

Trade Adjustment Assistance - Entering Classroom Training Services & Funding OSOS Guide



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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.



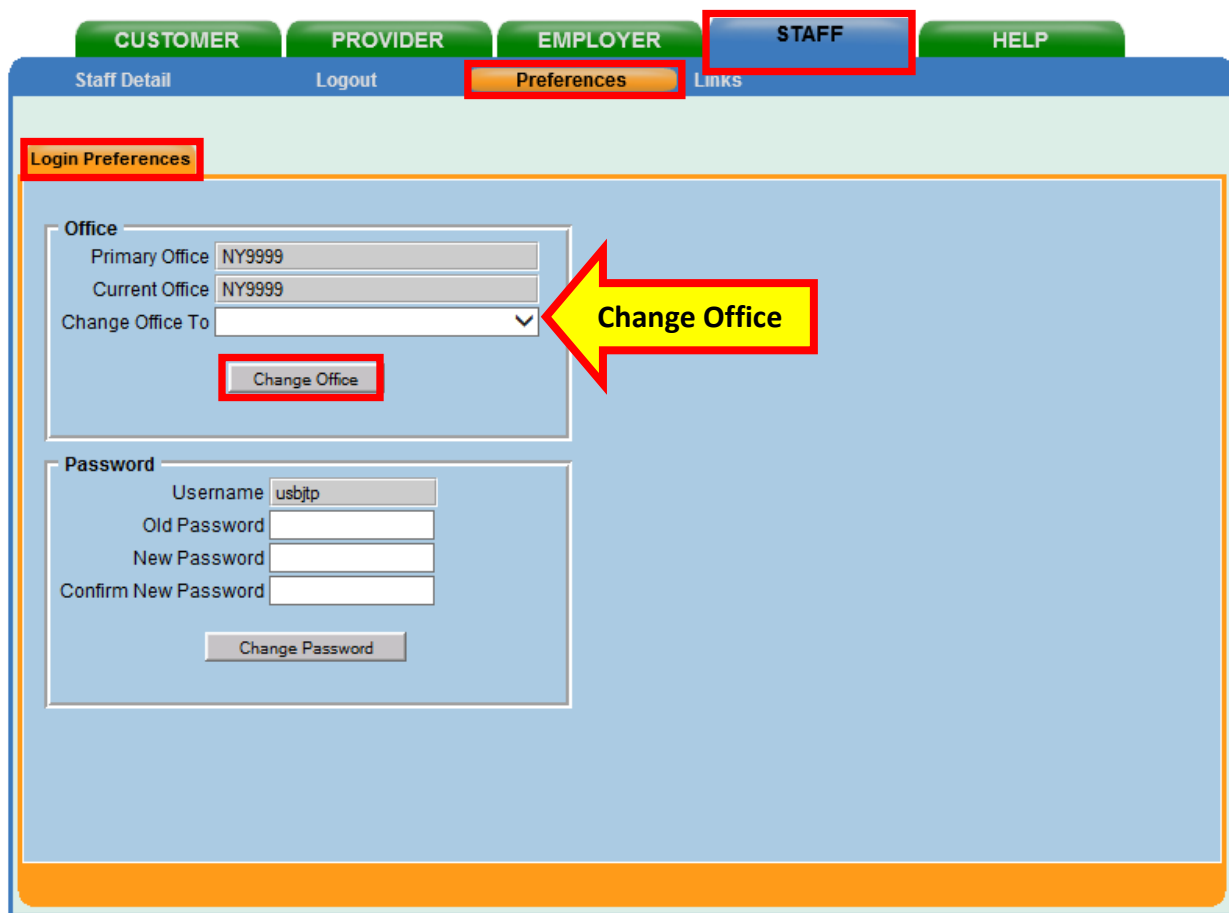
Training services under the Trade Act are not required to be listed on the Eligible Training Provider List (ETPL).

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.



The screenshot shows the OSOS Staff Preferences window. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The STAFF tab is selected. Below the tabs are sub-tabs: Staff Detail, Logout, Preferences, and Links. The Preferences tab is selected, and the Login Preferences sub-tab is active. The Login Preferences section contains two main areas: Office and Password. The Office section has three input fields: Primary Office (NY9999), Current Office (NY9999), and Change Office To (a dropdown menu). A red box highlights the Change Office To dropdown, and a yellow arrow points to it with the text "Change Office". Below the dropdown is a "Change Office" button, also highlighted with a red box. The Password section has four input fields: Username (usbjtp), Old Password, New Password, and Confirm New Password. Below these fields is a "Change Password" button.

