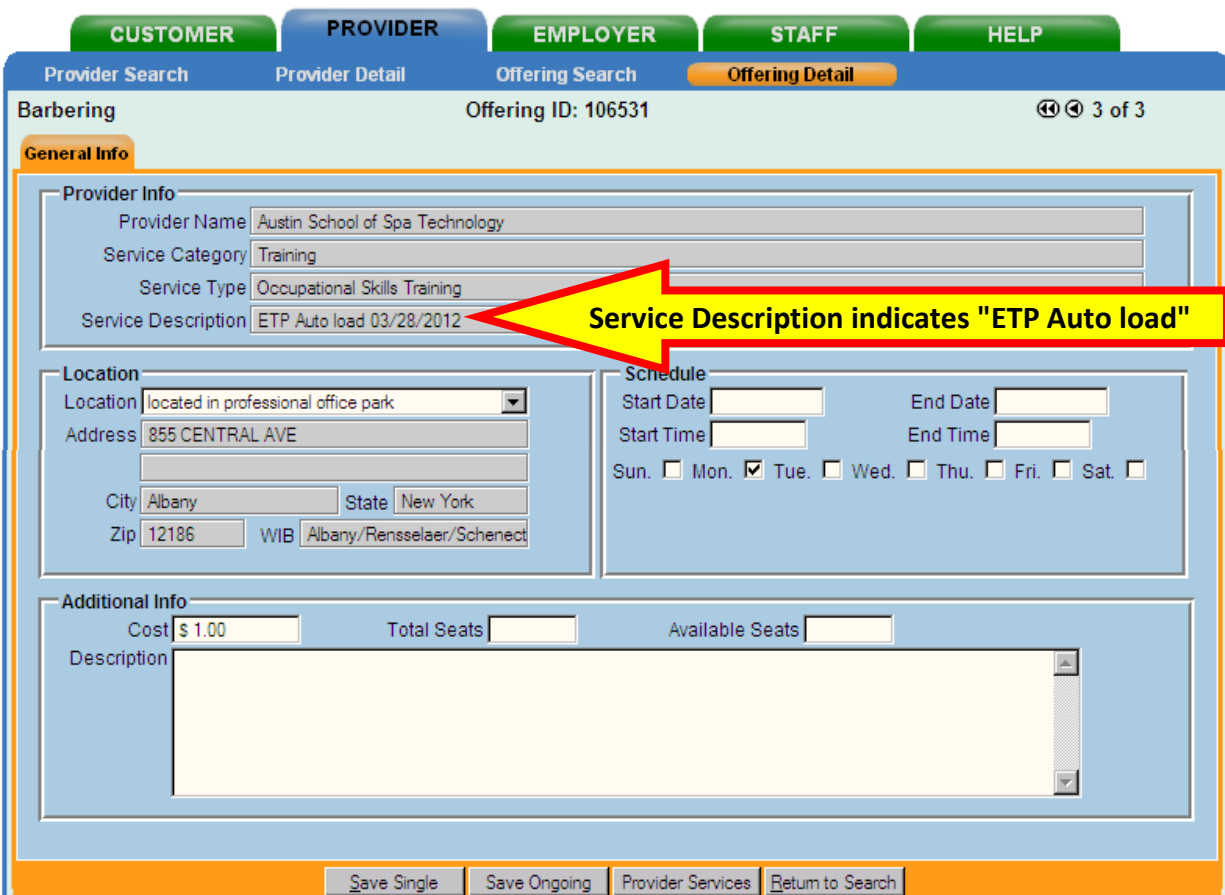

Once approved and determined eligible for WIA funding, the offering is immediately auto loaded into OSOS.

No data will auto load from OSOS into the ETPL.

The following ETPL auto loaded data fields are viewable as "***ETP Auto load"*** followed with the date:

- offering **Service Description**,
- provider contact info **Staff Assigned** ← *DO NOT ALTER THIS DESCRIPTION*.
- provider service **Description**

The ETPL does not populate the offering's **Schedule** data fields. OSOS will default to **Monday**. **Start Dates**, **End Dates**, **Total Seats** and the **Available Seats** fields are not auto loaded and should be left blank to avoid any need to continually create new offerings.
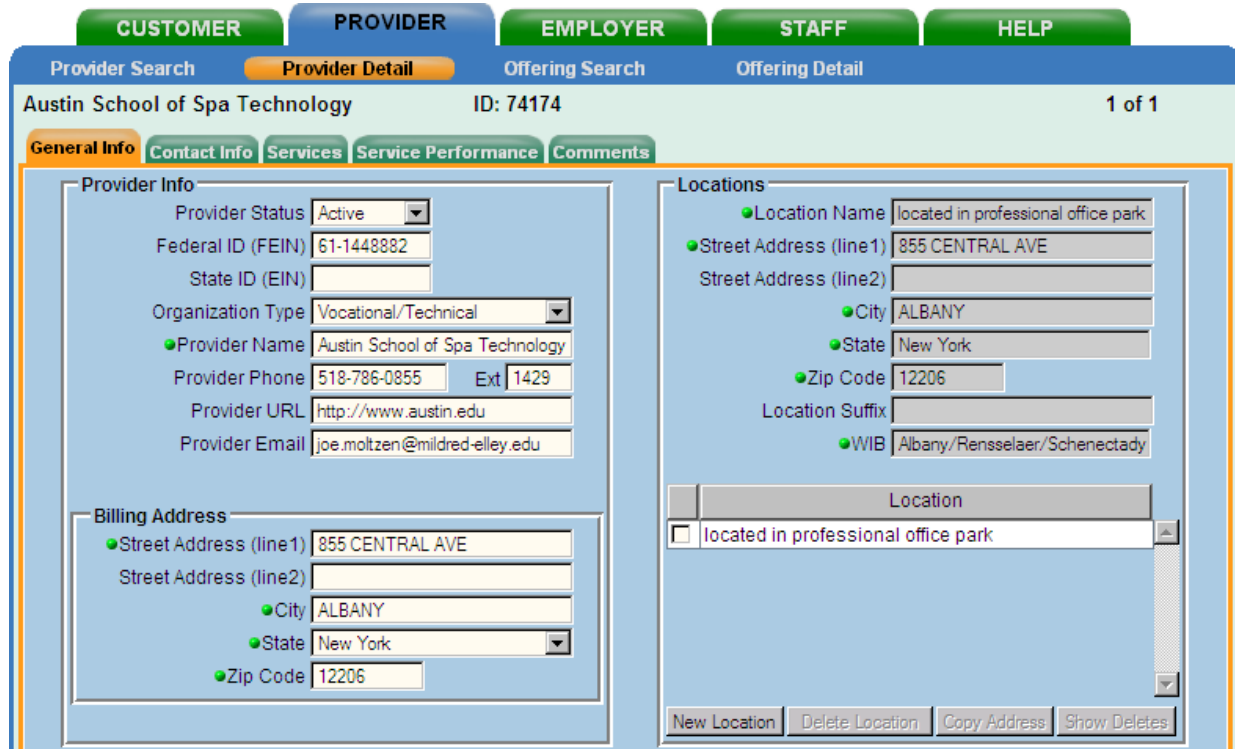
THE ETPL AUTOLOADED PROVIDER

The ETPL will automatically populate the training provider's information in the **General Info, Contact Info** and **Services** tabs.

