# Virtual OneStop® Version 19

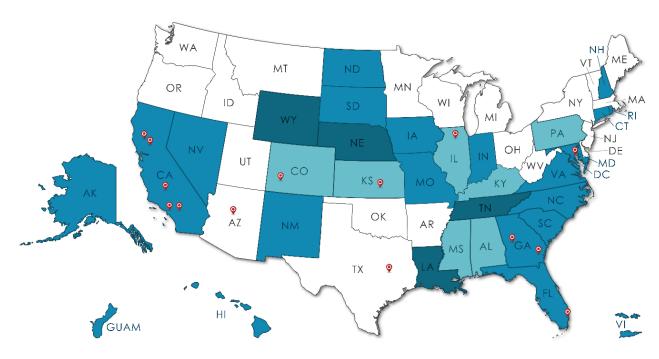
# Provider Services User Guide

(Provider Representatives & Provider Staff)



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Date	Doc Version & Release #	Description
January, 2019	V19 (01-2019)	The first release for version 19 of Virtual OneStop functions for Provider Services, including the new Education and Training Program wizard and tabbed program entry section.

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# 1: Provider Services – Overview & Quick Summary

## **Chapter Contents**

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## **Overview**

WIOA mandates that each state have a system or list for training providers that is the state's Eligible Training Provider List (ETPL). This is so that consumers can research career and training options suitable to their interests. The ETPL is also used to ensure that WIOA participants are enrolled in WIOA-certified ETPL programs/courses. The ETPL needs to be continuously updated to provide accurate information on currently approved eligible programs of postsecondary institutions. When One Stop WIOA case managers enroll their WIOA program participants in needed training programs, they must use approved training providers and certified programs/courses from the state's ETPL system.

In Virtual OneStop, Provider Services meets the state's ETPL needs by providing services for two types of users: Provider Users (who represent and work for a training provider institution), and Provider Staff (who are connected and work for state One Stops).

The Provider Services User Guide is designed and organized for assisting these two types of users:

**Provider Users** – The are users who represent the training provider institution, and who will manage the institution's programs/courses and services, and apply for WIOA certification.

Provider users (sometimes referred to as Provider Representatives) can register in the system, and associate themselves with an existing institution, or enter their institution, as part of their registration. Once staff approve them, check their association with an active, institution, and enable their access, the Provider User can define programs and services for the institution, and submit them for certification.

Provider Staff – These are staff members in Virtual OneStop who can create or assist the provider users, or they can directly create or manage the provider institution. Only Provider Staff can perform the review and WIOA certification of programs/courses.

A staff member's capabilities is controlled by their Admin privileges, as well as any configuration options for your site (see Chapter 5, Staff Provider Access).

With full permissions, provider staff can: create a provider institution and provider user, manage their information, set up or manage programs for the provider, review occupations that are identified as state high demand in provider listings (by administrators), enable or disable provider users,



**Menus for Users & Staff** – both can maintain programs. Only staff can certify providers and programs.

approve WIOA applications, certify programs and providers, and review and certify reapplications.

The purpose of this user guide is to supply both provider users and provider staff with detailed instructions on how to use the functions available to them. The guide is organized by chapters for Providers Users (chapters 2 to 4), followed by chapters for Provider Staff (chapters 5 to 13). The



chapters include detailed step-by-step procedures and graphics. Below are quick summaries of the most frequently-used functions for each user type.

## Provider Users – Quick Reference Summary

Some common functions/tasks performed by provider users are briefly summarized below (with the menu option or path in parenthesis).

## Register as Provider User (Register > Provider)

Provider Users must register in the system before they can create or manage programs, or submit programs for WIOA eligibility. If they are registering for a new institution, they may also be able to create the base data for the institution, as the second and third page of their registration, depending on system settings.





For details, see the topic, Registration, in chapter 2.

Staff must enable both provider users and their associated provider institution before the provider user can create programs and apply for WIOA certification.

## Add Programs/Courses (Manage Institution Programs)

Once staff enables a provider user, they can add programs by clicking an Add Education or Training Program button at the bottom of the Education & Training (E&T) Programs screen. This launches an

E&T Program wizard, which guides provider users through required data entry in the 16 tabs of an E&T Program.

The tabs are organized to help the user add all needed details, including course data, curriculum, scheduling and duration data, program-related occupations, cost, locations, skills, completion expectations, and performance data.





Tabs initially display as segments of a progress bar, and turn green as you complete them. If you leave the program and return, segments will show as tabs.



For details, see the topic, Adding a New Program, in chapter 3.

## Apply for WIOA Program Certification (Manage Institution Programs)

The Confirmation tab is the last tab in which a Provider User makes entries to add or edit programs. They must click a Yes button to agree to a confirmation statement, and check a box to submit program entries.

Clicking the **Next** button (at the bottom of the tab) submits the program for review and WIOA approval.

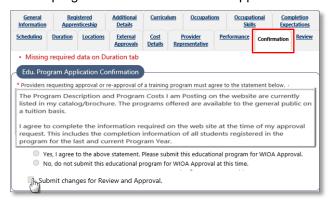
The user will see a Review tab next, with a Pending status (the tab is view-only for the Provider User).



For details, see the topic, *Confirmation Tab – for* WIOA Application Approval, in chapter 3.

If required data was missed on previous tabs, messages in red will identify the tabs with the missing required data (as shown at right for a missing Duration record).

WIOA certification is only for Institutions identified as state in the original institution setup. Local institutions have a minimal "Submit Education Program for Review and Approval" statement on this tab.





## Reapply for WIOA Program Certification (Manage Institution Programs)

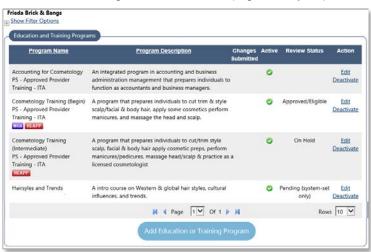
All WIOA-eligible courses must be reviewed and re-certified at regular time intervals (e.g., each year).

Provider Users will see a REAPP icon on the E&T Programs list when a program nears its reapplication date (e.g., within 30 days of reapplication), or when it has passed the date and is not recertified.

The Provider User must click the <u>Edit</u> link and review each of the tabs in the program wizard (for any needed changes). Then they will once again click **Yes** on the Confirmation tab to agree to the statement, check the box (for any changes), and click the **Next** button, to reapply for WIOA approval and certification.



For details, see the topic, *Program Reapplication Confirmation*, in chapter 3.



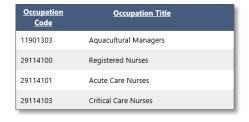
**Note:** REAPP will continue to display for programs after the Provider User confirms reapplication, until staff approves and recertifies the application, and a new Reapplication date is assigned.

## View State High Demand Occupations (Demand Occupations)

Only appropriate administrators can set state-level High Demand occupations (through the admin site), but Provider Users can view all occupations that are defined as High Demand or Bright Outlook at the state level.



For details, see the topic, *View Demand Occupations*, in chapter 3.



## View Institution and Program Reports (View Reports)

Provider Users can generate two types of reports: *Institution Detail* reports display basic provider profile data in a report format. *Program* reports can be generated by status (e.g., pending approval, WIOA approved, in review, by dates, and by other search criteria) and display basic information on the provider's programs.



For details, see the topic, View Reports (for Provider Users), in chapter 3.

**Note:** The Provider Users can only generate these reports for their own institution and its programs. Staff can generate similar reports for multiple providers, programs, or areas.

## Reviewing Other Provider's Services (Educational Services)

Provider Users can access the same Education Services components that individuals and employers can access in Virtual OneStop. This ability is available to all user types and lets them see WIOA-eligible training providers and services.



For details, see the topic, Education Services, in chapter 3.

### View Training Videos (Other Services → Learning Center)

Provider Users can watch several courses, as recorded videos, to help them review some of the basic functions covered in this guide.



For details, see the topic, Learning Center (Provider Courses), in chapter 4.

**Note:** Some states may turn off these Training Video. It is an optional configuration for each state.



## Provider Staff - Quick Reference Summary

Some common functions/tasks performed by provider staff are briefly summarized below (with the menu option or path in parentheses).

## Create a Provider (Manage Providers ➤ Create a Provider)

A provider institution must be created before it can be enabled/activated by staff, and then tied to a provider user (part of enabling the representative). Unless a Provider User creates their institution's basic data, as part of their registration, staff will need to create the provider institution before they manage the provider's services and programs.

When staff selects the **Create a Provider** option, the first of two screen screens displays for entering data for the Provider Institution (show at right).

The first two fields (**Status** and **LWIA Region**) will default to *Active* and to *State*. (If a Provider User registers their own institution, these fields are disabled and staff must check them to activate the institution.)



For details, see the topic, *Create a Provider (Institution)*, in chapter 6.

## Create a Provider User (Manage Providers ➤ Create a Provider User)

Provider Users (sometime called *Representatives*) must register in the system, and be enabled by staff, before they can enter any programs/courses, or submit them for WIOA eligibility and certification. Although Provider Users normally register themselves, staff can perform the registration for them. There is no difference in the registration screen when staff create the Provider User. However, along with a Welcome message, staff will also see a Currently Managing menu group, at the top of the left menu.

If staff selects **Assist a Provider User** from this menu group, the General Search Criteria will display for provider users. This lets staff skip some steps to search for the added provider user, and open the Provider User Access Rights screen for them.

**Note:** Since provider users normally register themselves, this option is at the bottom of the Manage Providers menu. Depending on your state's configuration, you may not see the option.



For details, see the topic, *Staff Registering a Provider User*, in chapter 12.

# Activate a Provider (Manage Providers > Assist a Provider > General Info Tab)

Both new institutions and new provider users must be activated and enabled by staff before the provider user can create programs and apply for approval.

To activate a provider institution, staff can:

- Select Assist a Provider, and use displayed search criteria to find the institution (e.g., search for *Inactive* status).
- Select the General tab in their Provider Profile.
- Click the <u>Edit Provider Details</u> link at the bottom of the Provider Details section.





Access Status:

Institution Name

Username:

First Name:

Last Name

Email: Primary Phone: Pending Access

UNKNOWN PROVIDER

Release Provider User

Assist a Provider User



- Change the status from *Inactive* to *Active* at the top of the section.
- Click the Save button.



For details, see the topic, Activating a Provider Institution, in chapter 7.

**Note:** Staff can move to the provider programs tabs to manage programs, or return to these tabs through Assist a Provider, at any time.

## Enable a Provider User (Manage Providers ▶ Assist a Provider ▶ Find Provider User ▶ Access)

Staff can also enable the Provider Users by identifying them through search criteria (e.g., the User Access Status field: inactive, pending access, under review). They can then click an Edit link and access the Provider User Access Rights screen to identify institution and/or change the access rights.

To enable a Provider User's access, staff can:

- Select Assist a Provider.
- Select the **Provider Users** radio button to change to Provider User Criteria.
- Use search criteria to find the user (e.g., Access Status of *Pending Access* and a partial Institution
- Click an Access link for the Provider User in search results. This displays Provider User Access Rights.
- Click the **Search for Institution** link to display possible institutions, and select the institution to be linked to this provider user.
- Change the Access Rights to Active.
- Enter applicable comments.
- Click the Save button.



For details, see the topic, Enabling a Provider User's Access, in chapter 7.

## Add Programs/Courses (Manage Providers ➤ Assist a Provider ➤ Programs ➤ E&T Tab

Staff adds programs using the same Program wizard as Provider Users. When staff assists a provider, they see the Provider Programs folder. From that folder, staff can select the Education and Training Programs (or E&T) tab. □ Provider Activities

Staff starts to add a program by clicking the Add Education or Training Program button.

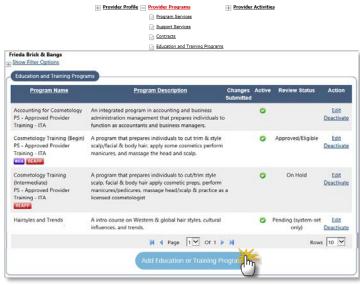
This launches the E&T Program wizard, and guides staff through required data entry in the 16 tabs of a program.

These tabs are organized identically for staff and for provider users, except that staff can also make changes to fields on the last Review tab (e.g., manage the review status to approve, deny, or change the WIOA eligibility).



For details, see the topic, Adding a New Program (as Staff), in chapter 8.

Tabs initially display as seaments of a progress bar, when staff adds







new programs. They turn green as staff completes them, and change to tabs if staff leaves the wizard and returns.

## Approve Programs for WIOA (Manage Providers ➤ Assist a Provider ➤ Programs ➤ E&T Tab)

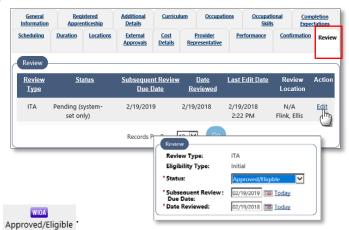
Staff can use the E&T Program wizard to move through all tabs and enter new programs (as indicated above). The can also use the wizard to review the program and approve it for WIOA eligibility using the last tab. The Review tab is the last tab in which a Provider User

makes entries to add or edit programs.

To approve the program as WIOA Eligible:

- Select the Review tab (for the program submitted for Review and Approval).
- Click the Edit link (for the Review record shown with a Pending status).
- In the Review section of the displayed screen, select Approved/Eligible for the status (as well as the Subsequent Review Due Date, and the Date Reviewed).
- Click Save.

The Review tab redisplays with the status





For details, see the topic, Application Confirmation and Approval (WIOA Eligibility), in chapter 8.

Staff can receive system alerts for added programs, or run reports to identify programs due for WIOA application review. They can review all tabs and details via the E&T Programs wizard, and adjust the review status, to approve, deny, or change the program's WIOA eligibility.

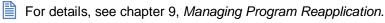
## Approve WIOA Program Reapplication (Manage Providers > Manage Program Reapplication)

The Subsequent Review Due Date that entered at WIOA Approval (shown above) indicates when the

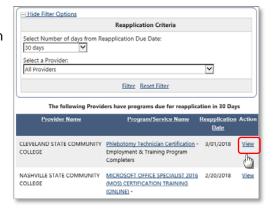
reapplication of the WIOA programs is required (i.e., one year after initial eligibility). Staff can quickly view a list of all programs which are nearing their required WIOA reapplication due date (e.g., less than 30 days from due date). They can then open any program in the list to go directly to the review area, review the program, and make changes to the Reapplication Status (e.g., Approved) and the Eligibility Type (Continued Eligibility).

To view the programs due for reapplication and change their status:

- Select the Manage Program Reapplication option. A list of programs due for reapplication is displayed. (Due within 30 days is the initial default.)
- Click the View link for a program in the list to open its details. From the Program tabs, select the last Review tab.
- Make changes to the Reapplication Status (e.g., Approved), as well as to the Eligibility Type (e.g., Continued Eligibility), as needed.
- Click Save. The reapplication changes are saved, and the Reapplication List screen is redisplayed.



The list of programs due within 30 days is a default value in the filter. Staff can change the value to 45, 60, 75, or 90 days, or Expired.



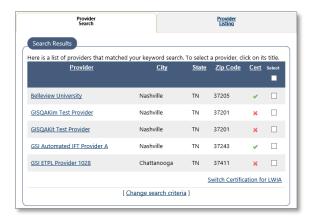


## Certify Providers for WIOA Eligibility (locally) (Manage Providers ▶ Provider Certification)

For customers who have this option, appropriate local staff (not state staff) can use the option to *opt in*, or *opt out* of including certified providers, who have WIOA-eligible programs, to be eligible at their local level.

This is also referred to as the *opting in* option, since it lets a staff member identify a provider, and then *opt in* to identify that provider's WIOA-eligible programs as programs certified for staff use (for enrollment selection) based on specific LWIA levels.

**Note:** This feature is only available for sites with the Opt In/Opt Out configuration, and for local staff with the associate permissions.





For details, see chapter 10, *Provider Certification (Opt In/Out)*, and chapter 11, *Program Certification (Opt In/Out)*.



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## 2: Provider User: Initial Access

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The Provider Services system allows provider users (i.e., an institution's designated provider representatives for managing programs), to self-register. When they first register, the system will allow them limited access while a staff verification process takes place. However, once a staff member has reviewed their information and approved them, the provider user can conduct a larger range of tasks without staff input, including managing the institution's programs.

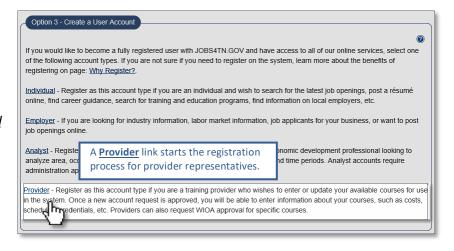


The Not Registered? Link on a typical Home Page Screen

## Registration

New provider users can register in Virtual OneStop by following the same pathway that employers and individuals use to register. On the site's main screen, there is a *Not Registered* link. Providers must first click that link to proceed with registration. The link should appear similar to the following examples.

Potential provider users (i.e., provider representatives) must identify themselves as



providers, and register as such, to access the system. Systems that allow provider self-registration will offer <u>Provider</u> as the last link, under **Option 3 – Create a User Account**. This lets new provider users register to manage their institution's programs and other account information (once staff verify their registration).

- From the Home Page, select the "Not Registered Yet?" link.
   A screen will appear for selecting the provider user account to create.
- Select the <u>Provider</u> link. A Provider User Registration Form is displayed.



A Training Video for the "Registration Process" is also available." See the topic, Learning Center (Provider Courses) in chapter 4.



## Registering as a Provider User

Depending on system configuration, you may be allowed to also create a new account for your institution,

at the end of registering as a Provider User. If so, the two options shown below appear first. You can:

1 Choose to be added to an existing institution (which staff will link you to when they verify you).

2 Choose to register and then also add data



for your institution (which staff will also enable before verifying and activating you as a provider user). If this selection is chosen, additional provider institution details will display after you complete the standard registration.

## To register as a provider user:

When the Provider User Registration Form is displayed (as shown below), enter the required information (as indicated by a red asterisk \*) and any useful optional data. Potential Provider Users are asked the following questions:

- 1 Create a unique User Name that falls within the guidelines noted in the blue text.
- 2 Create a Password that falls within specific guidelines as noted in blue text next to the field.



Provider User Registration Form (top)

**Note:** Remember your User Name and Password; both are needed to access the system.

- 3 Confirm the Password by typing it again in the textbox.
- 4 Choose a Security Question from a list provided in the drop-down box.
- 5 Enter a Security Question Response in the textbox provided. This will be important to remember in case the User Name, Password, or both are forgotten.
- 6 Enter a Federal Employer ID or Social Security Number in the textbox provided.



Note: If you are affiliating with an existing institution, the FEID number may be duplicative; if not (if you picked option 2), then the number must be unique (not already in the system).

- Enter the Institution Name.
- If you, as the provider user who is registering, are associated with an existing institution, enter the Institution Code/BPA # (if known).
- Enter the Primary Location's address in the *Institution Primary Location* fields.
- 10 Enter the provider user's title, name, and contact information in the Contact Information section.
- 11 Click the **Save** button to save the registration form.

If you chose option 1, to be added to an **existing institution's account**, you have gone as far as you can as a provider user, in registering. You will see a Welcome message. It informs you that your access request will be reviewed. It also includes a link or information for contacts, if you have any questions.



If you chose option 2, to also add a new provider institution, then instead of seeing the Welcome screen you will see a second Add a New Provider screen. See the next topic for details on entering the Provider Information to create the general definition of the provider institution.

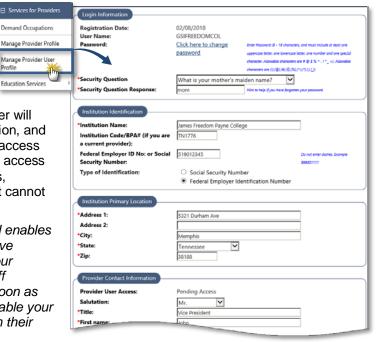
Demand Occupations

After registration (and before being enabled by staff), the provider user can access a few sections of the system. including the Manage Provider User Profile link and the Education Services link. The Provider User Profile link contains basic information entered

during the registration process. The provider will have the opportunity to review this information, and edit as necessary. Provider users can also access the Education Services link, which provides access to educational institutions and courses. It is, however, a directory available to anyone. It cannot be edited.



Until staff verifies your information and enables your provider user registration, you have limited access. You cannot manage your institution's programs or services. Staff receives an automatic notification, as soon as the registration is complete, and will enable your registration within a few days (based on their review procedures).



(Manage Provider User Profile)

If you have not been enabled within a reasonable period, you can use the Communication Center or the Assistance Center to email a request or comment regarding your access.

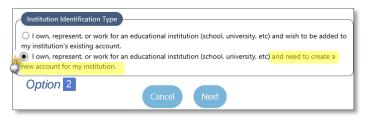


For more information about registering as a provider user, you can also access training videos in the Learning Center, as indicated in the topic "Learning Center (Provider Courses)" in chapter 4 - Provider User: Other Services.



## Creating the Institution (as a Registering Provider User)

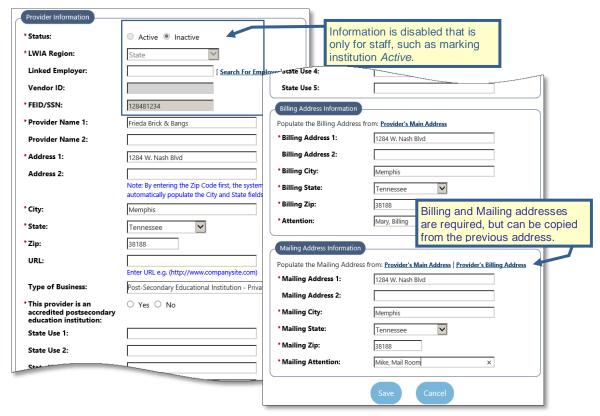
As indicated in the previous topic, if the provider user selects option 2 as they start registration, then after they complete the first page, they will continue through two additional pages to also create the new account for their institution. Then the provider user will see the General Tab at the end of their registration.



#### ▶ To Create the Provider Institution:

When the Provider Information screen displays (at the end of registration), the provider user will see areas for the Provider Information, already filled, the Billing Address, and the Mailing Address.

- Review and adjust data on the Provider Information screen.
  - Review the fields in the Provider Information area (and make changes if needed).
  - Enter a billing address and mailing address (using links or manual entry).
  - Enter an individual for contact in the Attention field, for both addresses.



Sample Base Provider Information Screen

Note: This is the same screen that staff will start with if they create the provider institution, except that:
1) Some of the information will be prefilled for the provider user based on their registration data,
2) The provider user will not go any further than this (and the following CRS Provider Info screen) in registration. Staff can continue to define the details of the provider type data, and approve/enable the institution, as part of creation.

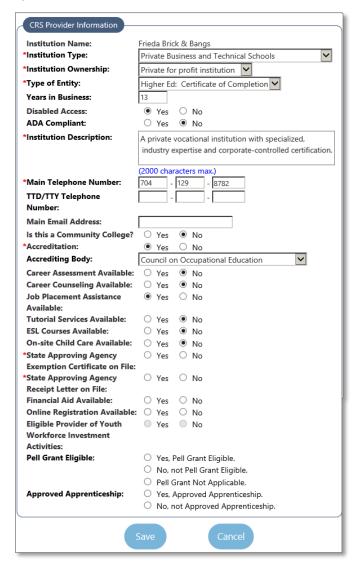
Click Save.



The CRS Provider Information screen is displayed, next. This data is part of the Provider Profile, General tab. It contains more information that will be needed before staff can mark a provider as active, and therefore should be filled in by the provider user, if known.

Review and answer the questions and prompts, as accurately as possible.

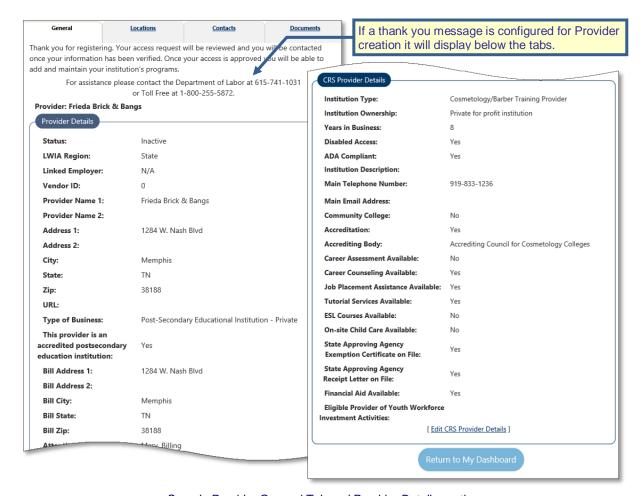
**Note:** Some specific prompts may be required, such as Accreditation, which you may not know. If you click No, staff can change this to Yes later, when accreditation has been added, or when the information is known. (Several Yes/No selections are pre-filled. Several near the bottom are not. If these include required Yes/No selections and you are not sure, select No).



CRS Provider Information Screen

When you are done, Click the Save button.





Sample Provider General Tab and Provider Details sections

The General tab is displayed with the information that you saved for the Provider Details and the CRS Provide Details.

Note: The left navigation access will remain limited until staff review and Activates your user account.

## My Provider Workspace (& My Dashboard)

Once a provider user is enabled by staff, the *My Provider Workspace* menu will display (at the top of the left Navigation pane) with several options. These are quick links to options that are also accessible through the links at the top of the main screen. The menu options/links let individuals quickly access commonly used provider services.

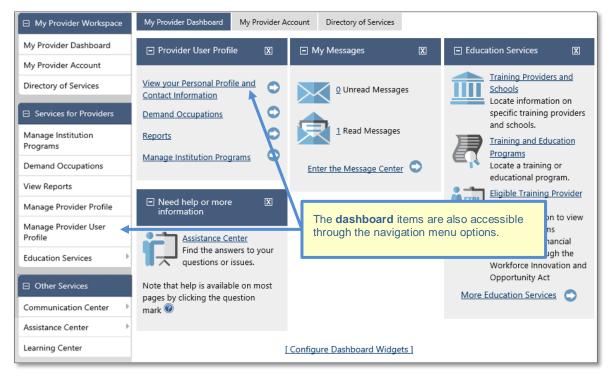
- **My Provider Dashboard** The dashboard, initially displayed at logon, lets you quickly view information through widgets (e.g., new messages, user profiles, institution programs). Dashboard widgets are added periodically, and may eventually include widgets indicating specific program information to identify programs that require your attention. Currently the dashboard widgets are alternate paths to options also available through the left navigation menu.
- **Services for Provider** This menu group (also called the directory of services) is the main menu group. It includes the options for changing your user profile, managing your Provider Institution's profile, and adding, changing, managing, or submitting programs for the institution.



 Other Services – This menu group lets you use system mail to see notifications and messages form staff, see assistance tools, and use the learning center to access videos that may help you manage provider institutions and programs.

**Note:** Currently the Dashboard widgets can be used mainly as a quick method to access services and information, as an alternate method to left navigation menu options.

Additional widgets are being planned to identify data unique to your institution (e.g., the number of programs pending WIOA review/certification, or due for reapplication) which will allow you to quickly access the programs or services that are most in need of attention and updates.



Provider User Registration Form (top)



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## 3: Provider User: Services for Providers

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When Provider users first log in, they see the Dashboard (under the My Provider Workspace menu group on the left navigation menu). The Provider Services menu groups displays the menu options they will use to manage their own Provider user profile, manage their institution's Provider Profile, and manage the institution's programs, as well as reviewing In Demand occupations, researching Education Services, generating Provider Reports, and accessing other communication, assistance, and training services available to them.

The most common task that the Provider user will perform is maintaining program information to ensure that the listed program for their institution remain eligible and approved. That is why *Manage Institution Programs* is the first menu option in the Services for Providers menu group. It lets the user create or modify specific courses and programs that their provider institution offers.

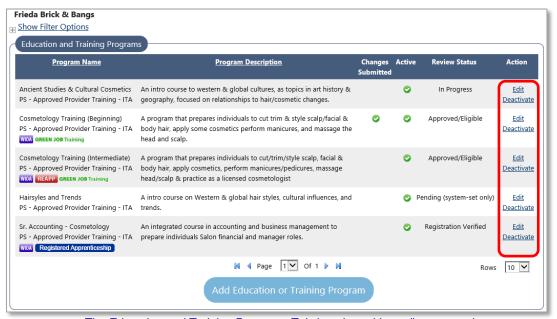




# **Managing Institution Programs/Courses**

Provider Users can prepare and submit the programs to be approved for federal funding (i.e., WIOA-approved provider courses), and to be visible to staff case managers in program/ service enrollments. Or, they can simply create programs for informational purposes (i.e., to be visible to all users from the *Education Services* section of Virtual OneStop). In other words, provider users can use this option to create and maintain their institution's programs, and to submit the programs for approval as WIOA eligible programs available to staff who are enrolling individual in federally funded activities or courses.

When a provider user selects **Manage Institution Programs**, they see a listing of each of the programs (as shown in the next figure). The screen includes an <u>Edit</u> link to open a program and make changes via a Program wizard. The programs list also has an **Add** button, to start the Program wizard, and walk through a step-by-step process for completing information on several tabs and create a new program.



The Education and Training Programs Tab (used to add or edit programs)

The displayed programs that are listed on the screen will include columns for:

- **Program Name** This column includes additional indicator icons (e.g., for WIOA approval, or for a Registered Apprenticeship, or a program nearing its REAPP Subsequent Review due date).
- **Program Description** The entered description (supplied on the first, General Info tab in program creation).
- Changes Submitted Indicating if changes were made since the last review/approval.
- **Review/Approval Status** The current status of program creations and staff review (e.g., In Progress, Pending, Approved/Eligible, Rejected, Registration Verified).
- Action From this column, you can click link to:
  - **Edit** This link opens the program to the first tab of the program, General Information. The tabs available in edit mode, for all field or controls available to the Provider user.
  - Deactivate this link deactivates a program (which will halt any approval process). The
    Provider user must resubmit (via Confirmation tab) before the program will be considered for
    review again.

Note: You will see a 

Show Filter Options control above the programs list. You can expand this control to filter longer lists, based on Program Type, Program Name, Review Status, etc. In other words, you can list only the courses that are Active, or Inactive. You can also can filter by the Program Type (e.g., Approved Provider Training − ITA, Training − Non-ITA), and/or by the Approval Status (e.g., Rejected, Pending, Approved, In Progress).



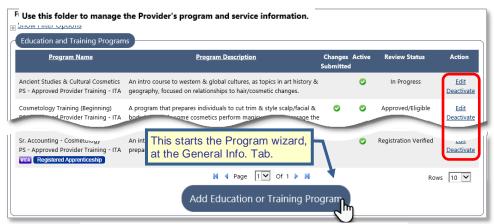
Staff assisting Providers will also see tabs of the Portfolio tree, above the programs list, for areas used only by staff.