FINDING THE CUSTOMER RECORD TO ADD A TAA SERVICE

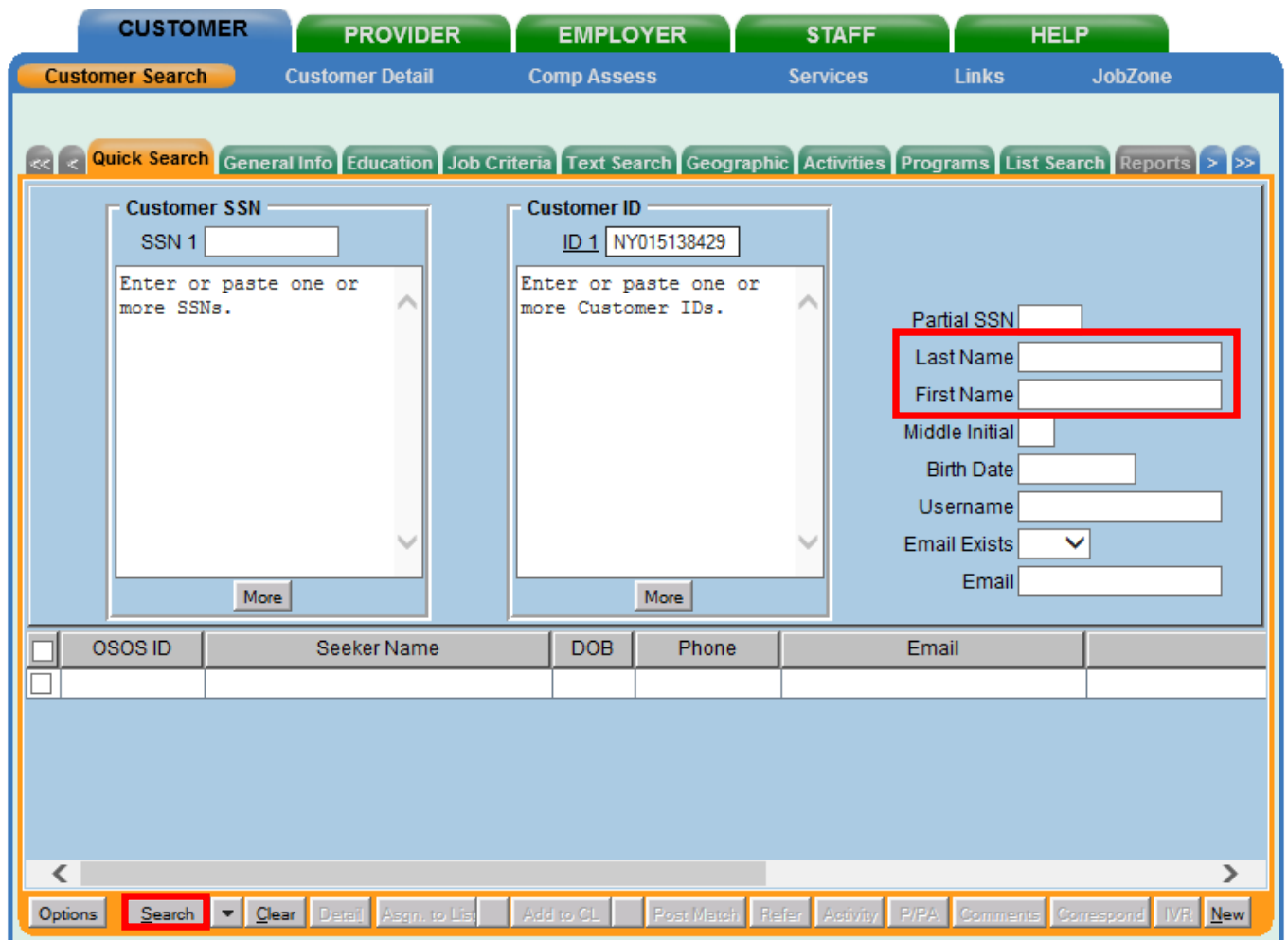
DISTANCE AND CLASSROOM TRAINING

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



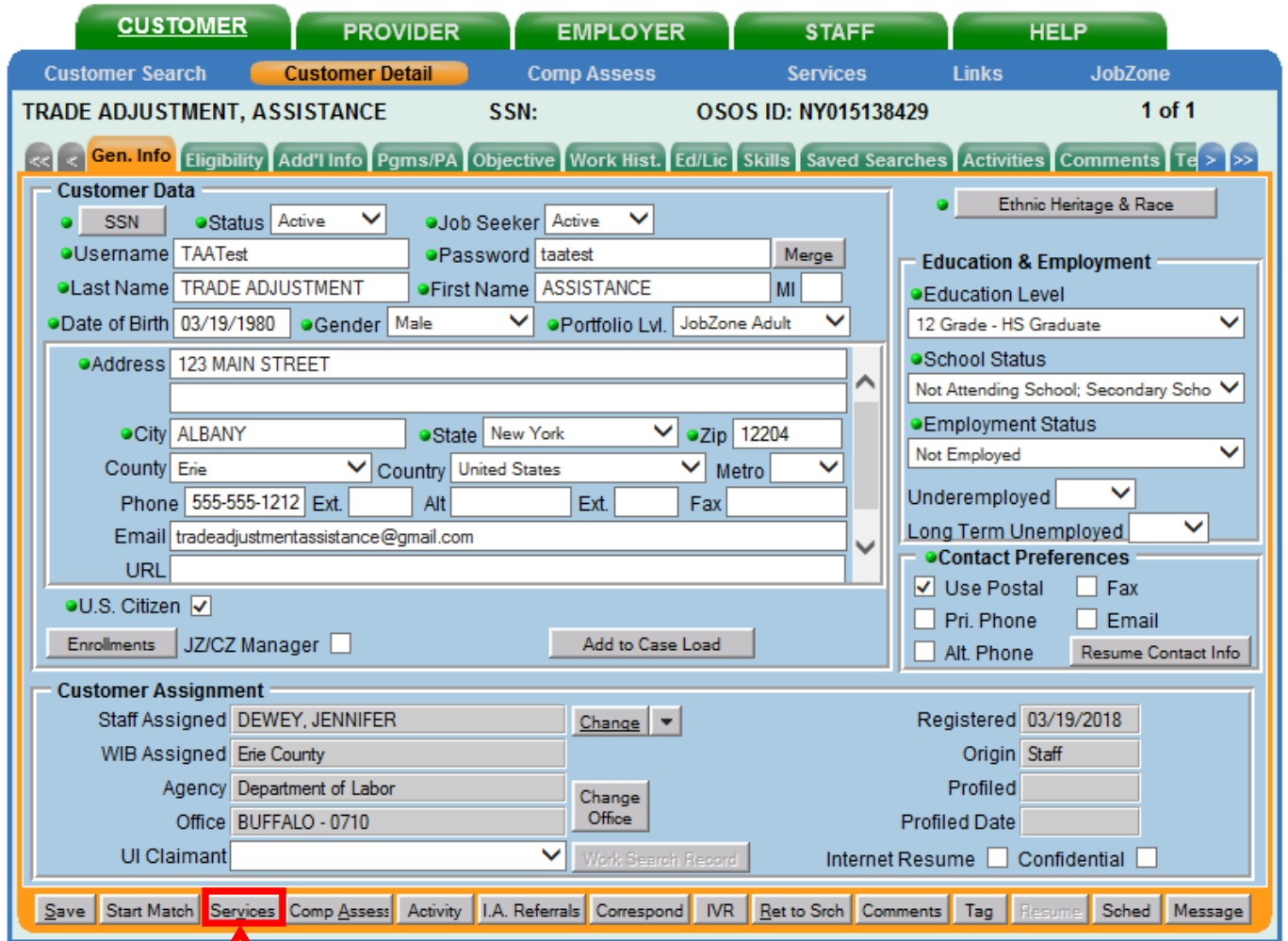
Enter separate training services when different providers are involved (i.e. a remedial provider and an occupational training provider). Do not enter separate training services for separate semesters or separate courses.

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.



The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'Quick Search' sub-tab is selected, showing various search filters like General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The main search area contains several input fields: Customer SSN (with a 'More' button), Customer ID (with 'ID 1' and 'NY015138429' entered, and a 'More' button), Partial SSN, Last Name, First Name (both highlighted with a red box), Middle Initial, Birth Date, Username, Email Exists (dropdown), and Email. Below the search fields is a table with columns for OSOS ID, Seeker Name, DOB, Phone, and Email. At the bottom, there is a toolbar with buttons for Options, Search (highlighted with a red box), Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

From the customer record, click the **Services** button to navigate to the **Services** window.



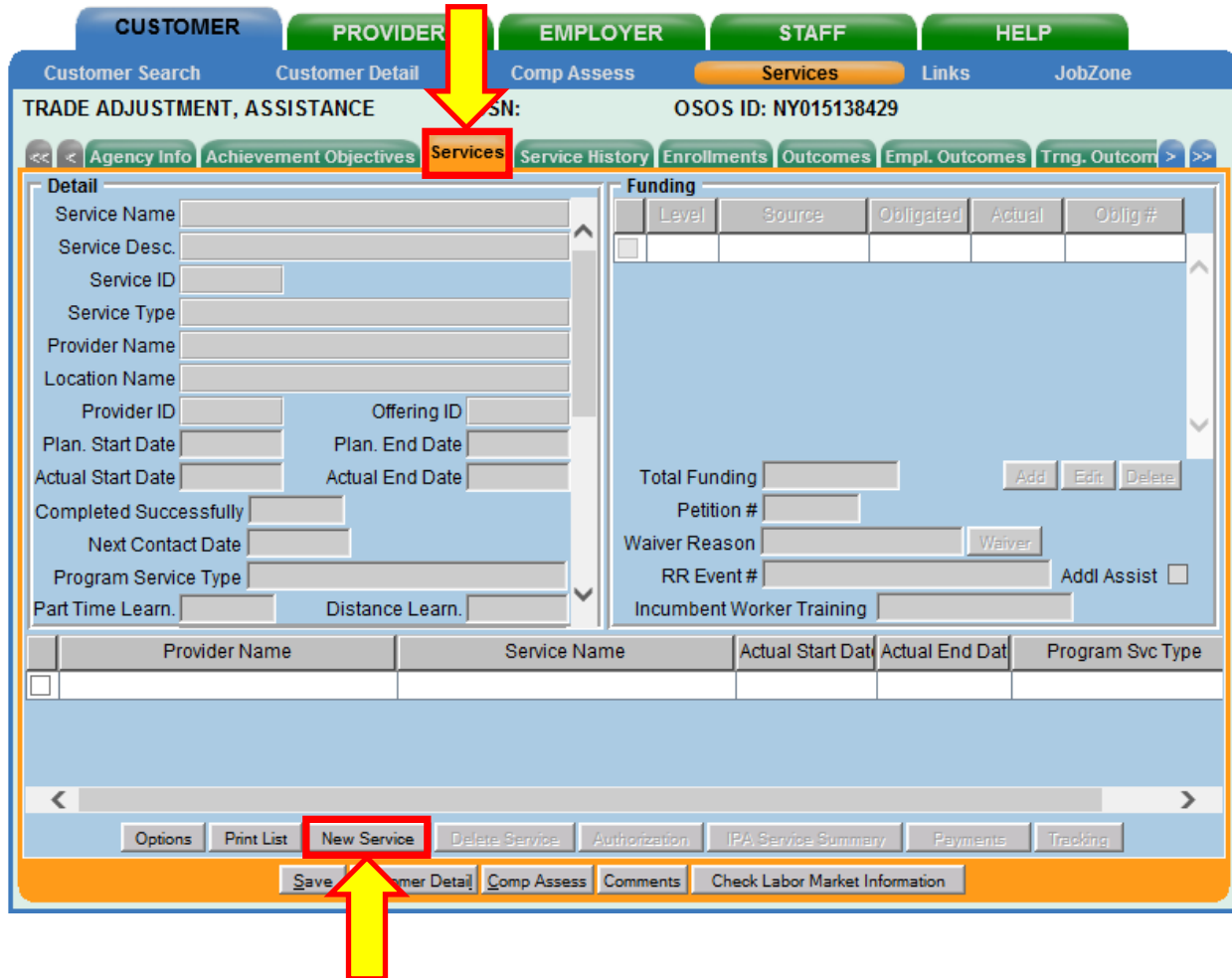
The screenshot shows the OSOS Customer Detail window for a customer named 'TRADE ADJUSTMENT, ASSISTANCE'. The window is divided into several sections:

- Customer Data:** Includes fields for SSN, Status (Active), Job Seeker (Active), Username (TAATest), Password (taatest), Last Name (TRADE ADJUSTMENT), First Name (ASSISTANCE), Date of Birth (03/19/1980), Gender (Male), Portfolio Lvl. (JobZone Adult), Address (123 MAIN STREET), City (ALBANY), State (New York), Zip (12204), County (Erie), Country (United States), Metro, Phone (555-555-1212), Email (tradeadjustmentassistance@gmail.com), and U.S. Citizen (checked).
- Customer Assignment:** Includes fields for Staff Assigned (DEWEY, JENNIFER), WIB Assigned (Erie County), Agency (Department of Labor), Office (BUFFALO - 0710), and UI Claimant.
- Education & Employment:** Includes fields for Education Level (12 Grade - HS Graduate), School Status (Not Attending School; Secondary Scho), Employment Status (Not Employed), Underemployed, and Long Term Unemployed.
- Contact Preferences:** Includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone.

The bottom navigation bar contains buttons for Save, Start Match, **Services** (highlighted with a red box and a yellow arrow), Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

