

Trade Adjustment Assistance - Entering OJT Services & Funding OSOS Guide



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PURPOSE

The TAA program offers customers various benefits. One of these benefits is training. Customers determined entitled to TAA can choose to take advantage of this benefit through On-The-Job Training (OJT).

TAA can be better connected with business needs and economic development using Employer Based Training (EBT), which may include OJT and customized training. According to the Code of Federal Regulations 617.24, On-The-Job Training is the preferred method of training for Trade Adjustment Assistance.

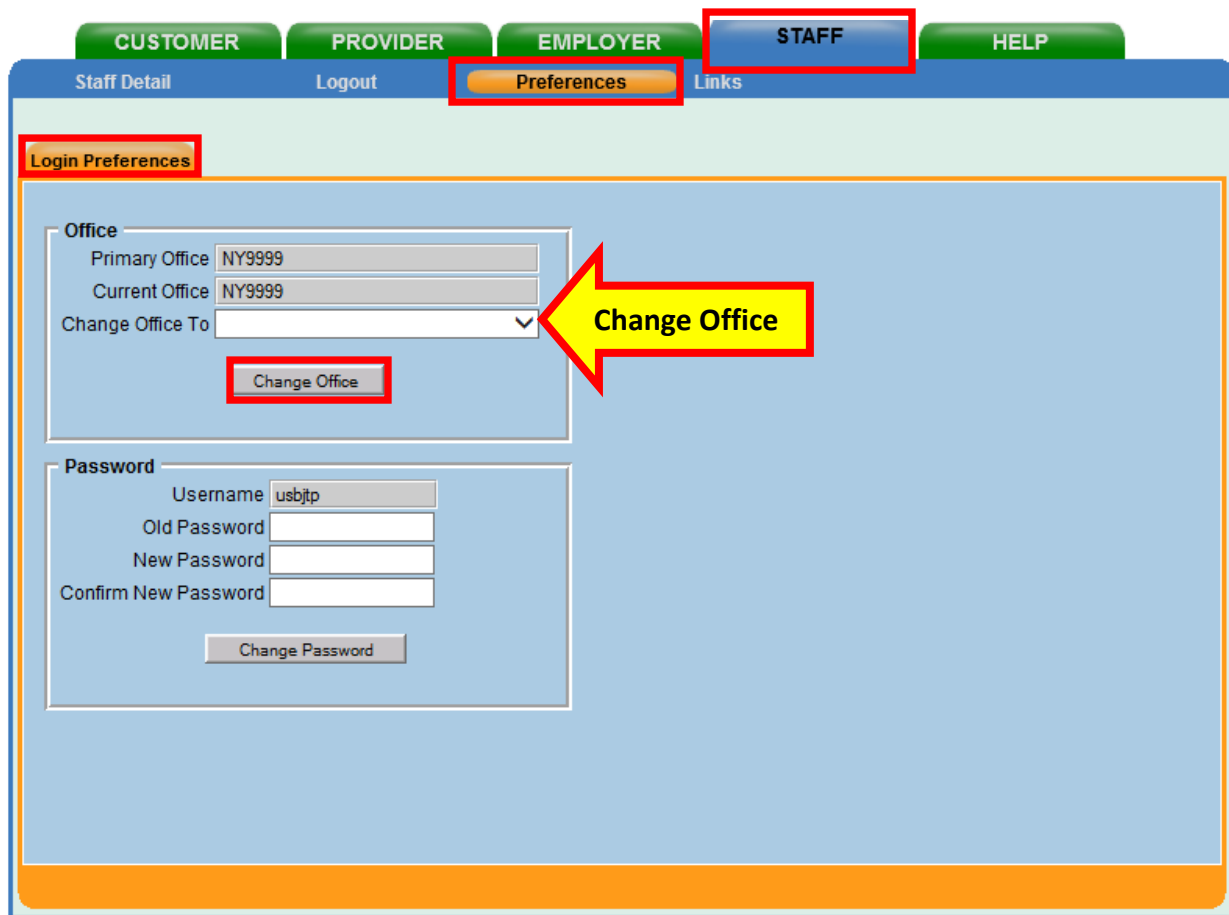
This guide provides comprehensive instructions for entering OJT Services for TAA participants in an approved OJT program. It will cover the OSOS data entry for adding, funding, and ending the OJT service.

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.