The provider **Services Description** will be viewable as "*ETP Auto load*" followed with the date the offering was auto loaded into OSOS. *DO NOT ALTER THIS DESCRIPTION*.

Services Description indicates "ETP Auto load"

Category	Service Type	Service Name	Description
Training	Occupational Skills Training	Barbering	ETP Auto load 03/28/2012

REQUESTING MANUAL ENTRY INTO OSOS

Training that is determined not eligible for WIA funding by the primary LWIB will not auto load into OSOS.

Secondary LWIBs that desire a provider or offering be available in OSOS, should contact the primary LWIB to confirm that an on-line application was received and why approval was withheld. Depending upon the primary LWIB's response, the secondary LWIB may ask the primary LWIB to reconsider and approve the offering as **Funding Eligible.**

Lastly, the secondary LWIB may submit a request with the information required to create the provider, provider service and offering to the ETP Help Desk at ETP@labor.ny.gov.

The provider or offering will be manually entered by NYSDOL ETPL staff into OSOS with the notation "**ETP Manual**" followed by the date of entry in the:

- offering **Service Description**,
- provider contact info **Staff Assigned** and   *DO NOT ALTER THESE NOTATIONS*
- provider service **Description** data fields.

New Non-ITA training providers and some special ITA training, along with course offerings must be manually entered directly into OSOS. A **Provider Module Data Entry and Maintenance** user guide is available and the link may be found in the Resources page. The offering's **Schedule** data fields will be intentionally left blank to avoid the need to continually create new offerings.

Do not, under any circumstances, delete or change the Provider information of another LWIB without their consent and cooperation.

CLEANING UP DUPLICATE OFFERINGS, PROVIDER SERVICES AND PROVIDERS

A training provider or course offering that is removed from the ETPL by the LWIB will not be automatically inactivated or deleted in OSOS. The LWIB should change the **Active** status of a provider to **Inactive** or **Deleted** whenever a training provider or course offering is removed from the ETPL and will no longer be available.

Additionally, duplicate training providers and course offerings exist within OSOS with different ID numbers.

- Whenever a customer service has been data entered, that offering, provider service and provider will continue to exist in OSOS and cannot be deleted. The customer is said to be "*attached"* to that offering, provider service and provider.
- When deletion is not possible, then an offering, provider service or provider may be inactivated.
- LWIBs must inactivate or delete any duplicate or obsolete training provider and offering.
- If an LWIB decides to approve a new offering or provider record through the ETPL dashboard, it may be necessary to inactivate or delete a current record that will now become obsolete. *Every effort should be made to complete a thorough search of providers and offerings before approving new submissions from a provider.*
- Special permission is required to delete or inactivate any offering, provider service and provider.

SEARCHING FOR AN OFFERING

Inactivating and deleting requires the user to take sequential action; first with the offering, then the provider service and then the provider.