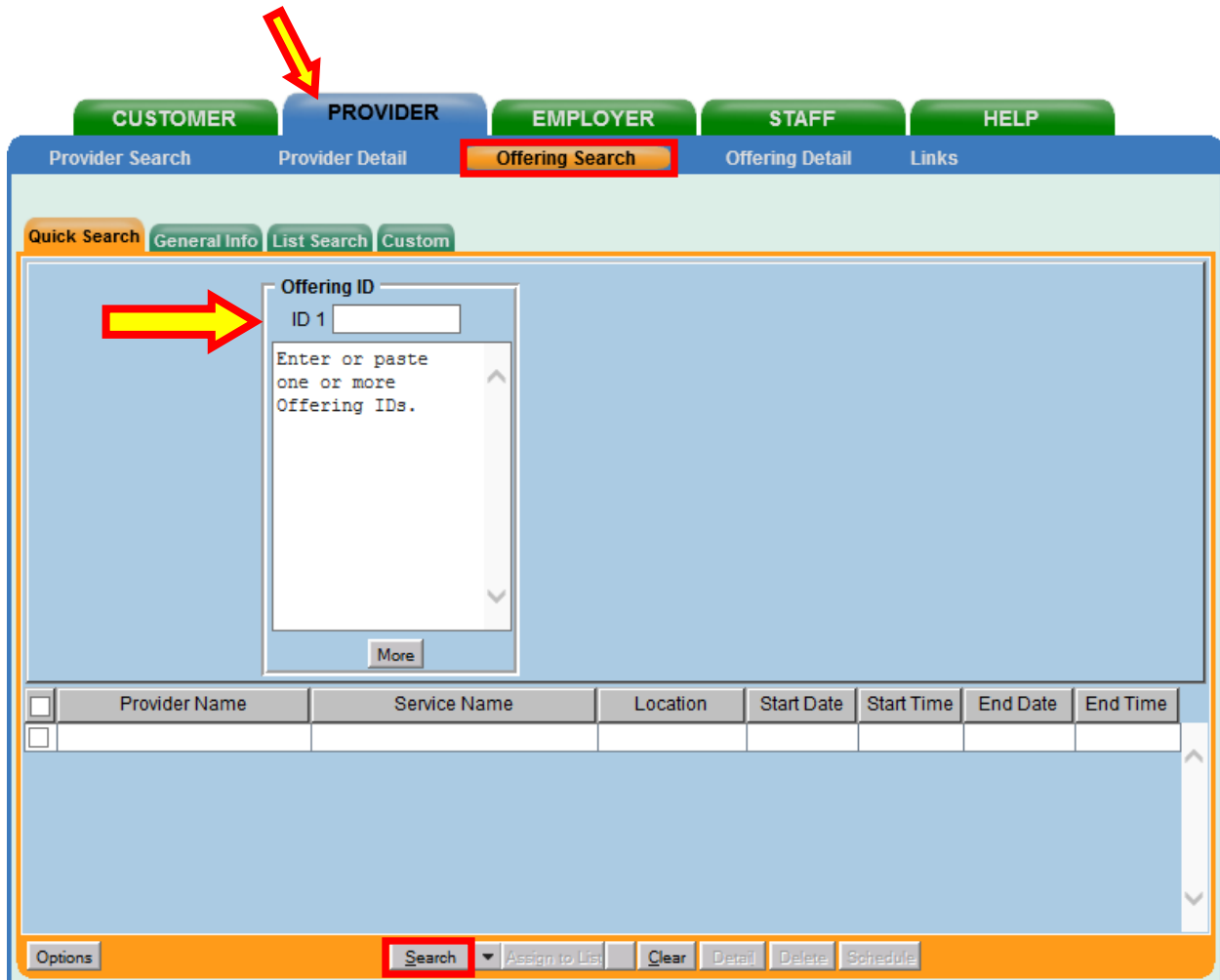
ENTERING A TRAINING SERVICE FOR A TAA PARTICIPANT

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.



The screenshot shows the OSOS interface for entering a training service. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The main window title is 'TRADE ADJUSTMENT, ASSISTANCE' with OSOS ID: NY015138429. The 'Services' tab is selected and highlighted with a red box and a yellow arrow pointing to it from above. The 'Detail' section contains various input fields for service information, including Service Name, Service Desc., Service ID, Service Type, Provider Name, Location Name, Provider ID, Offering ID, Plan. Start Date, Plan. End Date, Actual Start Date, Actual End Date, Completed Successfully, Next Contact Date, Program Service Type, Part Time Learn., and Distance Learn. The 'Funding' section includes a table with columns for Level, Source, Obligated, Actual, and Oblig #, and fields for Total Funding, Petition #, Waiver Reason, RR Event #, and Incumbent Worker Training. At the bottom of the screen, the 'New Service' button is highlighted with a red box and a yellow arrow pointing to it from below.

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.

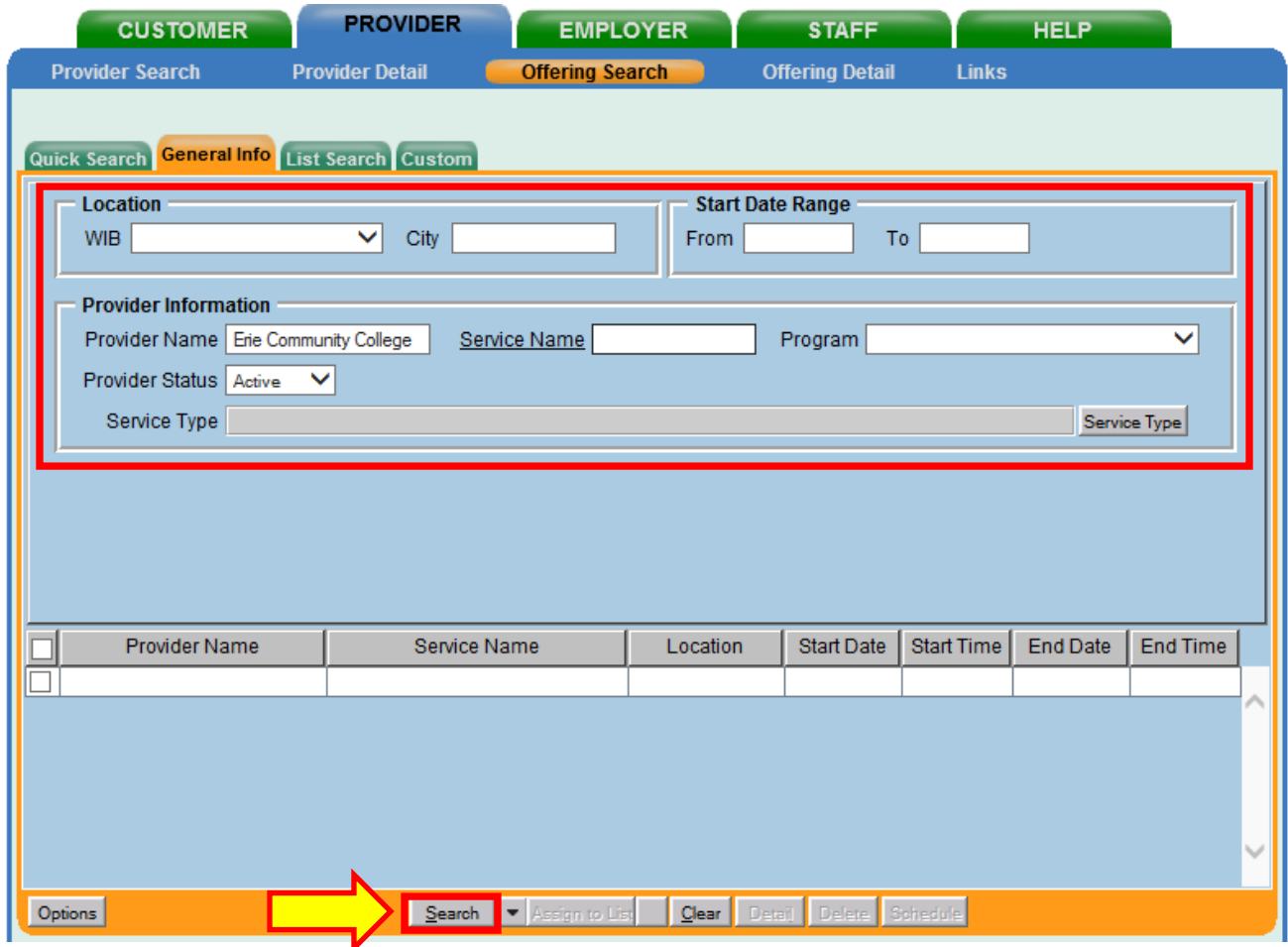


The screenshot shows the OSOS interface with the following elements:

- Top navigation: CUSTOMER, **PROVIDER**, EMPLOYER, STAFF, HELP
- Sub-navigation: Provider Search, Provider Detail, **Offering Search**, Offering Detail, Links
- Quick Search tabs: **Quick Search**, General Info, List Search, Custom
- Form fields:
 - Offering ID: ID 1
 - Text area: Enter or paste one or more Offering IDs.
 - More button
- Table:

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>							
- Bottom toolbar: Options, **Search**, Assign to List, Clear, Detail, Delete, Schedule

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.



CUSTOMER PROVIDER EMPLOYER STAFF HELP
 Provider Search Provider Detail **Offering Search** Offering Detail Links
 Quick Search **General Info** List Search Custom
 Location WIB City Start Date Range From To
 Provider Information
 Provider Name Service Name Program
 Provider Status Service Type

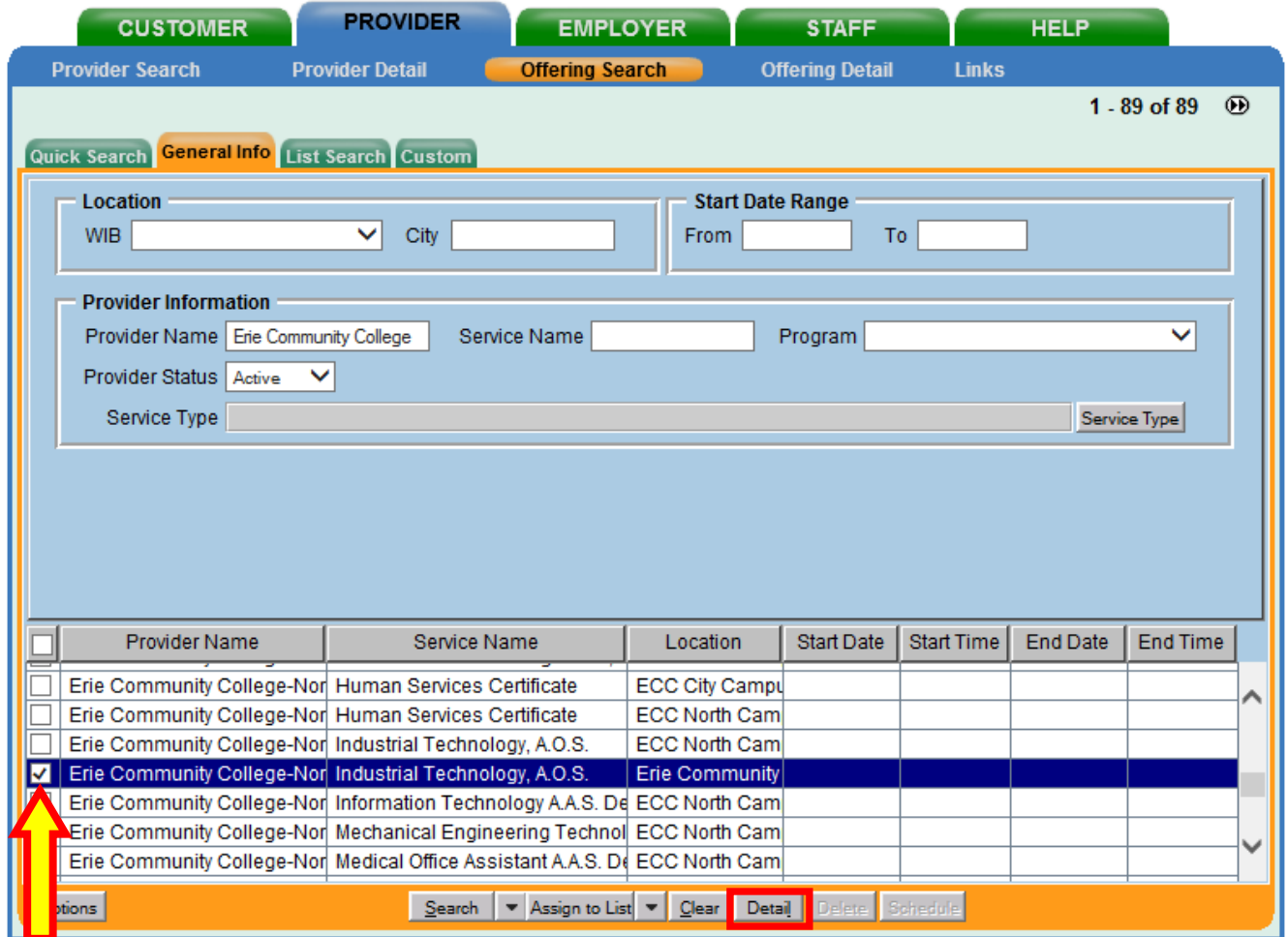
<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>							

 Options **Search** Assign to List Clear Detail Delete Schedule



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.