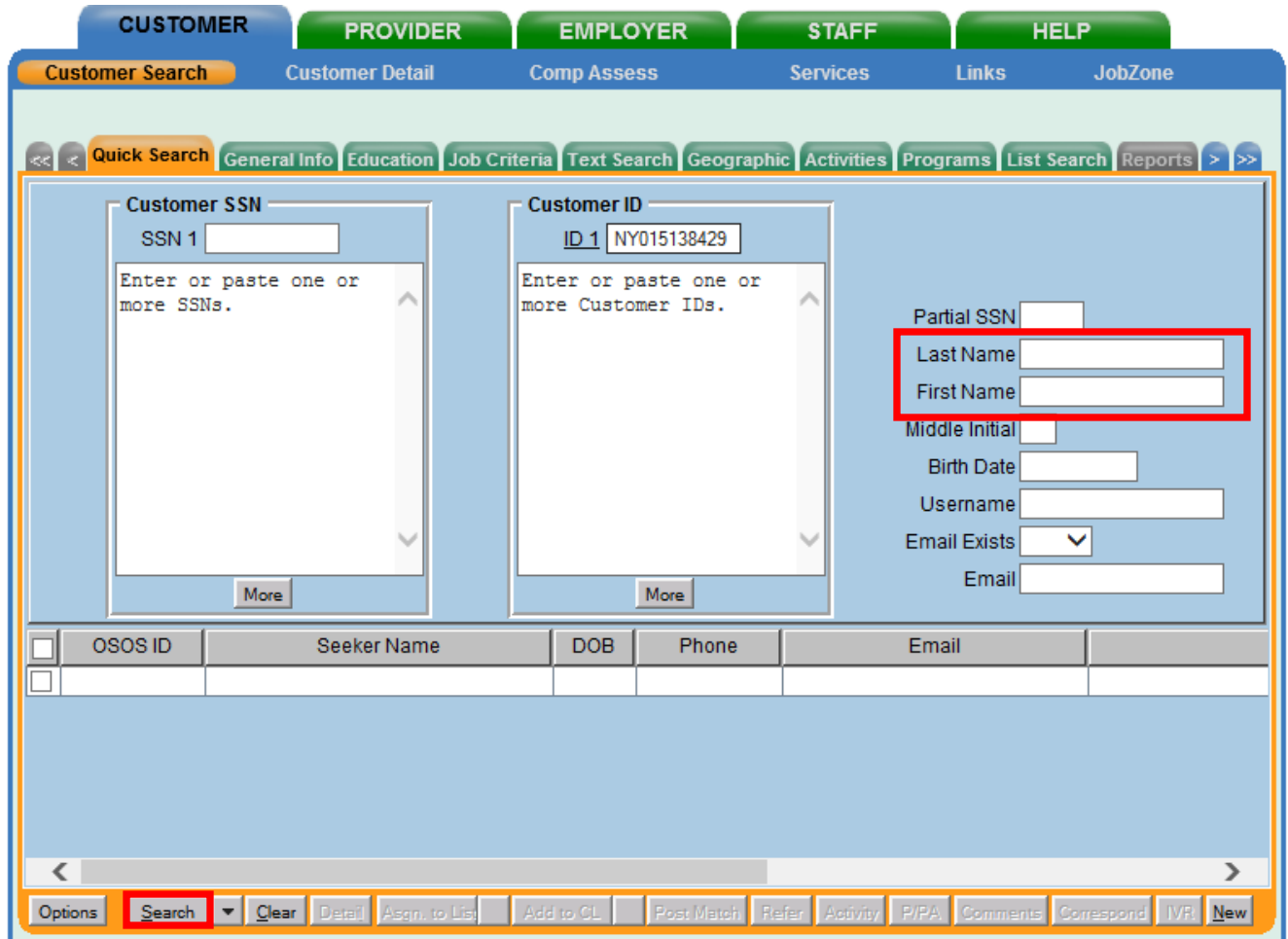


The screenshot shows the OSOS Staff Preferences window. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The STAFF tab is selected. Below the tabs are links for Staff Detail, Logout, Preferences, and Links. The Preferences link is highlighted with a red box. The main content area is titled 'Login Preferences' and is also highlighted with a red box. It contains two sections: 'Office' and 'Password'. The 'Office' section has three input fields: 'Primary Office' (NY9999), 'Current Office' (NY9999), and 'Change Office To' (a dropdown menu). A 'Change Office' button is located below the 'Change Office To' field. A yellow arrow points to the 'Change Office To' dropdown menu with the text 'Change Office'. The 'Password' section has four input fields: 'Username' (usbjtp), 'Old Password', 'New Password', and 'Confirm New Password'. A 'Change Password' button is located below the 'Confirm New Password' field.

