

Trade Adjustment Assistance - Entering Benchmarks OSOS Guide



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PURPOSE

Benchmarks measure the progress of the customer in training and enable the TAA Specialist to monitor the customer's progress toward completing the approved training within the 130-week maximum duration of training. A customer who is attending their last semester/weeks of TAA-approved training, and who has exhausted Basic TRA and Additional TRA, will be allowed to collect 13 weeks of Completion TRA, if Benchmarks are successfully completed and other conditions are also met. Failing two benchmark reviews without revising the training plan results in a loss of eligibility for Completion TRA. If the customer has failed two benchmark reviews, and the training plan is subsequently revised, the customer would be eligible for Completion TRA. Once a training plan has been revised, the revised plan brings the number of failed reviews to "0", and the process to determine the number of failed reviews begins again.

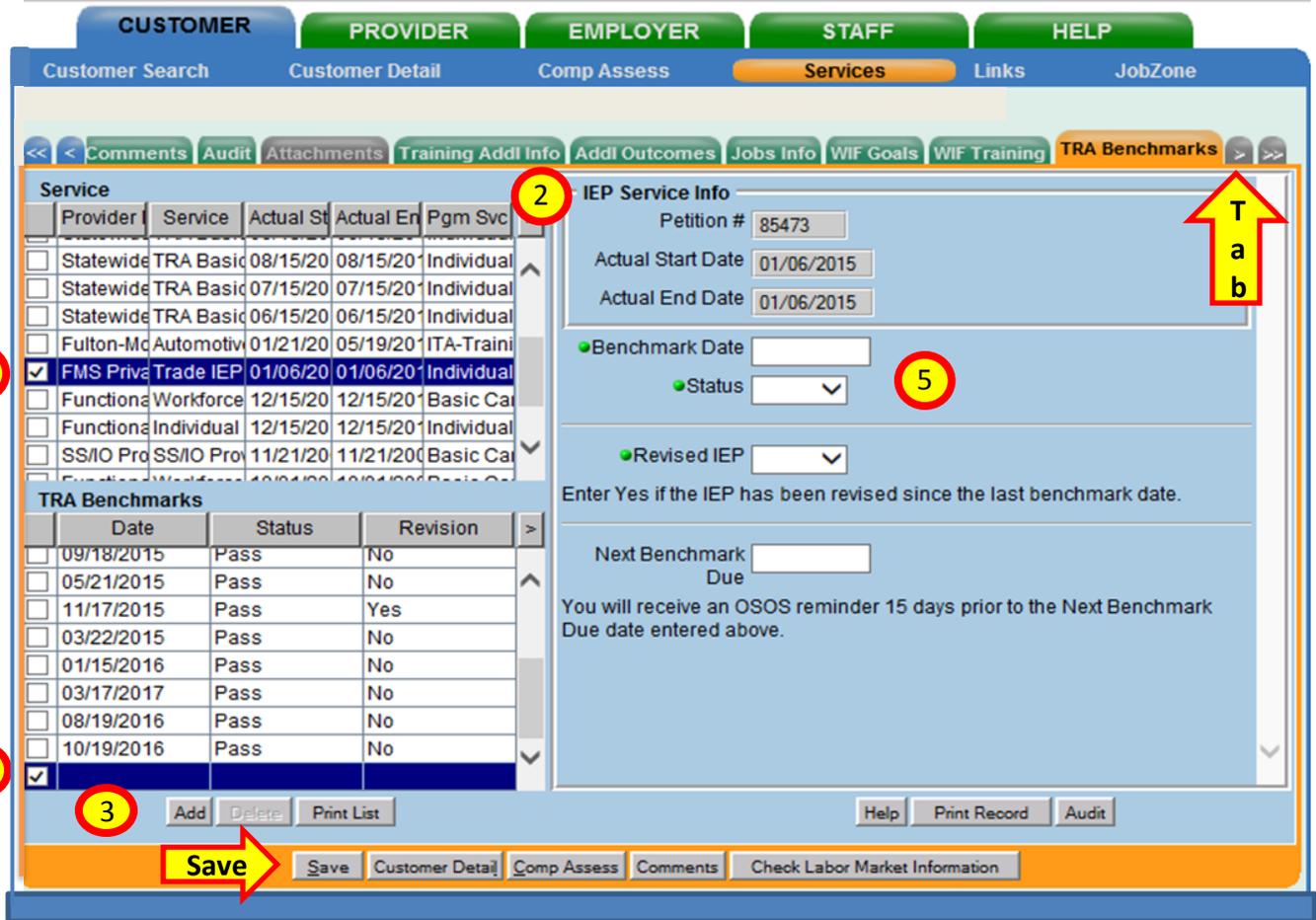
This guide provides detailed instructions on how to enter benchmarks in OSOS for TAA eligible customers and record the service performed. This guide will cover data entry that is required once a TAA customer has been enrolled in training, including accurately completing the Comments section to document the customer's progress.

