Virtual OneStop®

Version 19

Provider Services User Guide

(Provider Representatives & Provider Staff)

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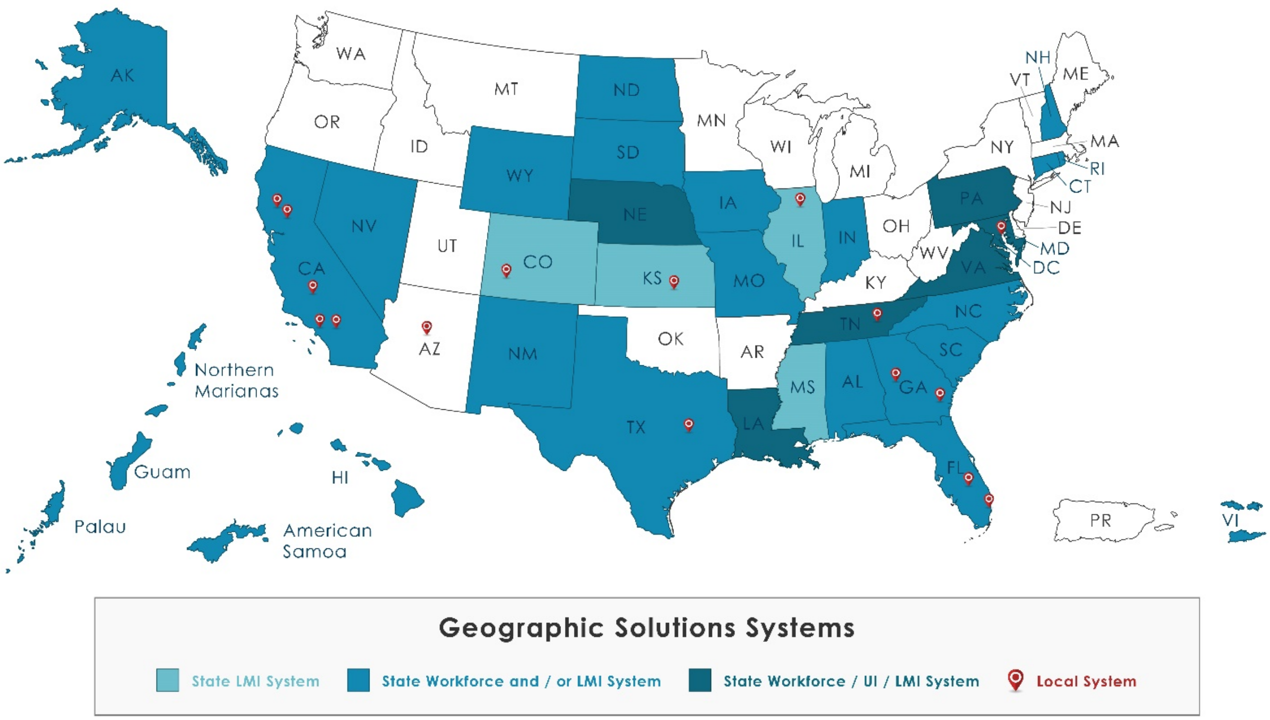

Date	Doc Version & Release #	Description
January, 2019	V19 (01-2019)	The first release for version 19 of Virtual OneStop functions for Provider Services, including the new Education and Training Program wizard and tabbed program entry section.
November, 2019	V19 (11-2019)	The second release for version 19 of Virtual OneStop functions for Provider Services, including the updated screens and functions for Provider User registration, and updated screens passed on newer .aspx web pages for Provider User Registration, Provider User Approval, and Provider User Profile pages.

Contents

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1: Provider Services – Overview & Quick Summary

Chapter Contents

Overview

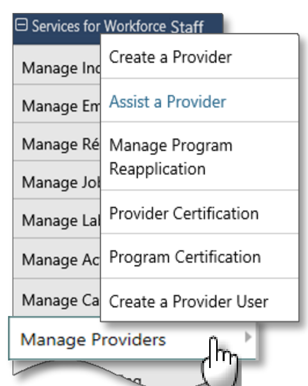
WIOA mandates that each state have a system or list for training providers that is the state's Eligible Training Provider List (ETPL). This is so that consumers can research career and training options suitable to their interests. The ETPL is also used to ensure that WIOA participants are enrolled in 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 Users *Provider Staff*

***Menus for Users & Staff** – both can maintain programs (only staff can certify providers and programs)*

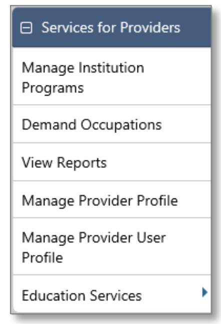
Provider Staff – These are staff members in Virtual OneStop who can create or assist the provider users, or they can directly create or manage the provider institution. Only Provider Staff can perform the review and WIOA certification of programs/courses.

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, 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**)

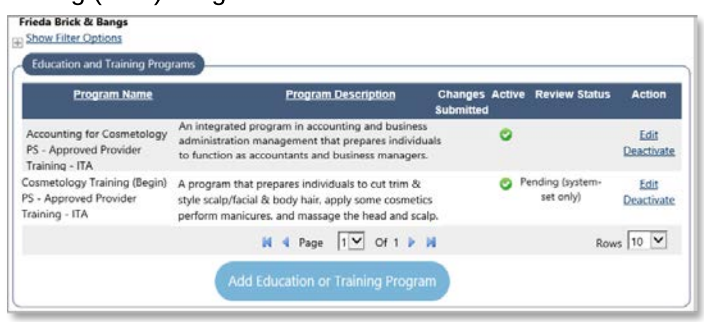
Provider Users must register in the system before they can create or manage programs, or submit programs for WIOA eligibility. If they are registering for a new institution, they may also be able to create the base data for the institution, as the second and third page of their registration, depending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

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

Note: *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.

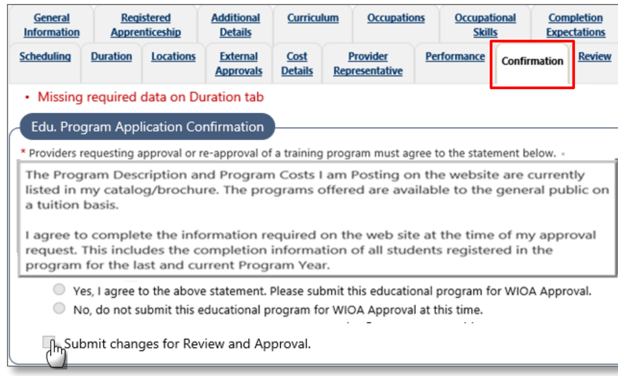
Tabs initially display as segments of a progress bar, and turn green as you complete them. If you leave the program and return, segments will show as tabs.

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).



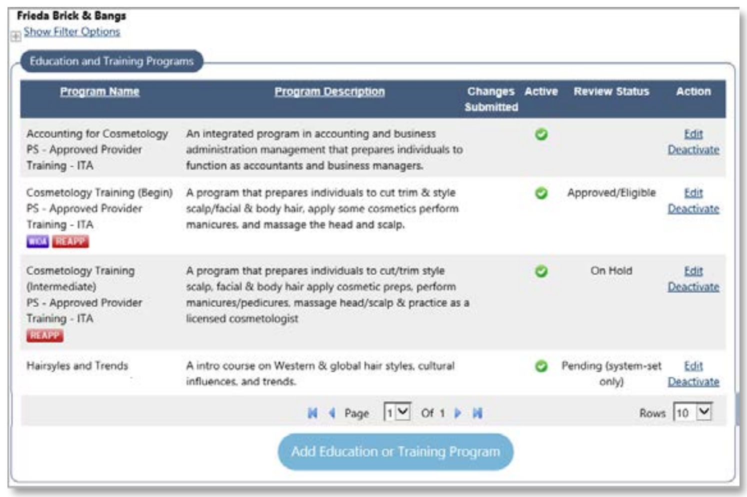
For details, see the topic, *Confirmation Tab – for WIOA Application Approval*, in chapter 3.

Note: *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 Edit 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.

Occupation Code	Occupation Title
11901303	Aquacultural Managers
29114100	Registered Nurses
29114101	Acute Care Nurses
29114103	Critical Care Nurses

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

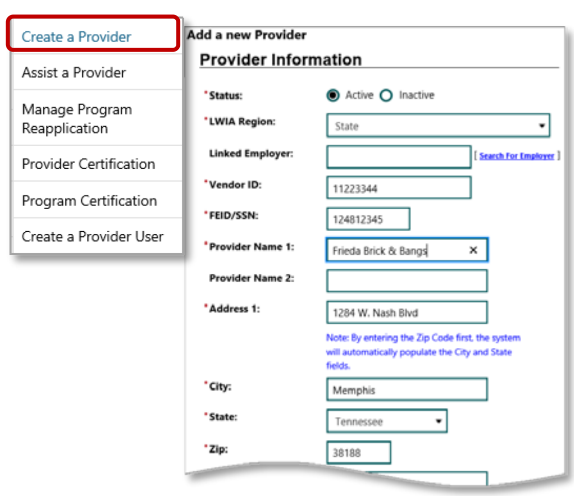
Some common functions/tasks performed by provider staff are briefly summarized below (with the menu option or path in parentheses).

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 three screens displays for entering data for the Provider Institution (show below).

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.) Staff will then progress through the screens for Provider Type Details, and for CRS Provider Information.



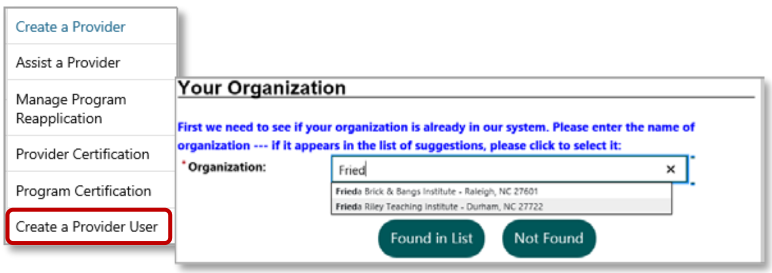
Creating a Provider Institution (as Staff)

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 when they complete the registration..

Note: *The registration starts with a* **Your Organization** *screen (shown below), which is identical to when provider users register themselves. This lets staff enter part of a name to find an existing Provider Institute, and click* **Found In List** *if it is already defined in the system, or select* **Not Found***, to enter the , to find the*



Creating a Provider User (as Staff)

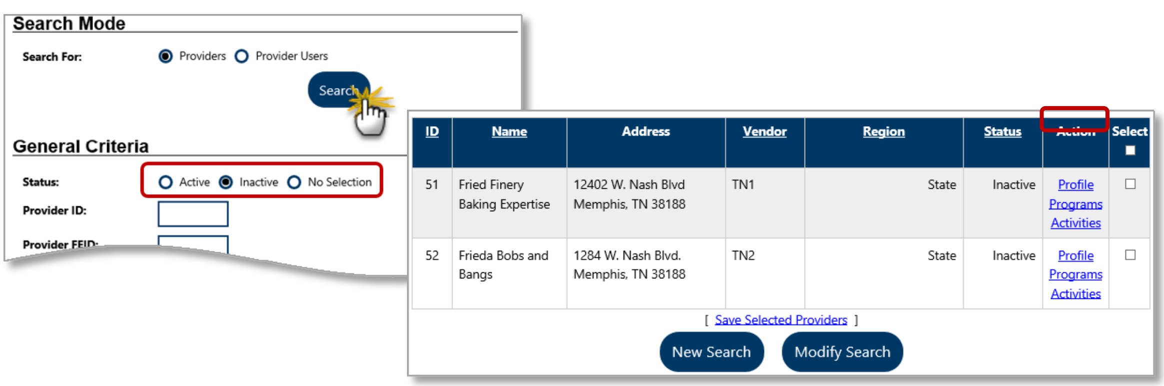
For details, see the topic, *Staff Registering a Provider User*, in chapter 12.

Activate a Provider (Manage Providers ▸ Assist a Provider ▸ General Info Tab)

New provider institutions must be activated by staff, and any new provider users associated to a provider must be enabled by staff, before the provider user can create programs for their institution 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 an *Inactive* status).
- Select the **Profile** from the results, to open the General tab.



Finding an Inactive Provider and Opening their Profile to the General Tab

- Click the **Edit Provider Details** link at the bottom of the Provider Details section.

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

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

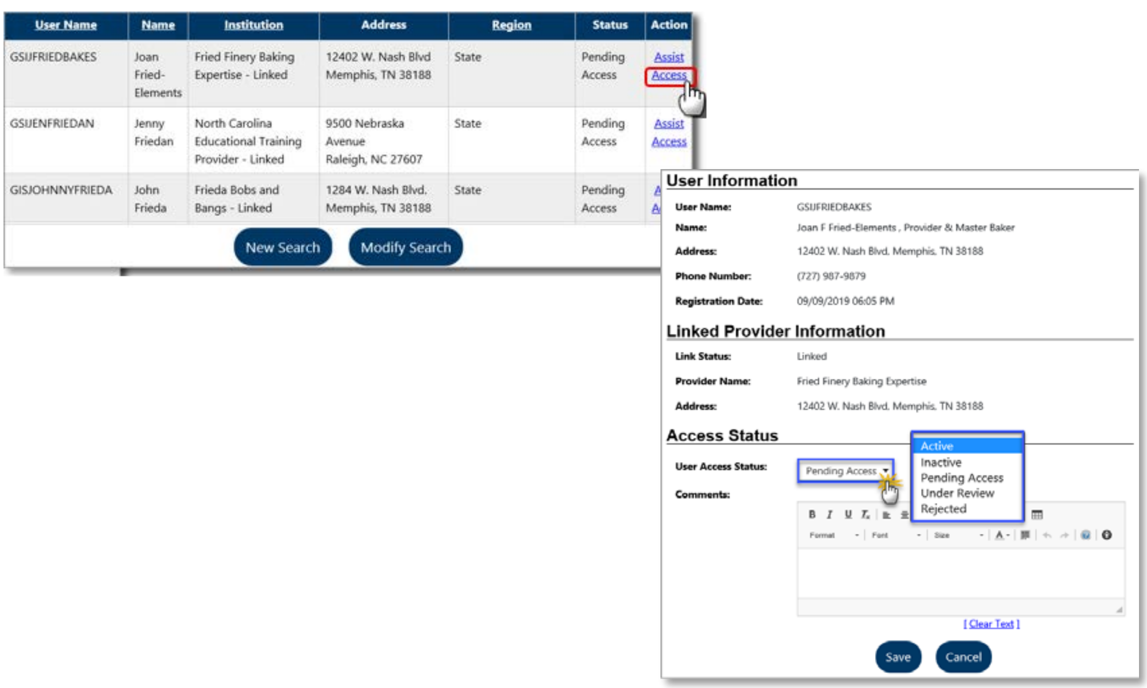
Note: *Staff can move to the provider's Provider Programs tabs to manage programs, after activation, or they can return to Profile Program and Activities tabs, at any time.*

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 name).
- 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.



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

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

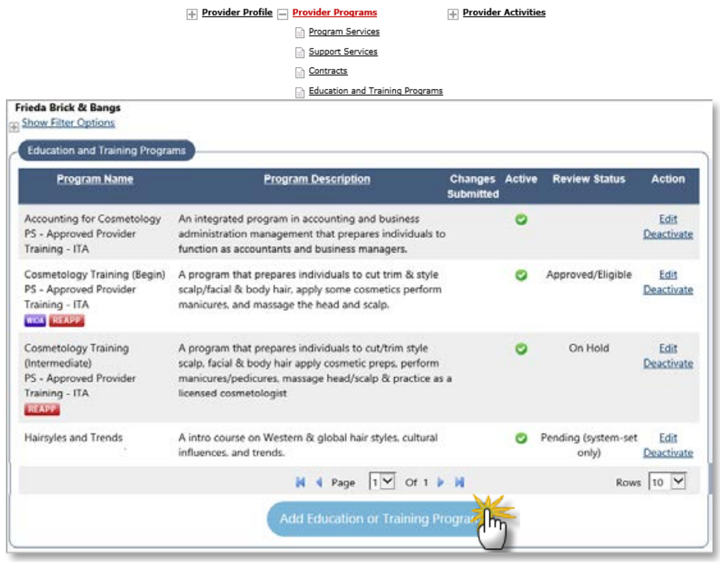
Add Programs/Courses (**Manage Providers ▸ Assist a Provider ▸ Programs ▸ E&T Tab**

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.

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.

Note: *Tabs initially display as segments 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.*

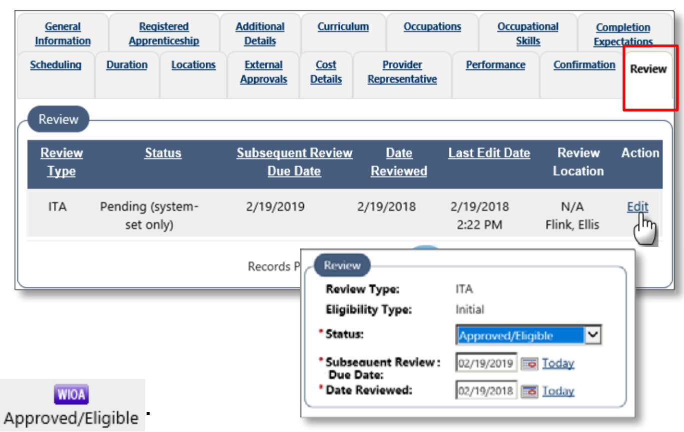
Approve Programs for WIOA (**Manage Providers ▸ Assist a Provider ▸ Programs ▸ E&T Tab**)

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 WIOA Approved/Eligible.

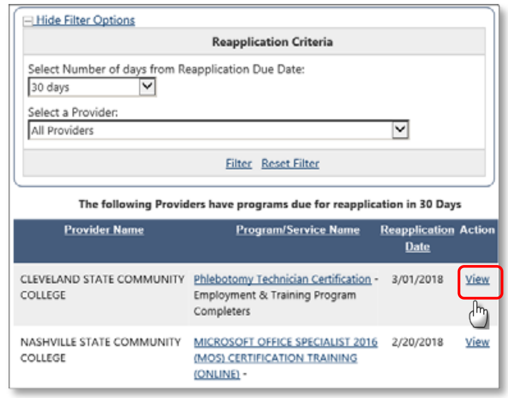


For details, see the topic, *Application Confirmation and Approval (WIOA Eligibility)*, in chapter 8.

Note: *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:

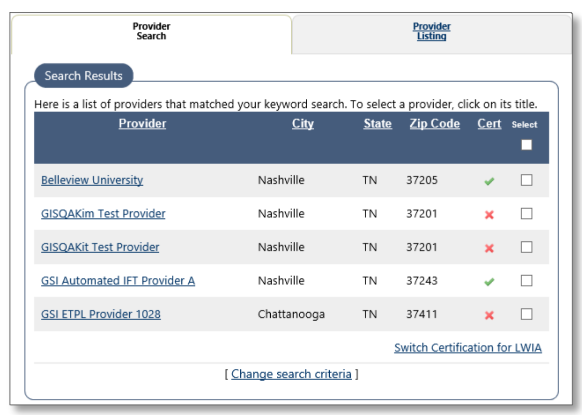
- Select the **Manage Program Reapplication** option. A list of programs due for reapplication is displayed. (Due within 30 days is the initial default.)
- Click the **View** link for a program in the list to open its details. From the Program tabs, select the last Review tab.
- Make changes to the Reapplication 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.

For details, see chapter 9, *Managing Program Reapplication*.

Note: *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)*.

2: Provider User: Initial Access

Chapter Contents

The Provider Services system lets provider users self-register to be a designated provider representative for managing an institution's programs. When you first register, the system will give you limited access, until a verification process takes place and staff gives enables your account. Until a staff member has reviewed your information and approved you, you will be in a Pending Access status. Once approved, you can conduct a large range of tasks without staff input, including managing the institution's programs, making changes to the institution's profile, and submitting programs for review/addition to an Eligible Training Provider List (ETPL).

Registration

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

The 'Not Registered?' Link or the 'Register' Button on a the Home Page

Potential provider users (i.e., representatives for an institution) must identify themselves as providers, and register as such, to access the system. Virtual OneStop sites that allow provider self-registration will offer Provider 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).

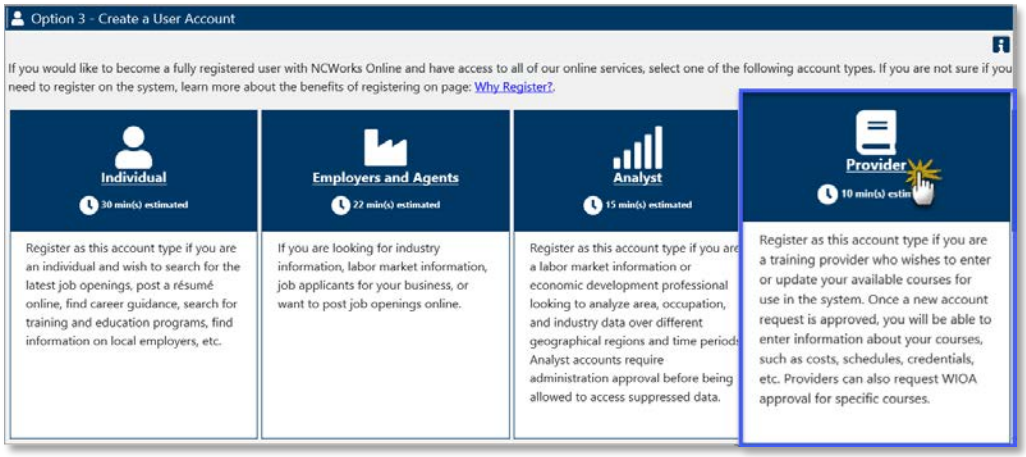
▶ **To register as a Provider User:**

1 From the Home Page, select the "*Not Registered Yet*?" link, or the **Register** button.

A screen will display for selecting the type of user account you want to create (as shown below).

Note: *The system basis the time estimate for each user type on an average of the registration times for previous registrants. This can give you an idea how long the basic registration may require.*

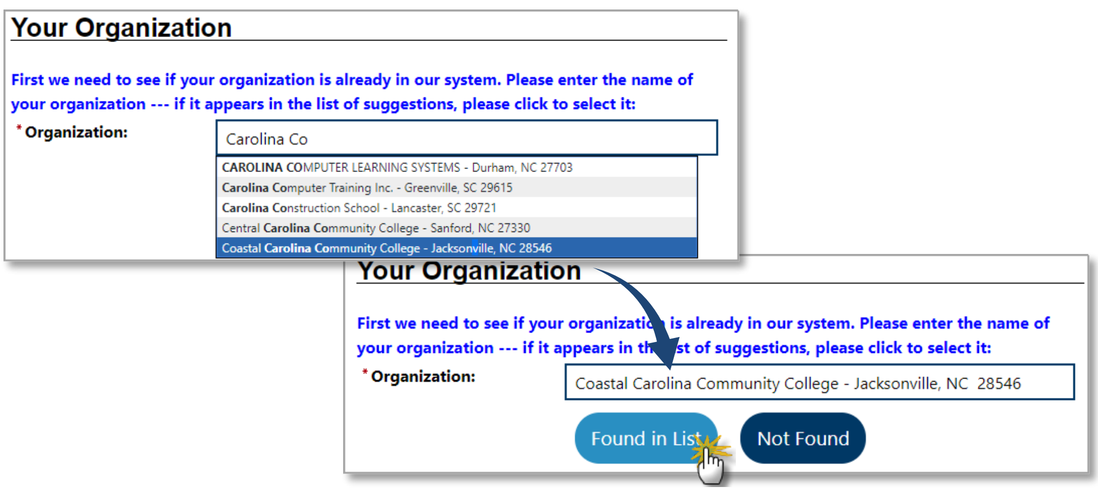
2 Select the Provider link, to start your Provider User registration.



A Provider Link Starts the Registration Process for a Provider User

The first screen to display for Provider registration is a **Your Organization** search screen. This helps you search for the name of your organization, and see if that organization (i.e., the institution for which you will be a Provider User), is already in the system.

3 Enter at least three characters of the name, and then select the correct organization from the displayed list, when your organization shows up (as shown below).



Your Organization, Found in List and Selected

4 Verify the name displayed in the Organization field, and then click the **Found in List** button.

The Provider User Registration screen is displayed (as shown in the next figure) with three areas: Organization Information, Enter Your Information, and Login Information.

Note: *Your site may be configured entry of an EIN number, rather than organization name.*

If so, enter the full EIN number, and click a **Find** *button to see if the organization displays. If it does, you will select it and follow the same steps used in the topic below.*

If the EIN is not displayed, you will follow the same steps shown for Registering as a Provider User (for a New Organization) starting with step 5 on page 2-4. The entered EIN will be locked on the screen. For a sample of the EIN number search, if your site displays it, see the topic, Registering as a Provider User (when EIN is required to start) on page 2-9.

Registering as a Provider User (for an Existing Organization)

You will continue the registration steps (described below) to register for the organization you found in the list. This will associate you as a Provider User for the existing organization, at the end of your registration.

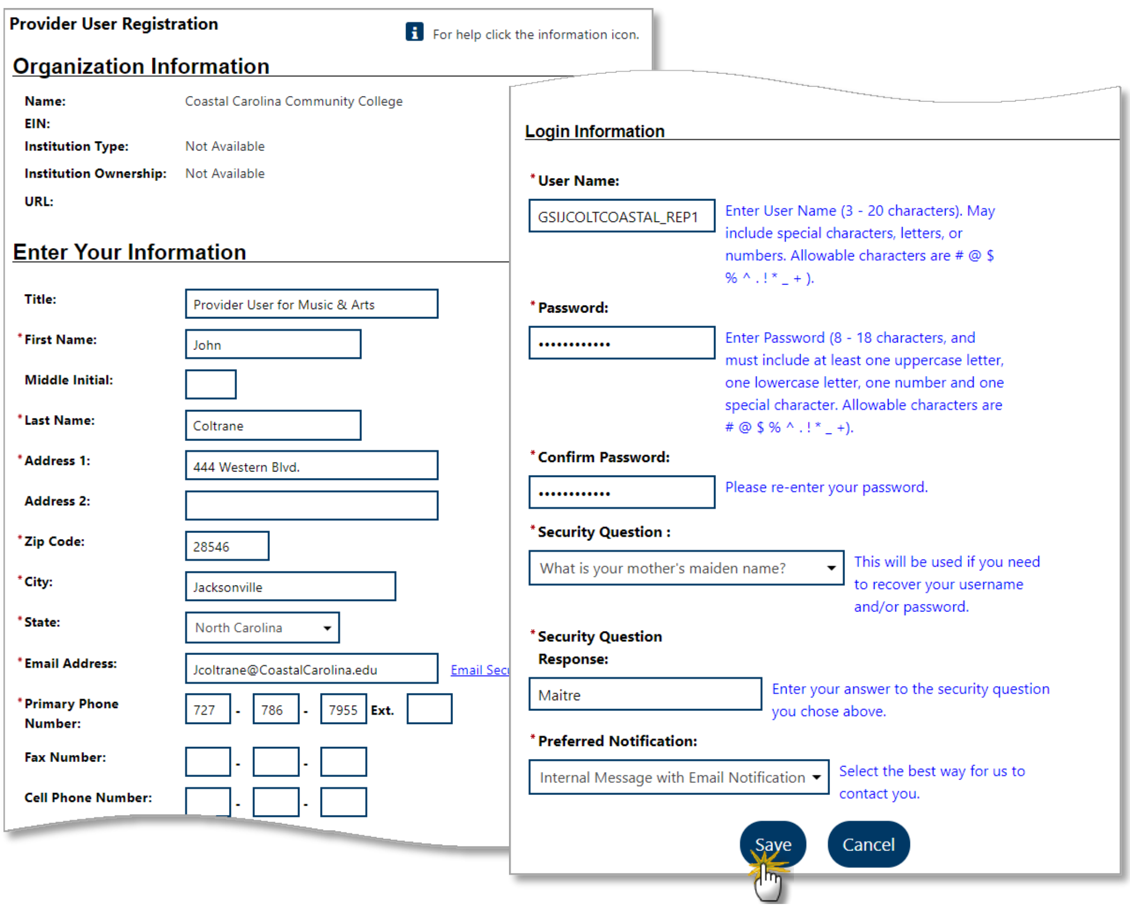
Note: *If you could not find your organization, you can click the* **Not Found** *button and follow similar steps for your Provider User registration. The steps will be followed by additional steps, and screens, to define the new Provider Organization that you will represent. See the topic, Registering as a Provider User (for a New Organization), staring on page 2-4, if you continue by clicking the* **Not Found** *button.*

5 Review the fields in the **Organization Information** area.

These are not entry fields – they are populated from data for the provider which you selected in the list (on the previous step). However, if you notice any incorrect entry (e.g., if the EIN number is wrong), you or a staff member will need to change the entry after the registration is completed.

6 In the **Enter Your Information** area, enter data about yourself related to your Provider Institution (enter all required fields, as well as any other known information). This includes:

- Your title
- Your name
- The institution address, zip code, city and state (this may be pre-filled if found in a list).
- Your email address (e.g., an email address for you, associated with the provider)
- Your Primary Phone Number



Enter Your Information Section and Login Information Section

7 In the **Login Information** area, enter your desired security access and notification information for accessing your Provider User account. This includes:

- User Name
- Password
- Confirm Password

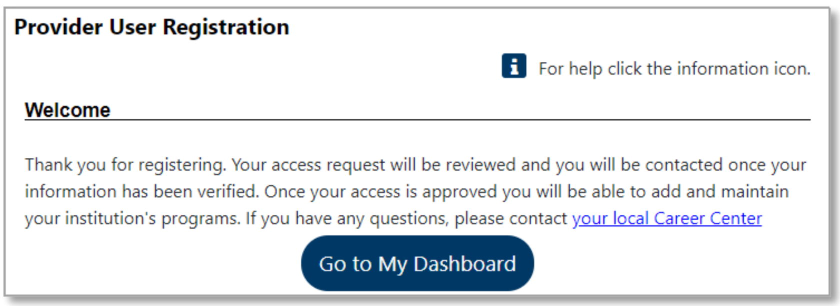
Note: *Create a unique User Name and Password that falls within specific guidelines as noted in blue text next to the field. Remember your User Name and your Password; both are needed to access the system.*

- Security Question
- Security Response
- Preferred Notification Method.

8 Click the **Save** button. A Welcome message indicates that your registration is complete.

The Welcome message confirms your registration, and indicates that you will be contacted once the information is verified (via your preferred Notification method).

Note: *Until your registration is verified (i.e., until your* Pending Access *status is changed to* Enabled *by staff), you can login as a Provider User, go to your dashboard, and access some menu options. However, your access to options will be limited. For example, you will not be able to set up any course information for your Provider Institution, or make basic changes in their Provider Profile.*



Registration Confirmation and Welcome Screen

Videos: *A Training Video for the "Registration Process" may also be available. See the topic, Learning Center (Provider Courses) in chapter 4.*

Registering as a Provider User (for a New Organization)

If you cannot find your organization, as part of the first steps for registering as a Provider User, then you will need to click the **Not Found** button (as indicated in step 4 below), in order to register as a Provider User for a new organization that you will add to the system.

The initial steps for registering for a new organization are similar to those for registering as a Provider User for an existing organization (i.e., a *found* organization), except that you must also enter basic information in an Organization Information area (as indicated in step 5 below).

You will then continue the registration steps (indicated below) to register for the organizations you found in the list. The completion of the steps for your Provider User registration will be followed by additional steps, and screens, to define the new Provider Organization that you will represent.

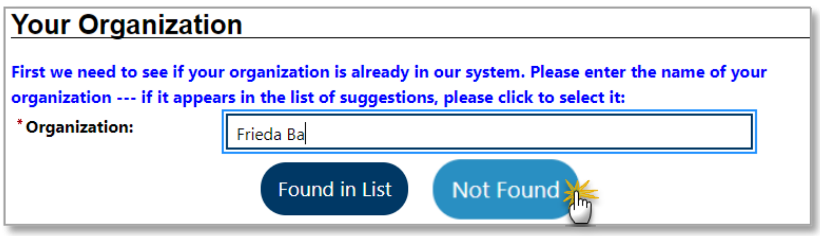
To register as a Provider User (for a New Organisation):

1. From the Home Page, select the "*Not Registered Yet*?" link, or the **Register** button.
2. Select the Provider link, to start your Provider User registration.

A Provider Link Starts the Registration Process

The first screen to display is a **Your Organization** search screen.

3. Start to enter your organizations information in the **Organization** field. If your organization does not exist yet, you will not be able to find it.
4. Click the **Not Found** button (as shown below).

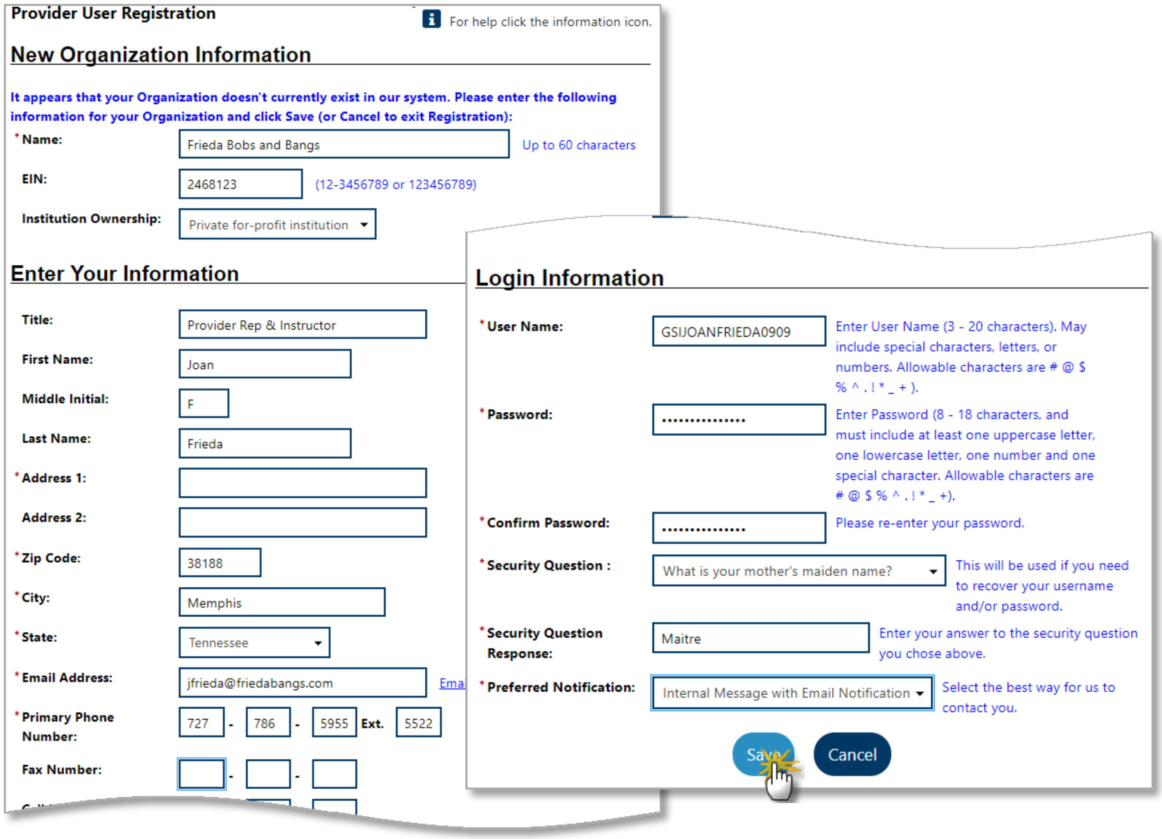


Selecting Organization 'Not Found'

The Provider User Registration screen is displayed (as shown on the next page) with three areas: New Organization Information, Enter Your Information, and Login Information.

Note: *If you are able to find your organization in a displayed list, or if you need more information on the first steps, see these steps in the previous topic, Registration on page 2-1.*

5. In the **New Organization Information** area, enter data about your Provider Institution, which includes the required fields:
   - Institution Name
   - Institution EIN number
   - Institution Ownership (e.g., Private for-Profit, Private non-profit, Public institution)
6. In the **Enter Your Information** area, enter data about yourself related to your Provider Institution (enter all required fields, as well as any other known information). This includes:
   - Your job title
   - Your name
   - The institution address, zip code, city and state (this may be pre-filled if found in a list).
   - Your email address (e.g., an email address for you, associated with the provider)
   - Your Primary Phone Number
   - Fax Number and/or Cell Phone Number (these are not required fields and may depend on you system and state's business rules)



Enter Your Information Section and Login Information Section

7 In the **Login Information** area, enter your desired security access and notification information for accessing your Provider User account. This includes:

- User Name
- Password
- Confirm Password

  Note: *Create a unique User Name and Password that falls within specific guidelines as noted in blue text next to the field. Remember your User Name and your Password; both are needed to access the system.*

- Security Question
- Security Response
- Preferred Notification Method.

8 Click the **Save** button.

Upon successful completion of your registration (for association with a new provider institution), you are logged into the system with limited access as a Provider User, and with the first screen displayed for adding your Provider Institution.

You will continue through this screen as one of two additional screens/pages your will complete to also create the new account for your institution. The General Tab will display at the end of your complete registration.

Note: *Your site may be configured to not allow a registering Provider User to also enter data for a new provider institution. If so, the next Provider Institution screens will not display. You* *will only see a Welcome message that also indicates how to contact staff for the creation of your Provider Institution.*

The Add a New Provider Information screen (shown below) displays three areas:

- Provider Information (partially pre-filled from your entries on a previous screen)
- Billing Address
- Mailing Address

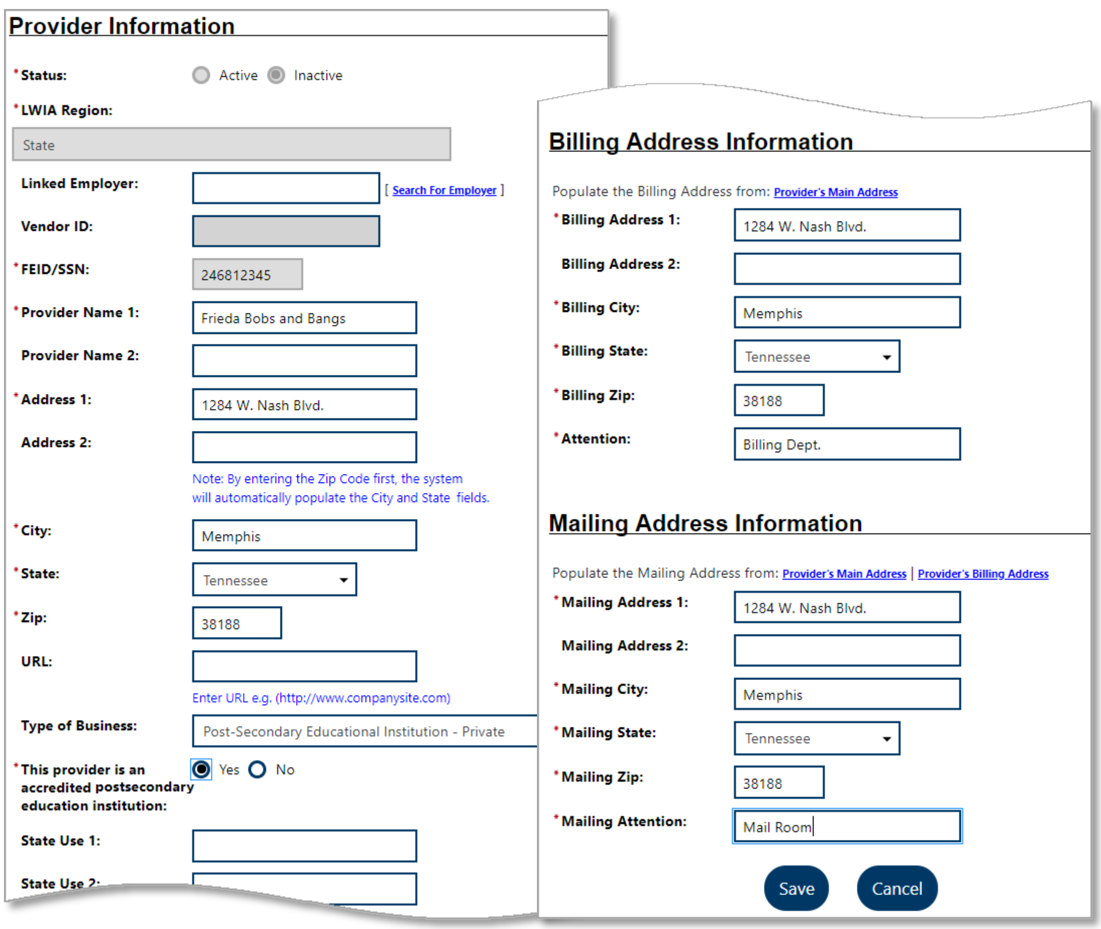
9 Review and adjust data on the Provider Information screen.

- Review the fields in the Provider Information area, and make changes if needed.

  Note: *Information is disabled that is only for staff entry, such as marking the institution as Active, or editing the Vendor ID or FEIN.*

- Enter a billing address and mailing address (using links or manual entry).
- Enter an individual for contact in the Attention field, for both types of addresses.

  Note: *Billing and mailing addresses are required, but the address can be copied from the previous address, using a link at the top of each area.*



Provider Information Screen (for New Provider)

Note: *This is the same screen which staff will start with if they create the institution for you, except that:*

1) Some of the information is prefilled for you (as provider user) based on your registration data.
2) As the provider user, you will not go any further than the Provider Information screen (above),

and the following CRS Provider Info screen (below) in registration. Staff can continue to define the details of the provider type data, and approve/enable the institution, as part of creation.

10 Click **Save**.

The CRS Provider Information screen is displayed (as shown below). It contains information which staff requires before they will mark the provider institution as *Active*.

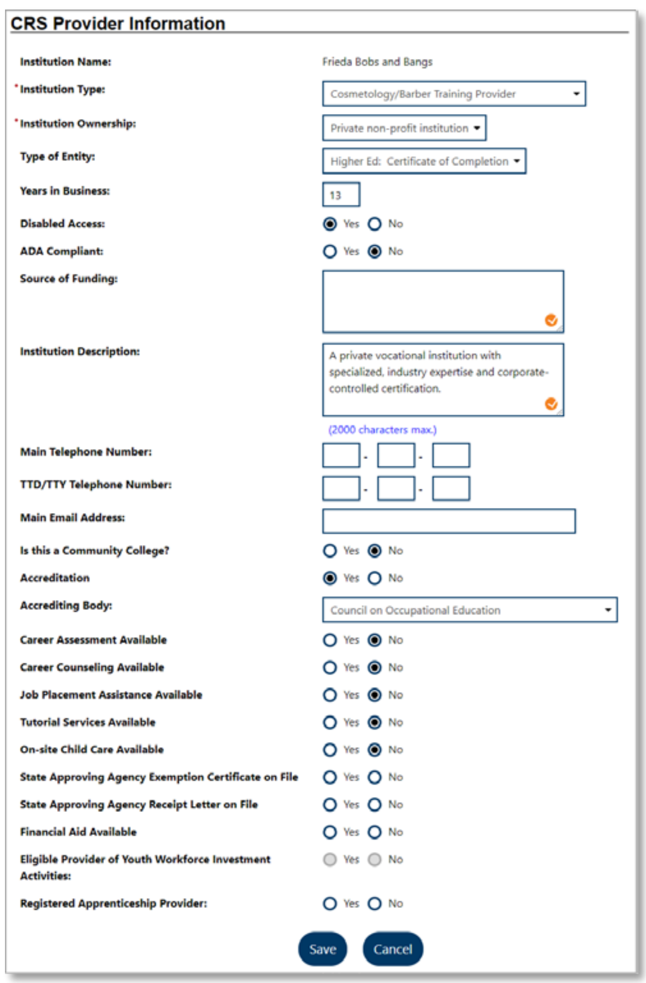
You should complete all fields, as the provider user, if known. However, only two fields are required.

- Select the Institution Type (from drop-down list).
- Select the Institution Ownership (from drop-down list).

Note: *Normally this is the same Ownership entered in the New Organization Info on the first screen.*

11 Review and answer all other questions and prompts, as accurately as possible, for known provider information.

Note: *You may not be certain of answers to sine prompts, such as "*Accreditation*". If you select* 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. Most selections are not. If field include required Yes/No selections and you are not sure, select* No*).*


CRS Provider Information

Institution Name:	Frieda Bobs and Bangs
*Institution Type:	Cosmetology/Barber Training Provider
*Institution Ownership:	Private non-profit institution
Type of Entity:	Higher Ed: Certificate of Completion
Years in Business:	13
Disabled Access:	Yes / No
ADA Compliant:	Yes / No
Source of Funding:	
Institution Description:	A private vocational institution with specialized, industry expertise and corporate-controlled certification. (2000 characters max.)
Main Telephone Number:	- -
TTD/TTY Telephone Number:	- -
Main Email Address:	
Is this a Community College?	Yes / No
Accreditation	Yes / No
Accrediting Body:	Council on Occupational Education
Career Assessment Available	Yes / No
Career Counseling Available	Yes / No
Job Placement Assistance Available	Yes / No
Tutorial Services Available	Yes / No
On-site Child Care Available	Yes / No
State Approving Agency Exemption Certificate on File	Yes / No
State Approving Agency Receipt Letter on File	Yes / No
Financial Aid Available	Yes / No
Eligible Provider of Youth Workforce Investment Activities:	Yes / No
Registered Apprenticeship Provider:	Yes / No

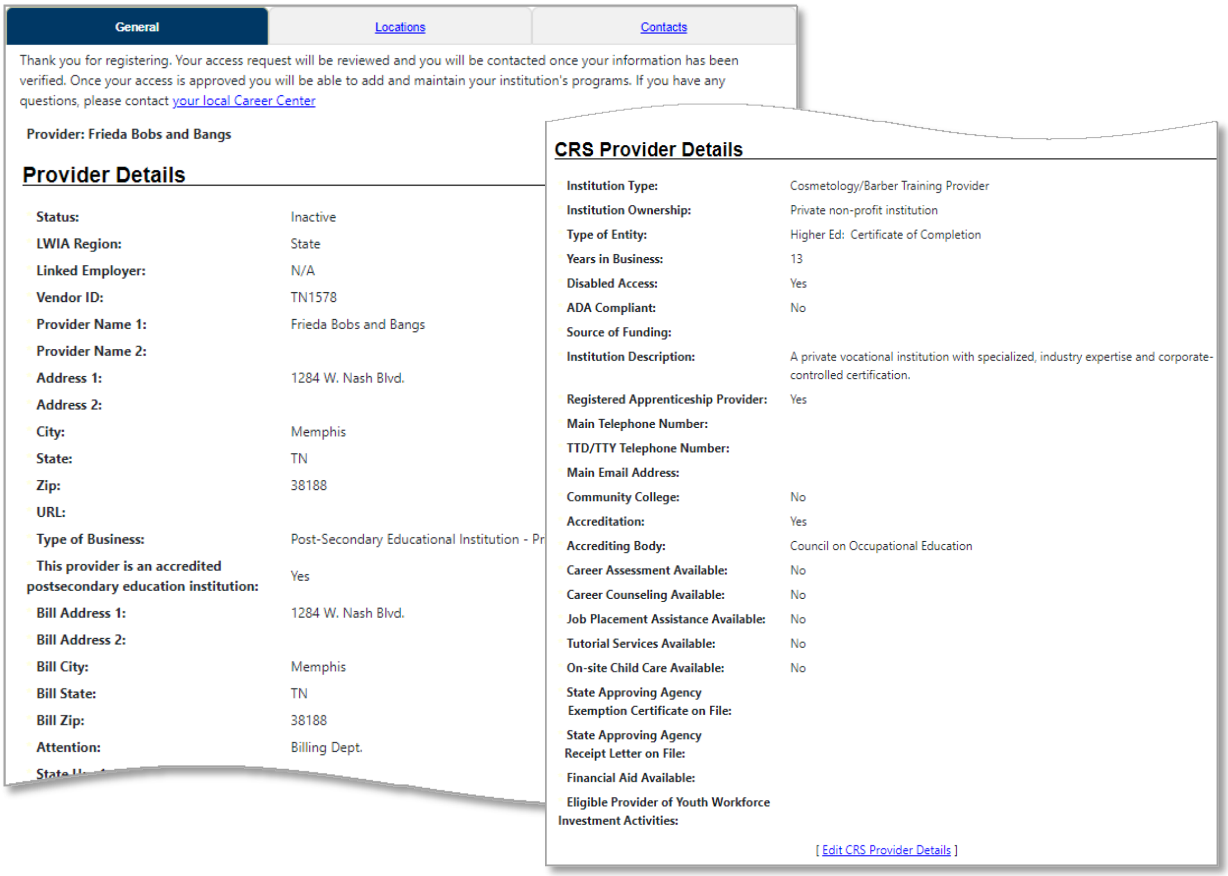
Save Cancel

CRS Provider Information Screen

Note: *This screen collects data for your institution, that is also available, later, by selecting,* **Manage Provider Profile ▸ General tab ▸ CRS Provider Details** *from the menu.*

12 When you are done making all entries on the screen, click the **Save** button.

The General tab will be displayed with the information that you have saved for Provider Details and for the CRS Provide Details (as shown below).