First, perform a complete search for the offering using one of the following two methods:
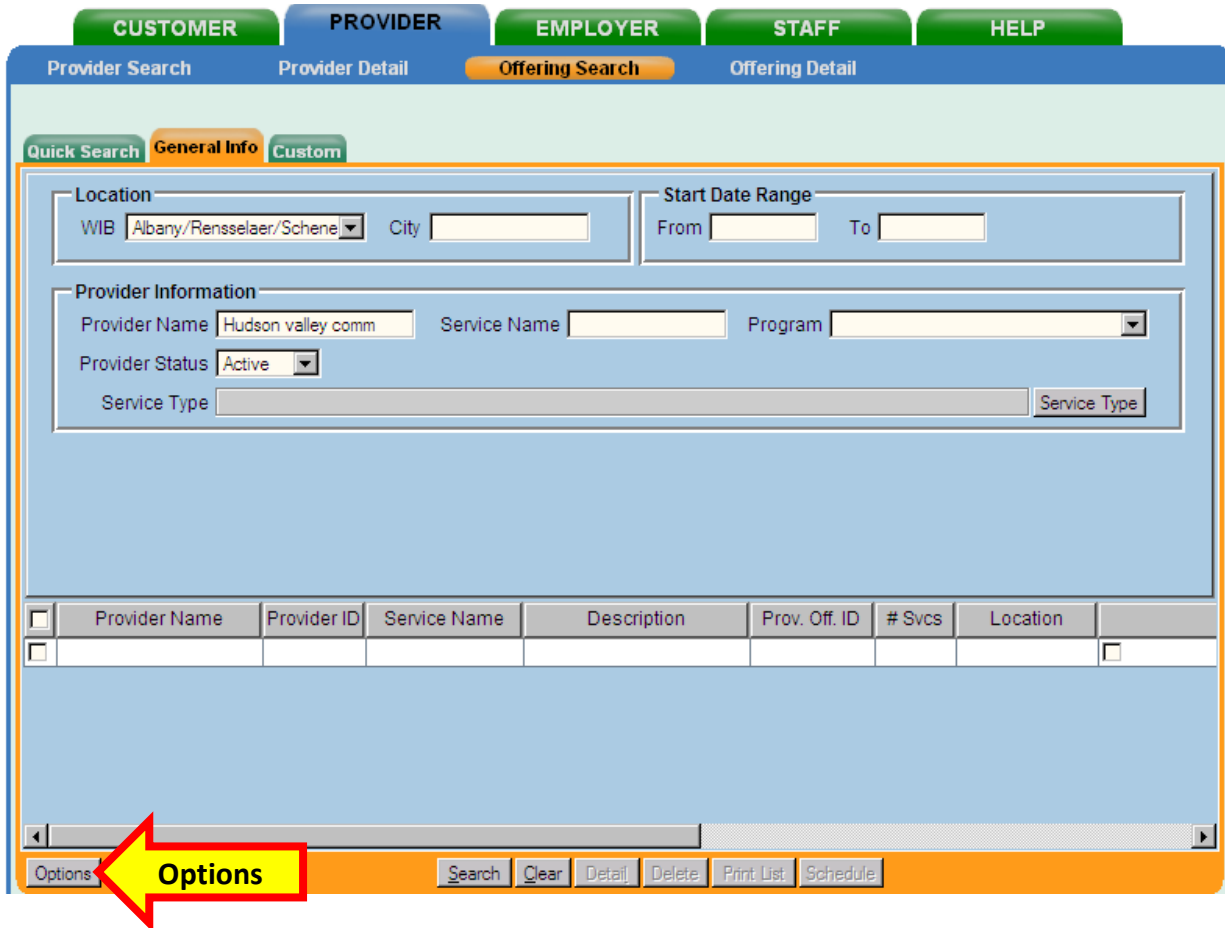
1. When the Offering ID # is known, navigate to the **Provider** module; **Offering Search** window; **Quick Search** tab and enter the ID number or numbers. Then click the **Search** button at the bottom of the screen.
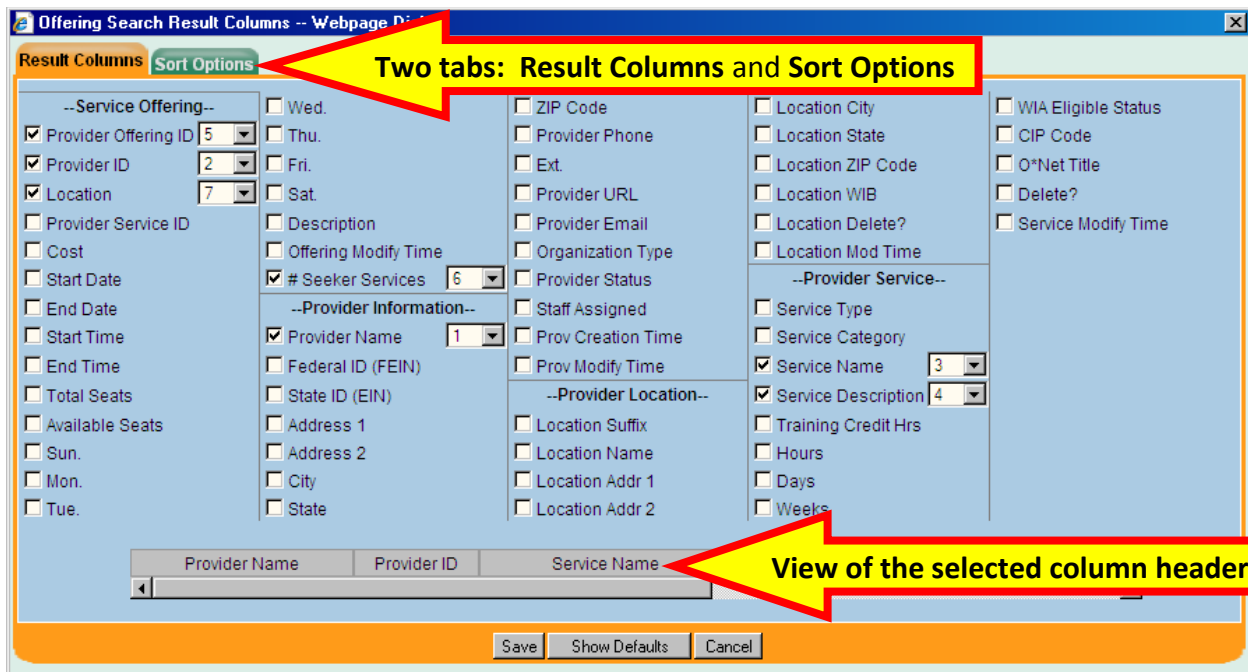
2. When the Offering ID # is not known, navigate to the **Provider** module; **Offering Search** window; **General Info** tab.

- The **LWIB** of the user that logs in to OSOS will automatically be populated. If not correct, then change to the appropriate **LWIB** or the blank space.
- Enter the exact **Provider Name** if known. When the exact name is not known, the first few letters of the **Provider Name** may be entered or it may be left blank.
- Enter the exact **Service Name** if known. When the exact name is not known, the first few letters of the **Service Name** may be entered or it may be left blank.
- Select the **Service Type**, if known.
- Click the **Options** button found in the bottom left hand side of the **General Info** tab.

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- The search result information may be customized by clicking the **Options** button and removing or adding the desired data fields.
- When searching for an offering to be deleted or inactivated, it is recommended to click the **# Seeker Services** and the **Provider ID** data fields.
- The **# Seeker Services** will indicate if any customer has been attached to the offering. If the search result is a zero, then the offering may be deleted. If the number is anything other than a zero, then the offering may be inactivated.
- The **Provider ID** will be used later in the process to search for the **Provider Service** and **Provider**.
- Click the **Save** button to save the search options and automatically navigate back to the **General Info** tab in the **Offering Search** window.

- The search screen will become visible with the customized data fields that were selected from the **Offering Search Result Columns - - Webpage Dialog**.

DELETING AN OFFERING

- Select the check box to highlight the offering to be deleted. Only one offering may be deleted at a time.
- With appropriate OSOS permissions and if no customer is attached to the offering, the **Delete** button will become accessible. The number of customer services indicates if any customer is attached to the offering.
- Click the **Delete** button and then the **Save** button.
- If the **Delete** button is not accessible, follow the directions for inactivating offerings.

DELETING A PROVIDER SERVICE AND PROVIDER

There are two ways to search for the **Provider Service** and **Provider**:

1. The **Provider ID** number may be entered into the **Quick Search** tab when the number of provider services is zero (0).
2. Enter information into the data fields within the **General Info** tab.

Using the **Provider Search ID** number is the easiest and most accurate. The number may be located during the offering search:

Navigate to the **Provider Search** window; **Quick Search** tab and enter the **Provider ID** number.