ENTERING TRAINING BENCHMARKS

Training benchmarks may be used to provide early intervention for the customer. The benchmarks provide an opportunity to determine whether the current training plan is the most appropriate for the customer. To enter training benchmarks, the customer must have an Individual Employment Plan (IEP) service attached to a petition number. As part of documenting a customer's training benchmarks, you must enter all other services provided to the customer including, counseling, job search assistance, etc. Training Benchmarks must be completed **every 60 days**.

To enter a training benchmark, proceed to the **Customer** module > **Services** window. Use the arrow to the right of the tabs to access the **Training Benchmarks** tab.

1. Select the **IEP Service** from the **Service** list on the left side of the screen.
2. If there are multiple **IEP services** listed, verify *that* the data displayed in the **IEP Service Info** box on the right side of the screen matches your customer's petition number, and start and end dates for the current training program.
3. Once the correct **IEP service** is selected, click the **Add** button.
4. A new record will be added to the list labeled **TRA Benchmarks**. Check the box next to this new record.
5. Four fields on the right side will become accessible.



6. **Benchmark Date:** *This is the* date the benchmark review took place.

7. **Status:** *Select* whether the benchmark was passed or failed.



The customer must meet the following criteria in order to pass a training benchmark:

- Maintain good academic standing (e.g. not on probation or determined to be "at risk" by the instructor or training institution)

Remain on schedule to complete the training within the timeframe identified in the approved training plan and the Individual Employment Plan (IEP)

8. **Revised IEP:** Mark whether the customer's **IEP service** was revised.

Please note: Do not create a new IEP service, even if the IEP has been revised.

A revised training plan would include a change in occupation, type of training or training provider. If a training plan has been revised, the revised plan brings the number of failed reviews to "0" and the process to determine the number of failed reviews begins again.



9. **Next Benchmark Due:** Enter the Next Benchmark date in this field. Training Benchmark reviews are required at intervals of no more than 60 days to ensure continuation of the customer's TRA benefits.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess **Services** Links JobZone

<< < Comments Audit Attachments Training Addl Info Add Outcomes Jobs Info WIF Goals WIF Training **TRA Benchmarks** >>

Service	Provider	Service	Actual St	Actual En	Pgm Svc
<input type="checkbox"/>	Statewide	TRA Basic	08/15/20	08/15/20	Individual
<input type="checkbox"/>	Statewide	TRA Basic	07/15/20	07/15/20	Individual
<input type="checkbox"/>	Statewide	TRA Basic	06/15/20	06/15/20	Individual
<input type="checkbox"/>	Fulton-Mc	Automotiv	01/21/20	05/19/20	ITA-Traini
<input checked="" type="checkbox"/>	FMS Priv	Trade IEP	01/06/20	01/06/20	Individual
<input type="checkbox"/>	Function	Workforce	12/15/20	12/15/20	Basic Cal
<input type="checkbox"/>	Function	Individual	12/15/20	12/15/20	Individual
<input type="checkbox"/>	SS/IO Pr	SS/IO Prov	11/21/20	11/21/20	Basic Cal

IEP Service Info

Petition # 85473

Actual Start Date 01/06/2015

Actual End Date 01/06/2015

Benchmark Date **6**

7 Status

Revised IEP **8**

Enter Yes if the IEP has been revised since the last benchmark date.

Next Benchmark Due **9**

You will receive an OSOS reminder 15 days prior to the Next Benchmark Due date entered above.

TRA Benchmarks	Date	Status	Revision
<input type="checkbox"/>	09/18/2015	Pass	No
<input type="checkbox"/>	05/21/2015	Pass	No
<input type="checkbox"/>	11/17/2015	Pass	Yes
<input type="checkbox"/>	03/22/2015	Pass	No
<input type="checkbox"/>	01/15/2016	Pass	No
<input type="checkbox"/>	03/17/2017	Pass	No
<input type="checkbox"/>	08/19/2016	Pass	No
<input type="checkbox"/>	10/19/2016	Pass	No
<input checked="" type="checkbox"/>			

Add Delete Print List Help Print Record Audit

Save Save Customer Detail Comp Assess Comments Check Labor Market Information

Click the **Save** button.

Repeat this process each time a new benchmark review is completed. Each additional benchmark review will be listed under the **Customer** module > **Services** window > **TRA Benchmarks Tab**.

Section 6 (see example below) of the TAA IEP form helps the TAA Specialist create a schedule of benchmark review dates. Once completed, provide the customer with a copy of the schedule.



