Trade Adjustment Assistance - Entering Classroom Training Services & Funding

OSOS Guide
# TABLE OF CONTENTS

Purpose ........................................................................................................................................ 2
Logging into the Correct Office .................................................................................................. 3
Finding the Customer Record to add a TAA Service ................................................................. 4
Entering a Training Service for a TAA Participant ..................................................................... 6
Funding a Training Service .......................................................................................................... 18
Ending a Training Service .......................................................................................................... 22
Entering Comments ..................................................................................................................... 24
Resources and Assistance ............................................................................................................ 25
PURPOSE
The TAA program offers customers various benefits. One of these benefits is training. Customers determined eligible for TAA can choose to utilize this benefit through distance and/or classroom training. Training will only be approved for a program that leads to an occupational goal that is in demand. A TAA approved training program must lead to a degree, certificate, or other industry recognized credential or credentials. There must be a reasonable expectation of employment following the completion of training.

Trade Act funds may be applied toward remedial, prerequisite, online, and classroom training. A TAA approved training program may include remedial training and/or pre-requisite training that is followed by, or runs concurrent with, occupational training. Remedial training as a standalone training program can be approved only when the lack of such remedial training is the only barrier to employment. Please note, this is rarely approved.

This guide will provide comprehensive OSOS data entry instructions on recording a single service for customers in a TAA approved training program. This includes data entry for adding, funding, and ending the training service.

*Training services under the Trade Act are not required to be listed on the Eligible Training Provider List (ETPL).*
LOGGING INTO THE CORRECT OFFICE

Staff must ensure that they are logged into OSOS in the same office associated with the customer before recording any activities or services.

The user's Primary Office and the Current Office the user is logged into (if the user has any secondary office assignments), is displayed in the Staff module> Preferences window> Login Preferences tab.

To change the current office, select the appropriate office from the Change Office To drop-down field and then click the Change Office button.
FINDING THE CUSTOMER RECORD TO ADD A TAA SERVICE
DISTANCE AND CLASSROOM TRAINING

A TAA approved training program must be entered as a single service in OSOS.

Enter separate training services when different providers are involved (i.e. a remedial provider and an occupational training provider). Do not enter separate training services for separate semesters or separate courses.

From the Customer module> Customer Search window> Quick Search tab>, search for the appropriate customer record. This can be accomplished by entering the customer’s Last Name and First Name as the search criteria. Click the Search button.
From the customer record, click the **Services** button to navigate to the **Services** window.
ENTERING A TRAINING SERVICE FOR A TAA PARTICIPANT

From the Customer module > Services window select the Services tab. The Services tab shows the services Detail for the customer. Click the New Service button at the bottom of the screen.
OSOS will navigate to the **Provider module > Offering Search window > Quick Search tab.** If known, enter the **Offering ID**, then click the **Search** button. **NOTE:** Multiple Offering IDs may be entered. Then click the **Search** button.
If the Offering ID is unknown, the service offering can be searched from the **Customer** module > **Offering Search** window > **General Info** tab. Enter the training program information in the data field(s) and click the **Search** button.

There are designated staff in each of the LWDBs that have permission to create and modify provider offerings. If the offering is not found or needs to be modified, contact the appropriate staff. For more information, reference the OSOS Guide: Creating Providers, Services and Offerings.
The search may result in multiple offerings that match the specified search criteria. To view the details of an offering, select the desired offering. Click the Detail button.
The system will navigate to the **Provider** module > **Offering Detail** window > **General Info** tab as shown below. If only one offering matches the search criteria, OSOS navigates directly to this screen.

Review the offering and click **Return to Search**. If a different offering is required, repeat the previous steps until the desired offering is found.
When the appropriate offering is identified, check the corresponding box to highlight the offering and click **Schedule**.
Clicking the **Schedule** button navigates directly to the **Customer** module > **Services** window > **Services** tab. The **Service Type**, **Provider Name**, **Location Name**, and other details will auto-populate in the **Detail** section and are shown in the grayed-out fields.

The **Planned Start Date** and **Actual Start Date** of the service cannot be earlier than the **Application Date**, **Qualifying Separation Date**, and **Eligibility Determination Date**.