FINDING THE CUSTOMER RECORD FOR ADDING A TAA SERVICE

ON-THE-JOB TRAINING

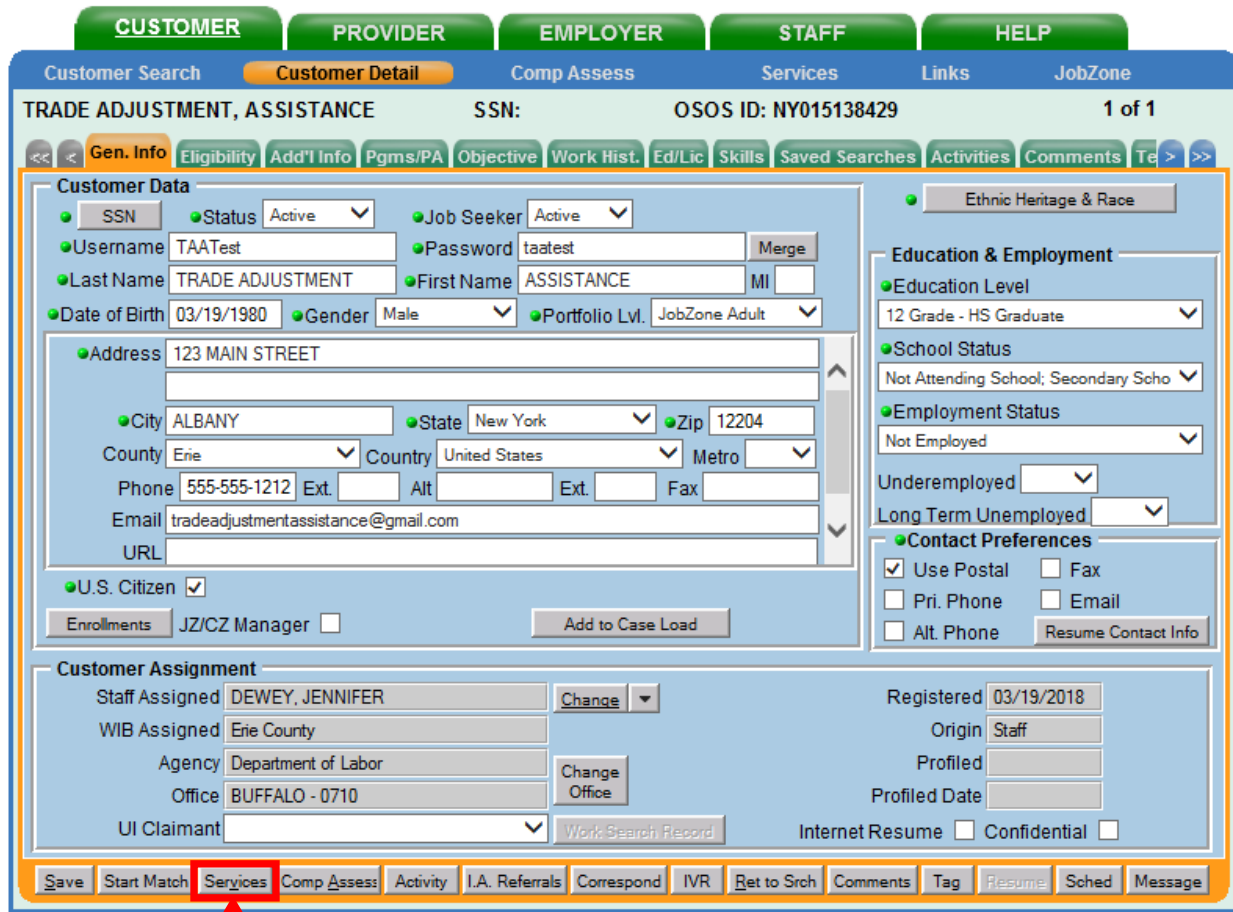
From the **Customer** module > **Customer Search** window > **Quick Search** tab, search for the appropriate customer record. This can be accomplished by entering the customer's **Last Name** and **First Name** as the search criteria. Click the **Search** button.



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 for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The Quick Search tab is active, showing various search criteria fields. The Last Name and First Name fields are highlighted with a red box. The Customer ID field contains the value NY015138429. The Search button at the bottom is also highlighted with a red box.

| OSOS ID | Seeker Name | DOB | Phone | Email |
|---------|-------------|-----|-------|-------|
| | | | | |