Sample Provider General Tab and Provider Details sections

Note: *If a Thank You message is configured for Provider creation, it will display below the tabs, along with the link for contacting Career Center staff for any questions on access (as shown in the top of the screen above).*

Your left-navigation menu options will remain limited, form this point, until a staff member reviews and enables your user account, and they activate your Provider Institution.

Registering as a Provider User (when EIN is required to start)

If your site is configured for entry of an EIN number to start your registration as a provider user (rather than an organization name), the first screen you will see after clicking the Provider link is a search to see if the EIN for your provider organization is already in the system (as shown on the next page).

▶ **To register as a Provider User (searching by EIN):**

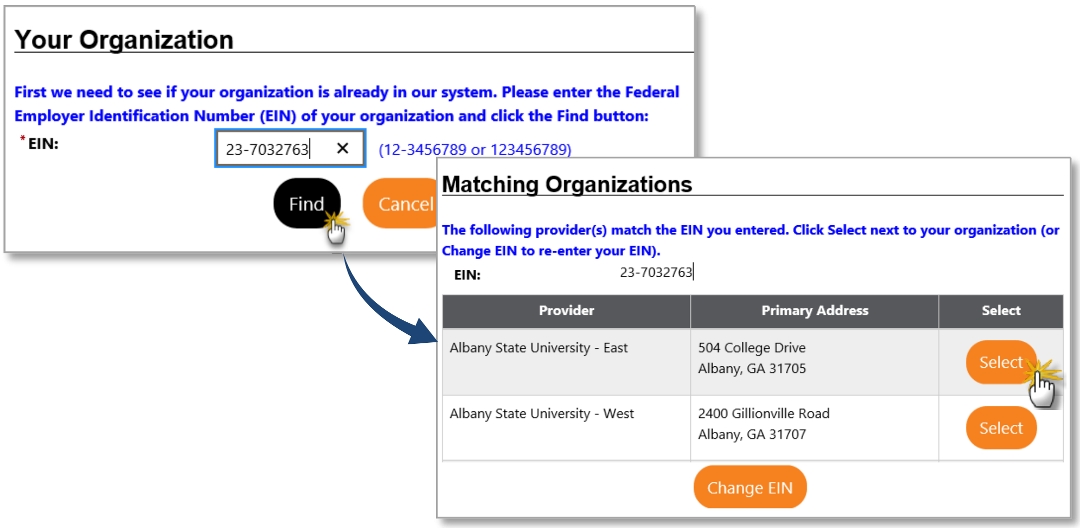
1 From the Home Page, select the "*Not Registered Yet*?" link, or the **Register** button.

2 Select the Provider link, to start your Provider User registration.

A Provider Link Starts the Registration Process

The first screen to display is a **Your Organization** search screen.

3 Enter the full EIN number for your organization in the **Organization** field, and click the **Find** button (as shown below).



Your Organization, Provider(s) matched by EIN

4 If existing providers are found for the EIN, click **Select** for the matching provider (as shown above).

The **Provider User Registration** screen is displayed with three areas: New Organization Information, Enter Your Information, and Login Information.

You will continue, following the same steps previously shown under the topic, Registering as a Provider User (for an Existing Organization), starting with step 5 on page 2-3.

5 If no existing providers are found for the EIN, the **Provider User Registration** screen is opened with blank fields (for New Organization Information). Only the EIN number is shown (and locked).

You will follow the same steps shown for Registering as a Provider User (for a New Organization),starting with step 5 on page 2-4

My Provider Workspace (& My Dashboard)

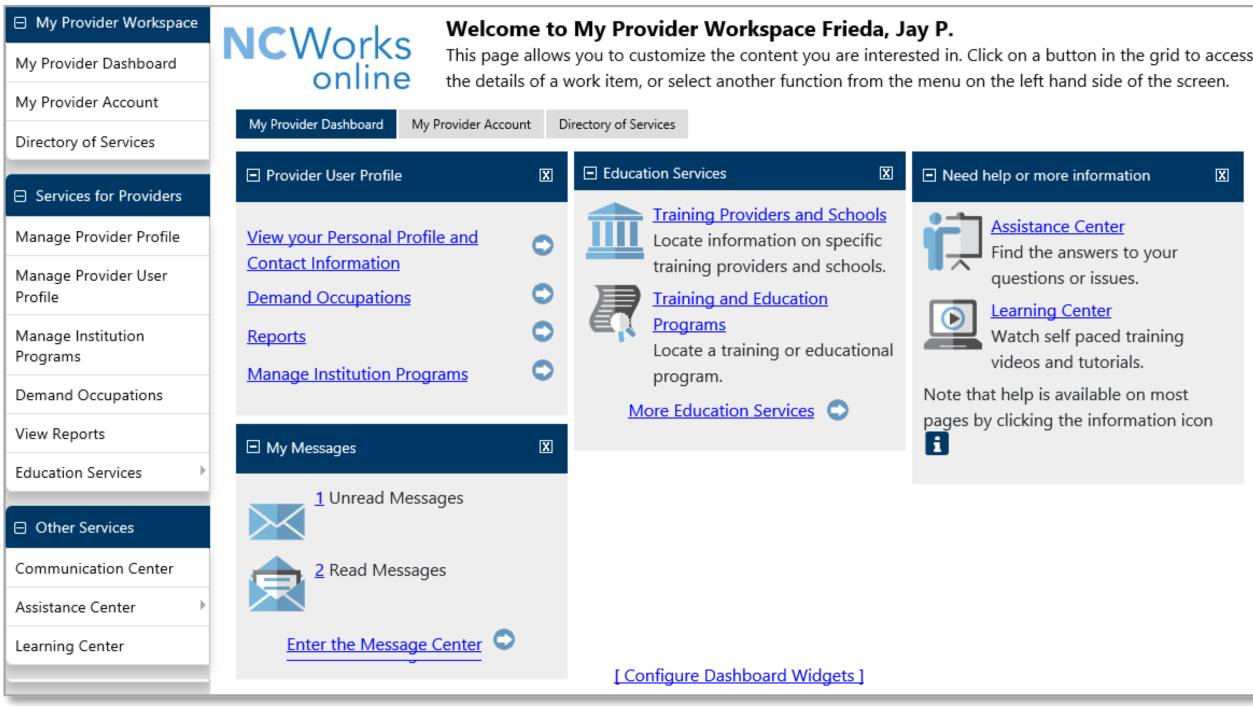
Once your full access as a provider user is enabled by staff, the ***My Provider Workspace*** menu group will display at the top of the left Navigation pane (as shown in the figure below) with several options. These are quick links to options that are also accessible through the links at the top of the main screen. The menu options/links let provider users 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 Welcome Page at Log On

Note: *For Provider Users, all the links on dashboard widgets are to items or options that also accessible through the navigation menu options. A* **Return To My Dashboard** *button is also displayed at the bottom of many screens, to quickly return to this Dashboard page.*

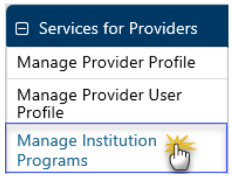
[This page is intentionally left blank.]

3: Provider User: Services for Providers

Chapter Contents

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 menu options they will use to manage their own Provider User profile, manage their institution's Provider Profile, and manage their institution's programs, as well as reviewing In Demand occupations, view Provider Reports, and researching Education Services.

The most common task that the Provider User will perform is maintaining program information to ensure that the listed programs for their institution remain eligible and approved. The option **Manage Institution Programs** may display in the middle of the Services Provider menu group (as shown below). However, it is discussed first in this chapter, since it lets the provider user create or modify specific courses and programs that their provider institution offers, which is what they will do most often in the system.

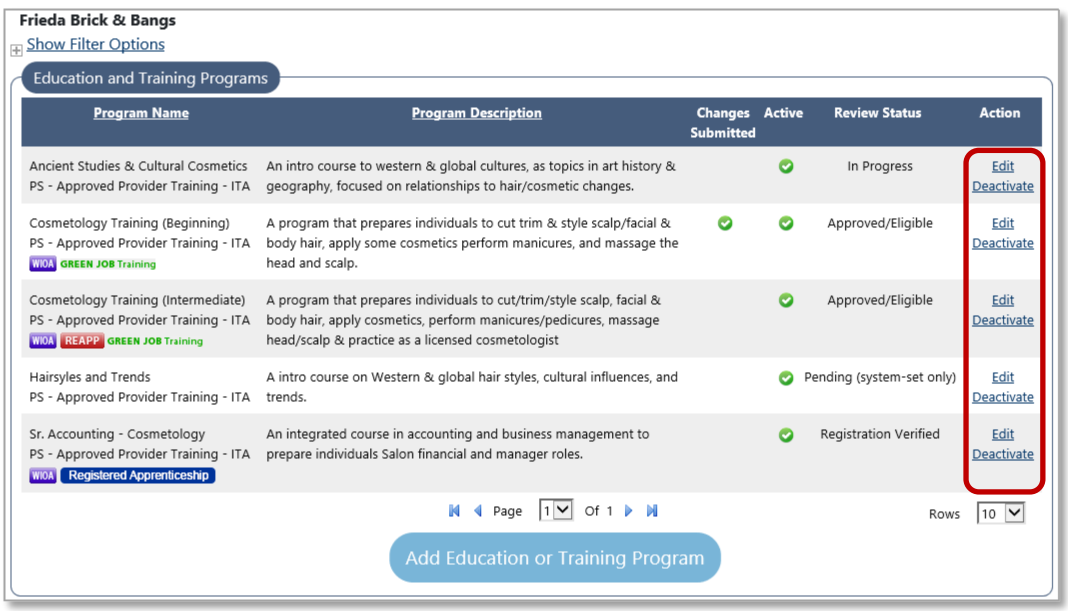


Menu Selection to Manage Programs

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 Edit 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.



Frieda Brick & Bangs
Show Filter Options
Education and Training Programs

Program Name	Program Description	Changes Submitted	Active	Review Status	Action
Ancient Studies & Cultural Cosmetics PS - Approved Provider Training - ITA	An intro course to western & global cultures, as topics in art history & geography, focused on relationships to hair/cosmetic changes.		✔	In Progress	Edit Deactivate
Cosmetology Training (Beginning) PS - Approved Provider Training - ITA WIOA GREEN JOB Training	A program that prepares individuals to cut trim & style scalp/facial & body hair, apply some cosmetics perform manicures, and massage the head and scalp.	✔	✔	Approved/Eligible	Edit Deactivate
Cosmetology Training (Intermediate) PS - Approved Provider Training - ITA WIOA REAPP GREEN JOB Training	A program that prepares individuals to cut/trim/style scalp, facial & body hair, apply cosmetics, perform manicures/pedicures, massage head/scalp & practice as a licensed cosmetologist		✔	Approved/Eligible	Edit Deactivate
Hairsyles and Trends PS - Approved Provider Training - ITA	A intro course on Western & global hair styles, cultural influences, and trends.		✔	Pending (system-set only)	Edit Deactivate
Sr. Accounting - Cosmetology PS - Approved Provider Training - ITA WIOA Registered Apprenticeship	An integrated course in accounting and business management to prepare individuals Salon financial and manager roles.		✔	Registration Verified	Edit Deactivate

Page 1 Of 1 Rows 10

Add Education or Training 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 to filter longer lists, based on Program Type, Program Name, Review Status, etc. In other words, you can list only courses that are Active, or Inactive. You can also can filter by a Program Type (e.g., Approved Provider Training – ITA, Training – Non-ITA), and/or the Approval Status (e.g., Rejected, Pending, Approved, In Progress).*

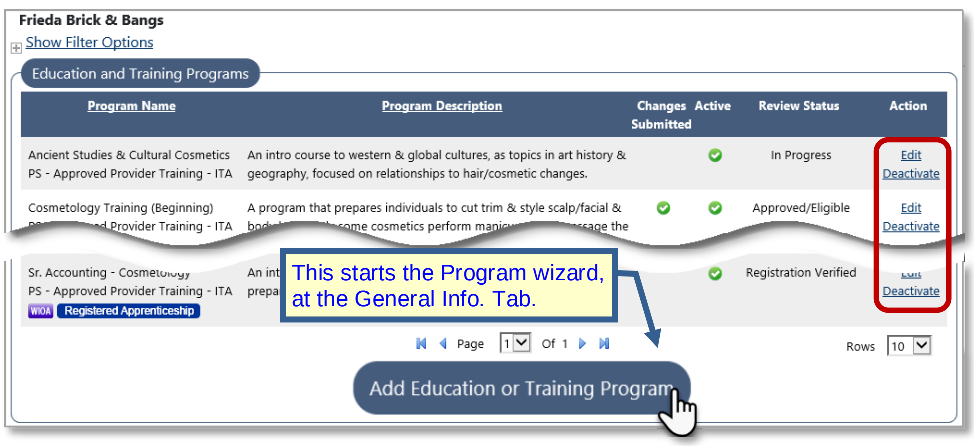
Staff assisting Providers also see tabs of a Portfolio tree above the list (for areas only staff use).

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 3-6, to the *Confirmation Tab* on page 3-26).

   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, they will see tabs rather than the green Progress Bar segments that display during the initial entry.*

3 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

Program Tab Name	Program Tab Description
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 ***No***. If you click ***Yes,*** the question "*This Education Program is a Registered Apprenticeship*?," displays. If this answer is ***No*** to either question, you can simply click, **Next**. If you pick ***Yes*** 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 **Next** 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: *Course Time* lets you define hours in class time, lab time, other time, and frequency. *Reporting Info* requires you to identify the program format (in-person, on-line, hybrid) and the total program length (in hours and in weeks). Reporting Info is required for WIOA reporting.

Program Tab Name	Program Tab Description
Duration Tab	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 *primary* 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.
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: • Select *Yes,* if they want to proceed and submit the data in the previous tabs for WIOA approval (or re-approval). • Select *No*, if they want to continue and simply save all data entered so far. ***Note:*** *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 **Next**) 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.

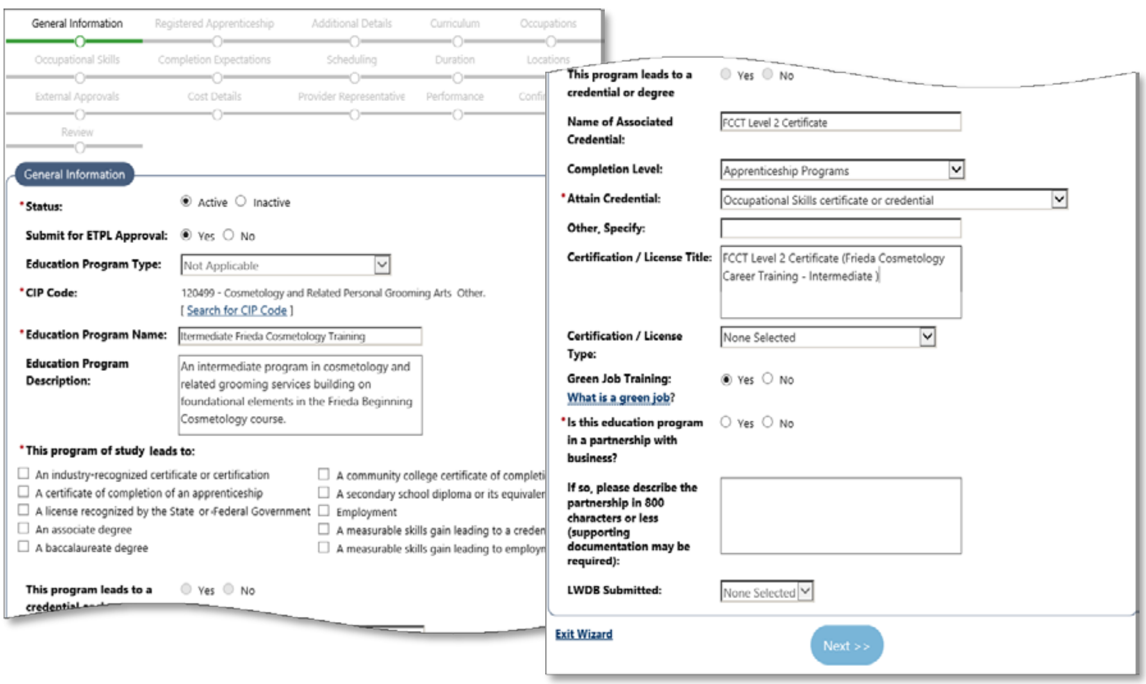
Complete all required entries to classify the program:

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*.

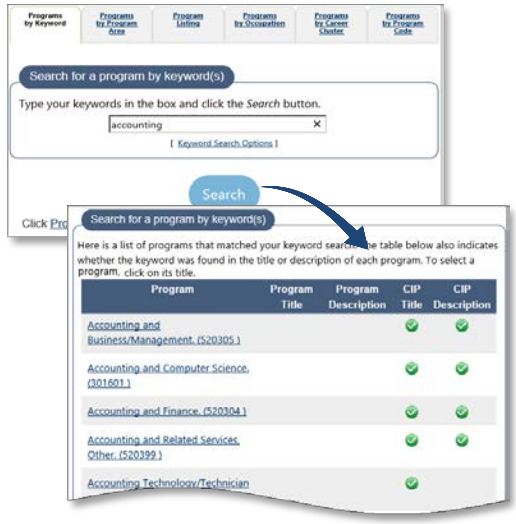
Education Program Type is a disabled field. [The Type is only entered by staff, after your initial program submission.]



General Information Tab (Base Program Classification Details)

Use the 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 ⓘ, 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 bya 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).

ⓘ 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.*

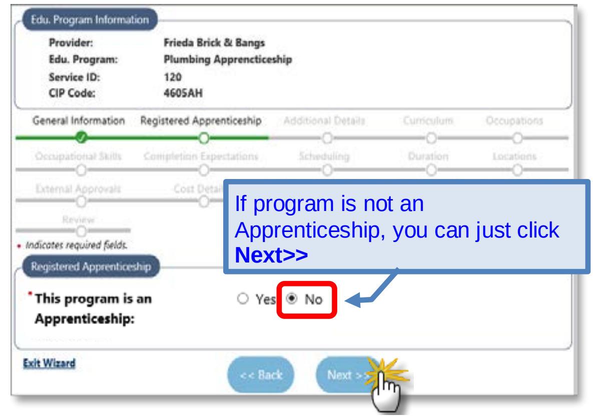
CIP Code: *The CIP code is used as a cross-walk to control O*NET occupations can be related to this program/course in later definitions. Once it is selected, the Program Description will pre-fill with related CIP information.*

*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.*

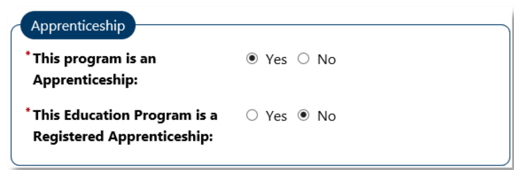


Registered Apprenticeship Tab (Default prompt

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*?

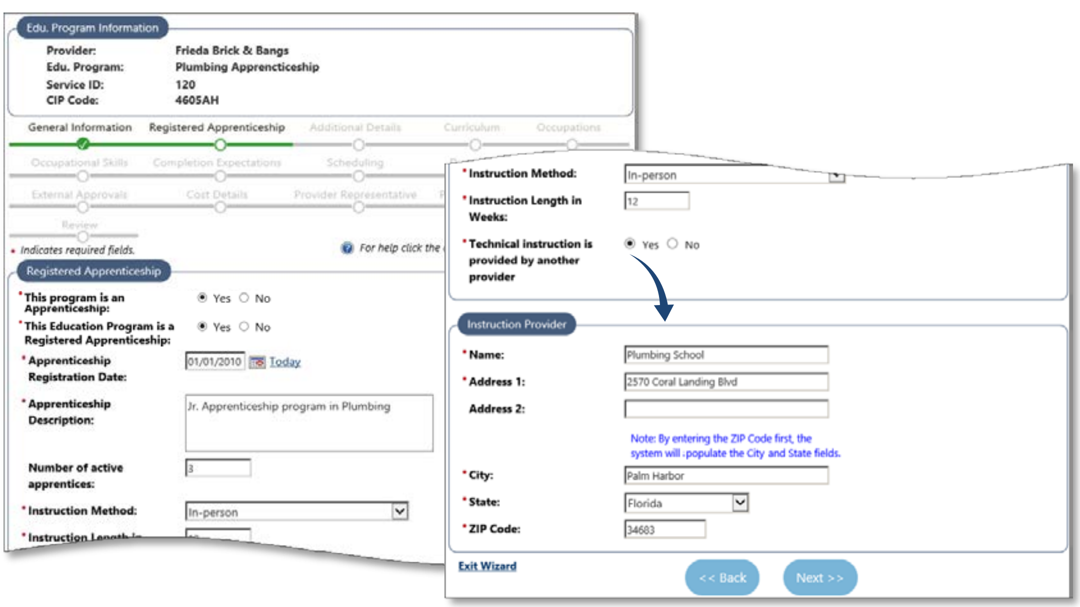
  If no, click the **Next>>** button.

  There is nothing else to do on this tab. The next tab will display – Additional Details.

- **If the program <u>is</u> 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)

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.

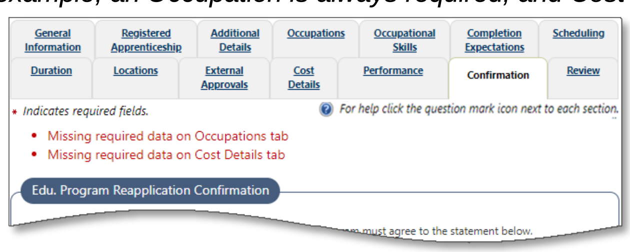
  Note: *If you enter zip code first, it will automatically populate the city and state.*

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 ⓘ, 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:*

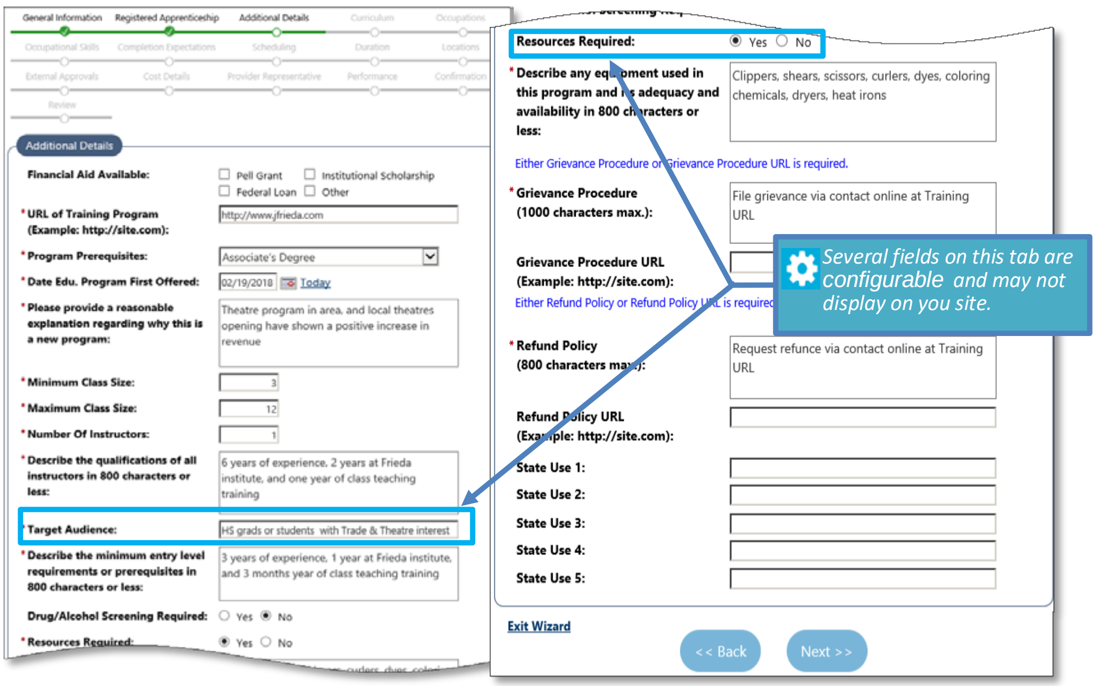
- *The check box for "*A certificate of completion of an apprenticeship.*"*
  This may apply for a Registered Apprenticeship program.
- *The question "*Is this education program in a partnership with business?*"*
  *If this apprenticeship is through a business, then the answer should be "*Yes,*" followed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

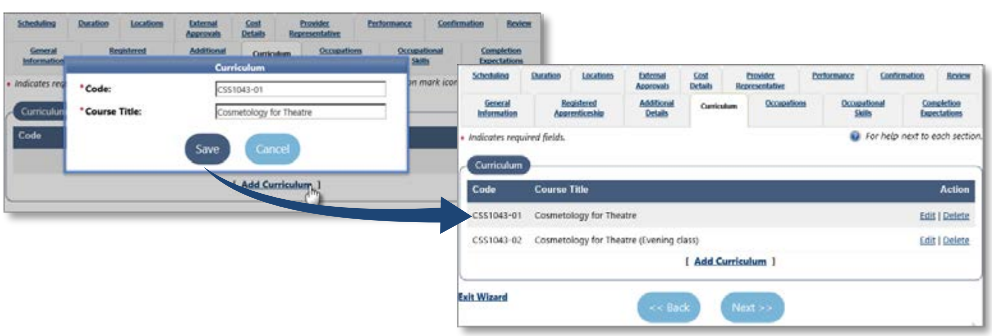
This tab may be configured to not display on the wizard, or to display with Curriculum not required, or to display with Curriculum as a required entry (that is necessary to complete the Confirmation and Review tabs).

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).

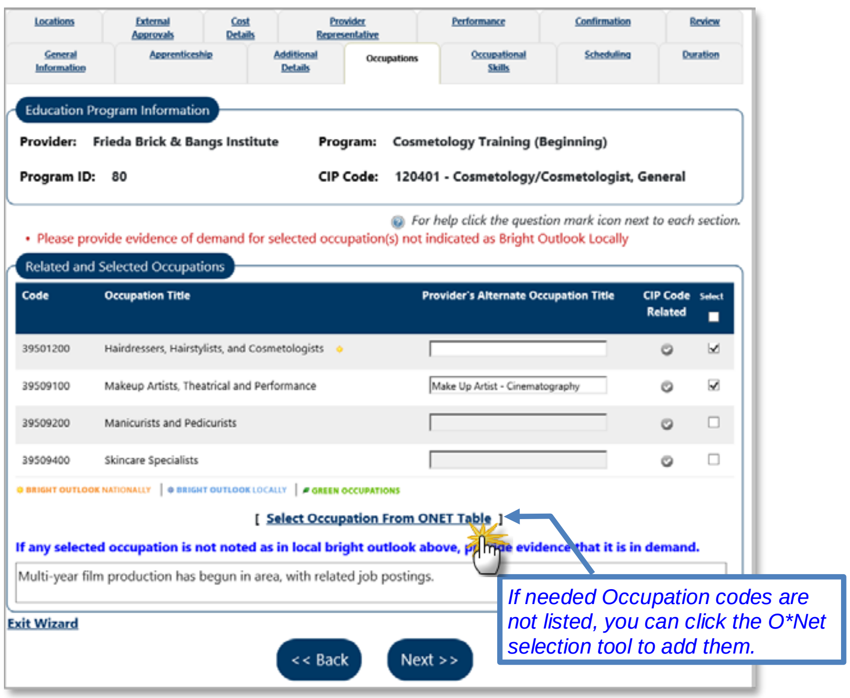
To select related occupations:

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.*

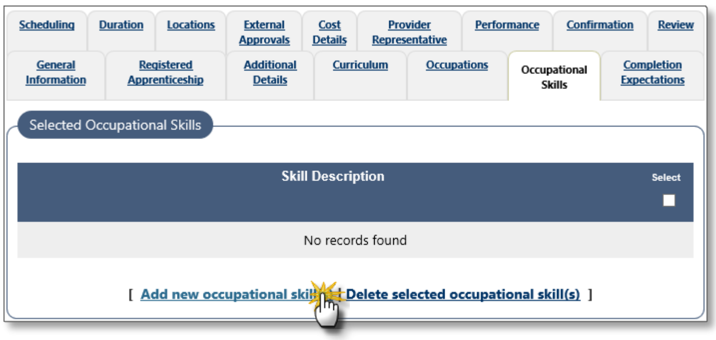
Search and Select Occupation Code *– The displayed list is from occupations, related by the CIP code in the General Info, tab, to this program. If other occupations apply, you can use the standard Occupation Search tool to select the Occupation (the link at the bottom of the list).*

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:

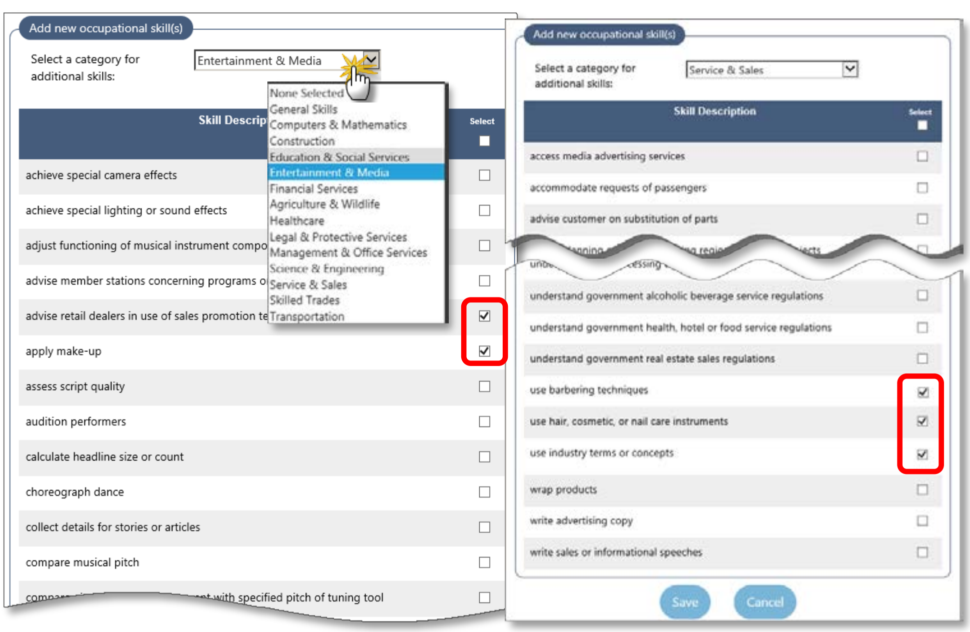
Click the Add new occupation program skills link.



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.

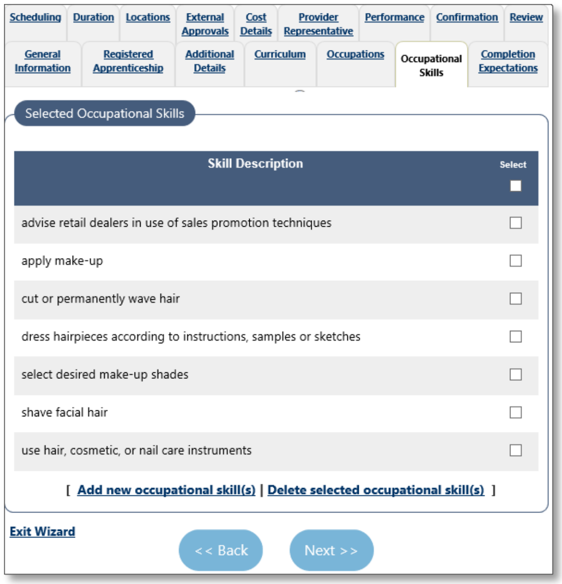
Note: *When you select other categories and check the appropriate boxes, the checked skills in each category stay in memory until you click* **Save** *or* **Cancel***.*



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.

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 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:

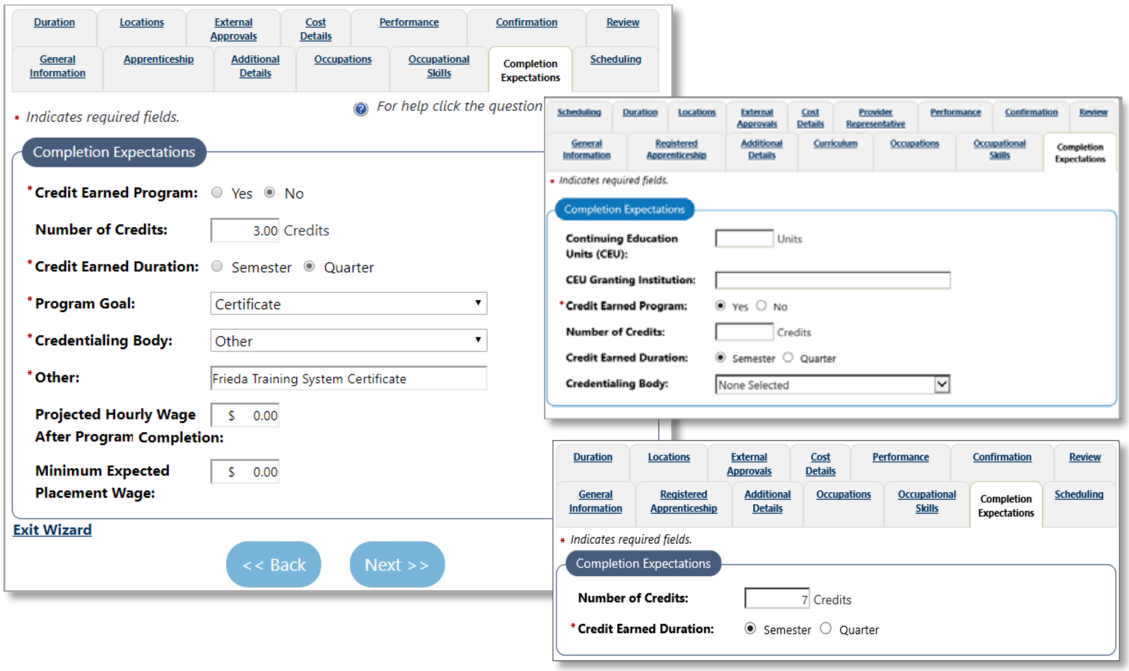
Enter the appropriate information for each displayed field:

- **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 drop-down.

  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:

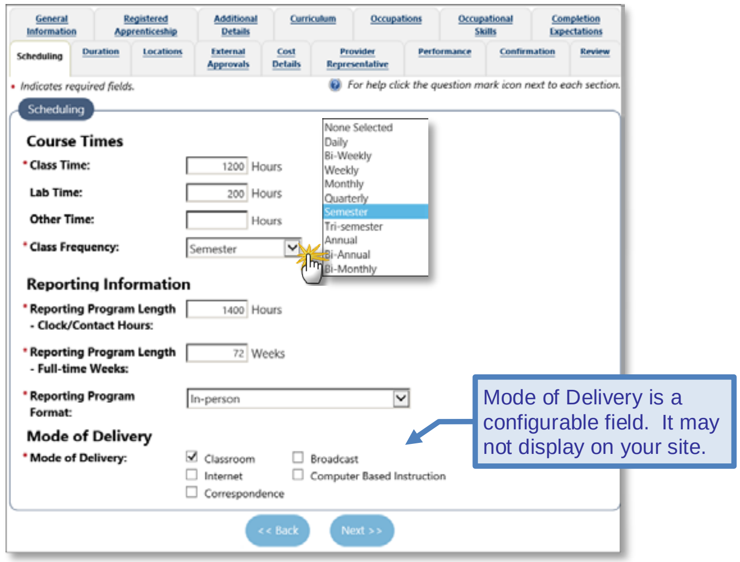
Enter the appropriate information for each displayed field:

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.

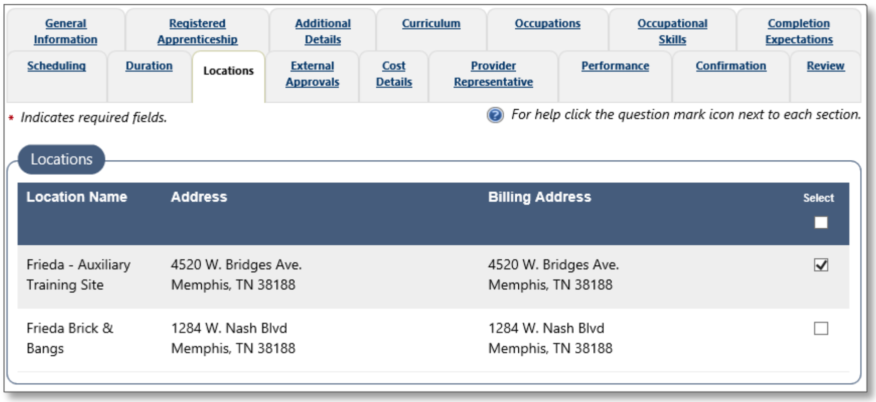
When all data is entered, click the **Next>>** button.

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.

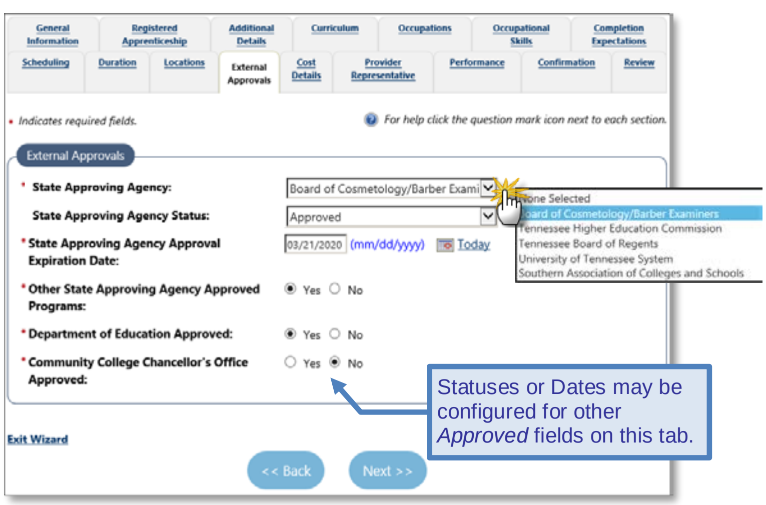
The External Approvals tab will display.

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 3-39, 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).

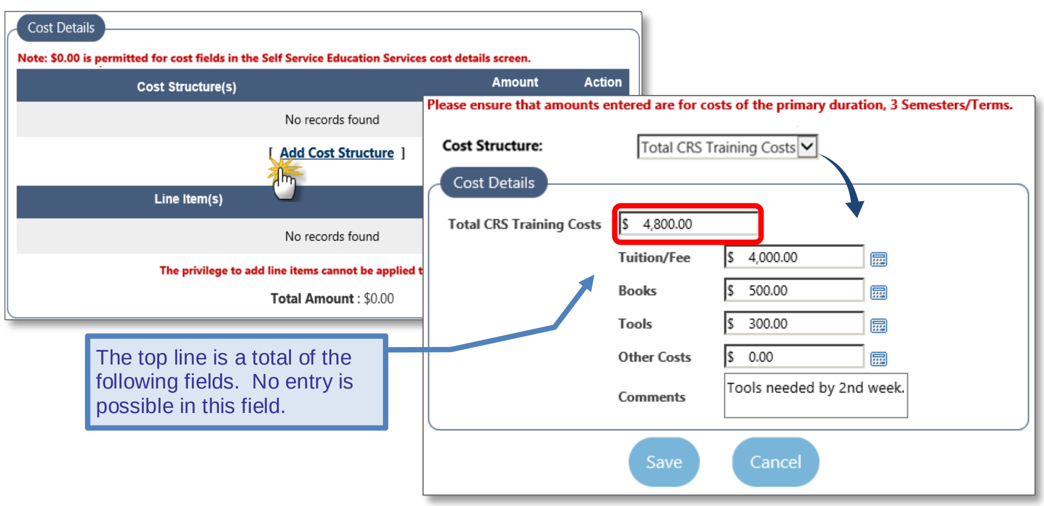
To add the cost details for the program:

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).

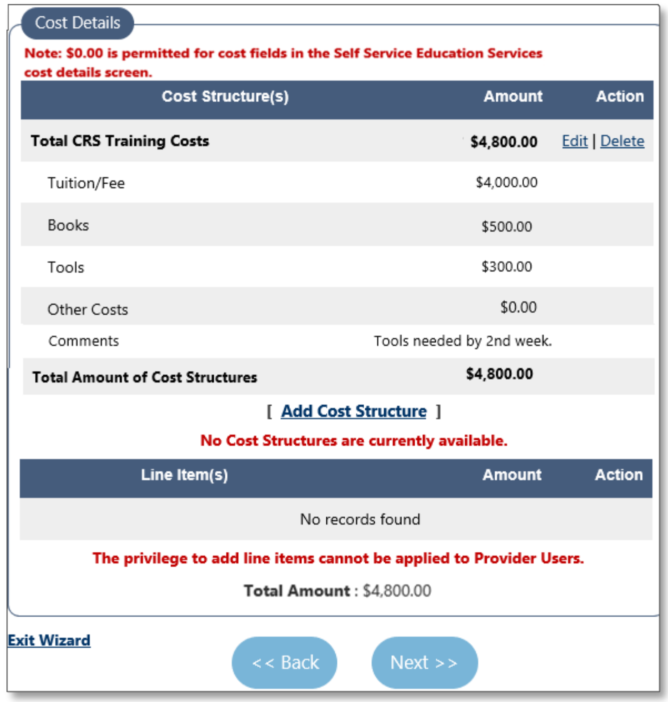
This displays fields in the Cost Details area (as shown below).



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 for 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).*

Cost Structure Selections: *There is 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.*

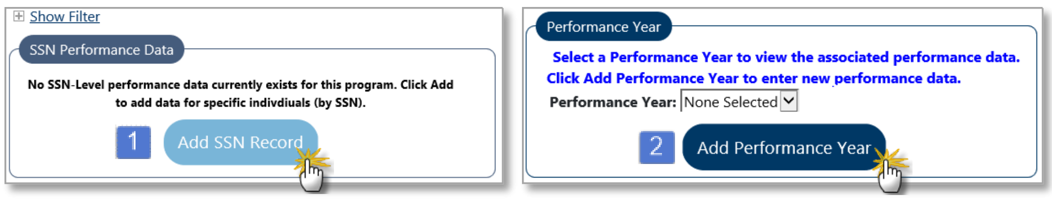
When all data is entered, click the **Next>>** button.

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.

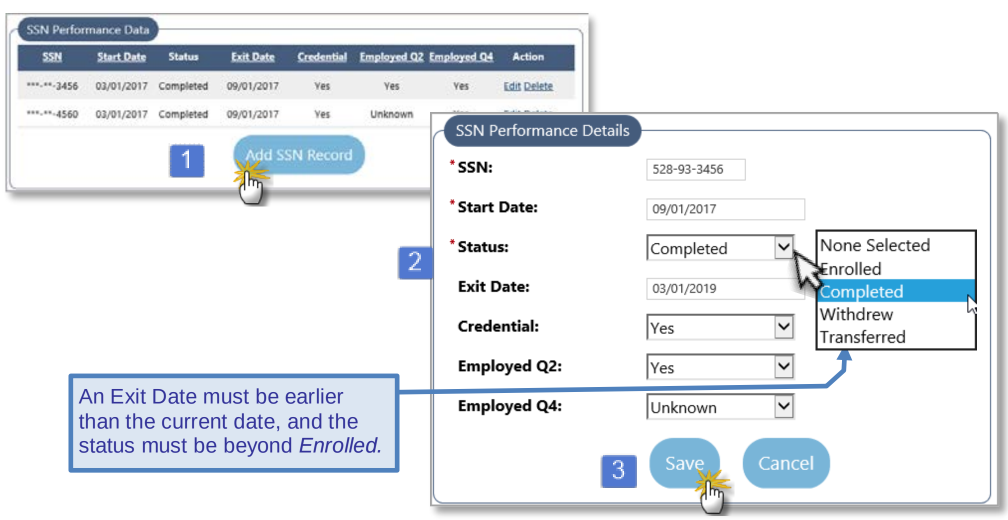
SSN Performance Data (Adding Data per Enrolled Individual)

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

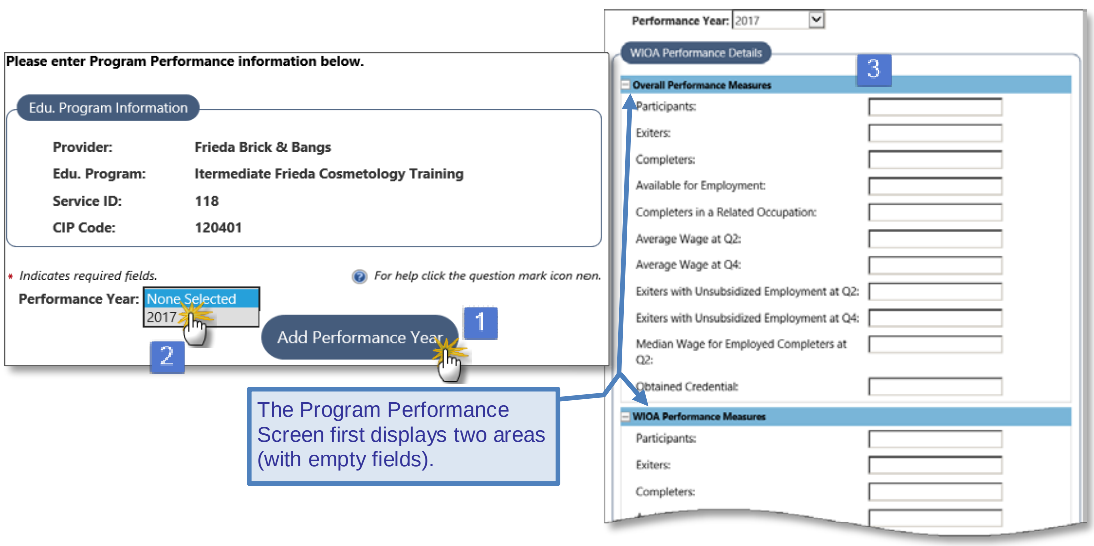
To add a performance year (and start entering details for the year):

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).