Provider Search Provider Detail **Offering Search** Offering Detail Links

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Quick Search **General Info** List Search Custom

Location: WIB [v] City [] Start Date Range: From [] To []

Provider Information:

Provider Name: Erie Community College Service Name: [] Program: [v]

Provider Status: Active [v]

Service Type: [] Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	Erie Community College-Nor	Human Services Certificate	ECC City Campu				
<input type="checkbox"/>	Erie Community College-Nor	Human Services Certificate	ECC North Cam				
<input type="checkbox"/>	Erie Community College-Nor	Industrial Technology, A.O.S.	ECC North Cam				
<input checked="" type="checkbox"/>	Erie Community College-Nor	Industrial Technology, A.O.S.	Erie Community				
<input type="checkbox"/>	Erie Community College-Nor	Information Technology A.A.S. De	ECC North Cam				
<input type="checkbox"/>	Erie Community College-Nor	Mechanical Engineering Technol	ECC North Cam				
<input type="checkbox"/>	Erie Community College-Nor	Medical Office Assistant A.A.S. D	ECC North Cam				

Options Search Assign to List Clear **Detail** Delete Schedule



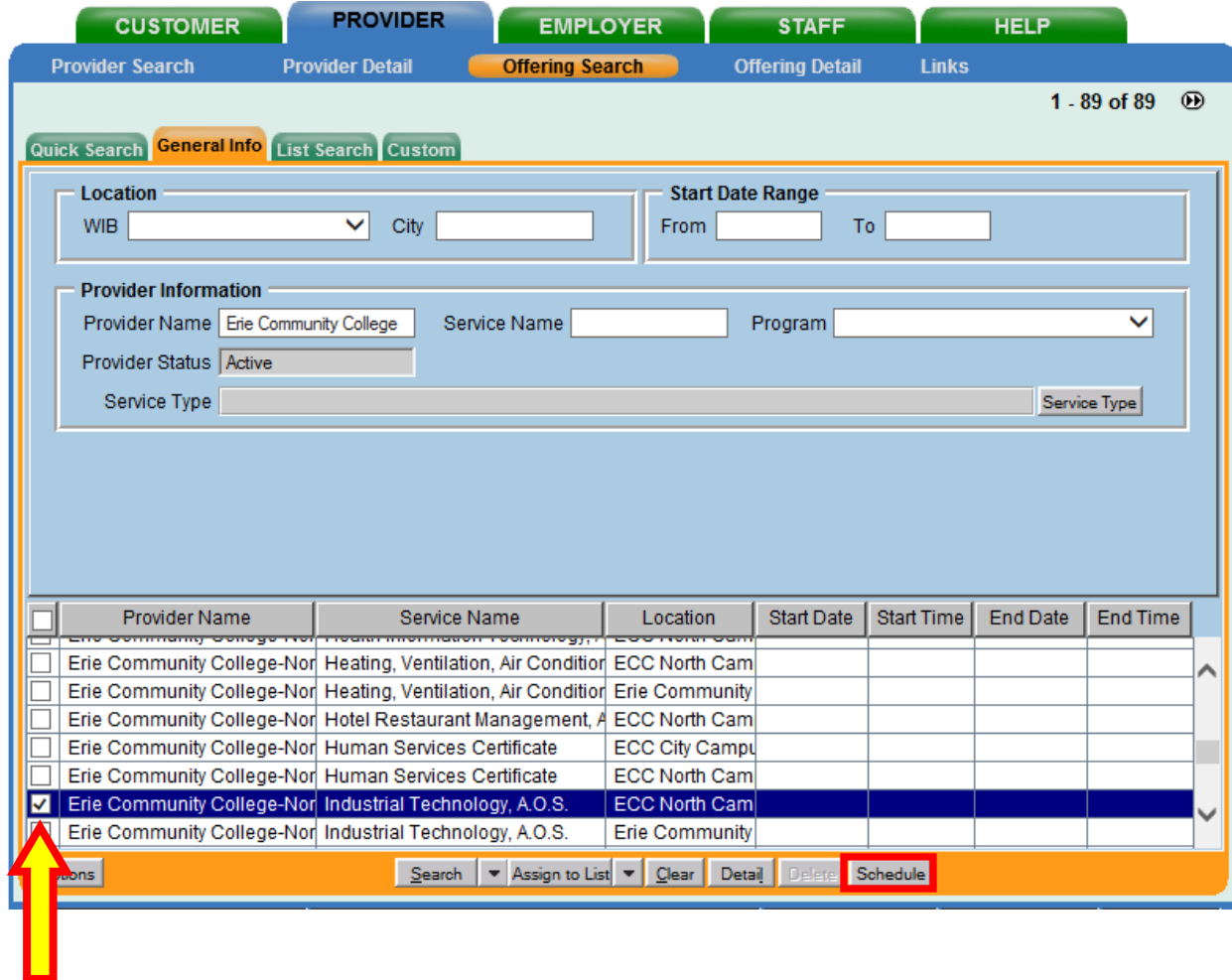
The system will navigate to the **Provider** module > **Offering Detail** window > **General Info** tab as shown below. If only one offering matches the search criteria, OSOS navigates directly to this screen.

Review the offering and click **Return to Search**. If a different offering is required, repeat the previous steps until the desired offering is found.

The screenshot shows the OSOS interface with the following details:

- Navigation:** CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, HELP
- Sub-navigation:** Provider Search, Provider Detail, Offering Search, Offering Detail (selected), Links
- Header:** Industrial Technology, A.O.S. Offering ID: 110438 1 of 1
- General Info Tab:** Lists, Attachments
- Provider Info:**
 - Provider Name: Erie Community College-North
 - Service Category: Occupational Skills Training Element
 - Service Type: Occupational Skills Training
 - Service Description: ETP Auto load 10/24/2016
 - Pay for Performance: No
 - ETP Status: [Empty]
- Location:**
 - Location: Erie Community College-North
 - Address: 6205 MAIN ST
 - City: WILLIAMSVILLE State: New York
 - Zip: 14221 WIB: Erie County
- Schedule:**
 - Start Date: [Empty] End Date: [Empty]
 - Start Time: [Empty] End Time: [Empty]
 - Sun: Mon: Tue: Wed: Thu: Fri: Sat:
- ETP Program of Study Leading to:**
 - Industry Recognized Certification
 - Registered Apprenticeship
 - State or National License
 - Associate Degree
 - Bachelor's Degree
 - Community College Certificate
 - Secondary School Diploma or Equivalent
 - Employment
 - Measurable Skill Gain
- Additional Info:**
 - Cost: \$ 1.00 Total Seats: 9999 Available Seats: 9989
 - Description: [Empty text area]
- Buttons:** Save Single, Save Ongoing, Provider Services, Return to Search (highlighted in red)

When the appropriate offering is identified, check the corresponding box to highlight the offering and click **Schedule**.



Provider Search Provider Detail **Offering Search** Offering Detail Links

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Quick Search **General Info** List Search Custom

Location: WIB [dropdown] City [input] Start Date Range: From [input] To [input]

Provider Information:

Provider Name: Erie Community College Service Name: [input] Program: [dropdown]

