USING THE TRA BENCHMARKS TAB

The TRA Benchmarks tab is located in the Services window of the Customer Module. To enter TRA Benchmarks, the customer must have an IEP service attached to a petition number.

Navigate to the TRA Benchmarks tab and select the IEP service in the upper left-hand quarter of the screen (1). If there are multiple IEP services listed, verify that this is the correct IEP by looking at the data displayed in the upper right-hand quarter of the screen, in the **IEP Service Info** box (2).
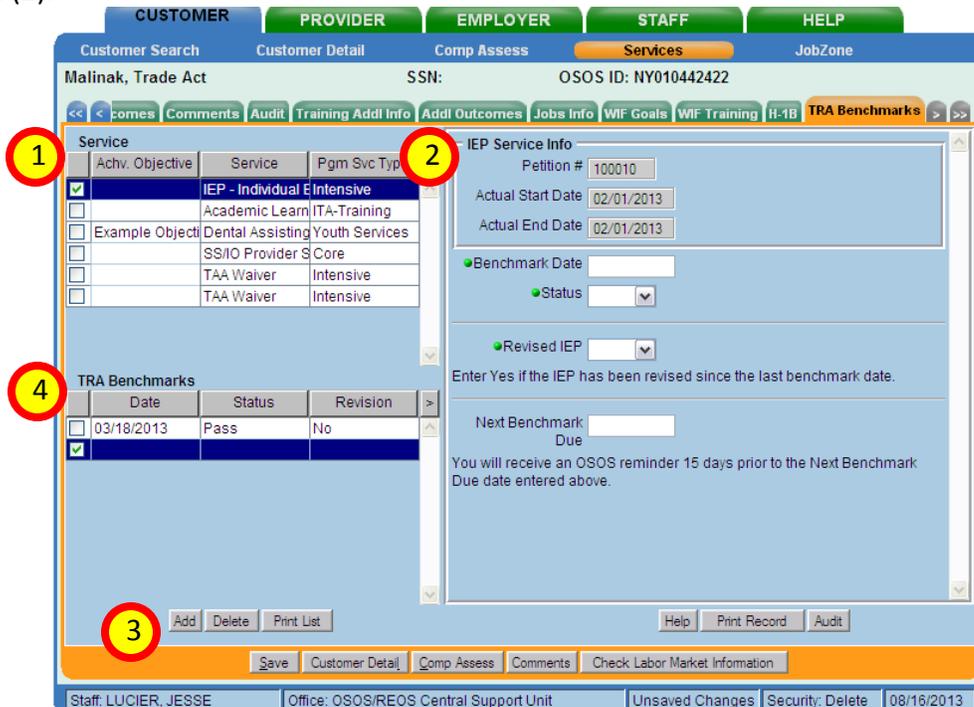
Once the correct service is selected, click the **Add** button in the bottom left-hand corner (3). A new record will be added to the list just above the button labeled **TRA Benchmarks** (4). Select this record and four fields on the right-hand side become visible: **Benchmark Date**, **Status**, **Revised IEP**, and **Next Benchmark Due**. Complete these fields:

- **Benchmark Date**: Enter the date the benchmark review took place. This should usually be today, or, in the case of backdating, an earlier date.
- **Status**: Enter whether the benchmark was passed or failed. Remember, the customer must meet both criteria to pass the benchmark review.
- **Revised IEP**: Mark whether the customer's IEP was revised since the last benchmark date. If a revision is planned, but has not been submitted and approved, Enter **No**. *Please note: all benchmark reviews must be entered under the same IEP service. Do not create a new IEP service, even if the IEP has been revised.*
- **Next Benchmark Due**: If a date is entered on this field, a reminder will appear in your staff inbox 15 days before that date.

Click **Save** to save the record when you are done entering data. Repeat this each time a new benchmark review is completed. Each additional review record will be listed under **TRA Benchmarks** (4).