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



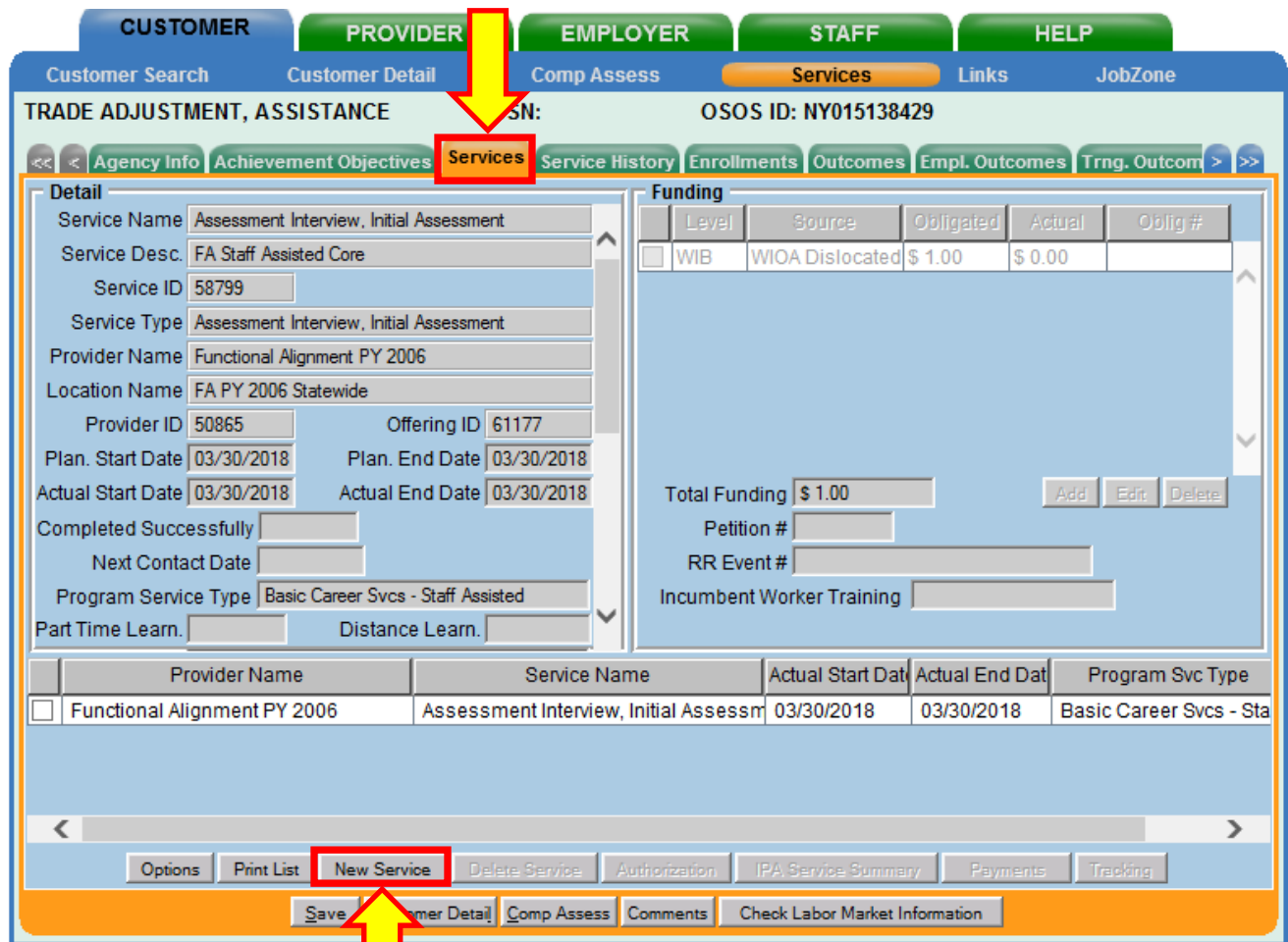
The screenshot displays the OSOS Customer Detail window for a customer named TRADE ADJUSTMENT, ASSISTANCE. The window is divided into several sections:

- 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 Staff Assigned (DEWEY, JENNIFER), WIB Assigned (Erie County), Agency (Department of Labor), Office (BUFFALO - 0710), and UI Claimant.
- Education & Employment:** Includes Education Level (12 Grade - HS Graduate), School Status (Not Attending School; Secondary Scho), Employment Status (Not Employed), and Contact Preferences (Use Postal, Fax, Pri. Phone, Email, Alt. Phone).

At the bottom of the window, there is a navigation bar with buttons for Save, Start Match, **Services** (highlighted with a red box), Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Strh, Comments, Tag, Resume, Sched, and Message. A yellow arrow points to the Services button.

ENTERING AN OJT SERVICE FOR A TAA PARTICIPANT

Navigate to the **Services** tab. The **Services** tab shows the services **Detail** for the customer. Click the **New Service** button.



The screenshot displays the OSOS interface for a Trade Adjustment Assistance (TAA) participant. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The main navigation area shows tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'Services' tab is selected and highlighted with a yellow arrow. Below this, a sub-navigation bar includes Agency Info, Achievement Objectives, Services, Service History, Enrollments, Outcomes, Empl. Outcomes, and Trng. Outcom. The 'Services' sub-tab is also highlighted with a yellow arrow.

The main content area is divided into two sections: **Detail** and **Funding**.

Detail Section:

- Service Name: Assessment Interview, Initial Assessment
- Service Desc: FA Staff Assisted Core
- Service ID: 58799
- Service Type: Assessment Interview, Initial Assessment
- Provider Name: Functional Alignment PY 2006
- Location Name: FA PY 2006 Statewide
- Provider ID: 50865, Offering ID: 61177
- Plan. Start Date: 03/30/2018, Plan. End Date: 03/30/2018
- Actual Start Date: 03/30/2018, Actual End Date: 03/30/2018
- Completed Successfully:
- Next Contact Date:
- Program Service Type: Basic Career Svcs - Staff Assisted
- Part Time Learn.: , Distance Learn.:

Funding Section:

| Level | Source | Obligated | Actual | Oblig # |
|--------------------------|--------|-----------------|---------|---------|
| <input type="checkbox"/> | WIB | WIOA Dislocated | \$ 1.00 | \$ 0.00 |

Total Funding: \$ 1.00 (Buttons: Add, Edit, Delete)