Click the **Search** button.
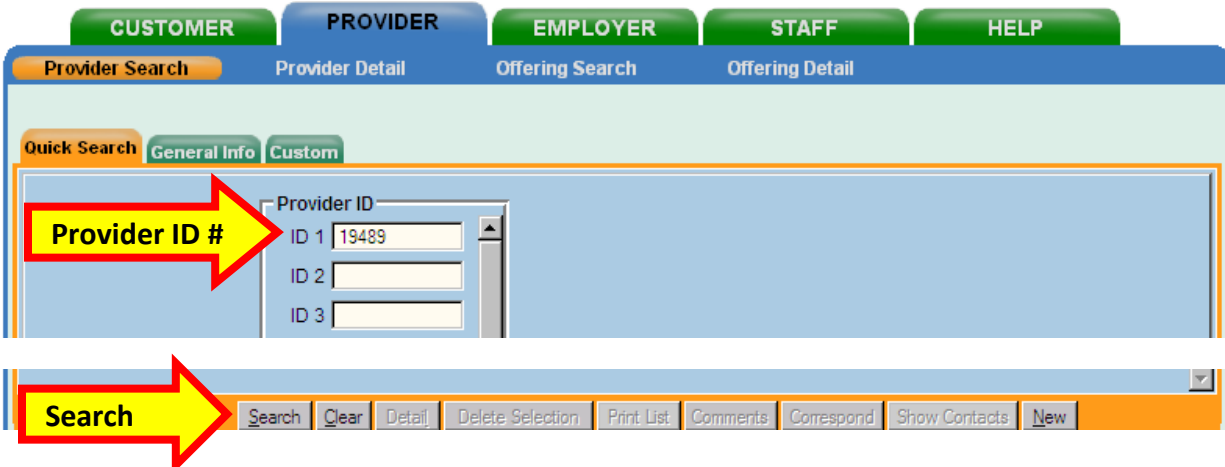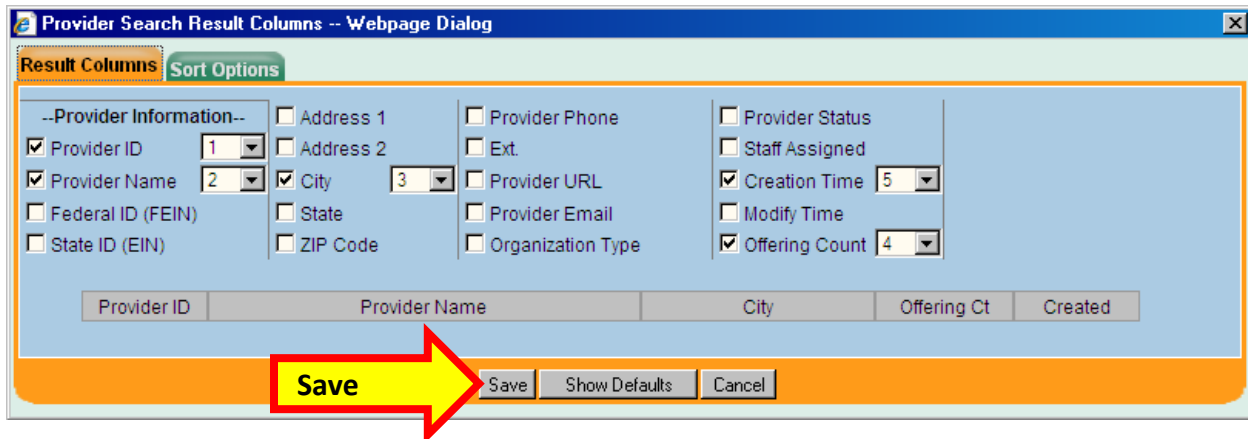
The second method, when no Provider ID is known, requires the use of the **General Info** tab.

- Navigate to the **Provider** module; **Provider Search** window; **General Info** tab.
- Enter the **WIB**.
- Enter the **Provider Name** from the offering that was just deleted.
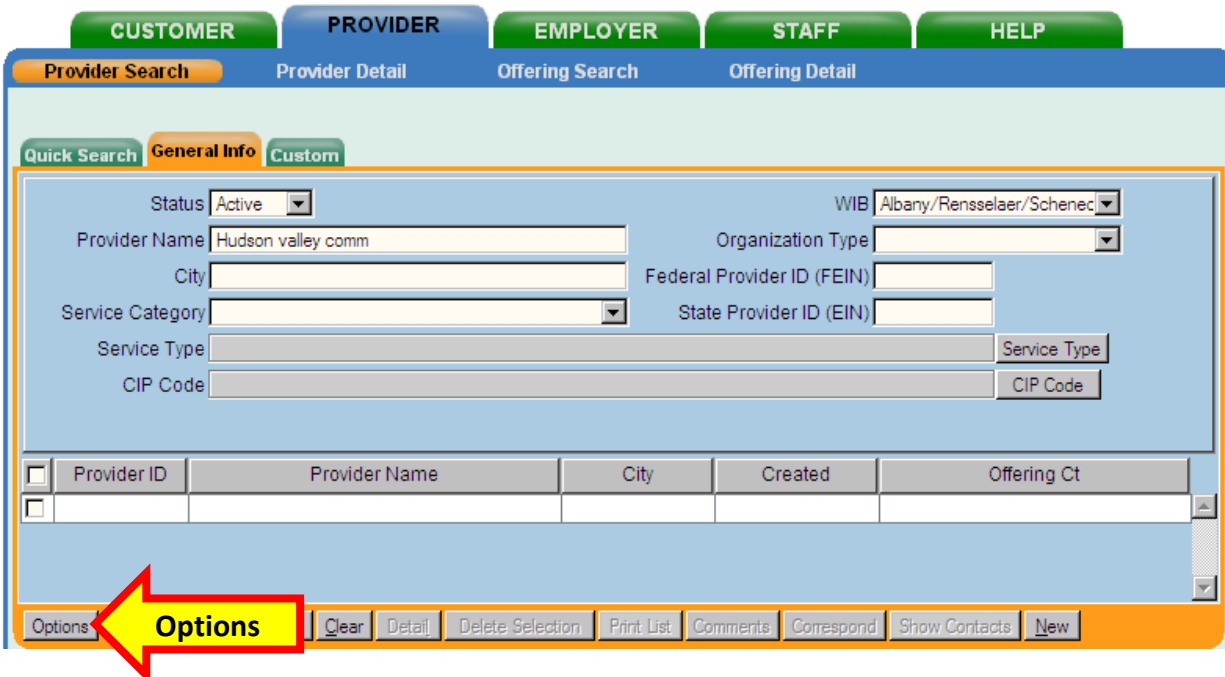
- Click the **Options** button and remove or add the desired data fields.
- It is recommended to include the **Creation Time** and **Offering Count**.

- The **Creation Time** will indicate which **Provider Service** is the most recent. The older duplicate **Provider Service** is usually the one to be deleted.
- The **Offering Count** will indicate if any customer has been attached to the **Provider Service**. If the **Offering Count** is a zero, then the **Provider Service** may be deleted.

- Click the **Save** button.
- Clicking the **Save** button to save the search options and automatically navigate back to the **General Info** tab in the **Provider Search** window.
- Click the **Search** button in the **Provider Search** screen.
- The search screen will become visible with the customized data fields that were selected from the **Provider Search Result Columns - - Webpage Dialog**.

- The Provider may not be directly deleted when the **Delete Selection** button is visible and the offering count is equal to zero. The offering count indicates that there are no customers attached to the provider in any offering or other provider service. All provider services must first be deleted.
- Select the check the box to highlight the provider that is associated with the **Provider Service** that is to be deleted. Only a single provider may be selected at a time.
- Click the **Detail** button to navigate to the Provider record.