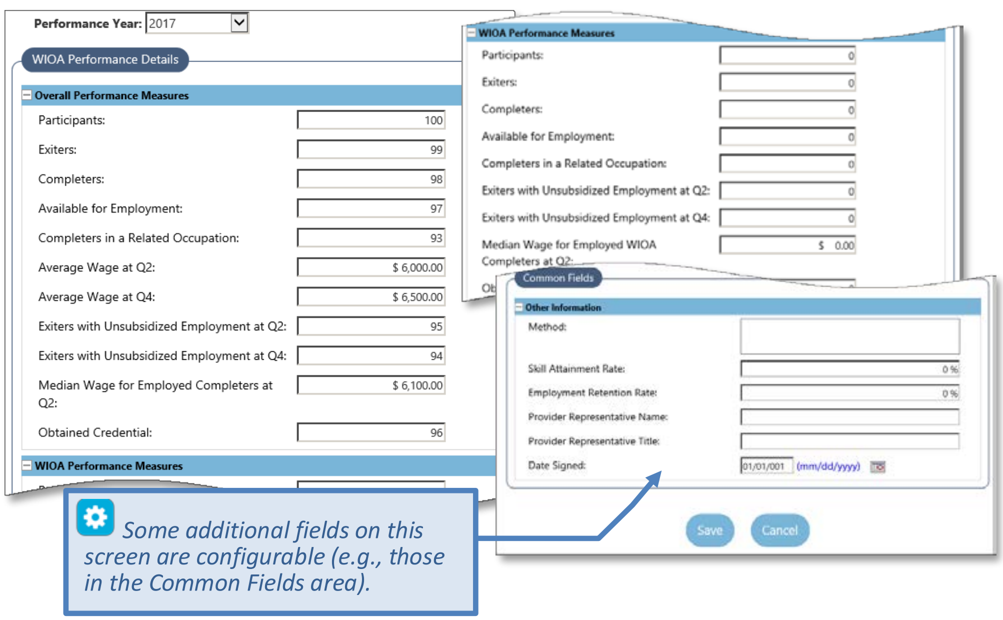
Opening a Program Performance Screen for Aggregate Data Entry for a Specific Year

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

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.*

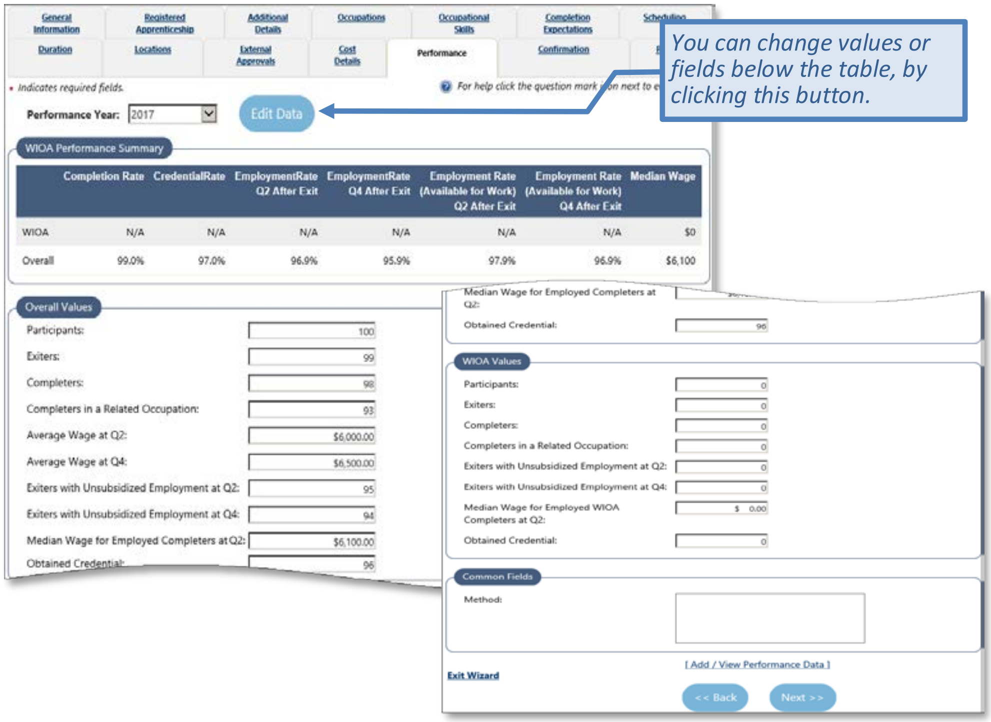
Keep in mind that performance data is not required but is critical to reliable WIOA *certification. It must be verified by staff to be accurate. Therefore, sites are often configured to limit the entry to staff, and only allow provider users the ability to view the completion, employment, and performance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

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.

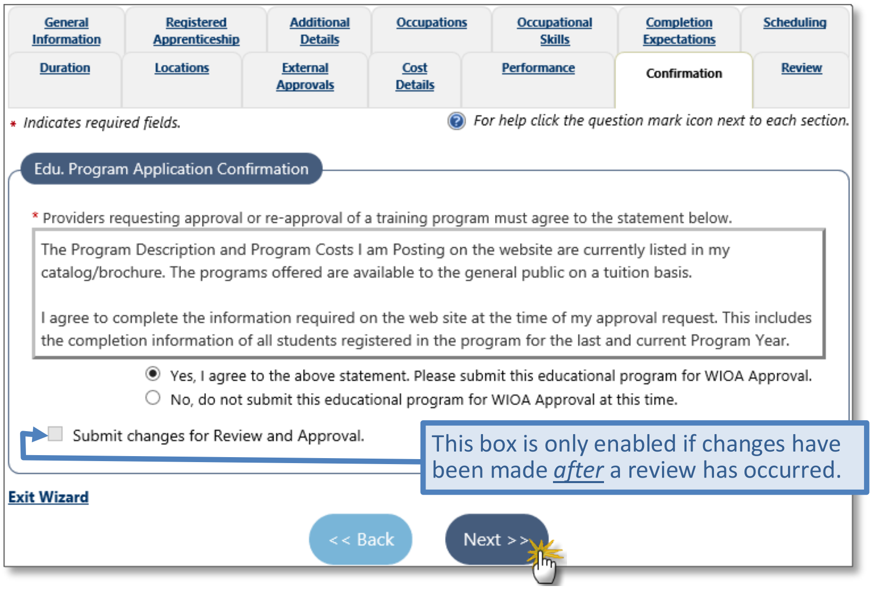
This section contains a simple confirmation statement that you must read before you submit the program for approval.

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).*

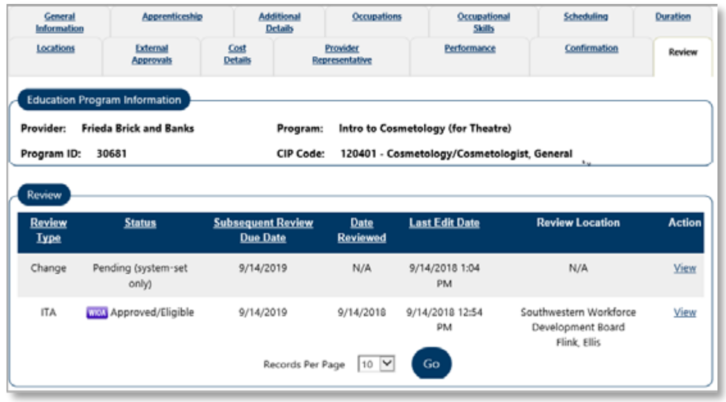
If Submit for ETPL Approval was not selected on the first, General Information tab, then the Confirmation and Yes/No *radio buttons will not display. There will only be a check box to Submit Education Program for Review and Approval.*

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).

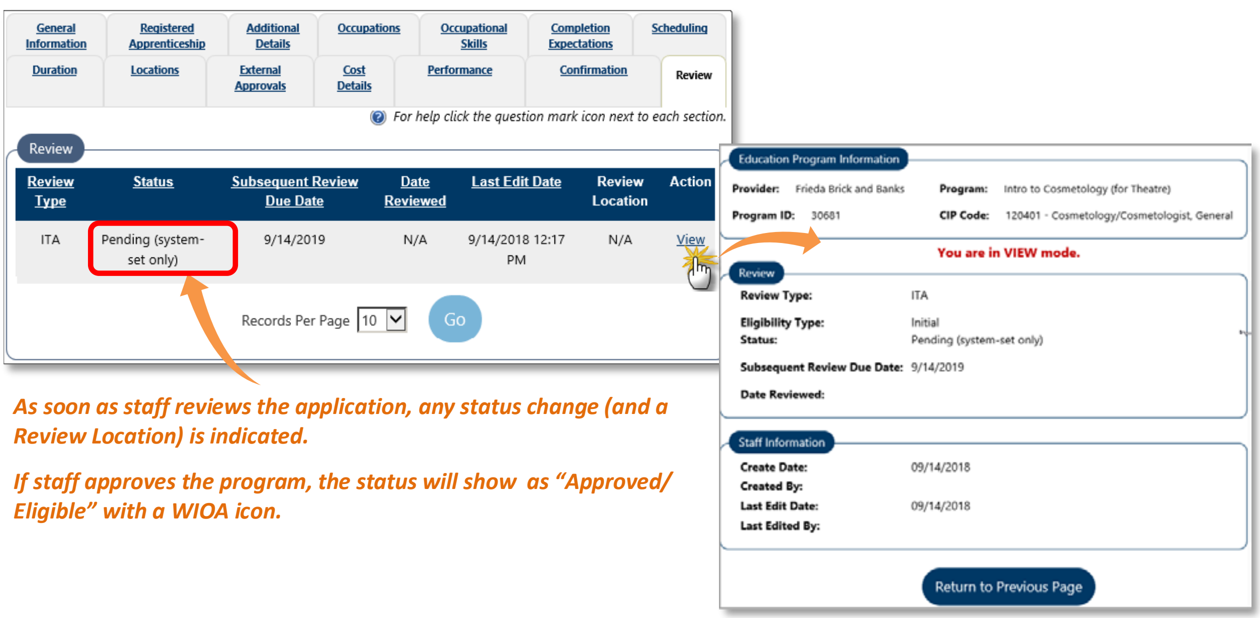
You can click a View link (for each review or change record) and see details on the review.



Review Tab (with Staff Approval & User Change

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

Click the View link in the Action column. A Review screen displays (in VIEW only mode). Review data on the screen.



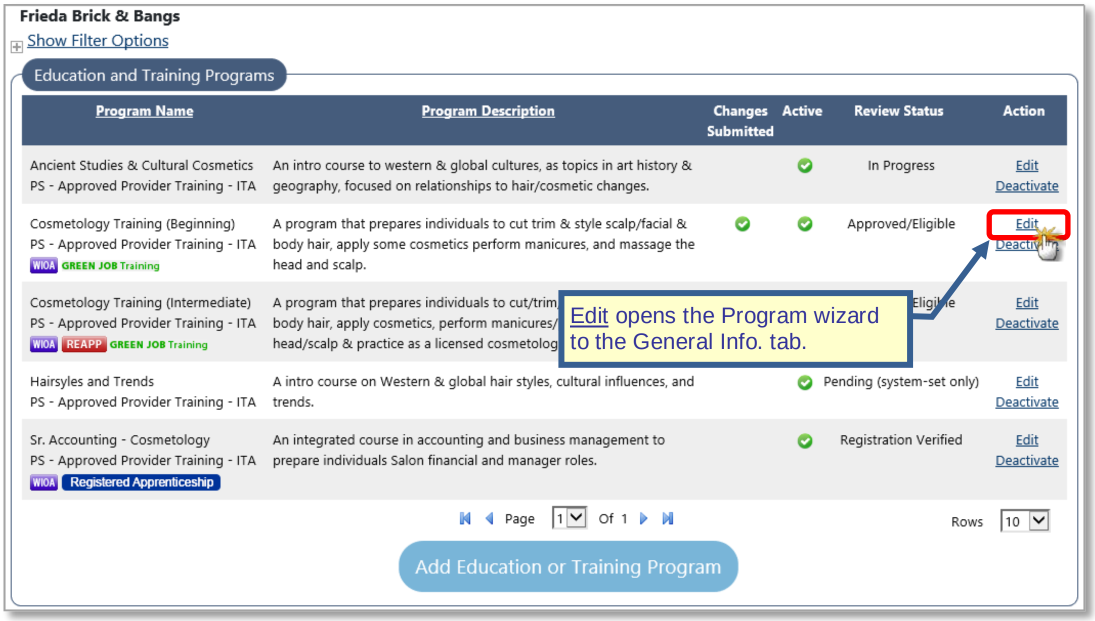
Review Tab (at end of initial Submission)

When done, click the **Review to Previous Page** button.

..

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

When you click the *Edit* 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 Edit 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.

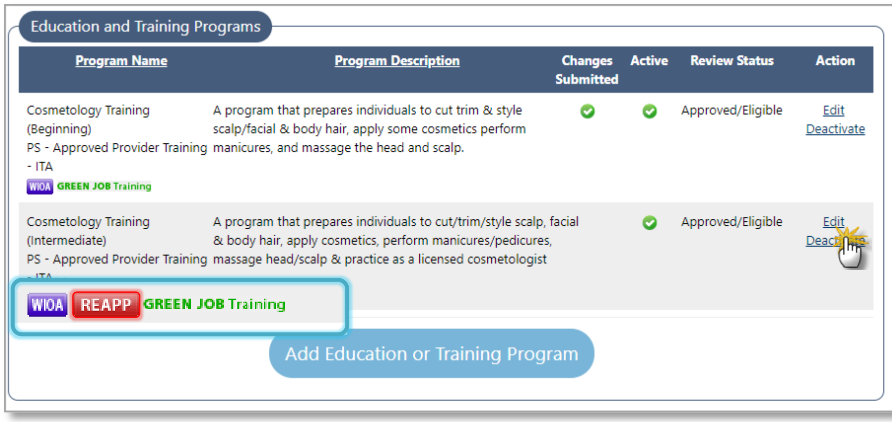
Note: *For more details on editing any specific section, see the previous topics for each tab related to Adding a program. You can see a brief description, and links to each tab and topic, from the Table* 3-1 Tabs of the E&T Program Wizard, *introduced on page 3-4.*

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 WI The Education and Training Programs List (to edit programs)

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).

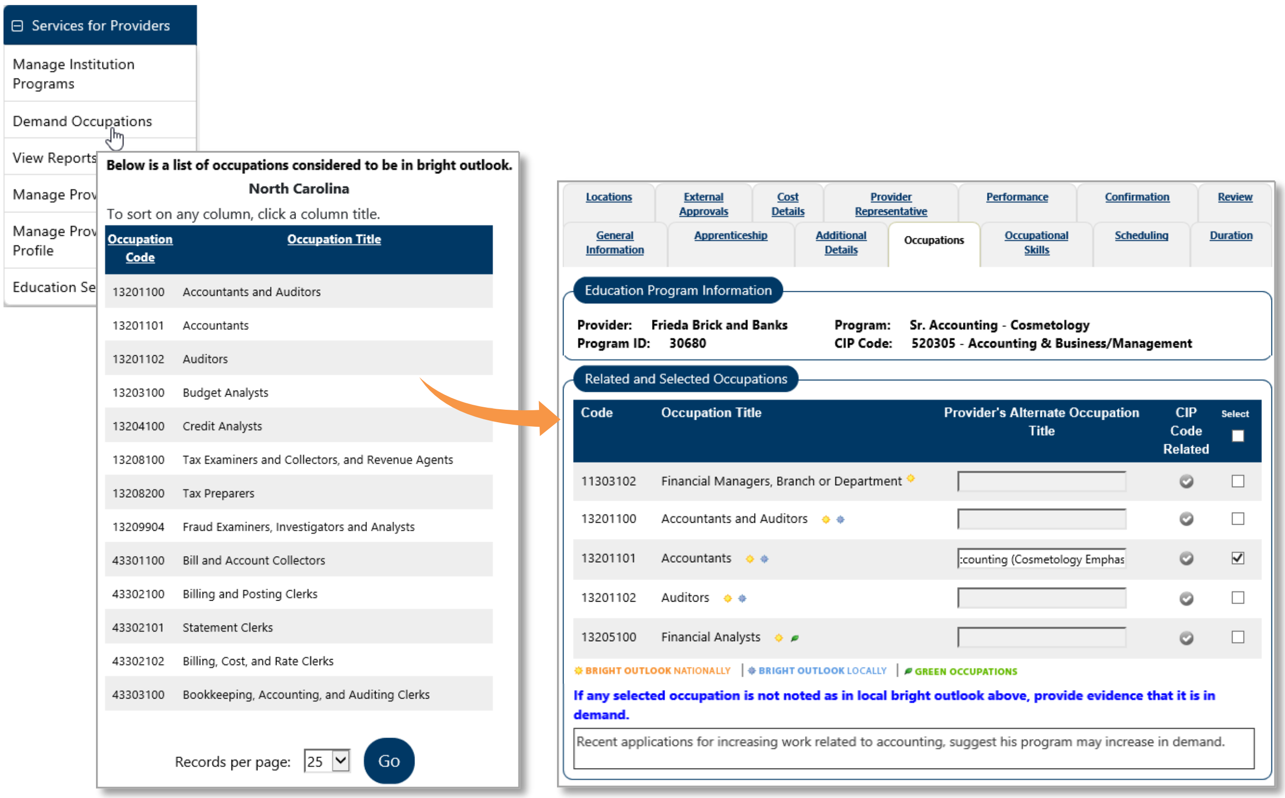
Click the Edit link from the action column.

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 Demand Occupations. 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 The Education and Training Programs List (to edit programs)

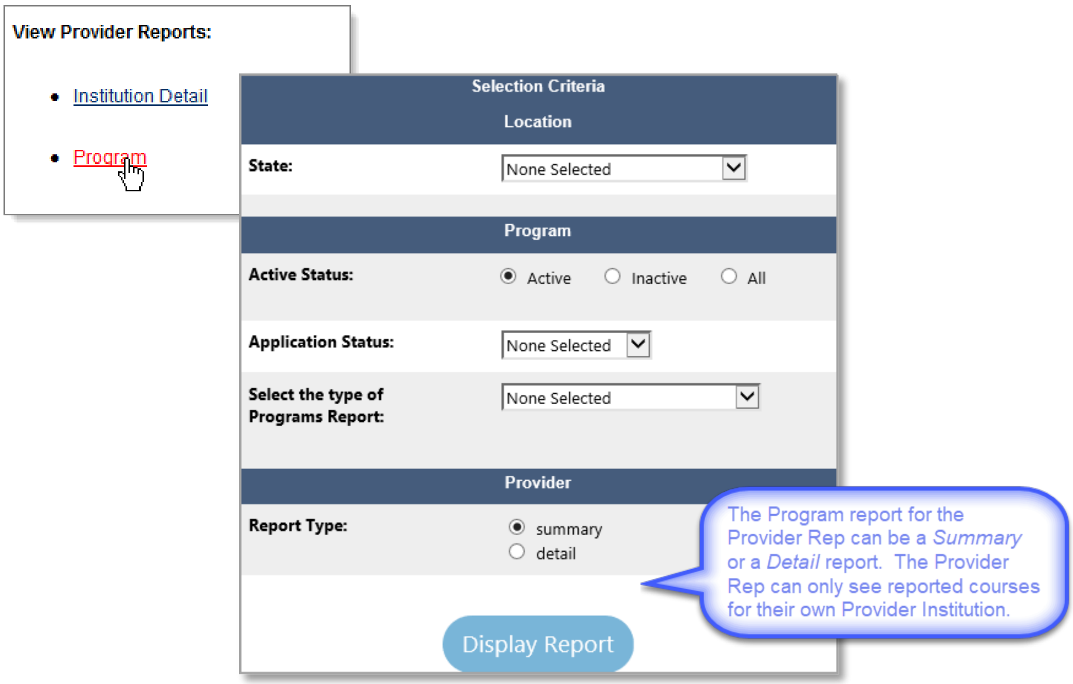
This information can be valuable to providers when they attempt to research and create courses and programs that have inherent benefits in the workplace. When occupations are selected as part of creating/adding a program, any selectable occupations that are also associated with a program's CIP code, 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: Institution Detail, Program (which enables selection criteria for both Program Summary and Program Detail types) as well as Program reports),

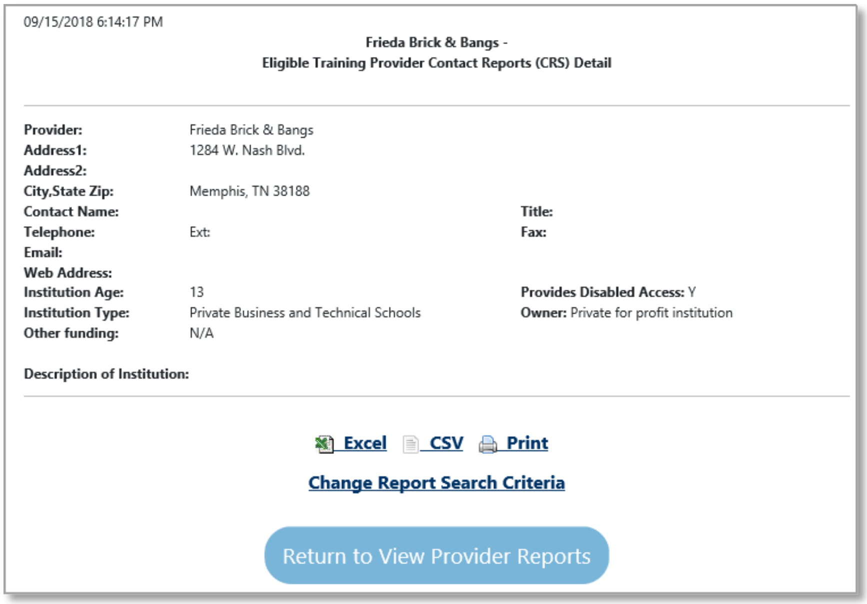
Click the View Reports link to begin selecting and generating the desired reports.



Provider Report, Program Selection

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.


09/15/2018 6:14:17 PM

Frieda Brick & Bangs -
Eligible Training Provider Contact Reports (CRS) Detail

Provider: Frieda Brick & Bangs
Address1: 1284 W. Nash Blvd.
Address2:
City,State Zip: Memphis, TN 38188
Contact Name: **Title:**
Telephone: Ext: **Fax:**
Email:
Web Address:
Institution Age: 13 **Provides Disabled Access:** Y
Institution Type: Private Business and Technical Schools **Owner:** Private for profit institution
Other funding: N/A

Description of Institution:

Excel CSV Print

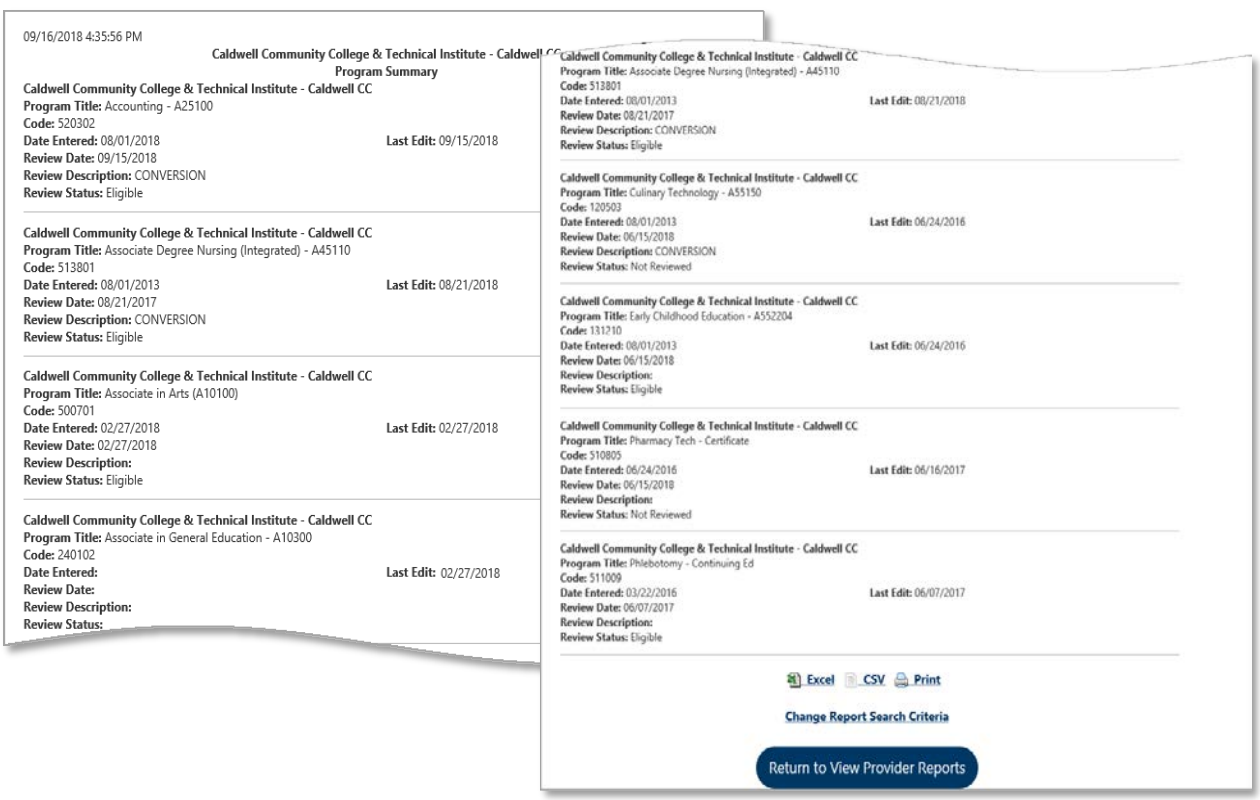
Change Report Search Criteria

Return to View Provider Reports

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.


09/16/2018 4:35:56 PM

Caldwell Community College & Technical Institute - Caldwell CC
Program Summary

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Accounting - A25100
Code: 520302
Date Entered: 08/01/2018 **Last Edit:** 09/15/2018
Review Date: 09/15/2018
Review Description: CONVERSION
Review Status: Eligible

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Associate Degree Nursing (Integrated) - A45110
Code: 513801
Date Entered: 08/01/2013 **Last Edit:** 08/21/2018
Review Date: 08/21/2017
Review Description: CONVERSION
Review Status: Eligible

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Associate in Arts (A10100)
Code: 500701
Date Entered: 02/27/2018 **Last Edit:** 02/27/2018
Review Date: 02/27/2018
Review Description:
Review Status: Eligible

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Associate in General Education - A10300
Code: 240102
Date Entered: **Last Edit:** 02/27/2018
Review Date:
Review Description:
Review Status:

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Associate Degree Nursing (Integrated) - A45110
Code: 513801
Date Entered: 08/01/2013 **Last Edit:** 08/21/2018
Review Date: 08/21/2017
Review Description: CONVERSION
Review Status: Eligible

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Culinary Technology - A55150
Code: 120503
Date Entered: 08/01/2013 **Last Edit:** 06/24/2016
Review Date: 06/15/2018
Review Description: CONVERSION
Review Status: Not Reviewed

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Early Childhood Education - A552204
Code: 131210
Date Entered: 08/01/2013 **Last Edit:** 06/24/2016
Review Date: 06/15/2018
Review Description:
Review Status: Eligible

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Pharmacy Tech - Certificate
Code: 510805
Date Entered: 06/24/2016 **Last Edit:** 06/16/2017
Review Date: 06/15/2018
Review Description:
Review Status: Not Reviewed

Caldwell Community College & Technical Institute - Caldwell CC
Program Title: Phlebotomy - Continuing Ed
Code: 511009
Date Entered: 03/22/2016 **Last Edit:** 06/07/2017
Review Date: 06/07/2017
Review Description:
Review Status: Eligible

Excel CSV Print

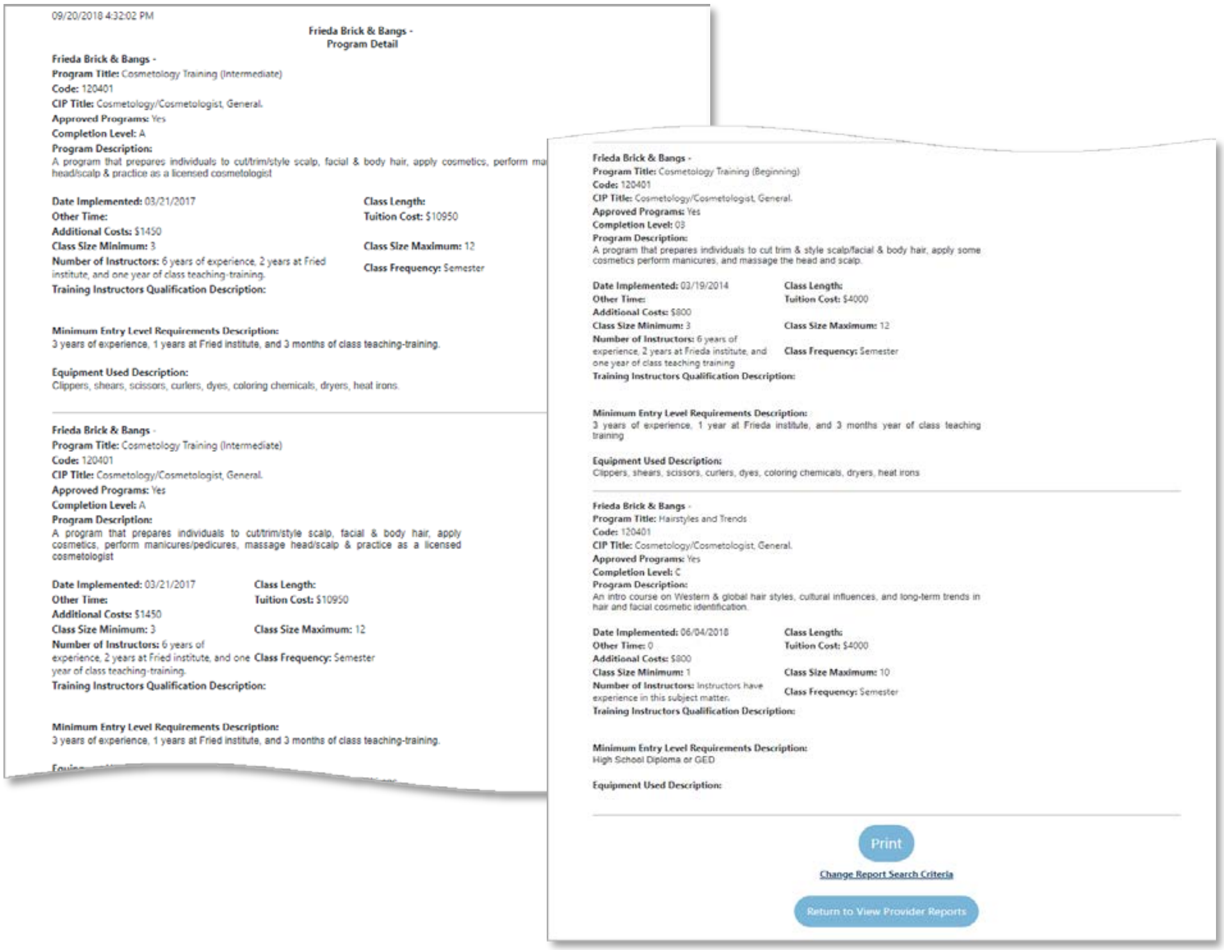
Change Report Search Criteria

Return to View Provider Reports

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.


09/20/2018 4:32:02 PM

Frieda Brick & Bangs -
Program Detail

Frieda Brick & Bangs -
Program Title: Cosmetology Training (Intermediate)
Code: 120401
CIP Title: Cosmetology/Cosmetologist, General.
Approved Programs: Yes
Completion Level: A
Program Description:
A program that prepares individuals to cut/trim/style scalp, facial & body hair, apply cosmetics, perform ma
head/scalp & practice as a licensed cosmetologist

Date Implemented: 03/21/2017
Class Length:
Other Time:
Tuition Cost: $10950
Additional Costs: $1450
Class Size Minimum: 3
Class Size Maximum: 12
Number of Instructors: 6 years of experience, 2 years at Fried institute, and one year of class teaching-training.
Class Frequency: Semester
Training Instructors Qualification Description:

Minimum Entry Level Requirements Description:
3 years of experience, 1 years at Fried institute, and 3 months of class teaching-training.

Equipment Used Description:
Clippers, shears, scissors, curlers, dyes, coloring chemicals, dryers, heat irons.

Frieda Brick & Bangs -
Program Title: Cosmetology Training (Intermediate)
Code: 120401
CIP Title: Cosmetology/Cosmetologist, General.
Approved Programs: Yes
Completion Level: A
Program Description:
A program that prepares individuals to cut/trim/style scalp, facial & body hair, apply cosmetics, perform manicures/pedicures, massage head/scalp & practice as a licensed cosmetologist

Date Implemented: 03/21/2017
Class Length:
Other Time:
Tuition Cost: $10950
Additional Costs: $1450
Class Size Minimum: 3
Class Size Maximum: 12
Number of Instructors: 6 years of experience, 2 years at Fried institute, and one year of class teaching-training.
Class Frequency: Semester
Training Instructors Qualification Description:

Minimum Entry Level Requirements Description:
3 years of experience, 1 years at Fried institute, and 3 months of class teaching-training.

Frieda Brick & Bangs -
Program Title: Cosmetology Training (Beginning)
Code: 120401
CIP Title: Cosmetology/Cosmetologist, General.
Approved Programs: Yes
Completion Level: 03
Program Description:
A program that prepares individuals to cut trim & style scalp/facial & body hair, apply some cosmetics perform manicures, and massage the head and scalp.

Date Implemented: 03/19/2014
Class Length:
Other Time:
Tuition Cost: $4000
Additional Costs: $800
Class Size Minimum: 3
Class Size Maximum: 12
Number of Instructors: 6 years of experience, 2 years at Frieda institute, and one year of class teaching training
Class Frequency: Semester
Training Instructors Qualification Description:

Minimum Entry Level Requirements Description:
3 years of experience, 1 year at Frieda institute, and 3 months year of class teaching training

Equipment Used Description:
Clippers, shears, scissors, curlers, dyes, coloring chemicals, dryers, heat irons

Frieda Brick & Bangs -
Program Title: Hairstyles and Trends
Code: 120401
CIP Title: Cosmetology/Cosmetologist, General.
Approved Programs: Yes
Completion Level: C
Program Description:
An intro course on Western & global hair styles, cultural influences, and long-term trends in hair and facial cosmetic identification.

Date Implemented: 06/04/2018
Class Length:
Other Time: 0
Tuition Cost: $4000
Additional Costs: $800
Class Size Minimum: 1
Class Size Maximum: 10
Number of Instructors: Instructors have experience in this subject matter.
Class Frequency: Semester
Training Instructors Qualification Description:

Minimum Entry Level Requirements Description:
High School Diploma or GED

Equipment Used Description:

Print

Change Report Search Criteria

Return to View Provider Reports

Program Detail Report

Manage Provider Profile

The **Manage Provider Profile** menu option lets a provider user review and change some of the basic details 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). These display on the General Tab. The provider user can also change information on other tabs of the Provider Profile, such as provider locations, provider contacts, and documents a provider user can attach (for staff concerns/review).

Menu Selection to Manage Provider Profile

General Tab Information

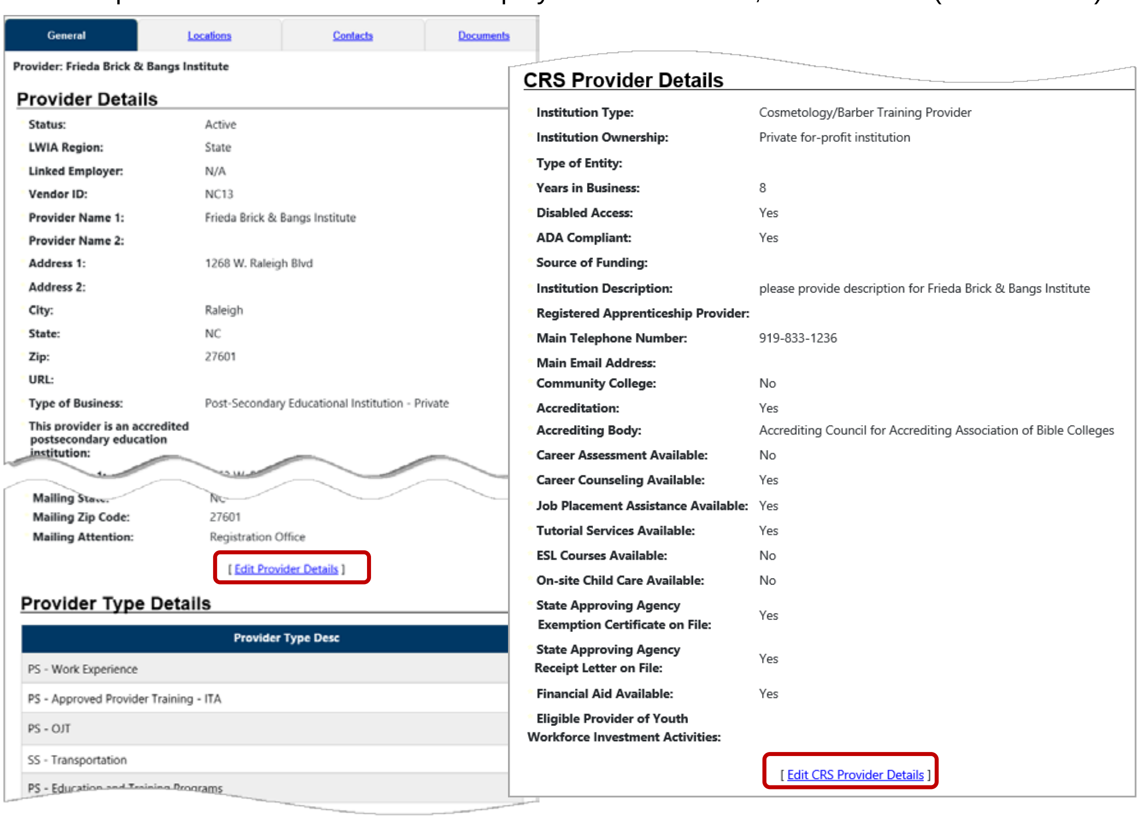
General data and CRS data are displayed in two sections on the top and bottom of the General tab (this tab displays as the first tab of the Provider Profile). Each section has a Details link below it, to access the section an edit data. Provider users can select fields, and delete or edit the entries.

Note: *The tab also includes a middle section, Provider Type Details, that defines types of programs and services the provider can be associated with. Only staff can set/change the Provider Types).*

To Manage Provider Institution Details:

1. Select **Manage Providers ▸ Manage a Provider Profile** (from the left navigation menu).

   This opens the Provider Profile and displays the General tab, in view mode (shown below).



Provider Institution's Profile (View Mode on General Tab)

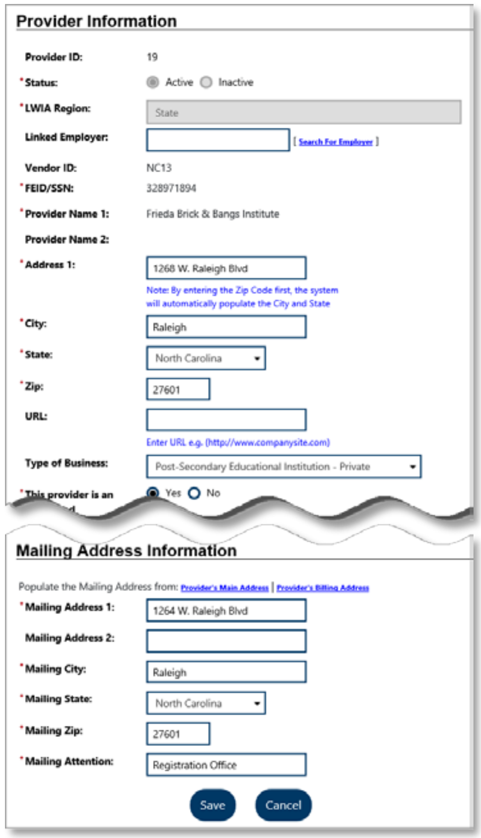
2 Click the Edit Profile Details link at the bottom of the Provider Details section.

This opens the provider record in editing mode, for the Provider Information, Billing Address, and Mailing Address sections (as shown below).

3 Make any necessary edit for the displayed information.

4 Click the **Save** button (at the bottom of the screen).

The data is saved and the *General* tab of Provider Profile is redisplayed.



Provider Information (Edit Mode)

Note: *Some fields, such as Vendor ID, or FEID, are not editable for managing after provider registration. Other fields, such as Active/Inactive, and LWIA Region (at top of screen) are only editable by staff.*

▶ To Manage Provider CRS Data:

1 Select **Manage Providers ▸ Manage a Provider Profile** (from the left navigation menu).

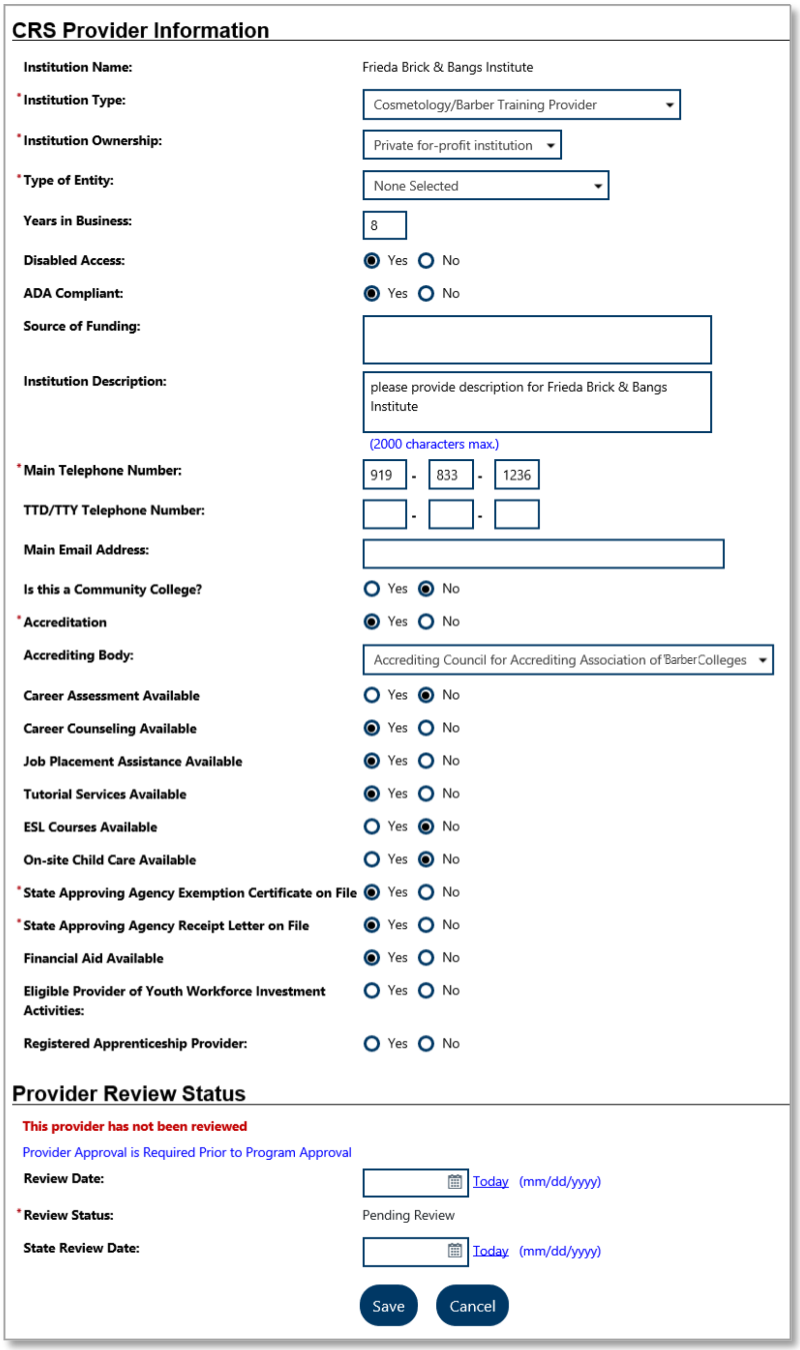
This opens the Provider Profile and displays the General tab, in view mode (shown on previous page).

2 Click the Edit CRS Provider Details link at the bottom of the Provider Details section.

This opens the Consumer Reporting System (CRS) provider record in editing mode, and displays various provider fields related to CRS data.

CRS data is data which individuals or employer may be able to view via their Education options.

Note: *CRS data is data that individuals or employers may be able to view via their Education options.*



CRS Provider Information (Edit Mode)

3 Make all necessary edits/changes for the fields in the information in the CRS Provider Information area.

4 Click the **Save** button (at the bottom of the screen).

The data is saved and the **General** tab of Provider Profile is redisplayed.

Note: *If you see a **Provider Review Status** section, at the bottom of the screen (as shown above), this indicates that staff has both activated the provider institution, and associated a provider type (under Provider Type Details) which requires this review status. For example, a provider type "*PS- Approved Provider Training – ITA*" will display this area. You will need to enter the Review*

Date and Review Status before you can enter programs for your provider and have the programs approved. However, the approval of these entries is not required to save the data in the CRS Provider Information area, until after programs are entered.

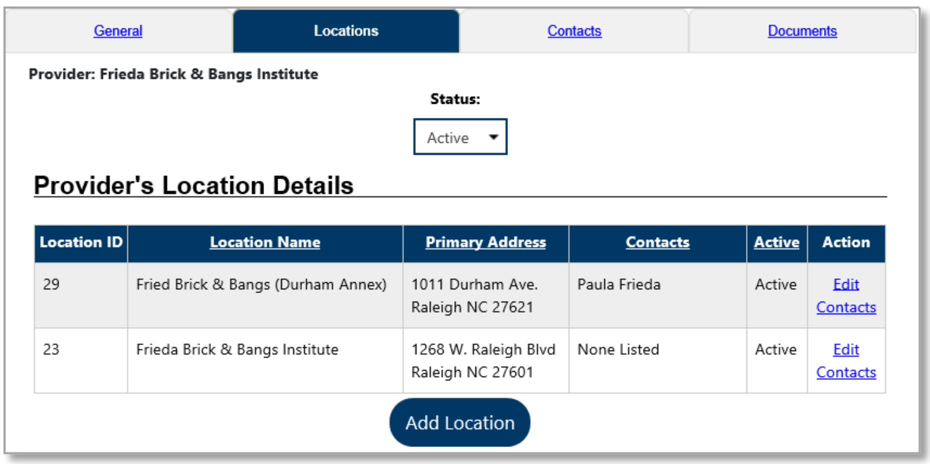
Provider Locations

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.

You can add locations, edit them, or add existing contacts to locations, depending on your privileges as a Provider Users. 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, see the topic "Adding an Provider Location" on the next page.



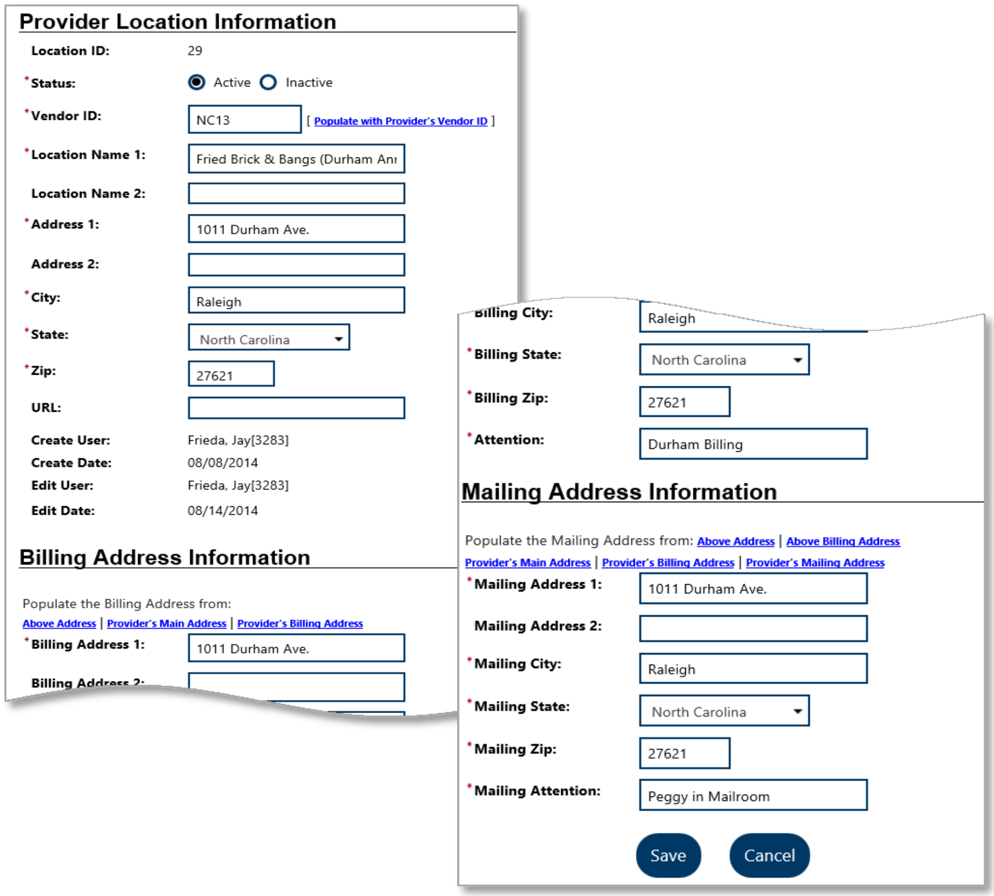
Locations Tab

Click the <u>Edit</u> link (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 Provider Location Screen

Note: *By deactivating a location, you also deactivate contacts associated with that site. When/if you re-activate 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 screen displays the same three sections as shown above for editing an existing location, except that all fields are initially blank.