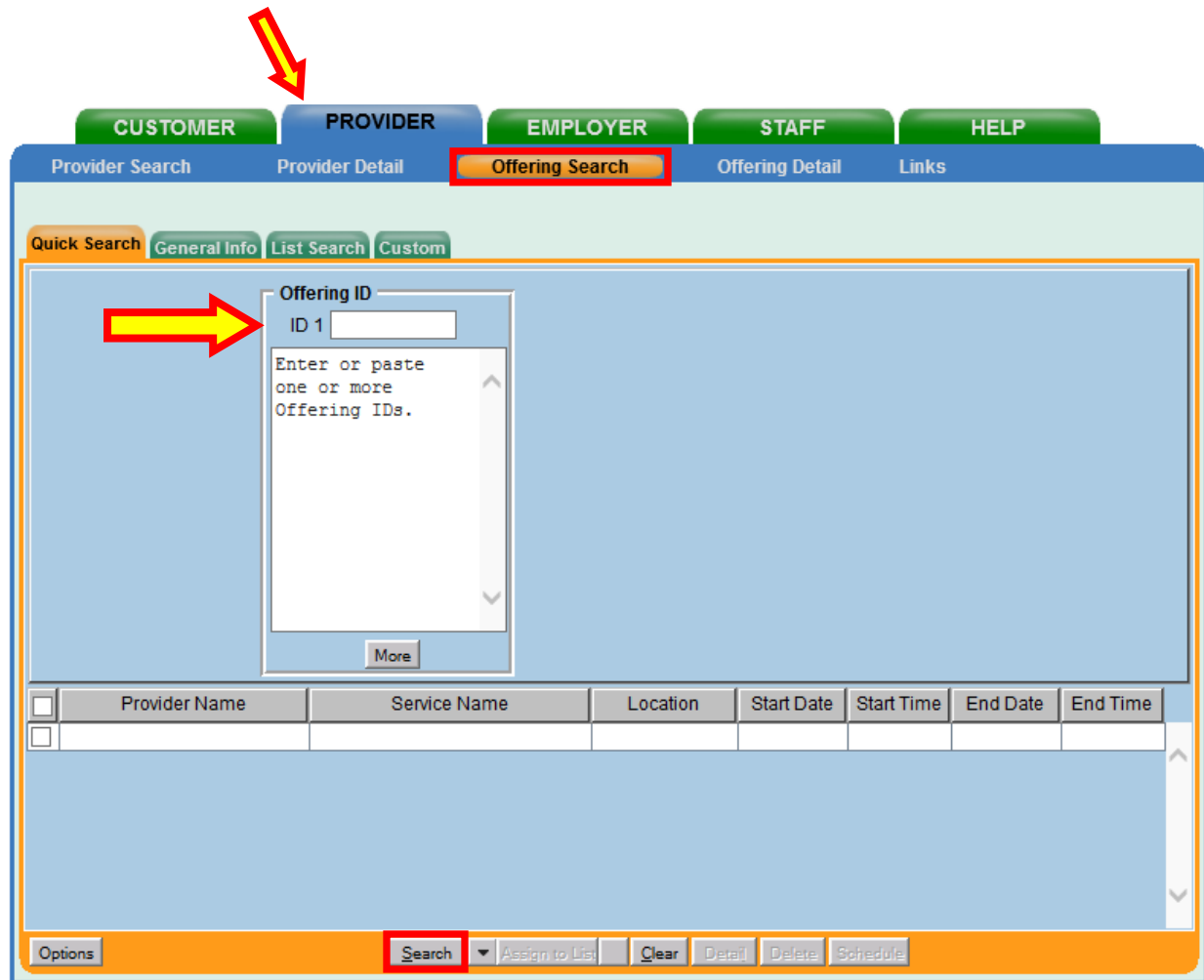
Petition #:
 RR Event #:
 Incumbent Worker Training:

Table:

| | Provider Name | Service Name | Actual Start Date | Actual End Date | Program Svc Type |
|--------------------------|------------------------------|--|-------------------|-----------------|-------------------------|
| <input type="checkbox"/> | Functional Alignment PY 2006 | Assessment Interview, Initial Assessment | 03/30/2018 | 03/30/2018 | Basic Career Svcs - Sta |

Buttons: Options, Print List, **New Service** (highlighted with a yellow arrow), Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments, Check Labor Market Information.

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.



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

Quick Search General Info List Search Custom

Offering ID
ID 1

Enter or paste one or more Offering IDs.