TAA Specialists can use the following website to calculate 60-day intervals; timeanddate.com



*If a customer is on a scheduled break and is not **actively** attending training for longer than 30 days, they cannot fail a benchmark for that 60-day interval.*



Employment Plan

6. Training Benchmarks: Completion Trade Readjustment Allowance

(complete for Petitions TA-W #80,000 and higher)

Trade Adjustment Assistance customers who are enrolled in TAA approved training may be eligible for 117 weeks of income support. This includes 26 weeks of Unemployment Insurance Benefits, 26 weeks of BASIC Trade Readjustment Allowance and 65 weeks of Additional Trade Readjustment Allowance. An additional 13 weeks of income support (**Completion Trade Readjustment Allowance**) may also be available. In order for you to receive Completion TRA you must meet the following conditions:

1. The requested weeks are necessary for you to complete the training program
2. You are participating in training in each such week.
3. You have substantially met the performance benchmarks established in the approved training plan.
4. You are expected to continue to make progress toward the completion of the approved training.
5. You will be able to complete the training during the period authorized for receipt of Completion TRA.

In addition to the five conditions outlined above, you must also meet the following two **Training Benchmarks** at intervals of no more than 60 days beginning with the start of TAA approved training.

1. Maintaining satisfactory academic standing (e.g. not on probation or determined to be “at risk” by the instructor or training institution); and
2. On schedule to complete training within the time frame identified in the approved training plan.

It is your responsibility to provide documentation of the satisfactory progress towards meeting the training benchmarks from the training provider, such as through the training provider’s attestations. If your training provider indicates you are not meeting one or both of these benchmarks an explanation from your training provider is required. An email from the training provider to your TAA counselor would be acceptable.

Summary

I am responsible for providing my counselor school progress information every 60 days. This may be progress reports, grades, etc. which show that I am maintaining satisfactory academic standing (for example: not on academic probation or determined to be “at risk” by the instructor or training institution) and that I am on schedule to complete training within the time frame identified in this training plan. To be eligible for Completion TRA, (TAAEA/Reversion participants only) I acknowledge that I must be on track to graduate as outlined in this agreement, and must maintain contact with my counselor in person, by phone or by email every 60 days with deadlines as indicated in the schedule included below, for the duration of my training program.

<http://www.timeanddate.com/date/dateadd.html>

Deadline for Day 60 Check-In <input type="text"/>	Deadline for Day 120 Check-In <input type="text"/>
Deadline for Day 180 Check-In <input type="text"/>	Deadline for day 240 Check-In <input type="text"/>
Deadline for Day 300 Check-In <input type="text"/>	Deadline for Day 360 Check-In <input type="text"/>
Deadline for Day 420 Check-In <input type="text"/>	Deadline for day 480 Check-In <input type="text"/>
Deadline for Day 540 Check-In <input type="text"/>	Deadline for Day 600 Check-In <input type="text"/>
Deadline for Day 660 Check-In <input type="text"/>	Deadline for day 720 Check-In <input type="text"/>
Deadline for Day 780 Check-In <input type="text"/>	Deadline for Day 840 Check-In <input type="text"/>
Deadline for Day 900 Check-In <input type="text"/>	

EVALUATING BENCHMARKS SATISFACTORY PROGRESS IN TRAINING

To complete the 60-day benchmark reviews, TAA Specialists must be provided with confirmation from the training provider that the customer is in good academic standing and is on schedule to complete training, in accordance with the approved plan and the IEP. TAA Specialists can choose from one of the following options to obtain this information.

- Supply the customer with a pre-filled **Benchmark Form** (sample below) to take to the training provider. The training provider completes their section and signs the form. This form can be accessed here: [Training Benchmark Progress Report](#)
- Provide a pre-filled **Benchmark Form** directly to the training provider. The provider completes their section and signs the form.
- Contact the training provider over the phone. After consultation with the provider and the customer, the TAA Specialist would attest to the customer's satisfactory progress by completing the Benchmark Form and placing it in the customer's file. Be sure the name and title of the school representative is noted on the form and in OSOS.
- Request that the instructor provides documentation of the customer's satisfactory progress via email, or other attestation from the instructor.

EVALUATING BENCHMARKS SUBSTANDARD BENCHMARK REVIEWS

After one failed benchmark review, the customer must be given a warning. Failing the first benchmark should be considered a red flag to the TAA Specialist regarding the appropriateness of the training plan. Two failed benchmarks must result in a revision to the customer's training plan, or the customer will no longer be eligible for Completion TRA.



TAA's six criteria for approval of training require that the customer is qualified to undertake and complete their training. If it becomes clear that the customer will not successfully complete training after a benchmark review, then the training plan must be revised.