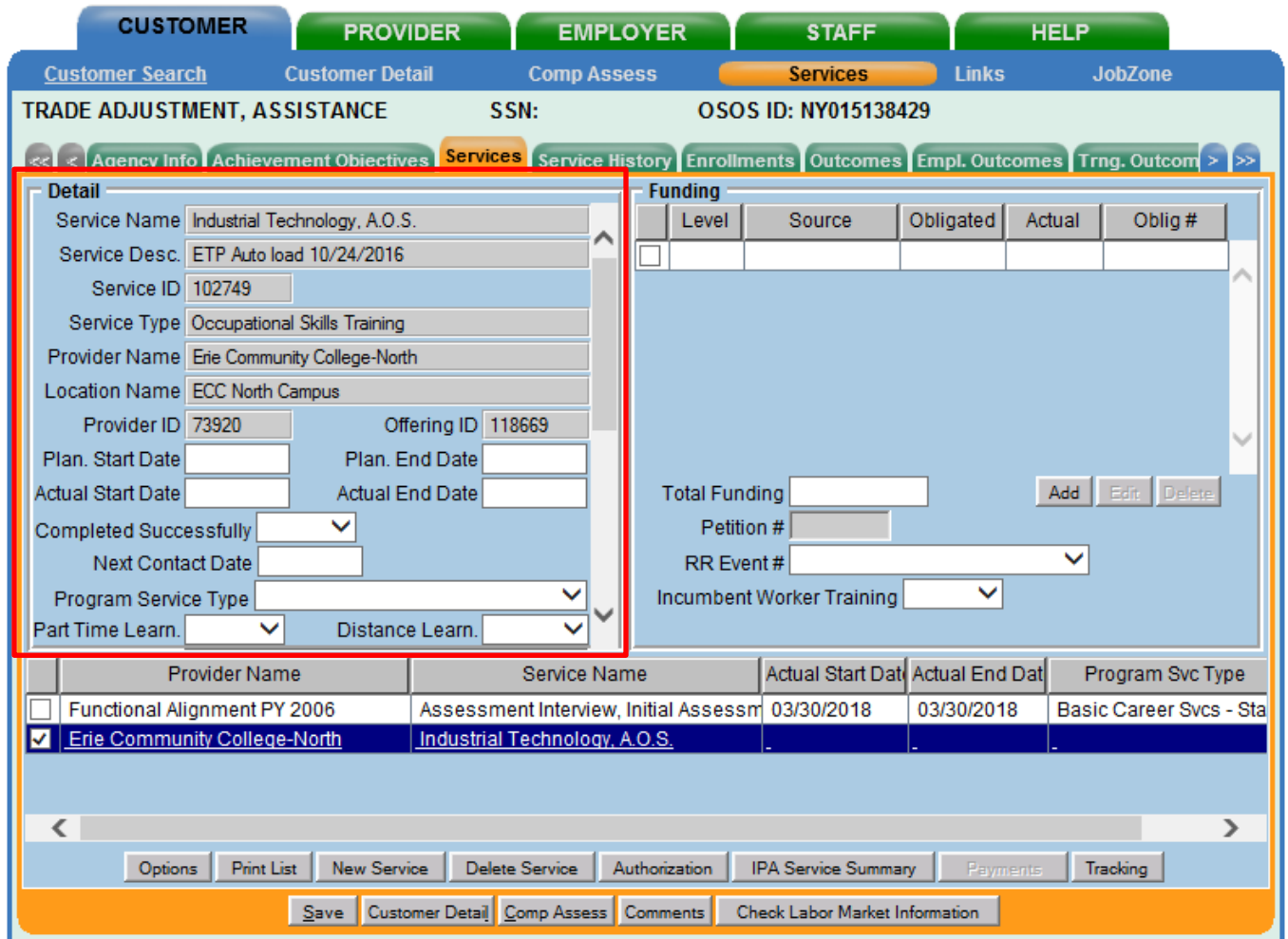
Provider Status: Active

Service Type: [input] Service Type [button]

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	Erie Community College-Nor	Health Information Technology, A	ECC North Cam				
<input type="checkbox"/>	Erie Community College-Nor	Heating, Ventilation, Air Condition	ECC North Cam				
<input type="checkbox"/>	Erie Community College-Nor	Heating, Ventilation, Air Condition	Erie Community				
<input type="checkbox"/>	Erie Community College-Nor	Hotel Restaurant Management, A	ECC North Cam				
<input type="checkbox"/>	Erie Community College-Nor	Human Services Certificate	ECC City Campu				
<input type="checkbox"/>	Erie Community College-Nor	Human Services Certificate	ECC North Cam				
<input checked="" type="checkbox"/>	Erie Community College-Nor	Industrial Technology, A.O.S.	ECC North Cam				
<input type="checkbox"/>	Erie Community College-Nor	Industrial Technology, A.O.S.	Erie Community				

Search Assign to List Clear Detail Delete **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 screenshot shows the OSOS interface with the 'Services' tab selected. The 'Detail' section is highlighted with a red box and contains the following information:

- Service Name: Industrial Technology, A.O.S.
- Service Desc.: ETP Auto load 10/24/2016
- Service ID: 102749
- Service Type: Occupational Skills Training
- Provider Name: Erie Community College-North
- Location Name: ECC North Campus
- Provider ID: 73920
- Offering ID: 118669
- Plan. Start Date: [Empty]
- Plan. End Date: [Empty]
- Actual Start Date: [Empty]
- Actual End Date: [Empty]
- Completed Successfully: [Dropdown]
- Next Contact Date: [Empty]
- Program Service Type: [Dropdown]
- Part Time Learn.: [Dropdown]
- Distance Learn.: [Dropdown]

The 'Funding' section includes a table with columns: Level, Source, Obligated, Actual, and Oblig #. Below the table are fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Training.

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Buttons at the bottom include: Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments, and Check Labor Market Information.



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.

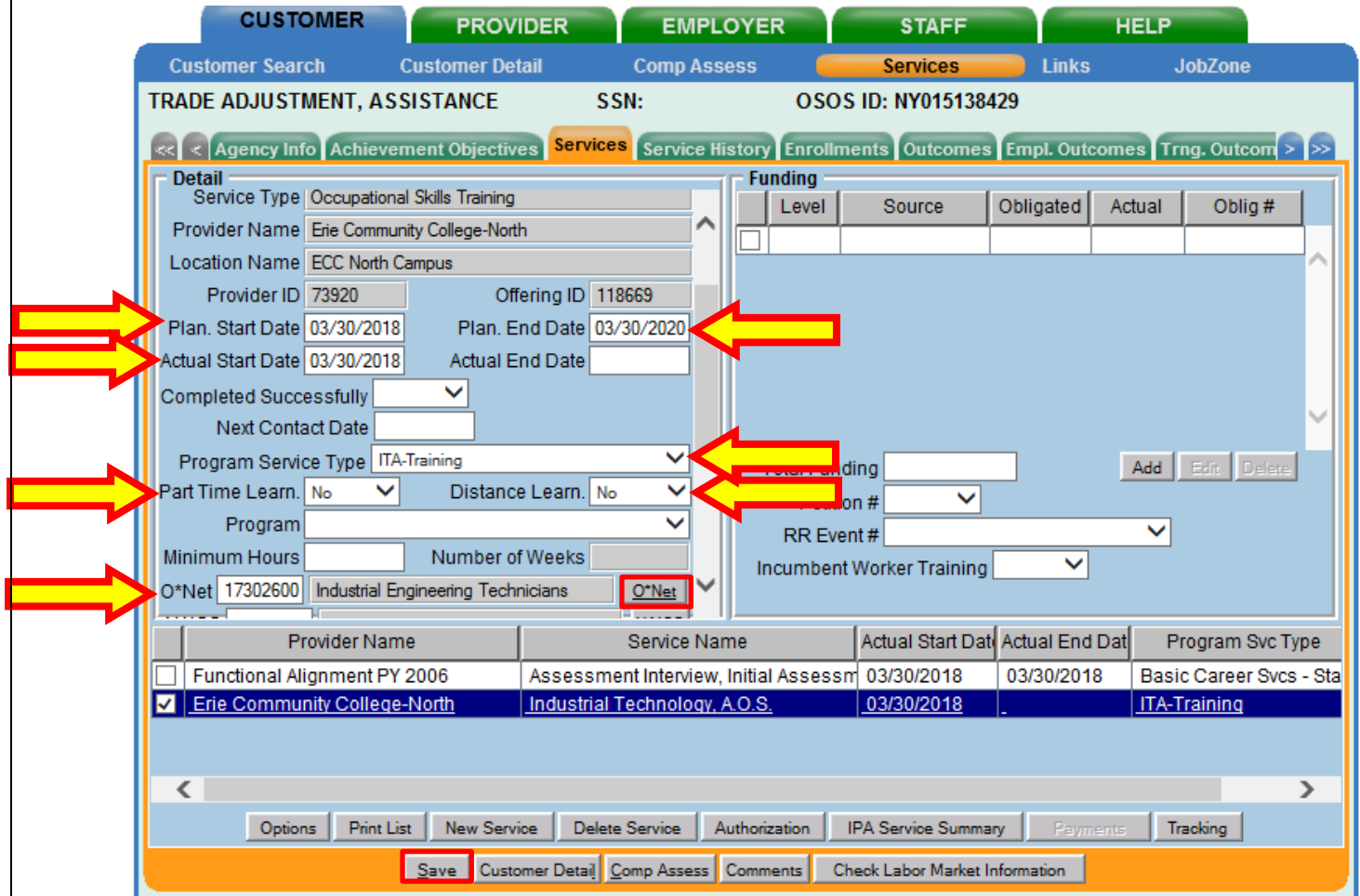
Note: The Application Date will always be on or before the Eligibility Determination Date.

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**.



TRADE ADJUSTMENT, ASSISTANCE SSN: OSOS ID: NY015138429

Agency Info | Achievement Objectives | **Services** | Service History | Enrollments | Outcomes | Empl. Outcomes | Trng. Outcom

Detail

Service Type: Occupational Skills Training
 Provider Name: Erie Community College-North
 Location Name: ECC North Campus
 Provider ID: 73920 Offering ID: 118669
 Plan. Start Date: 03/30/2018 Plan. End Date: 03/30/2020
 Actual Start Date: 03/30/2018 Actual End Date:
 Completed Successfully:
 Next Contact Date:
 Program Service Type: ITA-Training
 Part Time Learn.: No Distance Learn.: No
 Program:
 Minimum Hours: Number of Weeks:
 O*Net: 17302600 Industrial Engineering Technicians O*Net