More

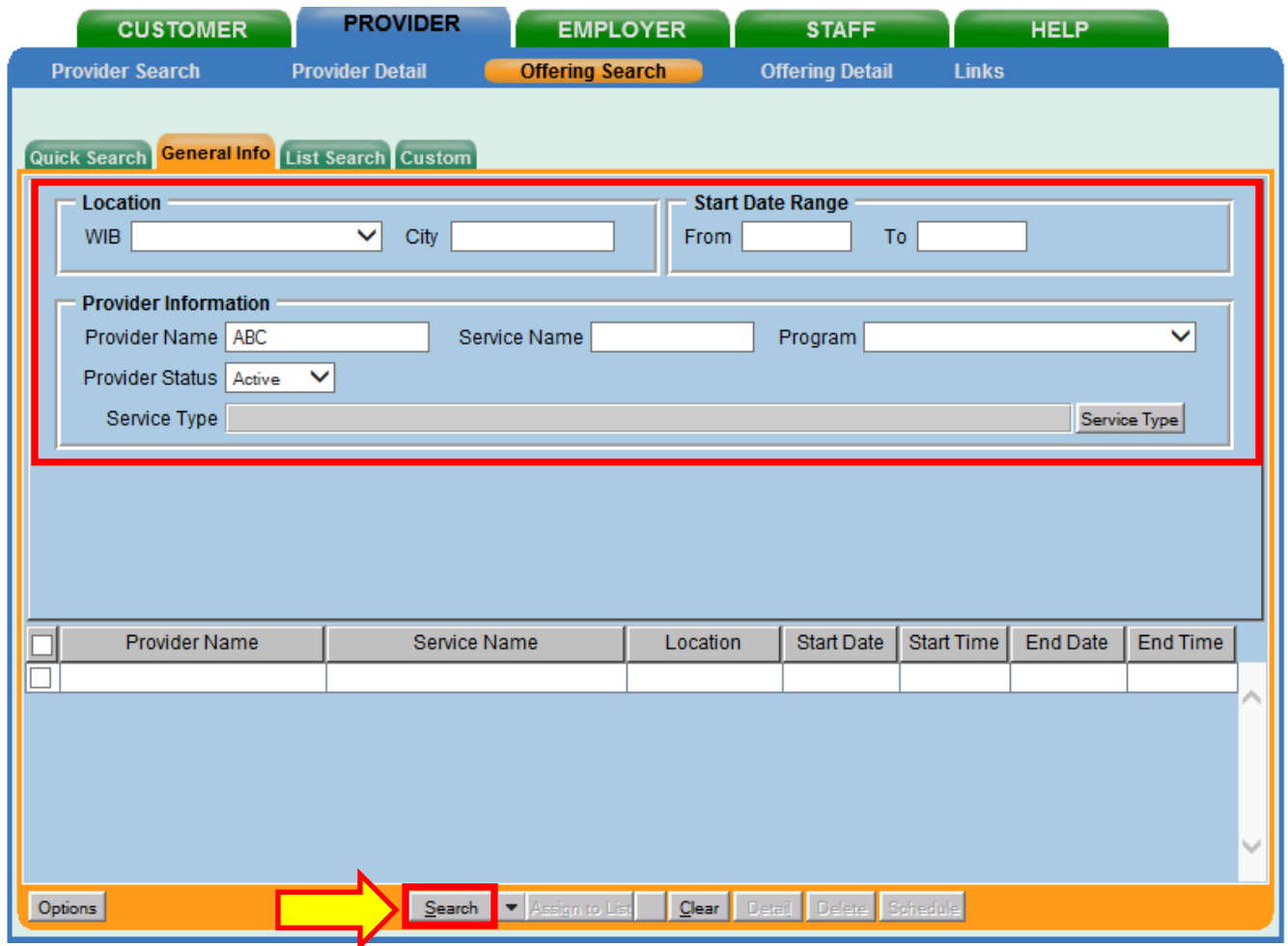
| <input type="checkbox"/> | Provider Name | Service Name | Location | Start Date | Start Time | End Date | End Time |
|--------------------------|---------------|--------------|----------|------------|------------|----------|----------|
| <input type="checkbox"/> | | | | | | | |

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

If the Offering ID is unknown, the service offering can be searched from the **Customer** module > **Offering Search** window > **General Info** tab. Enter the first few letters of the business name in the **Provider Name** field and click the **Search** button.



The business name may be listed in OSOS under different variations, naming conventions, or abbreviations. For example, a business may be listed in OSOS as “The ABC Company” or “ABC Company”.