WHEN IS COMPLETION TRA PAID?

To be eligible for Completion TRA, customers must have already exhausted both Basic and Additional TRA and passed their benchmarks. Completion TRA is only available to customers who will complete their training within a 20-week period. Only 13 weeks of benefits are available within this 20-week period. Customers should understand that the 13th (or last) Completion TRA payment must take place during their last week of training.



New York State Department of Labor
 Division of Employment & Workforce Solutions
 Trade Adjustment Assistance
Training Benchmark Progress Report

Participant Name:	Petition Number:	Date Form Issued to Participant: / /
Participant Address:		Return To:
Training Start Date: / /	Training End Date: / /	Deadline to Return: / /
60 Day Benchmark Period: / / - / /		
Training Facility:		
Training Course (Program):		

TRAINING PARTICIPANT:

In accordance with the TAA Extension Act of 2011/TAA Reauthorization Act of 2015 and your Individualized Employment Plan, you are required to maintain satisfactory academic standing and complete your training by the end date specified above in order to meet the requirements for receipt of Completion TRA.

- Please return this form to your Career Advisor **by the deadline date listed above**
- Please have a designated representative from the training facility (i.e. Trainer/Guidance Counselor/Academic Advisor/Instructor) sign and complete the following section.

TRAINING FACILITY:

- Please complete Q1 and Q2 relative to the Training Participant for the 60 Day Benchmark Period, and sign and date the form.

Q1: Student is maintaining satisfactory academic standing (e.g. not on probation; not determined to be "at risk" by the instructor or training institution) Yes No

Q2: Student is on schedule to complete training within the timeframe identified in the approved training plan (Training Start Date and End Date specified above) Yes No

If "No" was selected for any of the above please explain (add additional page if necessary):

Training Facility Representative Name

Training Participant Signature and Date

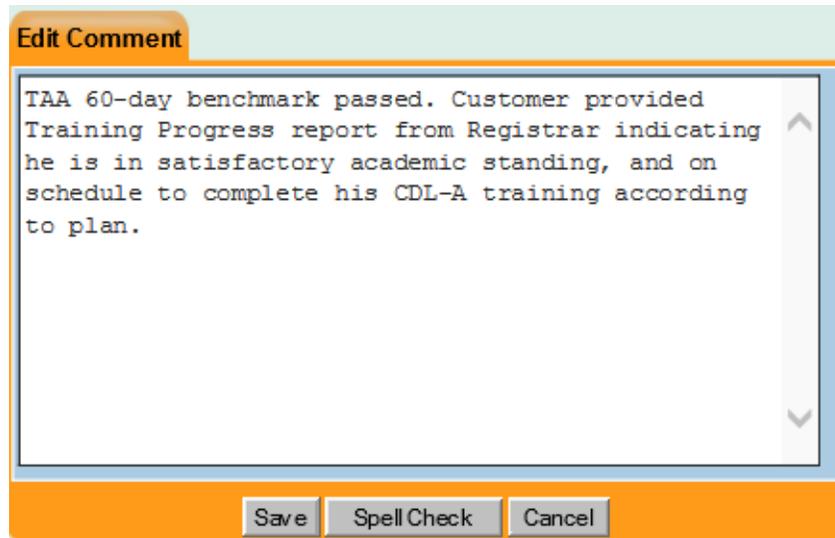
Title

Signature and Date

Career Advisor Signature and Date

ENTERING COMMENTS

Remember, when ending the TRA benchmark activity, the TAA Specialist must record relevant comments in the **Customer** module > **Services** window > **Comments** tab. Comments may include information such as the customer's training program, the expected completion date, and whether the customer passed or failed the benchmark.



Edit Comment

TAA 60-day benchmark passed. Customer provided Training Progress report from Registrar indicating he is in satisfactory academic standing, and on schedule to complete his CDL-A training according to plan.

Save Spell Check Cancel



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>

TAA Quick Guide for Petitions: <https://labor.ny.gov/workforcenypartners/taa/quick-guide-for-petitions-ta-w-80000.pdf>

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

TAA Benchmark Training Progress Reports can be found at:

<https://labor.ny.gov/workforcenypartners/taa/TAA-Benchmarks-Training-Progress-Report.pdf>

TAA Employment Plan can be found at:

<https://labor.ny.gov/workforcenypartners/taaforms/taaforms.shtm>

For assistance calculating 60-day benchmark dates, please use:

<https://www.timeanddate.com/date/dateadd.html>

Previous Guide to Training Benchmarks- Trade Adjustment Assistance can be found at:

<https://labor.ny.gov/workforcenypartners/taa/TAA-Benchmarks-Guide.pdf>