Funding

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

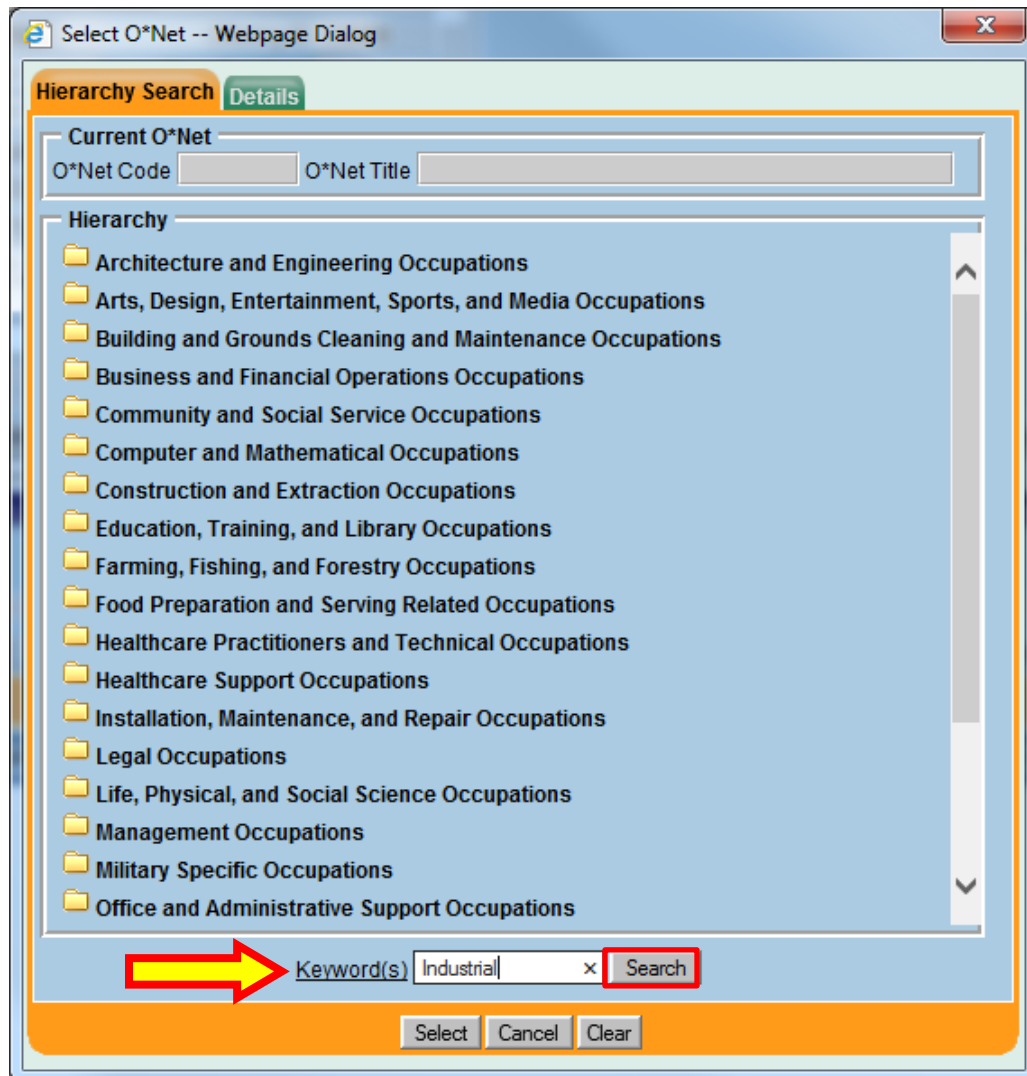
	Provider Name	Service Name	Actual Start Dat	Actual End Dat	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2018	03/30/2018	Basic Career Svcs - Sta
<input checked="" type="checkbox"/>	Erie Community College-North	Industrial Technology, A.O.S.	03/30/2018	.	ITA-Training

Options | Print List | New Service | Delete Service | Authorization | IPA Service Summary | Payments | Tracking

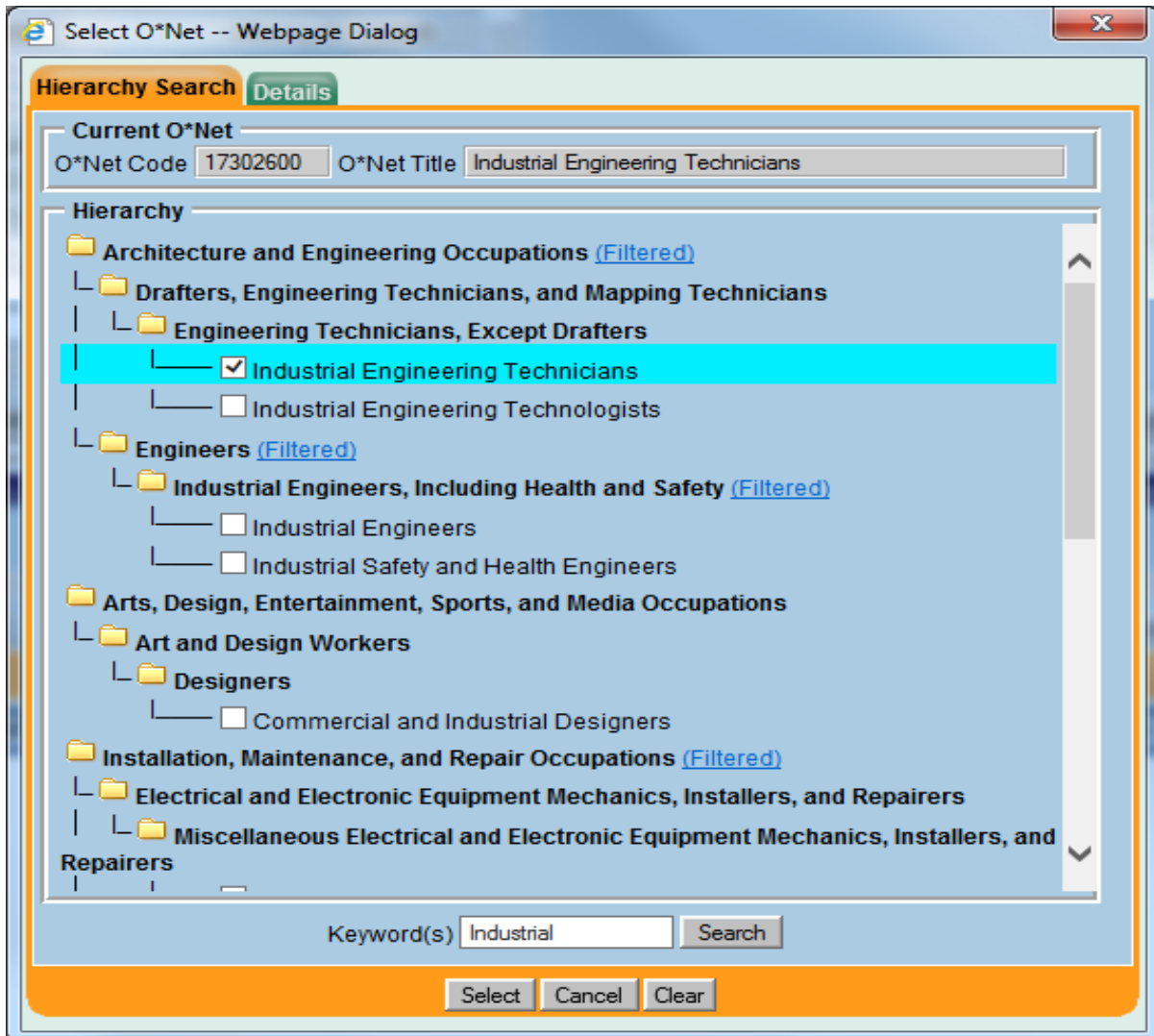
Save | Customer Detail | Comp Assess | Comments | Check Labor Market Information

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**.



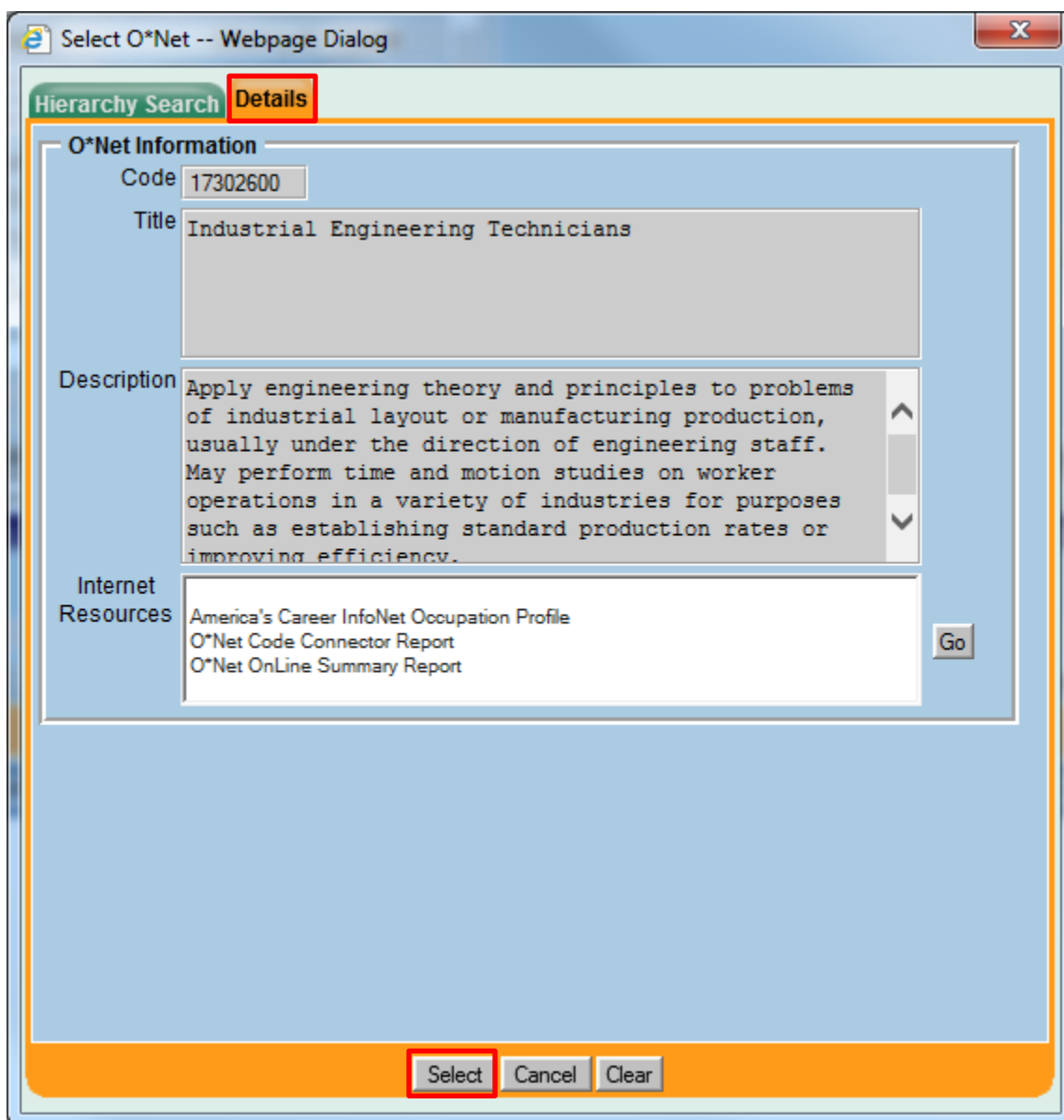
Use the scroll bar to view all O*Net Titles containing the keyword. Check the box of the appropriate O*Net Title.



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.