The **Add Education or Training Program** button (below the Programs list) starts the creation of a new program. The screens and sections work the same for both creating and editing programs.

The following topic and sub-topics, summarize each part of the program creation process, ending with the application confirmation, submitting the program for WIOA approval and certification by staff.

## Adding a New Program (via tabs of the E&T Program Wizard)

Provider users can start to create a new program for the provider, by simply clicking the **Add** button at the bottom of the program list to open the Program wizard. Then then work through each of the appropriate different Program tabs (ending with the Confirmation tab, where they will submit the program for approval).



The E&T Programs List (to view, add, or maintain programs)

### To add a new program or course:

1 Click the Add Education or Training Program button, at the bottom of the list.

This launches the E&T Program wizard. The wizard guides you through required data entry of each separate progress step (or tab) for entering the segments of data that define the program. You start with the General Information tab.

2 Move through each segment/tab, and enter all required data.

Each of the segments/tabs is listed in the *E&T Program Tabs* table below. Details for each of the tabs are described in separate topics following the *E&T Program Tabs* table (from the *General Information Tab* on page 3-5, to the *Confirmation Tab* on page 3-25).

Note: Users will often start entry of a program, leave the wizard, and then return to finish the entry later. When they reenter the E&T program wizard, tabs will display rather than the green Progress Bar segments that display during the initial entry.

When you reach the Confirmation tab, enter the *Confirm and Submit* acceptance/statement. This will complete the programs application, and submit the program (for review and approval by staff).

Each of the steps/tabs are briefly described in the table below, followed by a detailed topic for each tab.

**Note:** The tab titles in the table below are links to the full topic for each tab.

#### 3-1 Tabs of the E&T Program Wizard

General Information Tab	This tab lets provider users enter basic data about the program, associate it with a CIP code, and indicate any licenses, certificate, degrees, or credentials related to the
	completed program. You must complete this tab to list the course (i.e., to see it in the programs list), and to complete/edit the other tabs (now or later).



Apprenticeship Tab	This tab shows one question, "This program is an Apprenticeship?" It defaults to <b>No</b> . If you click <b>Yes</b> , the question "This Education Program is a <u>Registered</u> Apprenticeship?," displays. If this answer is <b>No</b> to either question, you can simply click, <b>Next</b> .
	If you pick <b>Yes</b> for both, several fields display to identify the apprenticeship registration data. If instruction for the apprenticeship is provided by another provider (i.e., not by this institution), even more Instruction Provider fields will display.
	A Registered Apprenticeship does not require details in most of the other tabs. Once apprenticeship details are entered, you can click <b>Next</b> to quickly step through most tabs (without data entry). If you jump to the Confirmation tab, you will see the minimum needed data (e.g., "Missing required data on Locations and Cost Details tabs").
Additional Details Tab	Numerous fields on this tab are configurable (e.g., Target Audience, Accessibility).
	This tab lets users add details on financial aid, program prerequisites, institution URL, why this is a new program, class size limits, instructor qualifications, equipment used in the program, etc. It may include other configurable fields, such as grievance and refund policies (and may include other State Use fields).
Curriculum Tab	This tab can be configured to display, or not display on the wizard.
	This tab lets users identify one or more curriculum for the program. Adding a curriculum includes two fields: a curriculum code and course title.
Occupations Tab	This tab lets users identify occupations to be associated with the program, by selecting from a Related Occupations list (based on the CIP code from the General tab, or by searching for other occupation codes, if necessary).
Occupation Skills Tab	This tab lets users identify occupation skills acquired form the training program.  Selection is from a standard 14-category list off standard O*NET occupation skills.
Completion Expectations Tab	The display of this tab is configurable (as well as multiple fields on it). If all fields are Off, the tab will not display.
	This tab lets providers define some common course parameters that identify expectations, related to completion of the program. No fields on this tab are required for WIOA and Federal reporting.
Scheduling Tab	This tab has 2 sections: <i>Course Time</i> lets you define hours in class time, lab time, other time, and frequency. <i>Reporting Info</i> requires you to identify the program format (inperson, on-line, hybrid) and the total program length (in hours and in weeks). Reporting Info is required for WIOA reporting.
<u>Duration Tab</u>	This tab lets users define one or more durations for the program (e.g., part-time for three semesters, or full-time, intensive summer course) At least one <i>primary</i> duration is required.
Locations Tab	This tab displays a list of provider locations form which the user picks where the program will be provided (locations are not entered, only selected for the program).
External Approvals Tab	This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard.
	Fields on this tab are used to identify state and/or local approving agencies, or other approval data. (In most sites, this tab does not show.)
Cost Details Tab	This tab lets users enter cost details for the program, for a standard cost structure (e.g., tuition/fees, books, tools, and other costs). Cost details are required for a standard program submitted for ETPL approval.



	<del>-</del>
Provider Representative Tab	This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard.  This tab identifies a "Provider Representative" as the representative to contact for information related to the program. It may include the application signed and received dates specific to the representative. (In most sites, this tab does not show.)
Performance Tab	This tab is configured to let you either: (A) enter performance data per individual (by their SSN), or (B) enter aggregate data (per program year). Some fields for the Performance Year entry method are also configurable, per site/customer.  This tab is used for recording key performance data, used in reviews to determine if the program is included on the ETPL list. Provider users will normally only have one choice of Program Year (if configured to enter aggregate data by year).
Confirmation Tab	This is the last tab that the provider user completes to submit the application for WIOA Approval (by staff). It contains a simple agreement statement, along with two radio buttons: "Yes, I agree submit for WIOA approval," and "No, do not submit for WIOA approval at this time." The user will:
	<ul> <li>Select Yes, if they want to proceed and submit the data in the previous tabs for WIOA approval (or re-approval).</li> </ul>
	Select <i>No</i> , if they want to continue and simply save all data entered so far.
	<b>Note:</b> Other options display for Registered Apprenticeship ITA programs, or for Non-ITA programs
	Red error messages display at the top of this tab to indicate any incomplete required fields on previous tabs. The user cannot proceed (i.e., click <b>Next</b> ) until those fields are completed.
Review Tab	This tab is primarily for staff users. It lets staff monitor/adjust the review status as they review program/course changes, and perform reviews to approve a program's application (or reapplication) for WIOA eligibility. Staff can see a table of records for each review of a change, or a WIOA application, along with the status, and they can edit statuses from this table.
	Providers can also use the tab to view the current status of their program's review, who reviewed it, and when.

**New wizard note:** If you are familiar with the previous forms for adding a program, but new to the E&T Program wizard, you will see that fields are divided into more distinct segments/tabs. For example, portions of the old Program/Service Details area are now in separate tabs (General Info, Additional Details, Scheduling, and Duration tabs).

## **General Information Tab**

When you click the **Add Self Service Education Program** button, it launches the E&T Program wizard. The first step/tab that displays is General Information. This tab (shown below) contains several text-entry fields and drop-down fields to describe and classify the program/course.

Complete all required entries to classify the program:

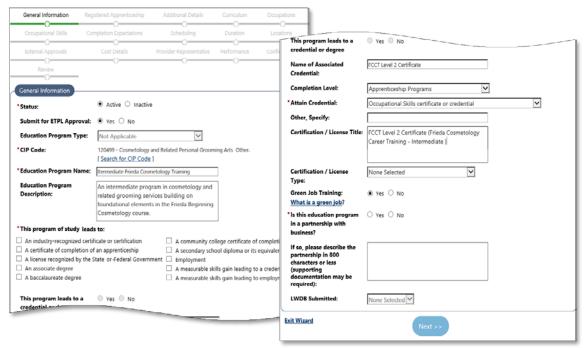
- Active or Inactive radio button is disabled. [Staff determine when a program is marked Active.]
- Select Yes or No for Submit for ETPL Approval (i.e., for WIOA certification).

Yes indicates the program will be submitted for certification (to include in state ETPL).

No means it is not considered for WIOA, only listed with a provider's available courses when looking up the provider under *Education Services*.



• Education Program Type is a disabled field. [The Type is only entered by staff, after your initial program submission.]



## General Information Tab (Base Program Classification Details)

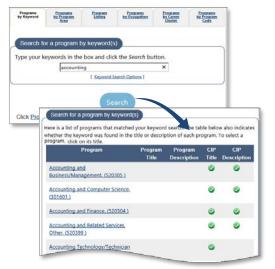
- Use the <u>Search for CIP Code</u> link to assign a CIP Code for the program/course.
  - Select the code that best describes the course. The Search Screen will then disappear. The CIP code title and description will display in the appropriate fields. (See ①, for more notes.)
- Enter an Educational Program Name.
- Enter/edit the Educational Program Description.
   A description is pre-populated from the CIP Code.

## Program of Study Leads to:

 Check one or more boxes for each of the certificates, diplomas, credentials, and/or degrees to which completing this program of study will lead.

### **Program Leads to a Credential or Degree:**

There are several additional fields related to a possible credential, degree, certificate, or license. Two of these field are required.



- Select Yes or No for whether the program leads to a credential or a degree. (Required)
- Enter the name of any associated credential.
- Select the correct Completion Level from the list of choices in the drop-down.
- If participants attain a credential upon program completion, indicate the type of credential from the drop-down options. There are a wide range of options. Select carefully.



**Note:** Attain Credential is a required field. If you choose "Other" from the Attain Credential drop-down, then the next two fields are also required.

- Other, Specify Enter a specific credential name or another credential identification.
- Certification/License Title Enter the full name or title of the Certificate or License.
- Enter a name in the of the Certification/ License Title box, if applicable.
- Select the general type of Certification/ License Title from the drop-down (e.g., National, State, Regional).
- Indicate whether the course offers Green Job Training.
  - The link, What is a Green Job?, can assist providers in understanding whether the course prepares completers for a Green Job or not.
- Select Yes or No to indicate if this program is in a partnership with business.
  - If you select Yes, the description field following the Yes response is required.
  - Enter text, up to 800 characters, to describe the partnership with business.
- Select an LWDB [This is only determined (auto-populated) when program entere by a local staff user.]
- When all data is complete, click the Next>> button.
   If all required field entries are valid, the next tab will display (the Registered Apprenticeship tab).

## (i) More Notes – General Information Tab

- **Required Fields\*:** Throughout the wizard, required fields have a red asterisk (\*). If they are incomplete when you click **Next>>**, red errors above the tab will indicate the fields with missing or incorrect entry.
- **Initial Save:** Once this first tab is saved, the basic program is added. If you exit the wizard, you will see it in the E&T program the list. However, the program is not complete to a point for applying for WIOA certification. You can return to the wizard, and continue adding details.
- **Education Program Name:** This is a disabled field. Only staff can identify the name for the specific program type (e.g., PS Approved Provider Training ITA). They will make this selection before they approve the program for WIOA Certification.
- **CIP Code:** The CIP code is used as a cross-walk to control O\*NET occupations can be related to this program/course in later definitions. Once it is selected, the Program Description will pre-fill with related CIP information.

The Classification of Instructional Programs (CIP) code groups programs for accurate tracking, assessment, and reporting of fields of study and program completions. You can locate the CIP code six different ways: by a keyword, by program area, by an alphabetical list, by O\*NET occupation, by career clusters, or by CIP program codes.



## **Apprenticeship Tab**

When you first click **Next>>** from the General Information tab, the data is saved and the Registered Apprenticeship tab is displayed.

Note: This first save from General information tab creates a record for the program (that means if you log out and return, the record will display in your list of programs). Also, the Registered Apprenticeship tab and subsequent tabs will display completed header information in an Edu. Program Information area (above progress bar) with Provider, program name, a service ID (system generated number), and the CIP Code.

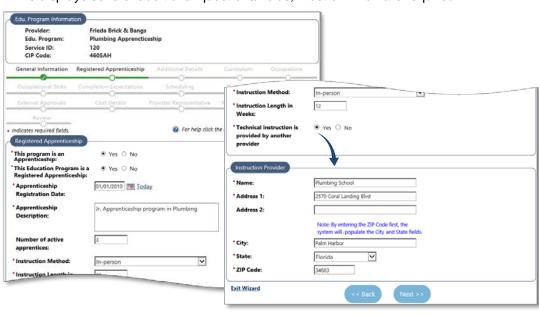
The Apprenticeship tab displays only one prompt, *This Program is an Apprenticeship.* The *No* radio button is selected as the default.

- If the program is <u>not</u> an apprenticeship (which most programs are not):
  - Click the Next>> button.
- If the program is an apprenticeship:
  - Select the Yes radio button.
     This displays a second question, This program is a Registered Apprenticeship?
  - If no, click the Next>> button.
     There is nothing else to do on this tab. The next tab will display Additional Details.

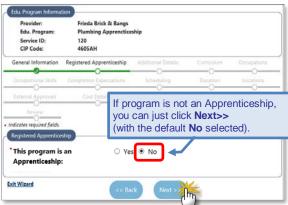
### If the program is a registered apprenticeship:

Select the Yes radio button.

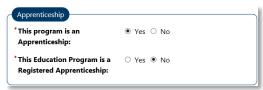
This displays several additional questions/fields, most of which are required.



Registered Apprenticeship Tab (with "Yes" selected)



Registered Apprenticeship Tab (Default prompt = No)





• Enter the appropriate information for each field:

## **Registered Apprenticeship Area**

Apprenticeship Registration Date: Enter the original start date of the apprenticeship.

**Note:** This is the date that the apprenticeship program first became "a registered apprenticeship," for inclusion in ETPL lists. The date can be in the past.

- Apprenticeship Description: Enter narrative text to describe the apprenticeship.
- **Number of Active apprentices:** The number of currently active apprentices in this program. (This is the only non-required field on this tab.)
- Instruction Method: Select the method (i.e., In-Person, Online, or Hybrid)
- Instruction Length in Weeks: Enter how many weeks will occur in the period of instruction for the apprenticeship.
- Technical instruction is provider by another provider: Select Yes, or No.

If Yes, an additional Instruction Provider area is displayed.

#### **Instruction Provider Area**

 Enter the name, address, city, state and zip code of the other provider who also provides technical instruction.

**Note:** If you enter zip code first, it will automatically populate the city and state.

When all data is complete, click the Next>> button.

If all required field entries are valid, the Additional Details tab will display. Most tabs will not require details for the Registered Apprenticeship. (See ①, for more notes.)

## More Notes – Registered Apprenticeship Tab

Additional Tabs: For a Registered Apprenticeship program, none of the fields on the next Additional Details tab, or on most of the following tabs, will be \*Required fields. If you leave the wizard, and return, you will be able to click directly on the Confirmation tab. The top of that tab will indicate any required information still needed. For example, an Occupation is always required, and Cost

Details are required tab if you selected "Yes" for "Technical instruction is provided by another provider." The Confirmation Tab would show messages as indicate in the sample figure at the right.



### The General tab: For a Registered

Apprenticeship program, also consider rechecking two fields on the previous, General tab:

- The check box for "A certificate of completion of an apprenticeship."
   This may apply for a Registered Apprenticeship program.
- The question '1s this education program in a partnership with business?"
  If this apprenticeship is through a business, then the answer should be "Yes," followed by a description.

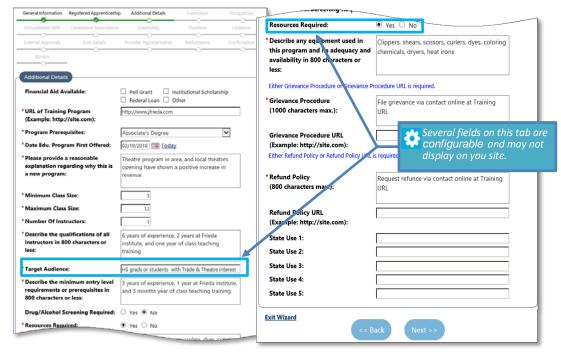


## **Additional Details Tab**

The Additional Details tab has several fields for entering available financial aid, program prerequisites, class size limits, instructor qualifications, grievance and refund policies, and other information.

On the Additional Details tab:

- Complete all required entries (at minimum).
- Complete non-required fields where applicable.



Additional Details Tab (Base Program Classification Details)

- Financial Aid Available: Check the appropriate boxes. (Not required.)
- URL of Training Program: A URL is required (even if it is the primary URL of the provider.
- Program Prerequisites: Select a level of education that is a prerequisite. None is a valid selection, but a selection is required.
- **Date Edu. Program First offered:** Select the date the program is (or was) first offered by the institution (not the date you are entering this program).
- Provide an explanation of why this is a new program: Enter a very short description of why this new program is being added (i.e., the need or demand for the program).
- Minimum Class Size: The minimum students that must enroll for a class to take place.
- Maximum Class Size: The maximum number of students allowed to enroll in a single class.
- Number of instructors: The number of instructors available for the program.
- Describe the qualifications of all instructors: Indicate qualifications (e.g., teaching experience, work experience, education level) for an instructor (up to 800 characters.)
- Target Audience: Enter a brief description of the target audience, or typical source of students (e.g., this may be the level of education plus a specific interest or aptitude).

Several fields on this tab are configurable. E.g., Target Audience, as well as Resources Required, may or may not display or your site, and may not be required if displayed.

- Describe the minimum entry level requirements or prerequisites: Indicate any minimum requirements or prerequisites of the participants (use up to 800 characters). E.g., for an advanced accounting course, provider might indicate that Accounting 101 comes first).
- Drug/Alcohol Screening Required: This is defaulted to No.
- **Resources required:** Click Yes if any specific resources are required (specific tools, access to computers, equipment, etc.).



- Describe any Equipment used, its adequacy and availability. Briefly describe or list any
  equipment that will be used, its availability, and if it is required for student to provider it,
  indicate the required adequacy of equipment, if appropriate. (Use up to 800 characters.)
- **Grievance Procedure:** A brief description of the method to file a grievance connected to the program, or a URL for the site that lists such method/procedures for a grievance, is required.
- Grievance Procedure URL: If a description of Grievance Procedure is not included, a URL is required when the site is configured to require a grievance procedure.
- **Refund Policy:** A brief description of the policies for being eligible for a refund connected to the program is required, or a URL for the site that lists the refund policies.
- **Refund Policy URL:** If description of Grievance Procedure is not included, a URL is required when the site is configured to require a refund policy.

**Note:** For Grievance Procedure and Refund Policy, you must enter a description **or** a URL. If you leave both empty, an error message will display when you click **Save**. Other field like Internship Available or Other Available, or other State Use fields may also be configured on your site, for this tab.

When all data is complete, click the Next>> button.

If all required field entries are valid, the Curriculum tab will display.

**Note:** Required fields have a red asterisk (\*). When you click **Next>>**, red errors will indicate any required fields with missing or incorrect entries.

## **Curriculum Tab**

The Curriculum tab is for entering two simple pieces of information for the program, to associate it with the type of information that may be used in Course Catalogs: a Course Code, and a Course Title. Multiple course codes and titles can be associated with the program. At least one curriculum item is required when the site is configured to display the Curriculum tab.

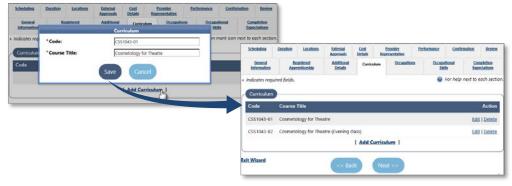


This tab may be configured to not display on the wizard, or to display with Curriculum not required, or to display with Curriculum as a required entry (that is necessary to complete the Confirmation and Review tabs).

To create a Curriculum record:

- Click the Add Curriculum link.
  - A separate box opens above the tab for entry of two fields.
- Code: Enter a code number for the specific instance of the course.
- Course Title: Enter a title for the specific instance of the course.

The Curriculum tab returns, with the record displayed in a Curriculum table.



Curriculum Tab (Adding a Course Code and Title)

- Repeat the steps for other Curriculum records as necessary.
- Click the Next>> button.

The Occupations tab will display.



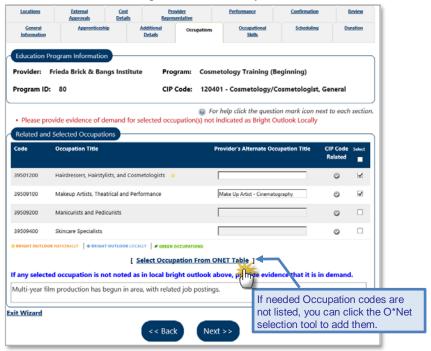
## **Occupations Tab**

This tab lets the provider identify O\*Net occupations that are associated with this program. This is done by selecting occupations from a list of related occupations. The Related Occupations list displays occupations related to the CIP code that was selected on the General Info tab for this program (e.g., the figure below is for a CIP code of 120401 - Cosmetology/Cosmetologist, General, on the General Info tab).

The Related Occupations include indicators for *In Demand* occupations (i.e., if the O\*Net code is classified as a Bright Outlook or a Green Occupations code).

To select related occupations:

- Click boxes in the Select column for the desired occupations.
  - The fields are enabled under Alternate Occupation Title as each box is checked.
- Enter text in the enable fox for any Provider's Alternate Occupation Title (entry is not required).
- Also enter text it the last box to indicate how the occupation is in demand in the area, if a selected occupation is not identified as Bright Outlook Locally.



Sample Related Occupation Codes and Bright Outlook Occupations

Click the Next>> button.

The Occupations Skills tab will display.

## More Notes – Occupations Tab

Bright Outlook Locally – An error message displays if there is no Bright Outlook Locally icon for a selected occupation, and the last box is left blank. The icons for local Bright Outlook are separately identified by Administrators in a specific Manage Bright Outlook Occupations table. The icon will show on this screen, when those occupations related to the CIP code.

**Optional Selection** – An entry is not required on this screen, since some CIP codes may not display possible occupations on this screen. However, if any Occupation Titles are displayed, an occupations should be related.

Search and Select Occupation Code – The displayed list is from occupations, related by the CIP code in the General Info, tab, to this program. If other occupations apply, you can use the standard Occupation Search tool to select the Occupation (the link at the bottom of the list).



## **Occupation Skills Tab**

The Occupation Skills tab lets providers identify and select skills, based on a selection list that pertains to O\*NET occupation skills related to the course. The provider has the opportunity to attach a list of occupational skills that will benefit the participant. These skills are derived from O\*NET and they work in much the same way as the O\*NET skill sets work for employers seeking candidates or individuals wanting to find jobs that are related to their background.

To select occupation skills for the program:

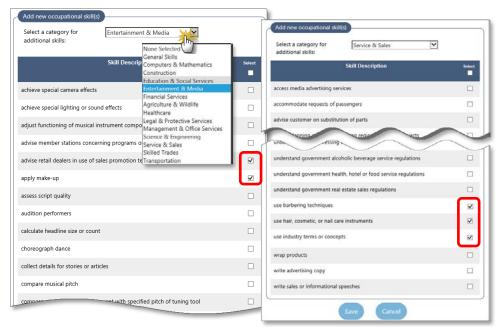
Click the Add new occupation program skills link.



Selected Occupational Skills for a Program

- An Occupational Skills Selection Screen displays (as shown in the following figure).
- Select a category from the Additional Skills drop-down.
- Check the boxes for the appropriate skill in that category.
- As needed, repeat the process until you have checked all skills applicable to the program.

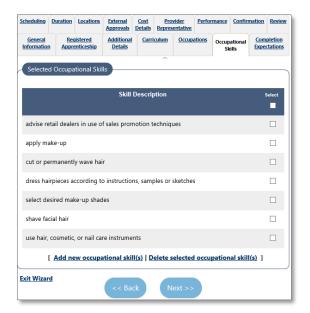
**Note:** When you select other categories and check the appropriate boxes, the checked skills in each category stay in memory until you click **Save** or **Cancel**.



Occupational Skills Selection Screen (14 Categories) Program

Click the Save button to save the list of all checked skills.
 The tab is refreshed and displays all the selected occupational skills.





Program/Service Skills List

**Note:** Once skills are saved, if you click the link to Add new occupational skill(s), the 14-category skills list is redisplayed. However, the saved skills do not display in the tab lists, since they are already selected and saved.

Click the Next>> button.

The Completion Expectations tab will display.

## (i) More Notes - Occupation Skills Tab

**Skills Categories:** The Occupational Skills Selection Screen is an extensive list of O\*Net job skills (14 categories). It is also used in by both individuals and employers (for individual-to-job matching, by job skills).

## **Completion Expectations Tab**

This tab lets providers define some common course parameters that identify expectations related to completion of the program (such as program goals, credentialing body, projected wages).

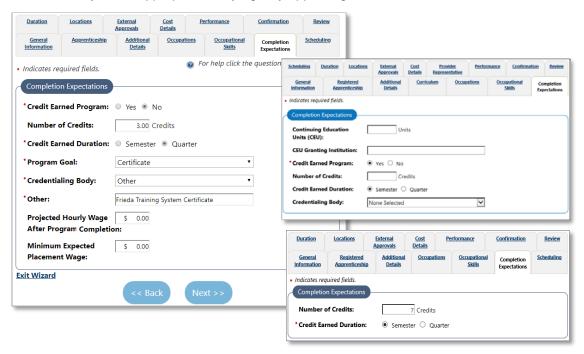
This tab and many fields on it are configurable (it is turned off for some sites). If all fields are Off, the tab will not display. The listed fields, below are for the first of the three sample screens (displayed in the figure).

To complete the Completion Expectations tab:

- Enter the appropriate information for each displayed field:
  - Credit Earned Program: Click Yes if there is a defined number of credit earned.
  - Number of Credits: If you clicked Yes to previous question, enter the number of credits the participant earns by completing this program.
  - Credit Earned Duration: Indicate if the credits are earned in a Semester or a Quarter system.
  - Program Goal: Select a type of completion goal from the drop-down.
    - If you select a credential document (such as a certificate, license, or degree), the next field displayed is Credentialing Body.
  - Credentialing Body: Select a credentialing or accrediting body from those listed in the dropdown.



**Note:** If none in the drop-down applies, select "Other". An "Other" text-field may display, for entry of the appropriate body/agency approving the credential.



Completion Expectations Tab (Three Samples)

- Projected Hourly Wage: Enter a projected hourly wage that participant will receive, after completion of this program, if they attain employment in a related field.
- Minimum Expected Placement Wage: Enter the minimum wage that is expected for placement in a related position, after completion of this program.
- When all data is entered, click the Next>> button.
   The Scheduling tab will display.

### Scheduling Tab

This tab is used to provide scheduling details about the course in three areas: Course Times, Reporting Information, Mode of Delivery.

To complete the Scheduling tab:

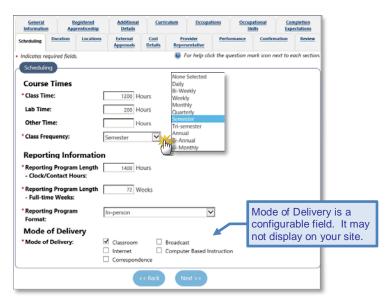
Enter the appropriate information for each displayed field:

### **Course Times**

- Class Time: Enter the total hours in class. (This may be configured as required or optional.)
- Lab Time: Enter the total hours in a lab session.
- Other Time: Enter the total hours for any other type of controlled session times.

**Note:** Enter all course time that applies (all hours for the course). Providers can break this down with Lab Time, and Other Time, although these two fields are optional.

 Class Frequency: Select the frequency to indicate how often an individual can begin the program.



Scheduling Tab

#### **Reporting Information**

Each of the following fields is required for WIOA reporting.

- Program Length Clock/Contact Hours: Enter the total times in the Course Time area.
  - **Note:** The hours will normally match with the total hours under Course Times above. However, these hours are used in Federal Reporting. Course Time hours can meet other state/local purposes.
- Program Length Full-time Weeks: Enter the total number of weeks related to the hours.
  - **Example:** An associate's program may take 4 semester at 18 weeks per semester, may be a total of 72 full-time weeks.
- **Program Format:** From the drop-down, select the format in which the participant receives the training (e.g., In Person, Online, or a Hybrid of the two).

#### **Mode of Delivery**

- Mode of Delivery: Check applicable boxes, if there is more than one delivery type.
  - **Note:** Mode of Delivery is configurable, and may not be displayed for your site. It may also be configured to permit only one selection. The use of the "Program Format" selection, may negate the need for Mode of Delivery fields.
- When all data is entered, click the Next>> button.
   The Duration tab will display.

### **Duration Tab**

The Duration tab lets providers enter one or more durations for the program/course (e.g., a primary and alternate duration). At least one duration, the *primary duration*, is required (when the site is configured to required duration). If multiple durations are created, the times can be different for each duration record (e.g., a part-time night or weekend course for three semesters, or a full-time, intensive summer course).

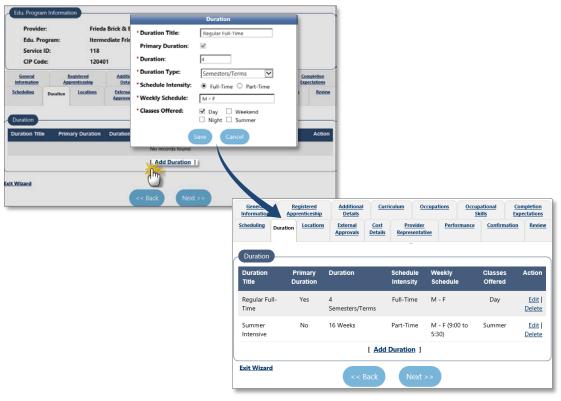
To create a Duration record:

Click the Add Duration link. A separate box opens above the tab for entry of Duration fields.



- Enter data in each field to definite the duration:
  - Duration Title: Enter a title for a duration length of the program (e.g., 4-semester part time, summer semester intensive).
  - Primary Duration: Check the box for the primary duration of the program, if more than one may apply (if only one duration is entered this check box is auto-selected).
  - Duration #: Quantity/ number for the type of duration.
  - Duration Type: Select the type from the drop-down (i.e., Hours, Months, Weeks, Semester).
  - Schedule Intensity: Select Full-Time or Part-Time.
  - Weekly Schedule: Enter the weekly schedule for the program courses which indicates the week days (e.g., Monday Friday, Mon–Tue–Thu).
  - Classes Offered: Check boxes for how the program is offered/available for this duration (e.g. Day, Night, Weekend, and/or Summer classes).
- When all data is entered, click the Save button.

The Duration tab returns, with the record displayed in a Duration table.



Duration Tab (for Multiple Duration Types)

- Repeat the steps for other Duration records as necessary.
- When all data is entered, click the Next>> button.
   The Locations tab will display.