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.*

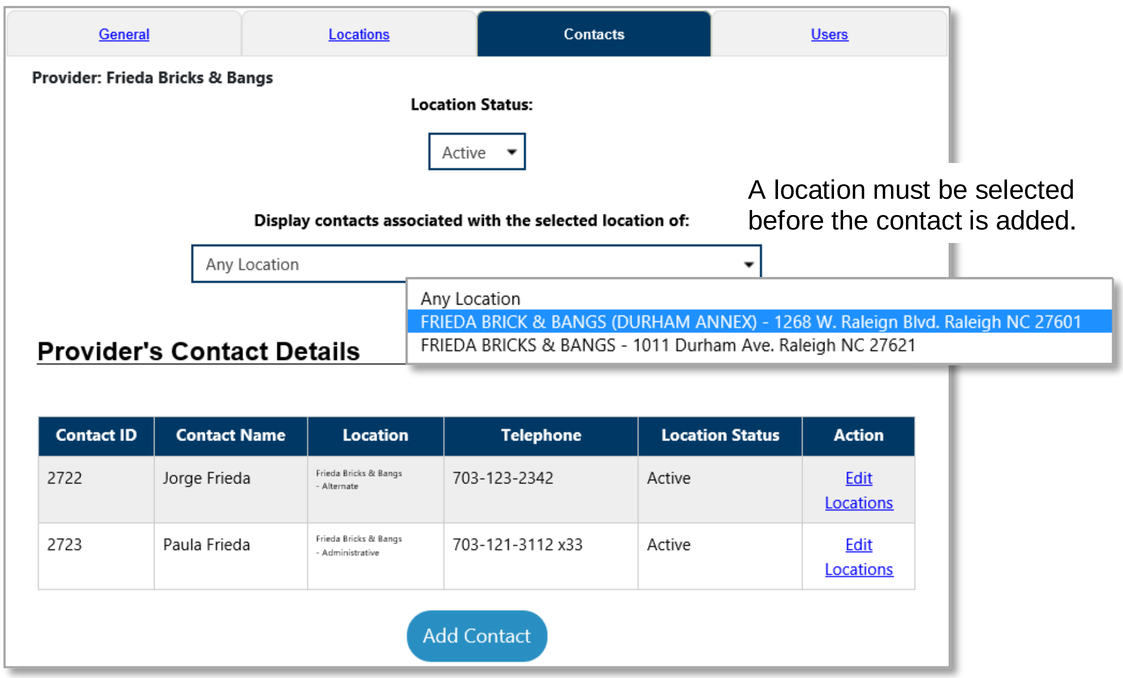
You must specify a billing and mailing address for the site, but you can use links to copy these form an address already entered. However, you must enter an "Attention" title manually in each.

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:

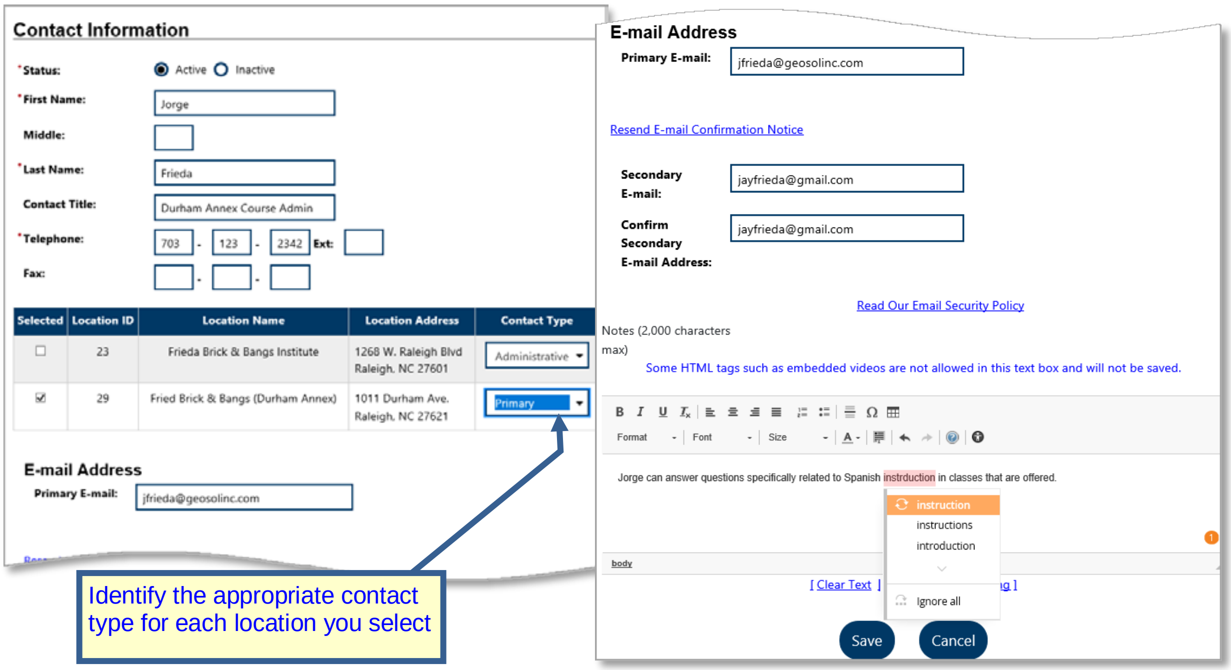
Display contacts associate with Active, or Inactive locations.
Display contacts associated with all locations or with a specific location (either *active* or *inactive*).
Click the **Add Contact** button to display the Provider Contact form and enter required and optional contact data. For details, see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

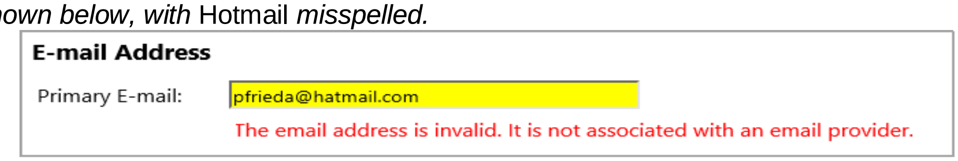


Edit Contact and Change Contact Type Screen

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 re-activate this contact person at any time simply by clicking the* ***Active*** *button and clicking* ***Save****.*

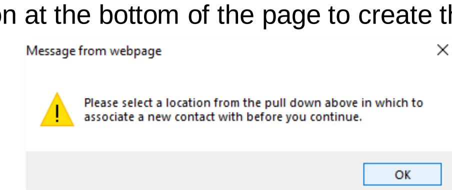
The email address includes an email confirmation link. Click the link to confirm that the email exists and was typed into the fields correctly. If the email provider is misspelled it may appear as shown below, with Hotmail *misspelled.*



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.

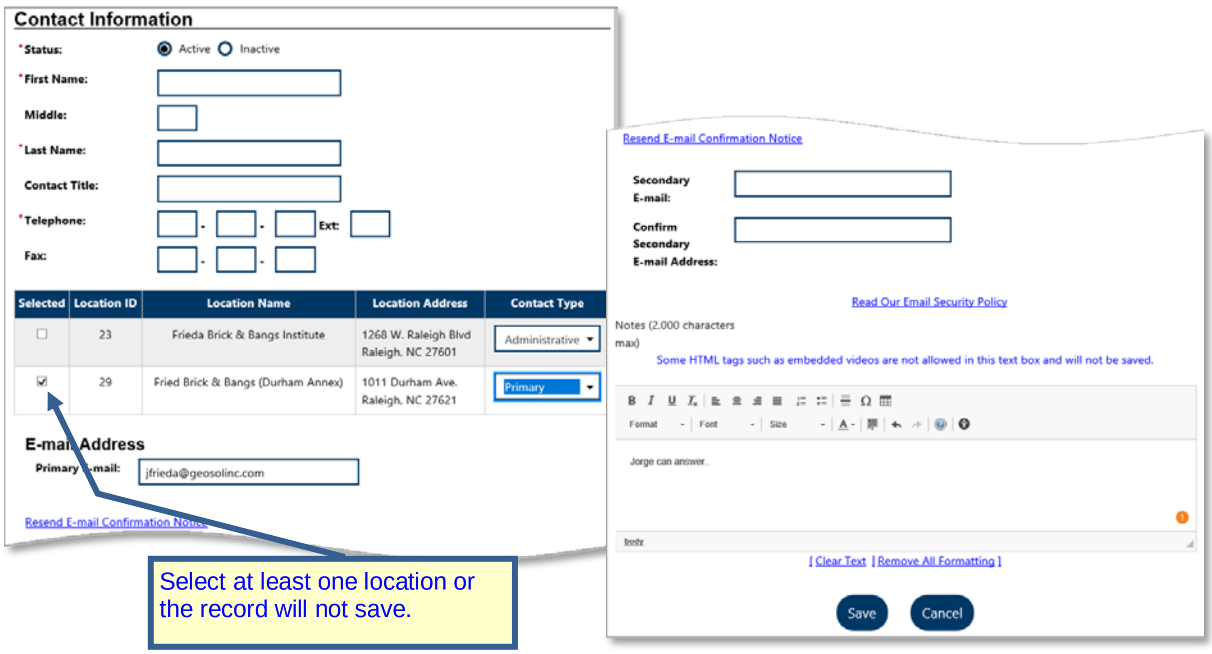


If a location is not selected when you click the **Add Contact** button, a pop-up will display.

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 **Manage Provider User Profile** menu option lets provider users review and edit their own contact information as well as the login security for accessing the system.

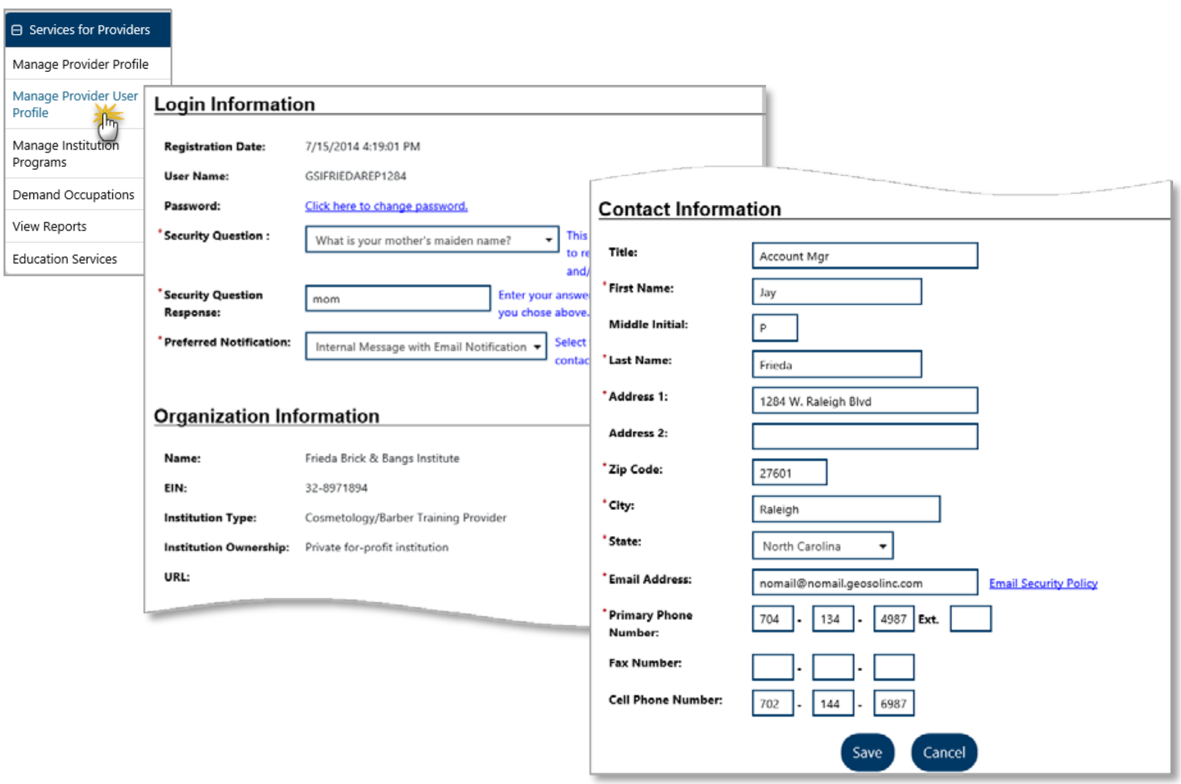
This information is presented in a screen with four sections. Provider reps can only make changes on this screen through two of the areas (as indicated below):

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.

The link to change the password opens a separate dialog box. It will require their current password, and new password entered and confirmed. Blue text will indicate requirements.

Organization Information: This section is only for informational purposes. Once a provider institution is created and activated, any items in this area that need to be changed must be changed by an appropriate staff member.

Contact Information: The provider user can change any of their basic contact information from this area, including name address and phone information. However, they must use the **Manager Provider Profile** option, if they want to make changes that are associated with their Provider Institution. For example, to change the provider location with which they are associated as a contact, they must change this using the Location tab of the Provider Profile (as described within the previous topic, Manage Provider Profile starting on page 3-35.



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.

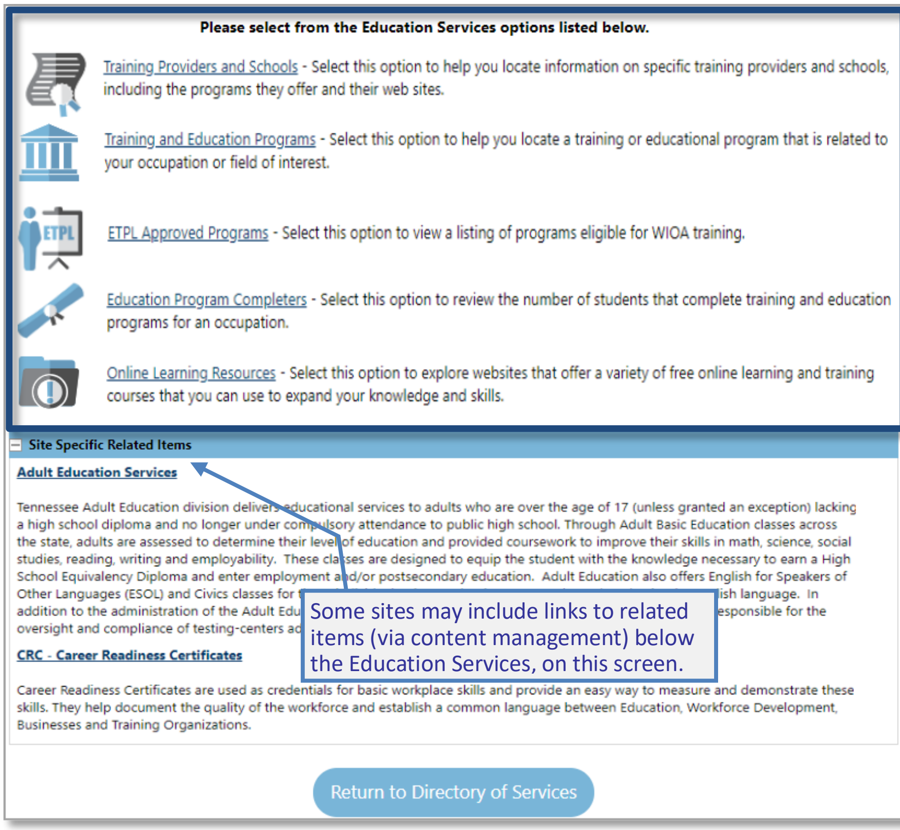
For example, provider users can research the different schools; they can compare a program or course of study offered by different schools in the same area, look at any available information about job placement of graduates, etc.

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:

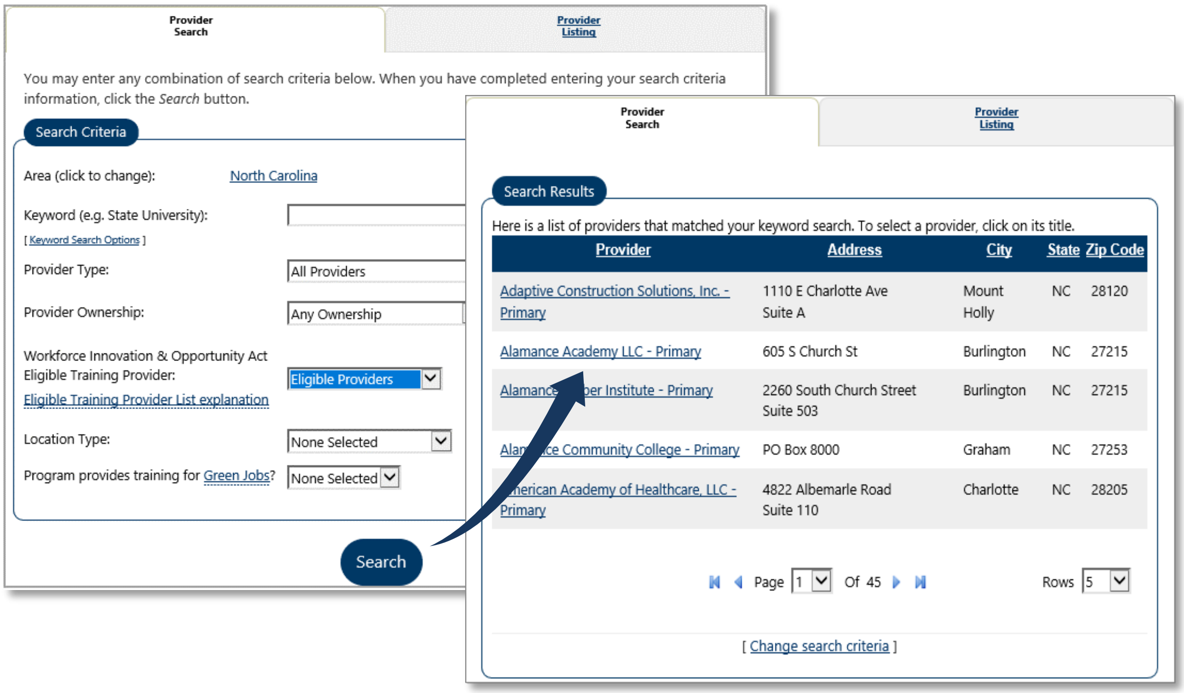
- **Training Providers and Schools** – lets you search for information about specific training providers.
- **Training and Education Programs** – lets you search for training or educational programs that meet your requirements.
- **Education Program Completers** – lets you view the number of participants 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.

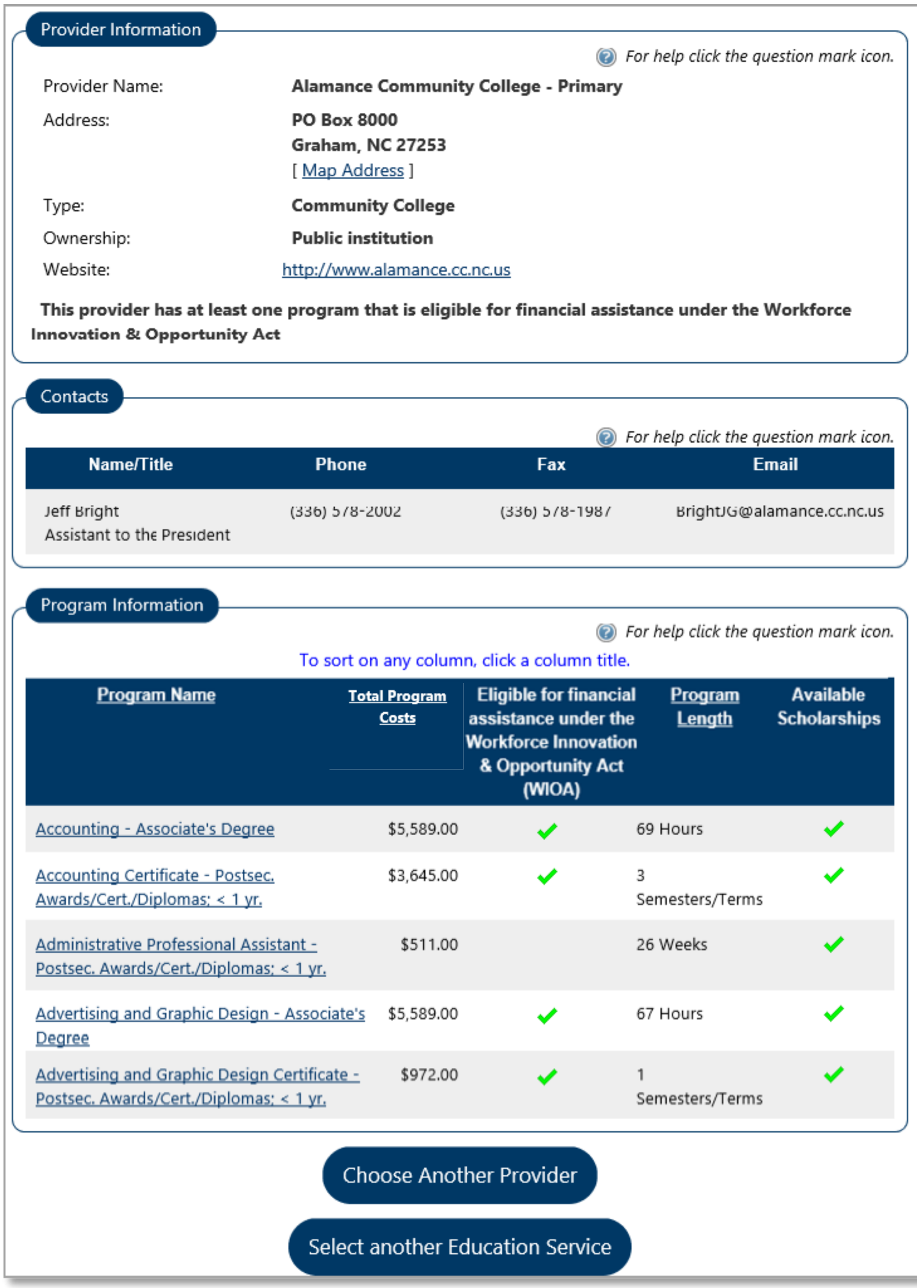


Search Screen for Training and Education Providers (and Search Results)

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.



Provider Information

For help click the question mark icon.

Provider Name:	**Alamance Community College - Primary**
Address:	**PO Box 8000** **Graham, NC 27253** [Map Address]
Type:	**Community College**
Ownership:	**Public institution**
Website:	http://www.alamance.cc.nc.us

This provider has at least one program that is eligible for financial assistance under the Workforce Innovation & Opportunity Act

Contacts

For help click the question mark icon.

Name/Title	Phone	Fax	Email
Jeff Bright Assistant to the President	(336) 578-2002	(336) 578-1987	BrightJG@alamance.cc.nc.us

Program Information

For help click the question mark icon.

To sort on any column, click a column title.

Program Name	Total Program Costs	Eligible for financial assistance under the Workforce Innovation & Opportunity Act (WIOA)	Program Length	Available Scholarships
Accounting - Associate's Degree	$5,589.00	✔	69 Hours	✔
Accounting Certificate - Postsec. Awards/Cert./Diplomas: < 1 yr.	$3,645.00	✔	3 Semesters/Terms	✔
Administrative Professional Assistant - Postsec. Awards/Cert./Diplomas: < 1 yr.	$511.00		26 Weeks	✔
Advertising and Graphic Design - Associate's Degree	$5,589.00	✔	67 Hours	✔
Advertising and Graphic Design Certificate - Postsec. Awards/Cert./Diplomas: < 1 yr.	$972.00	✔	1 Semesters/Terms	✔

Choose Another Provider

Select another Education Service

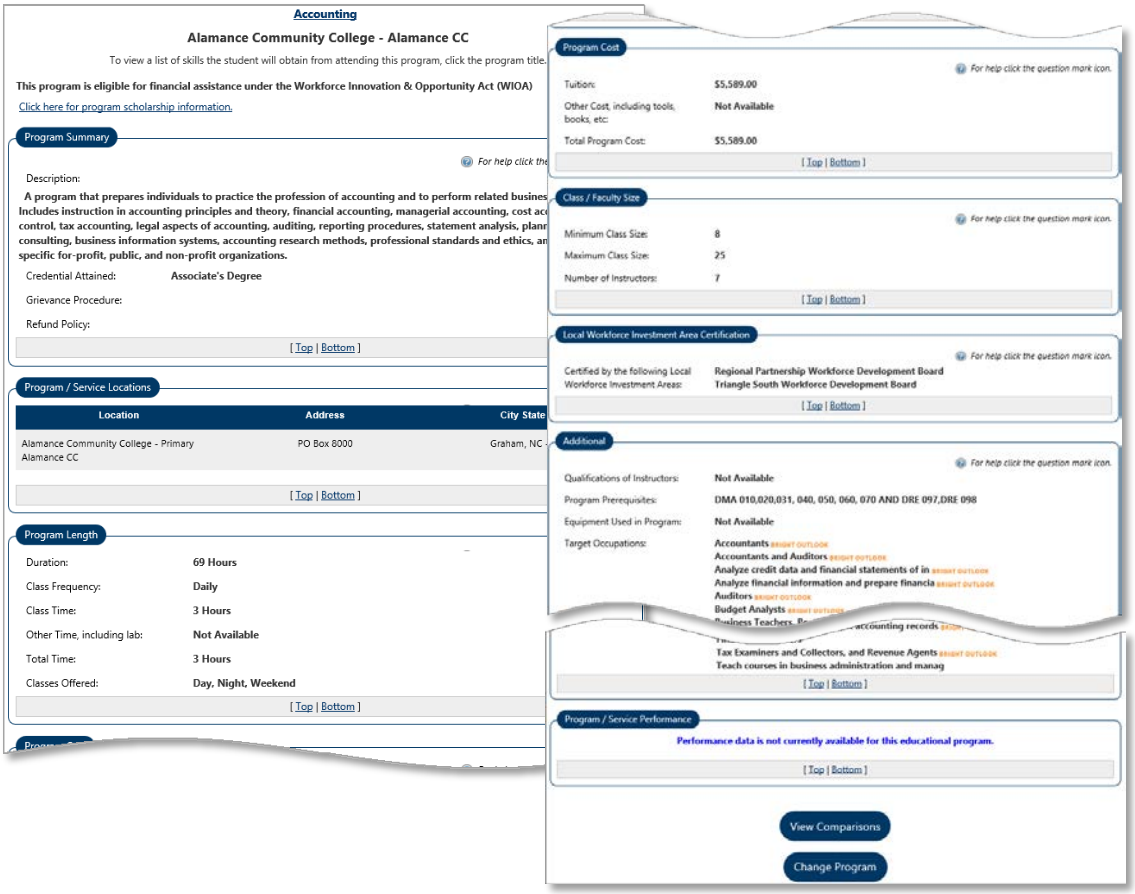
Educational Services Detail Screen

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 Map Address 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.

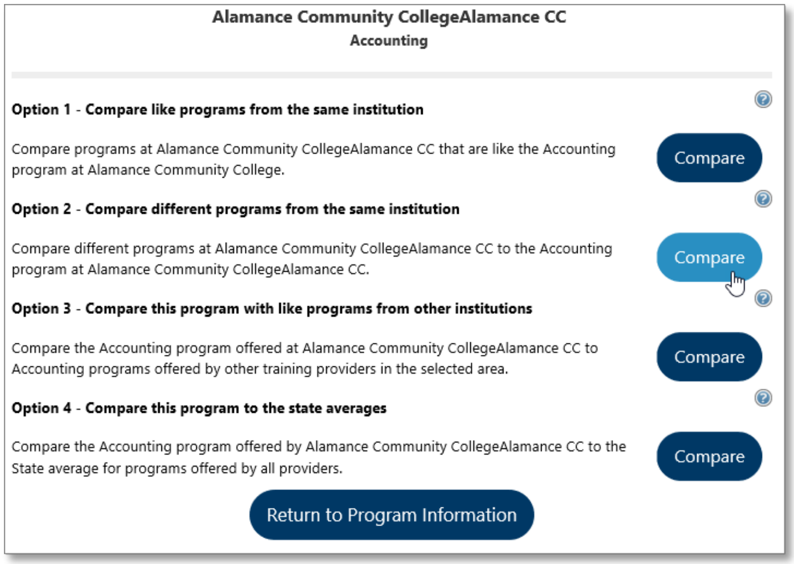
Note: *The View Comparisons option is available from the bottom of the Program Information screen regardless of whether the path to get there was through searching a provider/school to see a program listing or searching directly for a desired program. The options are described in the following topic.*

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

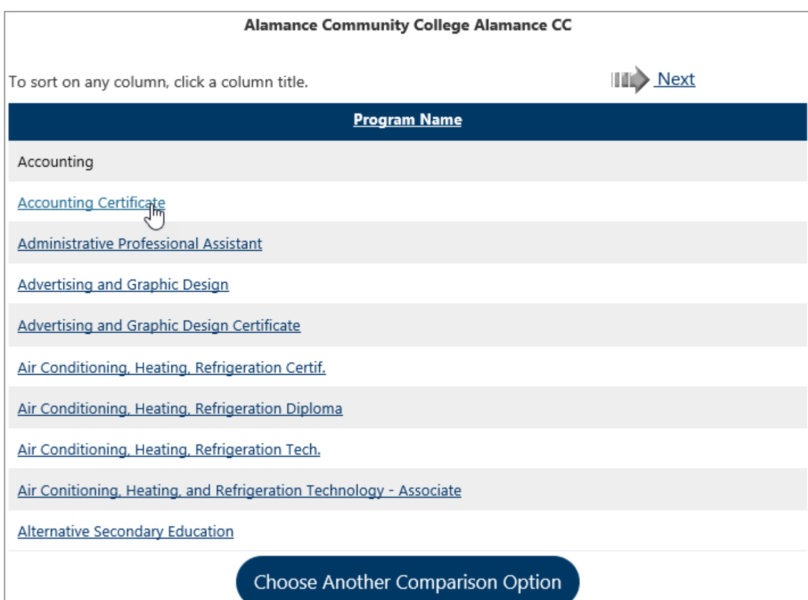
From this screen, you can select the four comparison options which are briefly described in the topics that follow:

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.

Comparing Accounting at Alamance Community College Alamance CC
to Accounting Certificate at Alamance Community College Alamance CC

Program Length Information

Measure	Accounting	Accounting Certificate
Duration	69 Hours	3 Semesters/Terms
Class Frequency	Daily	Daily
Day or Night Classes	Day and Night	Day and Night
Class Time, Other Time, including lab	3 Hours	3 Hours

Program Cost Information

Measure	Accounting	Accounting Certificate
Tuition	$5,589.00	$3,645.00
Other Cost, including tools, books, etc.	Not Available	Not Available
Total Program Cost	$5,589.00	$3,645.00

Class Information

Measure	Accounting	Accounting Certificate
Minimum Class Size	8	6
Maximum Class Size	25	20
Number of Instructors	7	7

Additional Information

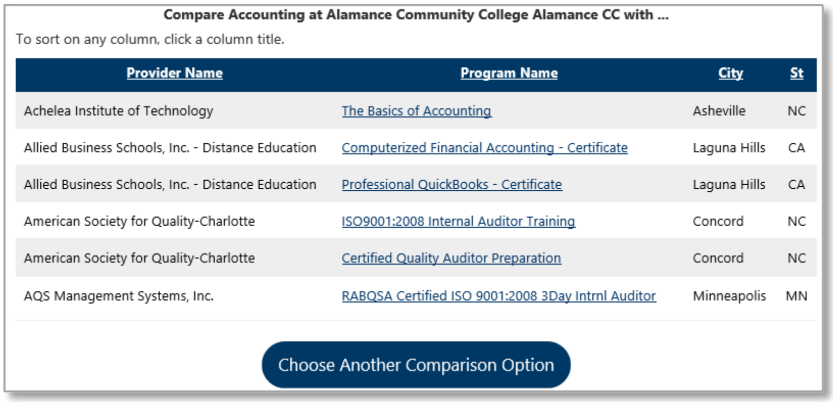
Measure	Accounting	Accounting Certificate
Credential Attained	Associate's Degree	Postsec. Awards/Cert./Diplomas; < 1 yr.
Qualifications of Instructors	Not Available	Not Available
Program Prerequisites	DMA 010,020,031, 040, 050, 060, 070 AND DRE 097,DRE 098	DMA 010, 020, 030, and DRE 097. ACC 115 and 120, 121
Equipment Used in Program	Not Available	Not Available
Target Occupations	Accountants Accountants and Auditors Analyze credit data and financial Budget Analysts Business Teachers, Postsecondary Credit Analysts Determine tax liability or collect taxes Financial Examiners Tax Examiners and Collectors, and Revenue Agents	Accountants Accountants and Auditors Analyze credit data and financial Business Teachers, Postsecondary Credit Analysts Determine tax liability or collect taxes Revenue Agents Teach courses in business Revenue Agents
Program may lead to obtaining a Green Job	No	No

Choose Another Comparison Option

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.



Compare Accounting at Alamance Community College Alamance CC with ...

To sort on any column, click a column title.

Provider Name	Program Name	City	St
Achelea Institute of Technology	The Basics of Accounting	Asheville	NC
Allied Business Schools, Inc. - Distance Education	Computerized Financial Accounting - Certificate	Laguna Hills	CA
Allied Business Schools, Inc. - Distance Education	Professional QuickBooks - Certificate	Laguna Hills	CA
American Society for Quality-Charlotte	ISO9001:2008 Internal Auditor Training	Concord	NC
American Society for Quality-Charlotte	Certified Quality Auditor Preparation	Concord	NC
AQS Management Systems, Inc.	RABQSA Certified ISO 9001:2008 3Day Intrnl Auditor	Minneapolis	MN

Choose Another Comparison Option

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 Length Information

Measure	Alamance Community College Alamance CC Accounting	AQS Management Systems, Inc. RABQSA Certified ISO 9001:2008 3Day Intrnl Auditor
Duration	69 Hours	3 Days
Class Frequency	Daily	Not Available
Day or Night Classes	Day and Night	Day and Night
Class Time, Other Time, including lab	3 Hours	0 Hours

Program Cost Information

Measure	Alamance Community College Alamance CC Accounting	AQS Management Systems, Inc. RABQSA Certified ISO 9001:2008 3Day Intrnl Auditor
Tuition	$5,589.00	Not Available
Other Cost, including tools, books, etc.	Not Available	$1,195.00
Total Program Cost	$5,589.00	$1,195.00

Class Information

Measure	Alamance Community College Alamance CC Accounting	AQS Management Systems, Inc. RABQSA Certified ISO 9001:2008 3Day Intrnl Auditor
Minimum Class Size	8	1
Maximum Class Size	25	Not Available
Number of Instructors	7	0

Additional Information

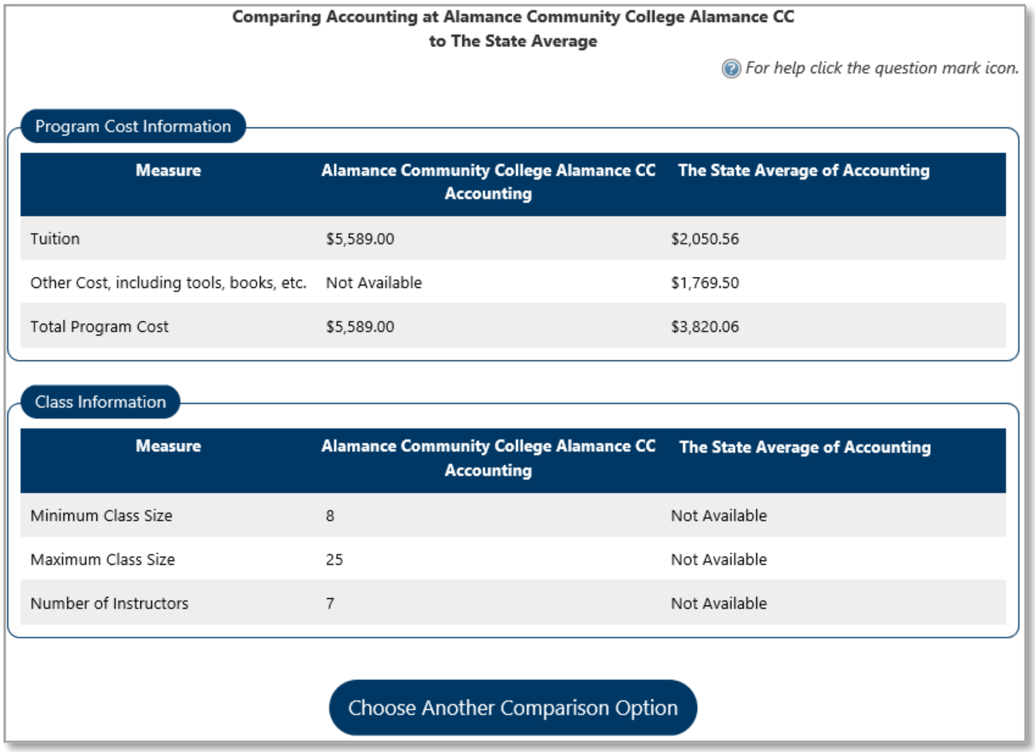
Measure	Alamance Community College Alamance CC Accounting	AQS Management Systems, Inc. RABQSA Certified ISO 9001:2008 3Day Intrnl Auditor
Credential Attained	Associate's Degree	Postsec. Awards/Cert./Diplomas; < 1 yr.
Qualifications of Instructors	Not Available	Not Available
Program Prerequisites	DMA 010,020,031, 040, 050, 060, 070 AND DRE 097,DRE 098	Not Available
Equipment Used in Program	Not Available	Not Available
Target Occupations	Accountants Accountants and Auditors Analyze credit data and financial statements of in Analyze financial information and prepare financia Auditors Budget Analysts Business Teachers, Postsecondary Credit Analysts	Accountants Accountants and Auditors Analyze financial information and prepare financia Auditors Enforce or ensure compliance with laws and regulat Examine and analyze accounting records to determin Examine, analyze, and interpret accounting records Financial Examiners
Program may lead to obtaining a Green Job	No	No

Choose Another Comparison Option

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.


Comparing Accounting at Alamance Community College Alamance CC to The State Average

For help click the question mark icon.

Program Cost Information

Measure	Alamance Community College Alamance CC Accounting	The State Average of Accounting
Tuition	$5,589.00	$2,050.56
Other Cost, including tools, books, etc.	Not Available	$1,769.50
Total Program Cost	$5,589.00	$3,820.06

Class Information

Measure	Alamance Community College Alamance CC Accounting	The State Average of Accounting
Minimum Class Size	8	Not Available
Maximum Class Size	25	Not Available
Number of Instructors	7	Not Available

Choose Another Comparison Option

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.

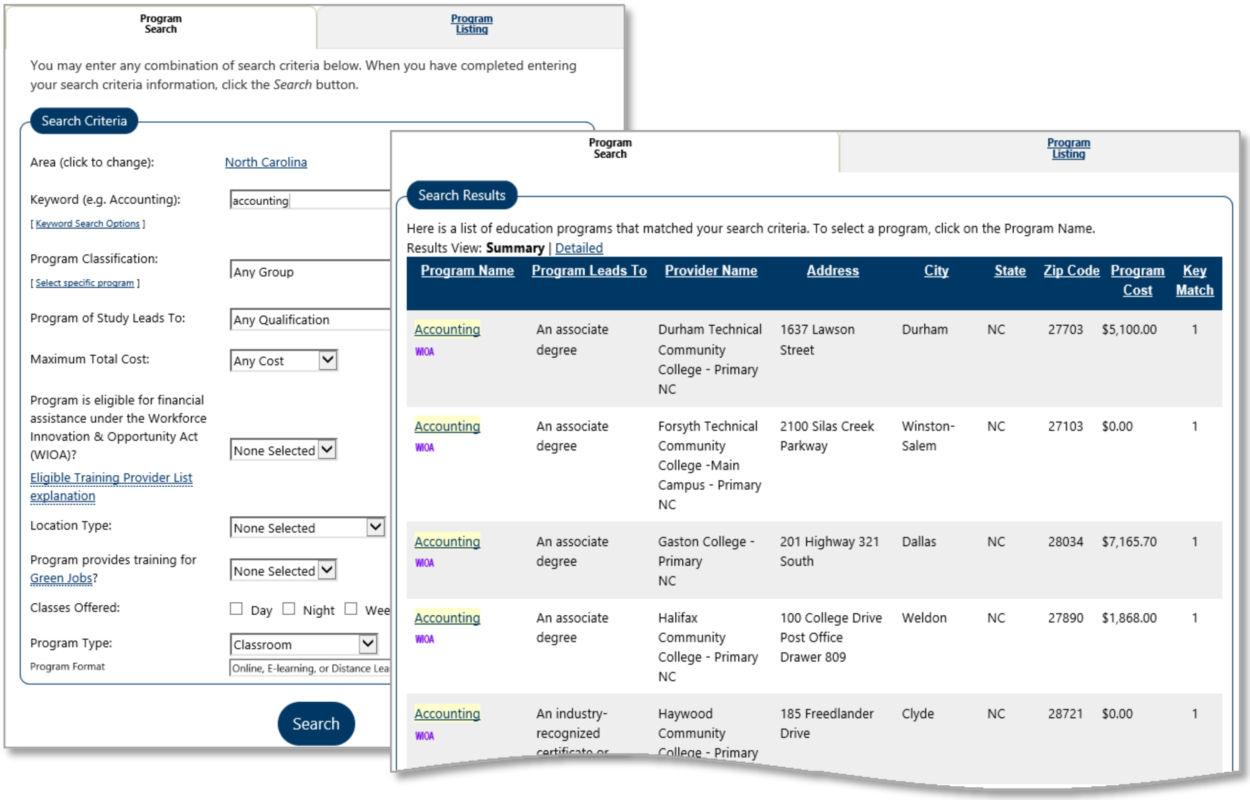
Based on provider reps' needs, they can also locate a specific training or educational program that is related to an occupation or field of interest, and then select the specific provider, and view the details for the program offered through that provider.

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

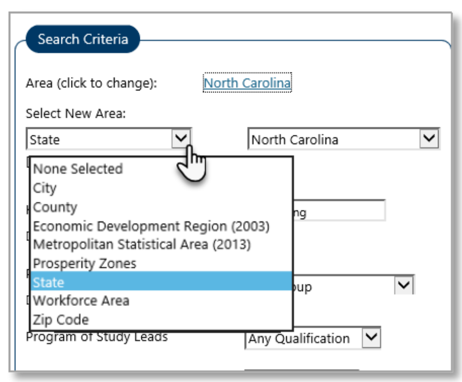
Click the Training and Education Programs link to locate a training or educational program that is related to your occupation or field of interest.

The following screen shows options for searching for a program.



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

Programs – Area Search Criteria

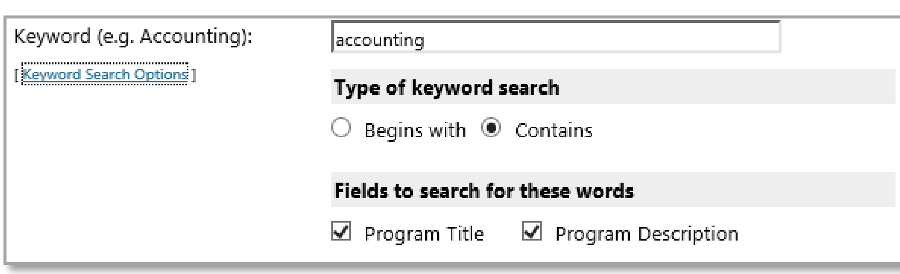


A sample of the Area options selectable for research criteria on this page are displayed at the right.

Click the Area 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

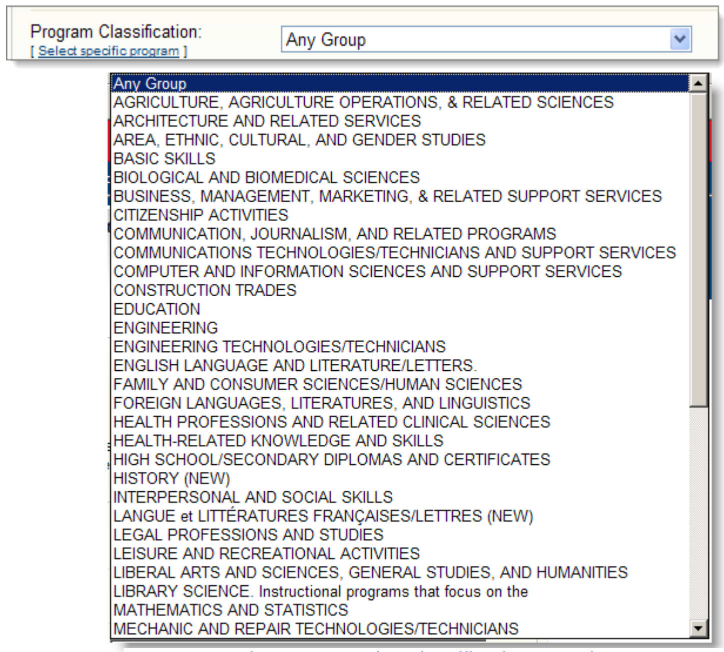
You can either just enter a keyword or phrase in the text box, or you can specify the type of keyword search by clicking on the Keyword Search Options link.



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).