- Click the **Services** tab in the **Provider Detail** window.
- With the appropriate OSOS permissions and if the **Offering Count** is zero, the **Delete Service** button will become accessible.
- Click the **Delete Service** button and then the **Save** button.

- If all the **Provider Services** have been deleted, then the **Delete Selection** button will become accessible. Click the **Delete Selection** button to delete the provider record.
- There is no need to click the **Save** button.

DELETING PROVIDER LOCATIONS

To delete a provider location from multiple locations but keep the provider:

- Place a check in the box next to the location to be deleted.
- Click **Delete Location** and then the **Save** button.
- If the **Delete Location** button is grayed out, the location and the provider cannot be deleted and must be inactivated.
- Deleting a provider location requires the user to:
- Place a check in the box next to the location to be deleted.
- Click **Delete Location** and then the **Save** button.
- If the **Delete Location** button is grayed out, the location and the provider cannot be deleted and must be inactivated.
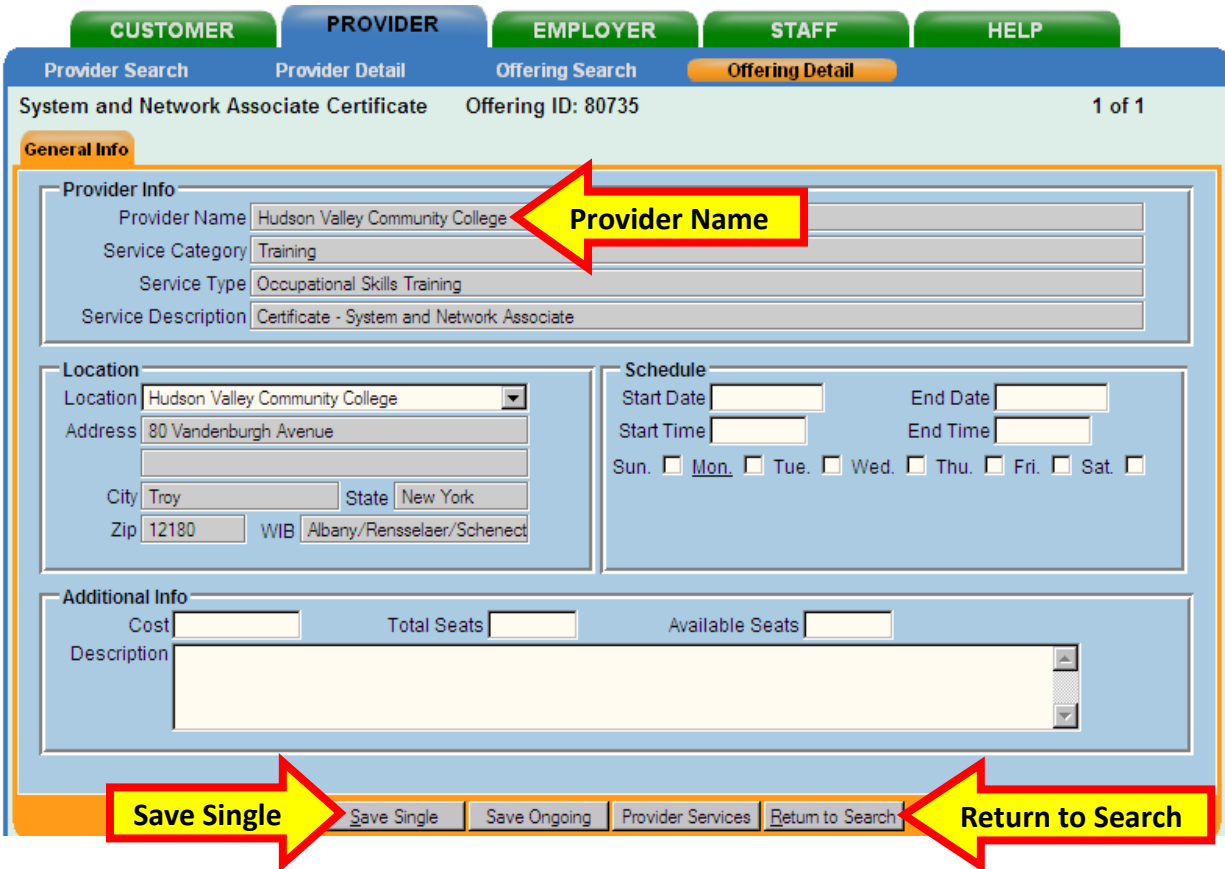
DELETING A PROVIDER

- Select **Deleted** for the **Provider Status**.
- Add "*zzzDNUzzz*" to the beginning of the provider name and click **Save**.
- Click the **Save** button.