### **Locations Tab**

The Locations tab is used to indicate the provider's locations that sponsor the program (i.e., which locations offer this specific program). When multiple locations exist for provider institution, all active locations are shown in the list. Multiple locations can be selected.

Check the boxes to select one or more locations where the program will be offered.



Location Tab (for Multiple Locations)

• When locations are selected, click the click **Next>>** button.

The External Approvals tab will display.

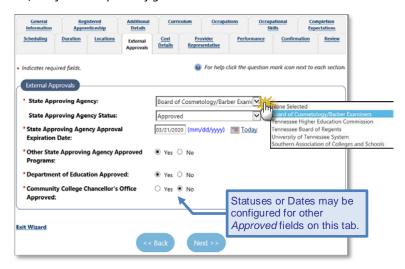
**Note:** Existing locations for the institution can also be added or edited from the Locations tab of the Provider Profile. See the topic Add a Provider Location on page 3-35, for details.

### **External Approvals Tab**

The External Approvals tab may contains several fields or prompts for identifying information about state approving agencies, department of education, community college or other approval data.

\*

This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard. The listed fields, below, are for a sample configuration.



External Approvals Tab

To complete the External Approvals tab:

Enter the appropriate information for each displayed field:



- State Approving Agency: Select from the agency list (there may only be one selection).
- State Approving Agency Status: Select the status from the possible statuses for the agency.
- State Approving Agency Expiration Date: Based on the response to the status, an expiration date may be required. If so enter the date.

Answer any other required field, such as the following Yes/No fields:

- Other State Approving Agency Approved Programs
- Department of Education Approved
- Community College Chancellor's Office Approved
- When all data is entered, click the Next>> button.
   The Cost Details tab will display.

#### **Cost Details Tab**

Cost details are required for a standard program submitted for ETPL approval. The Cost Details tab is used to indicate detailed costs of the program, through a standard cost structure for the total training costs (which include Tuition/Fees, Books, Tools, and Other Costs).

To add the cost details for the program:

- Click the Add Cost Structure link on the blank screen.
  - A screen displays for entering cost details.
- Select a Cost Structure type from the drop-down (e.g., Total CRS Training Costs).

This displays fields in the Cost Details area (as shown below).



Adding Cost Details (via a Cost Structure)

Enter the cost/amount in each of the fields that apply.



**Note:** Cost fields can be left as \$0.00 because of cost variations, and edited before submission or each enrollment record. However, submitted costs should be for the

primary duration identified in the previous Duration tab. A reminder of this shows at the top of the screen.

- Click Save. The Cost Details tab redisplays, showing costs plus an Action column (to Edit or Delete costs).
- When all cost are entered correctly, click the Next>> button.

The Provider Representative tab will display.

#### More Notes – Cost Details Tab

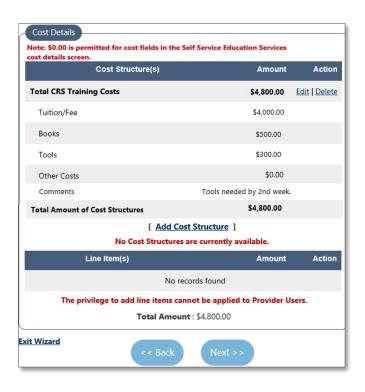
Required Cost Details: Cost details are required for programs submitted for ETPL approval (unless it is a Registered Apprenticeship with no technical instruction by another provider).



always one standard cost structure available (Total CRS Training Costs). Your site may display additional Cost Structures selections, if other cost structures have been defined for your site (via a configurable Cost Structure look-up table used to add different cost structures for training programs).

**Line Item Cost Details:** Provider users cannot create separate Line Item costs. The Line Item link is only accessible to staff (who are assisting the provider).

For an example of another cost structure, or for details on adding Line Item Cost Details, see the corresponding topic in the chapters for a staff user, Chapter 8, Assist a Provider – Managing Programs.



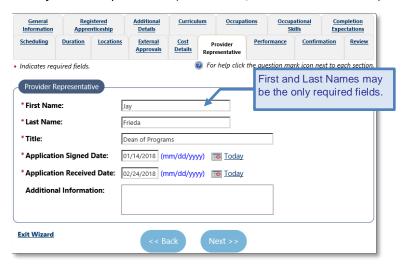


### **Provider Representative Tab**

Like the External Approvals tab, the Provider Representative tab may contain several fields or prompts for identifying information about an individual defined as the *Provider Representative*. This is someone designated as the official person to contact, at the provider, specifically about this program.

\*

This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard. The following fields are for an example screen. (In most sites, this tab does not show.)



External Approvals Tab

To complete the Provider Representative tab:

- Enter the appropriate information for each displayed field, as appropriate:
  - First Name
  - Last Name
  - Title
  - Application Signed Date
  - Application Received Date
  - Additional Information

**Note:** If this tab exists, first and last name are normally required fields. For any customer who only had a one name field (first and last in one field) for Provider Representative prior to this E&T wizard, the full name entry was moved into Additional Information during conversion.

When all data is entered, click the Next>> button.

The Performance tab will display.



#### **Performance Tab**

The Performance tab is an important tab for recording the performance data for individuals enrolled in the program (which is used in federal reporting). The tab is also used by staff as part of their review to determine whether this program will be added to, or will continue to be included on the ETPL list. The Performance tab lets you maintain the performance data for individuals who registered for the program/course, and maintain statistical data on the success rate of the course.

Depending on your site's configuration you will see: (A) an SSN Performance Data control (for entering data specific to each enrolled individual, by their SSN), or (B) a Performance Year control (for entering aggregate data for enrolled individuals, by the year).



For SSN, see below

For Performance Year, see the next page

Each of the two methods for entering performance data are described in the following two subtopics.

### SSN Performance Data (Adding Data per Enrolled Individual)

If no data has been added yet for any SSN, then only the **Add SSN Record** button will display. If some data was added already, then you will see rows for each individual/SSN that was entered, and the **Add SSN Record** button will display below the list.

### To add performance data (for an SSN):

- 1 Click the **Add SSN Record** button to display SSN Performance Details fields.
- 2 From the SSN Performance Details section, enter all applicable data for the most recent status for one SSN.

**Note:** At minimum you must enter SSN, Start Date and Status. Depending on your entries, certain statuses may not be selectable.



Entering Performance Data for a Specific SSN

- 3 Click the Save button. The list of SSNs will reload with the new entry included.
- 4 Repeats the process for each SSN, for each individual enrolled in the program.
- 5 When all data is entered for each SSN, click the Next>> button. The Confirmation tab will display.



**Note:** A separate left-navigation menu option for importing the SSN data through an Excel spreadsheet is under consideration for a later enhancement.

### Performance Year (Adding Aggregate Data)

If no aggregate data has been added yet for the performance year, you will start by creating a Performance Year record for the data. When a new program is first added, this tab will be empty, except for two controls:

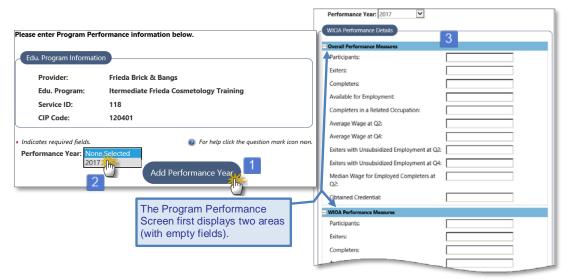
- ♦ a Performance Year drop-down control
- an Add Performance Year button

To add a performance year (and start entering details for the year):

- 1 Click the **Add Performance Year** button. This will load the drop-down with one or more years (depending on a configuration in Admin).
- 2 Select the year from the Performance Year drop-down list.

**Note:** Staff may see options for current year, one year subsequent to current year, and up to 10 prior performance years, for any historical data. (This is not determined by Admin settings.)

The Program Performance screen is initially empty. Once you select a Performance Year, the screen updates to display two areas: WIOA Performance Details and Common Fields (the Common Fields are is configurable – most sites do not include it).



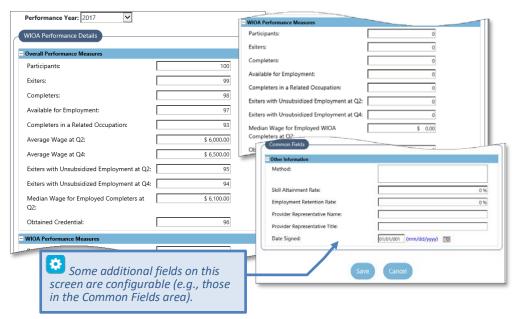
Opening a Program Performance Screen for Aggregate Data Entry for a Specific Year

- 3 Enter data in the fields in each area, for the displayed Performance Year. This includes:
  - Data for Overall Performance Measures
  - Data for WIOA Performance Measures
  - Any applicable data for Common Fields

**lote:** The Overall or WIOA Performance Measure fields are not required, since they may not be known for a course, at the beginning of the program year. If you do not enter data, a value of zero will be entered in the field, as shown in the following figure.

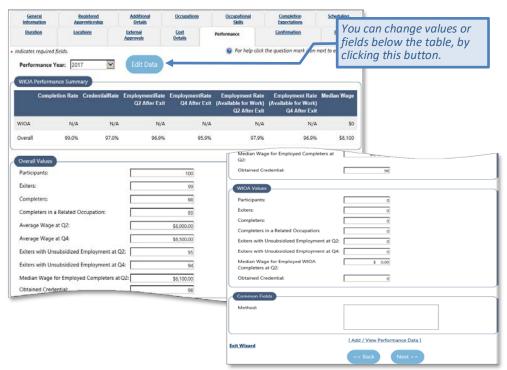
Keep in mind that performance data is not required but is critical to reliable WIOA certification. It must be verified by staff to be accurate. Therefore, sites are often configured to limit the entry to staff, and only allow provider users the ability to view the completion, employment, and performance rates. You may not have the ability to edit this performance data.





Initial Entry of Program Performance Data

4 Click Save (once you have entered as much performance data as is currently known/gathered). The Performance tab is redisplayed to include a WIOA Performance Summary above the areas for the entered Overall Values, WIOA Values, and Common Fields.



Program Tab with WIOA Performance Summary Table

This summary table lists rates used for review and for WIOA reporting – e.g., Completion Rate, Credential Rate, and Employment Rate after Exit, for Quarter 2 and Quarter 4 (as shown above).

5 When all data is entered, click the **Next>>** button.

The Confirmation tab will display



# Confirmation Tab – for WIOA Application Approval

The Confirmation tab is the last tab you will complete for a program, as the provider user. It is used to confirm the application's submission for WIOA Approval by a staff member. The tab will display any missing information in previous tabs that you still need to provider before you can confirm and submit the program for staff approval.

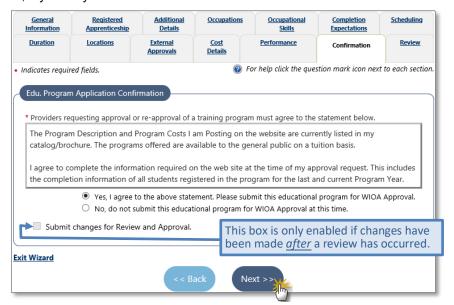
This section contains a simple confirmation statement that you must read before you submit the program for approval.

**Note:** Red error messages display, if any required fields are incomplete on previous tabs. For example, if the program is set as a Registered Apprenticeship, and you skipped to the Confirmation tab, messages may display at the top of the tab (as shown below).

- · Missing required data on Locations tab
- · Missing required data on Cost Details tab

### ► To apply and confirm the program/course for staff review:

- Select Yes, if you want to proceed and submit the data in previous tabs for WIOA approval.
- Select No. if you only want to continue and save all data entered so far.



Program/Course Confirmation Tab

Click the Next>> button. The Review tab displays (and the course is submitted for staff approval).

**Notes:** A notification message is sent to workforce staff to review the course (to either approve or reject it). If **No** is selected, the course is only saved and included in Education Services (depending on site configuration).

If Submit for ETPL Approval was not selected on the first, General Information tab, then the Confirmation and Yes/No radio buttons will not display. There will only be a check box to Submit Education Program for Review and Approval.



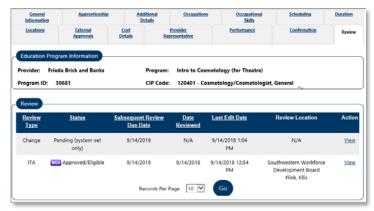
# Review Tab - Status and Staff Approval

The final tab of the E&T Program wizard is the Review tab, which is primarily for staff users. Provider

users cannot review and approve their own programs. Staff will review the course and provide a status. However, you (or another provider user for your institution) can view this tab to discover the status of any review (who reviewed it, and when).

Staff will use the Review tab to adjust the review status, as they review the program/course (e.g., recommend, approve or reject).

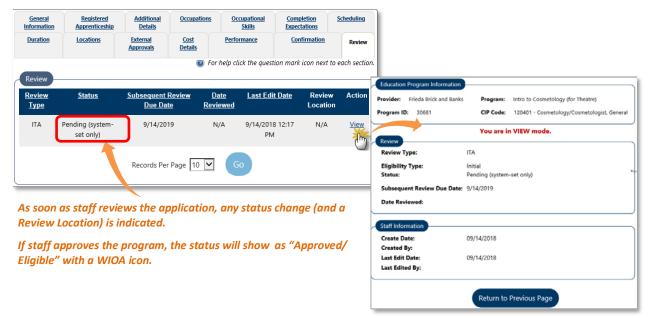
You can click a <u>View</u> link (for each review or change record) and see details on the review.



Review Tab (with Staff Approval & User Change Submitted)

### To View the Review Status (from the Review tab):

- Click the <u>View</u> link in the Action column. A Review screen displays (in VIEW only mode).
- Review data on the screen.



Review Tab (at end of initial Submission)

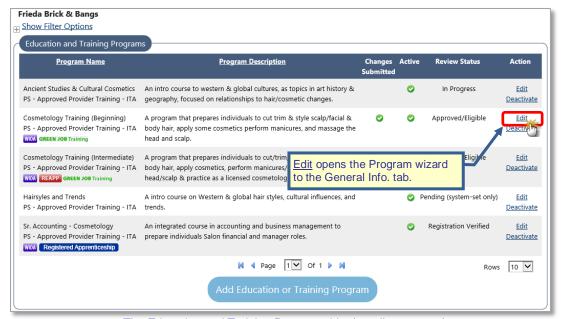
When done, click the Review to Previous Page button.

..



# Editing a Program (via the Edit link and E&T tabs)

When you click the <u>Edit</u> link for a program, from the Action column of the E&T Programs List, it will open the same Program wizard and the related tabs that were first displayed in adding the program (as shown in the following figure). You can click on the links to move to any tab, make edits on the tab, and then confirm your edits, in the same way that you did for initial creation of the program.



The Education and Training Programs List (to edit programs)

### ► To Edit a Program:

- Click the <u>Edit</u> link from the action column.
   The wizard opens to the General Information tab.
- Select the tab that requires edits.
- Use the controls to edit or add to information for that tab.
- Click the Next>> button to save any changes for the tab.
- When all additions or edits are made, click on the Confirmation tab.
- Check the box Submit for Review and Approval, if you want to save all changes and have staff approve them.

**Note:** If you want to save change, but not submit them yet (e.g., you may have more to make), do not check this box. If a review is pending, the box will be disabled.

- Click the Next>> button to save all changes and move to the Review tab.
- Click the Finish button to return to the E&T Programs List.

**Note:** For more details on editing any specific section, see the previous topics for each tab related to Adding a program. You can see a brief description, and links to each tab and topic, from the Table 3-1 Tabs of the E&T Program Wizard, introduced on page 3-3.



# **Program Reapplication Confirmation**

When a staff member approves a program for ETPL eligibility (on staff's edit screen from the Review tab), it will display to you (and other provider users) with a WIOA icon. The WIOA icon displays on the Education and Training Programs list (under the program name).

Staff's approval also includes a Subsequent Review Due d (which is normally one year from staff's intial approval date). When the program nears that date (e.g., within 30 days of the date) you will see the

**REAPP** icon dieplayed next to the WIOA icon.

There may or may not be additional changes to descriptions for the program, as part of renewing the application for another year. However, the provider must review their information, make any updates to be current (e.g., new performance data), and then confirm and resubmit the program. It will follow the same process and the original review.



Sample Program Due for WIOA Reapplication (i.e., Review, Confirm, and Resubmit the Program)

A staff member will need to review the program and reapprove it, once it is resubmitted.

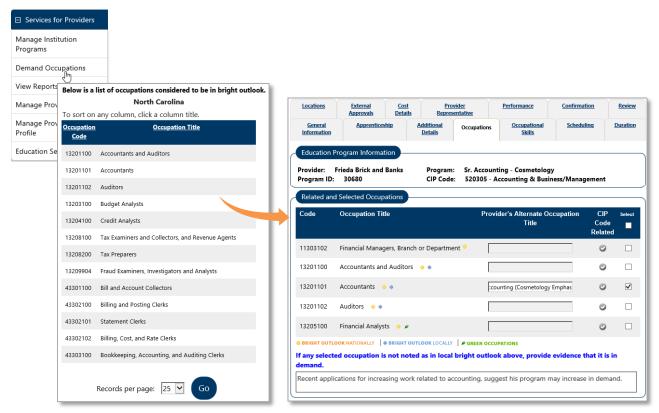
### ▶ To Submit a Program for Reapplication:

- Identify that the program has a REAPP status (on the Education and Training Programs list).
- Click the Edit link from the action column.
  - The wizard opens to the General Information tab.
- Select the tabs that requires edits (as indicated in the previous topic for editing).
- Use the controls to edit or add to information for necessary tab.
- When all additions or edits are made, click on the Confirmation tab.
- Check the box to "Submit Changes for Review and Approval.
- Click the Next>> button to save all changes and move to the Review tab.



# **View Demand Occupations**

Another menu option for provider reps is <u>Demand Occupations</u>. Selecting this option shows a list of all occupations defined in the provider's state (or local regions) as In Demand for the Provider Services system (also referred to as Bright Outlook occupations). This display indicates the specific O\*NET occupational code for the demand occupation and the O\*NET occupational title.



Sample List of Demand Occupations

This information can be valuable to providers when they attempt to research and create courses and programs that have inherent benefits in the workplace. When occupations are selected as part of creating/adding a program, any selectable occupations that are also associated with a program's CIP code, will show in this list. You can use the list to identify any occupations that are In Demand or Bright Outlook, and should be associated with the program.

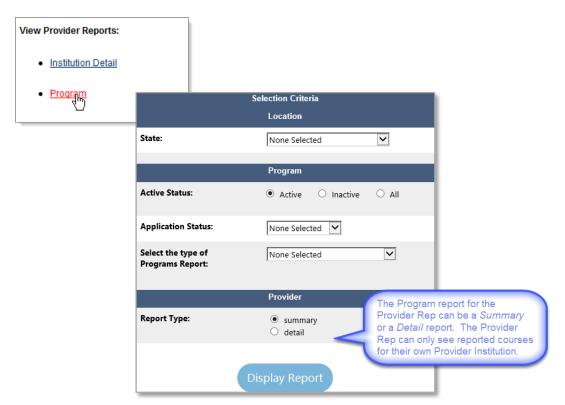
**Note:** This list is controlled in the Administrative side of the system, specifically by administrators in charge of the CRS Program Administration parameters. Those administrators must coordinate with the Labor Market Information specialists to ensure that the most recent state trends in job opportunities are reflected in the Labor Market Services and the Provider Services modules.



# **View Reports (for Provider Users)**

*View Reports* for provider users contains three different report categories: <u>Institution Detail</u>, Program (which enables selection criteria for both Program Summary and Program Detail types) as well as <u>Program</u> reports),

Click the <u>View Reports</u> link to begin selecting and generating the desired reports.



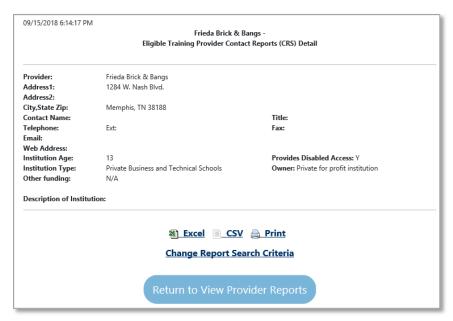


For more information about use of the provider reports, you can access the Learning Center training videos. See the topic, "Learning Center (Provider Courses)" in chapter 4, for more details, or click this link to start the <a href="Provider Reports">Provider Reports</a> video.

## Institution Detail Reports

Institution Detail reports contain a summary of information on the provider, such as addresses, contact name, telephone, email, and web address. This information is derived from the provider's initial profile and registration information. The report can be saved in two formats: Excel and Comma Separated Value (CSV), or it can be printed. The following is an example of this report.

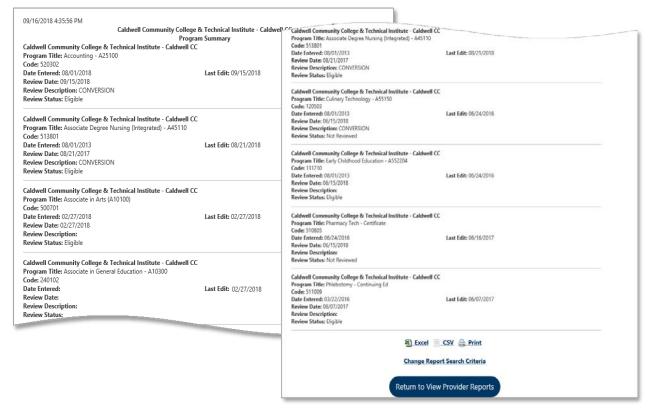




Institution Detail Reports

# **Program Summary Reports**

The Program Summary reports accurately describe the information that providers can access. Users will retrieve a table of all courses, showing information such as CIP Codes; date entered; program title; and review date, description and status. The following is an example of this report.

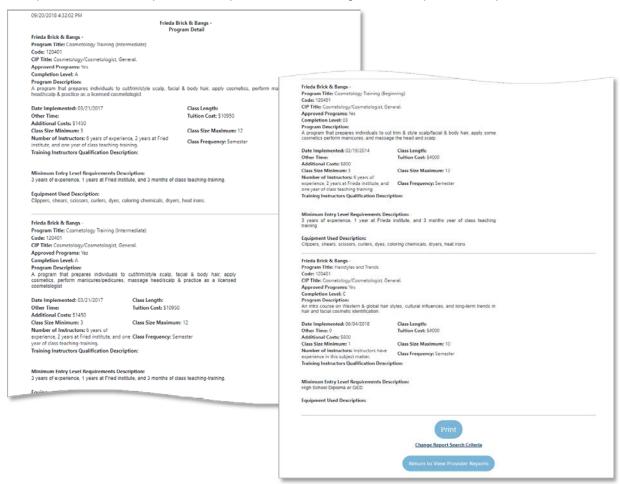


Program Summary Report



## **Program Detail Reports**

Program Detail reports contain additional information about each course the provider offers. The information can include the Program Title, CIP Code, CIP Title, WIOA approval status, Completion Level, Program Description, Date of implementation, Costs, Class Length, Class Minimum and Maximum Sizes, Number of Instructors, Class Frequency, Training Instructors Qualification Description, Minimum Entry Level Requirements, and Necessary Equipment. Much of this information is derived from the course description section that a provider completes. The following is an example of this report.



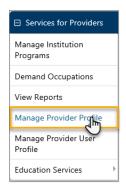
Program Detail Report

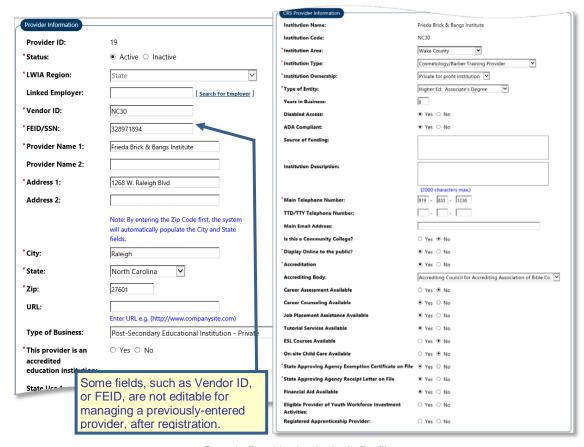


# **Manage Provider Profile**

The Manage Provider Profile menu option (from left navigation) lets a provider user review and change some of the basic detail for the institution. This includes provider details created at the time of initial registration (e.g., city, ZIP, address), as well as CRS provider details that are publically displayed through education services (e.g., institution type, accrediting body, financial aid available).

This information is presented on the General tab, in two sections which have Details links to access the sections. Provider users can highlight specific fields, delete the information, and replace with updated information (as shown in the following figure for the General tab).





Sample Provider Institution's Profile

**Note:** The General tab also includes a section for Provider Type Details, which defines the general types of programs and services with which the provider can be associated. This area is "view only" for the provider users – only staff can set and change the institution's Provider Types. The section does not show here.

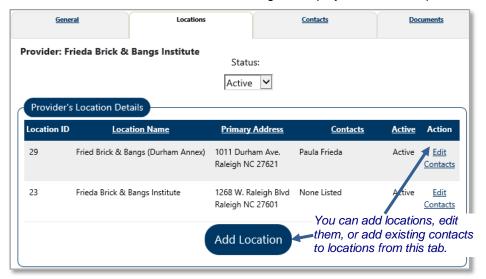
### **Provider Locations**

The Locations tab allows provider users to create and review the institution location details. This information is crucial to provider user and program creation because each provider user must be associated with a location, and programs are linked to a specific location from the Locations tab in the Program wizard. The following figure displays a sample Locations tab.

From the Locations tab, you can:



- Filter the locations shown for active or inactive locations.
- Click the Add Location button to enter required and optional location data in a detailed Provider Location screen. For details, refer to the "Adding an Employer Location" topic on the next page.

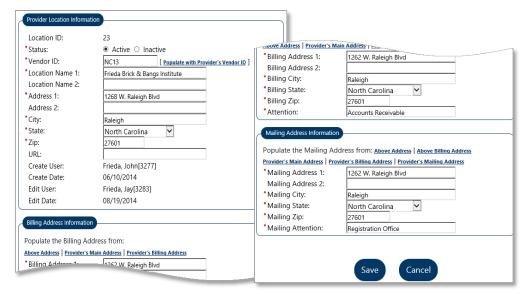


Locations Tab

- Click the <u>Edit link</u> (in the *Action* column) to display the same Provider Location screen for viewing and making changes to the existing location information. For details, refer to the "Editing Employer Locations" topic that follows.
- Click the <u>Contacts</u> link (in the *Action* column) to access the existing Contacts and select them or deselect the as contact for association to the location.

#### **Edit Provider Locations**

By clicking the <u>Edit</u> link for a desired location, you can modify details about the site, including the existing provider name and address, billing address, and mailing address, as well as whether the location is active or inactive. The following figure displays a partial sample Edit Location screen:



Edit Location and Change Primary Location Screens

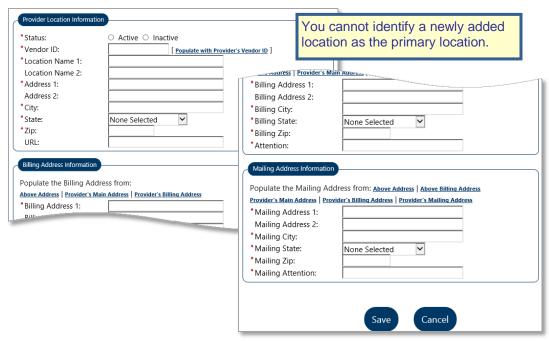
**Note:** By deactivating a location, you also deactivate contacts associated with that site. When/if you reactivate the location, you will also have to re-activate the desired contact(s) at that location.



#### Add a Provider Location

If a registered provider offers programs/services at more than one site, you can record additional location information by clicking the **Add Location** button at the bottom of the Locations tab.

The following figure displays a partial Add Location screen.



Add Location Screen

At a minimum, complete all required items on this screen, and click **Save**.

You can modify this information at any time.

**Note:** if you are changing or entering a new address, entering the zip code first will automatically populate the city and state.

You must specify a billing and mailing address for the site, but you can use links to copy these form an address already entered. However, you must enter an "Attention" title manually in each.

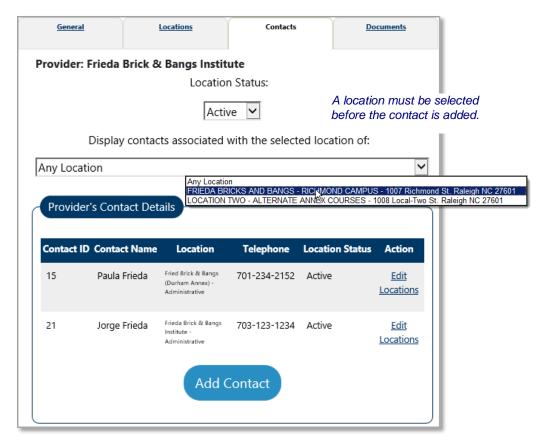
### **Provider Contacts**

The Contacts tab allows provider reps to create and review contact persons at each provider location. They can identify several possible contact persons for one or more locations. The following figure displays a sample Contacts tab.

From the Contacts tab you can:

• Use the Contact/Users list to display contacts/users associated with all locations or with a specific location (as shown in the figure that follows).





Contacts Tab

From the Contacts tab, (depending on your employer permission) you can also:

- Display contacts associate with Active, or Inactive locations.
- Display contacts associated with all locations or with a specific location (either active or inactive).
- Click the Add Contact button to display the Provider Contact form and enter required and optional contact data. For details, see the "Adding a Provider Contact" topic.
- Click the <u>Edit</u> link (in the *Action* column) to display all Provider Contact for form to view or make changes to existing contact information.
- Click the <u>Locations</u> link (in the *Action* column) to access the existing location(s) for the contact and select or deselect the locations for association to the contact.

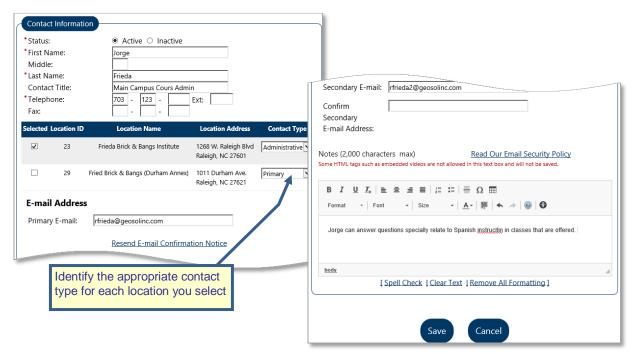
### **Edit Provider Contacts**

By clicking the <u>Edit</u> link for a desired contact person, you can modify details about this person, including the following:

- Contact Information such as Name, Contact Title, Phone, Fax, and Status (active or inactive)
- Associated Locations (including the contact type at each location)
- Email address
- Other non-modifiable Information (includes create/edit dates for this contact)

The following figure displays a sample Edit Contact screen:



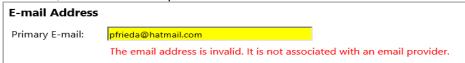


Edit Contact and Change Contact Type Screen

Edit the contact information as appropriate and select **Save**. The Contacts tab will redisplay with your changes.