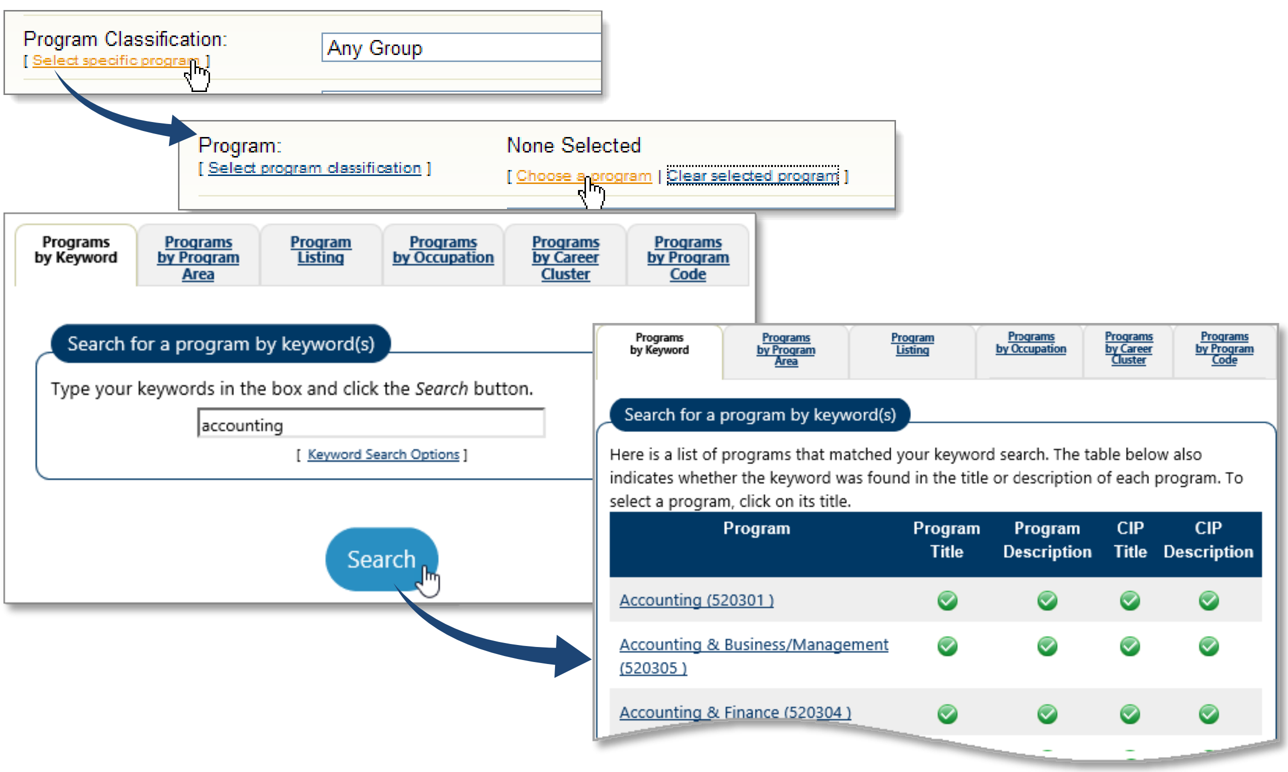


Select Program by Classification Dropdown

CIP Code selection by search window:

You can click the <u>Select program 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 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 Select program classification 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

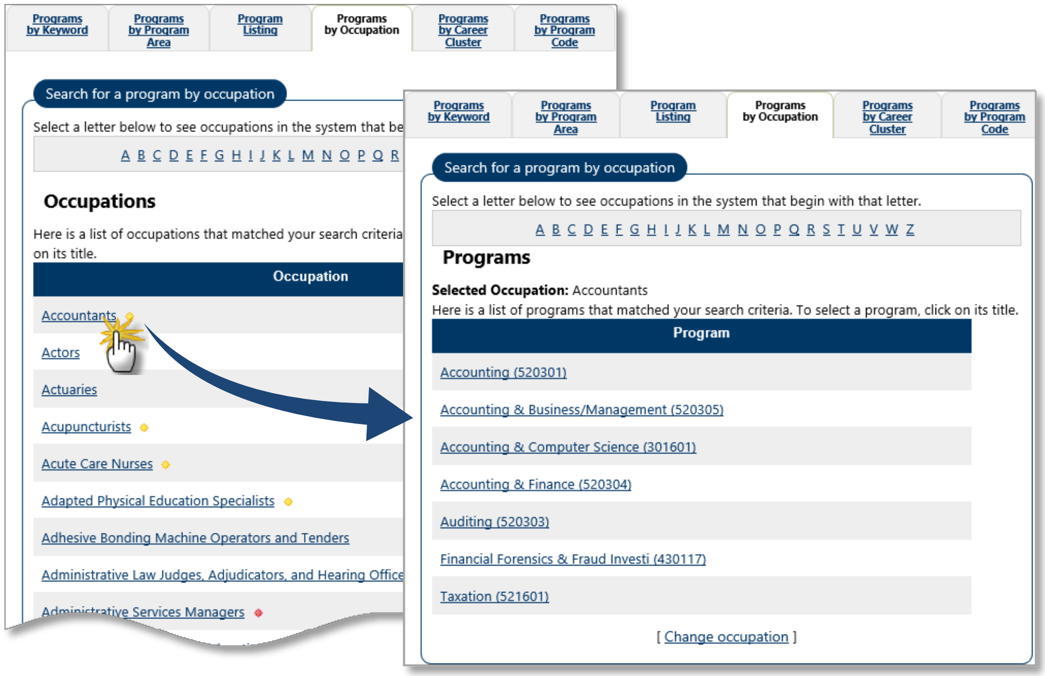
Click the *Programs by Program Listing* tab to choose from a list of programs in alphabetical order, similar to the following example.

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.

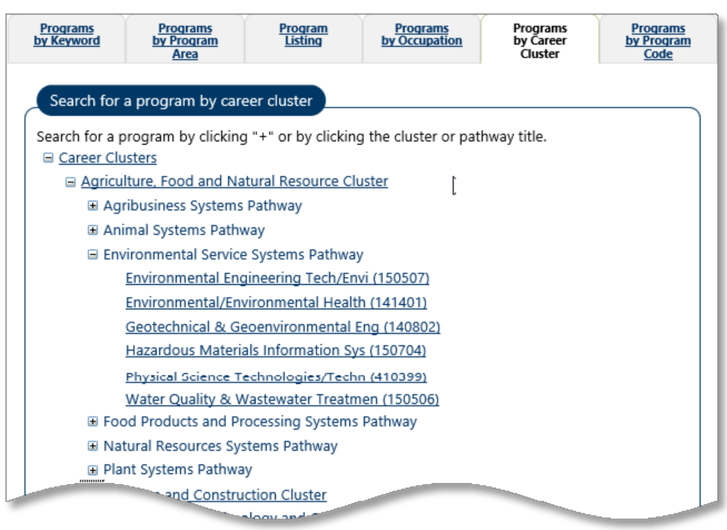


Programs by Occupation Code

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.

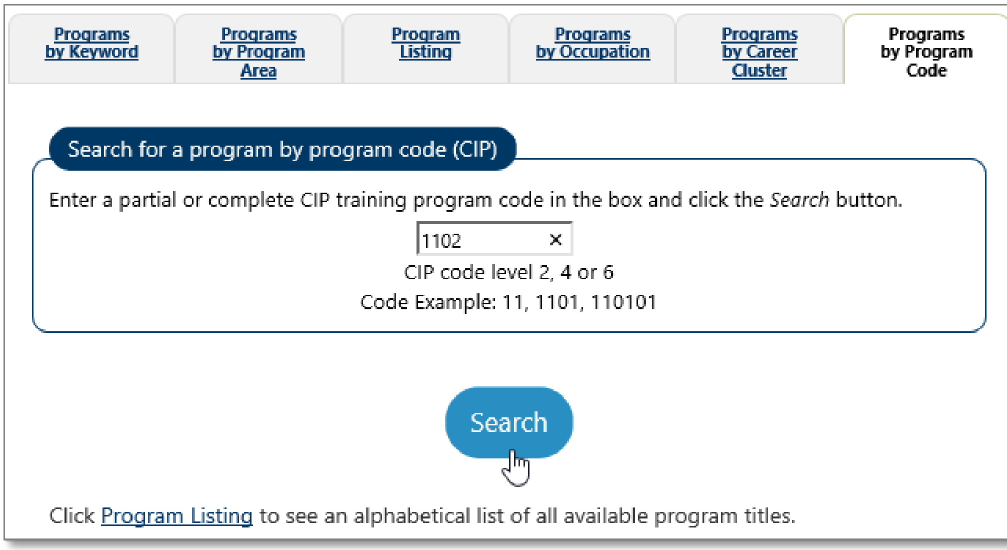


Select a Program by Career Cluster

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

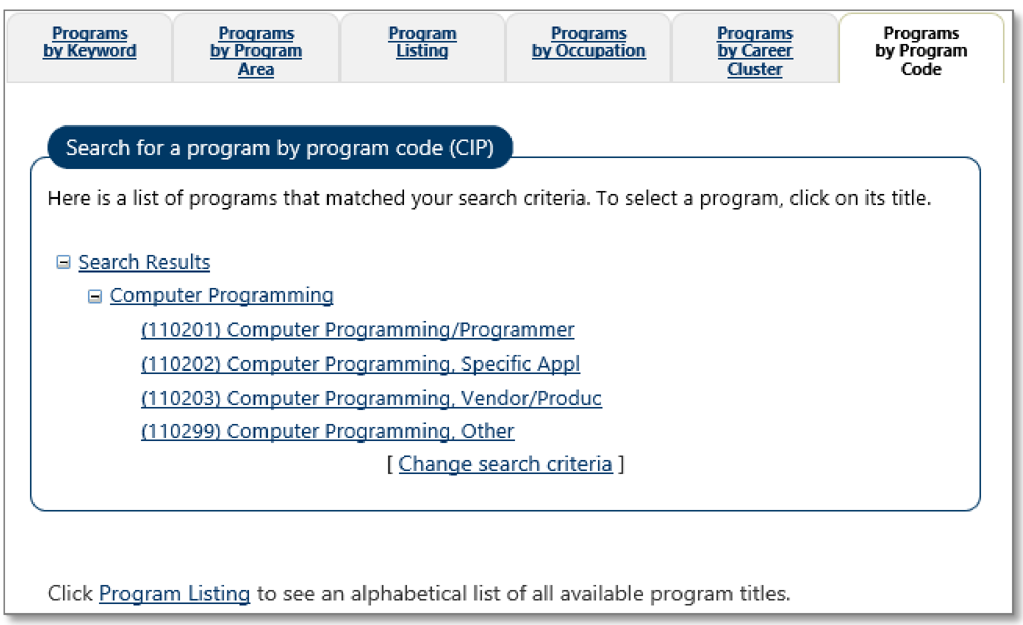
Programs Classifications – by Program Code Tab

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

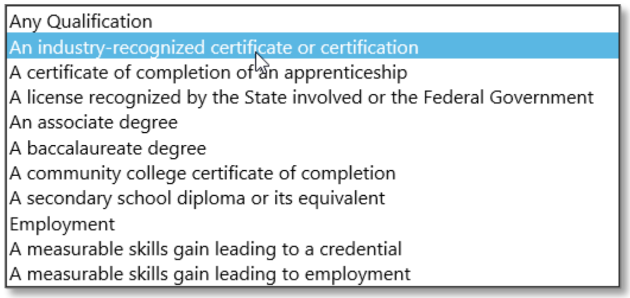
Based on the full or partial code that is entered, a screen will indicate the various options. In the following example, CIP code 1102 was entered. The search results indicated there were computer programming matches. If any of these are what you are searching, click that link to display educational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



CIP Program Search Screen

Program Search by "Program of Study Lead To"

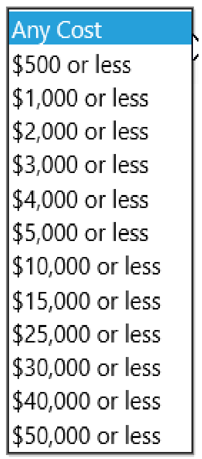
Individuals can search by program qualification using a drop-down to select the credential, skills gain, certificate, license of other measure tow which the program of study will lead.



Program of Study Leads To - Drop-Down

Program Search by Maximum Total Cost

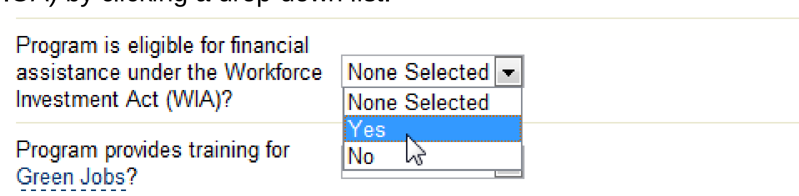
Individuals can search for programs by the maximum total cost, by clicking a drop-down selection from the list for total costs.



Maximum Total Cost 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 *Green Jobs*.

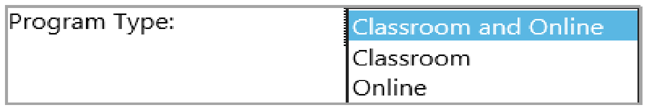
Program Search by Day or Night Classes

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

Day and Night Classes Selection

Program Search by Program Type

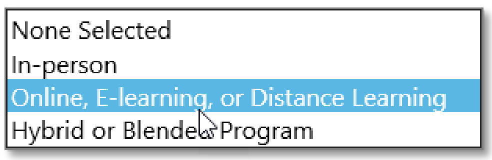
Individuals can search for programs that are Classroom and Online, Classroom only, or Online only by making a selection from the drop-down.



Program Type Search Options

Program Format

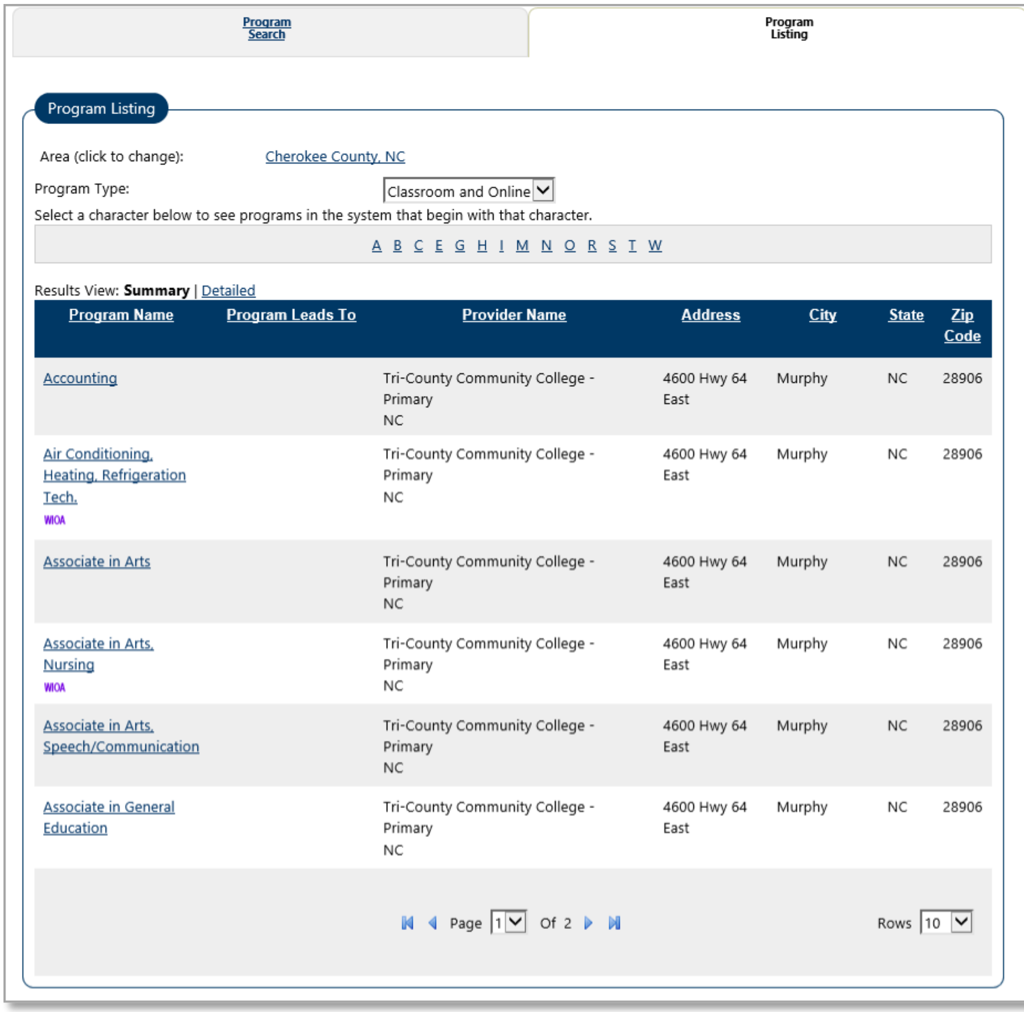
Individuals can search for programs that are Classroom and Online, Classroom only, or Online only by making a selection from the drop-down.



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 Search | Program Listing

Program Listing

Area (click to change): Cherokee County, NC

Program Type: Classroom and Online

Select a character below to see programs in the system that begin with that character.

A B C E G H I M N O R S T W

Results View: **Summary** | Detailed

Program Name	Program Leads To	Provider Name	Address	City	State	Zip Code
Accounting		Tri-County Community College - Primary NC	4600 Hwy 64 East	Murphy	NC	28906
Air Conditioning, Heating, Refrigeration Tech. WIOA		Tri-County Community College - Primary NC	4600 Hwy 64 East	Murphy	NC	28906
Associate in Arts		Tri-County Community College - Primary NC	4600 Hwy 64 East	Murphy	NC	28906
Associate in Arts, Nursing WIOA		Tri-County Community College - Primary NC	4600 Hwy 64 East	Murphy	NC	28906
Associate in Arts, Speech/Communication		Tri-County Community College - Primary NC	4600 Hwy 64 East	Murphy	NC	28906
Associate in General Education		Tri-County Community College - Primary NC	4600 Hwy 64 East	Murphy	NC	28906

Page 1 Of 2 Rows 10

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.

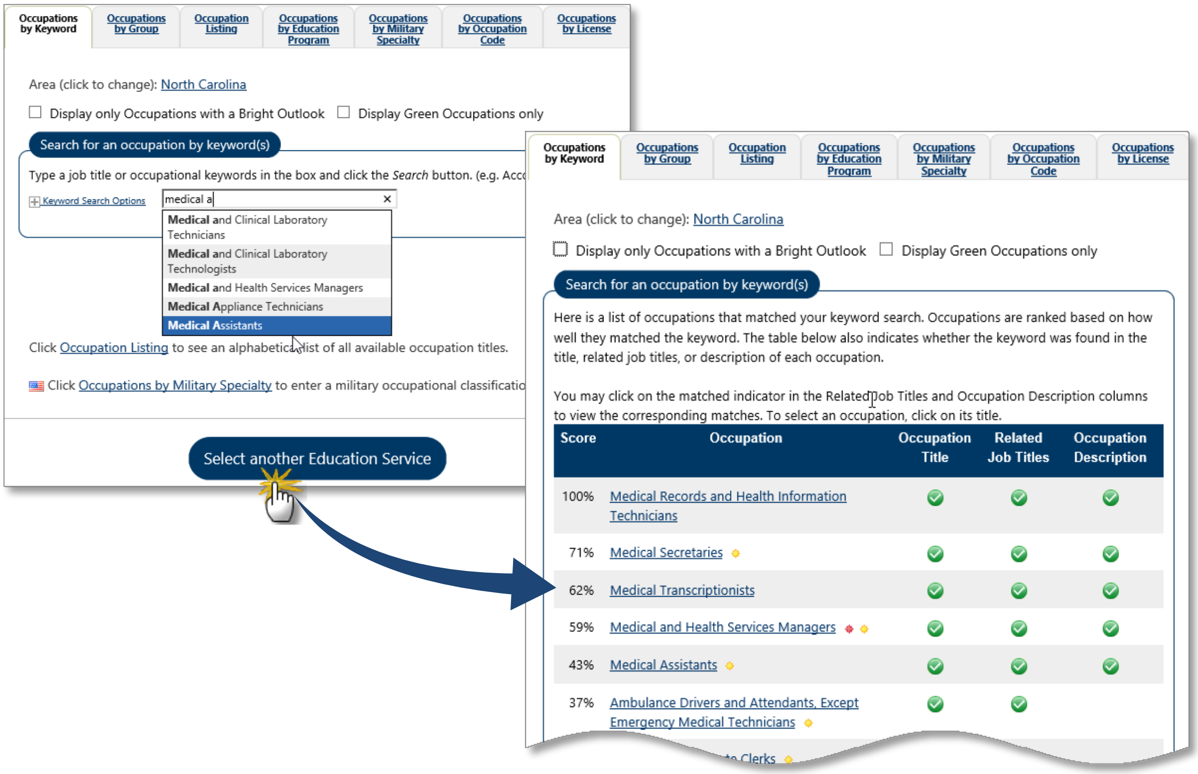
— OR —

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):

Displayed below are completers for Allied Health and Medical Assisting Services, Other in North Carolina for the year 2015

Completer Type	Completers
Allied Health and Medical Assisting Services, Other - Postsec. Awards/Cert./Diplomas; 1-2 yrs.	72
Medical Administrative/Executive Assistant & Medical Secretary - Postsec. Awards/Cert./Diplomas; < 1 yr.	91
Medical Administrative/Executive Assistant & Medical Secretary - Postsec. Awards/Cert./Diplomas; 1-2 yrs.	4
Medical Insurance Coding Specialist/Coder (NEW) - Associate's Degree	8
Medical Insurance Coding Specialist/Coder (NEW) - Postsec. Awards/Cert./Diplomas; 1-2 yrs.	165
Medical Office Assistant/Specialist (NEW) - Postsec. Awards/Cert./Diplomas; 1-2 yrs.	45
Medical Office Management/Administration - Associate's Degree	1,047
Medical Office Management/Administration - Postsec. Awards/Cert./Diplomas; < 1 yr.	1,251
Medical Office Management/Administration - Postsec. Awards/Cert./Diplomas; 1-2 yrs.	385
Medical/Clinical Assistant - Associate's Degree	831
Medical/Clinical Assistant - Postsec. Awards/Cert./Diplomas; < 1 yr.	81
Medical/Clinical Assistant - Postsec. Awards/Cert./Diplomas; 1-2 yrs.	807
Opthalmic Technician/Technologist - Postbaccalaureate Certificates	12
Opthalmic Technician/Technologist - Postsec. Awards/Cert./Diplomas; 1-2 yrs.	32
Optomeric Technician/Assistant - Postsec. Awards/Cert./Diplomas; < 1 yr.	4

Records per page: 25 Go

[Choose another Occupation]

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

Online Learning Resources

This page contains links to websites that offer a variety of online learning and training courses to expand knowledge and skills. The links are grouped into the following sections:

I need information about...
ALISON Online Courses
Workplace Skills
Education (K-12 and College)
Business and Technology
Writing and Language
Miscellaneous Online Resources

Any costs associated with the following online learning resources are the responsibility of the student.

ALISON ONLINE COURSES
TOP

Alison

ALISON is one of the world's largest free learning resources with free access to 900+ courses at Certificate, Diploma, and Learning Path levels in 16 categories including: IT, Language, Science, Business, Humanities, Health, Math, Software Development, Marketing, Lifestyle, Life Science, Software Engineering, Health Care, Operations and Skilled Trades.

Empower yourself with Alison courses to become more competitive in the workplace or simply learn for personal development. Click the link to review a course or share with friends, family or work colleagues.

Alison may charge the learner a nominal cost for certificates or parchments related to course completions.

WORKPLACE SKILLS
TOP

GCFLearnFree.org - Funded by the Goodwill Community Foundation, GCFLearnFree.org provides free computer, technology, and life skills training online. Users can sign up for scheduled online classes, or take any of the free tutorials at their own pace. Popular topics include **computer technology**, **math and money basics**, **career** and **workplace** development, and other everyday life skills.

Vocational Information Center - The Vocational Information Center website is a directory that provides links to online resources for career exploration, career and education, work opportunities, trade and technical schools, and career-related references.

About.com Distance Learning - Languages - About.com's Distance Learning site provides links to resources that offer free online instruction in a variety of languages, including the common (French, German, Italian) to the uncommon (Arabic, Armenian, Hebrew).

MISCELLANEOUS
TOP

Citizenship Resource Center - The website for U.S. Citizenship and Immigration Services provides free resources to immigrants, including preparation materials for citizenship tests.

Learn CPR - Learn CPR is a free public service supported by the University of Washington School of Medicine. Learn the basics of CPR - cardiopulmonary resuscitation - using instructional guides and video demonstrations.

Checking Account Tips - Provides tips on how to effectively maintain a checking account

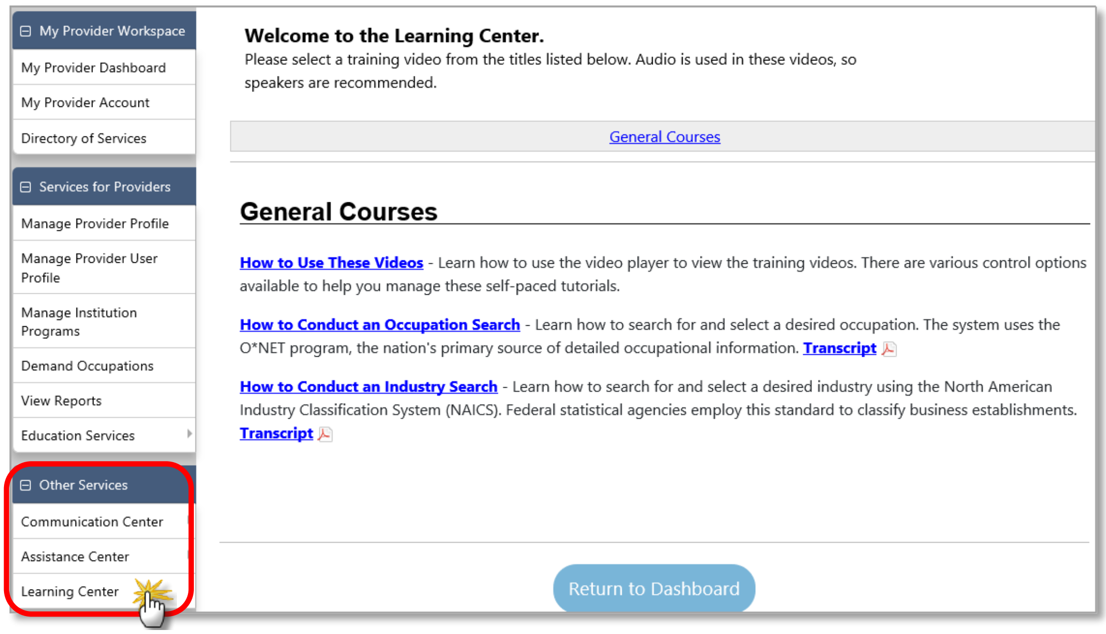
Select another Education Service

Sample Online Resource Page

4: Provider User: Other Services

Chapter Contents

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: *Other Services will only display after staff enables the Provider Rep. 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

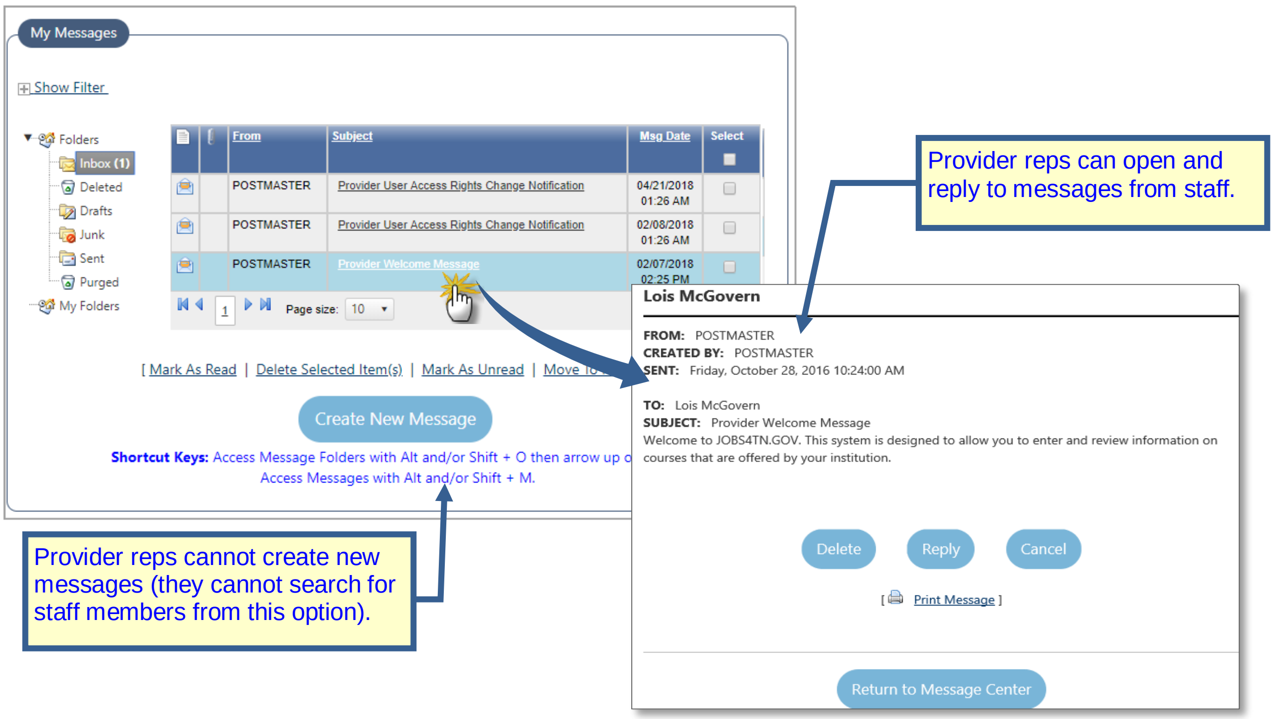
Communications Center

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 Delete Selected Item(s) link at the bottom of the screen.
- **Filter messages** – Click the [+] Show Filter Criteria link to open the filter fields. Enter a date range in the *Date Range* fields (*From* date and *To* date) and click the Filter link. The screen will refresh, displaying only messages received during that date range. To clear the filter, click the Reset Filter link.

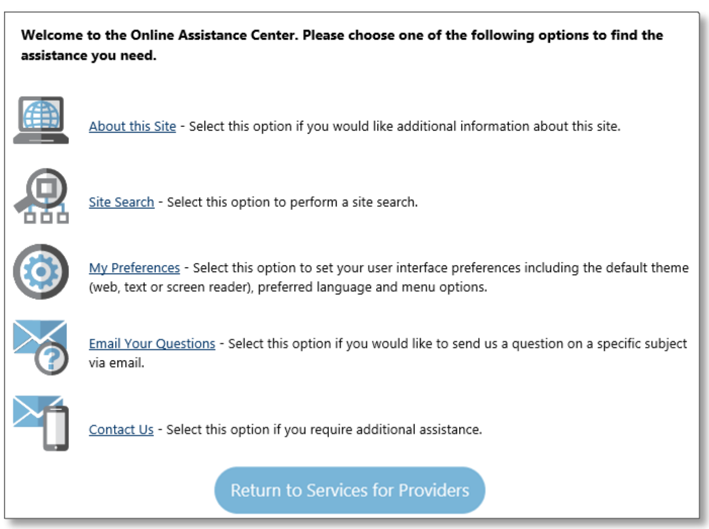
Message Filter

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

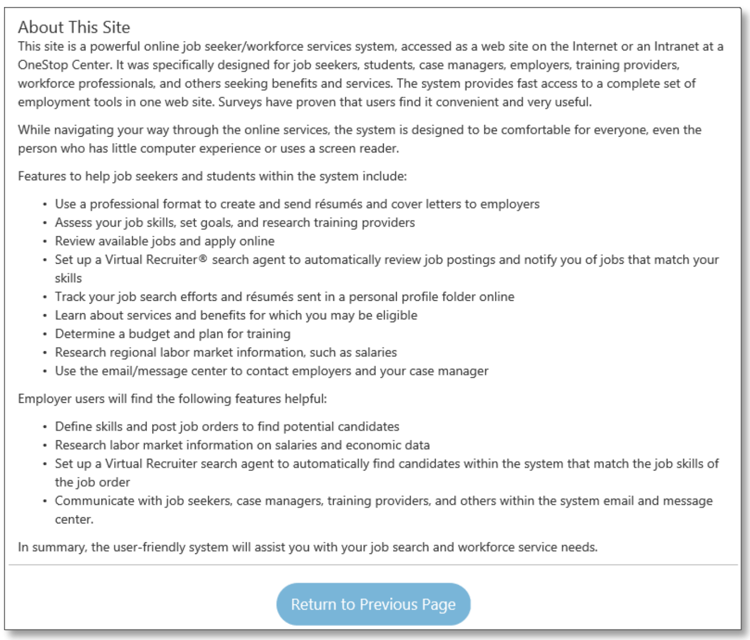
- **About this Site** – Select this option to view additional information about this site, and its services.

- **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

This site is a powerful online job seeker/workforce services system, accessed as a web site on the Internet or an Intranet at a OneStop Center. It was specifically designed for job seekers, students, case managers, employers, training providers, workforce professionals, and others seeking benefits and services. The system provides fast access to a complete set of employment tools in one web site. Surveys have proven that users find it convenient and very useful.

While navigating your way through the online services, the system is designed to be comfortable for everyone, even the person who has little computer experience or uses a screen reader.

Features to help job seekers and students within the system include:

- Use a professional format to create and send résumés and cover letters to employers
- Assess your job skills, set goals, and research training providers
- Review available jobs and apply online
- Set up a Virtual Recruiter® search agent to automatically review job postings and notify you of jobs that match your skills
- Track your job search efforts and résumés sent in a personal profile folder online
- Learn about services and benefits for which you may be eligible
- Determine a budget and plan for training
- Research regional labor market information, such as salaries
- Use the email/message center to contact employers and your case manager

Employer users will find the following features helpful:

- Define skills and post job orders to find potential candidates
- Research labor market information on salaries and economic data
- Set up a Virtual Recruiter search agent to automatically find candidates within the system that match the job skills of the job order
- Communicate with job seekers, case managers, training providers, and others within the system email and message center.

In summary, the user-friendly system will assist you with your job search and workforce service needs.

Return to Previous Page

About this Site (Sample Page)

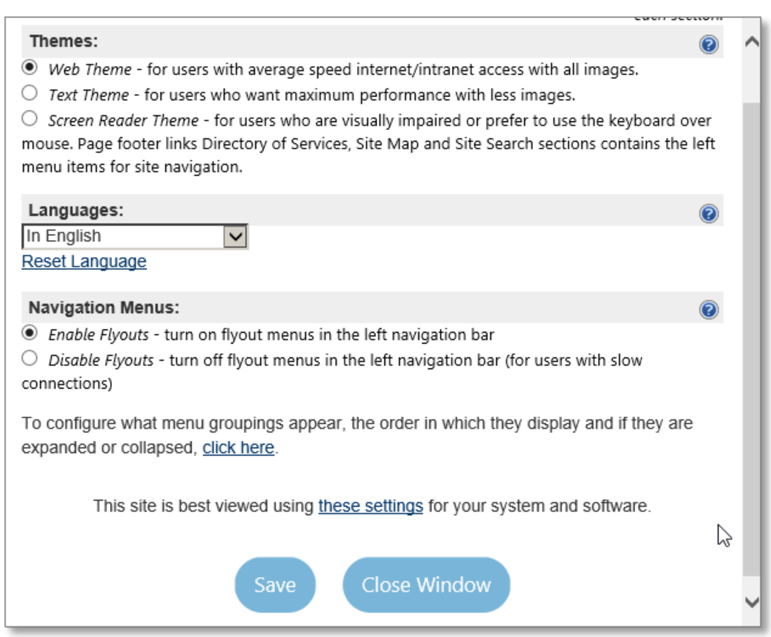
Site Search

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

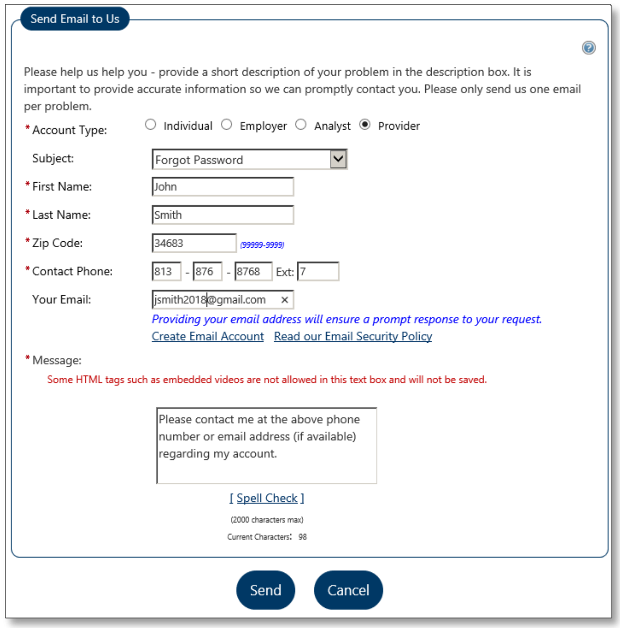
Click the My Preferences link to set your user preferences for this system. Depending upon your system's configuration, you may be able to choose options for themes (graphics versus text-only), preferred language, and navigational preferences.



My Preferences Options Screen

Email Your Questions

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

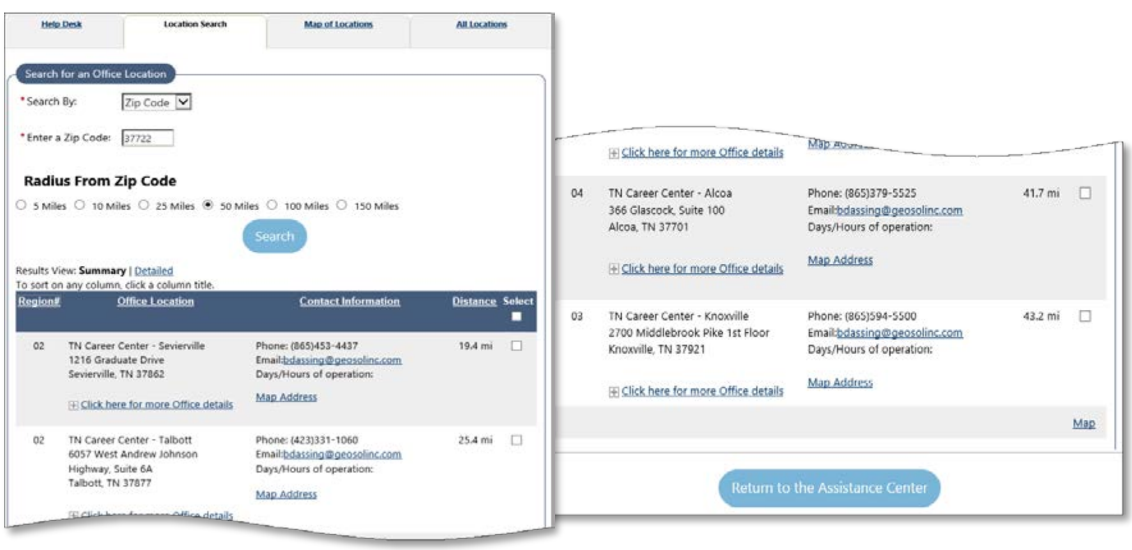


Email Your Questions Screen

Contact Us Directly

Click the Contact Us Directly 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:



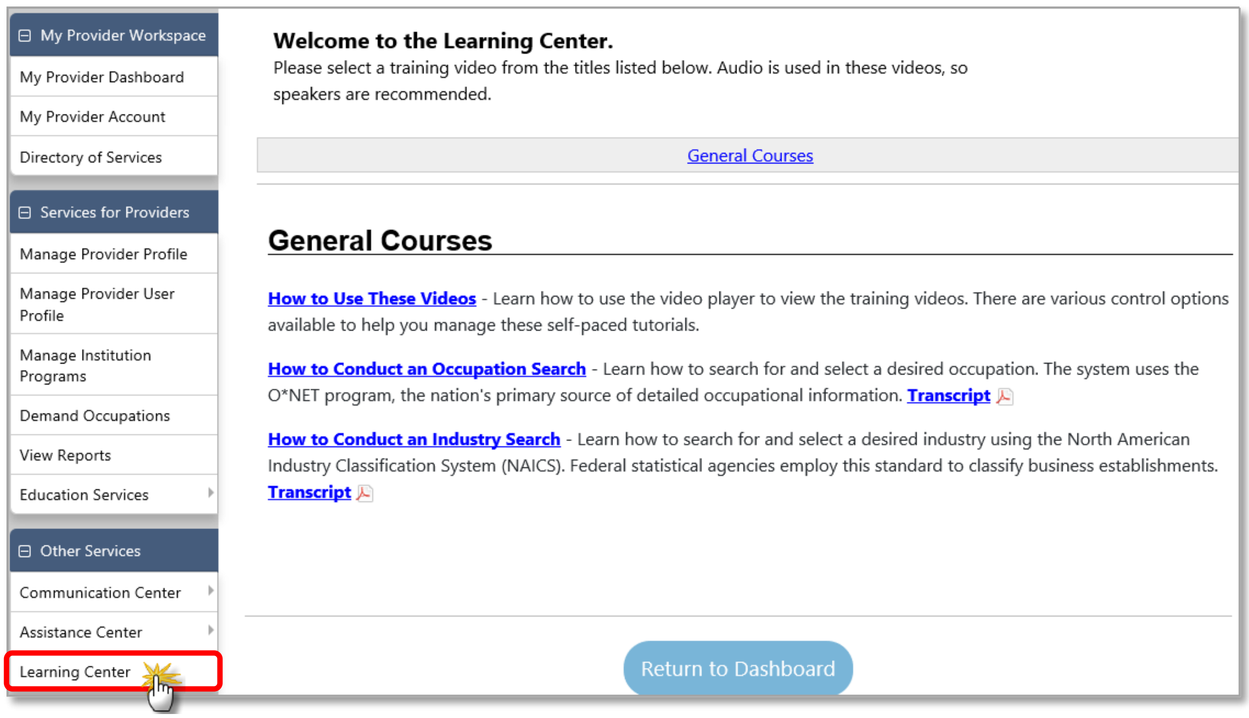
Contact Us Directly – Office Near You Tab – ZIP Code Search

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 a specific user's needs. These self-paced tutorials present detailed demonstrations to help provider reps take advantage of the various system resources available.

Check the Learning Center periodically to see if new videos have been added. If you desire a specific video, or need more information, you can also use the contact tab to identify an appropriate center and how to contact them. See the previous topic, Contact Us



Learning Center – Provider Courses

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5: Initial Staff Provider Access

Chapter Contents

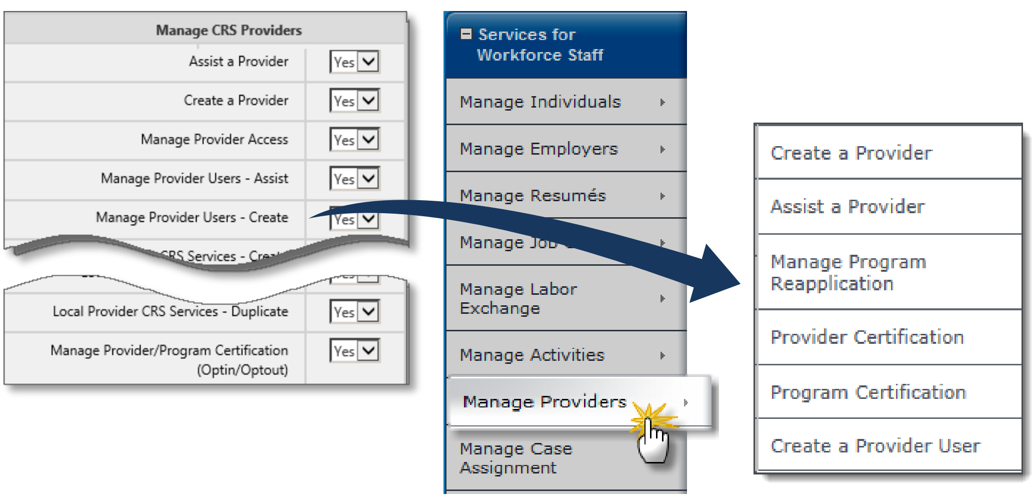
Unlike the Provider Users who register themselves, the workforce staff providers, who are given the abilities to create and manage providers, do not register for their provider capabilities. Their abilities are granted by an Administrator. This is true whether the provider system is part of a full Virtual 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.

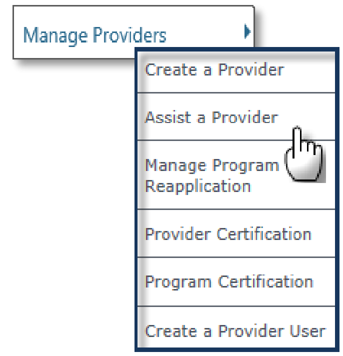
The figure below shows a portion of the Admin privileges screen, and the menu options available to a provider staff member with all services turned on by the administrator.



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:

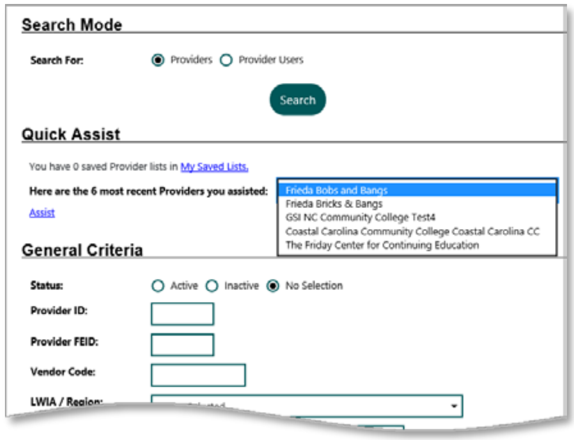
  - **Provider Details** *(Section 1)* – Includes basic info like: active/inactive status, FEID/SSN, name and type of business, physical, billing, and mailing addresses.
  - **Provider Type Details** *(Section 2)* – This shows a tree structure and lets staff select types of Contract Services (CS), Program 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)*.

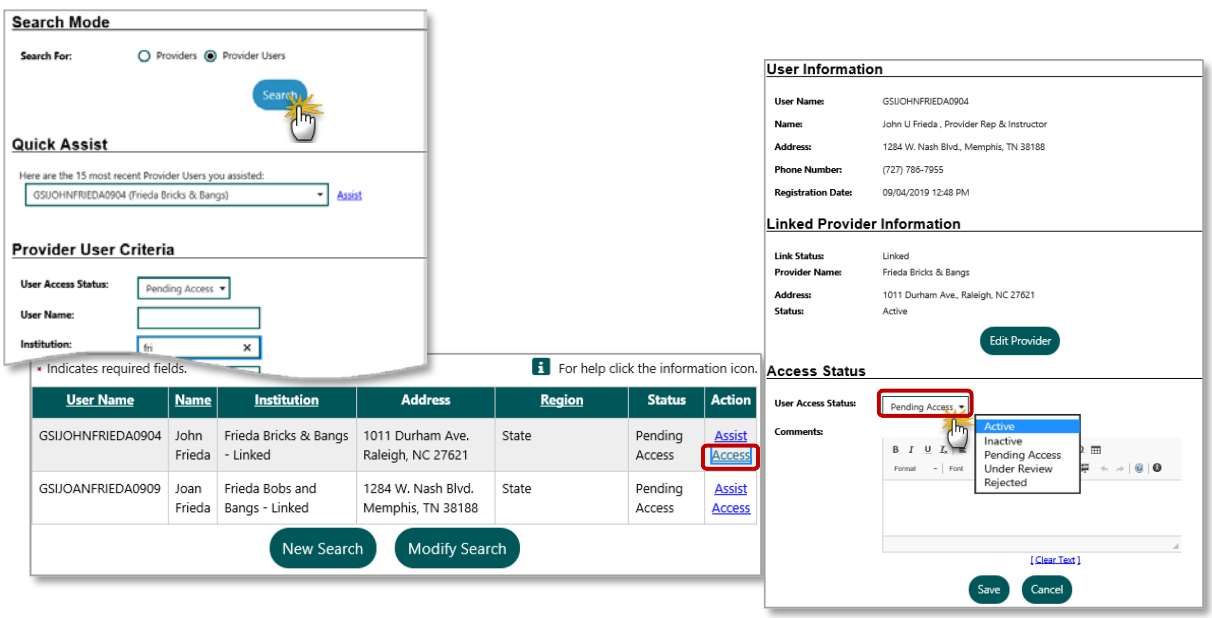
- **Assist a Provider** – This option is a quick, search tool to let staff select the provider institution, or the provider user, they want to assist (i.e., it is where staff goes to *activate* the provider institutions and the provider users associated with them). It is also a powerful means of access 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 Institution (left button at top of screen)

- **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.



Selecting a Provider User for Access (right button at top of screen)

> ***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.

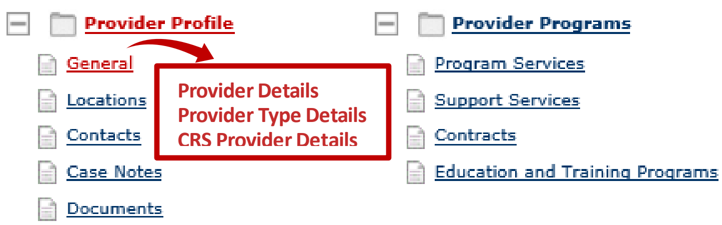
  For more details, see Chapter 10: *Program Certification (Opt In/Out).*

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

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.