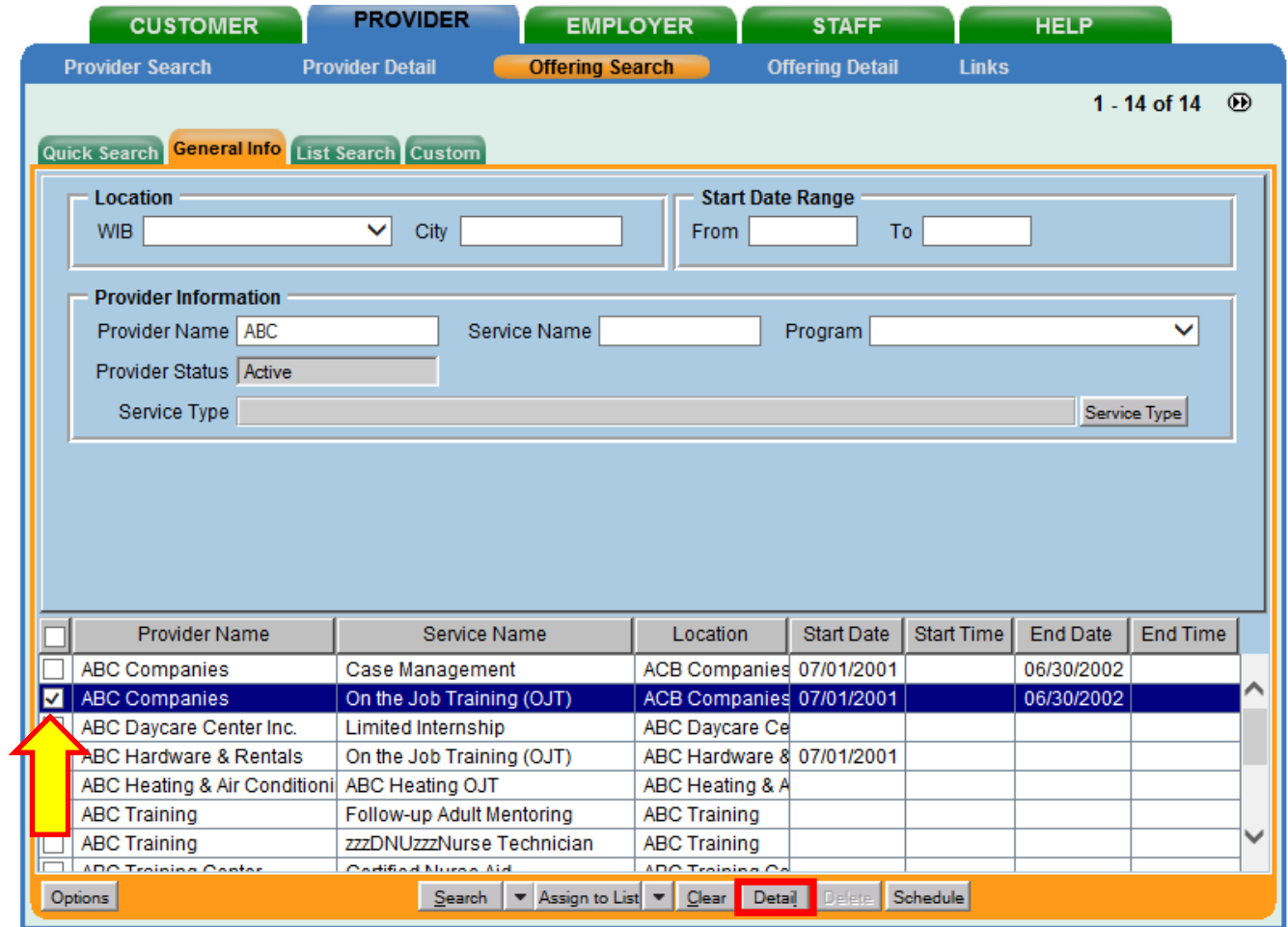
The screenshot shows the OSOS interface with the following elements:

- Navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP.
- Sub-navigation: Provider Search, Provider Detail, **Offering Search**, Offering Detail, Links.
- Search options: Quick Search, **General Info**, List Search, Custom.
- Search criteria fields (highlighted in red):
 - Location: WIB (dropdown), City (text input)
 - Start Date Range: From (text input), To (text input)
 - Provider Information:
 - Provider Name: ABC (text input)
 - Service Name (text input)
 - Program (dropdown menu)
 - Provider Status: Active (dropdown menu)
 - Service Type (text input)
- Table with columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, End Time.
- Bottom navigation: Options, **Search** (highlighted with a yellow arrow), 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 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 the offering, check the corresponding box to highlight the appropriate offering. Click the **Detail** button.