**Note:** To deactivate the selected contact person, click the **Inactive** button and click **Save**. You may reactivate this contact person at any time simply by clicking the **Active** button and clicking **Save**.

The email address includes an email confirmation link. Click the link to confirm that the email exists and was typed into the fields correctly. If the email provider is misspelled it may appear as shown below, with Hotmail misspelled.



### **Add a Provider Contact User**

When you create a provider location, the system includes links for you to record information for one or more contact persons at that location.

You can record these contacts by clicking the **Add Contact** button at the bottom of the page to create the contact, but you must first have a location selected from the

drop-down at the top of the page.

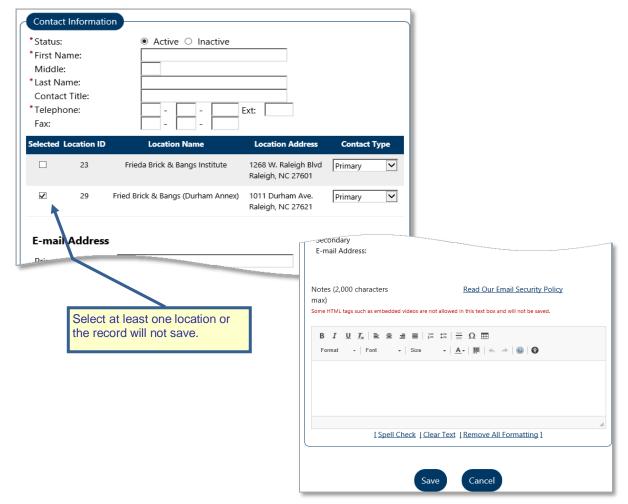
If a location is not selected when you click the **Add Contact** button, a pop-up will display.

The following figure displays a sample Add Contact screen, which include fields to definite the following:



- Contact Information such as Name, Contact Title, Phone, Fax, and Status (active or inactive)
- Associated Locations (including the contact type at each location)
- Email address
- Other non-modifiable Information (includes create/edit dates for this contact)





Add Contact Screen

In order to successfully save this new contact record, you must associate this person with a particular location. To associate the contact with an existing location, click the checkbox that corresponds to that location in the *Selected* column. One contact can be associated with multiple locations.

After entering the contact information, click the **Save** button. The Contacts tab will redisplay with your added contact displaying.

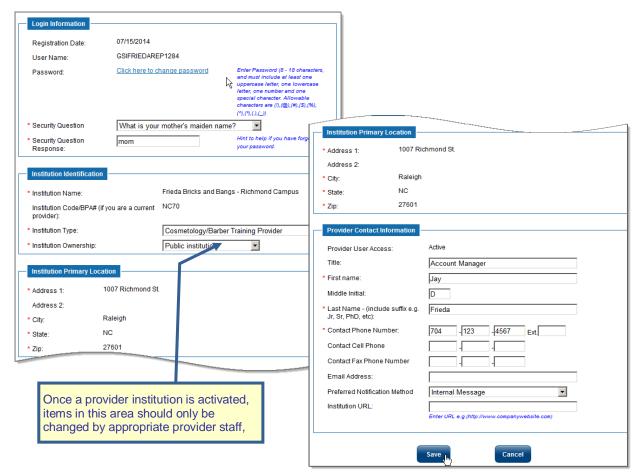


# **Manage Provider User Profile**

The <u>Manage Provider user</u> menu option lets provider users review and edit their own contact information as well as the login security for accessing the system.

This information is presented in a screen with four sections. Provider reps can only make changes on this screen through two of the areas (as indicated below):

- **Login Information:** The provider user can change their security question and response, and they can change their password. Their user Name cannot be changed after registration.
- Institution Identification: This section is only for informational purposes. Any items in this area
  that need to be changed must be changed by a staff member after the provider institution is
  created and activated.
- **Institution Primary Location:** This section is only for informational purposes. The provider user can change the location they are associated with, but only from the Provider Profile (as described in the previous topic).
- Contact Information: The provider user can change any of their basic contact information from this screen. However, they must use the Provider Profile (as described in the previous topic) if they want to make changes further changes, such as changing the location with which they are associated as a contact.



Provider user Profile (Manage / Edit Screen)



# **Education Services**

Education Services is available and helpful to many types of users (including provider user) and operates in the same manner regardless of the user type accessing it. The links and tools help the user (such as a provider user) review the different training and educational programs that are offered by multiple eligible training providers.

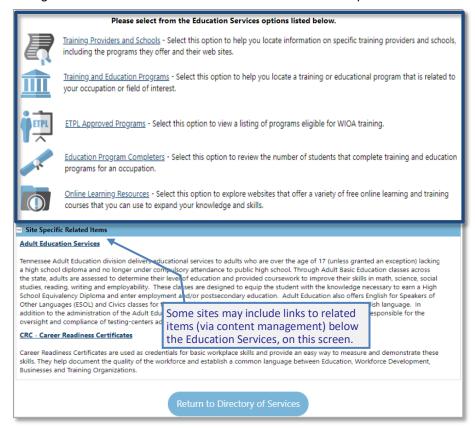
For example, provider users can research the different schools; they can compare a program or course of study offered by different schools in the same area, look at any available information about job placement of graduates, etc.

This section is not related specifically to WIOA approved courses; it is a directory of all schools/ providers and course information in the database. However, it may be configured, on your site, to only display WIOA-approved ITA programs. For WIOA approved programs, it may also be possibly to display recorded performance information, such as the completion rate, employment rate, employment rate for a related occupation, and average wage.

**Note:** The following information covers the full range of Educations Services. This information is also covered in the Virtual OneStop Individual User Guide and the Employer User Guide, since those users also have access to these same features.

In a later release, this information may be included as a separate appendix, which will be identical for all three guides. If the information that follows has less detail than you are looking for, also refer to those guides for descriptions of the Education Services components.

Education Services helps providers review the different training and educational programs that are offered. You can research the different schools for these courses and look at information about job placement of graduates. Unless configured to display only WIOA-approved ITA programs, this section is not related to WIOA approved courses; it is merely a directory of schools/ providers and course information. The figure below shows the standard Education Services Options:



Education Services Options Screen



Links on the screen let you access the following options:

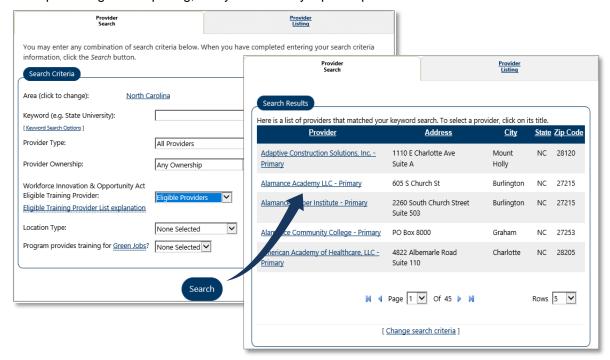
- Training Providers and Schools lets you search for information about specific training providers.
- **Training and Education Programs** lets you search for training or educational programs that meet your requirements.
- **Education Program Completers** lets you view the number of participants who successfully completed training for the selected occupation.
- Online Learning Resources is used to access links to external websites that may offer a variety of free online learning and training courses. (This is a web-management page. Additional websites can be added frequently by your site administrator.)

For details of each sub-option, refer to the topics that follow.

# **Training Providers and Schools**

Use the Provider Search or the Provider Listing tabs to locate a provider, and click the Search button.

- Provider Search Use this tab when you know the provider name or a keyword in the provider name (e.g., Purdue, Institute). It's also helpful to know course title and the education or training type (nurse's aide certification, computer training, etc.), since you may find a large number of courses for a specific provider.
- **Provider Listing** Use this tab, or the link at the bottom of the screen, to view an alphabetical list of available training and educational providers. This link is useful if there are questions pertaining to the spelling, or if you have only a partial provider title.



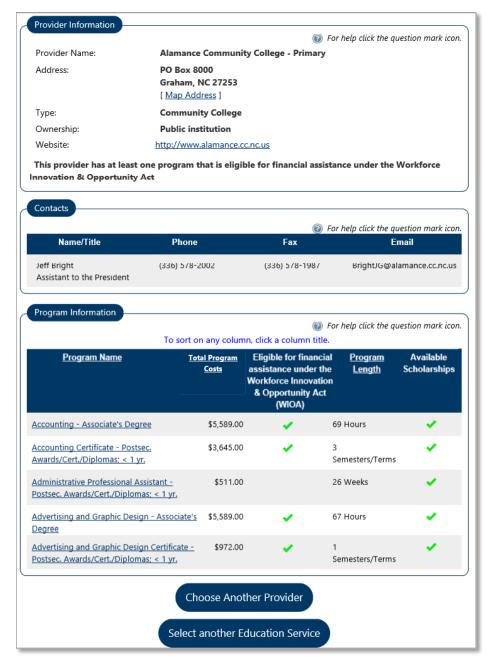
Search Screen for Training and Education Providers (and Search Results)

Once you've searched for a training provider using the *Provider Search* tab, a screen will appear (as shown above) that displays search results for your area and the criteria that you entered.

To find out more about a specific provider, click that provider's name.

Following is an example of a provider information screen. Typically, the provider's address, telephone number, web address, and other information are listed. If a list of programs is available, it is also shown.



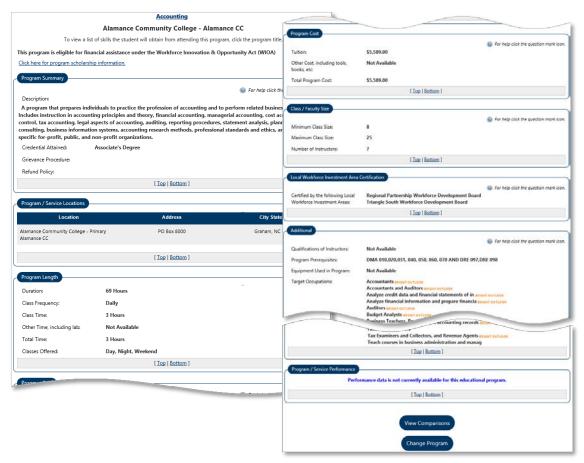


Educational Services Detail Screen

- If the educational institution has a website, click the URL link to go to that website. The school's
  website can provide details on school activities, programs, and other information.
- Click the <u>Map Address</u> link to show where the provider is located. A screen will display a map and directions, if they are available.
- To view information about a specific program listed for that school, click the program name.
   Available information will be presented. (The WIOA Eligible column indicates the school has been approved to use WIOA funds for this program your system may not include the WIOA-eligible column, depending on your state's provider information.)

The following figure displays a sample of the screen that lists educational program information. This screen may appear differently dependent on whether your system has the *View Comparisons* functionality.





Educational Program Information Screen (via Programs for a Provider)

The sample above, of an Educational Program Information screen, is derived from a system which has *View Comparisons*.

From the Program Information screen you can:

- Click Change Program to see information about another program.
- Click View Comparisons to compare the current program with others. A screen appears (as shown in the following topic), which displays options for seeing comparative information about the current program in relation to others.

**Note:** The View Comparisons option is available from the bottom of the Program Information screen regardless of whether the path to get there was through searching a provider/school to see a program listing or searching directly for a desired program. The options are described in the following topic.

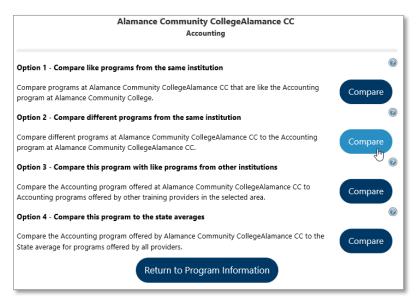
### **Viewing Program Comparison**

From the Program Information screen, you can click a **View Comparisons** button to compare the displayed program with other programs in the following ways:

- Compare similar programs from this institution to the currently selected program.
- Compare programs different from the currently selected programs that are located at the same institution.
- Compare similar programs from other institutions to the currently selected program.
- Compare the currently selected program to the state averages.

Note: The View Comparison function may not be available in your system.





Program Comparison Options Screen

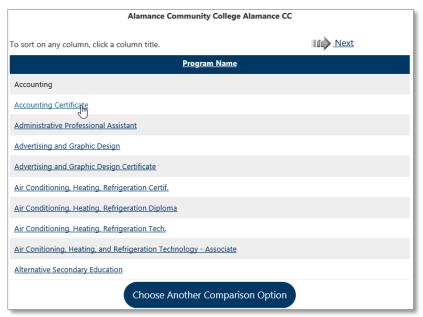
From this screen, you can select the four comparison options which are briefly described in the topics that follow:

### Option 1: Comparing a Program to Similar Programs at the Same Institution

When you click the **Compare** button for similar programs, a screen appears that lists similar programs offered by that institution. Compare the current program with another program by clicking the name of the program you want to compare.

### Option 2: Comparing a Program to Different Programs at the Same Institution

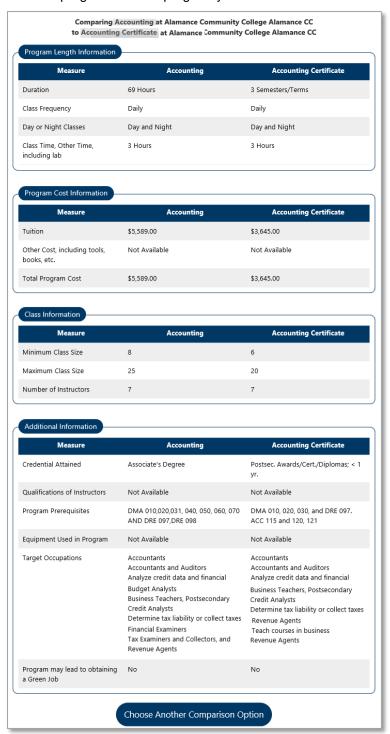
When you click the **Compare** button for the second option, a screen appears—similar to the following figure—that lists the other programs offered by that institution.



Program List Screen



From this screen, you can compare the current program with another program by clicking the name of the program that you wish to compare. A screen appears—similar to the following figure—that compares information about the current program with the program you selected.

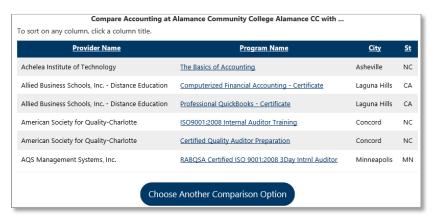


Program Comparison Screen

Option 3: Comparing a Program to a Similar Program at Other Institutions

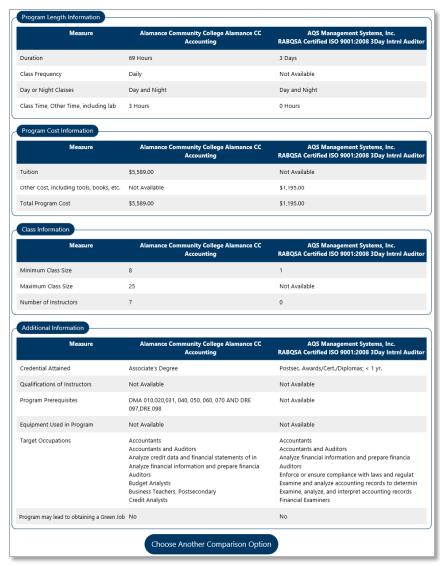
When you click the **Compare** button for the third option, a screen appears—similar to the following figure—that lists the institutions that offer similar programs.





Provider List Screen

To select a provider to compare against, click the program name for that provider. A screen appears—similar to the following figure—that compares the program from the current provider with the program of the selected provider.

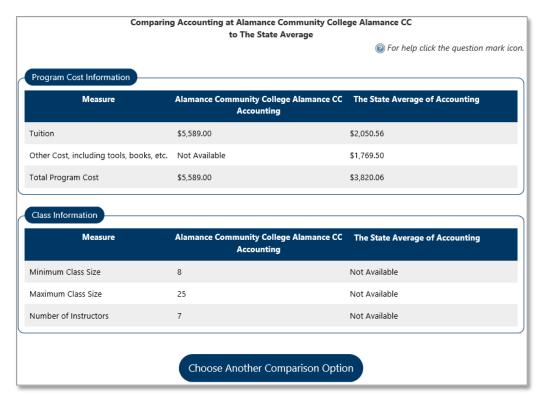


Program Comparison Screen



### Option 4: Comparing a Program with the State Average

When you click the **Compare** button for the fourth option, a screen appears—similar to the following figure—that lists the state average for this program. The following figure contains sample "test" data. Your screen will include complete data, if available, for the state averages.



Comparison with State Average Screen

## Training and Education Programs

The system also lets provider reps search for training programs by first finding specific training providers and schools (as indicated in the previous topics), and then displaying the programs they offer.

Based on provider reps' needs, they can also locate a specific training or educational program that is related to an occupation or field of interest, and then select the specific provider, and view the details for the program offered through that provider.

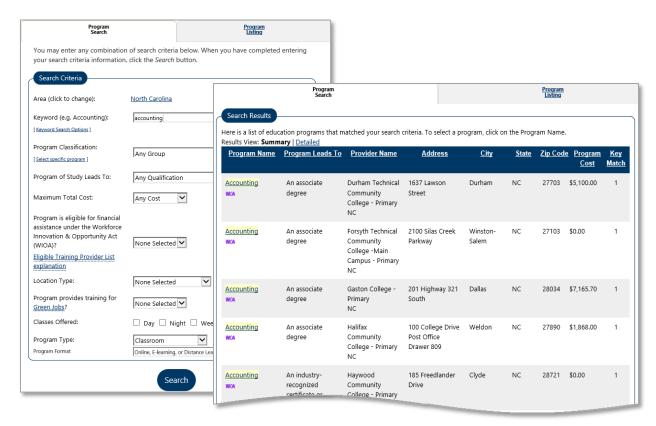
The following sub-topics discuss the search criteria and options for searching by program, and then viewing specific provider and program details, including viewing comparisons of programs.

### Search for Programs – Search Criteria

Click the Training and Education Programs link to locate a training or educational program that is related to your occupation or field of interest.

The following screen shows options for searching for a program.





Program Search Screen and Search Results (for a keyword search)

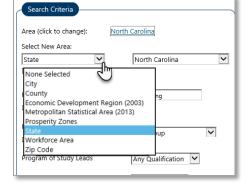
### Programs – Area Search Criteria

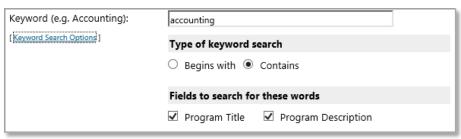
A sample of the Area options selectable for research criteria on this page are displayed at the right.

Click the <u>Area</u> link to select a new area, and then select the area from the Select New Area dropdown. Finally, select the specific area (e.g. county, city, etc.) from the dropdown or radio buttons displayed.

### Programs - Keyword Search Criteria

You can either just enter a keyword or phrase in the text box, or you can specify the type of keyword search by clicking on the <u>Keyword Search Options</u> link.





Select Program by Keyword



### Programs -Classification (CIP Codes by Dropdown or by Tabs)

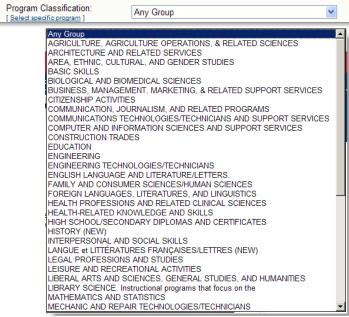
You can search for programs by classification (the CIP code). This can be done by selecting from the

drop-down list (as shown at right), or by finding the CIP code using a separate search window (i.e., CIP Code selection by Dropdown).

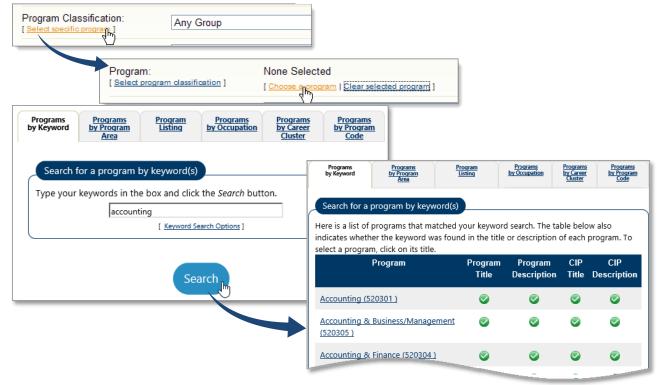
CIP Code selection by search window:

You can click the <u>Select program</u> <u>classification</u> link, and then the displayed <u>Choose a program</u> link, to see a separate window displaying multiple tabs for locating the desired program codes (each of which is covered in the next heading).

Choosing a CIP Program Search tab (such as Keyword), and then choosing a program selection corresponding to the CIP code, will populate the main Program Search screen with that CIP code selection, which can then be used to search for programs that are specifically associated with that CIP code. The figures below are an example of a CIP code search by keyword:



Select Program by Classification Dropdown



Select Program Classification (by Keyword



### **Programs Classifications – by Keyword Tab**

Type the keyword and click Search (as shown above) to see a list of related CIP code program designations. Click on the Program title to select the CIP code for you main program search.

### Programs Classifications – by Program Area Tab

Click the <u>Select program classification</u> link to select a program by the type of program area. The screen itself is a cascading tree. Click the "+" boxes and the screen will expand to show specific program titles defined by that program area. Click the "-"boxes and the screen will contract to show only program areas, similar to the following example. Click on the lowest Program title to select the CIP code for your main program search.

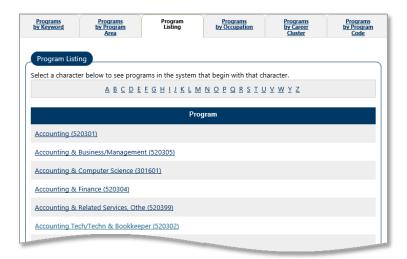


Select a Program by Program Area

Click the appropriate program area and program classification to populate the main Program Search screen and continue.

### **Programs Classifications – by Program Listing Tab**

Click the *Programs by Program Listing* tab to choose from a list of programs in alphabetical order, similar to the following example.



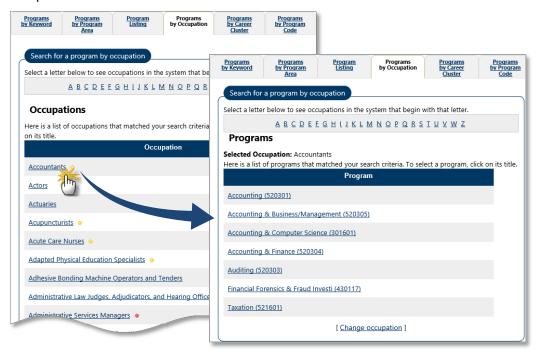


# Programs by Program Listing

Click the appropriate program classification to populate the main Program Search screen and continue.

# **Programs Classifications – by Occupation Tab**

Click the *Programs by Occupation* tab to select from the Occupation Code listing, drilling down to a specific occupation code.

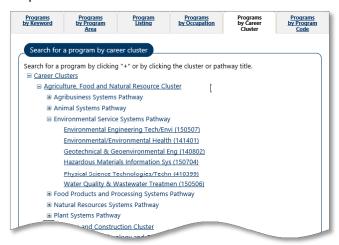


Programs by Occupation Code

Click the appropriate program title to populate the main Program Search screen and continue.

# **Programs Classifications – by Career Cluster Tab**

Click the *Programs by Career Cluster* tab to select a program by its career cluster title. The screen itself is a cascading tree. Click the "+" boxes and the screen will expand to show specific program titles defined by career cluster. Click the "-"boxes and the screen will contract to show only career cluster titles, similar to the following example.



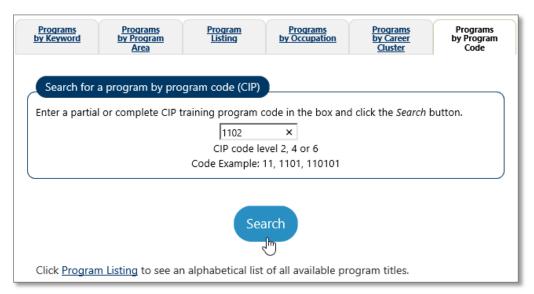


### Select a Program by Career Cluster

Click the appropriate career cluster to populate the main Program Search screen and continue.

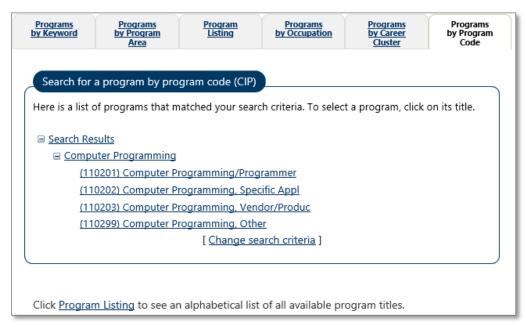
# **Programs Classifications – by Program Code Tab**

Click the *Programs by Program Code* tab to enter a complete or partial CIP code. Once the code is entered, click the **Search** button, as shown in the following example.



Programs by CIP Code Screen

Based on the full or partial code that is entered, a screen will indicate the various options. In the following example, CIP code 1102 was entered. The search results indicated there were computer programming matches. If any of these are what you are searching, click that link to display educational programs that fit.



CIP Program Search Screen



# Program Search by "Program of Study Lead To"

Individuals can search by program qualification using a drop-down to select the credential, skills gain, certificate, license of other measure tow which the program of study will lead.

Any Qualification

An industry-recognized certificate or certification

A certificate of completion of an apprenticeship

A license recognized by the State involved or the Federal Government

An associate degree

A baccalaureate degree

A community college certificate of completion

A secondary school diploma or its equivalent

Employment

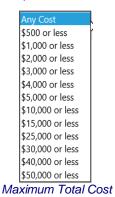
A measurable skills gain leading to a credential

A measurable skills gain leading to employment

Program of Study Leads To - Drop-Down

# Program Search by Maximum Total Cost

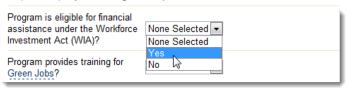
Individuals can search for programs by the maximum total cost, by clicking a drop-down selection from the list for total costs.



Drop-Down

# Program Search by WIOA Financial Assistance Eligibility

Individuals can search for programs that are eligible for financial assistance through the Workforce Investment Act (WIOA) by clicking a drop-down list.



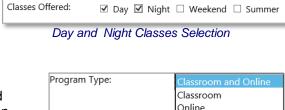
WIOA Financial Assistance Eligibility Drop-Down

# Search for Programs that Prepare for Green Jobs

Individuals can search for programs that provide training/certification for Green Jobs by selecting Yes or No from the drop-down list. Click the link to view the definition of <u>Green Jobs</u>.

# Program Search by Day or Night Classes

Individuals can search for programs based on the time of day classes are offered by checking boxes.



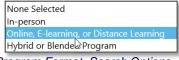
Program Search by Program Type

Individuals can search for programs that are Classroom and Online, Classroom only, or Online only by making a selection from the drop-down.

### Program Type Search Options

# **Program Format**

Individuals can search for programs that are Classroom and Online, Classroom only, or Online only by making a selection from the dropdown.

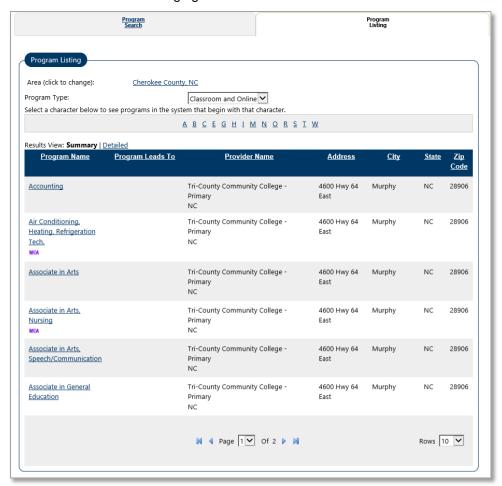


Program Format Search Options



# **Program Listing**

The system also offers individuals the option to search for education and training programs from a full list by selecting the area (described above), program type (described above), and the first letter of the program name as shown in the following figure.



Program Listing - Partial Display

# **Viewing Education Program Completers**

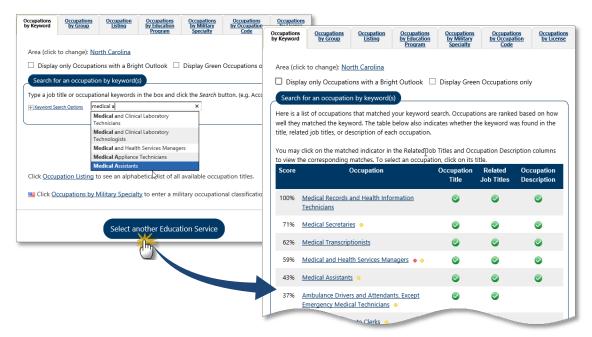
- ► To view education and training program completers:
  - Select Education Services > Education Program Completers from the Navigation menu.
    - OR -

Click **Education Program Completers** from the Education Services menu screen.

Select an occupational search screen. There are six different occupational search tabs that can be used: Occupations by Keyword, Occupations by Group, Occupation Listing, Occupations by Education Program, Occupations by Military Specialty, and Occupations by Occupation Code. See Appendix A - Common System Tools, for more information on searching for an occupation.

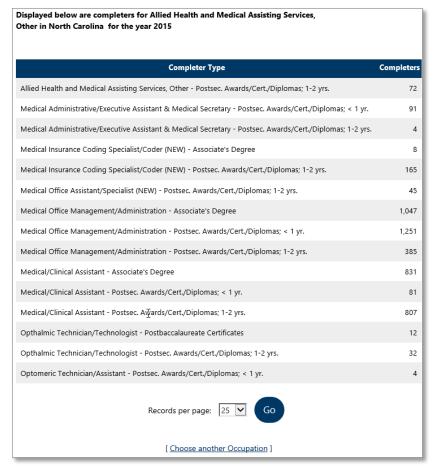
- Based on what you enter, possible titles may display, as shown at right:
- Based on your search, a list of related O\*NET occupational titles will appear. Those that are
  related to high growth industries with a greater probability of employment will have a *Bright*Outlook indicator next to their title. Click the occupation title that best fits your requirements.