The screenshot shows a web browser dialog window titled "Select O*Net -- Webpage Dialog". It has two tabs: "Hierarchy Search" and "Details", with "Details" selected. The "O*Net Information" section displays the following details:

- Code:** 17302600
- Title:** Industrial Engineering Technicians
- Description:** Apply engineering theory and principles to problems of industrial layout or manufacturing production, usually under the direction of engineering staff. May perform time and motion studies on worker operations in a variety of industries for purposes such as establishing standard production rates or improving efficiency.
- Internet Resources:** America's Career InfoNet Occupation Profile, O*Net Code Connector Report, O*Net OnLine Summary Report. A "Go" button is located to the right of these resources.

At the bottom of the dialog, there are three buttons: "Select", "Cancel", and "Clear". The "Select" button is highlighted with a red box.



Upon selection of the O*Net Title, the system returns to the **Customer** module > **Services** window > **Services** tab. Click **Save**.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

TRADE ADJUSTMENT, ASSISTANCE SSN: OSOS ID: NY015138429

<< < Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom > >>

Detail

Service Type: Occupational Skills Training

Provider Name: Erie Community College-North

Location Name: ECC North Campus

Provider ID: 73920 Offering ID: 118669

Plan. Start Date: 03/30/2018 Plan. End Date: 03/30/2020

Actual Start Date: 03/30/2018 Actual End Date:

Completed Successfully:

Next Contact Date:

Program Service Type: ITA-Training

Part Time Learn.: No Distance Learn.: No

Program:

Minimum Hours: Number of Weeks:

O*Net: 17302600 Industrial Engineering Technicians O*Net

Funding

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Total Funding: Add Edit Delete

Petition #:

RR Event #:

Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2018	03/30/2018	Basic Career Svcs - Sta
<input checked="" type="checkbox"/>	Erie Community College-North	Industrial Technology, A.O.S.	03/30/2018	.	ITA-Training

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

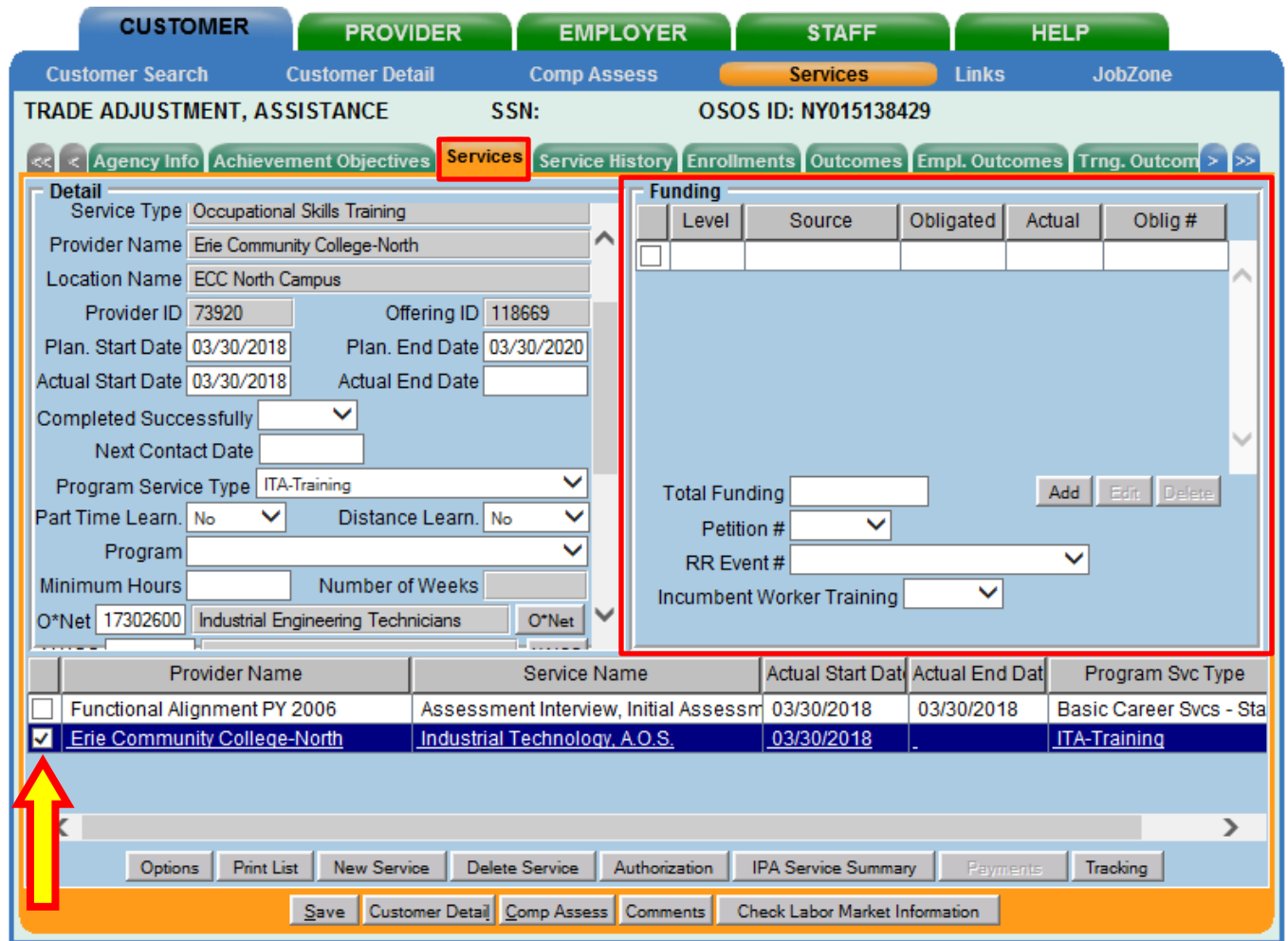
Save Customer Detail Comp Assess Comments Check Labor Market Information

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.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

TRADE ADJUSTMENT, ASSISTANCE SSN: OSOS ID: NY015138429

Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom

Detail

Service Type: Occupational Skills Training
 Provider Name: Erie Community College-North
 Location Name: ECC North Campus
 Provider ID: 73920 Offering ID: 118669
 Plan. Start Date: 03/30/2018 Plan. End Date: 03/30/2020
 Actual Start Date: 03/30/2018 Actual End Date:
 Completed Successfully:
 Next Contact Date:
 Program Service Type: ITA-Training
 Part Time Learn.: No Distance Learn.: No
 Program:
 Minimum Hours: Number of Weeks:
 O*Net: 17302600 Industrial Engineering Technicians O*Net:

Funding

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Total Funding: Add Edit Delete
 Petition #:
 RR Event #:
 Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2018	03/30/2018	Basic Career Svcs - Sta
<input checked="" type="checkbox"/>	Erie Community College-North	Industrial Technology, A.O.S.	03/30/2018	.	ITA-Training

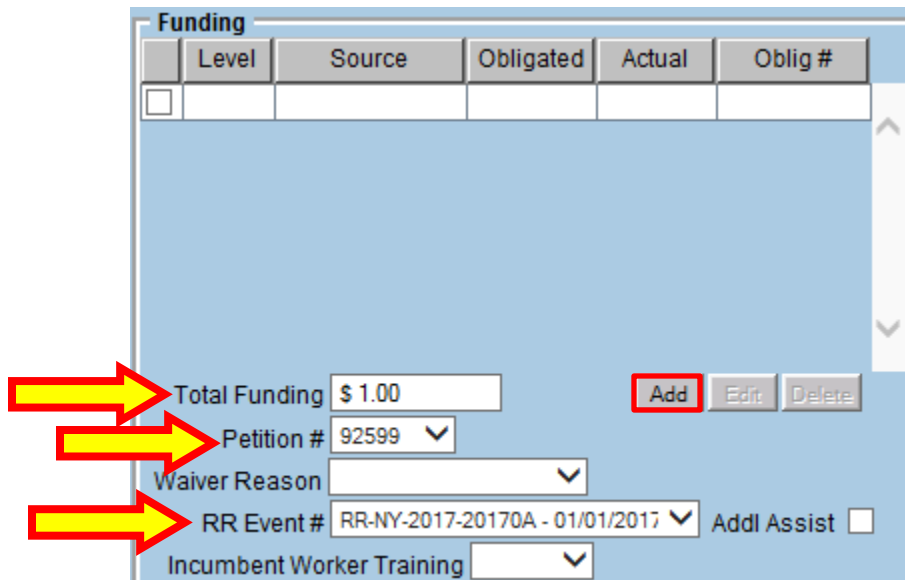
Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save Customer Detail Comp Assess Comments Check Labor Market Information

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.



The screenshot shows the 'Funding' form with the following fields and values:

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Below the table, the form fields are:

- Total Funding: \$ 1.00
- Petition #: 92599
- Waiver Reason: (empty)
- RR Event #: RR-NY-2017-20170A - 01/01/2017
- Incumbent Worker Training: (empty)

Buttons: Add, Edit, Delete. The 'Add' button is highlighted with a red box. Three red arrows point to the Total Funding, Petition #, and RR Event # fields.



*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.

Funding -- Webpage Dialog

Funding

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	State	Workforce Learning Link	2017	\$ 99997.00	1013
<input checked="" type="checkbox"/>	WIB	TAA	2017	\$ 100000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2017	\$ 99999.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2017	\$ 99999.00	
<input type="checkbox"/>	WIB	TAA	2016	\$ 9975.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2016	\$ 93557.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2016	\$ 95483.00	
<input type="checkbox"/>	State	WIRED	2015	\$ 9998.00	WR12
<input type="checkbox"/>	WIB	TAA	2015	\$ 9534.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2015	\$ 9998.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2015	\$ 9992.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2015	\$ 282.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2015	\$ 85075.00	

Obligated Amount OR Obligated Percentage

WIB
 Office
 Region



Click **Save**.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

TRADE ADJUSTMENT, ASSISTANCE SSN: OSOS ID: NY015138429

<< < Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom >>

Detail

Service Type: Occupational Skills Training

Provider Name: Erie Community College-North

Location Name: ECC North Campus

Provider ID: 73920 Offering ID: 118669

Plan. Start Date: 03/30/2018 Plan. End Date: 03/30/2020

Actual Start Date: 03/30/2018 Actual End Date:

Completed Successfully:

Next Contact Date:

Program Service Type: ITA-Training

Part Time Learn.: No Distance Learn.: No

Program:

Minimum Hours: Number of Weeks:

O*Net: 17302600 Industrial Engineering Technicians O*Net:

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB TAA	\$ 1.00	\$ 0.00	.