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 Type Details** *(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)

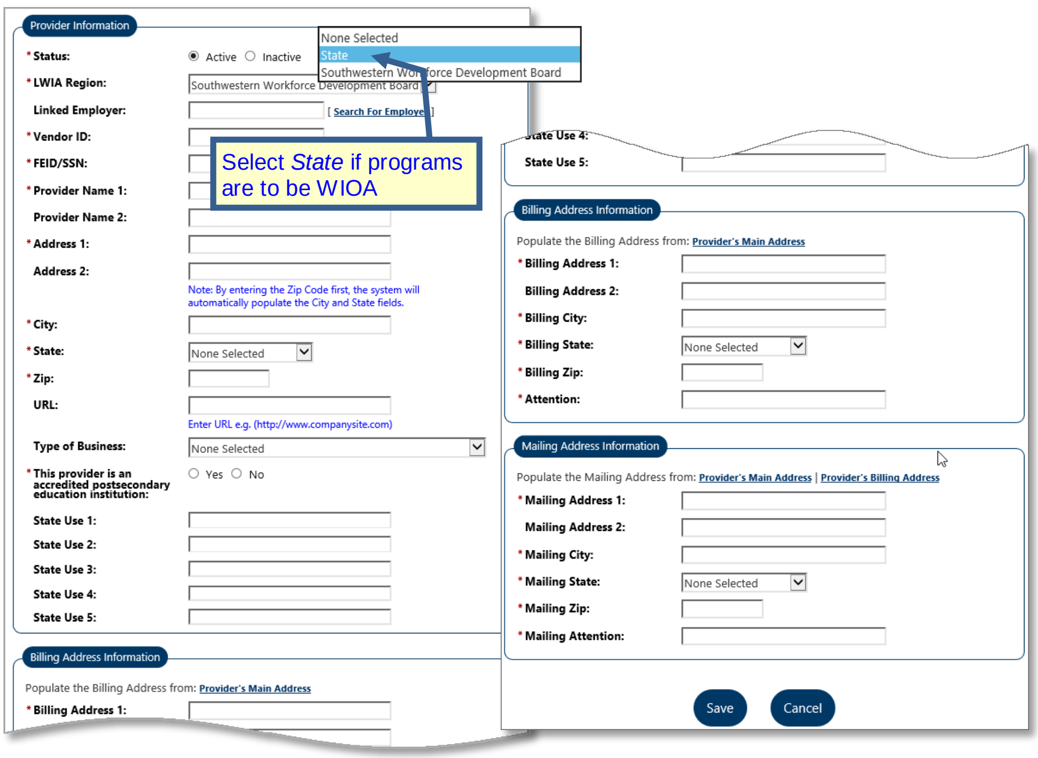
2 Enter or select data in the Provider Information area.

- 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 *Search for Employer* 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**.

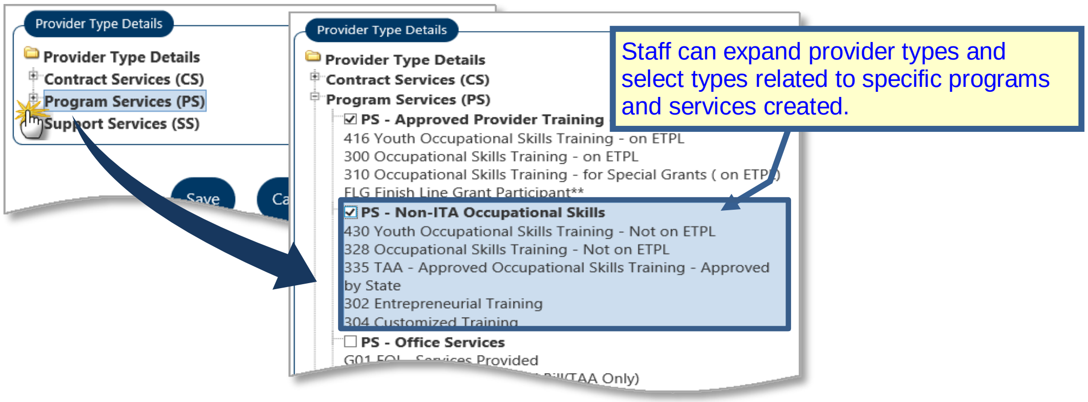
The Provider Type Details tree is displayed next.

Note: *All fields on the screen are enabled for staff, who will have access to the folder and files after creation. Staff-only fields are disabled/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.



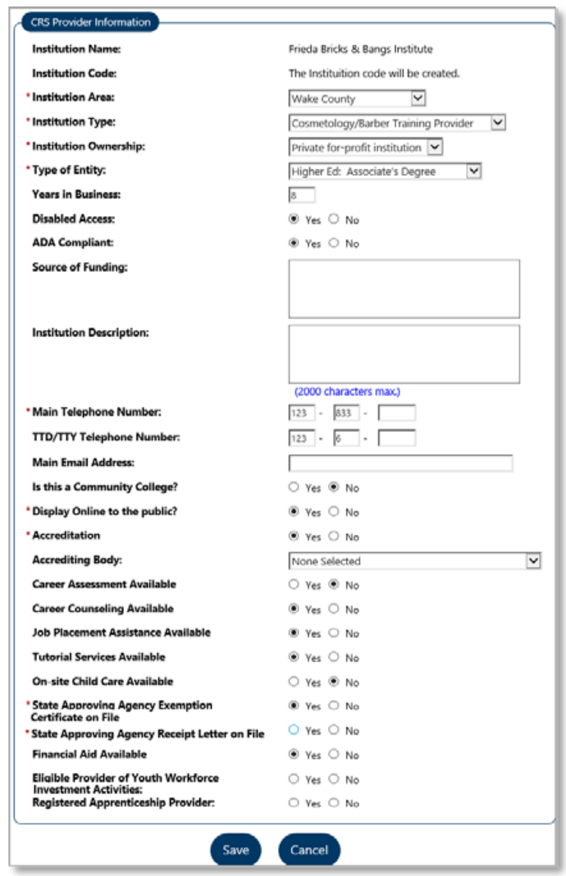
Provider Type Details Selection

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**.

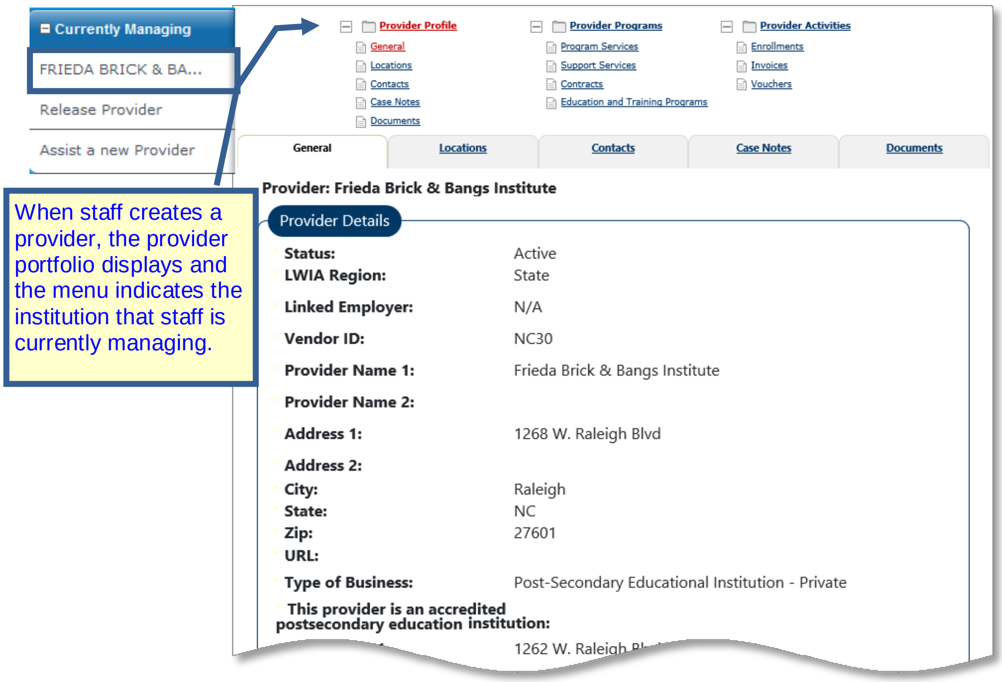
The system displays the General tab with all the information that you saved for the Provider Details, the Provider Type Details, and the CRS Provider Details.

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).*

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

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 enable provider access and to manage their details, capabilities, and programs. Staff can select providers from a list to:

- **Provide Access** – Staff can use the Assist a Provider option to:
  - Quickly review and/or activate the institution, or
  - Assist a provider user to enable access rights for that user.

  Note: *If provider user register themselves for a new or inactive institution, staff must first activate the institution, and then enable the provider user.*

- **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 the different capabilities that all start from the **Assist a Provider** search screen, 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: *This same initial search (to assist a provider) is used in the next chapter, as the beginning of the option for managing programs and services for the provider.*

Activating a Provider Institution

At their simplest, the steps to find and activate an inactive Provider Institution are:

1. Select **Manage Providers ▸ Assist a Provider** to open the Provider Search screen.
2. Enter search criteria, to list the providers needing activation (e.g., search for *Inactive* status).
3. Click **Search** button.
4. From search results, click a Profile link to open the General tab for an inactive provider.
5. Click the Edit Provider Detail link to open the **Provider Details** screen.
6. Then click the **Active** radio button at the top of screen (and enter any missing data).
7. Click **Save** to save changes and activate the provider.

Note: *If the Institution Code or* Institution Area *does not exist, you must enter it in a CRS Details screen, before you can activate the provider. A popup message will indicate this and direct you to a CRS screen. After you enter and save CRS data, return to step 5 to activate the provider.*

As staff use these steps to identify and activate provider institutions, they may need to use complex search criteria, or make entries in additional fields beyond simply marking the provider as *Active.* The following descriptions elaborate on the basic steps indicated above.

▶ To Find and Activate a Provider Institution (more details)

1. Select **Manage Providers ▸ Assist a Provider** (from the left navigation menu).

   This opens the Provider Search screen that is used to find Provider Intuitions of Provider Users.

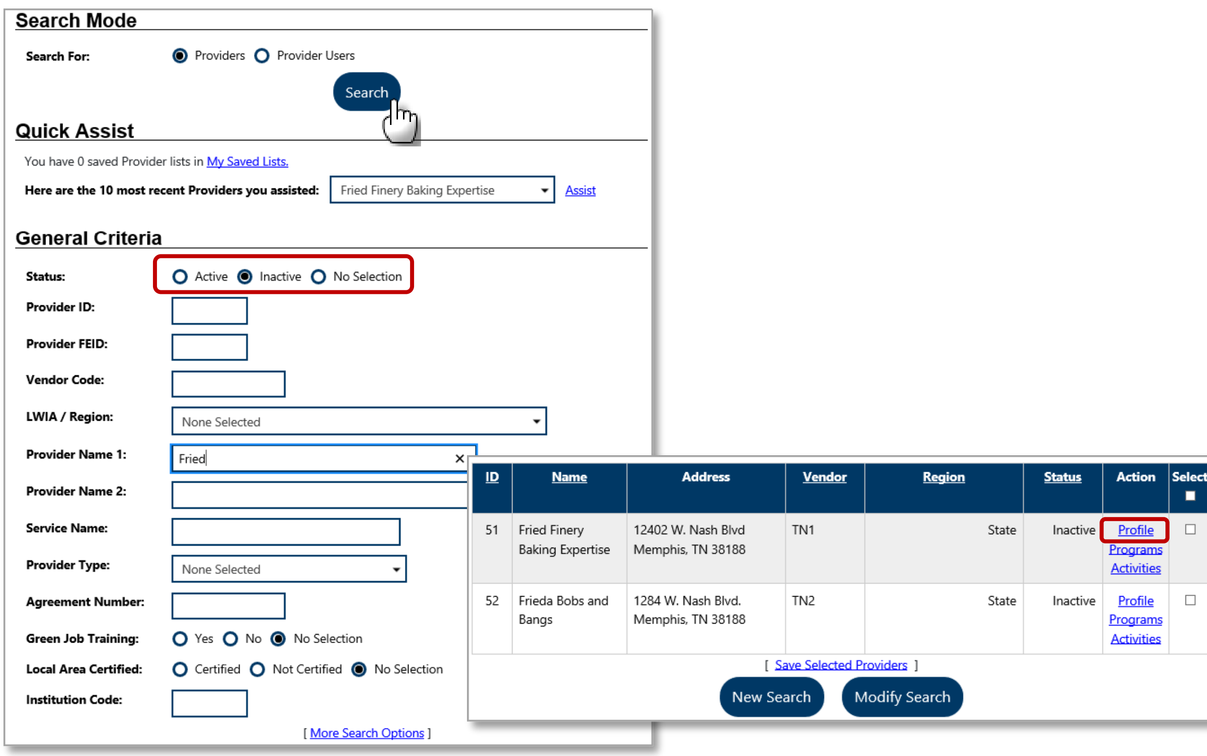
2. Select the **Provider** radio button at the top of the screen (if not already selected), and identify the search criteria in the **General Criteria** section.

   For example, you can select the *Inactive* radio button in the first field, Status, if you know the provider is inactive. This can be used with other criteria, such as a partial Vendor Name (as shown in the figure below).

   Note: *There is a* More Search Options *link at the bottom of the search screen to which will open additional areas, if more specific criteria is needed to find a provider.*

3. Click the **Search** button.

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



Searching for Inactive Providers (with a Partial Provider Name)

4. Click the Profile link (in the Action column) for the provider institution that you want to activate.

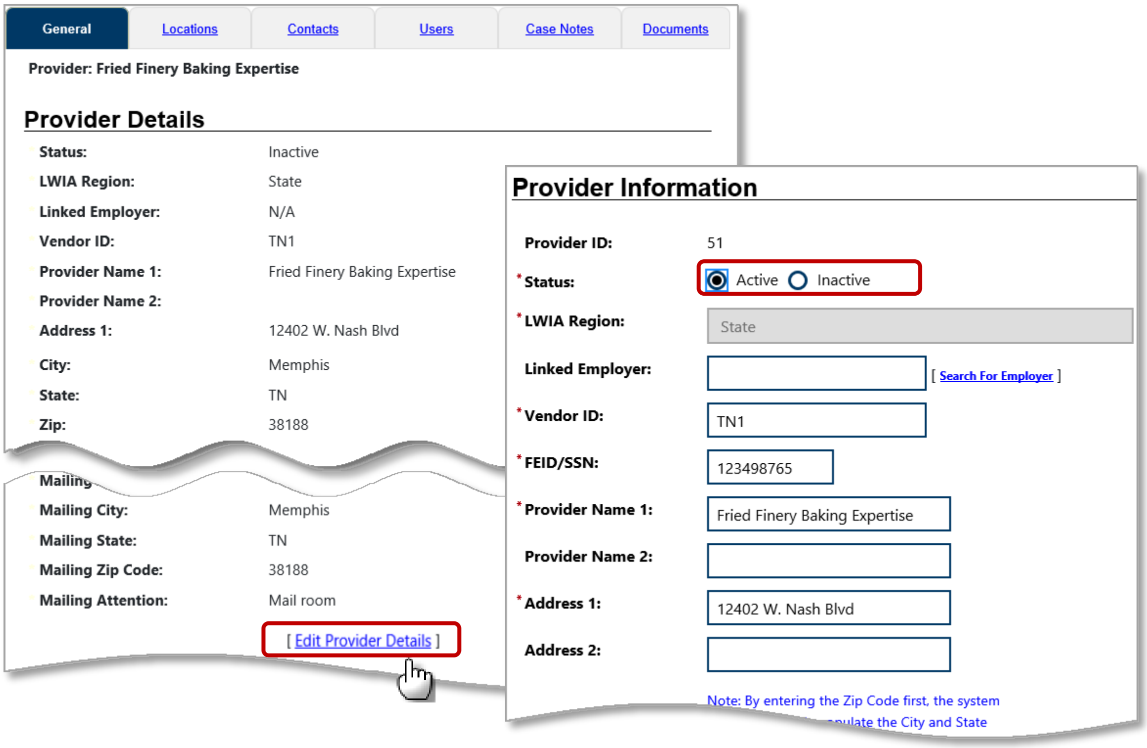
   This opens the General tab in the Provider folder (the tab where status can be changed).

5 Click the Edit Profile Details link at the bottom of the Provider Details section.

This opens the provider record in editing mode, for the Provider Information, Billing Address, and Mailing Address sections (as shown on the next page).

6 Click the **Active** radio button (the Status field, at the top of the screen).

- Also review the other information on the screen.
- Make any other needed changes or entries in the Provider Information area. For example, a Vendor ID and whether the provider is an accredited post-secondary education institution (Yes or No) are required fields.



Activating a Provider: Changing the Status in the General Tab

7 Click the **Save** button (at the bottom of the screen).

The data is saved and the *General* tab of Provider Profile is redisplayed.

Note: *If an Institution Code or Institution Area has not been entered, you must enter it in CRS Details before you can activate the provider. For example, if a provider user registered their institution as a state provider, the Institution Area may still be empty in CRS Details.*

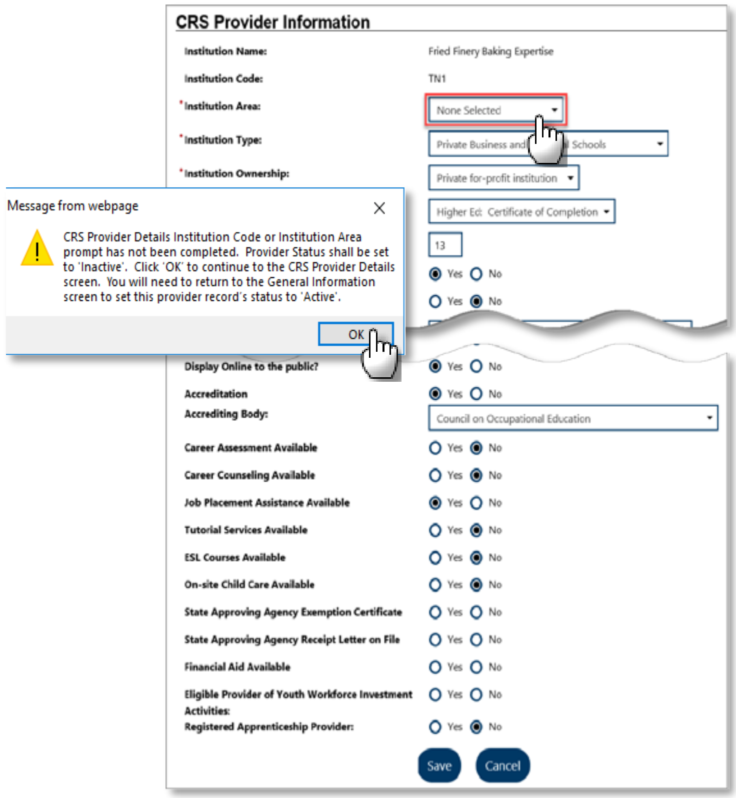
The popup message below will indicate this, and direct you to the CRS screen. Other changes will be saved, but the "Activate" cannot be saved until after you enter CRS data. Follow the steps below, and then return to step 5 to activate the provider.

8 If a pop-up indicates required CRS Details, click **OK** to open the CRS Provider Information screen (as shown on the next page).

9 Enter the required CRS entries, including Institution Code and Institution Type.

10 Click **Save** to save changes and return to the General tab for the provider.

11 Click the Edit Profile Details link (i.e., return to step 5) to activate the provider.



Required CRS Data before Provider can be Activated

Enabling a Provider User's Access

The basic 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.

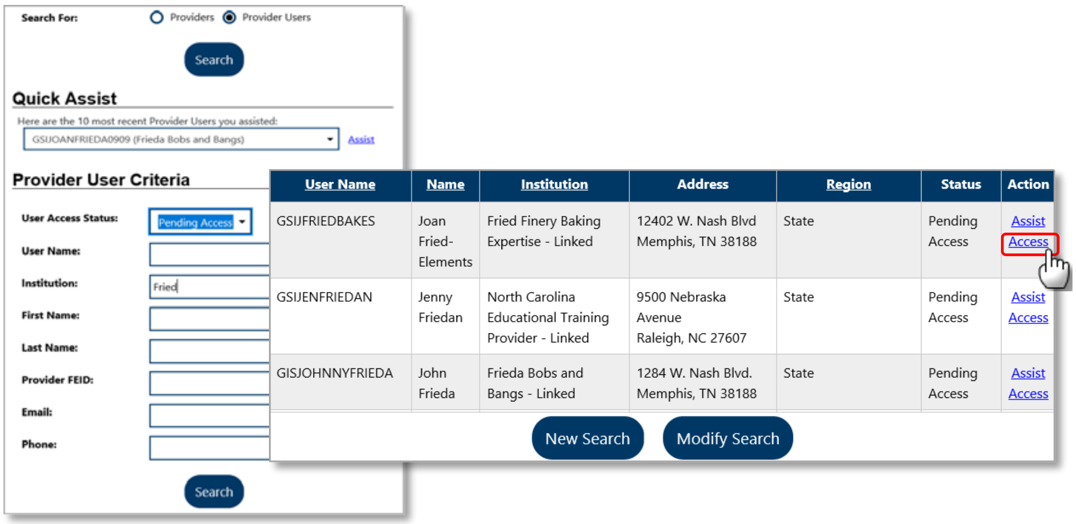
   For example, select Access Status of *Pending Access* and enter a partial Institution name (as shown in the following figure).

   Note: *New registrants who are pending access will display as "Out-of-State providers" unless 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.

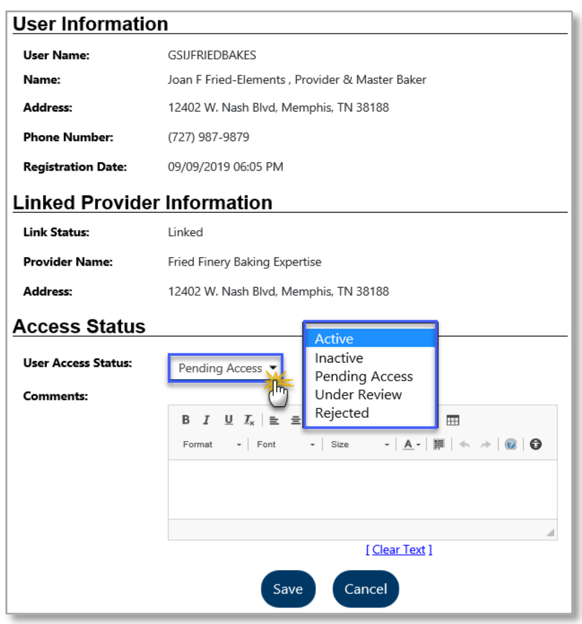
Note: *Staff can search for Provider Users by access status, by institution name, or other criteria, and click* Access *to change the access rights for a selected user.*



Search for Provider Users Pending Access

5 Click the **Access** 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 and Access Rights Options

7 Enter applicable comments.

8 Click the **Save** button.

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

Note: *From the displayed Access Rights area, (shown above) 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 free-form 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 may look like, for a newly registered provider user, 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 in a *Pending Access*, *Under Review*, or *Inactive* status).

Ellis Flink

FROM: POSTMASTER
CREATED BY: POSTMASTER
SENT: Monday, November 13, 2019 9:38:00 AM

TO: Ellis Flink
SUBJECT: Provider User Registration Notification
California Workforce Services Network has registered the new providers listed below.
New Provider(s)

User	Institution	New Institution	Date Registered
13079 GSI Samual 234 Capitol Street Salinas, CA 93901 (888) 111-2222 cmahan@geosolinc.com	GSI Tech Training	Yes	11/11/2016
3065 Ransom Smith 777 S. Figueroa St. Los Angeles, CA 90017 (213) 555-4545 ext 123 fxsmith@consoles.com	ConSoles Systems Inc.	No	05/11/2012
3064 Felix Jones 777 S. Figueroa St. Los Angeles, CA 90017 (213) 555-1212 ext 69 fxjones@bfservices.com	BF Services Inc.	No	05/11/2012

Staff needs to set up provider access and give appropriate privilege settings.

Auto-Notification Email for Recently Registered Provider Users

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8: Staff User: Assist a Provider – Managing Programs

Chapter Contents

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 staff who is creating a new program for a provider, editing a program, or reviewing a program to change its status (i.e., 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 (or E&T tab). This is a tab under the Provider Programs folder in a provider's portfolio.

The Education & Training Programs tab displays all 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 re-approval). The E&T 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).

▶ **To access the E&T Programs tab (assisting a Provider or Provider User):**

- Select **Manage Providers ▸ Assist a Provider** from the left menu.
- Select a **Search Mode** radio button: **Providers** or **Provider Users**.
- Enter search criteria and click the **Search** button.

From the **Provider** search results (institutions):

- Click a Programs link (in the Action column). This opens the **Provider Programs** folder.
- Select the **E&T Programs** tab. (The tab displays as indicated in the figure below.)

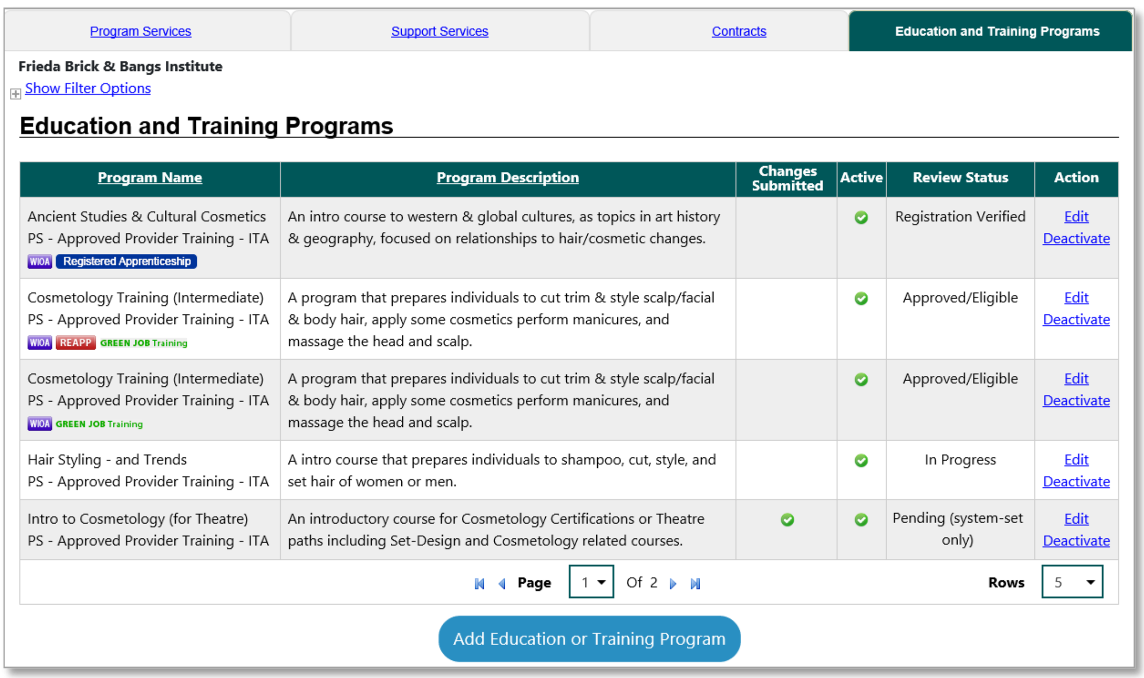
From the **Provider User** search results:

- Click an Assist link (in the Action column) for an active user. This opens the **Services for Providers** menu, associated with the user.
- Select the **Manage Institution Programs** option. (The **E&T Programs** tab displays as indicated in the figure below.)

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 Edit link to open each program for changes (via a multi-tab E&T 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.



Program Services | Support Services | Contracts | Education and Training Programs

Frieda Brick & Bangs Institute

Show Filter Options

Education and Training Programs

Program Name	Program Description	Changes Submitted	Active	Review Status	Action
Ancient Studies & Cultural Cosmetics PS - Approved Provider Training - ITA WIOA Registered Apprenticeship	An intro course to western & global cultures, as topics in art history & geography, focused on relationships to hair/cosmetic changes.		✔	Registration Verified	Edit Deactivate
Cosmetology Training (Intermediate) PS - Approved Provider Training - ITA WIOA REAPP GREEN JOB Training	A program that prepares individuals to cut trim & style scalp/facial & body hair, apply some cosmetics perform manicures, and massage the head and scalp.		✔	Approved/Eligible	Edit Deactivate
Cosmetology Training (Intermediate) PS - Approved Provider Training - ITA WIOA GREEN JOB Training	A program that prepares individuals to cut trim & style scalp/facial & body hair, apply some cosmetics perform manicures, and massage the head and scalp.		✔	Approved/Eligible	Edit Deactivate
Hair Styling - and Trends PS - Approved Provider Training - ITA	A intro course that prepares individuals to shampoo, cut, style, and set hair of women or men.		✔	In Progress	Edit Deactivate
Intro to Cosmetology (for Theatre) PS - Approved Provider Training - ITA	An introductory course for Cosmetology Certifications or Theatre paths including Set-Design and Cosmetology related courses.	✔	✔	Pending (system-set only)	Edit Deactivate

Page 1 Of 2 Rows 5

Add Education or Training 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 Information tab in the program creation wizard).
- **Changes Submitted** – Indicating if changes have been submitted since the last review/approval.
- **Active** – Indicating if this is currently listed as an active program.
- **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 listed programs) 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 (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 table. This includes topics that range from the *General Information Tab* on page 8-5, to the *Confirmation Tab* on page 8-26.

   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.*

3. 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 ***No***. If you click ***Yes***, the prompt "*This Education Program is a Registered Apprenticeship*," displays. If this response is ***No*** to either prompt, you can simply click, **Next**. If you pick ***Yes*** 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 **Next** 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: *Course Time* lets you define hours in class time, lab time, other time, and frequency. *Reporting Info* requires you to identify the program format (in-person, on-line, hybrid) and the total program length (in hours and in weeks). Reporting Info is required for WIOA reporting.
Duration Tab	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 *primary* duration is required when the site is configured to require duration.
Locations Tab	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.

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 *Yes,* if they want to proceed and submit the data in the previous tabs for WIOA approval (or re-approval).
- Select *No*, if they want to continue and simply save all data entered so far.

Note: *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 **Next**) 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 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.

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:

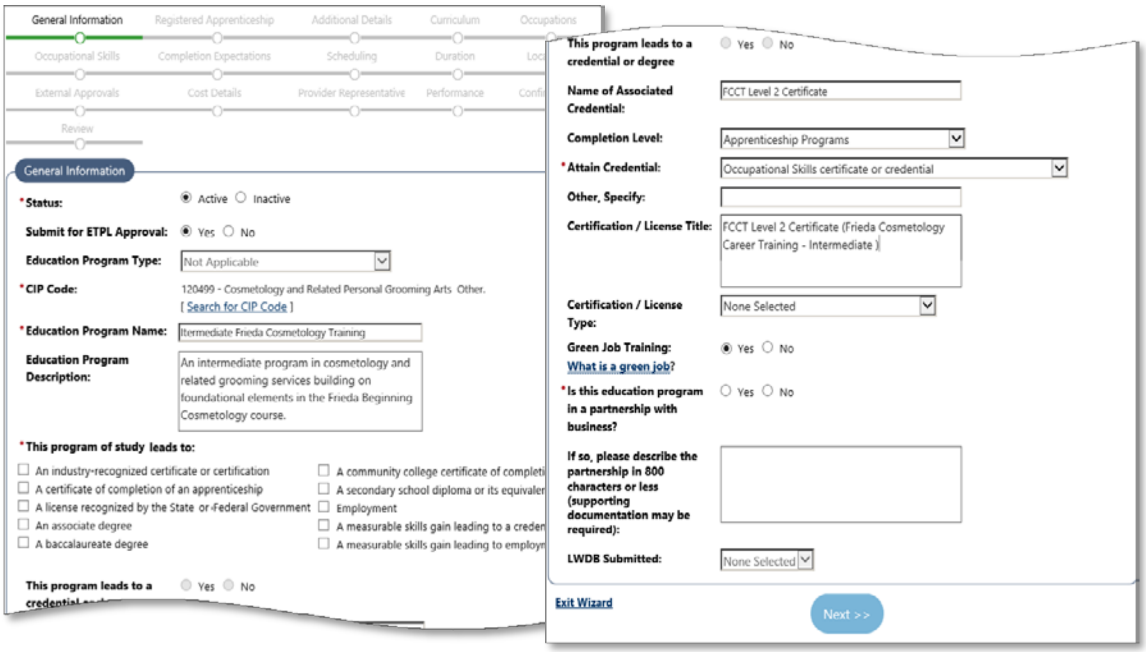
- Indicate *Active* or *Inactive* with the radio button. Only appropriate staff should determine when a program is marked *Active*.

- 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*.

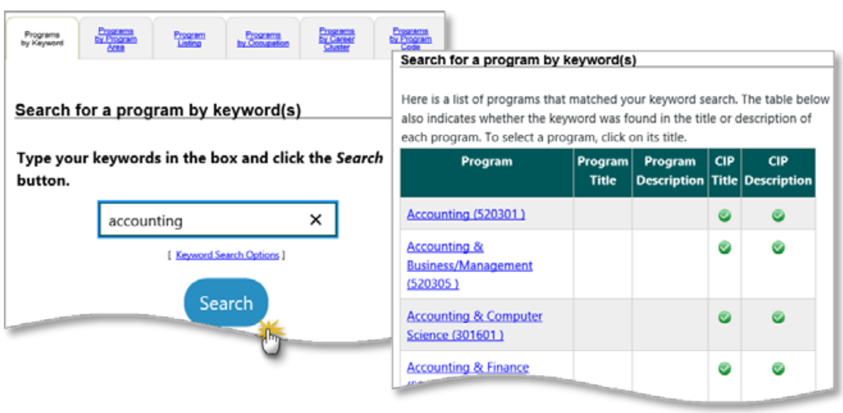
- Education Program Type must be selected. This field is required for staff and disabled for the provider user.



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 ⓘ, for more notes.)



Program, CIP Code Selection Tool

- 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.

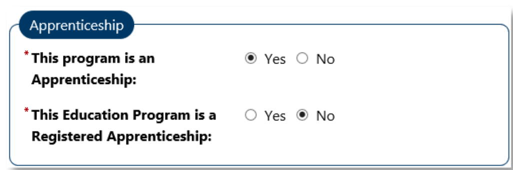
Note: *This first save from the General information tab creates a record for the program (that means if you log out and return, the record will display in your list of programs). Also, the Registered Apprenticeship tab and subsequent tabs will display completed header information in an Education Program 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. (The default prompt is *No*.)

▶ **If the program is an apprenticeship:**



- Select the ***Yes*** radio button.

  This displays a second prompt, *This program is a Registered Apprenticeship*

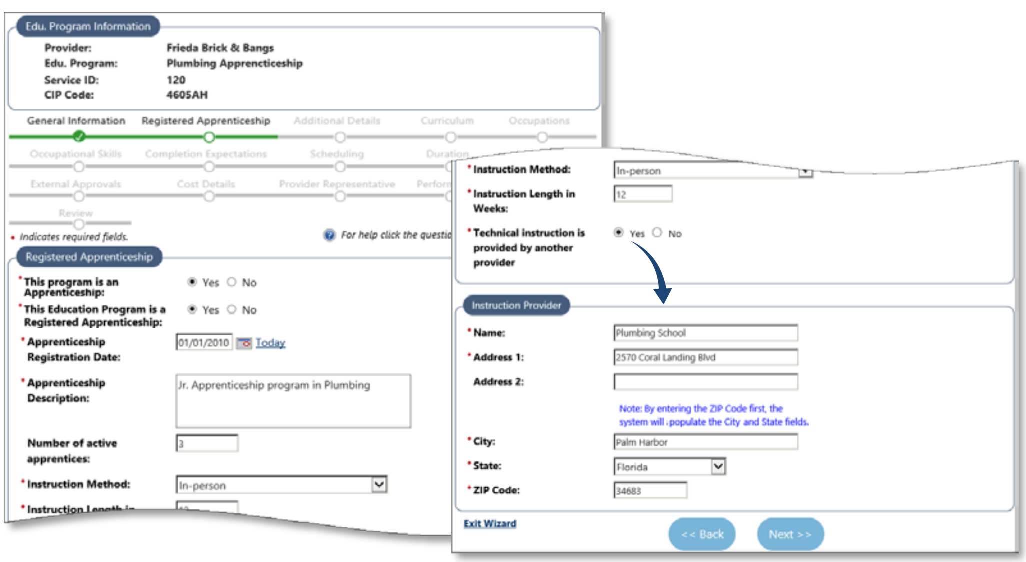
- If no, click the **Next>>** button.

  There is nothing else to do on this tab. The next tab will display – Additional Details.

▶ **If the program <u>is</u> a registered apprenticeship:**

- Select the ***Yes*** radio button.

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



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.*

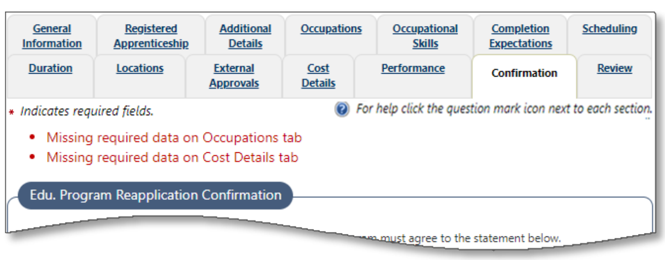
- When all data is complete, click the **Next>>** button.

If all required field entries are valid, the Additional Details tab will display. Most tabs will not require details for the Registered Apprenticeship. (See ⓘ, 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 indicated in the figure below.*



Confirmation Tab Messages

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

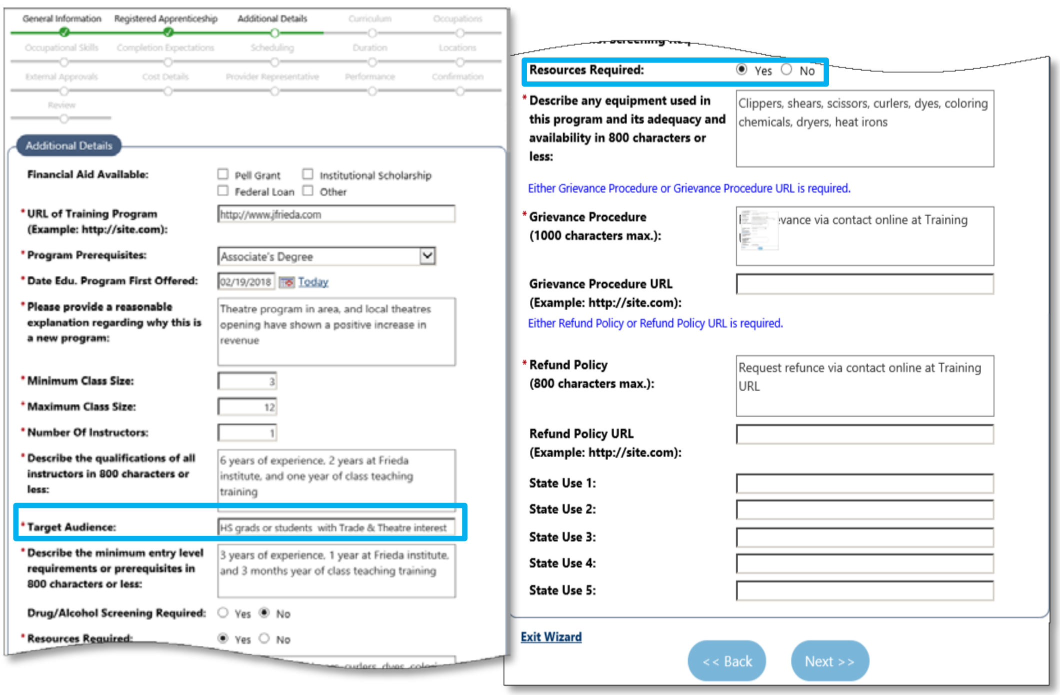
- *The check box for "*A certificate of completion of an apprenticeship.*"*
  This may apply for a Registered Apprenticeship program.
- *The question "*Is this education program in a partnership with a business?*"*
  *If this apprenticeship is through a business, then the answer should be "*Yes,*" followed 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. These are highlighted in the figure above.

- **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.

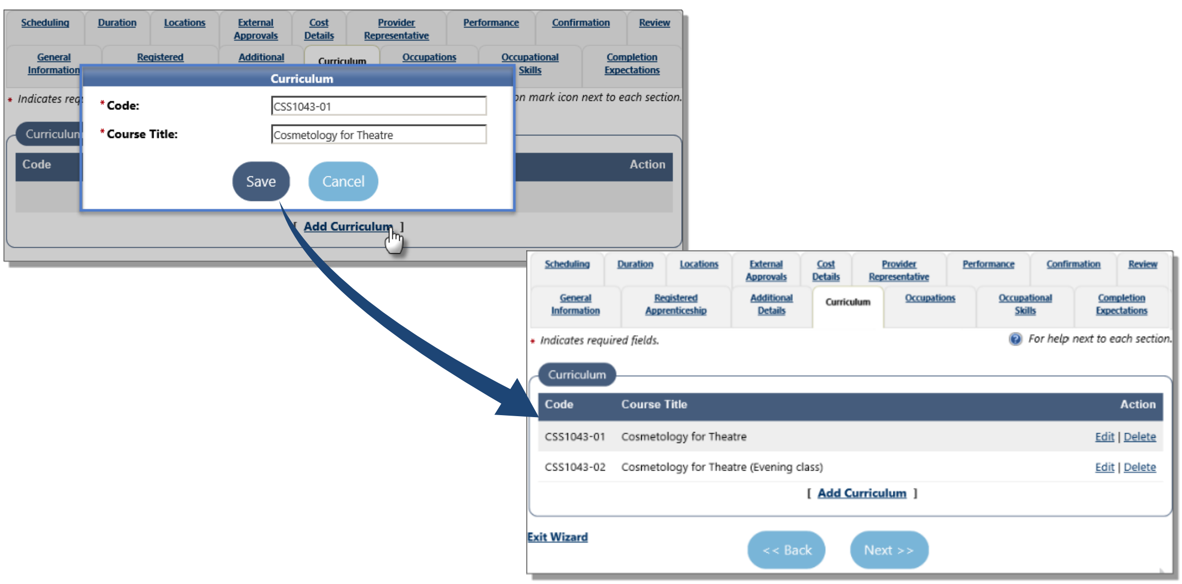
This tab may be configured to not display on the wizard, or to display with Curriculum not required, or to display with Curriculum as a required entry (that is necessary to complete the Confirmation and Review tabs).

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

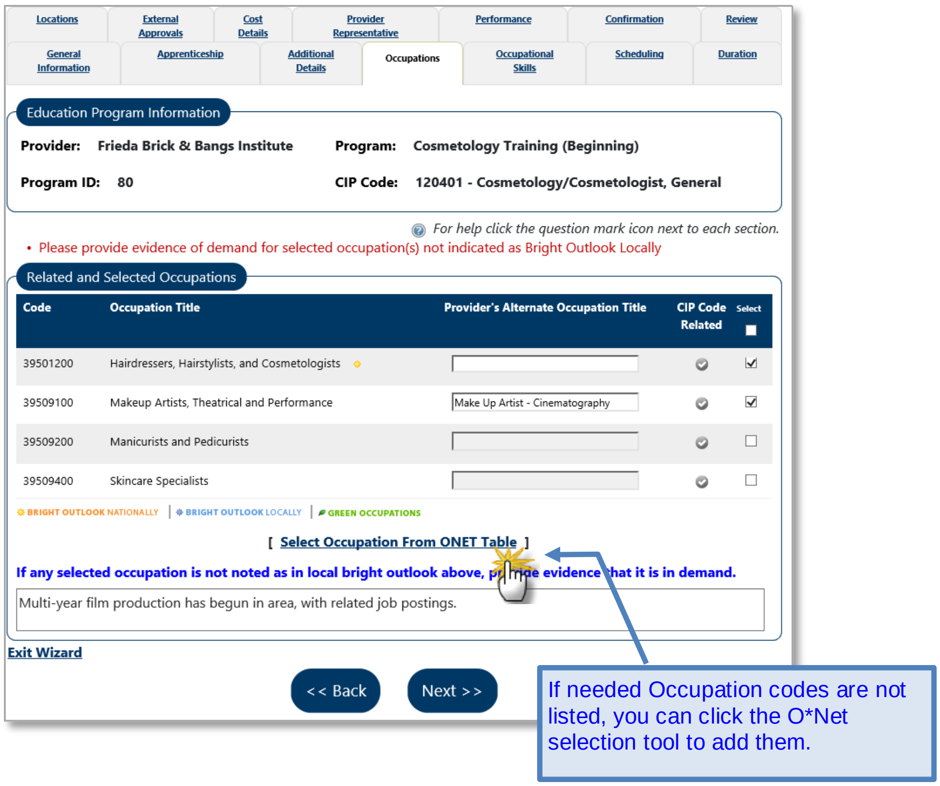
The Occupations tab lets the provider identify O*Net occupations that are associated with this program. This is done by selecting occupations from a list of related occupations. The Related Occupations list displays occupations related to the CIP code that was selected on the General Information tab 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.*

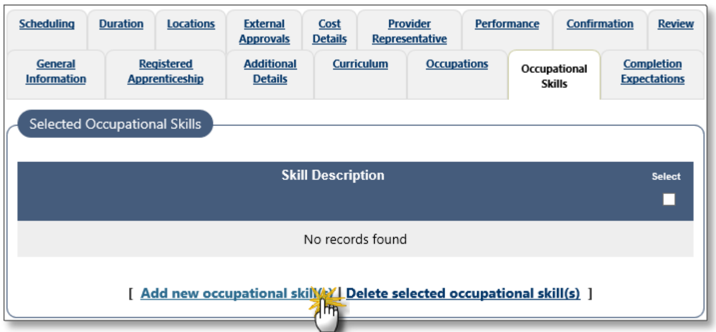
Search and Select Occupation Code *– The displayed list is from occupations, related by the CIP code in the General Information tab to this program. If other occupations apply, you can use the standard Occupation Search tool to select the Occupation (the link at the bottom of the list).*

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:

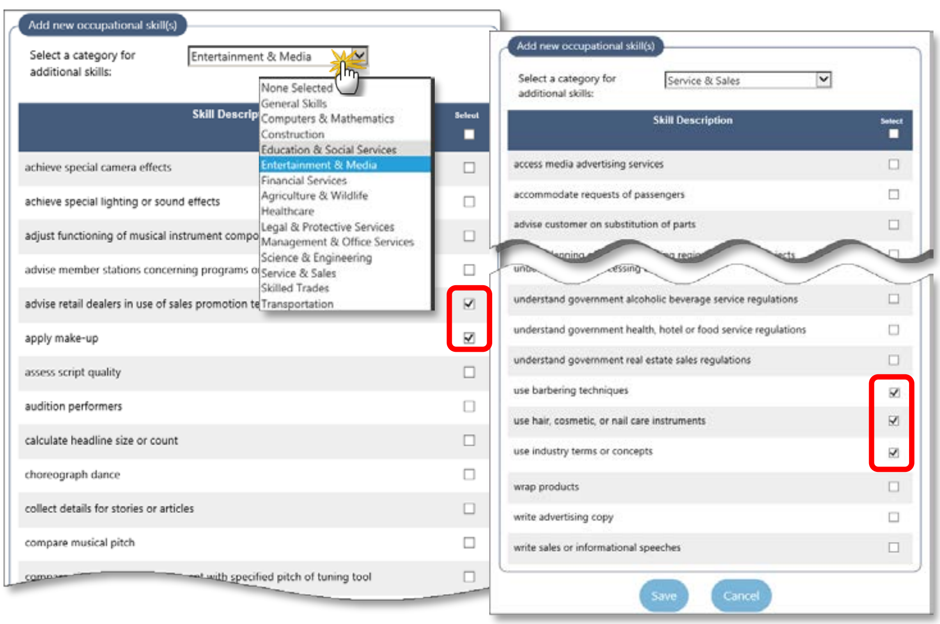
- Click the Add new occupation program skills link.



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.

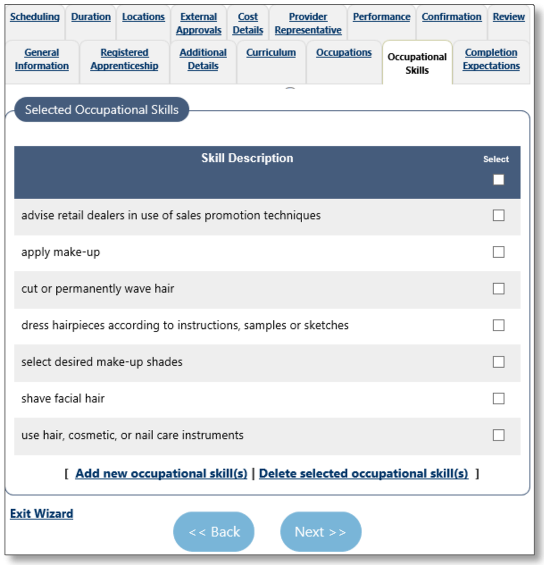
Note: *When you select other categories and check the appropriate boxes, the checked skills in each category stay in memory until you click* **Save** *or* **Cancel***.*



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.