Occupation Search Screen

 Once the occupation title is selected, the screen will display a list of completers (similar to the following figure):



Education Program Completers Screen



# **Accessing Online Learning Resources**

A page is provided with links to websites that offer a variety of free online learning and training courses that individuals can use to expand their knowledge and skills.

Click <u>Online Learning Resources</u> to view links that are grouped into sections for different workplace, education, or other learning resources groups, such as: <u>ALISON Online Learning</u>, <u>Workplace Skills</u>, <u>Education</u> (K-12 and College), <u>Business and Technology</u>, <u>Writing and Languages</u>, and <u>Miscellaneous</u>.



Sample Online Resource Page

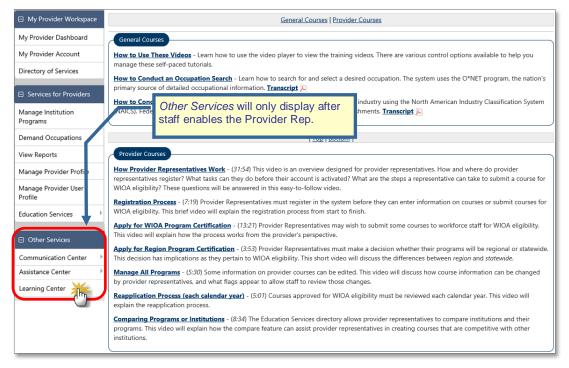


# 4: Provider Rep: Other Services

# **Chapter Contents**

Communications Center	4-2
Assistance Center	
About this Site	
Site Search	
My Preferences	
Email Your Questions	
Contact Us Directly	4-6
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The Other Services options allow the registered provider reps to communicate with staff, get assistance from staff or from other sources, and access Learning Center videos for the most up-to-date and detailed online videos describing how to perform common functions such as those covered in this user guide.



### Services for Provider Reps Menu

**Note:** Before staff update the provider user's access rights, they will have limited access, and will not be able to use the Communication Center or the Learning Center. (Depending on their site configuration, they may have Assistance Center access before staff updates their access rights.)

- **Communications Center** lets provider users view, manage, and reply to any messages received from workforce staff members.
- Assistance Center lets provider reps find assistance information about the system, such as settings and contact information.
- Learning Center This option provides menu selections to access training videos and tutorials specifically designed videos for provider user courses (e.g., Apply for WIOA Program Certification, Manage All Programs). The self-paced training provides detailed explanations on how to use the system



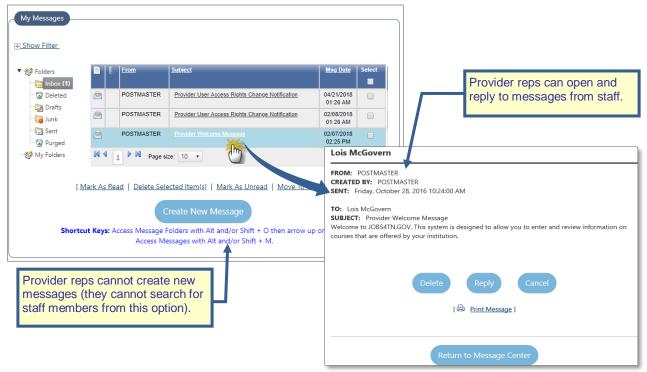
# **Communications Center**

The Communications Center lets provider reps read and respond to system messages from workforce staff. There is just one category in the Communications Center for provider reps, called *Message Center*, which is briefly described below.

### To use the Messages option:

• Select Communications Center • Messages Center from the menu.

The Messages screen displays and lists all the messages the user has received or sent and allows users to send new messages and delete messages.



My Messages Screen

A closed envelope indicates that the message has not been opened. An open envelope indicates that the message has been opened.

From the Messages screen, users can:

• Create new messages – Click the Create New Message button to create a new message.

**Note:** The message tools from the Message Center work identically for provider reps as they work for individuals, employers, or staff users in the Virtual OneStop system. However, provider reps are currently limited to replying to messages from staff. Provider reps cannot search and send messages other than as replies to the messages which staff send to them. If they click the **Create New Message** button, the options for searching for user types are disabled.

- Open Click the Subject link to open and read the message.
- Reply Open the message and click the Reply button to send a reply.
- View message folders View messages by type by selecting one of the folders on the left-side menu:
  - Inbox The Inbox holds messages that are currently active, both read and unread.
  - Deleted The Deleted folder holds messages that were received and deleted from the Inbox.



- Drafts The Drafts folder holds messages the user created, but has not sent.
- Junk The Junk folder holds messages that the system filtered as being questionable.
- Sent The Sent folder holds messages that the user sent.
- Sort Click a column heading to sort the message list by that column.
- Mark as Read Select messages by checking the corresponding boxes in the Select column and click the Mark as Read link at the bottom of the screen.
- **Delete** Click the checkbox next to the message(s) to be deleted then click the <u>Delete Selected</u> Item(s) link at the bottom of the screen.
- **Filter messages** Click the + <u>Show Filter Criteria</u> link to open the filter fields. Enter a date range in the *Date Range* fields (*From* date and *To* date) and click the <u>Filter</u> link. The screen will refresh, displaying only messages received during that date range. To clear the filter, click the Reset Filter link.



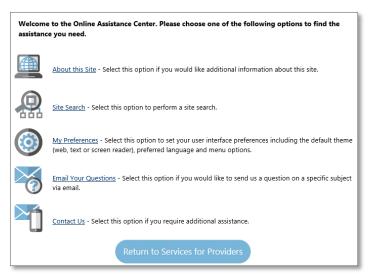
Message Filter

**Note:** If there are new or unread messages in the user's Inbox when the login, an alert pops up. Click **OK** to open the My Messages screen.

# **Assistance Center**

The Assistance Center gives provider reps access to a variety of general information about the system, including settings and preferences, and ways to contact system staff for assistance or to ask questions.

The Assistance Center can include four options, depending on your system's configuration, as shown in the following figure:



Assistance Center Options Screen

- About this Site Select this option to view additional information about this site, and its services.
- **Site Search** Select this option to view and select the settings you use when visiting this site. Settings may include graphics displayed, preferred language, and other menu options.
- **My Preferences** Select this option to view and select the settings you use when visiting this site. Settings may include graphics displayed, preferred language, and other menu options.

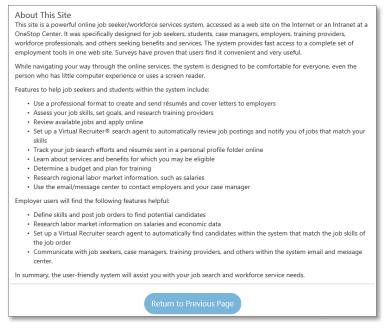


- **Email Your Questions** Select this option if you have a question about using the system. This area allows you to send an online message to system staff.
- Contact Us Select this option to access contact information for the system's help desk, a local
  office in your area, or all offices served by the system.

**Note:** For more details on each of these options, see the same Assistance Center options in the topic regarding the Assistance Center in the version 18 Virtual OneStop Individuals User Guide.

# About this Site

Click the **About this Site** link to view detailed information about the site and its services and features.

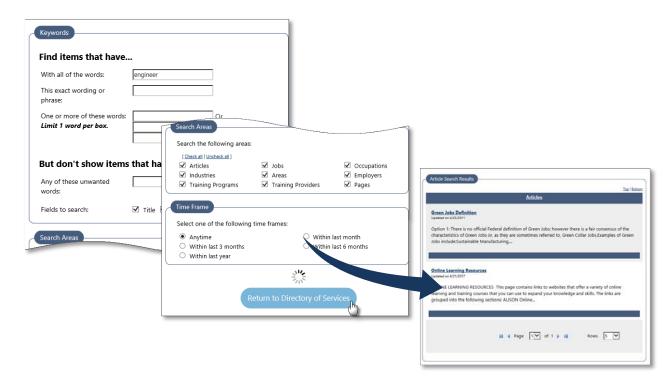


About this Site (Sample Page)

# Site Search

The Site Search option displays a page that allows provider reps to search their site for information. They can perform a search using a variety of keyword combinations using multiple search criteria. They can search through content on the site, as well as common tasks they can perform on the site (such as a job search).

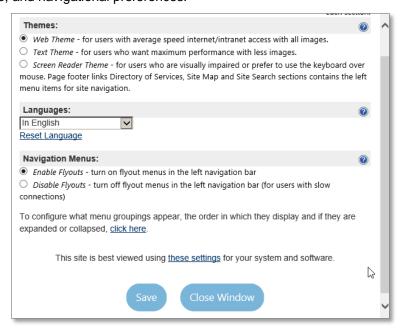




Site Search (Sample Page)

# My Preferences

Click the My Preferences link to set your user preferences for this system. Depending upon your system's configuration, you may be able to choose options for themes (graphics versus text-only), preferred language, and navigational preferences.

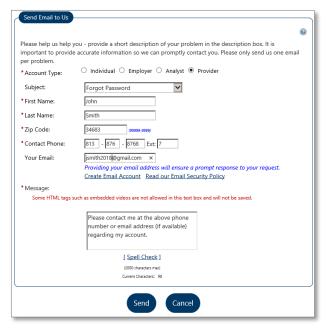


My Preferences Options Screen



# **Email Your Questions**

Click the <u>Email Your Questions</u> link to access an online form that allows you to submit a question to system staff.

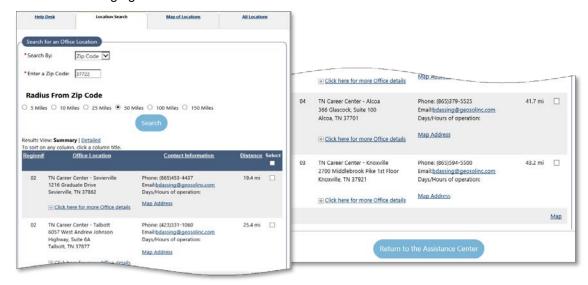


Email Your Questions Screen

# **Contact Us Directly**

Click the <u>Contact Us Directly</u> link to view contact information for the system's Help Desk (if applicable), the Location Search, Map of Location or All Locations.

The Location Search tab allows you to search for offices based on a ZIP code, county, or region, as shown in the following figure:



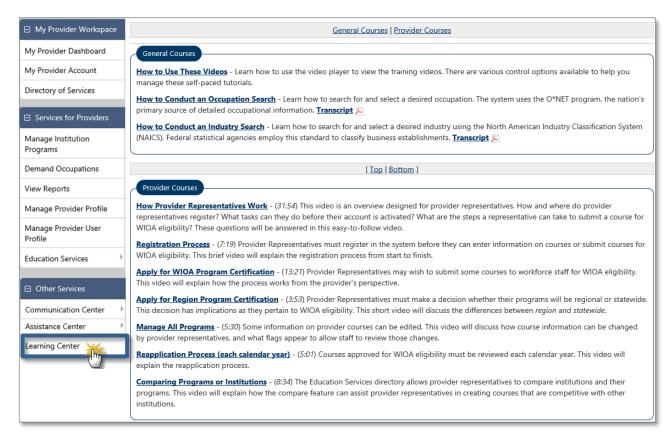
Contact Us Directly - Office Near You Tab - ZIP Code Search

Select a type of geography (ZIP Code, County, or Region) from the Search By drop-down list, then enter or select your specific area and click the **Search** button.



# **Learning Center (Provider Courses)**

The Learning Center gives provider reps access to several training videos. These videos provide both general assistance in using the system, as well as specific assistance for functions related to provider reps. These self-paced tutorials present detailed demonstrations to help provider reps take advantage of the various system resources available.



### Learning Center - Provider Courses

The first video in the Provider Courses group is a general video on how provider representatives work. Videos such as this are regularly added to the Learning Center, as well as added to the Learning Center. They are also reference with link, within the user guides, where practical, as indicated below.



The first video in the Provider Courses group discusses the Provider Representatives as key personnel associated with a given college or educational entity. This video helps explain many parts of the Representatives' capabilities. Click the link, <a href="How Provider Representatives Work">How Provider Representatives Work</a> to start the video, or view it from the Learning Center.

The courses listed on the right in the figure above, are recent, and may not be available yet in all providers' Learning Center lists. Therefore, they are also linked below as a further aid to provider representatives.

<u>Provider Representative Registration</u> – The video discusses the unique User Group called Provider Representatives, and how these key personnel are associated with a given college or educational entity. Provider Representatives are assigned the task of creating general provider profile information, course information (as well as tuition cost details), and other details. These provider representatives can



register in the system much like individuals and employers, and perform many of the functions that were once assigned to staff. This video will explain this initial process.

<u>Creating Provider Institution Programs</u> – This video discusses the lengthy process of creating courses and programs associated with the new institution. Once a provider representative has been enabled by an LWIA staff member, they can enter the system and create courses and programs related to their assigned institution. This video will examine the information-gathering fields that make up this step. What if the provider representative wants to submit a course for WIOA eligibility? What additional steps are involved in this process? This video will explain the WIOA eligibility process in detail.

Approving a Course for WIOA Eligibility – This video will show how workforce staff members can approve a course for WIOA eligibility after the provider representative has created it. If a provider representative submits a course for WIOA eligibility, what does a staff member do? What steps comprise the eligibility process? What settings will allow eligibility to happen, and which settings will deny eligibility? Once a course is approved, are there additional steps that are necessary before an individual can enroll in that course?

<u>WIOA Reapplication Process</u> – This video takes the eligibility process, and then looks forward. All WIOA eligible courses must be reviewed again at timely intervals. What is involved in the reapplication process, and how does the system notify staff members when a course is due for a new eligibility review? This video will examine that process.

Education Services – This video reviews another part of the California system called Education Services. Not all courses created by provider representatives are WIOA eligible. Course details can be created in the system for purely informational purposes. All course information created will become part of Education Services, a directory of educational institutions and the programs they offer. Individuals and employers who register in the system have access to this feature and can use it to make smart decisions on returning to school, or training priorities. This video will review this useful feature.



# 5: Initial Staff Provider Access

# **Chapter Contents**

Provider Staff Privileges Set by Administration	5-1
Summary of Manage Provider Menu Options	.5-2

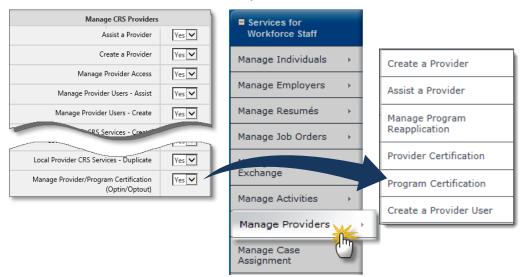
Unlike the Provider Users who register themselves, the workforce staff providers, who are given the abilities to create and manage providers, do not register for their provider capabilities. Their abilities are granted by an Administrator. This is true whether the provider system is part of a full Virtual OneStop system or a stand-alone installation of provider services. The range of available services and menu options available to staff who manage providers depends on both the configuration of the site/system, and the specific staff-privileges that are set for the provider staff by the administrator. The range of privileges and options is briefly described below.

# **Provider Staff Privileges Set by Administration**

A workforce staff member with Administrator privileges will need to set up the staff members and ensure that the correct privileges are set for the provider staff members who will have the access and capabilities to manage providers. These capabilities may range from creating and/or activating the provider institutions and the provider users, managing provider programs, to handling the opting in or out of specific WIOA-eligible programs and services at a local level.

Each of these privileges are in a *Manage CRS Providers* area in the Administration system. The appropriate administrator can set them up for new provider staff, or they can activate and control these capabilities as additional Provider services for existing workforce staff, to be accessible along with their other services.

The figure below shows a portion of the Admin privileges screen, and the menu options available to a provider staff member with all services turned on by the administrator.



Administrator's Provider Settings (through Staff Administration) and Staff Provider's corresponding Manage Provider Menu Options

**Note:** If you cannot access privileges that you should have as staff, contact your system administrator. For a brief indication of where these Admin privilege settings are accessed see Chapter 4 of the Administrator Guide. For a detailed explanation of all functions related to the Administrative side, please review the latest version of the Virtual OneStop System Administrator Guide.



# **Summary of Manage Provider Menu Options**

The menu options that staff can access from the main Manage Providers selection provides them with a full range of options for creating, managing, and/or assisting provider institutions and provider users.

Even for sites with a minimal configuration for provider services, when case management is part of Virtual OneStop, Manage Providers will include the first two options, which are used the most (to enable provider settings and manage the provider institution's programs): Create a Provider, and Assist a Provider.

Below is a brief description of each feature. All features are covered in more detail in the following chapters.

 Create a Provider (Institution) – This option lets staff create an institution – which is the first step that must occur before the institution can be enabled by staff and tied to a provider user (as part of enabling the provider user). The institution must also be created and enabled



before any of its programs or services can be created for the provider, reviewed and certified by provider staff, and ultimately be accessible to staff and end-users (e.g., as WIOA-eligible courses in which staff can enroll WIOA participants).

Staff enters or selects data in three screens to create a basic provider:

Provider Details (Section 1) Includes basic info like: active/inactive status, FEID/SSN, name and type of business, physical, billing, and mailing addresses.

Provider Type Details (Section 2) This shows a tree structure and lets staff select types of Contract Services (CS), Program Services (PS), and Support Services (SS) that can be added or maintained. Selecting correct types is necessary here for Add and Edit buttons to work on tabs in the Provider Programs folder, after the provider is created.

• CRS Provider Details (Section 3)

This section is required if the provider is identified as "state" (i.e., available for WIOA certification or federally funded program or services). It requires information for displaying online to the public and for state certification contacts.

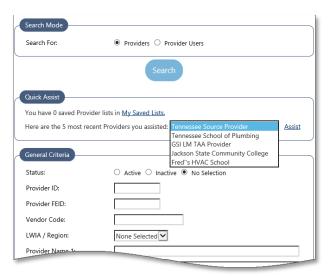
Some systems are configured to allow provider users to create the institution (as an additional part of their provider user registration). The fields for provider staff creating the institution are similar to those for provider users creating it.

Note: For some systems / states, provider staff will only verify the provider institution data, and

enable the provider (to then be associated with its provider user). For other systems / states, staff will create the provider institution, and they may even assist the provider to create and manage all of their programs and services.

For more details on creating the initial provider institution, see *Chapter 6: Create a Provider (Institution)*.

 Assist a Provider – This option is a quick, search tool to let staff select the provider institution, or the provider user, they want to assist (i.e., it is where staff goes to activate the provider institutions and the provider users associated with them). It is also a powerful





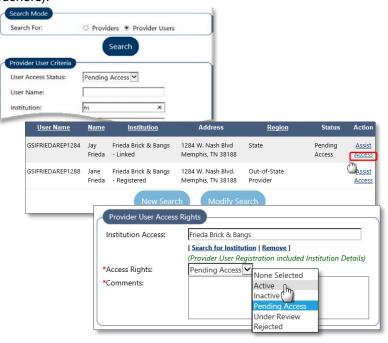
means of access to all the capabilities for managing both.

• Selecting a provider (institution) – staff can activate the institution from their General tab. They can also manage all other areas of their Provider Profile, as well as their Provider Programs (including support services and contracts, and their Provider Activities (e.g., enrollments, invoices, and vouchers).

Selecting a provider user (representative) – staff can review and adjust the provider user's access rights from the search results list. Using the Access link from this list is the only place that staff can adjust the access right, and activate them, or adjust the status while they are still under review.

Staff can also select the provider user/rep and use the same drop-downs as the provider user to control and manage the institution.

**Note:** When you assist as a staff member, you will



be able to see the provider folders and tree structure, whether you assist a provider institution, or a provider user.

For more details on activating or enabling the provider or provider user, see the topics in Chapter 7: Assist a Provider – Access for Institutions & Provider Users.

For more on managing the provider programs and services, see the topics in Chapter 8: Assist a Provider – Managing Programs.

- Manage Program Reapplication This option lets staff members review programs that are
  scheduled for periodic reapplication or review, through a screen in which they can filter programs
  by reapplication criteria. When they open the program from this screen, it opens the Program
  Review Details, from which they can identify the reapplication status and reapprove the program.
  For more details on reapplication, see the topics in Chapter 9: Managing Program Reapplication.
- Provider Certification This option lets regional staff search for any providers that are state
  WIOA eligible, and then opt in or opt out of certification related to those providers, which will apply
  just to that staff member's LWIA region.

For example, in Florida, provider staff connected with a Tampa LWIA region can opt out for a state provider located in Tampa and opt in for a state provider located in Tallahassee. This would mean that if case management in Tampa wanted to enroll a WIOA participant in a program offered by both providers, they would not have access to the Tampa provider, but would have access to the Tallahassee provider.

For more details, see Chapter 10: Provider Certification (Opt In/Out).

• **Program Certification** – This option lets regional staff search for specific program from providers that are state WIOA eligible, and then opt in or opt for certification related to the programs for those providers, which will apply just to that staff member's LWIA region



For example, provider staff connected with a Tampa LWIA region can opt out of a specific Nursing course for a state provider located in Tampa (because of local information about that course), and opt in for a state provider located in Tallahassee for a similar Nursing course. This would mean that if case management in Tampa wanted to enroll a WIOA participant in a Nursing program offered by both providers, they would not have access to the Tampa provider's Nursing course, but to all others. For that one course, they could have access to the Tallahassee provider's Nursing course (even though they might opt out of all other courses by the Tallahassee provider for enrollments in the Tampa LWIA.

For more details, see Chapter 10: Program Certification (Opt In/Out).

Create a Provider User – This option lets staff create a new provider user by following steps
identical to those performed by the provider user normally performing self-registration. Provider
users normally register themselves; therefore, this option is infrequently used and is the last
option listed on the menu.



# 6: Create a Provider (Institution)

	Chapter Contents	
Steps to Create th	e Provider Institution	6-1
Reviewing the Pr	ovider Profile Folders	6-4

An institution must be created before staff can activate it, link it to a provider user, and manage any programs or services for the provider. The institution is created by data entry in three general sections (shown below). The collected data from these sections becomes the General tab, which is part of the Provider Profile. At the end of creating the institution, the Provider Profile, and other folders and tabs will display, in a tree structure, for staff who are managing the provider.

Provid	er Profile	Provider Programs	Provider Activities
<u>General</u>		Program Services	<b>Enrollments</b>
<u>Locations</u>	Provider Details Provider Type Details	Support Services	<u>Invoices</u>
<u>Contacts</u>	CRS Provider Details	<u>Contracts</u>	<u>Vouchers</u>
Case Note	25	Education and Training Programs	
Documen	ts		

The institution must first be created with entries for three General Tab sections:

- Provider Details (Section 1)
- This includes basic information including: active/inactive status, FEID/SSN, name and type of business, physical, billing and mailing addresses.
- Provider TypeDetails (Section 2)

The tree structure lets staff select types of Contract Services (CS), Program Services (PS), and Support Services (SS) that can be added or maintained. Selecting the correct types is necessary here for the Add and Edit buttons to work on tabs in the Provider Programs folder, after the provider is created.

CRS Provider Details (Section 3) This section is required if a Provider Type PS - Public Display is selected. This is automatically selected when PS - Approved Provider Training - ITA, PS - Training Non-ITA, or PS - Non-ITA Occupational Skills is selected in Provider Type Details (i.e., available for WIOA certification or federally funded program or services). The section requires information for displaying online to the public and for state certification contacts.

# Steps to Create the Provider Institution

- ► To create a Provider Institution:
  - 1 Select the Manage Provider ▶ Create a Provider menu option.

A *New Provider Information* screen displays (as shown below), with blank areas for Provider Information, Billing Address, and Mailing Address.

**Note:** If you believe the provider already exists, use Assist a Provider to search for the provider before starting. This will avoid duplication of a provider already created (e.g., by other staff, or a provider user). See the next chapter, for more details on searching for an existing provider.

# **Provider Information (Section 1)**

- 2 Enter or select data in the Provider Information area.
  - Change the default status from Active to Inactive, if you do not want the provider to be active immediately.
  - Select the LWIA Region (select State if any courses are to be WIOA eligible).

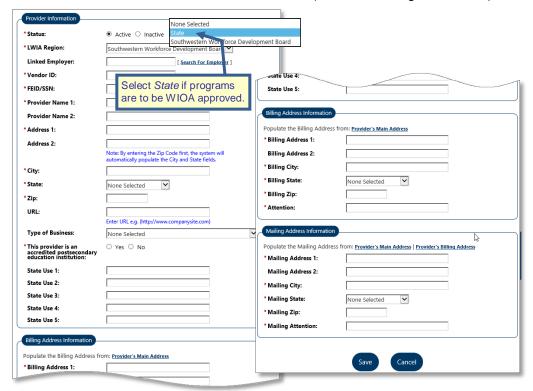


Only providers considered *State* provider can offer WIOA eligible courses. This selection must be *State*, if programs will be submitted for WIOA approval, and are to be accessible for staff-assisted enrollment of individuals for WIOA ITA-eligible programs and courses.

If this provider is associated with an employer, use the <u>Search for Employer</u> link to find and select the employer.

For example, if the provider is an employer that will provider On-the-Job training, you may be able to find the employer record, link that employer, and automatically update the screen with this employer-provider's primary address, website address, and FEID information.

- Enter a Vendor ID.
- Enter a FEID or SSN number.
- Review the fields in the Provider Information area (and make changes if needed).



- 3 Enter a billing address, and then the mailing address (using the Populate link or manual entry).
- 4 After you enter and review all base provider data, click **Save**.

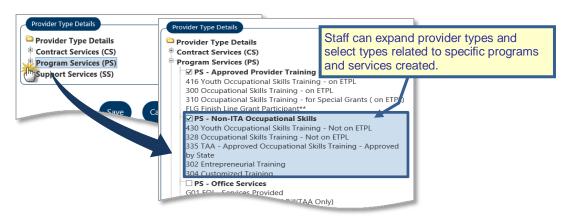
The Provider Type Details tree is displayed next.

**Note:** All fields on the screen are enabled for staff, and they will have access to the folder and files after creation. Staff-only fields on screens are disabled or hidden for provider users, as well as the folders. See the topic, "Creating the Institution (as a Registering Provider User)" in Chapter 2, for details.

### **Provider Type Details (Section 2)**

5 Expand the Provider Type groups to identify the appropriate types and related codes. When general groups are expanded, each type will display available service codes for the services associated with the provider types (as shown in the following example for "PS - Approved Provider Training – ITA"). The service codes for the provider types you select can later be related to enrollments in WIOA-eligible programs and services.





Provider Type Details Selection

6 Select the different types for which this provider will have programs, services or contracts created (by representatives or staff).

Note: If a displayed type is disabled (e.g., PS - Approved Provider Training – ITA), you may not have correctly selected State for LWIA region. PS-CRS does not display any service codes; CRS-only providers have no as options for federal program enrollments.

7 Click Save.

The CRS Provider Information screen is displayed.

# **CRS Provider Information (Section 3)**

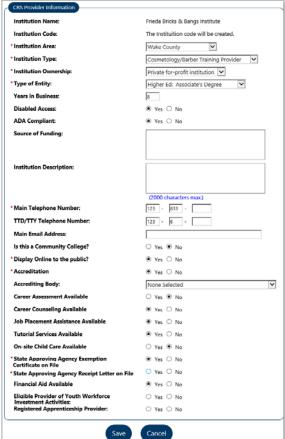
This screen is used to collect additional information that is needed before a program can be created and activated.

8 Review and answer all of the questions and prompts, as accurately as possible.

**Note:** Answer all required fields or questions as well as you can. Some specific prompts may be required which you may not know. E.g., Accreditation, if you click **No**, you can change this to **Yes** later when accreditation has been added

9 When you are done, click Save.

The system displays the General tab with all the information that you saved for the Provider Details, the Provider Type Details, and the CRS Provider Details.



After you create the institution, you may assist provider users at various levels. In some state sites, staff may only activate institutions and review/certify the programs per provider user requests. In most state sites, staff can perform a full range of provider management (e.g., updating institution data, creating programs, determining WIOA eligibility, certifying programs, and managing support services and contracts).

**Note:** Linking the provider user to their institution is part of providing access rights to the provider users (as indicated in the previous chapter).

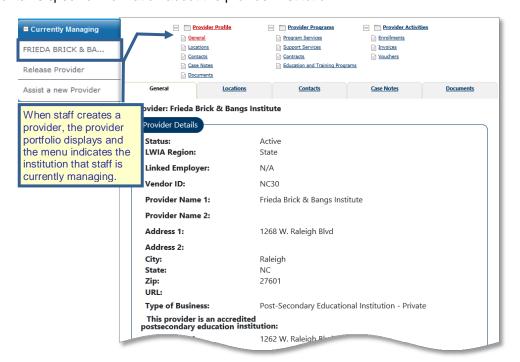




A Training Video for "<u>Creating a Provider</u>" is also available." See the topic, Learning Center (Provider Courses) in Chapter 4.

# Reviewing the Provider Profile Folders

When the screen refreshes (after saving all the new provider institution details), the three provider folders will display: *Provider Profile, Provider Programs, and Provider Activities*. Each of these profiles (shown below) contains specific information about the provider institution.



Sample Provider General Tab, Details Links, and Left Navigation Menu

Each of these profiles contains specific information about the provider:

- Provider Profile is a placeholder for general information about the provider, such as locations, contact persons, billing addresses, any general case notes, as well as specific documents scanned or uploaded for the provider (if the site includes the Documents module).
- Provider Programs is where all of the specific courses and programs are created, edited, and
  modified (as well as supports services, and any contracts related to the programs or support
  services).
  - Provider users can define their programs from the Education and Training Programs tab (which lists each program). Provider users can also open the programs to edit different areas, and to submit the programs for approval. Staff can review all areas of the programs and approve the programs (as they are submitted for WIOA review and approval).
- Provider Activities contains information on those who enrolled in the courses / programs that
  are created in Provider Programs folder (Enrollments tab). Staff can use the tab to review
  enrollments, and use links to access specific individuals and their Enrollments. Staff can also
  access the Invoices tab, and Vouchers tab to view and maintain data on the obligations,
  payments and refunds related to programs for the Provider/Institution.



# 7: Assist a Provider – Access for Institutions & Provider Users

# **Chapter Contents**

Activating a Provider Institution.		7-1
Enabling a Provider User's Acces	S	7-3
E	s Rights	
	/ Verifications for Provider Users	7-5

The option to Manage Providers > Assist a Provider opens a page to search for and select a provider (institution), or a provider user. This page is a search tool that allows staff members to find providers, or provider users, and select them from a displayed list of search results. Staff can then select the institution (or the provider user) that they want to assist, from the list of search results.