INACTIVATING AN OFFERING

- If an **Offering** has a customer attached to it, then the **Offering** cannot be deleted, but may be inactivated.
- Search for the duplicate or obsolete offering as described earlier in this guide.
- Select the check the box to highlight the offering to be inactivated. Only one offering may be inactivated at a time. Click the **Detail** button to navigate to the **Offering Detail** screen.
- In the **Offering Detail** screen, remove any data from the **Start Date**; **End Date**; **Start Time**; **End Time**; **Cost**; **Total Seats**; **Available Seats**; and **Description**.
- Remove all checkmarks from in front of the days of the week.
- Click the **Save Single** button.
- Copy or note the **Provider Name** and **Service Name**. It will be needed to complete the inactivation of the offering.
- Click the **Return to Search** button to return to the offering search results and select the next offering to be inactivated or begin a new search.
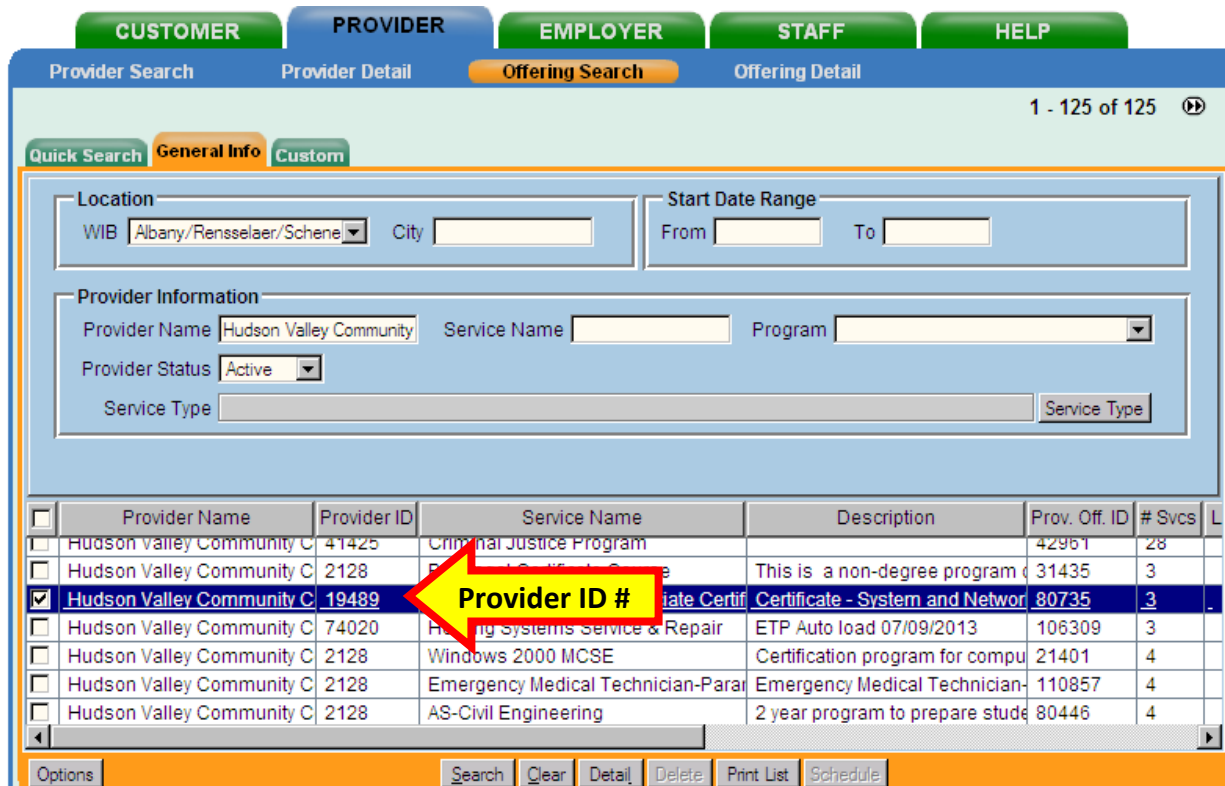
To complete the inactivation of an offering, the provider service must be inactivated.

INACTIVATING A PROVIDER SERVICE

There are two ways to search for the **Provider Service** and **Provider**:

1. Use the **Provider Search ID** number.
2. Enter information into the **General Info** tab data fields.

Using the **Provider Search ID** number is the easiest and most accurate. The number may be located during the offering search:

Enter the **Provider ID** into the **Quick Search** tab in the **Provider Search** window and click the **Search** button to automatically navigate to the **Provider Detail** screen.
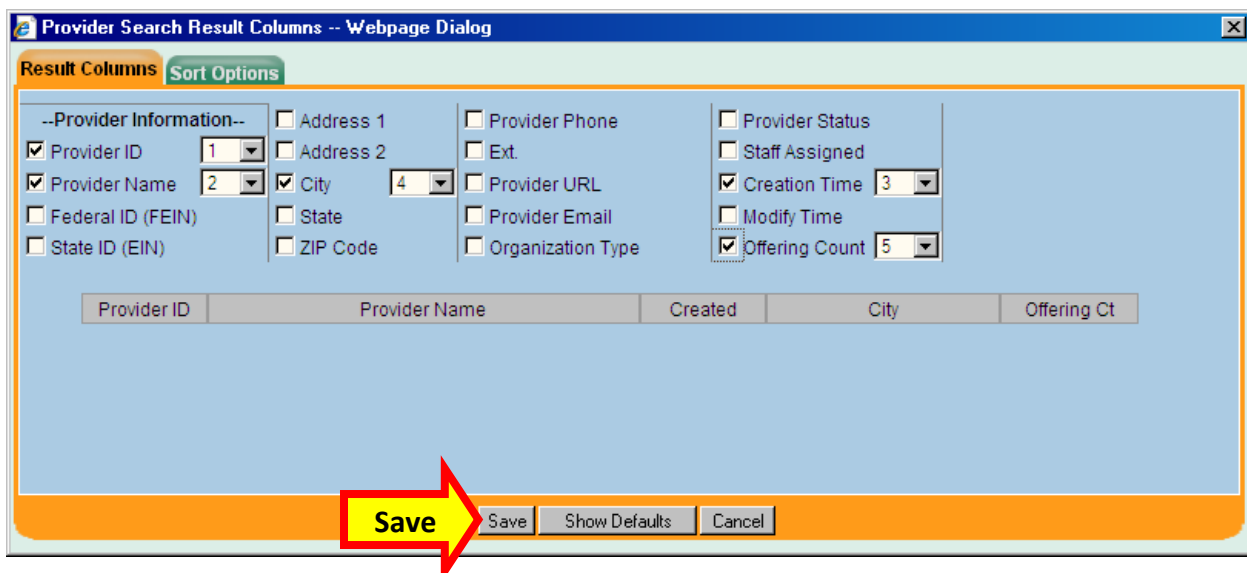
The second method requires use of the **General Info** tab.