Total Funding: \$ 1.00 Add Edit Delete

Petition #: 92599

Waiver Reason:

RR Event #: RR-NY-2017-20170A - 01/01/2017 Addl Assist:

Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2018	03/30/2018	Basic Career Svcs - Sta
<input checked="" type="checkbox"/>	Erie Community College-North	Industrial Technology, A.O.S.	03/30/2018	.	ITA-Training

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

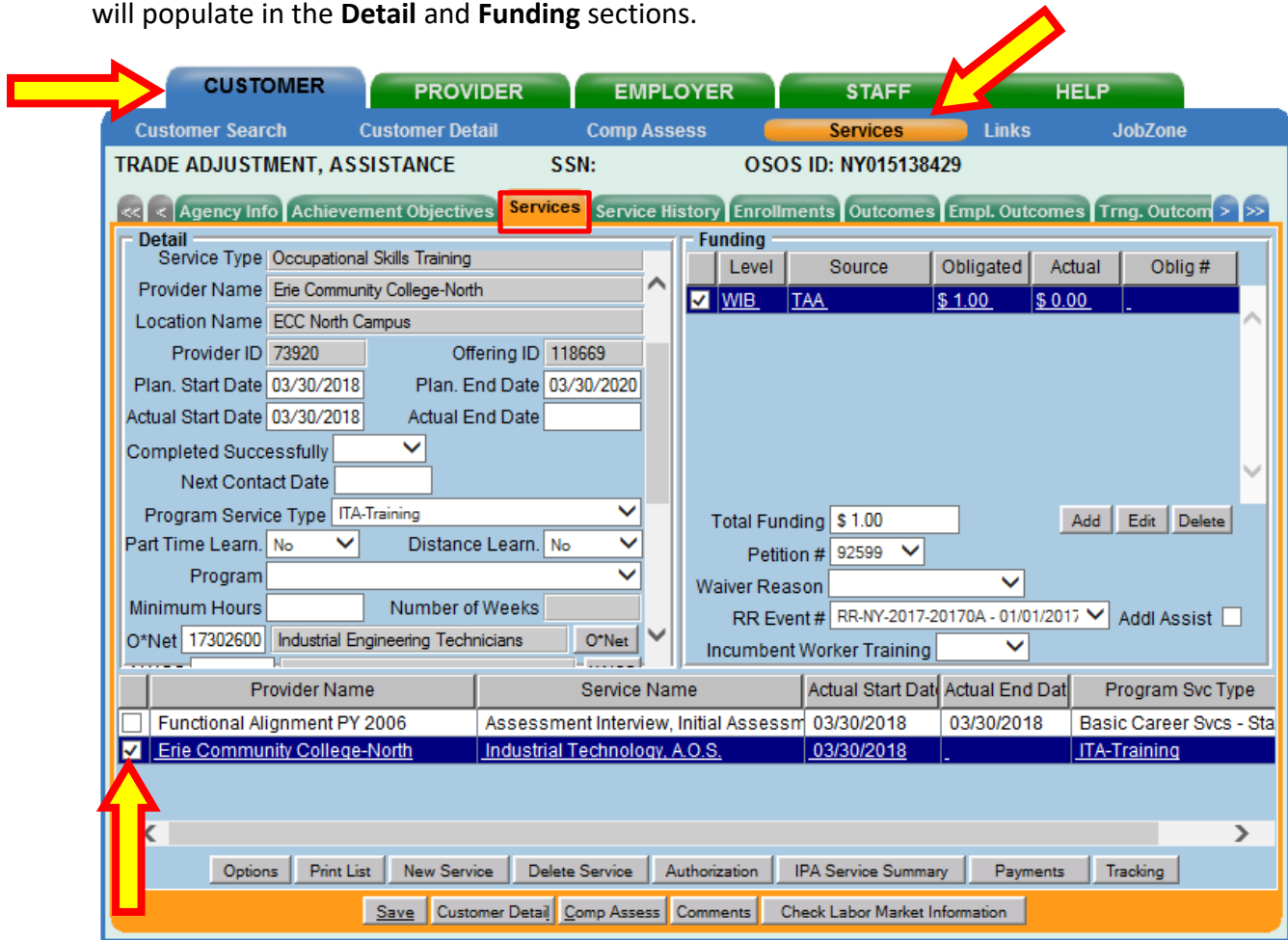
Save Customer Detail Comp Assess Comments Check Labor Market Information

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.



Customer **PROVIDER** **EMPLOYER** **STAFF** **HELP**

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

TRADE ADJUSTMENT, ASSISTANCE SSN: OSOS ID: NY015138429

Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom

Detail

Service Type Occupational Skills Training
Provider Name Erie Community College-North
Location Name ECC North Campus
Provider ID 73920 Offering ID 118669
Plan. Start Date 03/30/2018 Plan. End Date 03/30/2020
Actual Start Date 03/30/2018 Actual End Date
Completed Successfully
Next Contact Date
Program Service Type ITA-Training
Part Time Learn. No Distance Learn. No
Program
Minimum Hours Number of Weeks
O*Net 17302600 Industrial Engineering Technicians O*Net

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/> WIB	TAA	\$ 1.00	\$ 0.00	.

Total Funding \$ 1.00 Add Edit Delete
Petition # 92599
Waiver Reason
RR Event # RR-NY-2017-20170A - 01/01/2017 Addl Assist
Incumbent Worker Training

Provider Name	Service Name	Actual Start Dat	Actual End Dat	Program Svc Type
<input type="checkbox"/> Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2018	03/30/2018	Basic Career Svcs - Sta
<input checked="" type="checkbox"/> Erie Community College-North	Industrial Technology, A.O.S.	03/30/2018	.	ITA-Training

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save Customer Detail Comp Assess Comments Check Labor Market Information



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.

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**.

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

TRADE ADJUSTMENT, ASSISTANCE SSN: OSOS ID: NY015138429

Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom

Detail

Service Type: Occupational Skills Training
Provider Name: Erie Community College-North
Location Name: ECC North Campus
Provider ID: 73920 Offering ID: 118669
Plan. Start Date: 03/30/2018 Plan. End Date: 04/02/2018
Actual Start Date: 03/30/2018 Actual End Date: 04/02/2018
Completed Successfully: Yes
Next Contact Date:
Program Service Type: ITA-Training
Part Time Learn.: No Distance Learn.: No
Program:
Minimum Hours: Number of Weeks:
O*Net: 17302600 Industrial Engineering Technicians O*Net:
Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB TAA	\$ 1.00	\$ 0.00	.

Total Funding: \$ 1.00 Add Edit Delete
Petition #: 92599
Waiver Reason:
RR Event #: RR-NY-2017-20170A - 01/01/2017 Addl Assist:
Incumbent Worker Training:

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2018 03/30/2018	Basic Career Svcs - Sta
<input checked="" type="checkbox"/>	Erie Community College-North	Industrial Technology, A.O.S.	03/30/2018 04/02/2018	ITA-Training

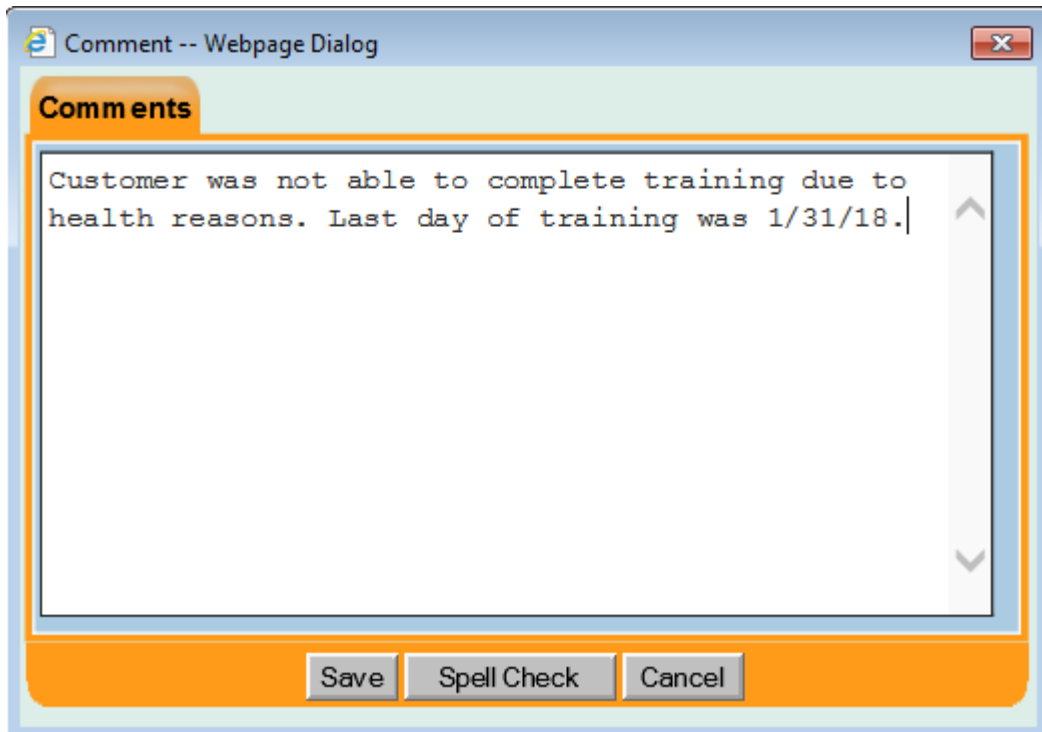
Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking
Save Customer Detail Comp Assess Comments Check Labor Market Information



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.



The screenshot shows a web browser dialog box titled "Comment -- Webpage Dialog". The dialog has a light blue header bar with a close button (X) in the top right corner. Below the header is a tab labeled "Comments". The main area of the dialog is a text input field with a light blue border and a vertical scrollbar on the right. The text inside the field reads: "Customer was not able to complete training due to health reasons. Last day of training was 1/31/18." Below the text field is an orange bar containing three buttons: "Save", "Spell Check", and "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