They can then activate the institution, review and enable provider users,

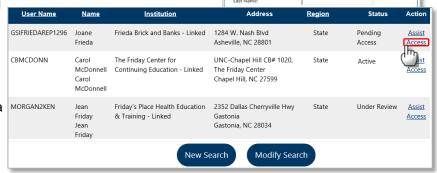
or perform more detailed and involved maintenance for each.

This search is used both to:

Provide Access – Staff can assist a provider to quickly review and/or activate the institution, or they can assist a provider user to enable access rights for that user (as shown in the sample search at right).

CBMCDONN

MORGANZKEN



Search For

First Name

Manage Provider's Folders/Data – Staff can access the full range of options, folders, and files
for the provider, or access the same menu options as the provider user, and manage their
capabilities and offerings.

Because of these distinct capabilities from this search, two separate chapters cover assistance with the capabilities that stem from this search tool. This chapter describes the *Assist Provider* ability, specifically to activate an institution or to review and enable a provider user.

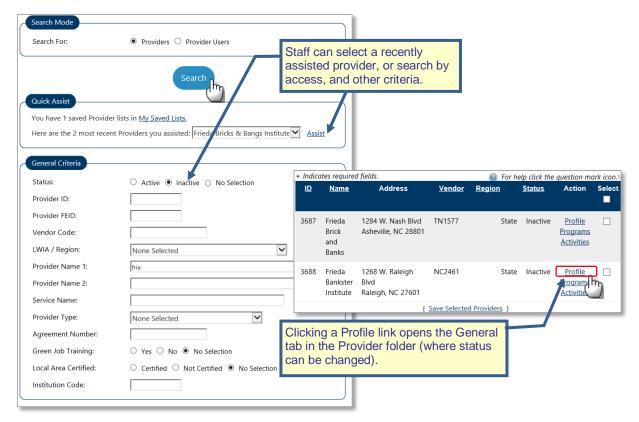
**Note:** The same initial search for assisting a provider is used in the next chapter, as the beginning of the abilities of managing programs and series for the provider.

# **Activating a Provider Institution**

The steps for verifying and enabling a registered provider user are simple:

- Select Assist a Provider to open the Provider Search screen.
- Enter a search criteria, to list the providers needing activation (e.g., search for *Inactive* status).
- From search results, click on a provider to open their Profile and their General tab.





Searching for Inactive Providers (with Partial Provider Name)

Open Provider Details, click the Active radio button, and then save the changes.
 The following steps elaborate on the four basic tasks indicated above.

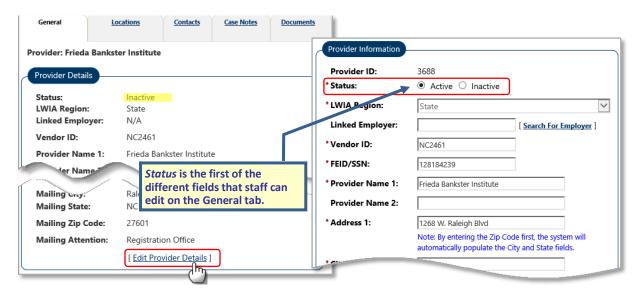
### ► To Find and Activate a Provider Institution

- 1 Select Manage Providers > Assist a Provider (from the left navigation menu).
- 2 From the search screen, identify the search criteria in the General Criteria section.
  For example, select *Inactive* in the first field, Provider Status, when you know the provider is inactive (as shown in the previous figure, along with a partial Vendor Name).
- 3 Click Search.

A list of provider institutions is displayed, including vendor code, region, and current status.

- 4 Click the <u>Profile</u> link (in the Action column) for the provider you want to activate.
- 5 From the displayed General Tab (shown in the next figure):
  - ◆ Click the Edit Profile Details link to open and adjust Provider Information for the institution.
  - Select a status of Active (click the Active radio button).
  - Make any other needed changes in the Provider Information area.





Activating a Provider: Changing the Status in the General Tab

6 Click Save (at the bottom of the screen).
The data is saved and the General tab of Provider Profile is redisplayed.

# **Enabling a Provider User's Access**

After a provider user registers, the next step is for staff to verify the registration information of the new provider user.

The steps for verifying and enabling a registered provider user are simple:

- 1 Select Assist a Provider to search and locate the provider user(s) pending access.
- 2 Click the Edit link for a provider user select from search results.
- 3 From the displayed Access Rights screen (shown on the next page), identify and verify the linked institution, update the user's access rights, comment on their review/access, and then save the changes.

The following steps elaborate on the three basic tasks indicated above.

- To find, review, and enable Provider Users (change their access rights)
  - 1 Select **Providers** Assist a **Provider** (from the left navigation menu).
  - 2 From the search screen, select the Provider Users radio button (this changes fields to Provider User criteria).
  - 3 Use search criteria to find the provider user.

For example, select Access Status of *Pending Access* and enter a partial Institution name (as shown in the following figure).

**Note:** New registrants who are pending access will display as "Out-of-State providers" until they have a linked institution.

4 Click Search.

A list of users meeting your criteria is displayed, including their institution name and current access status.





Search for Provider Users Pending Access

- 5 Click the <u>Access</u> link for the Provider User in the search results for the user whose access you want to update. This displays the Provider User Access Rights area.
- 6 Use the Access Rights drop-down to change the status to Active.



Assist a Provider: Pending Access Provider User Results and Access Rights

- 7 Enter applicable comments.
- 8 Click the Save button.

The data is saved and the *Services for Provider* screen is displayed for the provider user (i.e., the same as if staff had clicked on the username from search results in assisting a provider).

**Note:** From the displayed Access Rights area, (shown below) you can also change the linked institution, or add/change comments regarding the access.

# **Additional Notes on Access Rights**

The Access Rights screen contains two sections. The top section contains basic information collected during the registration process, such as *User Name* and *Contact Name*. Not all fields will be complete; it is dependent on the information volunteered at the time of registration. Staff can review the entire registration form by clicking the View Registration link in the center of the screen.

Staff must complete required fields in the bottom section of the form:



If the provider user is associated with an existing registered provider, the Institution Access field will allow staff to select the provider from a drop-down list. If the drop-down is empty, no appropriate, active providers are available for association.

- This field is required if Access Rights are set to Active.
- Based on the choices made in the Access Rights drop-down, staff will be required to enter freeform text comments in the Comments textbox, which is a required field. The information that is entered in Comments may be an office determination.
- Staff can also change the status of an active provider to some status other than *Active*. This will limit their ability to modify or add anything in their provider profile.

# When to Perform Reviews / Verifications for Provider Users

The timing for when to perform your staff reviews and verifications of provider users can be more complicated, and depends on your local workforce standards and procedures.

A specific staff member may be assigned to verify and enable these registrations, or they may be handled by multiple staff members responsible for managing other provider services.

Depending on how your system's provider staff members are configured, the appropriate provider staff will automatically receive system notifications through the *Message Center* when new provider users have registered. These notifications will allow for quick response time. An example of what an automatic mail message notification for newly registered provider users may look is indicated to the right.

Staff can review provider users as they receive notifications, or they can periodically conduct a search (e.g., for registrants who are Pending Access, Under Review, or Inactive).

Subject: Provider User The Employ Florida s	-		iew providers	s listed below.
New Provider(s) User	Institution	New Institution	Date Registered	
<b>3278 Bob Fob</b> 123 Main St. Dunedin, FL 34698 (222) 555-5555	Accounting U	No	05/22/2014	
2897 Ace Train 321 Oak Dr. Dunedin, FL 34698 (727) 555-5555	ACA Training	No	01/08/2014	

Auto-Notification Email for Recently Registered
Provider Users

like to unsubscribe to all emails from Employ Florida 14.0, Click Here.



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# 8: Staff User: Assist a Provider – Managing Programs

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Staff assisting a provider, and helping to manage their program may perform one or all of the following functions, covered in more detail in this chapter:

- Add Programs/Courses
- Approve Programs Courses for WIOA eligibility
- Manage WIOA Program Reapplication
- Edit Existing Programs

# **Accessing Programs (via the E&T Programs Tab)**

Whether you are a staff member who is creating a new program for a provider, editing a program, or reviewing a program to change its status (to review or reject the program changes), you do each of these tasks by accessing the *Education & Training* 

(E&T) Program Wizard, via the Education & Training Programs tab. This is a tab under the Provider Programs folder in a provider's portfolio.

The Education & Training Programs tab displays all the programs created for a provider. This includes programs started, but not yet approved, as well as programs that are already approved (but which may change, or be reviewed for reapproval). The tab lists any programs approved or in progress for approval, and



has an **Add Education of Training Program** button to create any new programs (as shown in the next figure).

Staff can access the E&T tab in two ways. Both ways start with selecting the menu option, **Manage Providers** • **Assist a Provider**. Then staff searches for and selects the provider, and then opens the E&T tab, to manage their programs.



In other words, the two paths to access the programs are:

 Assist a Provider ▶ Providers Search Mode (Institutions) ▶ Click Programs link ▶ Click on Education & Training Programs tab

If staff enters a search criteria for provider institutions, the providers in the search results will display a <u>Programs</u> link. This opens the Provider Programs tabs, and staff can then click on the E&T tab.

Assist a Provider ▶ Provider Users Search Mode ▶ Click Assist link
 ▶ Click on Manage Institution Programs menu option

If staff enter a search criteria for provider users, then the provider users in the search results display an <u>Assist</u> link. This displays the **Services for Provider Users** menu. Staff can click on the Manage Institution Programs option to go to the E&T tab.

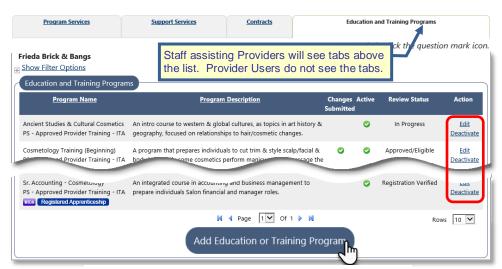
**Note:** See Chapter 1, Overview & Quick Summary, for more on how you can find provider institutions, or provider users, and access options for them.



# **Adding/Managing Programs/Courses**

Regardless of the path staff uses to access the E&T tab, under the Provider Programs folder, the tab will let staff see a list of each of the programs (as shown in the figure below). The list includes an <u>Edit</u> link to open each program for changes (via a multi-tab E&T SSEP Program wizard). The list also has an Add button below it, to start the E&T wizard, in a step-by-step mode for creating a new program.

Staff can use a drop-down filter above the table to list only the courses that are *Active*, *Inactive*, or *All*. They can also filter by the Education Program Type (e.g., Approved Provider Training – ITA, Training – Non-ITA), and Approval Status, as indicated in the note on the next page.



The E&T Programs List (to view, add, or maintain programs)

The displayed programs that are listed on the screen will include columns for:

- **Program Name** This column includes additional indicator icons (e.g., for WIOA approval, or for a Registered Apprenticeship, or a program nearing its REAPP Subsequent Review due date).
- **Program Description** The entered description (supplied on the first, General Information tab in the program creation wizard).
- Changes Submitted Indicating if changes have been submitted since the last review/approval.
- **Review/Approval Status** The current status of program creations and staff review (e.g., In Progress, Pending, Approved/Eligible, Rejected, Registration Verified).



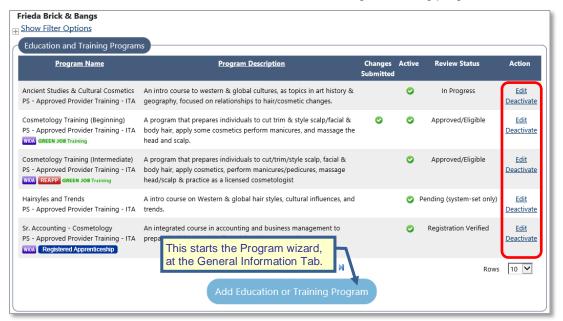
- Action From this column, you can click link to:
  - Edit opens the program to the first tab, General Information. The tabs available in edit mode, for all fields or controls available to the Provider user.
  - Deactivate this link deactivates a program.

Note: You will see a 

Show Filter Options control above the programs list. You can expand this control to filter longer lists, based on Status (Active or Inactive), Edu. Program Type, Edu. Program Name, Registered Apprenticeship, Changes Submitted, and Review Status. In other words, you can list only programs that are Active, or Inactive. You can also filter by the Program Type (e.g., Approved Provider Training − ITA, Training − Non-ITA), and/or by the Approval Status (e.g., Rejected, Pending, Approved, In Progress).

Staff assisting Providers will also see tabs of the Portfolio tree, above the programs list, for areas used only by staff. Staff see more filter selections than the Provider Users see.

The **Add Education or Training Program** button (below the Programs list) starts the creation of a new program. The screens and sections work the same for both creating and editing programs.



The Education and Training Programs Tab (used to add or edit programs)

The following topic and sub-topics summarize each part of the program creation process, ending with the application confirmation, submitting the program for WIOA approval and certification by staff.

# Adding a New Program (as Staff)

When staff assist a provider, they can start from the first tab, with steps/tabs identical to how a provider user would add the program. Start by clicking the **Add** button (displayed below the Programs list). The button starts the creation of a new program via a Program wizard that walks you through multiple entry tabs for the program.

### To Add a New Program:

- 1 Click the Add Education or Training Program button, at the bottom of the list.
  - This launches the E&T Program wizard. The wizard guides you through required data entry of each separate progress step (or tab) for entering the segments of data that define the program. You start with the General Information tab.
- 2 Move through each segment/tab, and enter all required data.



Each of the segments/tabs is listed in the *E & T Program Tabs* table below. Details for each of the tabs are described in separate topics following the *SSEP Program Tabs* table (from the *General Information Tab* on page 8-6, to the *Confirmation Tab* on page 8-25).

Note: You may start entry of a program, leave the wizard, and return later. When you reenter the program wizard, tabs will display rather than the green Progress Bar segments that displayed during the initial entry.

When staff member (or the Provider User) reaches the Confirmation tab, and enters the *Confirm* and *Submit* acceptance/statement, you will see the Review tab. Staff with appropriate privileges will use this tab to review and approve the program.

Each of the steps/tabs are briefly described in the table below, followed by a detailed topic for each tab.

**Note:** The tab titles in the table below are links to the full topic for each tab. The use of these tabs, and the description of them, are very similar for Staff (described in this chapter) as for Provider Users (described in chapter 3). Specifics for staff will be included in this chapter. Refer to chapter 3 if you need more details on a program tab, which may not be specific to staff.

# 8-1 Tabs of the E&T Program Wizard

General Information Tab	This tab lets provider users enter basic data about the program, associate it with a CIP code, and indicate any licenses, certificates, degrees, or credentials related to the completed program. You must complete this tab to list the course (i.e., to see it in the programs list), and to complete/edit the other tabs (now or later).
Apprenticeship Tab	This tab shows one prompt, "This program is an Apprenticeship" It defaults to <b>No</b> . If you click <b>Yes</b> , the prompt "This Education Program is a <u>Registered</u> Apprenticeship," displays. If this response is <b>No</b> to either prompt, you can simply click, <b>Next</b> .
	If you pick <b>Yes</b> for both, several fields display to identify the apprenticeship registration data. If instruction for the apprenticeship is provided by another provider (i.e., not by this institution), even more Instruction Provider fields will display.
	A Registered Apprenticeship does not require details in most of the other tabs. Once apprenticeship details are entered, you can click <b>Next</b> to quickly step through most tabs (without data entry). If you jump to the Confirmation tab, you will see the minimum needed data (e.g., "Missing required data on Locations and Cost Details tabs").
Additional Details Tab	Numerous fields on this tab are configurable (e.g., Target Audience, Accessibility).
	This tab lets users add details on financial aid, program prerequisites, institution URL, why this is a new program, class size limits, instructor qualifications, equipment used in the program, etc. It may include other configurable fields, such as grievance and refund policies (and always includes other State Use fields).
Curriculum Tab	This tab can be configured to display, or not display on the wizard.
	This tab lets users identify one or more curriculum items for the program. Adding a curriculum includes two fields: a curriculum code and course title.
Occupations Tab	This tab lets users identify occupations to be associated with the program, by selecting from a Related Occupations list (based on the CIP code from the General tab, or by searching for other occupation codes, if necessary).
Occupation Skills Tab	This tab lets users identify occupation skills acquired from the training program.  Selection is from a standard 14-category list of standard O*NET occupation skills.



Completion Expectations Tab	The display of this tab is configurable (as well as multiple fields on it). If all fields are Off, the tab will not display.
	This tab lets providers define some common course parameters that identify expectations, related to completion of the program. No fields on this tab are required for WIOA and Federal reporting.
Scheduling Tab	This tab has 2 sections: <i>Course Time</i> lets you define hours in class time, lab time, other time, and frequency. <i>Reporting Info</i> requires you to identify the program format (inperson, on-line, hybrid) and the total program length (in hours and in weeks). Reporting Info is required for WIOA reporting.
<u>Duration Tab</u>	This tab lets users define one or more durations for the program (e.g., part-time for three semesters, or full-time, intensive summer course) At least one <i>primary</i> duration is required when the site is configured to require duration.
<u>Locations Tab</u>	This tab displays a list of provider locations from which the user picks where the program will be provided (locations are not entered, only selected for the program).
External Approvals Tab	This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard.
100	Fields on this tab are used to identify state and/or local approving agencies, or other approval data. (In most sites, this tab does not show.)
Cost Details Tab	This tab lets users enter cost details for the program for a standard cost structure (e.g., tuition/fees, books, tools, and other costs). Cost details are required for a standard program submitted for ETPL approval but may be set to \$0.00.
Provider Representative Tab	This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard.
	This tab identifies a "Provider User" as the representative to contact for information related to the program. It may include the application signed and received dates specific to the user. (In most sites, this tab does not show.)
Performance Tab	This tab is configured to let you either: (A) enter performance data per individual (by their SSN), or (B) enter aggregate data (per program year). Some fields for the Performance Year entry method are also configurable, per site/customer.
	This tab is used for recording key performance data, used in reviews to determine if the program is included on the ETPL list. Provider users will normally only have one choice of Program Year (if configured to enter aggregate data by year).
Confirmation Tab	This is the last tab that the provider user completes to submit the application for WIOA Approval (by staff). It contains a simple agreement statement, along with two radio buttons: "Yes, I agree submit for WIOA approval," and "No, do not submit for WIOA approval at this time." The user will:
	Select <i>Yes,</i> if they want to proceed and submit the data in the previous tabs for WIOA approval (or re-approval).
	Select <i>No</i> , if they want to continue and simply save all data entered so far.
	<b>Note:</b> Other options display for Registered Apprenticeship ITA programs, or for Non-ITA programs
	Red error messages display at the top of this tab to indicate any incomplete required fields on previous tabs. The user cannot proceed (i.e., click <b>Next</b> ) until those fields are completed.



# This tab is primarily for staff users. It lets staff monitor/adjust the review status as they review program/course changes, and perform reviews to approve a program's application (or reapplication) for WIOA eligibility. Staff can see a table of records for each review of a change, or a WIOA application, along with the status, and they can edit certain statuses from this table. Providers can also use the tab to view the current status of their program's review, who reviewed it, and when.

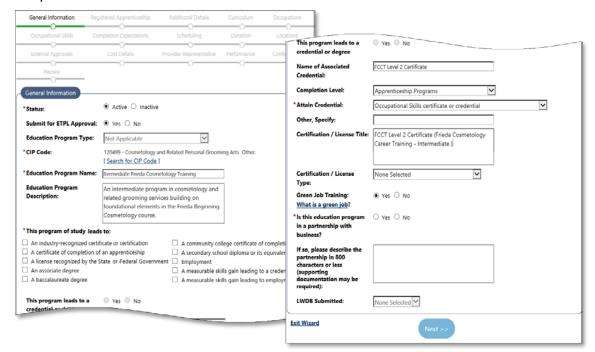
**New wizard note:** If you are familiar with the previous forms for adding a program, but new to the E & T Program wizard, you will see that fields are divided into more distinct segments/tabs. For example, portions of the old Program/Service Details area are now in separate tabs (General Information, Additional Details, Scheduling, and Duration tabs).

# **General Information Tab**

The first step/tab that displays is General Information. This tab (shown below) contains several text-entry fields and drop-down fields to describe and classify the program/course.

Complete all required entries to classify the program:

- Indicate Active or Inactive with the radio button. Only appropriate staff should determine when a
  program is marked Active.
- Select Yes or No for Submit for ETPL Approval (i.e., for WIOA certification).
   Yes indicates the program will be submitted for certification (to include in state ETPL).
   No means it is not considered for WIOA, only listed with a provider's available courses when looking up the provider under Education Services.
- Education Program Type must be selected. This field is required for staff and disabled for the provider user.



General Information Tab (Base Program Classification Details)



• Use the Search for CIP Code link to assign a CIP Code for the program/course.

Select the code that best describes the course. The Search Screen will then disappear. The CIP code title and description will display in the appropriate fields. (See ①, for more notes.)

- Enter an Educational Program Name.
- Enter/edit the Educational Program Description.
   A description is pre-populated from the CIP Code and may be edited.

# **Program of Study Leads to:**

 Check one or more boxes for each of the certificates, diplomas, credentials, and/or degrees to which completing this program of study will lead.

# Program Leads to a Credential or Degree:

There are several additional fields related to a possible credential, degree, certificate, or license. Two of these fields are required.

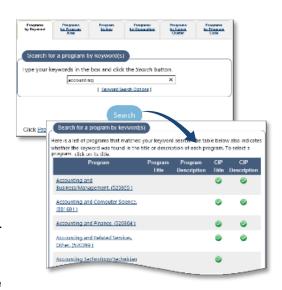
- Select Yes or No for whether the program leads to a credential or a degree (required).
- Enter the name of any associated credential.
- Select the correct Completion Level from the list of choices in the drop-down.
- If participants attain a credential upon program completion, indicate the type of credential from the drop-down options. There are a wide range of options. Select carefully.

**Note:** Attain Credential is a configurable field (normally it is required). If you choose "Other" from the Attain Credential drop-down, then the next two fields may also be required.

- Other, Specify Enter a specific credential name or another credential identification.
- Certification/License Title Enter the full name or title of the Certificate or License.
- Enter a name in the Certification/License Title box, if applicable.
- Select the general type of *Certification/License Title* from the drop-down (e.g., National, State, Regional).
- Indicate whether the course offers Green Job Training.
  - The link, What is a Green Job?, can assist providers in understanding whether the course prepares completers for a Green Job or not.
- Select Yes or No to indicate if this program is in a partnership with a business.
  - If you select Yes, the description field is required.
- The LWDB Submitted response is selected by state staff. It is auto-populated when local staff enters program data.
- When all data is complete, click the Next>> button.
   If all required field entries are valid, the next tab, Registered Apprenticeship tab will display.

# More Notes – General Information Tab

**Required Fields\*:** Throughout the wizard, required fields have a red asterisk (\*). If they are incomplete when you click **Next>>**, red errors above the tab will indicate the fields with missing or incorrect entry.





**Initial Save:** Once the first tab is saved, the basic program is added. If you exit the wizard, you will see it in the E&T program list. However, the program is still incomplete and not eligible to apply for WIOA certification at this point. You can return to the wizard, and continue adding details.

**Education Program Name:** Staff can identify the name for a specific program type (e.g., PS – Approved Provider Training – ITA). This selection is necessary for WIOA approval.

**CIP Code:** The CIP code is used as a cross-walk to control O\*NET occupations can be related to this program/course in later definitions. Once it is selected, the Program Description will pre-fill with related CIP information.

The Classification of Instructional Programs (CIP) code groups programs for accurate tracking, assessment, and reporting of fields of study and program completions. You can locate the CIP code six different ways: by a keyword, by program area, by an alphabetical list, by O\*NET occupation, by career clusters, or by CIP program codes.

# **Apprenticeship Tab**

When you first click **Next>>** from the General Information tab, the data is saved and the Registered Apprenticeship tab is displayed.

Note: This first save from the General information tab creates a record for the program (that means if you log out and return, the record will display in your list of programs). Also, the Registered Apprenticeship tab and subsequent tabs will display completed header information in an Education Program Information area (above progress bar) with Provider, program name, a service ID (system generated number), and the CIP Code.

The Apprenticeship tab initially displays only one prompt, This Program is an Apprenticeship. The **No** radio button is selected as the default.

- ► If the program is <u>not</u> an apprenticeship (which most programs are not):
  - Click the Next>> button.

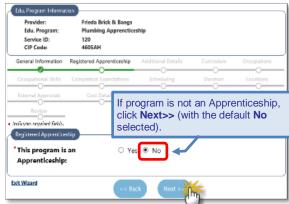
### If the program is an apprenticeship:

- Select the **Yes** radio button.
   This displays a second prompt, *This program is a Registered Apprenticeship*
- If no, click the Next>> button.
   There is nothing else to do on this tab. The next tab will display Additional Details.

# ▶ If the program is a registered apprenticeship:

Select the Yes radio button.

This displays several additional fields, most of which are required.



Registered Apprenticeship Tab (Default prompt = No)







Registered Apprenticeship Tab (with "Yes" selected)

Enter the appropriate information for each field:

#### **Registered Apprenticeship Area**

Apprenticeship Registration Date: Enter the original start date of the apprenticeship.

**Note:** This is the date that the apprenticeship program first became "a registered apprenticeship,". The date must be in the past.

- Apprenticeship Description: Enter narrative text to describe the apprenticeship.
- Number of Active apprentices: The number of currently active apprentices in this program.
   (This is the only optional field on this tab.)
- Instruction Method: Select the instruction method (i.e., In-Person, Online, or Hybrid).
- Instruction Length in Weeks: Enter how many weeks will occur in the period of instruction for the apprenticeship.
- Technical instruction is provider by another provider: Select Yes, or No.

If Yes, an additional Instruction Provider area is displayed.

#### **Instruction Provider Area**

 Enter the name, address, city, state and zip code of the other provider who also provides technical instruction.

**Note:** If you enter the zip code first, the system will automatically populate the city and state.

When all data is complete, click the Next>> button.
 If all required field entries are valid, the Additional Details tab will display. Most tabs will not require details for the Registered Apprenticeship. (See ①, for more notes.)

### More Notes – Registered Apprenticeship Tab

Additional Tabs: For a Registered Apprenticeship program, none of the fields on the next Additional Details tab, or on most of the following tabs, will be \*Required fields. If you leave the wizard, and return, you will be able to click directly on the Confirmation tab.



The top of that tab will indicate any required information still needed. For example, an Occupation is always required, and Cost Details are required if you selected "Yes" for "Technical instruction is provided by another provider." The Confirmation Tab would show messages as indicate in the sample figure at the right.



**The General tab**: For a Registered Apprenticeship program, also consider rechecking two fields on the previous, General tab:

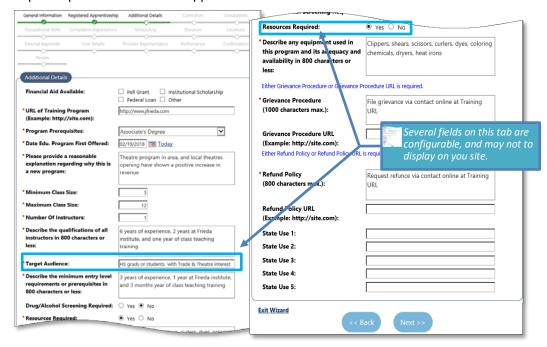
- The check box for "A certificate of completion of an apprenticeship." This may apply for a Registered Apprenticeship program.
- The question '1s this education program in a partnership with a business?" If this apprenticeship is through a business, then the answer should be "Yes," followed by a description.

#### **Additional Details Tab**

The Additional Details tab has several fields for entering available financial aid, program prerequisites, class size limits, instructor qualifications, grievance and refund policies, and other information.

On the Additional Details tab:

- Complete all required entries (at minimum).
- Complete optional fields where applicable.



Additional Details Tab (Base Program Classification Details)

- Financial Aid Available: Check the appropriate boxes. (Optional.)
- URL of Training Program: A URL is required (even if it is the primary URL of the provider.
- **Program Prerequisites:** Select a level of education that is a prerequisite. *None* is a valid selection, but a selection is required.



- **Date Edu. Program First offered:** Select the date the program is (or was) first offered by the institution (not the date you are entering this program).
- **Provide an explanation of why this is a new program**: Enter a short description of why this new program is being added (i.e., the need or demand for the program).
- Minimum Class Size: The minimum students that must enroll for a class to take place.
- Maximum Class Size: The maximum number of students allowed to enroll in a single class.
- Number of instructors: The number of instructors available for the program.
- Describe the qualifications of all instructors: Indicate qualifications (e.g., teaching experience, work experience, education level) for an instructor (up to 800 characters.)
- Target Audience: Enter a brief description of the target audience, or typical source of students (e.g., this may be the level of education plus a specific interest or aptitude).
- Several fields on this tab are configurable. E.g., Target Audience, as well as Resources Required, may or may not display or your site, and may not be required if displayed.
- Describe the minimum entry level requirements or prerequisites: Indicate any minimum requirements or prerequisites of the participants (use up to 800 characters). E.g., for an advanced accounting course, provider might indicate that Accounting 101 comes first).
- Drug/Alcohol Screening Required: This is defaulted to No.
- Resources required: Click Yes if any specific resources are required (specific tools, access to computers, equipment, etc.).
- Describe any Equipment used, its adequacy and availability. Briefly describe or list any
  equipment that will be used, its availability, and if it is required for student to provide, indicate
  the required adequacy of equipment, if appropriate. (Use up to 800 characters.)
- **Grievance Procedure:** A brief description of the method to file a grievance connected to the program, or a URL for the site that lists such method/procedures for a grievance, is required.
- Grievance Procedure URL: If a description of Grievance Procedure is not included, a URL is required when the site is configured to require a grievance procedure.
- **Refund Policy:** A brief description of the policies for being eligible for a refund connected to the program, or a URL for the site that lists the refund policies is required.
- Refund Policy URL: If description of Grievance Procedure is not included, a URL is required when the site is configured to require a refund policy.
- When all data is complete, click the Next>> button.

If all required field entries are valid, the Curriculum tab will display.

**Note:** Required fields have a red asterisk (\*). When you click **Next>>**, red errors will indicate any required fields with missing or incorrect entries.

## **Curriculum Tab**

The Curriculum tab is for entering two simple pieces of information for the program, to associate it with the type of information that may be used in Course Catalogs: a Course Code, and a Course Title. Multiple course codes and titles can be associated with the program. At least one curriculum item is required when the site is configured to display the Curriculum tab.



This tab may be configured to not display on the wizard, or to display with Curriculum not required, or to display with Curriculum as a required entry (that is necessary to complete the Confirmation and Review tabs).