- If the **Provider Service** has a customer attached to it, then the **Provider Service** may be inactivated. It may not be deleted.
- Navigate to the **Provider** module; **Provider Search** window; **General Info** tab.
- Data enter or paste the **Provider Name** from the offering that was just inactivated.
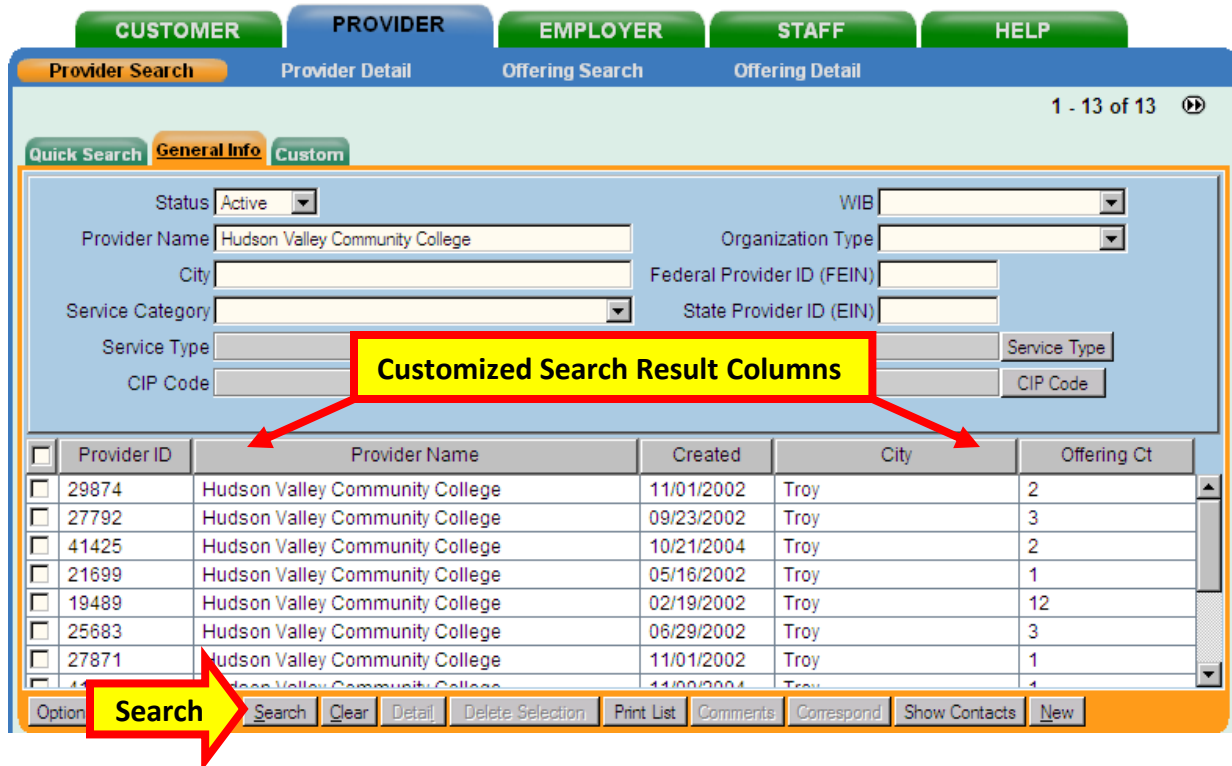
- Click the **Options** button and remove or add the desired data fields.
- It is recommended to include the **Creation Time** and **Offering Count** data fields.
  - The **Creation Time** will indicate which **Provider Service** is the most recent. The older duplicate **Provider Service** is usually the one to be inactivated.
  - The **Offering Count** will indicate if any customer has been attached to the **Provider Service**. If the **Offering Count** is anything other than a zero, then the **Provider Service** may be inactivated.
- Click the **Save** button to save your search options.

- Clicking **Save** will automatically navigate back to the **General Info** tab in the **Provider Search** window.
- Click the **Search** button in the **Provider Search** screen.
- The search screen will become visible with the customized data fields that were selected from the **Provider Search Result Columns - - Webpage Dialog**.
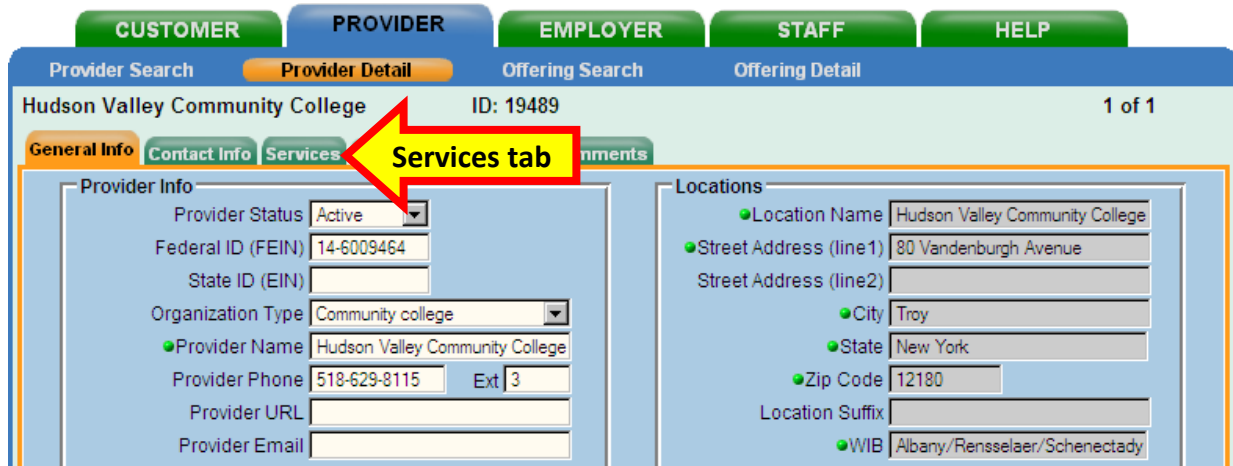

- Select the check the box to highlight the **Provider Name** that is associated with the offering that was inactivated and the **Provider Service** that is to be deleted. Only a single provider may be selected at a time.
- Click the **Detail** button to navigate to the provider record.

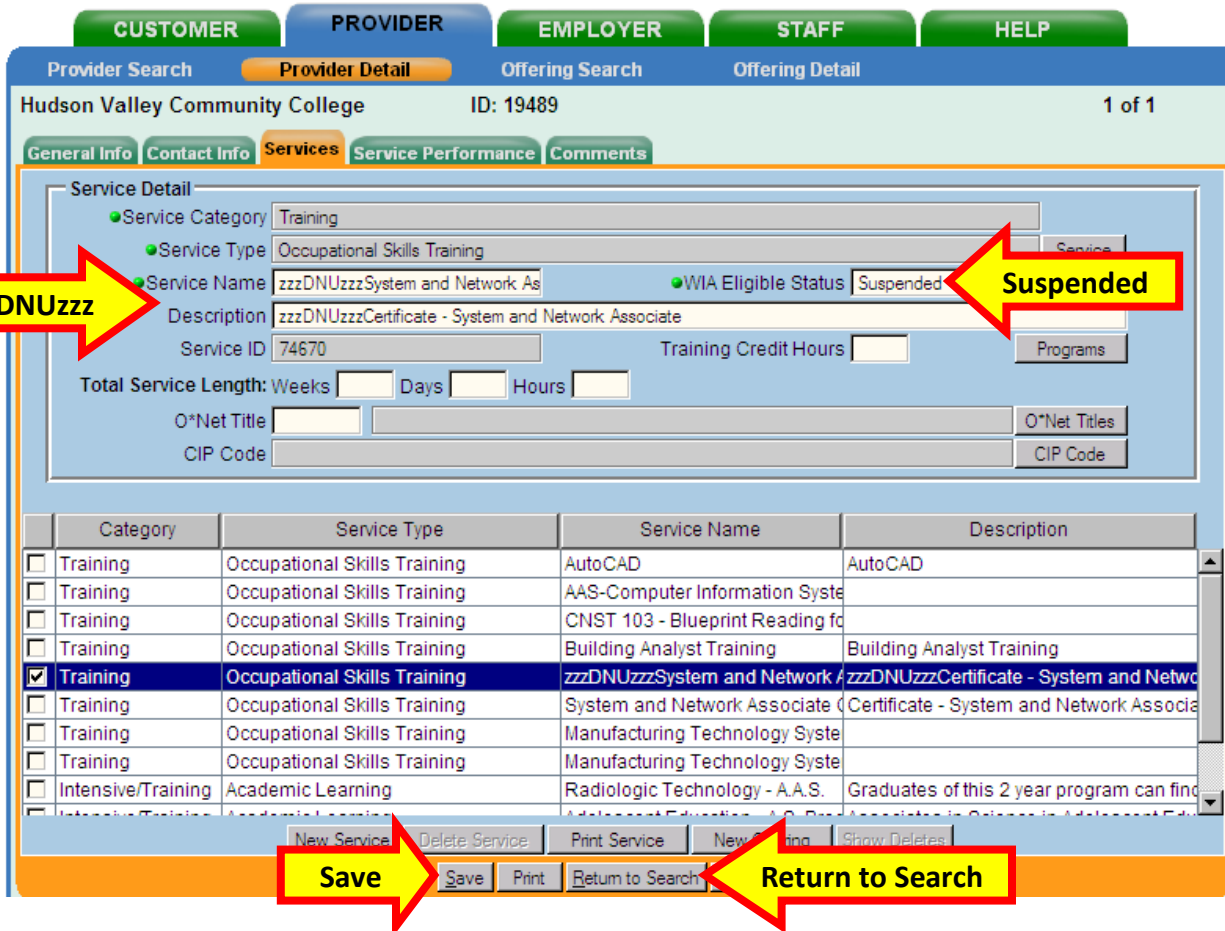- Click the **Services** tab in the **Provider Detail** window.