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).

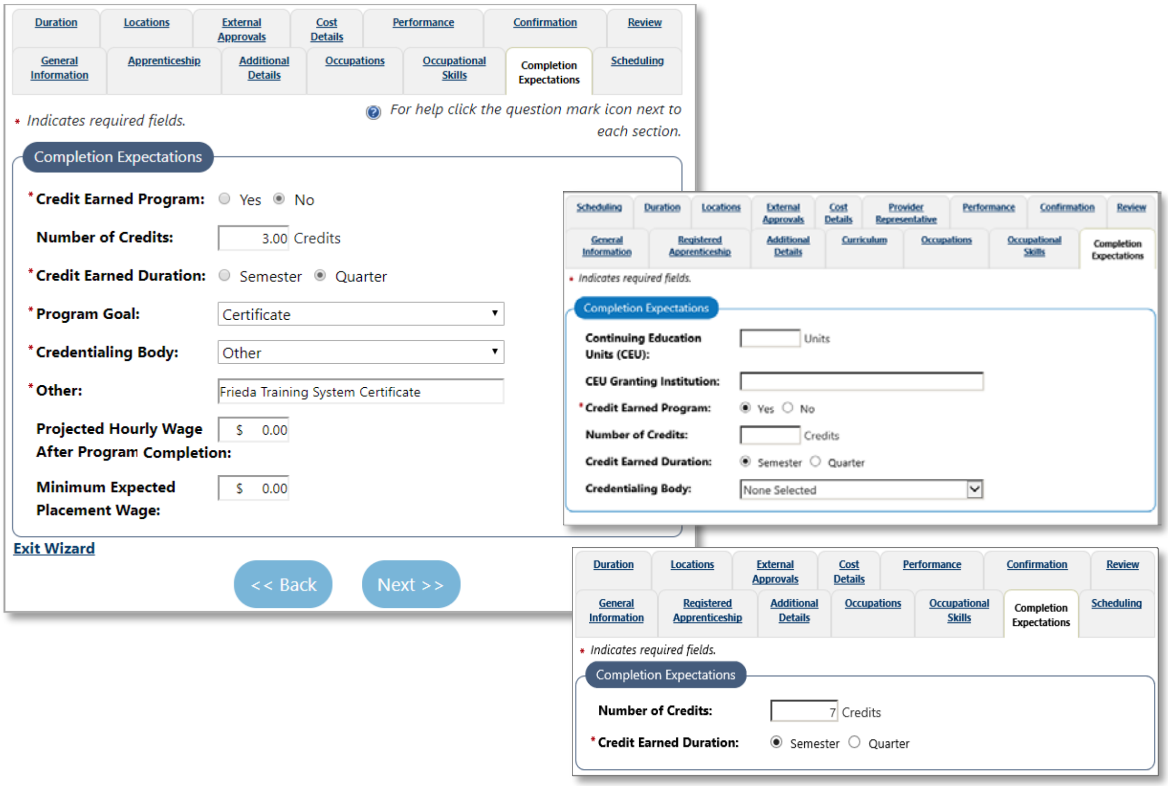
This tab and many fields on it are configurable (it is turned off for some sites). If all fields are Off*, the tab will not display. The listed fields, below are for the first of the three sample screens (displayed in the figure).*

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 drop-down.

    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:

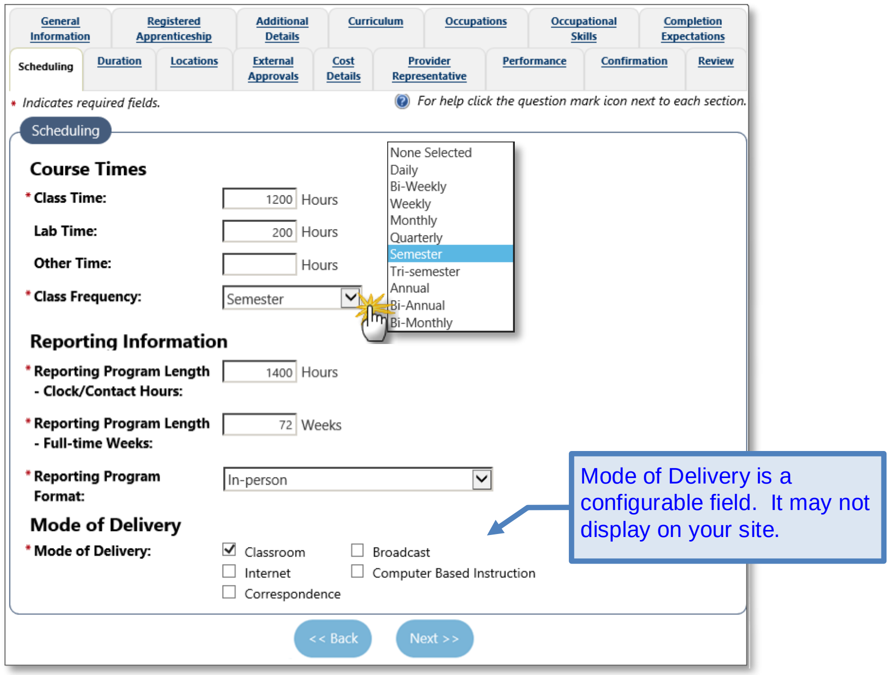
- Enter the appropriate information for each displayed field:

  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.

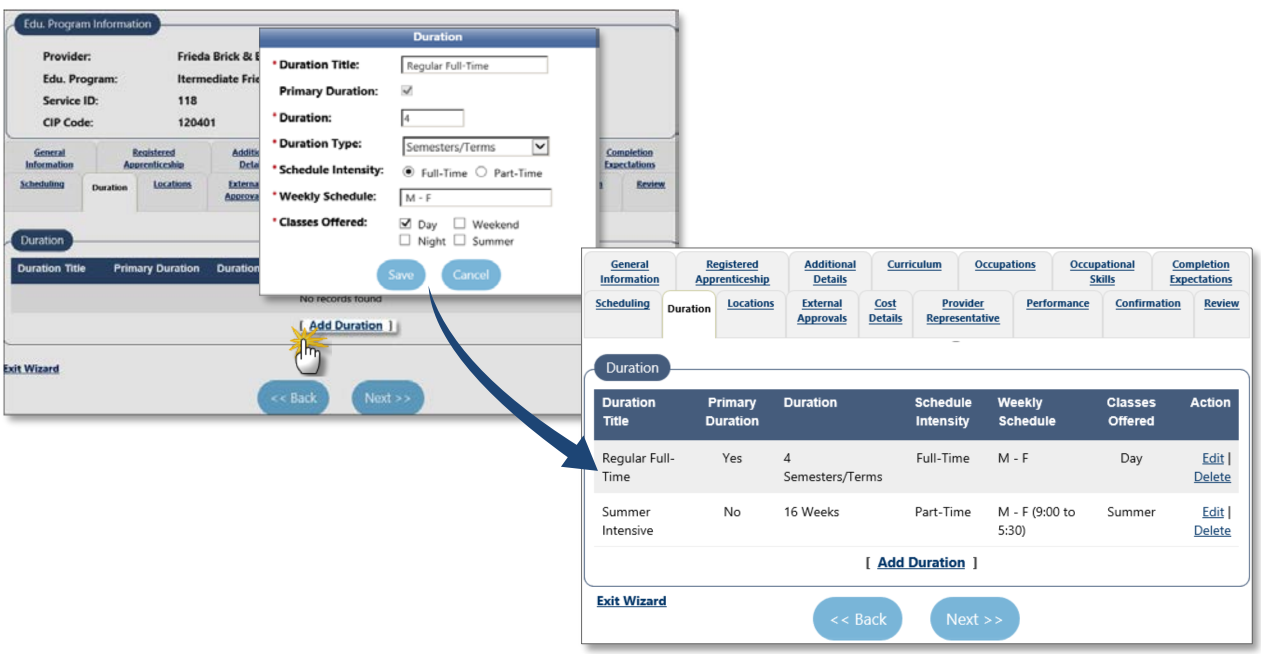
Duration Tab

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)

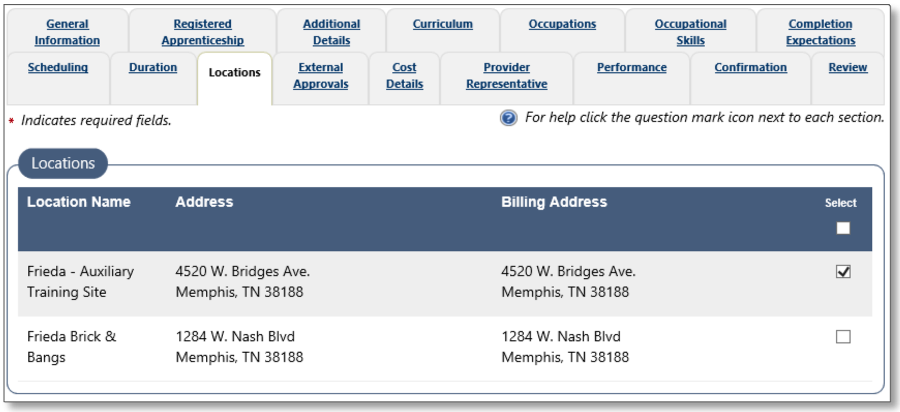
- Repeat the steps for other Duration records as necessary.
- When all data is entered, click the click **Next>>** button.

  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.

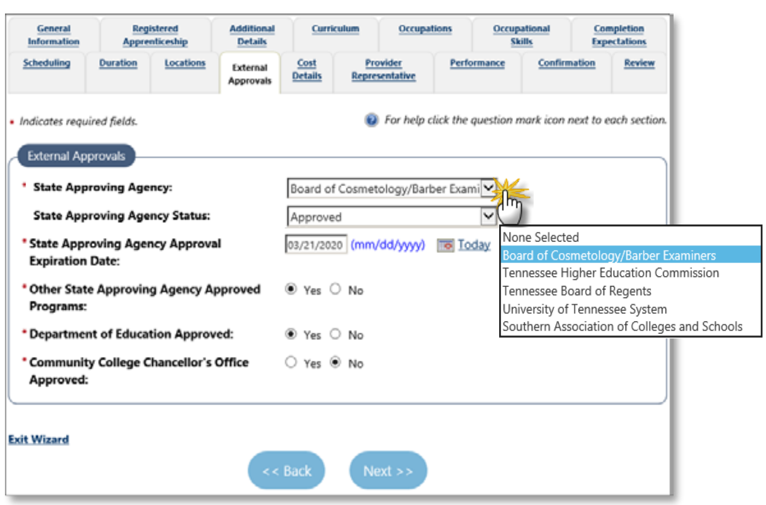
  The External Approvals tab will display.

  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 configured to be 'Off', the tab will not display on the wizard. The listed fields, below, are for a sample configuration. Statuses or Dates may be configured for different Approved fields on this tab.



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

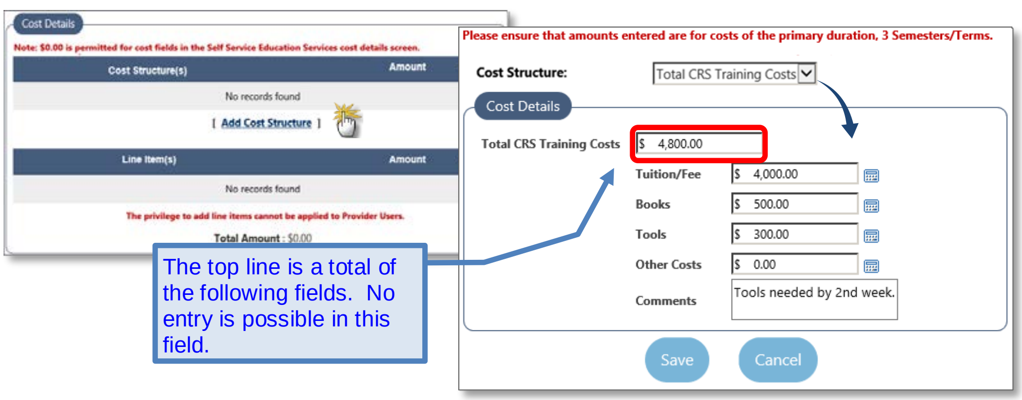
Cost details are required for a standard program submitted for ETPL approval. The Cost Details tab is used to indicate detailed costs of the program, through a standard cost structure for the total training costs (which include Tuition/Fees, Books, Tools, and Other Costs).

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).

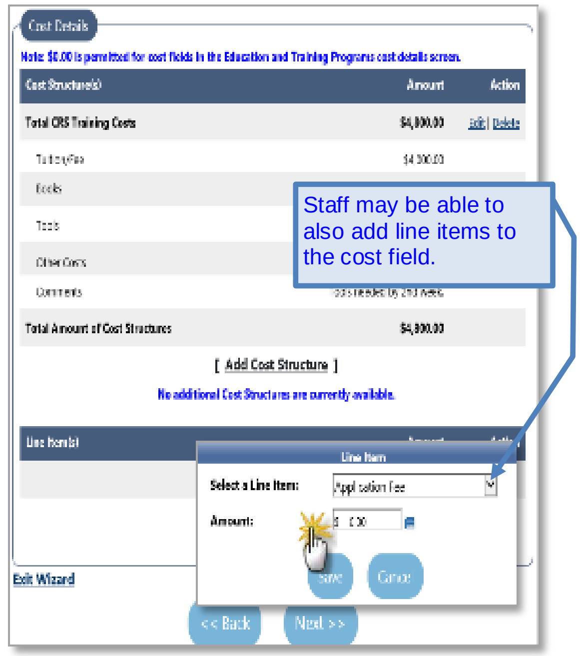
  This displays fields in the Cost Details area (as shown below).



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 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 Add Line Item 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.

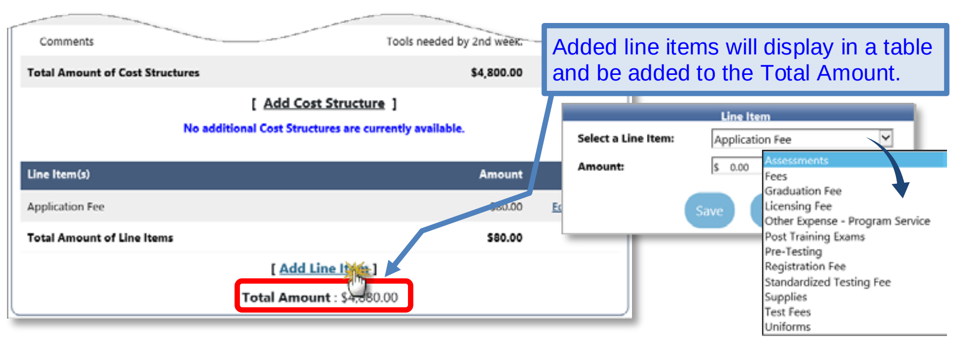
ⓘ More Notes – Cost Details Tab

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 Add Line Item 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.

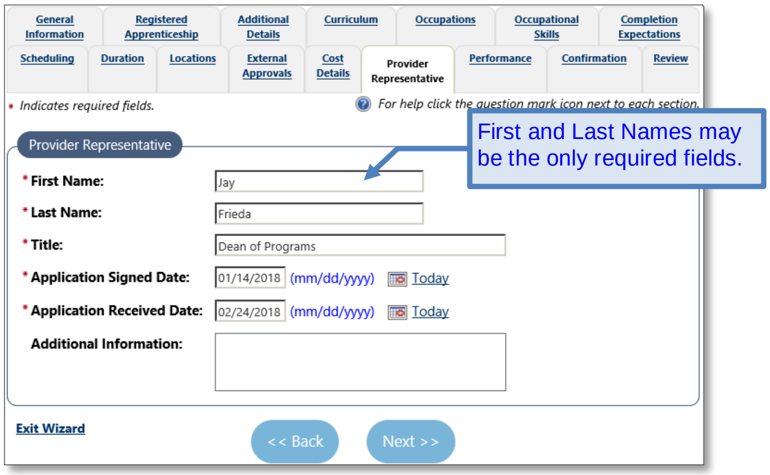


Adding Cost Details (via a Cost Structure)

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.*

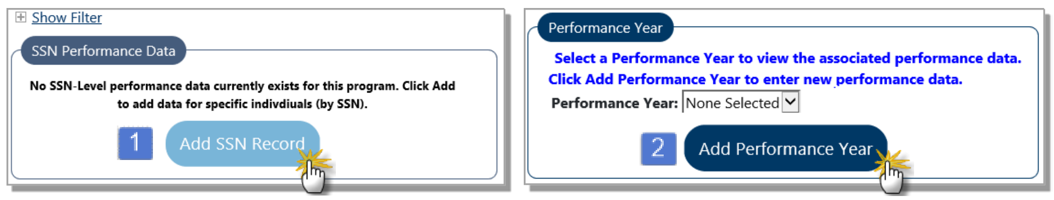
- When all data is entered, click the **Next>>** button.

  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.

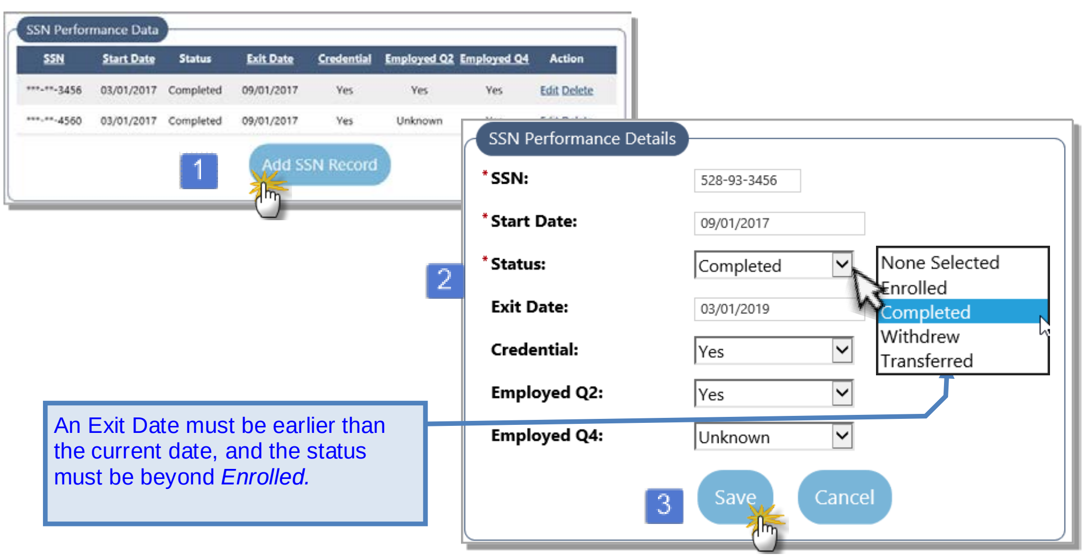
SSN Performance Data (Adding Data per Enrolled Individual)

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.
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-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

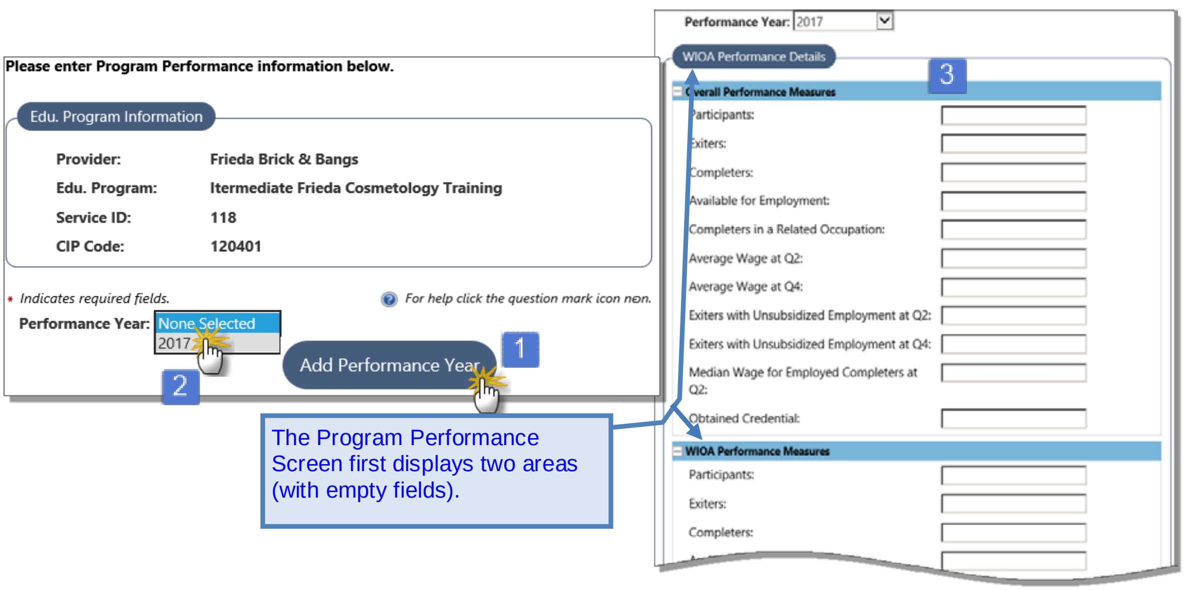
To add a performance year (and start entering details for the year):

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).



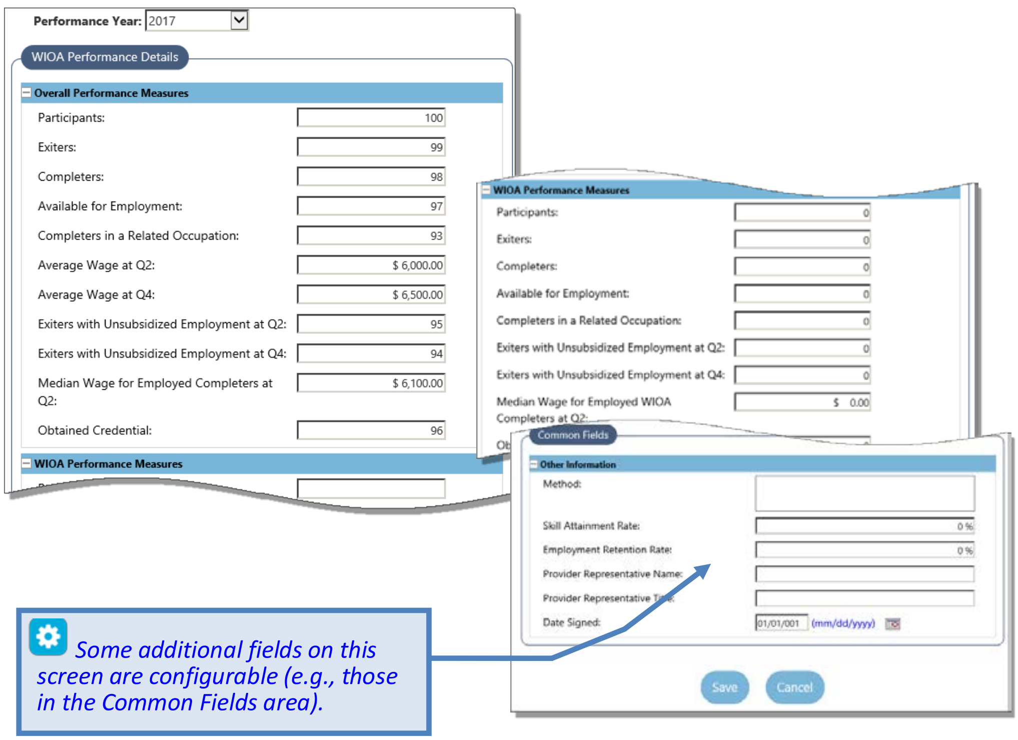
Opening a Program Performance Screen for Aggregate Data Entry for a Specific Year

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.*

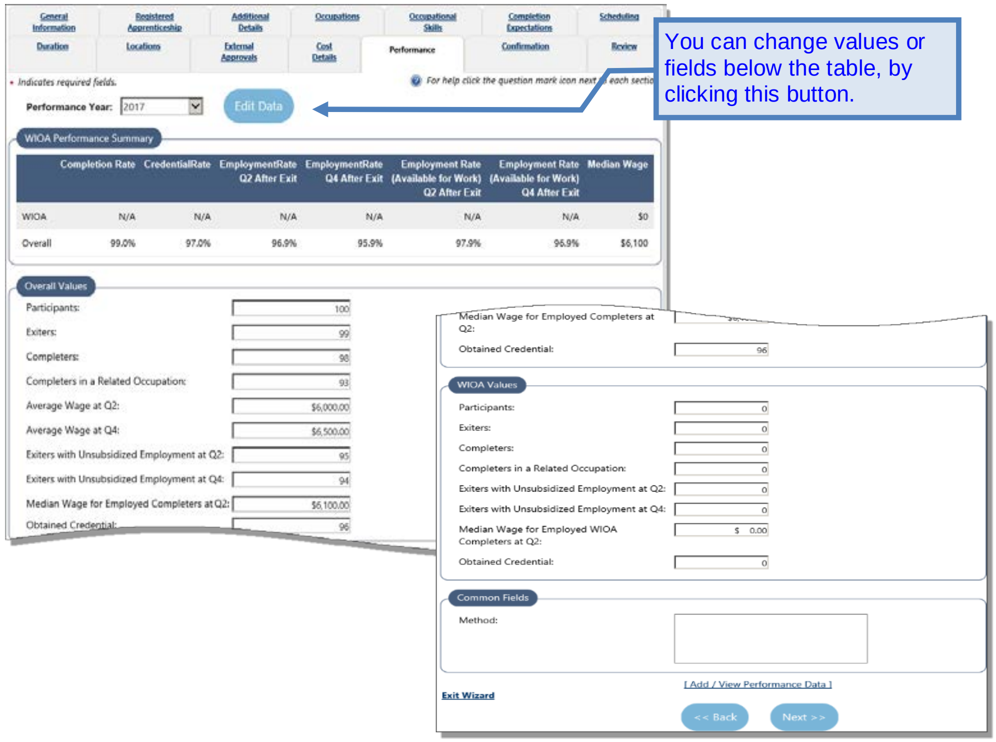
Keep in mind that performance data is not required but is critical to reliable WIOA certification. It must be verified by staff to be accurate. Therefore, sites are often configured to limit the entry to staff, and only allow provider users the ability to view the completion, employment, and performance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

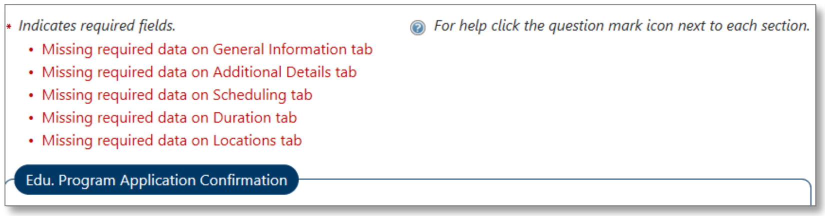
Entering the Overall and WIOA Values: *Performance data is not required but is critical to reliable WIOA certification. It must be verified by staff to be accurate. Therefore, sites are often configured to limit the entry to staff, and only allow provider users the ability to view the completion, employment,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

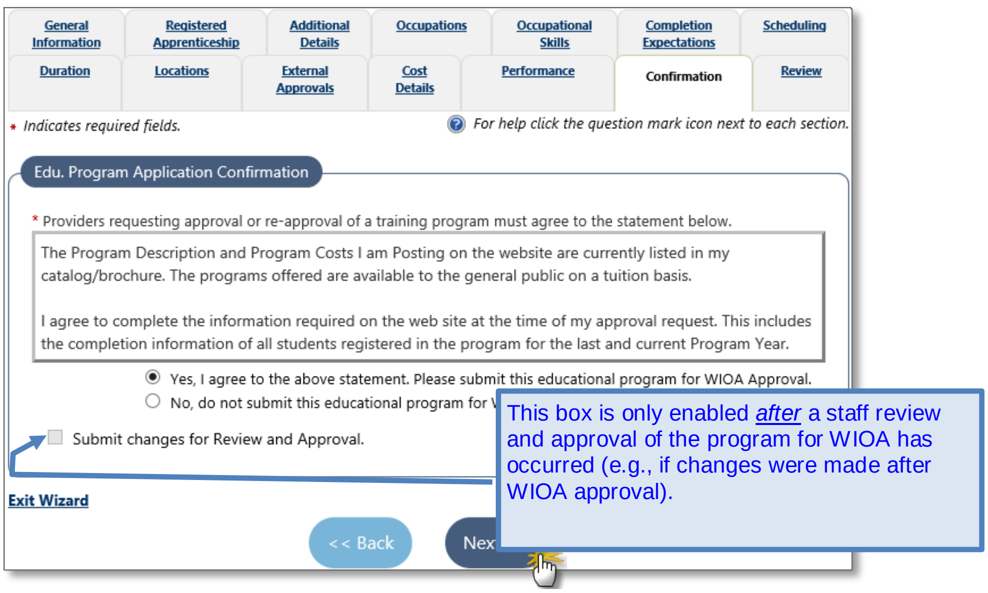
This section contains a simple confirmation statement that must be read by a provider user before they submit the program for approval. If staff manage and submit the programs for the provider, they will have to select the *Yes* radio button (i.e., agree with the statement) to submit the program for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

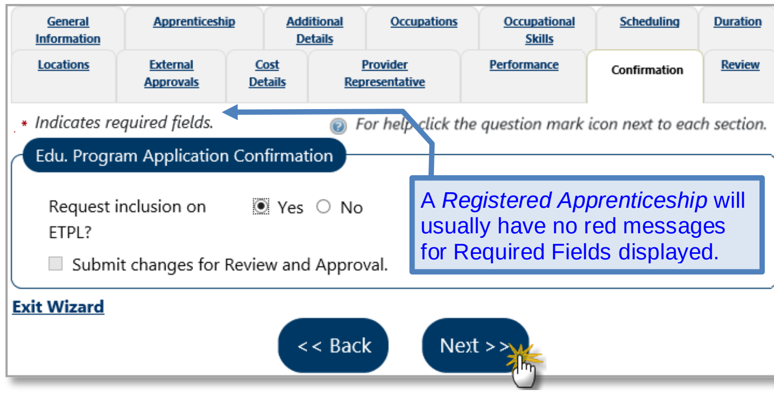
Confirmation Tab – for Registered Apprenticeship Approval

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).

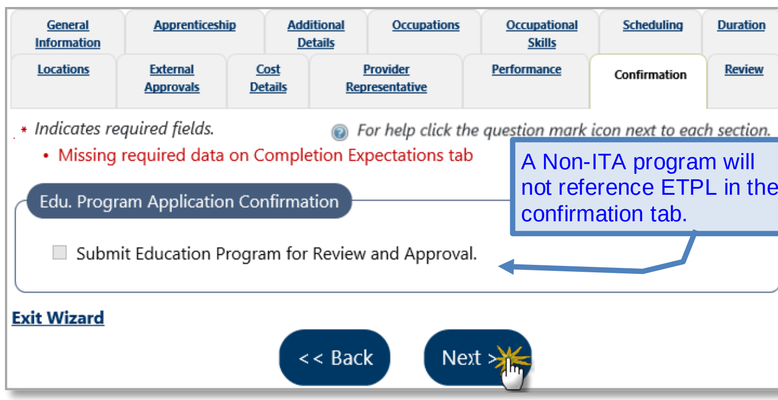


Confirmation Tab for Registered Apprenticeship Program

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.



Confirmation Tab for Non-ITA Education Program

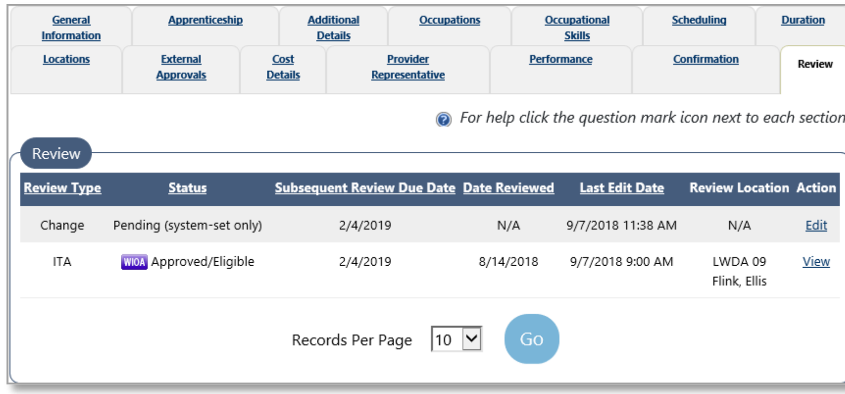
To confirm and submit an a non-ITA program for staff review:

- 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.

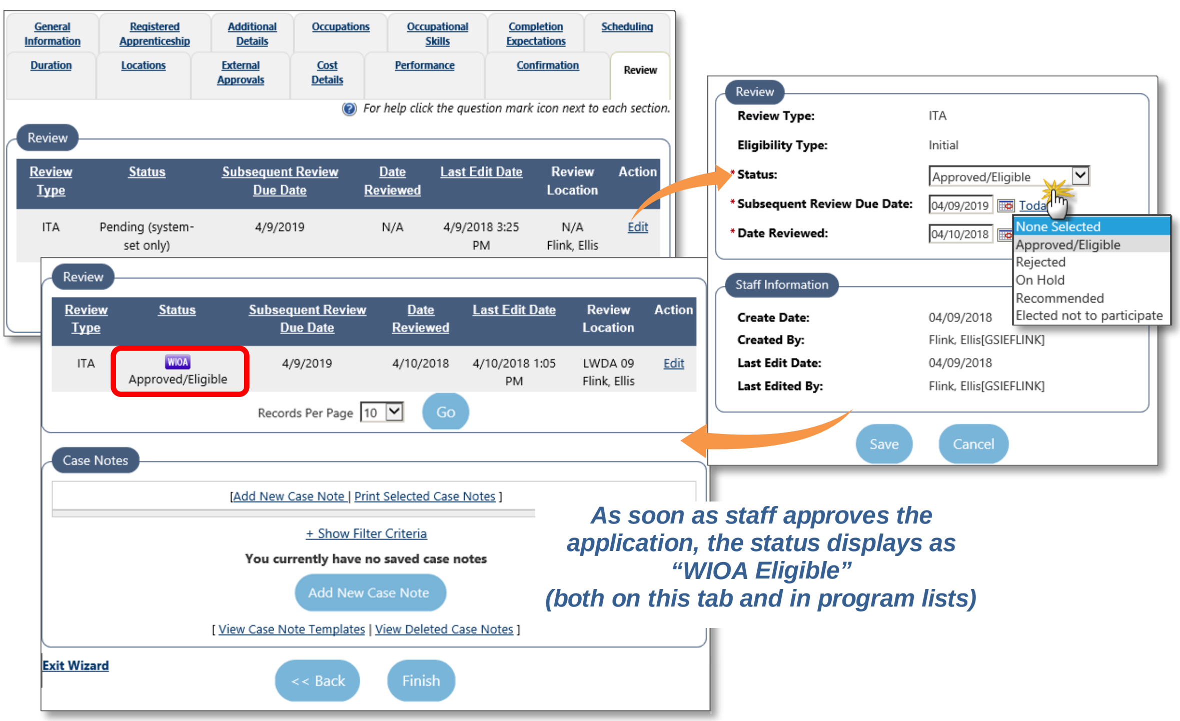


Review Tab (with Change Submitted, Pending Review & Approval)

On this tab, staff can see a table of records for each submitted approval, or change. They can use a View or Edit link (displayed for each review type) for a submitted review. Using the Edit 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.

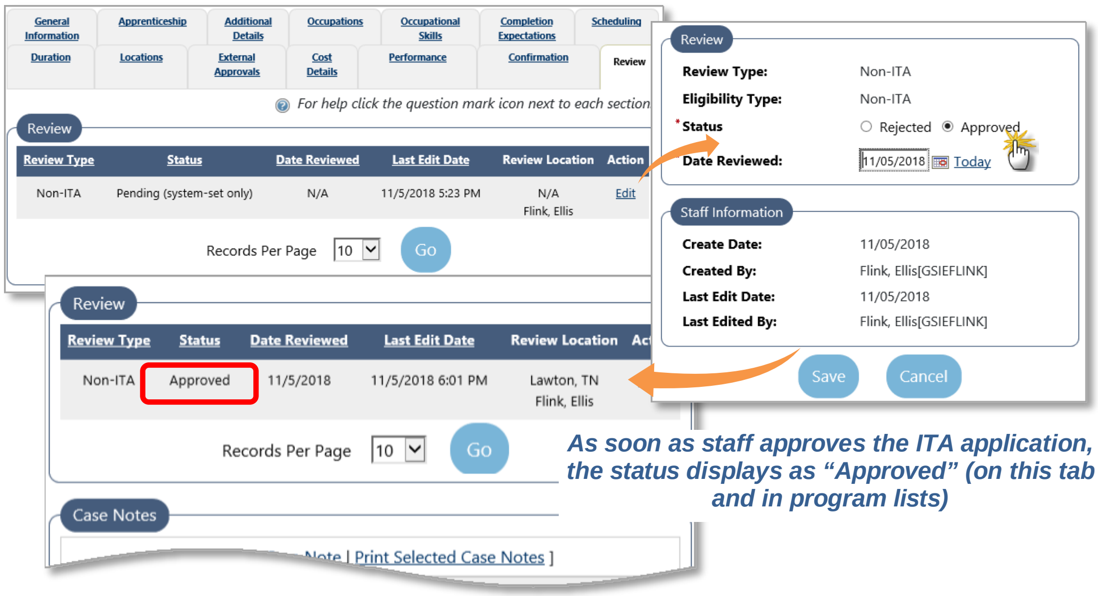


Review Tab (sample of First Submission for WIOA approval)

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.

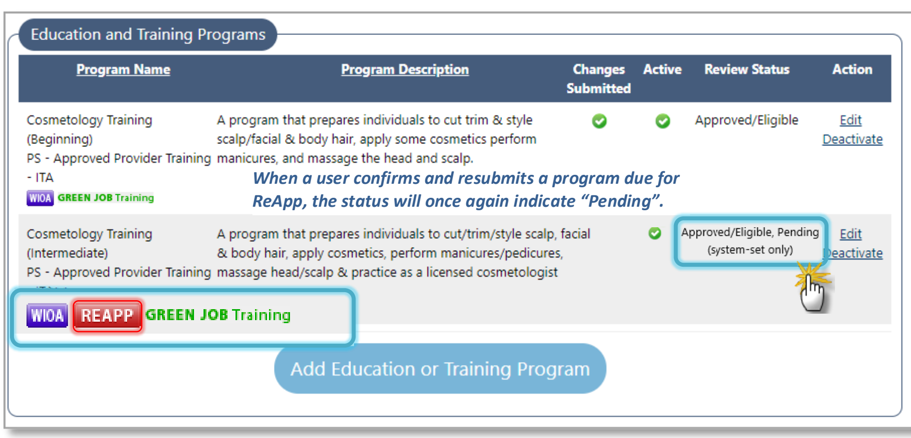


Review Tab (sample of First Submission for WIOA approval)

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 Edit link from the action column.

  The wizard opens to the General Information tab.

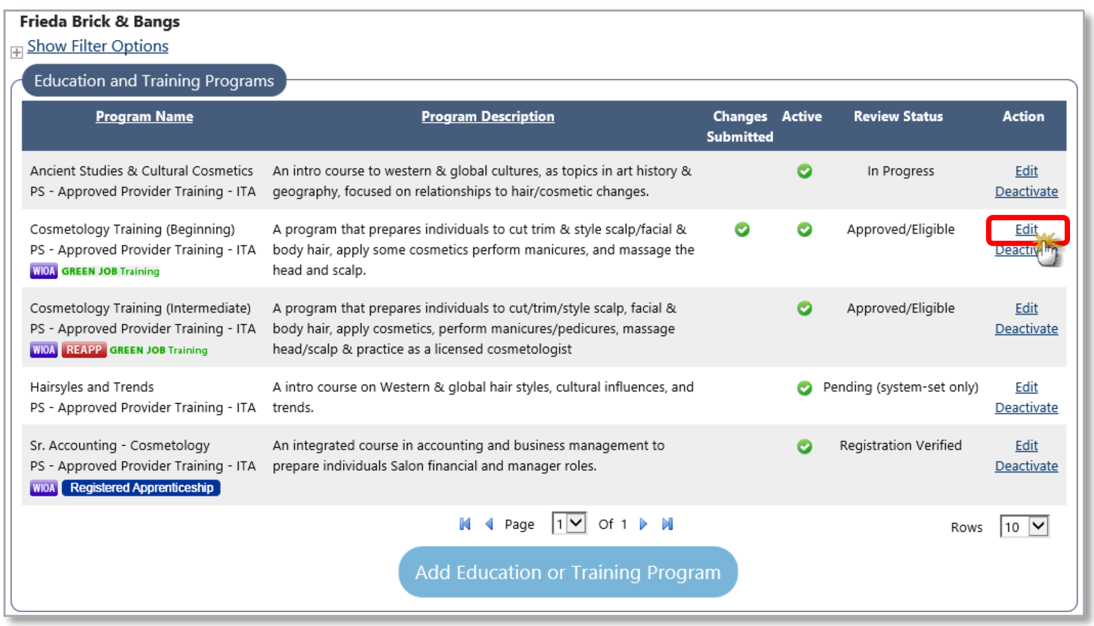
  Select the Review tab.
- Follow the same steps in the previous topic to approve the program.

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 *Edit* link for a program from the Action column (as shown in the figure below), it opens the General Information tab, using the same Program wizard and the related tabs that were first displayed in adding the program. 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.



Program Name	Program Description	Changes Submitted	Active	Review Status	Action
Ancient Studies & Cultural Cosmetics PS - Approved Provider Training - ITA	An intro course to western & global cultures, as topics in art history & geography, focused on relationships to hair/cosmetic changes.		✓	In Progress	Edit Deactivate
Cosmetology Training (Beginning) PS - Approved Provider Training - ITA WIOA GREEN JOB Training	A program that prepares individuals to cut trim & style scalp/facial & body hair, apply some cosmetics perform manicures, and massage the head and scalp.	✓	✓	Approved/Eligible	Edit Deactivate
Cosmetology Training (Intermediate) PS - Approved Provider Training - ITA WIOA REAPP GREEN JOB Training	A program that prepares individuals to cut/trim/style scalp, facial & body hair, apply cosmetics, perform manicures/pedicures, massage head/scalp & practice as a licensed cosmetologist		✓	Approved/Eligible	Edit Deactivate
Hairsyles and Trends PS - Approved Provider Training - ITA	A intro course on Western & global hair styles, cultural influences, and trends.		✓	Pending (system-set only)	Edit Deactivate
Sr. Accounting - Cosmetology PS - Approved Provider Training - ITA WIOA Registered Apprenticeship	An integrated course in accounting and business management to prepare individuals Salon financial and manager roles.		✓	Registration Verified	Edit Deactivate

Page 1 Of 1 Rows 10

The Education and Training Programs List (to edit programs)

▶ To Edit a Program:

- Click the Edit 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.

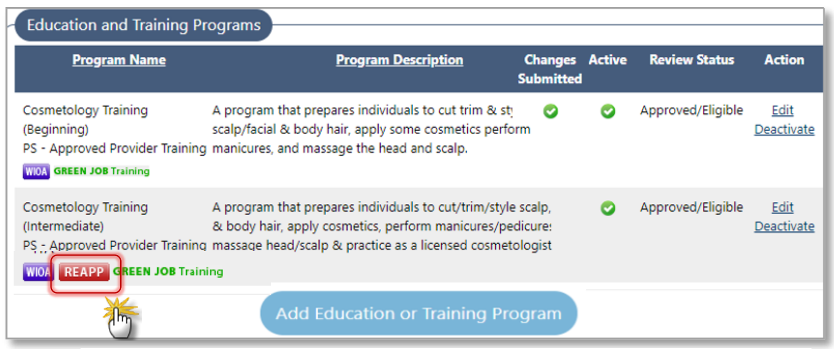
9: Managing Program Reapplication

Chapter Contents

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).

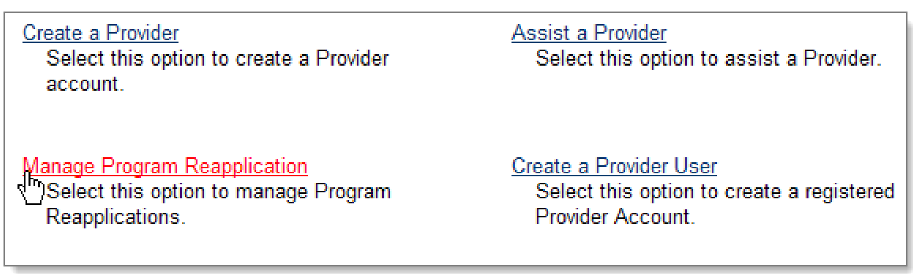
When the program nears the Subsequent Review Due date (e.g., is within 30 days) both provider users and staff see a WIOA icon and a REAPP icon.

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.



Sample Program Due for WIOA Reapplication (Provider User View)

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

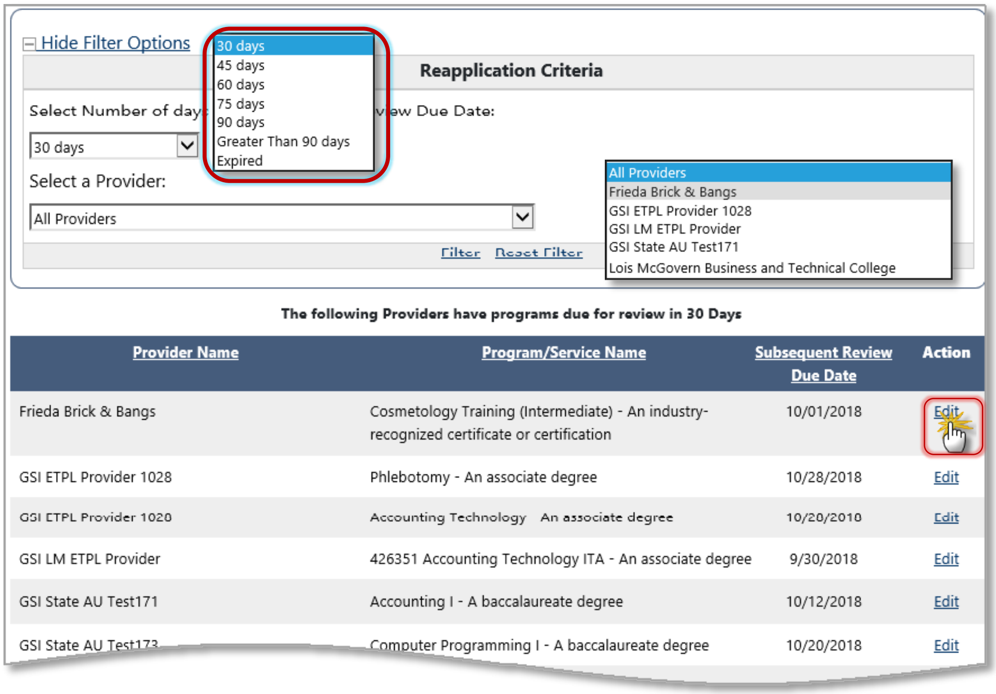
Staff can keep track of multiple providers that have programs due for reapplication by clicking the Manage Program Reapplication screen from the ***Services for Staff > Manage Providers*** menu.

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

- Select the **Manage Program Reapplication** option 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 Filter link to redisplay the list for the new defaults.

  The Manage Program Reapplication Screen redisplays.
- Click the Edit 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 *Expired* 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 Edit link in the *Action* column. The Edit 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).