#### To create a Curriculum record:

- Click the Add Curriculum link.
  - A separate box opens above the tab for entry of two fields.
- **Code:** Enter a code number for the specific instance of the course.
- Course Title: Enter a title for the specific instance of the course.
  - The Curriculum tab returns, with the record displayed in a table.





Curriculum Tab (Adding a Course Code and Title)

- Repeat the steps for other Curriculum records as necessary.
- Click the **Next>>** button.

The Occupations tab will display.

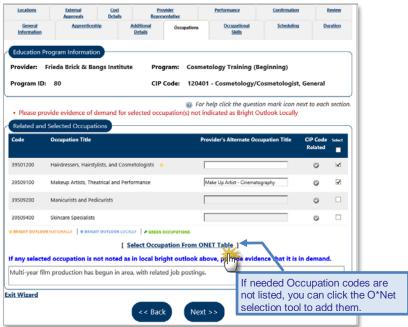
# **Occupations Tab**

The Occupations tab lets the provider identify O\*Net occupations that are associated with this program. This is done by selecting occupations from a list of related occupations. The Related Occupations list displays occupations related to the CIP code that was selected on the General Information tab for this program (e.g., the figure below is for a CIP code of 120401 - Cosmetology/Cosmetologist, General, on the General Information tab).

The Related Occupations include indicators for *In Demand* occupations (i.e., if the O\*Net code is classified as a Bright Outlook or a Green Occupations code).

To select related occupations:

- Click the boxes in the Select column for the desired occupations.
   The fields are enabled under Alternate Occupation Title as each box is checked.
- Enter text in the enabled box for any Provider's Alternate Occupation Title (entry is optional).



Sample Related Occupation Codes and Bright Outlook Occupations



- Also enter text it the last box to indicate how the occupation is in demand in the area, if a selected
  occupation is not identified as Bright Outlook Locally.
- Click the Next>> button.

The Occupations Skills tab will display.

### More Notes – Occupations Tab

**Optional Selection** – An entry is not required on this screen, since some CIP codes may not display possible occupations on this screen. However, if any Occupation Titles are displayed, occupations should be related. An occupation selection is required for submission for program approval for ETPL.

**Search and Select Occupation Code** – The displayed list is from occupations, related by the CIP code in the General Information tab to this program. If other occupations apply, you can use the standard Occupation Search tool to select the Occupation (the link at the bottom of the list).

### **Occupation Skills Tab**

The Occupation Skills tab lets providers identify and select skills, based on a selection list that pertains to O\*NET occupation skills related to the course. The provider has the opportunity to attach a list of occupational skills that will benefit the participant. These skills are derived from O\*NET and they work in much the same way as the O\*NET skill sets work for employers seeking candidates or individuals wanting to find jobs that are related to their background.

To select occupation skills for the program:

Click the <u>Add new occupation program skills</u> link.

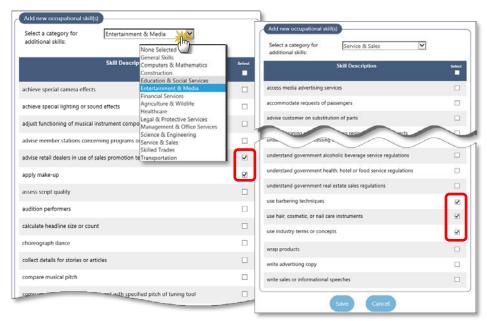


Selected Occupational Skills for a Program

- An Occupational Skills Selection Screen displays (as shown in the following figure).
- Select a category from the Additional Skills drop-down.
- Check the boxes for the appropriate skill in that category.
- As needed, repeat the process until you have checked all skills applicable to the program.

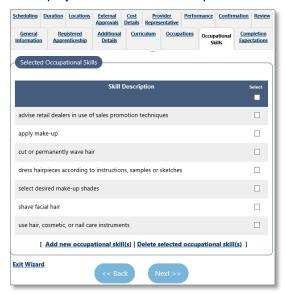
**Note:** When you select other categories and check the appropriate boxes, the checked skills in each category stay in memory until you click **Save** or **Cancel**.





Occupational Skills Selection Screen (14 Categories) Program

Click the Save button to save the list of all checked skills.
 The tab is refreshed and displays all the selected occupational skills.



Program/Service Skills List

**Note:** Once skills are saved, if you click the link to <u>Add new occupational skill(s)</u>, the 14-category skills list is redisplayed. However, the saved skills do not display in the tab lists, since they are already selected and saved.

Click the Next>> button.
 The Completion Expectations tab will display.

# More Notes – Occupation Skills Tab

**Skills Categories:** The Occupational Skills Selection screen is a list of O\*Net job skills (14 categories). It is also used in by both individuals and employers (for individual-to-job matching, by job skills).



# **Completion Expectations Tab**

This tab lets providers define some common program parameters that identify expectations related to completion of the program (such as program goals, credentialing body, projected wages).

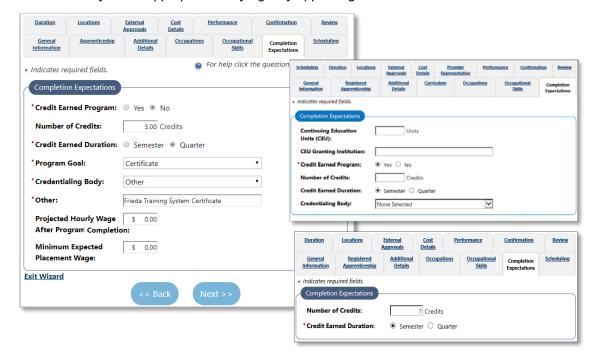


This tab and many fields on it are configurable (it is turned off for some sites). If all fields are Off, the tab will not display. The listed fields, below are for the first of the three sample screens (displayed in the figure).

To complete the Completion Expectations tab:

- Enter the appropriate information for each displayed field:
  - Credit Earned Program: Click Yes if there is a defined number of credit earned.
  - Number of Credits: If you clicked Yes to previous question, enter the number of credits the participant earns by completing this program.
  - Credit Earned Duration: Indicate if the credits are earned in a Semester or a Quarter system.
  - Program Goal: Select a type of completion goal from the drop-down.
    - If you select a credential document (such as a certificate, license, or degree), the next field displayed is Credentialing Body.
  - Credentialing Body: Select a credentialing or accrediting body from those listed in the dropdown.

**Note:** If none in the drop-down applies, select "Other". An "Other" text-field may display, for entry of the appropriate body/agency approving the credential.



Completion Expectations Tab (Three Samples)

- Projected Hourly Wage: Enter a projected hourly wage that participant will receive, after completion of this program, if they attain employment in a related field.
- Minimum Expected Placement Wage: Enter the minimum wage that is expected for placement in a related position, after completion of this program.
- When all data is entered, click the Next>> button.
   The Scheduling tab will display.



# **Scheduling Tab**

This tab is used to provide scheduling details about the course in three areas: Course Times, Reporting Information, and Mode of Delivery.

To complete the Scheduling tab:

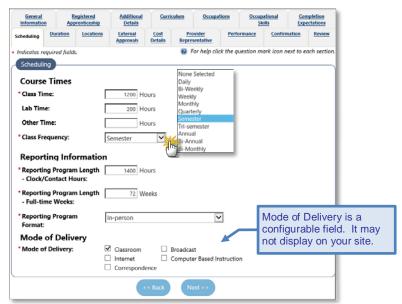
Enter the appropriate information for each displayed field:

#### **Course Times**

- Class Time: Enter the total hours in class.
- Lab Time: Enter the total hours in a lab session.
- Other Time: Enter the total hours for any other type of controlled session times.

**Note:** Enter all course time that applies (all hours for the course). Providers can break this down with Lab Time, and Other Time, although these two fields are optional.

 Class Frequency: Select the frequency to indicate how often an individual may enter the program.



Scheduling Tab

### **Reporting Information**

Each of the following fields is required for WIOA reporting.

Program Length - Clock/Contact Hours: Enter the total times in the Course Time area.

**Note:** The hours will normally match with the total hours under Course Times above. However, these hours are used in Federal Reporting. Course Time hours can meet other state/local purposes.

Program Length - Full-time Weeks: Enter the total number of weeks related to the hours.

**Example:** An associate's program may take 4 semester at 18 weeks per semester, may be a total of 72 full-time weeks.

• **Program Format:** From the drop-down, select the format in which the participant receives the training (e.g., In Person, Online, or a Hybrid of the two).

#### **Mode of Delivery**

Mode of Delivery: Check applicable boxes, if there is more than one delivery type.



**Note:** Mode of Delivery is configurable, and may not be displayed for your site. It may also be configured to permit only one selection. The use of the "Program Format" selection, may negate the need for Mode of Delivery fields.

When all data is entered, click the Next>> button.
 The Duration tab will display.

#### **Duration Tab**

The Duration tab lets providers enter one or more durations for the program/course (e.g., a primary and alternate duration). At least one duration, the *primary duration*, is required when the site is configured to required duration. If multiple durations are created, the times can be different for each duration record (e.g., a part-time night or weekend course for three semesters, or a full-time, intensive summer course).

To create a Duration record:

- Click the Add Duration link. A separate box opens above the tab for entry of Duration fields.
- Enter data in each field to define the duration:
  - Duration Title: Enter a title for the specific instance of the course.
  - Primary Duration: Enter a code number for the specific instance of the course.
  - **Duration Type:** Select the type from the drop-down (i.e., Hours, Months, Weeks, Semester).
  - Schedule Intensity: Select Full-Time or Part-Time.
  - Weekly Schedule: Enter the weekly schedule for the program courses which indicates the week days (e.g., Monday Friday, Mon–Tue–Thu).
  - Classes Offered: Check boxes for how the course is offered/available, from the drop-down (e.g. Day, Night, Weekend, and/or Summer classes).
- When all data is entered, click the Save button.

The Duration tab returns, with the record displayed in a Duration table.



Duration Tab (for Multiple Duration Types)

- Repeat the steps for other Duration records as necessary.
- When all data is entered, click the click **Next>>** button.

The Locations tab will display.



#### **Locations Tab**

The Locations tab is used to indicate the provider's locations that host the program (i.e., which locations offer this specific program). When multiple locations exist for provider institution, all active locations are shown in the list. Multiple locations can be selected.

Check the boxes to select one or more locations where the program will be offered.



Location Tab (for Multiple Locations)

When locations are selected, click the click Next>> button.

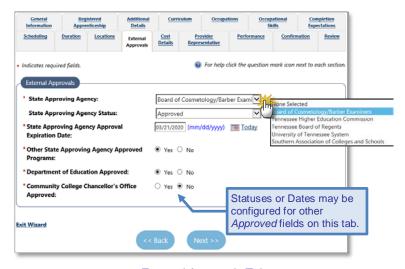
The External Approvals tab will display.

**Note:** Existing locations for the provider institution can also be added or edited from the Locations tab of the Provider Profile. See the topic on Adding a Provider Location in chapter 3, for more details.

### **External Approvals Tab**

The External Approvals tab may contain several fields or prompts for identifying information about state approving agencies, department of education, community college or other approval data.

This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard. The listed fields, below, are for a sample configuration.



External Approvals Tab



To complete the External Approvals tab:

- Enter the appropriate information for each displayed field:
  - State Approving Agency: Select from the agency list (there may only be one selection).
  - State Approving Agency Status: Select the status from the possible statuses for the agency.
  - State Approving Agency Expiration Date: Based on the response to the status, an expiration date may be required. If so enter the date.

Answer any other required field, such as the following Yes/No fields:

- Other State Approving Agency Approved Programs
- Department of Education Approved
- Community College Chancellor's Office Approved
- When all data is entered, click the Next>> button.

The Cost Details tab will display.

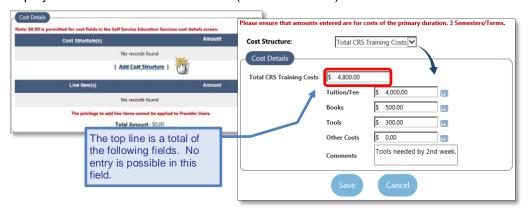
#### **Cost Details Tab**

Cost details are required for a standard program submitted for ETPL approval. The Cost Details tab is used to indicate detailed costs of the program, through a standard cost structure for the total training costs (which include Tuition/Fees, Books, Tools, and Other Costs).

To add the cost details for the program:

- Click the <u>Add Cost Structure</u> link on the blank screen.
  - A screen displays for entering cost details.
- Select a Cost Structure type from the drop-down (e.g., Total CRS Training Costs).

This displays fields in the Cost Details area (as shown below).



Adding Cost Details (via a Cost Structure)

Enter the cost/amount in each of the fields that apply.

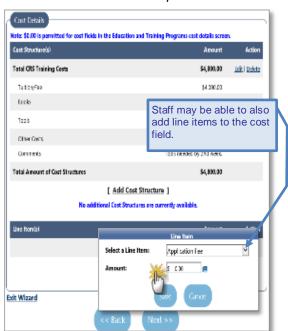


**Note:** Cost fields can be left as \$0.00 because of cost variations, and edited for each enrollment record. However, costs should be for the duration identified in the previous Duration tab.

A reminder of this shows at the top of the screen.

- If necessary, click the <u>Add Line Item</u> link to open a separate box for Line Item costs.
  - Select the type of Line Item
  - Enter the dollar amount for the line item.
  - Click Save.
     A row for the Amount is added to the Line Items table (bottom of the screen).
- Click Save. The Cost Details tab redisplays, showing costs, plus an Action column (to Edit or Delete costs).
- When all cost are entered correctly, click the Next>> button.

The Provider Representative tab will display.



### (i) More Notes - Cost Details Tab

Required Cost Details: Cost details are

required for programs submitted for ETPL approval (unless it is a Registered Apprenticeship with no technical instruction by another provider).

**Cost Structure Selections:** There is always one standard cost structure available (Total CRS Training Costs). Your site may display additional Cost Structures selections, if the site uses a custom Cost Structure look-up table.

**Line Item Cost Details:** Provider Users cannot create separate Line Item costs. The Line Item link is only accessible to staff (who are assisting the provider).

It will display as a separate <u>Add Line Item</u> link at the bottom of the tab (as shown in the figure below). When staff click the link, they can select a line-item type, and enter an additional cost.



Adding Cost Details (via a Cost Structure)

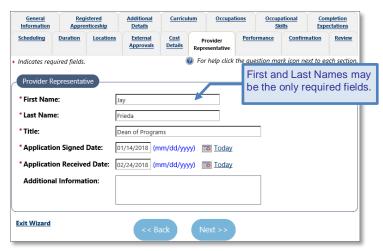


# **Provider Representative Tab**

Like the External Approvals tab, the Provider Representative tab may contain several fields or prompts for identifying information about an individual defined as the *Provider Representative*. This is someone designated as the official person to contact, at the provider, specifically about this program.

\*

This tab and multiple fields on it are configurable. If all fields are Off, the tab will not display on the wizard. The following fields are for an example screen. (In most sites, this tab does not show.)



External Approvals Tab

To complete the Provider Representative tab:

- Enter the appropriate information for each displayed field, as appropriate:
  - First Name
  - Last Name
  - Title
  - Application Signed Date
  - Application Received Date
  - Additional Information

**Note:** If this tab exists, first and last name are normally required fields. For a customer who only had one name field for Provider Representative prior to this E & T Programs wizard, the full name entry was moved into Additional Information during conversion.

When all data is entered, click the Next>> button.

The Performance tab will display.



#### **Performance Tab**

The Performance tab is an important tab for recording the performance data for individuals enrolled in the program (which is used in federal reporting). The tab is also used by staff as part of their review to determine whether this program will be added to, or will continue to be included on the ETPL list. The Performance tab lets you maintain the performance data for individuals who registered for the program/course, and maintain statistical data on the success rate of the course.

Depending on your site's configuration you will see: (A) an SSN Performance Data control (for entering data specific to each enrolled individual, by their SSN), or (B) a Performance Year control (for entering aggregate data for enrolled individuals, by the year).





For SSN, see below

For Performance Year, see the next page

Each of the two methods for entering performance data are described in the following two subtopics.

# SSN Performance Data (Adding Data per Enrolled Individual)

If no data has been added yet for any SSN, then only the **Add SSN Record** button will display. If some data was added already, then you will see rows for each individual/SSN that was entered, and the **Add SSN Record** button will display below the list.

### To add performance data (for an SSN):

- 1 Click the Add SSN Record button to display SSN Performance Details fields.
- 1 From the SSN Performance Details section, enter all applicable data for the most recent status for one SSN.

**Note:** At minimum you must enter SSN, Start Date and Status. Depending on your entries, certain statuses may not be selectable.



Entering Performance Data for a Specific SSN

- 2 Click the Save button. The list of SSNs will reload with the new entry included.
- 3 Repeats the process for each SSN, for each individual enrolled in the program.
- 4 When all data is entered for each SSN, click the Next>> button. The Confirmation tab will display.



**Note:** A separate left-nav menu option for importing the SSN data through an Excel spreadsheet is under consideration for a later enhancement.

# Performance Year (Adding Aggregate Data)

If no aggregate data has been added yet for the performance year, you will start by creating a Performance Year record for the data. When a new program is first added, this tab will be empty, except for two controls:

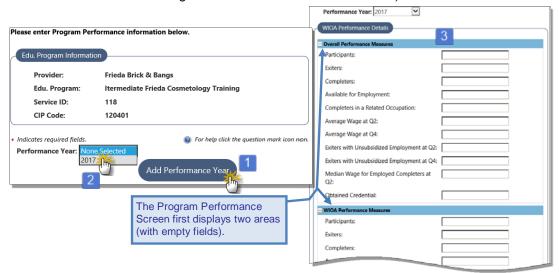
- a Performance Year drop-down control
- ♦ an Add Performance Year button

To add a performance year (and start entering details for the year):

- 1 Click the **Add Performance Year** button. This will load the drop-down with one or more years (depending on a configuration in Admin).
- 2 Select the year from the Performance Year drop-down list.

**Note:** Staff may see options for current year, one year subsequent to current year, and up to 10 prior performance years, for any historical data. (This is not determined by Admin settings.)

The Program Performance screen is initially empty. Once you select a Performance Year, the screen updates to display two areas: WIOA Performance Details and Common Fields (the Common Fields are is configurable – most sites do not include it).



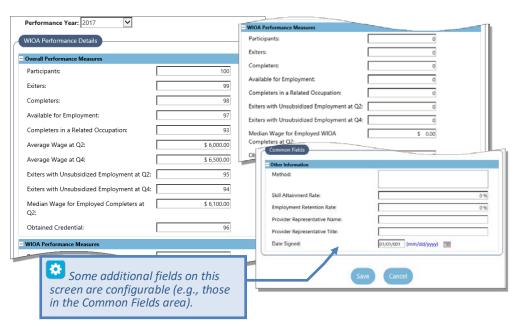
Opening a Program Performance Screen for Aggregate Data Entry for a Specific Year

- 3 Enter data in the fields in each area, for the displayed Performance Year. This includes:
  - Data for Overall Performance Measures
  - Data for WIOA Performance Measures
  - Any applicable data for Common Fields

Note: The Overall or WIOA Performance Measure fields are not required, since they may not be known for a course, at the beginning of the program year. If you do not enter data, a value of zero will be entered in the field, as shown in the following figure.

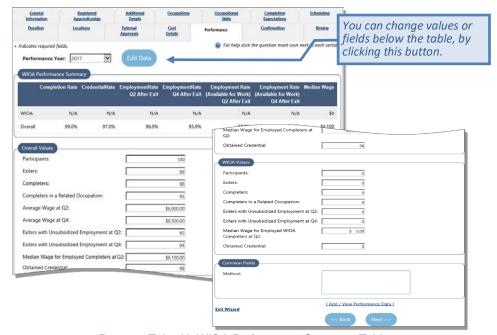
Keep in mind that performance data is not required but is critical to reliable WIOA certification. It must be verified by staff to be accurate. Therefore, sites are often configured to limit the entry to staff, and only allow provider users the ability to view the completion, employment, and performance rates. You may not have the ability to edit this performance data.





Initial Entry of Program Performance Data

4 Click Save (once you have entered as much performance data as is currently known/gathered). The Performance tab is redisplayed to include a WIOA Performance Summary above the areas for the entered Overall Values, WIOA Values, and Common Fields.



Program Tab with WIOA Performance Summary Table

This summary table lists rates used for review and for WIOA reporting – e.g., Completion Rate, Credential Rate, and Employment Rate after Exit, for Quarter 2 and Quarter 4 (as shown above).

5 When all data is entered, click the **Next>>** button.

The Confirmation tab will display.



#### More Notes – Performance Tab

Entering the Overall and WIOA Values: Performance data is not required but is critical to reliable WIOA certification. It must be verified by staff to be accurate. Therefore, sites are often configured to limit the entry to staff, and only allow provider users the ability to view the completion, employment, and performance rates.

# Confirmation Tab – for WIOA Application Approval

The *Program/Service Application Confirmation* section is normally the last section a provider user opens, to confirm the application for WIOA Approval by staff.

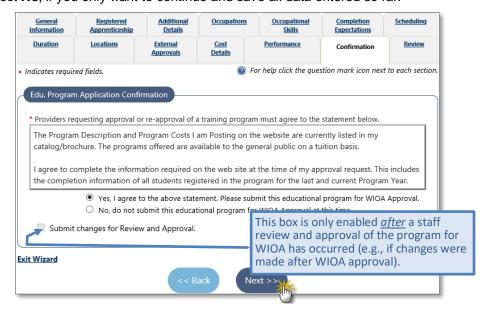
This section contains a simple confirmation statement that must be read by a provider user before they submit the program for approval. If staff manage and submit the programs for the provider, they will have to select the Yes radio button (i.e., agree with the statement) to submit the program for WIOA Approval.

**Note:** Red error messages display above the screen, if any required fields on previous tabs are incomplete. For example, if staff still need to identify the Education Profile Type, or the LWDB, on the General Into tab, the message displayed is:



### To apply and confirm the program for staff review:

- Select Yes, if you want to proceed and submit the data in previous tabs for WIOA approval.
- Select No, if you only want to continue and save all data entered so far.



Program/Course Confirmation Tab

Click Next. The Review tab displays (and the course is submitted for staff approval).

**Note:** A notification message is sent to workforce staff to review the course (to either approve or reject it). If **No** is selected, the course is only saved and included in Education Services.



# Confirmation Tab – for Registered Apprenticeship Approval

With an Apprenticeship program, some fields and tabs are not required, so the red messages for any missing required data (at the top of the Confirmation tab) will be less. If the Apprenticeship is identified as a *Registered* Apprenticeship program, there are little or no fields required (e.g., just fields on Occupation and Cost Details), as mentioned in the topic for *Apprenticeship Tab* on page 8-8.

The confirmation questions is simply, "Request inclusion on ETPL?"

# To confirm and submit an Apprenticeship program:

- Select Yes, to have staff approve/ include the Apprenticeship Program on the Eligible Training Provider List (ETPL).
- Select No, if you only want to continue and save all data entered so far.
- Click Next. The Review tab displays (and the Apprenticeship course is submitted for staff approval).



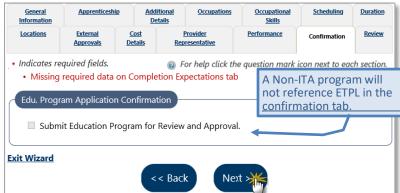
Confirmation Tab for Registered Apprenticeship Program

# Confirmation Tab – for Non-ITA Program Approval

When non-ITA programs are selected for the Education Program Type on the General Information tab (e.g., PS - Non-ITA Occupational Skills and PS - Training Non-ITA), the Submit for ETPL Approval prompt on that tab is set to *No*.

Depending on other information in the program's description, and in each tab, the non-ITA program may display the same red messages, for missing required data, which can be displayed for an ETPL program. However, the question on the Confirmation tab will be different. It will only ask, "Submit Education Program for Review and Approval." It will not mention ETPL.

# To confirm and submit an a non-ITA program for staff review:



Confirmation Tab for Non-ITA Education Program

- Select Yes, if you want to proceed and submit the data in previous tabs for review and staff approval (as a non-ITA).
- Select No, if you only want to continue and save all data entered so far.
- Click **Next**. The Review tab displays (and the course is submitted for staff approval).



# Review Tab - Status and Staff Approval

The final tab of the E&T Program wizard is the Review tab, which is primarily for staff users. (Provider users cannot review or approve their own programs). Staff must review the program and provide a status.

Staff use the Review tab to adjust the review status, after they review the program and monitor any changes. They indicate the status (e.g., *Approved* or *Rejected*). The same tab lets staff review a program's application (or reapplication) for WIOA eligibility.

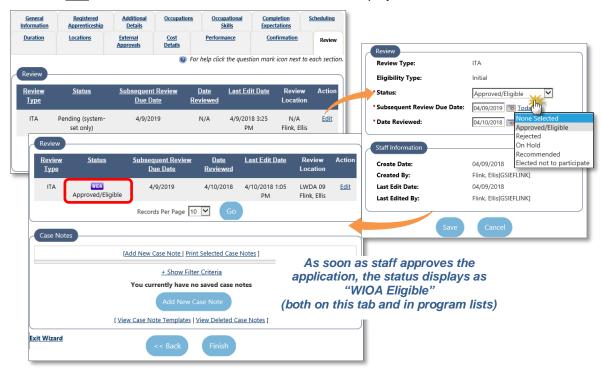


Review Tab (with Change Submitted, Pending Review & Approval)

On this tab, staff can see a table of records for each submitted approval, or change. They can use a <u>View</u> or <u>Edit</u> link (displayed for each review type) for a submitted review. Using the <u>Edit</u> link, they can select or change statuses of a program in review. (E.g., the Review tab above shows a program that has received staff approval, and has had two rounds of changes submitted.)

#### To Change the Review Status (from the Review tab):

1 Click the Edit link in the Action column. A Review screen displays.



Review Tab (sample of First Submission for WIOA approval)

- 2 Select a Status from the drop-down list (in the Review section of the screen).
- 3 Enter the Date Reviewed.
- 4 Click the Save button. The Review is redisplayed with the updated status.
- 5 Click Finish to complete change and return to the Program list.

Note: Sites may also be configured to require review by both local staff and state staff.



For Non-ITA programs the same steps are used to approve the program. However, the Review screen only displays radio buttons (Rejected or Approved), not drop-down options, and there is no Subsequent Review Date.



Review Tab (sample of First Submission for WIOA approval)

# **Program/Service Reapplication Approval**

When a staff member approves a program for ETPL eligibility (on staff's edit screen from the Review tab), it will display to you (and other provider users) with a WIOA icon. The WIOA icon displays on the Education and Training Programs list (under the program name).

Staff's approval also includes a Subsequent Review Due Date (which is normally one year from staff's initial approval date). When the program nears that date (e.g., within 30 days of the date) both staff and provider users will see the **REAPP** icon displayed next to the **WIOA** icon.



Sample Program Due for WIOA Reapplication (Confirmed and Resubmitted for Approval)

Provider users may or may not make additional changes to many areas of the program, to renew it for another year. However, they should review all their information, make any needed updates (e.g., new performance data), and then confirm and resubmit the program.

When the user updates, confirms, and resubmits the program (from the Confirmation tab), the status will indicate "Pending", in the Review Status column. E.g., if they update a currently approved program that is



due for re-approval, with no significant changes, and then they resubmit it from the Confirm tab, the Review Status column will display "Approved/Eligible, Pending (system-set only)" as shown in the figure above.

The staff member will need to review the program again, and reapprove it.

#### ► To Reapprove a Program Submitted for Reapplication:

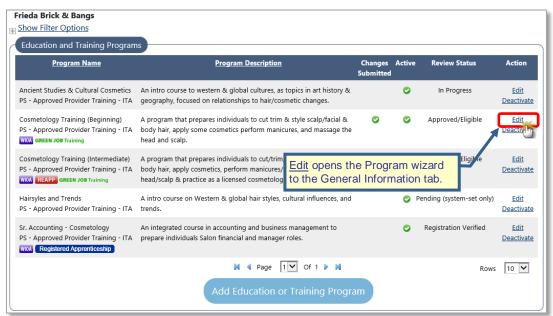
- Identify that the program has a REAPP status (on the Education and Training Programs list), and is pending review.
- Click the <u>Edit</u> link from the action column.
   The wizard opens to the General Information tab.
   Select the Review tab.
- Follow the same steps in the previous topic to approve the program.

When you are finished the Review Status will say Approved/Eligible again, and the REAPP icon will no longer display.

Note: Also see the next chapter for the menu option to search/view all program pending reapplication.

# Editing a Program (via the Edit link and E&T tabs)

When you click the <u>Edit</u> link for a program, from the Action column of the E&T Programs List, it will open the same Program wizard and the related tabs that were first displayed in adding the program (as shown in the following figure). You can click on the links to move to any tab, make edits on the tab, and then confirm your edits, in the same way that you did for initial creation of the program.



The Education and Training Programs List (to edit programs)

#### To Edit a Program:

Click the <u>Edit</u> link from the action column.
 The wizard opens to the General Information tab.



- Select the tab that requires edits.
- Use the controls to edit or add to information for that tab.
- Click the Next>> button to save any changes for the tab.
- When all additions or edits are made, click on the Confirmation tab.
- Check the box Submit for Review and Approval, if you want to save all changes and have staff approve them.

**Note:** If you want to save changes, but not submit them yet (e.g., you may have more to make), do not check this box. If a review is pending, the box will be disabled.

- Click the Next>> button to save all changes and move to the Review tab.
- Click the **Finish** button to return to the E&T Programs List.



# 9: Managing Program Reapplication

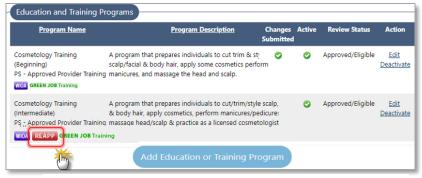
	<b>Chapter Contents</b>	
Listing Programs due for R	eapplication	9-1
	am Reapplication Screen	
	am Reapplication Screen	
	ation Steps	

When a staff member approves a program for ETPL eligibility (on staff's edit screen from the Review tab), a WIOA icon will display to provider users. When a program is approved, the WIOA icon displays on the Education and Training Programs list (under the program name). The staff approval also includes a Subsequent Review Due date (which is normally one year from staff's intial approval date).

When the program nears the Subsequent Review Due date (e.g., is within 30 days) both provider users and staff see a WIOA icon and a REAPP icon.

At that point, the provider user should make any needed changes to descriptions for the program, as part of renewing the application for another year.

However, staff may need to view/manage providers with programs about to be due for



Sample Program Due for WIOA Reapplication (Provider User View)

reapplication, or programs that are overdue (i.e., programs that have past their Subsequent Review Due date without a submitted reapplication from the provider user).