- Select the check the box to highlight the **Provider Service** that is associated with the offering that was inactivated. Only a single **Provider Service** may be selected at a time.

- Place a "*zzzDNUzzz*" in front of the **Service Name** and the **Description**.
- Change **WIA Eligible Status** to **Suspended**.
- Click the **Save** button.
- Click the **Return to Search** button and select the next offering to be discontinued and repeat the process for all offerings that require inactivation.

INACTIVATING A PROVIDER LOCATION

- Place a check in the box next to the location to be inactivated.
- Add "*zzzDNUzzz*" to the beginning of the **Location Name** and **City**.
- Click **Save**.
- If the **Delete Location** button is not grayed out, the location may be deleted if you have the appropriate permission.

Locations

Location Name	zzzDNUzzzHudson Valley Commu~
Street Address (line1)	80 Vandenburgh Avenue
Street Address (line2)	
City	zzzDNUzzzTroy
State	New York
Zip Code	12180
Location Suffix	
WIB	Albany/Rensselaer/Schenecta

zzzDNUzzz (annotation pointing to Location Name)
zzzDNUzzz (annotation pointing to City)

Location
☑ zzzDNUzzzHudson Valley Community College
☐ Hudson Valley Community College
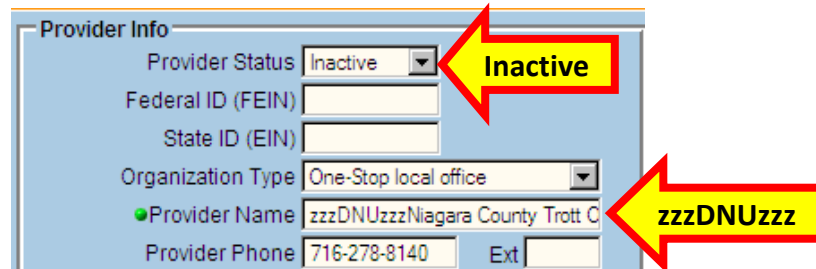
INACTIVATING A TRAINING PROVIDER

- Add "**zzzDNUzzz**" to the beginning of the provider's name and click the **Save** button.
- Change the **Provider Status** to **Inactive** and click the **Save** button.

Changing the **Provider Status** to **Inactive** and then adding "**zzzDNUzzz**" to the beginning of the provider's name will result in an error message.
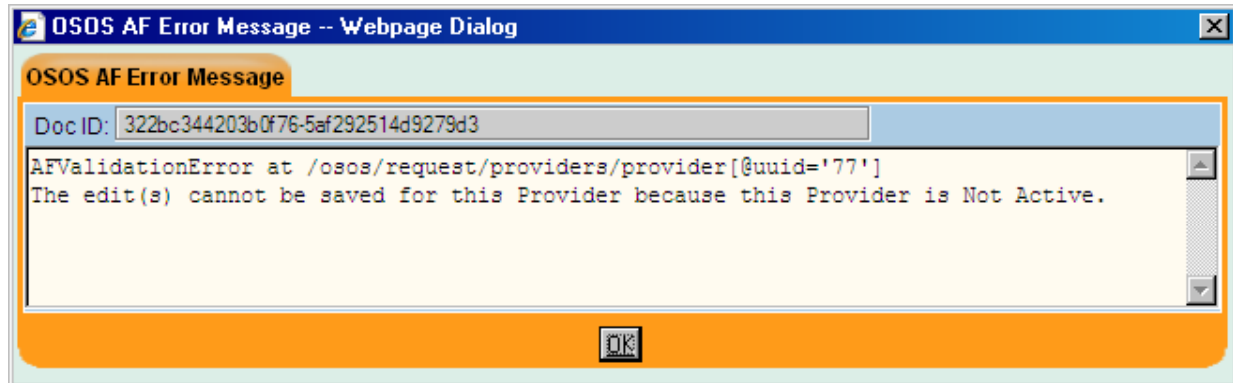
Inactivating a training provider will automatically inactivate the course offerings listed for that provider. It is still necessary to inactivate the offerings individually by adding the "**zzzDNUzzz**" to the **Service Name** and the **Description** in the **Offering Detail General Info** tab.

RESOURCES AND ASSISTANCE

ETPL address: https://applications.labor.ny.gov/ETPL/

Technical Advisory 06-7: http://labor.ny.gov/workforcenypartners/ta/ta06-7.htm

The ETPL OSOS user guide is located at: http://labor.ny.gov/workforcenypartners/osos/osos-guide-etpl.pdf

Additional program information, OSOS guides and other resources can be found at: http://labor.ny.gov/workforcenypartners/tools.shtm

For further assistance with OSOS data entry, please contact the OSOS Help Desk:
By phone: (518) 457-6586
By email: help.osos@labor.ny.gov

The ETPL Training Provider desk guide may be found at http://www.labor.ny.gov/workforcenypartners/PDFs/TrainingProviderGuide.pdf.

Training providers may secure assistance by the "Contact Us" link at the ETPL website.