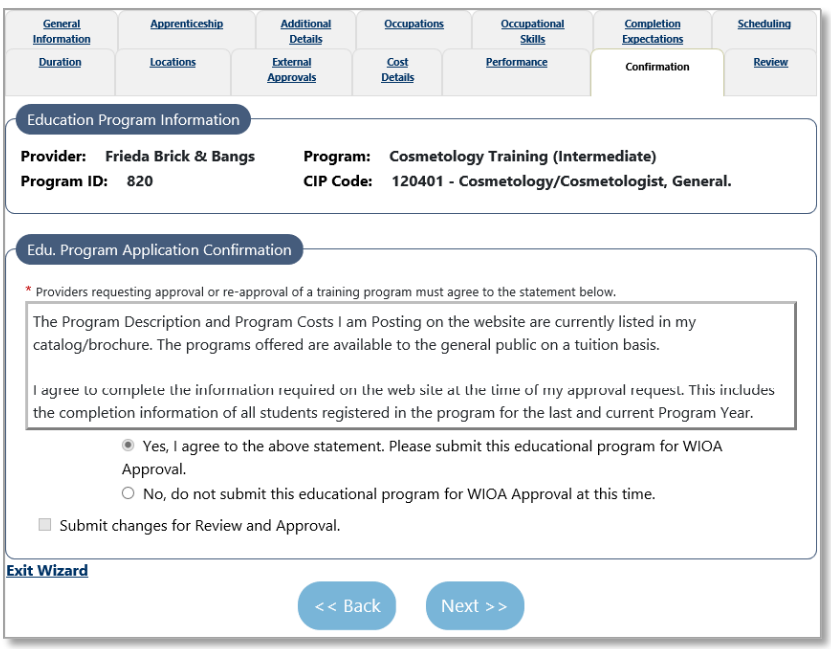
Filter Criteria for Program Reapplication Screen

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)

Chapter Contents

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

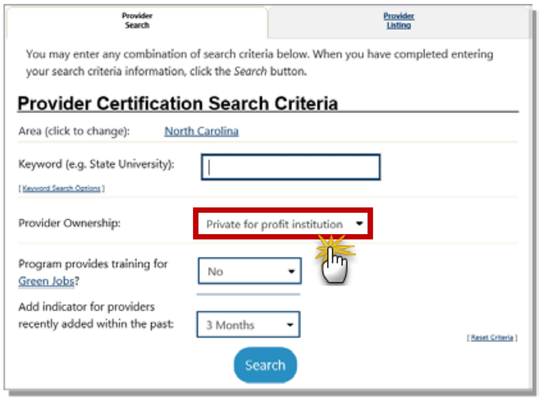
Staff (other than state staff) who have privileges for local certification can open a search screen to view available providers. From the list of displayed providers, they can select providers whose certification they want to change, and then switch the certification for those providers for their LWIA.

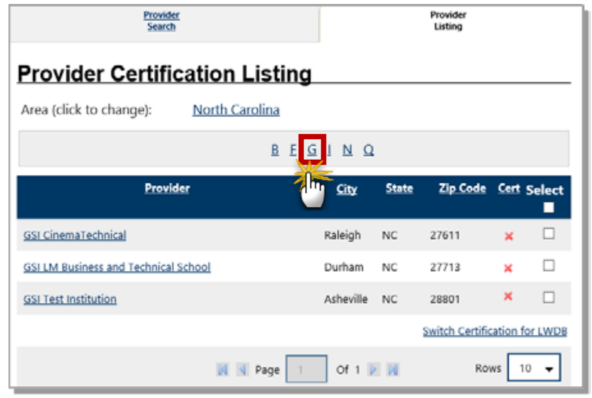
▶ **To Change a Provider's Certification:**

1. 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).





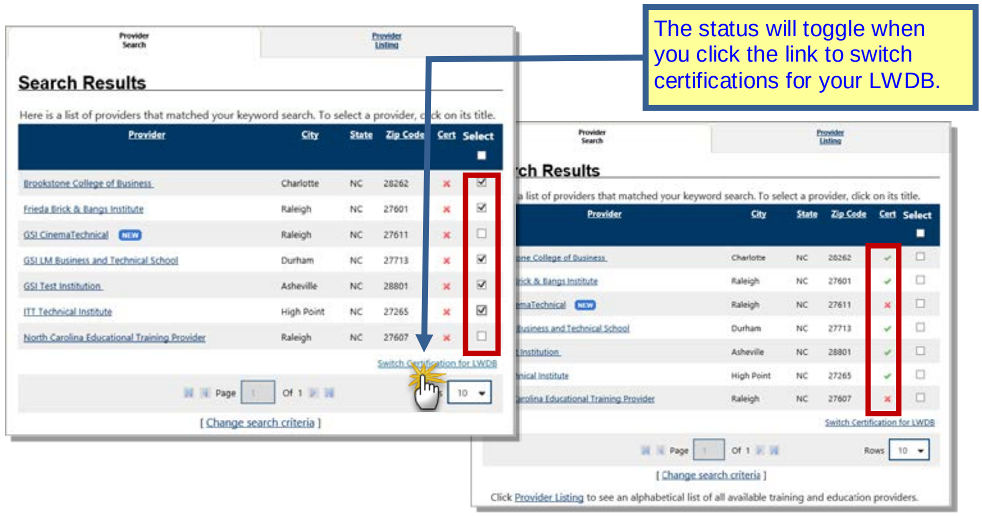
Example of the Two Provider Certification Tabs

- **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.

1 From the displayed provider listing, check boxes in the Select column for providers to be switched.

2 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

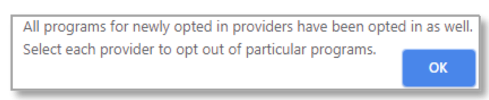
Important Notes for Provider Certification

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 Switch Certification for LWDB 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)

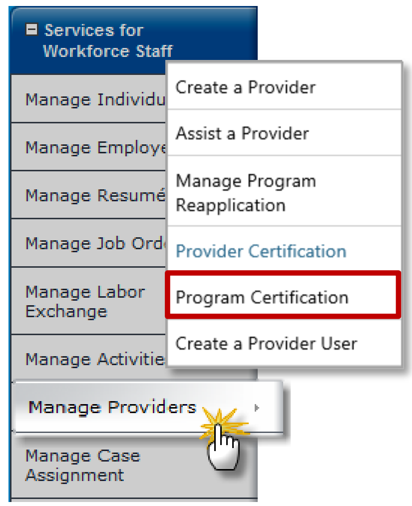
Chapter Contents

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 Managing Providers, 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.

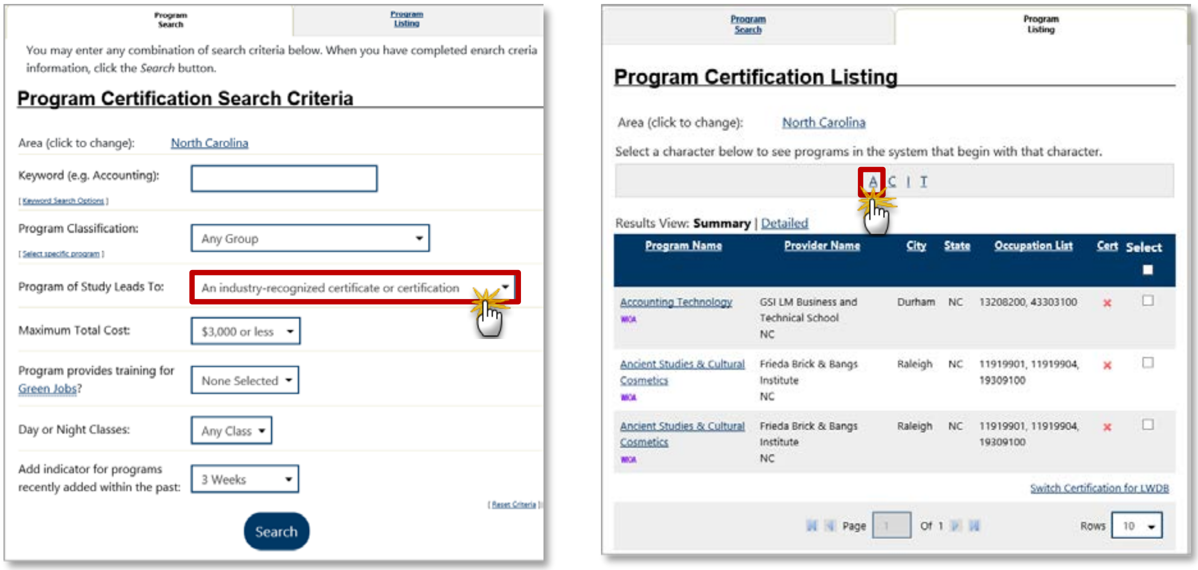
▶ **To Change a Program's Certification:**

1. 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).

   - **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.

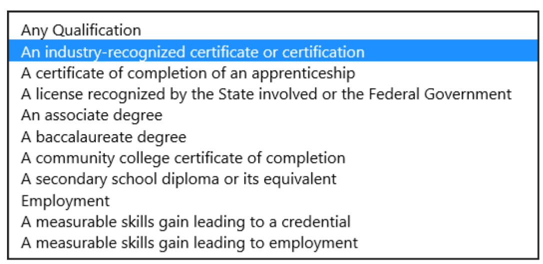


Example of the Two Program Certification Tabs

- **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 drop-down list the program codes.

Note: *There is also a Select program classification 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.



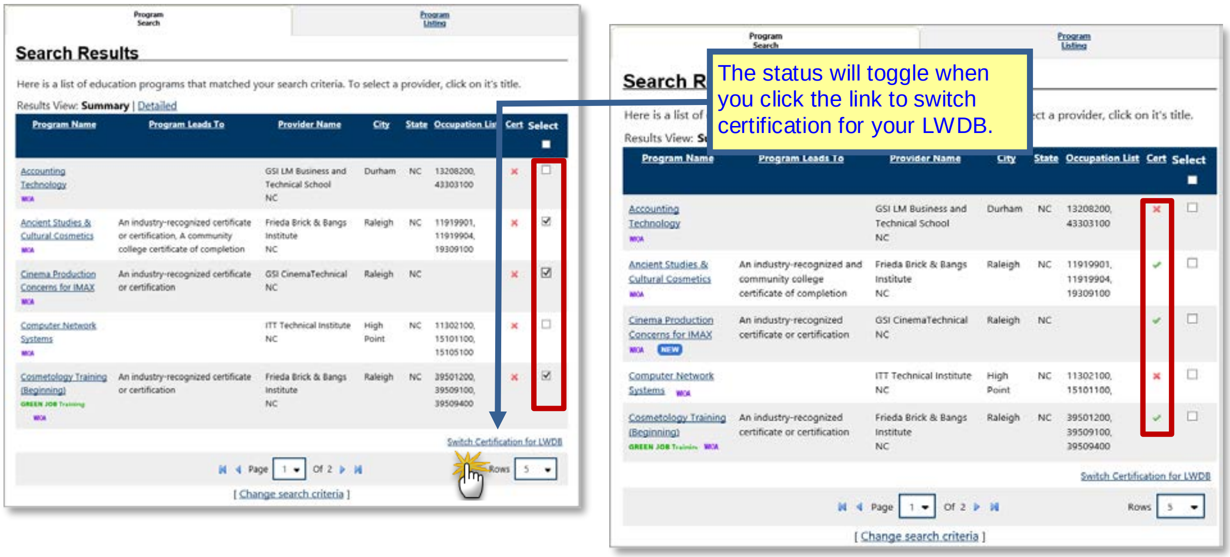
- **Maximum Total Cost:** A drop-down list lets you limit results to a maximum cost for the program.
- **Indicator for programs recently added within the past:** A drop-down list lets you limit results to an added program within a recent time frame – 1 week, 2 weeks, 3 weeks, 1 month, 3 months, 6 months.

- **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 Switch Certification for LWDB 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 Switch Certification for LWDB 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

The steps for staff creating/registering a provider user are the same as those for the users registering themselves. The only difference for staff are that:

- Staff will start from a left menu option (not the home page).
- Some fields are enabled only for staff entry, such as marking the institution as *Active*, or editing the *Vendor ID* or *FEIN*.
- Staff can continue to define the details of the provider type data, and approve/enable the institution, as part of the provider creation.

The following steps summarize creating a provider users, with emphasis on staff entry. For more details for provider users registering themselves, also see the related topics in chapter 2, "*Provider User: Initial Access*."

Staff Registering a Provider User

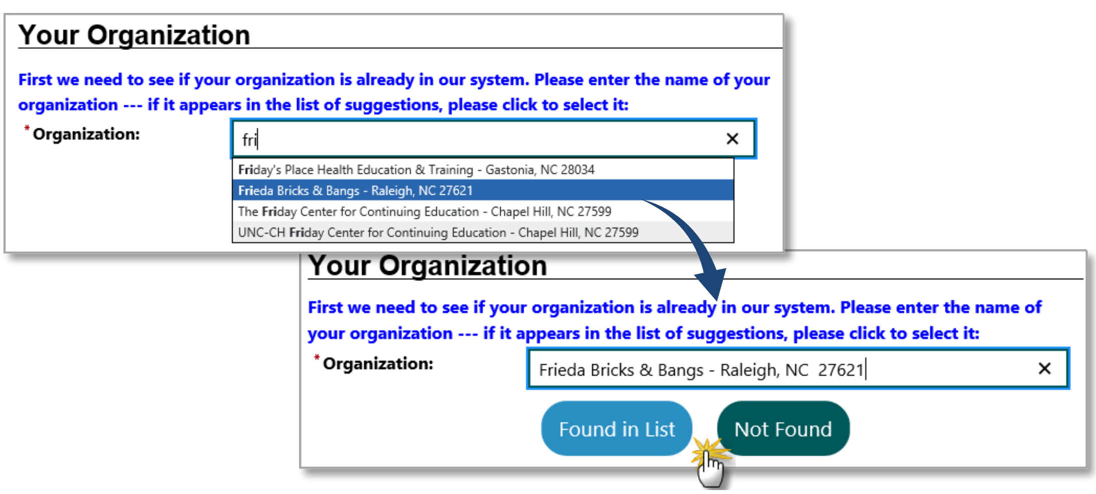
Both provider users registering themselves, and staff creating their registration, will start with a **Your Organization** search screen, to check if the institution exists before creating the provider user. If it exists, selecting in from the search screen will prefill some entries, and link the existing provider institution to the user being created.

When staff create a provider user they will:

▶ **To create a Provider User:**

1 Select **Manage Providers ▸ Create a Provider User** from the **Services for Workforce Staff** menu group.

2 Enter at least three characters of the provider organization name, and then select the correct organization from the displayed list (as shown below).



Your Organization, Found in List and Selected

3 Find and verify the correct provider name displayed in the **Organization** field.

4 Then click the **Found in List** button.

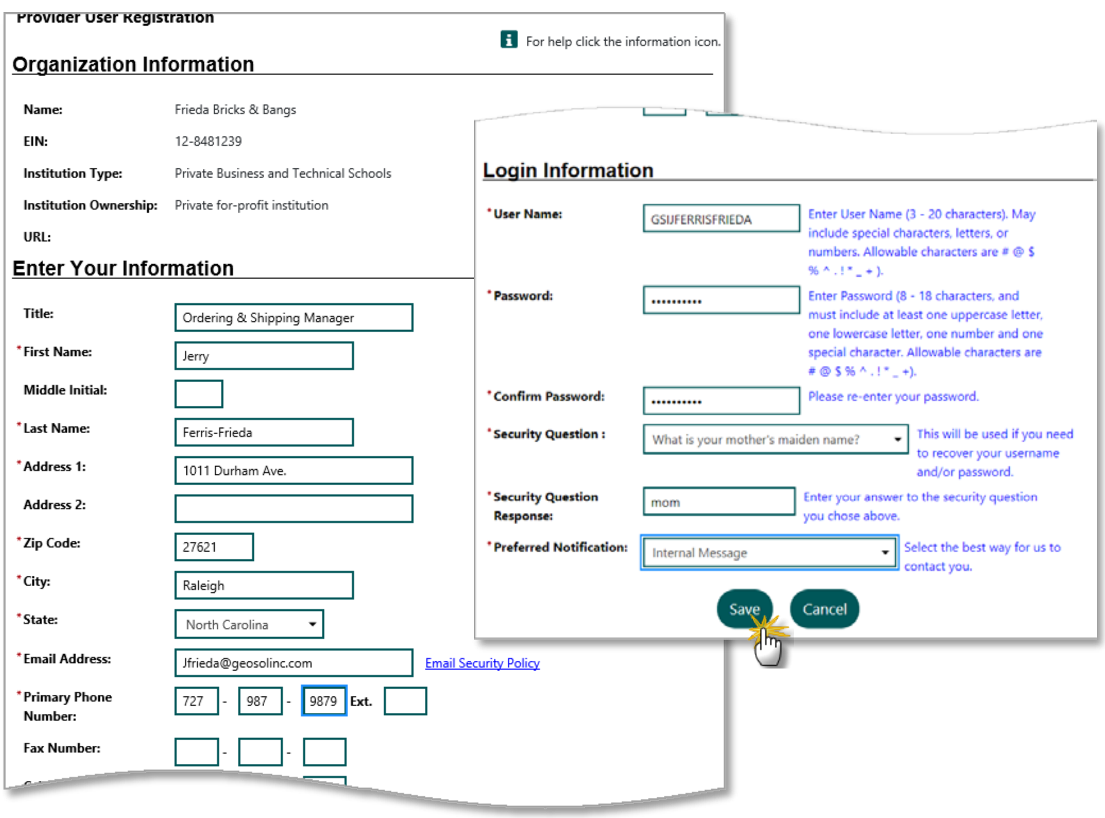
The Provider User Registration screen is displayed (as shown below) with three areas: Organization Information, Enter Your Information, and Login Information.

5 Review the fields in the **Organization Information** area.

These are not entry fields – they are populated from data for the provider you selected. If you see that you selected the wrong provider, you can press **Cancel** at the bottom of the screen. However, if you have the correct provider, and a change in the Organization Info is necessary, that must be done from the Provider Profile, after you complete the registering for this Provider User (e.g., if the EIN number is wrong, or name is misspelled).

6 In the **Enter Your Information** area, enter data about yourself related to your Provider Institution (enter all required fields, as well as any other known information). This includes:

- Your title
- Your name
- The institution address, zip code, city and state (this may be pre-filled if found in a list).
- Your email address (e.g., an email address for you, associated with the provider)
- Your Primary Phone Number



Enter Your Information Section and Login Information Section

7 In the **Login Information** area, enter your desired security access and notification information for accessing your Provider User account. This includes:

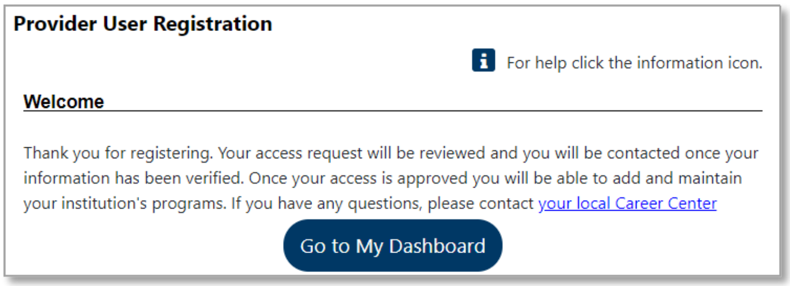
- User Name
- Password
- Confirm Password

Note: *Create a unique User Name and Password that falls within specific guidelines as noted in blue text next to the field. Remember your User Name and your Password; both are needed to access the system.*

- Security Question
- Security Response
- Preferred Notification Method.

8 Click the **Save** button. A Welcome message indicates that your registration is complete.

The Welcome message confirms your registration (for the provider user), and indicates that they will be contacted once the information is verified (via the preferred Notification method).



Registration Confirmation and Welcome Screen

Note: *Until this user registration is verified (i.e., until the* Pending Access *status is changed to* Enabled *by staff), they can login as a Provider User, go to their dashboard, and access some menu options. However, access to options will be limited – they will not be able to set up any course information for their Provider Institution.*

Next Step After Staff Registers the User

As the staff member who registered a provider user for an associated institution, you are already assisting that user when you complete their registration. There are two ways that you can enable their access:

- You can access the **Users** tab from the Provider Profile, to enable their access, immediately after completing their registration (indicated below).
- Or, you can search to assist provider users who are Pending Access, and then enable the user from that list. For details, see the topic*, Enabling a Provider User's Access*, in chapter 7

▶ **To enable a Provider User (from the Provider Profile):**

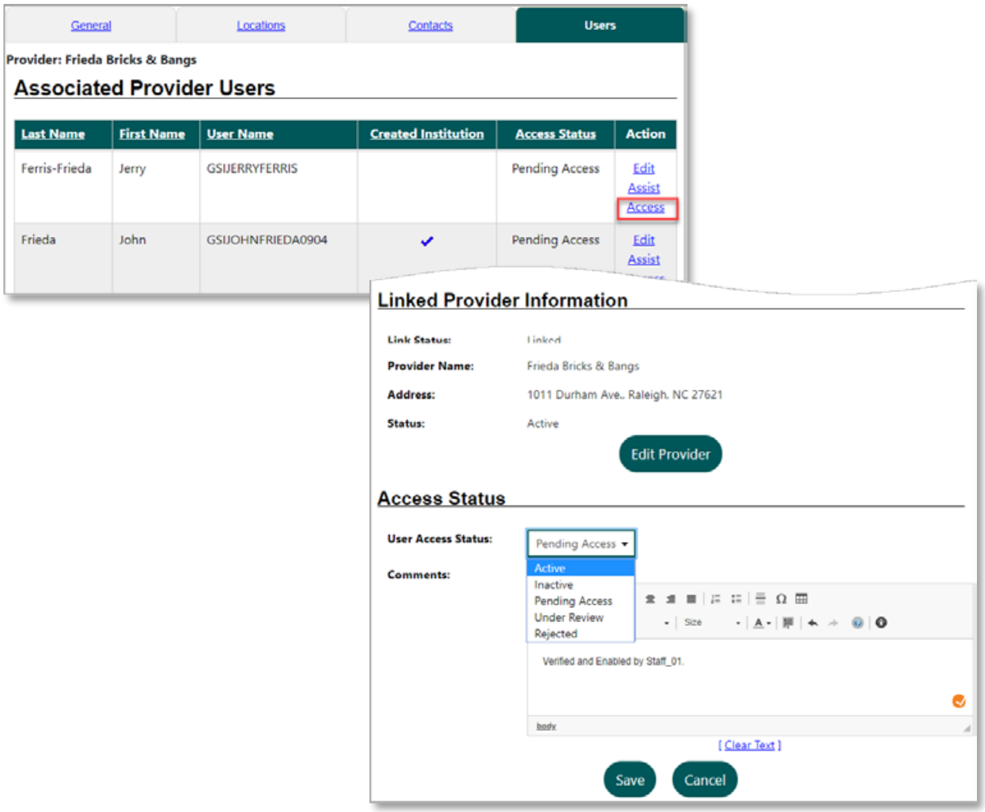
1 Select **Manage Provider Profile** from the **Services for Provider** menu group.

(This group shows near the bottom when you are assisting a Provider User.)

2 Select the Users tab from the displayed Provider Profile.

3 Click the Access link for the Provider User in search results.

This displays the Access Status control (shown in the figure below).



Enter Your Information Section and Login Information Section

- Change the User Access Status to *Active*.
- Enter applicable comments.
- Click the **Save** button.

For details on activating one or more provider users, at any point after their registration, see the topic*, Enabling a Provider User's Access*, in chapter 7.

13: Viewing Provider Reports

Chapter Contents

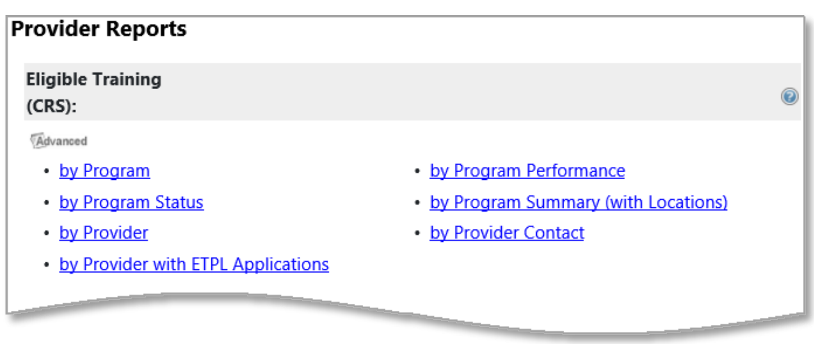
Provider Reports (for Staff)

The Reports section that is 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: by Program, by Programs Status, by Provider, by Provider with ETPL Applications, by Program Performance, by Program Summary (with locations), and by Program Contact. The menu screen looks similar to the following example.



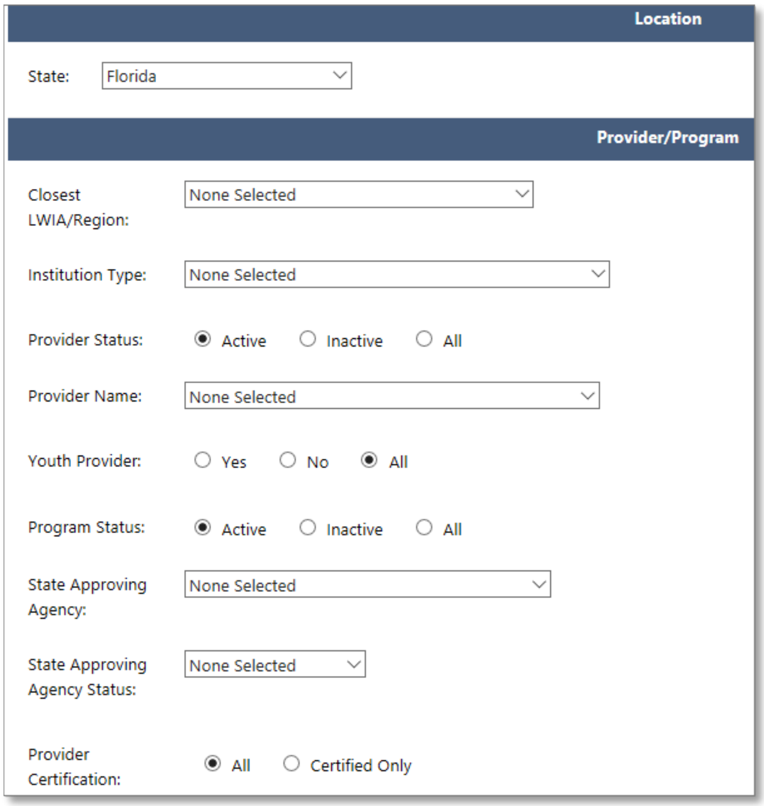
Provider Reports Screen Categories – Eligible Training Provider Reports

By Program Reports

Click on the by Program link in the Eligible Training Provider (CRS) 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 Report Filters (for By Program Reports)

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 Staff Email Search export button. The following is an example of a by Program report.

Staff Email Search

1 of 8

XML file with report data
CSV (comma delimited)
PDF
Excel
Word

Eligible Training Providers – By Program - Summary

Program Status: Active
Youth Provider: All
Provider Certification: All

Provider Name	Provider Code	Program Title	Program ID	CIP Code	CIP Title	State Approving Agency	State Approving Agency Status	Program Service Type	Completion Level	Credential Type	Duration	Total Cost	LWIA Certified
Belleview University	434344	Culinary Arts 101	167	120509	Culinary Science/Culinology. (NEW)	Board of Cosmetology/Barber Examiners	Approved	PS - Approved Provider Training - ITA	Bachelor's Degree	BA/BS Degree	1 Semesters/Terms	$1355.00	Yes
Bobby's Culinary School	121151	Cooking school Salad Prep	24	120500	Cooking and Related Culinary Arts, General.	Board of Cosmetology/Barber Examiners	Approved	PS - Non-ITA Occupational Skills		Occupational Skills certificate or credential	10 Weeks	$6000.00	No
Fred"s HVAC School	0	AC training	32	150501	Heating, Air Conditioning and Refrigeration Technology/Techn	Board of Cosmetology/Barber Examiners	Approved	Not Applicable		Occupational Skills certificate or credential	16 Months	$15000.00	No
Frieda Brick & Bangs	TN1285	Ancient Studies & Cultural Cosmetics	901	450204	Cultural Anthropology. (NEW)			PS - Approved Provider Training - ITA	Associate's Degree	Occupational Skills License	0 Weeks	$270.00	No
Frieda Brick & Bangs	TN1285	Cosmetology Training (Beginning)	821	120401	Cosmetology/Cosmetologist, General.	Board of Cosmetology/Barber Examiners		PS - Approved Provider Training - ITA	Associate's Degree		0 Semesters/Terms	$4800.00	No
Frieda Brick & Bangs	TN1285	Cosmetology Training	820	120401	Cosmetology/Cosmetologist, General.			PS - Approved Provider Training - ITA	Certificate < 1 year		0 Semesters/Terms	$12400.00	No
GSI ETPL Provider	GSI2018U	Computer Programming Basics	841	110201	Computer Programming/Programmer, General.			PS - Approved Provider Training - ITA	Bachelor's Degree		0 Weeks	$1050.00	No
GSI ETPL Provider	GSI2018U	Electrician Apprenticeship	849	460302	Electrician.			PS - Approved Provider Training - ITA	Apprenticeship Programs	Other	0	$550.00	No
GSI ETPL Provider	GSI2018U	Web Programming Apprenticeship	843	110201	Computer Programming/Programmer, General.			PS - Approved Provider Training - ITA			0	$0.00	No
GSI ETPL Provider 1028	TNGSI0001	Accounting Technology	483	520302	Accounting Technology/Technician and Bookkeeping.			PS - Approved Provider Training - ITA	Associate's Degree		4 Semesters/Terms	$10175.00	Yes
GSI ETPL Provider 1028	TNGSI0001	Entrepreneurship	485	520701	Entrepreneurship/Entrepreneurial Studies.	Tennessee Higher Education Commission	Approved	PS - Non-ITA Occupational Skills	Associate's Degree	AA/AS Degree	4 Semesters/Terms	$9950.00	No
Provider Name	Provider Code	Program Title	Program ID	CIP Code	CIP Title	State Approving Agency	State Approving Agency Status	Program Service Type	Completion Level	Credential Type	Duration	Total Cost	LWIA Certified

Total Rows: 270

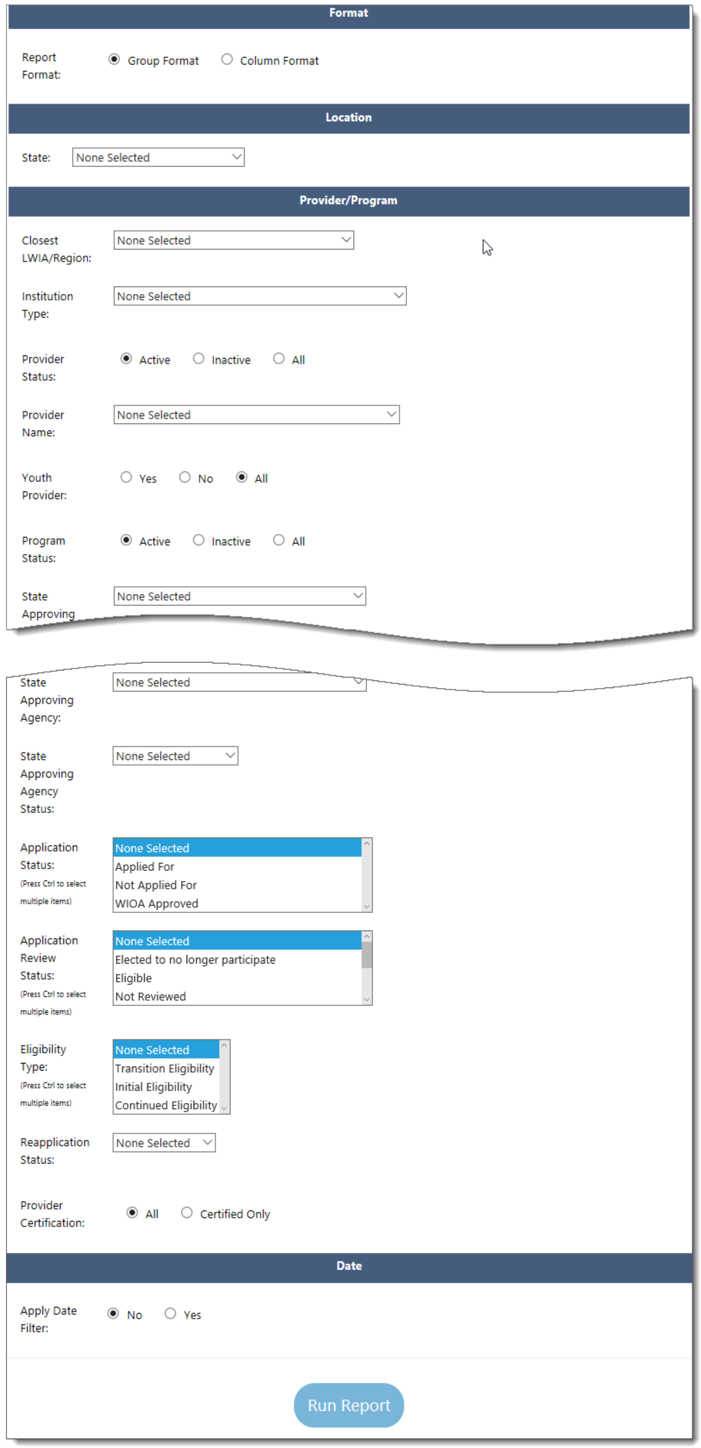
Sample By Program Report Detais

By Program Status Reports

Click on the By Program Status link in the Eligible Training Provider (CRS) 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.

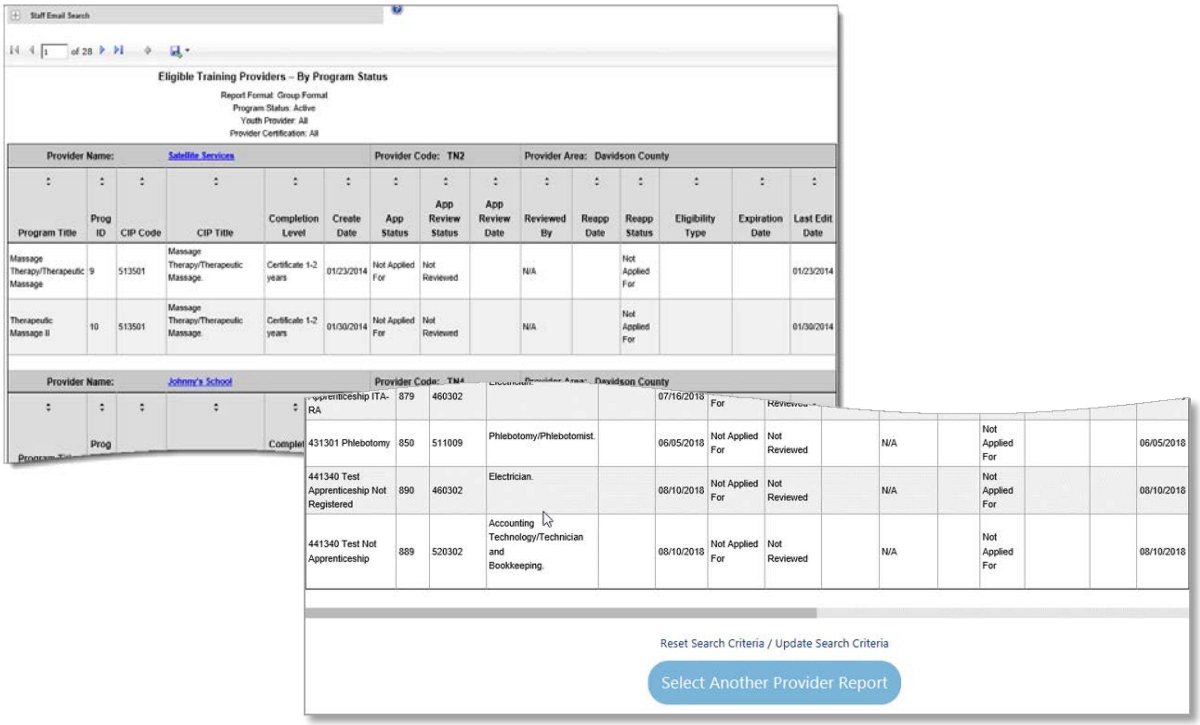
The filter screen appears in the following example.



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 Staff Email Search export button. The following is an example of a by Program Status report.

The following is an example of the report.



Provider Name:	Satellite Services					Provider Code: TN2			Provider Area: Davidson County					
Program Title	Prog ID	CIP Code	CIP Title	Completion Level	Create Date	App Status	App Review Status	App Review Date	Reviewed By	Reapp Date	Reapp Status	Eligibility Type	Expiration Date	Last Edit Date
Massage Therapy/Therapeutic Massage	9	513501	Massage Therapy/Therapeutic Massage.	Certificate 1-2 years	01/23/2014	Not Applied For	Not Reviewed		N/A		Not Applied For			01/23/2014
Therapeutic Massage II	10	513501	Massage Therapy/Therapeutic Massage.	Certificate 1-2 years	01/30/2014	Not Applied For	Not Reviewed		N/A		Not Applied For			01/30/2014

Provider Name: Johnny's School — Provider Code: TN4 — Provider Area: Davidson County

Apprenticeship ITA-RA	879	460302	Electrician.		07/16/2018	For	Reviewed							
431301 Phlebotomy	850	511009	Phlebotomy/Phlebotomist.		06/05/2018	Not Applied For	Not Reviewed		N/A		Not Applied For			06/05/2018
441340 Test Apprenticeship Not Registered	890	460302	Electrician.		08/10/2018	Not Applied For	Not Reviewed		N/A		Not Applied For			08/10/2018
441340 Test Not Apprenticeship	889	520302	Accounting Technology/Technician and Bookkeeping.		08/10/2018	Not Applied For	Not Reviewed		N/A		Not Applied For			08/10/2018

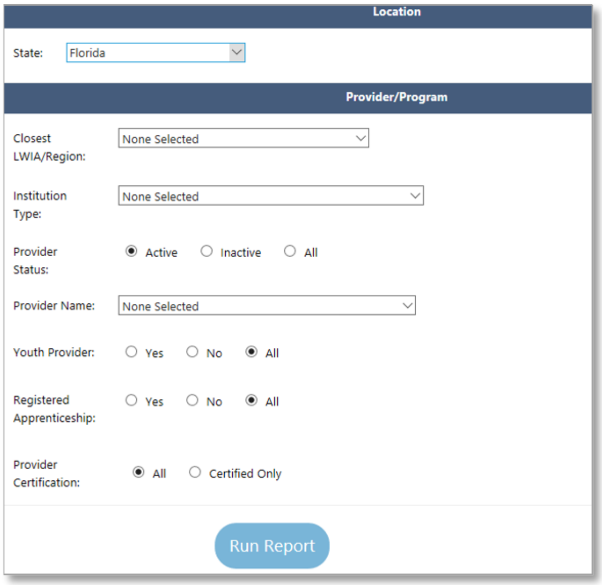
Sample Program Status Report

By Provider Reports

Click on the by Provider link in the **Eligible Training Provider (CRS)** category. Most of the information for this report is taken from the institution's general profile.

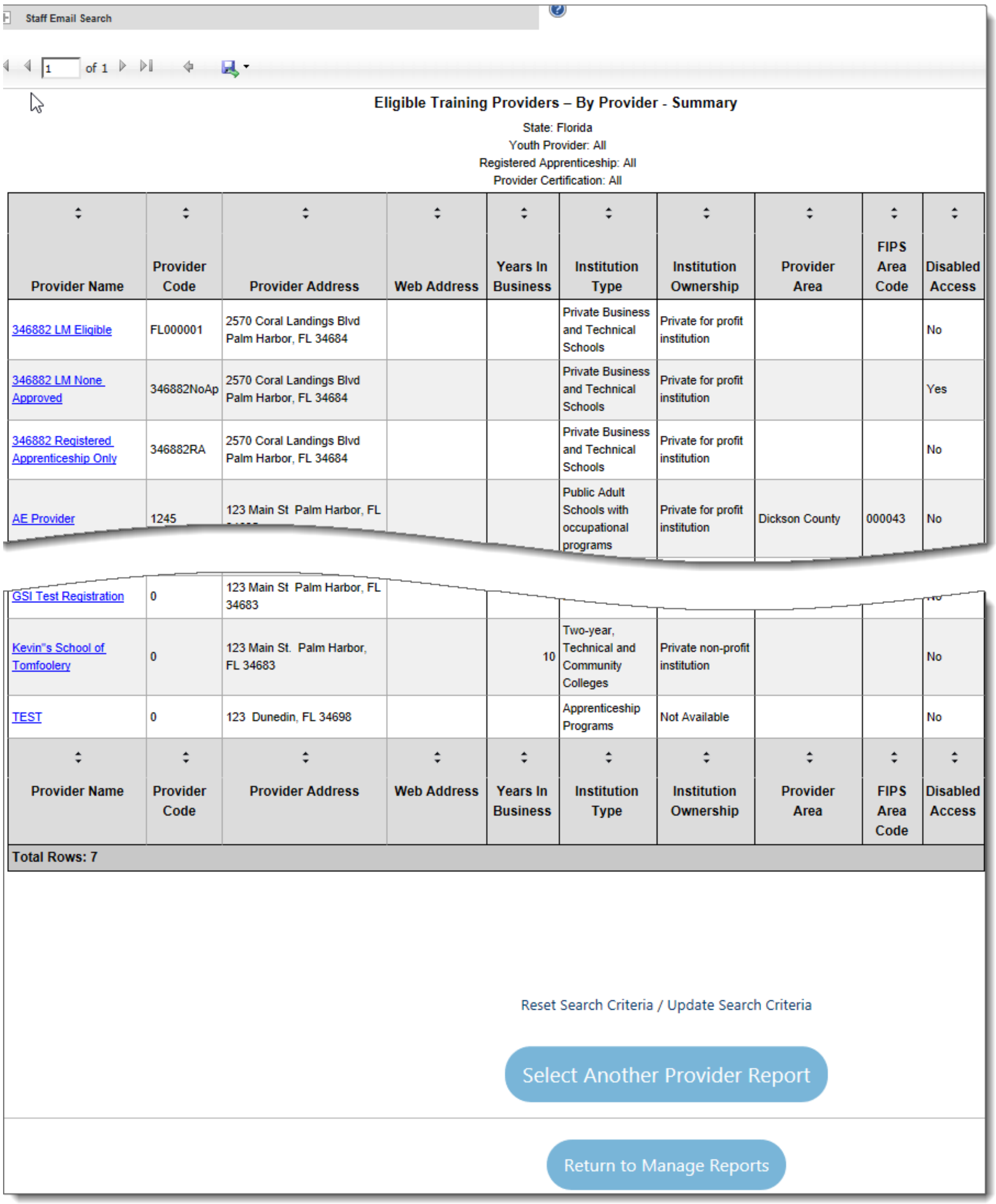
When the screen refreshes, staff can select a provider by location, LWIA/Region, provider type (Two-year University, Public Adult School, etc.), status, provider name, whether it is a youth provider, registered apprentice and provider certification.

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 Staff Email Search export button. The following is an example of a by Provider report.



Eligible Training Providers – By Provider - Summary

State: Florida
Youth Provider: All
Registered Apprenticeship: All
Provider Certification: All

Provider Name	Provider Code	Provider Address	Web Address	Years In Business	Institution Type	Institution Ownership	Provider Area	FIPS Area Code	Disabled Access
346882 LM Eligible	FL000001	2570 Coral Landings Blvd Palm Harbor, FL 34684			Private Business and Technical Schools	Private for profit institution			No
346882 LM None Approved	346882NoAp	2570 Coral Landings Blvd Palm Harbor, FL 34684			Private Business and Technical Schools	Private for profit institution			Yes
346882 Registered Apprenticeship Only	346882RA	2570 Coral Landings Blvd Palm Harbor, FL 34684			Private Business and Technical Schools	Private for profit institution			No
AE Provider	1245	123 Main St Palm Harbor, FL			Public Adult Schools with occupational programs	Private for profit institution	Dickson County	000043	No
GSI Test Registration	0	123 Main St Palm Harbor, FL 34683							No
Kevin"s School of Tomfoolery	0	123 Main St. Palm Harbor, FL 34683		10	Two-year, Technical and Community Colleges	Private non-profit institution			No
TEST	0	123 Dunedin, FL 34698			Apprenticeship Programs	Not Available			No
Provider Name	Provider Code	Provider Address	Web Address	Years In Business	Institution Type	Institution Ownership	Provider Area	FIPS Area Code	Disabled Access
Total Rows: 7									

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 By Provider Contact 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.

Eligible Training Providers – By Provider Contact

State: Florida
Youth Provider: All
Provider Certification: All

Provider Name	Provider Code	Location Name	Location Address	Primary Location	Web Address	Primary Phone	Contact Name	Title	Contact Type	Contact Phone	Contact Fax	Contact Email
AE Provider	1245	AE Provider	123 Main St Palm Harbor, FL 34685	Yes		(111) 111-1111	No Location Contact Provided					
346882 LM Eligible	FL000001	346882 LM Eligible	2570 Coral Landings Blvd Palm Harbor, FL 34684	Yes		(888) 888-8888	No Location Contact Provided					
346882 LM None Approved	346882NoAp	346882 LM None Approved	2570 Coral Landings Blvd Palm Harbor, FL 34684	Yes		(888) 888-8888	No Location Contact Provided					
346882 Registered Apprenticeship Only	346882RA	346882 Registered Apprenticeship Only	2570 Coral Landings Blvd Palm Harbor, FL 34684	Yes		(555) 555-5555	No Location Contact Provided					
Provider Name	Provider Code	Location Name	Location Address	Primary Location	Web Address	Primary Phone	Contact Name	Title	Contact Type	Contact Phone	Contact Fax	Contact Email

Total Rows: 4

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 Staff Email Search export button.

Provider Reports

The Provider Reports under the Detailed Reports section are divided into three different categories: by Contact, by Providers, and by Program. The menu screen looks similar to the following example.

Provider:

Advanced

- by Contact
- by Providers
- by Program

Provider Reports Screen Categories – Provider Reports

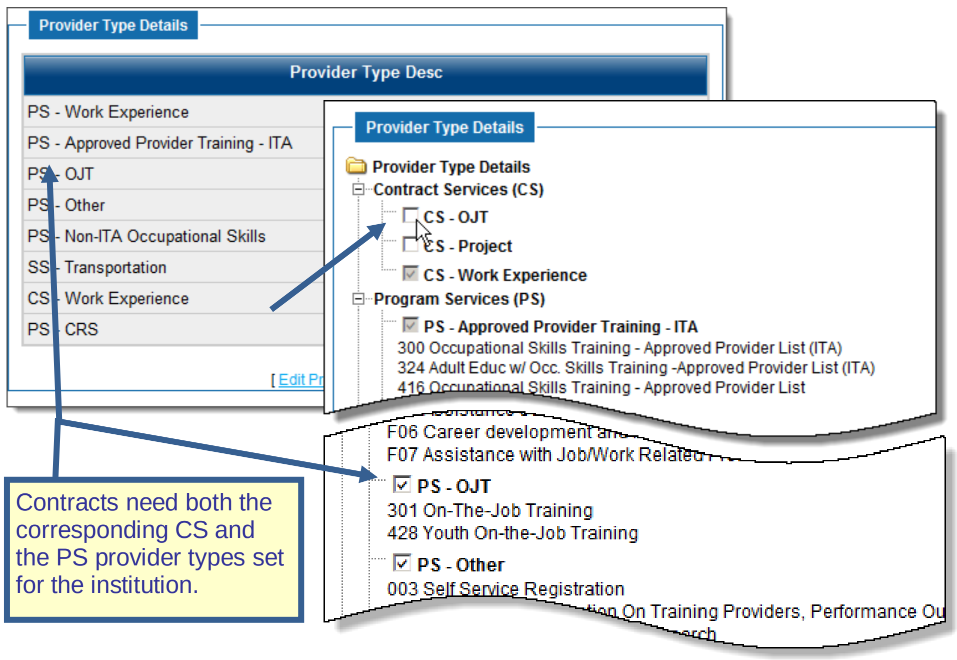
These reports provide details on providers in general.

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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