# Listing Programs due for Reapplication

Staff can open the Manage Program Reapplication screen to view programs nearing reapplication anytime they want to view the list and see the programs. They can decide how far in advance they want to look at the program, and then they can use the Edit link (in the Action column) to open the program. When they click Edit, the program will open with the same multi-tab Program wizard that is used to edit the programs initially.

Staff can keep track of multiple providers that have programs due for reapplication by clicking the <u>Manage Program Reapplication</u> screen from the **Services for Staff > Manage Providers** menu.

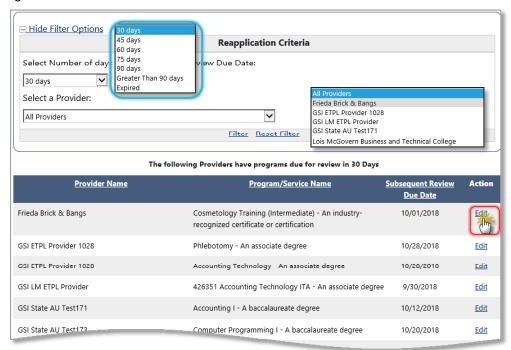
## ▶ To Generate a List of Programs Due for Reapplication:

 Select the <u>Manage Program Reapplication</u> from the Manage Provider fly-out menu, in the Services for Staff menu group.



The Manage Program Reapplication Screen displays (as shown below).

- Review the listed programs for the default number of days (e.g. 30 days).
- Change the defaults, as desired.
- Click the <u>Filter</u> link to redisplay the list for the new defaults.
  - The Manage Program Reapplication Screen redisplays.
- Click the <u>Edit</u> link from the action column, to open a program and see each of the tabs for the program.



Manage Program Reapplication Screen

# Filter Criteria for Program Reapplication Screen

The Reapplication Criteria section allows staff to filter by the number of days from the Subsequent Review Due Date) (also referred to as the Reapplication Date). Staff can choose from filtering for programs within 30 days of requiring reapplication, to programs greater than 90 days (or those already expired).

Using the drop down for days (from the Subsequent Review Due date), they can select 30 days (which is the default when the screen opens). They can also pick 45, 60,75, 90, or greather than 90, to see any programs for one or multiple providers, which are further out from the needed reapplication date, but which may need attention. Staff can also select *Exprired* to see a list of all programs past the Subsequent Review Due date (i.e., programs which are no longer WIOA eligible or available for WIOA ITA



enrollments after the subsequent review due date, due to not reapplying for approval, or not passing reapproval).

Based on this filter, a list of providers display in a table, which includes the *Program* due for reapplication, the Subsequent Review Due Date, and an <u>Edit</u> link in the *Action* column. The <u>Edit</u> link will take staff to the provider information, along with the link in the *Provider Name* column (see example below.) Staff can use this screen to quickly see a list of all programs that are due for reapplication, may be due soon, or that are overdue (based on the Subsequent Review Due date).



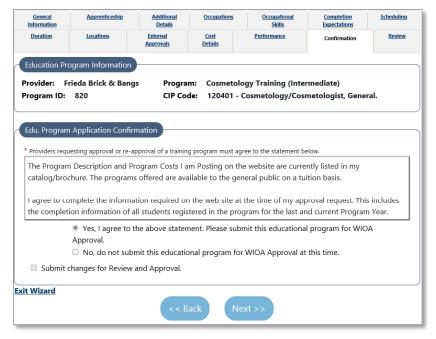
# Filter Criteria for Program Reapplication Screen

Provider users who are due for Program Reapplication can reapply from the Confirmation tab on the Program wizard. If Provider Users do not reapply via the Confirmation tab, when they see the REAPP icon, staff can reapply for them. The Confirmation tab will be available to provider users following their initial WIOA approval by staff.

Staff can also use the Manage Program Reapplication option, to identify users they may contact to notify them of the need to reapply.

# **Provider User Reapplication Steps**

Provider users will reapply by using the Program Wizard, editing the program with the REAPP status, and making any changes or updates on tabs that are necessary (e.g., more recent programs descriptions, program costs, or new performance data from the Performance tab). Then the users will use the same Confirmation tab that they initially used for confirming the application for WIOA Approval.



Program/ Service Re-Application Confirmation



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# 10: Provider Certification (Opt In/Out)

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The *Manage Providers* component lets authorized staff identify providers as WIOA Eligible Training Providers, at a state level, adding them to an Eligible Training Providers List (ETPL). Authorized staff can also create, modify, and approve the programs for those providers' WIOA Eligible programs. Typically, when staff authorize and enable a provider institution (as an ETPL provider), the institution is available as

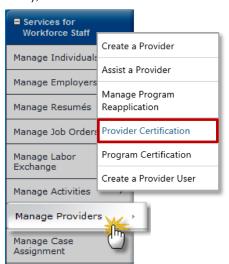
a certified ETPL Provider, at all state and local levels. Similarly, when staff approves an ETPL provider's programs as WIOA-Eligible, those programs are certified as WIOA-Eligible programs for state and local use.

However, depending on your state rules, site configuration, and staff privileges for the Managing Providers options, you may also see separate options for Provider Certification and Program Certification. These options let non-state staff *Opt In* or *Opt Out* of providers' certifications (and specific programs' certifications) at local levels. In other words they can view and switch existing certifications for LWDB, and *Opt In* or *Opt Out* of the provider's individual program certifications at local LWIA levels.

If you have this ability, then when you access the Manage Providers fly-out menu options, they will include access for Provider Certification and Program Certification.

With the Provider Certification option, local staff members (not state staff) can view a list of provider institutions which are approved in

the system, and have WIOA eligible programs. Then, although the provider is approved at the state level, the staff can opt-in or opt-out of a certification for the provider for the local workforce region associated with that staff member.



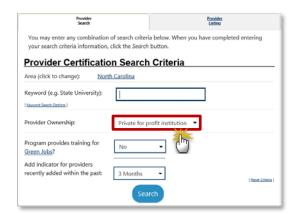
# **Changing Provider Certification Locally**

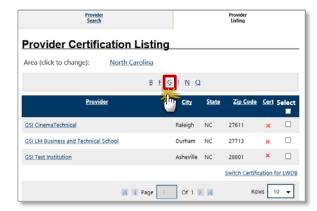
Staff (other than state staff) who have privileges for local certification can open a search screen to view available providers. From the list of displayed providers, they can select providers whose certification they want to change, and then switch the certification for those providers for their LWIA.

#### ▶ To Change a Provider's Certification:

- Select Manage Providers > Provider Certification from the Left Navigation menu.
  Two tabs display to let you see providers in one of two ways: by search criteria or by an alphabetical listing.
- 2 Use either method to display a Providers Certification Listing that includes the providers whose certification you want to switch (as shown in the following figure).



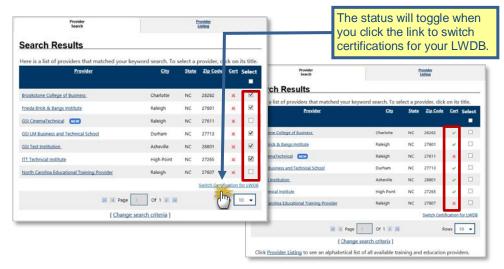




Example of the Two Provider Certification Tabs

- Provider Search tab lets you select or enter search criteria to find and list provider matching the criteria. This can include searching by:
  - Area: This lets you select the area type of area, and then use a drop-down to select a specific area. For example, select Workforce Area and then Durham County WDB.
  - **Keyword**: A word used in the provider's name. E.g., the word *university* may find many providers, while full name of the institution, *Florida State*, may only find one provider.
  - Provider Ownership: A drop-down list lets you limit results to an ownership type Private for Profit, Private Non-Profit, Public.
  - Indicator for providers recently added: A drop-down list lets you limit results to recently added providers within a recent time frame 2 weeks, 3 weeks, 1 month, 3 months, 6 months.
- Provider Listing tab lets you select a provider from a list of providers that is sorted alphabetically.
- 3 From the displayed provider listing, check boxes in the Select column for providers to be switched.
- 4 Click the Switch Certification for LWDB link.

The certification for the selected providers changes in the Cert column (*uncertified*, a red x, will change to *certified*, a green check mark, and vice versa).



Example of Adding Certification for Multiple Provider



# **Important Notes for Provider Certification**

**The default for certification is "uncertified"**: Sites with this local Provider Certification option, will start as "uncertified" once they are approved at a state level. That means that even though providers are approved/enabled at a state level, they will show as "uncertified" (as a red x) until they are certified locally by staff in your workforce area.

**Switch Cert for LWDB:** Clicking the <u>Switch Certification for LWDB</u> link changes the certification of the provider, only at the local workforce area associated with you as staff. Another staff member with the same LWDB will see the change, while others will not.

For example, if you are a staff member, in Florida, for a Miami LWDB, and you toggle a provider from uncertified to certified, other local staff in the Miami LWDB would also see it a certified. Local staff in the Tallahassee LWDB will see it as uncertified, until local staff in that LWDB certify the provider.

A Provider Certification affects all their Programs: If you decertify a provider, it will also automatically decertify all their programs, for your workforce area. You should consider selecting each provider separately, if you want opt out of all their newly-added programs.

If you certify provider, it will automatically certify all their WIOA approved programs, as well. You will have to decertify (opt out) of individual programs, by selecting



the provider, to see the Program Certification list for the program. They you can decertify specific programs. A confirmation box will indicated this when you click the link to decertify programs.

**Providers must have WIOA-approve programs to display in the list:** Providers that are created and approved as providers will not show in the Provider Certification Tabs until at least one program for them is a WIOA-approved program.



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# 11: Program Certification (Opt In/Out)

# **Chapter Contents**

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As mentioned in chapter 10, for Provider Certification, the Manage Providers component lets authorized

staff identify providers as WIOA Eligible Training Providers, at a state level, adding them to an Eligible Training Providers List (ETPL). Authorized staff can also create, modify, and approve the programs for those providers' WIOA Eligible programs. Typically, when staff approves these WIOA Eligible programs, they are certified as WIOA-Eligible programs for state and local use.

However, depending on your state rules, site configuration, and staff privileges for the Managing Providers options, you may also see separate options for Provider Certification and for Program Certification (as shown at right).

These options let non-state staff *Opt In* or *Opt Out* of specific programs' certifications at local levels. In other words they can view and switch existing certifications for LWDB, and *Opt In* or *Opt Out* of individual program certifications at local LWIA levels.

If you have this ability, then when you access the Manage Providers fly-out menu options, the options will include access for Provider Certification and Program Certification.



With the Program Certification option, local staff members (not state staff) can view a list of approved, approved, WIOA-eligible programs. Then, although these programs for a provider are WIOA-approved at the state level, the staff can opt-in or opt-out of a certification for the program at the local level, for the local workforce region associated with that staff member.

**Note:** The screens for certifying programs will operate in the same manner as they do for providers. You can review chapter 10, Provider Certification (Opt In/Out) for more on how provider certification is related.

# **Changing Program Certification Locally**

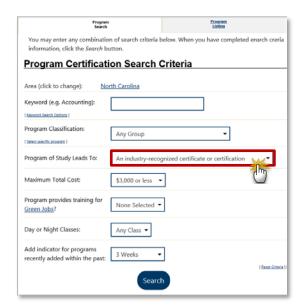
Staff (other than state staff) who have privileges for local certification can open a search screen to view available programs. From the list of displayed programs, they can select programs whose certification they want to change, and then switch the certification for those programs for their LWIA.

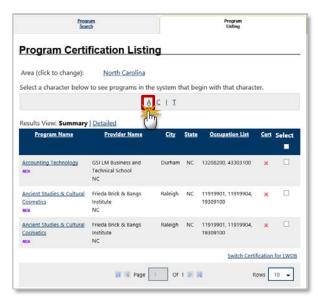
### To Change a Program's Certification:

- Select Manage Providers > Program Certification from the Left Navigation menu.

  Two tabs display to let you see programs in one of two ways: by search criteria or by an alphabetical listing.
- 2 Use either method to display a Programs Certification Listing that includes the programs whose certification you want to switch (as shown in the following figure).







Example of the Two Program Certification Tabs

- Program Search tab lets you select or enter search criteria to find and list programs matching the criteria. This can include searching by:
  - Area: This lets you select the area type of area, and then use a drop-down to select a specific area. For example, select Workforce Area and then Durham County WDB.
  - Keyword: A word used in the program's name. E.g., the word accounting may find many
    programs, while a larger name of accounting technology, along with other criteria, may
    only find one program.
  - Program Classification: A drop-down list lets you limit results to an ownership classification, which is a Classification of Instructional Programs (CIP) code. The dropdown list the program codes.

**Note:** There is also a <u>Select program classification</u> link, which opens a separate window, with tab/tools that can be used to find the appropriate classification. This is the same tool used elsewhere in the system for selecting a CIP code.

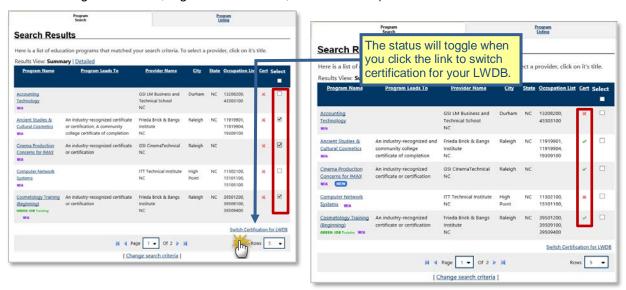
- Program of Study Leads to: A drop-down list lets you limit results to one of the types of certification, license, degree, or diploma that the program will lead to. This is based on the same sections that are used as part of a program's creation and approval.
- Maximum Total Cost: A drop-down list lets you limit results to a maximum cost for the program.



- Indicator for programs recently added within the past: A drop-down list lets you limit results to an added program within a recent time frame 1 week, 2 weeks, 3 weeks, 1 month, 3 months, 6 months.
- Program Listing tab lets you select a provider from a list of providers that is sorted alphabetically.
- 3 From the displayed program listing, check boxes in the Select column for programs to be switched.
- 4 Click the <u>Switch Certification for LWDB</u> link.



The certification for the selected programs changes in the Cert column (*uncertified*, a red x, will change to *certified*, a green check mark, and vice versa).



Example of Adding Certification for Multiple Provider

# **Important Notes for Program Certification**

- **The default for certification is "uncertified"**: Sites with this local Program Certification option, will start as "uncertified" once they are approved at a state level. That means that even though programs are approved/enabled at a state level, they will show as "uncertified" (as a red x) until they are certified locally by staff in your workforce area.
- **Switch Cert for LWDB:** Clicking the <u>Switch Certification for LWDB</u> link changes the certification of the program, only at the local workforce area associated with you as staff. Another staff member with the same LWDB will see the change, while others will not.
  - For example, if you are a staff member, in Florida, for a Miami LWDB, and you toggle a program from uncertified to certified, other local staff in the Miami LWDB would also see it a certified. Local staff in the Tallahassee LWDB will see it as uncertified, until local staff in that LWDB certify the program.
- A Provider Certification affects all their Programs: If you certify a program, and you or another staff member in your same LWDB decertifies the provider, it will also automatically decertify all their programs, for your workforce area.
  - Conversely, if you or other staff in your same LWDB certifies the provider, it will automatically certify all their WIOA approved programs.



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# 12: Creating a Provider User

	Chapter Contents	
Staff Registering	g a Provider User	
	Staff Registers the User	

The steps for staff creating/registering a provider user are the same as those for the user registering themselves. However, staff will usually check to ensure the institution exists before creating the provider user.

# Staff Registering a Provider User

When staff create a provider user they will:

- Go to Manage Providers > Create a Provider User.
- Follow the same steps as a provider user would follow in their registration.

**Note:** The staff member should verify the provider institution exists before creating a provider user that will be associated with the institution. Normally the institution is created first.

Depending on system configuration, staff registering for the provider user may receive a

prompt to indicate if they also want to create a new institution account at the end of the user registration. Staff will often create the institution first, and enable the provider user immediately following their registration.



#### To create a Provider User:

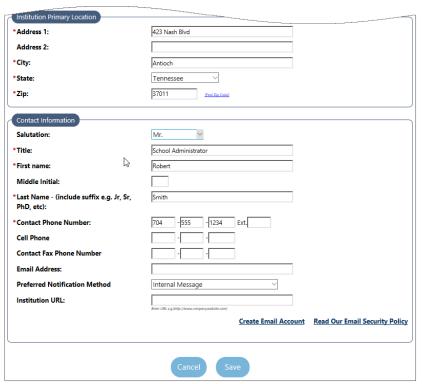
- 1 Create a unique User Name that falls within the guidelines noted.
- 2 Create a Password that falls within the specific guidelines as noted in the text next to the field.



Provider User Registration Form (top)



- 3 Confirm the Password by typing it again in the textbox.
- 4 Choose a Security Question from the drop-down list.
- Enter a Security Question Response. 5
- Enter a Federal Employer ID or Social Security Number and select the Type of Identification.
- 7 Enter the Institution Name.
- If the provider user who is registering is associated with an existing institution, enter the Institution Name, Code/BPA # (if known), and select the Institution Type from the drop-down list.
- Enter the Primary Location's address in the *Institution Primary Location* fields.
- 10 Enter the provider's primary contact person's title, name, and contact information in the Contact Information section.



Provider User Registration Form (bottom)

11 Click the **Save** button to save the registration form.

A Welcome message displays indicating that the registration was complete.

**Note:** Once a staff member performs the registration for the provider user, and the Welcome message displays, staff is automatically assisting the provider user.



Staff still needs to enable the provider user. They can immediately go to Manage Providers Assist a Provider, (or click on the Provider User's name in the Currently Managing group at the top of the left nav menu), to find and enable the provider user who they registered.





For more information about registering as a provider user, you can also access training videos in the Learning Center, such as a training video on the **Registration Process**.

## Next Steps After Staff Registers the User

Staff must enable both provider users and their associated provider institution before the provider user can create programs and apply for WIOA approval.

The basic steps for staff to enable a provider user (after they create a user) are:

- Select Assist a Provider.
- Select the Provider Users radio button to change to Provider User Criteria.
- Use search criteria to find the user (e.g., Access Status of *Pending Access* and a partial Institution name).
- Click an <u>Access</u> link for the Provider User in search results. This displays Provider User Access Rights.
- Change the Access Rights to Active.
- Enter applicable comments.
- Click the Save button.

For more details, see the topic, *Enabling a Provider User's Access*, in chapter 7.





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# 13: Viewing Provider Reports

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By Provider Reports	13-5
By Provider Contact Reports	13-7
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FAOs	13-8

# **Provider Reports (for Staff)**

The Reports section available to staff contains Provider Reports under the Detailed Reports area; these reports are divided into two categories – Eligible Training Provider (CRS) Reports, and general Provider Reports. The access screen looks similar to the following example. Staff with questions on other reports may wish to consult the latest edition of the *Virtual OneStop Staff User Guide*.



Detailed Reports Screen - Provider Reports Section

# Eligible Training (CRS) Reports

The Eligible Training Provider Reports are divided into seven different categories: <u>by Program</u>, <u>by Programs Status</u>, <u>by Provider</u>, <u>by Provider with ETPL Applications</u>, <u>by Program Performance</u>, <u>by Program Summary (with locations)</u>, and <u>by Program Contact</u>. The menu screen looks similar to the following example.



Provider Reports Screen Categories – Eligible Training Provider Reports





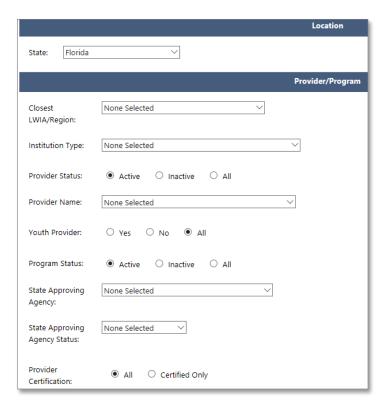
For more information about use of these CRS reports, you can access the training video in the Learning Center, or click this link to start the *Eligible Training Provider (CRS) Reports* video.

#### **By Program Reports**

Click on the <u>by Program</u> link in the <u>Eligible Training Provider (CRS)</u> category. Most of the information for this report is taken from general information entered pertaining to a provider's programs.

When the screen refreshes, staff can select a program by location, LWIA/Region, institution type (Two-year University, Public Adult School, etc.), provider status, provider name, whether it is a youth provider, program status, state approving agency, state approving agency status, and provider certification.

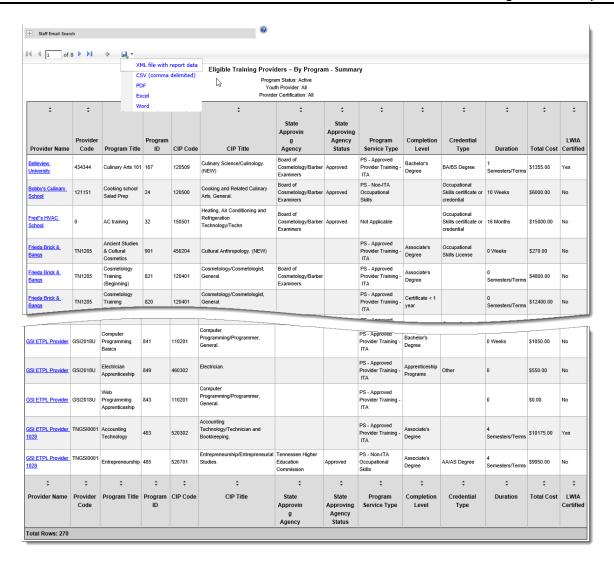
The filter screen appears in the following example.



Sample By Program Report Filters

Click the **Run Report** button located at the bottom of the screen. The report will appear based on your filters. You can save this report in XML (file with report data), CSV (Comma Separated Value), PDF, Excel, or Word formats. You can also email the report by clicking the <u>Staff Email Search</u> export button. The following is an example of a by Program report.





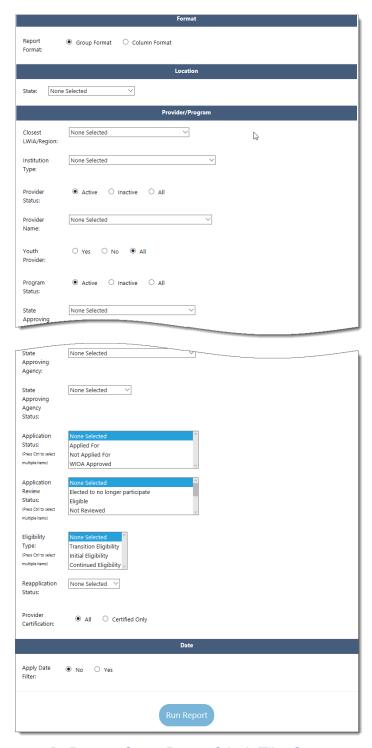
#### By Program Status Reports

Click on the <u>By Program Status</u> link in the <u>Eligible Training Provider (CRS)</u> category. Most of the information contained in this report is gleaned from staff information as it pertains to the current WIOA eligibility status of any given provider program. The report will generate results based on the Type of Program Status: *Not Reviewed, Eligible, Rejected, On Hold, Recommended, Re-applied,* and *Elected to no longer participate*.

When the screen refreshes, staff can select a program by format (view by Group Format or Column Format), location, LWIA/Region, institution type (Two-year University, Public Adult School, etc.), provider status, provider name, whether it is a youth provider, program status, state approving agency, state approving agency status, application status (*Not Applied For, WIOA Approved,* and *Applied For*), application review status (Elected to no longer participate, Eligible, Not Reviewed, *On Hold, Re-applied, Recommended* and *Rejected*), eligibility type, reapplication status, and provider certification.

The filter screen appears in the following example.



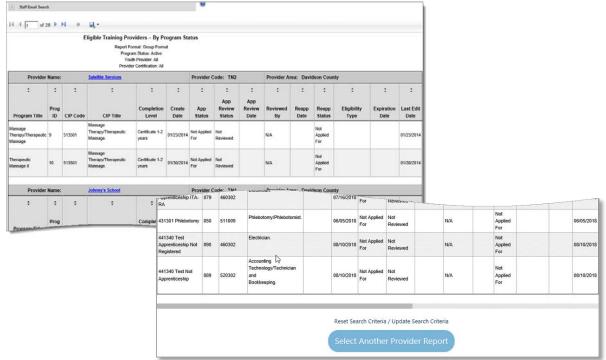


By Program Status Report, Criteria/Filter Screen

Click the **Run Report** button located at the bottom of the screen. The report will appear based on your filters. You can save this report in XML (file with report data), CSV (Comma Separated Value), PDF, Excel, or Word formats. You can also email the report by clicking the <u>Staff Email Search</u> export button. The following is an example of a by Program Status report.



The following is an example of the report.



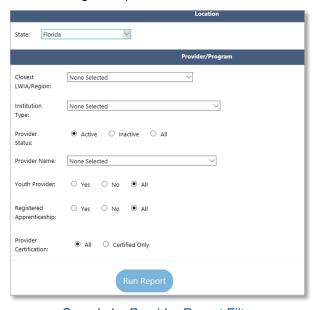
Sample Program Status Report

#### **By Provider Reports**

Click on the <u>by Provider</u> link in the **Eligible Training Provider (CRS)** category. Most of the information for this report is taken from the institution's general profile.

When the screen refreshes, staff can select a provider by location, LWIA/Region, provider type (Two-year University, Public Adult School, etc.), status, provider name, whether it is a youth provider, registered apprentice and provider certification.

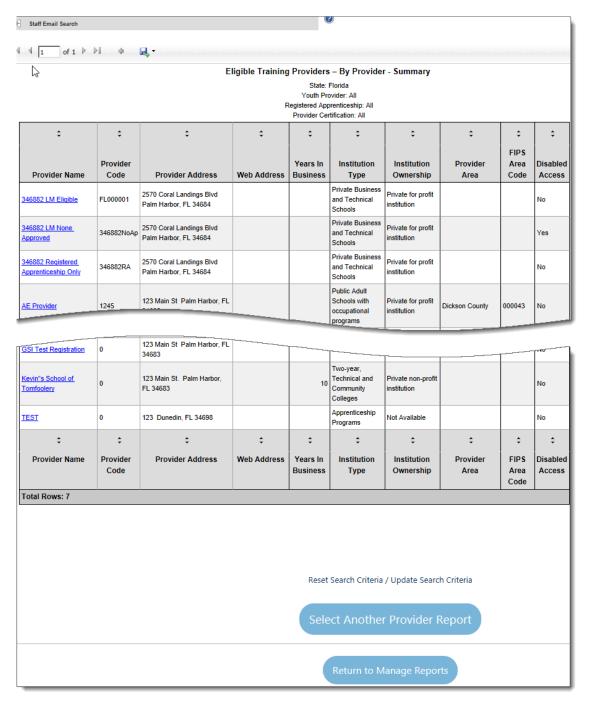
The filter screen appears in the following example.



Sample by Provider Report Filters



Click the **Run Report** button located at the bottom of the screen. The report will appear based on your filters. You can save this report in XML (file with report data), CSV (Comma Separated Value), PDF, Excel, or Word formats. You can also email the report by clicking the <u>Staff Email Search</u> export button. The following is an example of a by Provider report.



Sample Provider Report

Click the **Select Another Provider Report** button to view another CRS report, or click the **Return to Manage Reports** button to return to the reports menu screen.

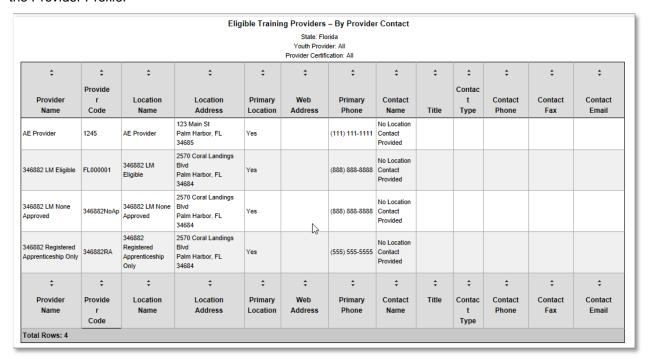


**Note**: At the top of the report screen, you may see a blue question mark and a link, which states: "This website wants to install the following add-on: 'MeadCo's ScriptX' from 'Mead & Company Limited'. If you trust the website and the add-on and want to install it, click here..." Installing this software is unnecessary, and you can ignore it.

#### **By Provider Contact Reports**

Click on the <u>By Provider Contact</u> link in the **Eligible Training Provider (CRS)** category. Most of the information for this report is taken from provider user registration.

This report will show all the registered provider users. Provider, Provider Sub-Name, Address, City, State, Zip, Contact Name, Title, Telephone, Fax, Email and Web Address are displayed if completed in the Provider Profile.



Sample by Provider Contacts Report

This report can be saved in XML (file with report data), CSV (Comma Separated Value), PDF, Excel, or Word formats. You can also email the report by clicking the <u>Staff Email Search</u> export button.

## **Provider Reports**

The Provider Reports under the Detailed Reports section are divided into three different categories: <u>by Contact</u>, <u>by Providers</u>, and <u>by Program</u>. The menu screen looks similar to the following example.



Provider Reports Screen Categories - Provider Reports



These reports provide details on providers in general.



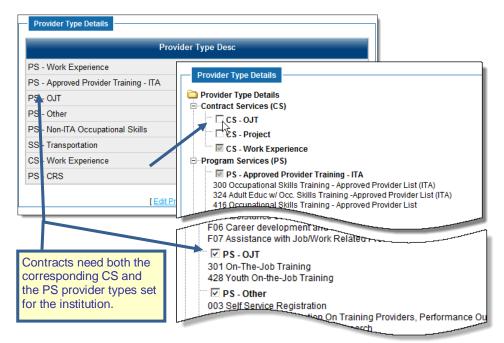
For more information about use of these provider reports, you can access the training video in the Learning Center, or click this link to start the *Provider Reports* video.

## **FAQs**

**Q:** I see three **Add** buttons on a Provider's Contracts tab. When I click the **Add** button for creating these contracts, some of them tell me I do not have the correct provider type. Is this a staff privilege I need, or a problem with setting up the provider institution?

**A:** If you see the message, then it is a problem with the set-up of Program Services types and Contract Services types for the provider. A pop-up message should indicate what types are still needed. For example, to add a new OJT contract, the provider must have the correct profile types for Contract Services (CS-OJT) as well as Program Services (PS-OJT) set up, in the Provider Type Details area. This is defined on the Provider Profile, General tab, in the Provider Type Details section (as shown below).

Note that there must also be services defined for the Program Services type (in Admin) in order for enrollments to occur related to that provider and contract.



Both CS and PS types are needed to add contracts.



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