**Note:** The **Application Date** will always be on or before the **Eligibility Determination Date**.

**Exception:** When data entering the **Application Date** and **Eligibility Determination Date** for Adversely Affected Incumbent Workers (AAIW) you must enter the mail date of the threatened status letter in both fields. Contact the TAA unit for assistance, TAA.WDTD@labor.ny.gov
Complete the data fields in the **Detail** section of the tab:

- **Planned Start Date**: The date the service is expected to start.
- **Planned End Date**: The date the service is expected to end.
- **Actual Start Date**: The date the service begins.
- **Program Service Type**: Select "ITA - Training" for classroom training from the drop-down menu.
- **Part Time Learn**: Select "Yes" to indicate the classroom training is part-time. Select "No" to indicate the classroom training is full-time.
- **Distance Learn**: Select "Yes" if the classroom training will include on-line or another form of distance learning. Select "No" if the classroom training does not include any form of distance learning. Please note, when distance learning is provided by a second training provider, you must list it as a separate service.
- **O*Net**: Select the O*Net Title that best describes the occupation that the customer plans to pursue when training is completed.

Click **Save**.
Click the **O*Net** button. This will bring up the **Select O*Net--Webpage Dialog** screen.

To search for the desired O*Net, enter applicable keyword(s) and click **Search**.
Use the scroll bar to view all O*Net Titles containing the keyword. Check the box of the appropriate O*Net Title.
If the details of the O*Net Title do not need to be reviewed, click the Select button to populate the O*Net field of the Services Detail section.

For more information on the selected O*Net Title, click the Details tab. This contains the description of job duties for the selected O*Net Title.

If the O*Net Title is appropriate, click Select. If a different O*Net Title is required, click the Hierarchy Search tab. NOTE: Clicking the Cancel or Clear buttons from the Details tab will remove the O*Net window. Repeat the previous steps until the desired O*Net Title is found.
Upon selection of the O*Net Title, the system returns to the **Customer** module > **Services** window > **Services** tab. Click **Save**.
FUNDING A TRAINING SERVICE

The appropriate funding source must be attached to the service. The training service must be funded with TAA funds for reporting purposes.

The training service is funded in the Customer module > Services window > Services tab.

Select the appropriate training service at the bottom of the Services tab if not already displayed in the Detail section to begin entering information in the Funding section.
Enter $1.00 in the **Total Funding** field. Select the correct **Petition #** from the drop-down menu. Select the appropriate **RR Event #** from the drop-down menu, if applicable. Click the **Add** button.

*The $1.00 used to fund services in OSOS is not reflective of any real costs of service. It is the convention used for tracking services in the system. Some of the information is used for federal reporting purposes.*

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*The Petition # drop-down menu will only be available after all information has been entered in the customer's Work History tab, including the Eligibility Determination Date. Refer to the Trade Adjustment Assistance Intake & Eligibility OSOS Guide for more information about accurately completing a TAA customer's Work History tab.*
This will open the **Funding - Webpage Dialog** box. From the listed **Funding Sources**, select the appropriate TAA funding with the most recent year. Enter $1.00 in the **Obligated Amount** data field. Click **OK**.

*Use TAA Funds for all Trade Act training services. Do not split training funds between TAA and any other funding source, including Dislocated Worker.*
Click **Save**.

The Training Service is now entered and TAA funded.
ENDING A TRAINING SERVICE

When the training service has ended, the service must be closed. To close a service, navigate to the **Customer** module > **Services** window > **Services** tab.

From the Services list, select the Service to be closed. Once selected, the details for that service will populate in the **Detail** and **Funding** sections.
Planned End Date: If the training program was accelerated or extended, a new date must be entered. Enter a Comment in the customer record detailing why the end date has been changed.

Actual End Date: Enter the end date of the training. If there is an exam given after the end of the training, this is considered the actual end date of the service and must be entered in this field.

Completed Successfully: Select "Yes" or "No" from the drop-down menu. Select "Yes" if the program was completed successfully. If the customer quit or was terminated from the training program before successful completion, enter the customer’s last day in training as the Actual End Date and select "No" from the Completed Successfully drop-down menu. Enter a comment in the customer record detailing why the training ended unsuccessfully.

Click Save.
TAA Central Office staff sends a monthly Completion Report to each local TAA Coordinator alerting them to training that is expected to be complete in the upcoming month. The report includes the customer's OSOS ID number, contact information, and training information, including the scheduled end date. Each local TAA Coordinator should follow up with customers regarding completion of training per the guidance included with the report.

ENTERING COMMENTS
As a best practice, when a customer's training program has been extended or ended unsuccessfully, staff should record relevant, detailed comments. Information such as the reason for the extension or the reason(s) why the customer was unable to complete the program, and last day of attendance should be included in the comment.

![Comment Webpage Dialog]

Customer was not able to complete training due to health reasons. Last day of training was 1/31/18.
RESOURCES AND ASSISTANCE

Additional ETA program information and other resources can be found at:
http://www.doleta.gov/tradeact/factsheet.cfm

TAA Program Guides: https://labor.ny.gov/workforcenypartners/tools.shtm


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

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