CUSTOMER **PROVIDER** **EMPLOYER** **STAFF** **HELP**

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

1 - 14 of 14

Location
 WIB City **Start Date Range**
 From To

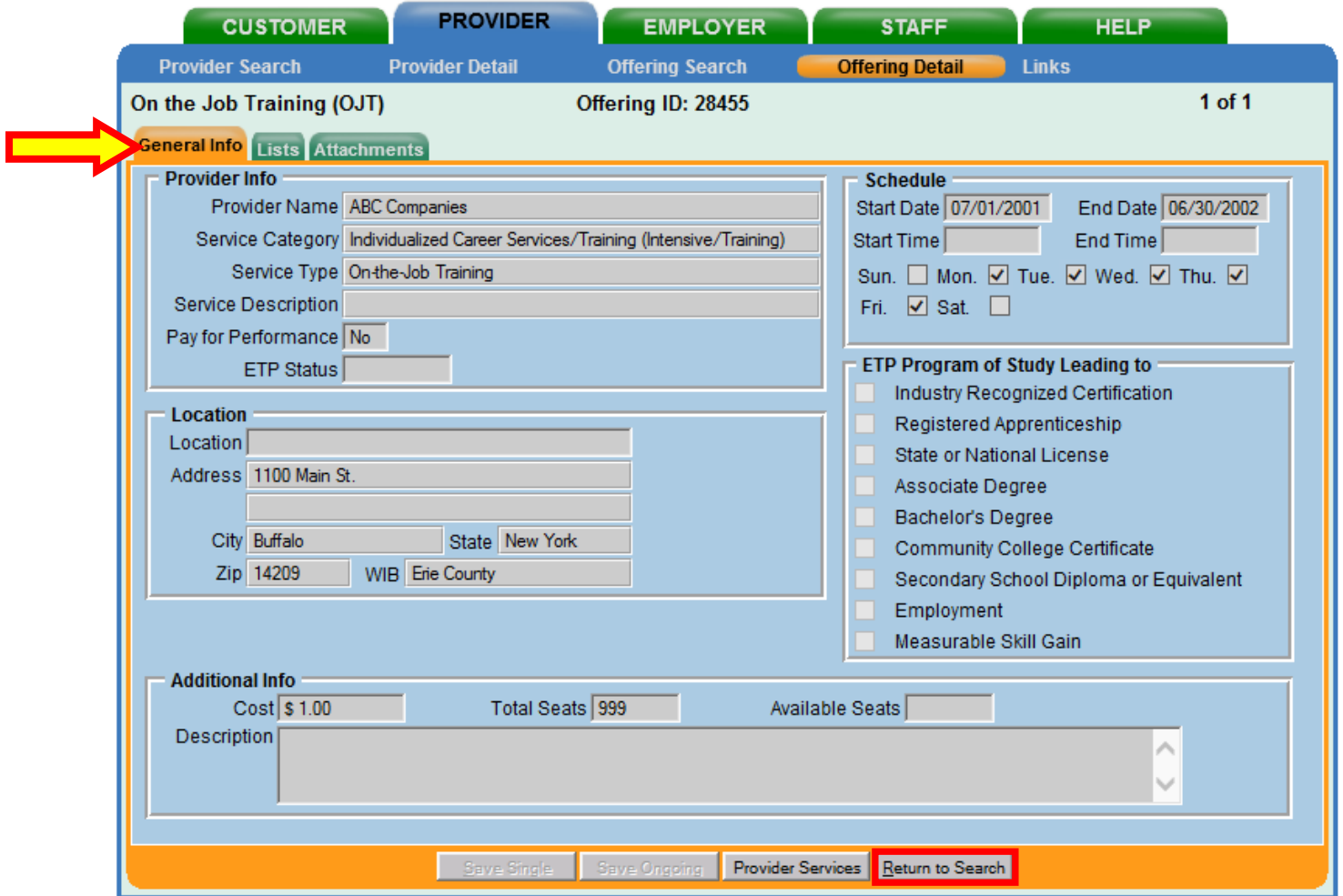
Provider Information
 Provider Name Service Name Program

Provider Status Service Type

| <input type="checkbox"/> | Provider Name | Service Name | Location | Start Date | Start Time | End Date | End Time |
|-------------------------------------|------------------------------|---------------------------|-----------------|------------|------------|------------|----------|
| <input type="checkbox"/> | ABC Companies | Case Management | ACB Companies | 07/01/2001 | | 06/30/2002 | |
| <input checked="" type="checkbox"/> | ABC Companies | On the Job Training (OJT) | ACB Companies | 07/01/2001 | | 06/30/2002 | |
| <input type="checkbox"/> | ABC Daycare Center Inc. | Limited Internship | ABC Daycare Ce | | | | |
| <input type="checkbox"/> | ABC Hardware & Rentals | On the Job Training (OJT) | ABC Hardware & | 07/01/2001 | | | |
| <input type="checkbox"/> | ABC Heating & Air Conditioni | ABC Heating OJT | ABC Heating & A | | | | |
| <input type="checkbox"/> | ABC Training | Follow-up Adult Mentoring | ABC Training | | | | |
| <input type="checkbox"/> | ABC Training | zzzDNUzzzNurse Technician | ABC Training | | | | |
| <input type="checkbox"/> | ABC Training Center | Certified Nurse Aid | ABC Training Ce | | | | |

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

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



CUSTOMER **PROVIDER** **EMPLOYER** **STAFF** **HELP**

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

On the Job Training (OJT) Offering ID: 28455 1 of 1

General Info Lists Attachments

Provider Info

Provider Name: ABC Companies
 Service Category: Individualized Career Services/Training (Intensive/Training)
 Service Type: On-the-Job Training
 Service Description:
 Pay for Performance: No
 ETP Status:

Location

Location:
 Address: 1100 Main St.
 City: Buffalo State: New York
 Zip: 14209 WIB: Erie County

Schedule

Start Date: 07/01/2001 End Date: 06/30/2002
 Start Time: End Time:
 Sun. Mon. Tue. Wed. Thu.
 Fri. Sat.

ETP Program of Study Leading to

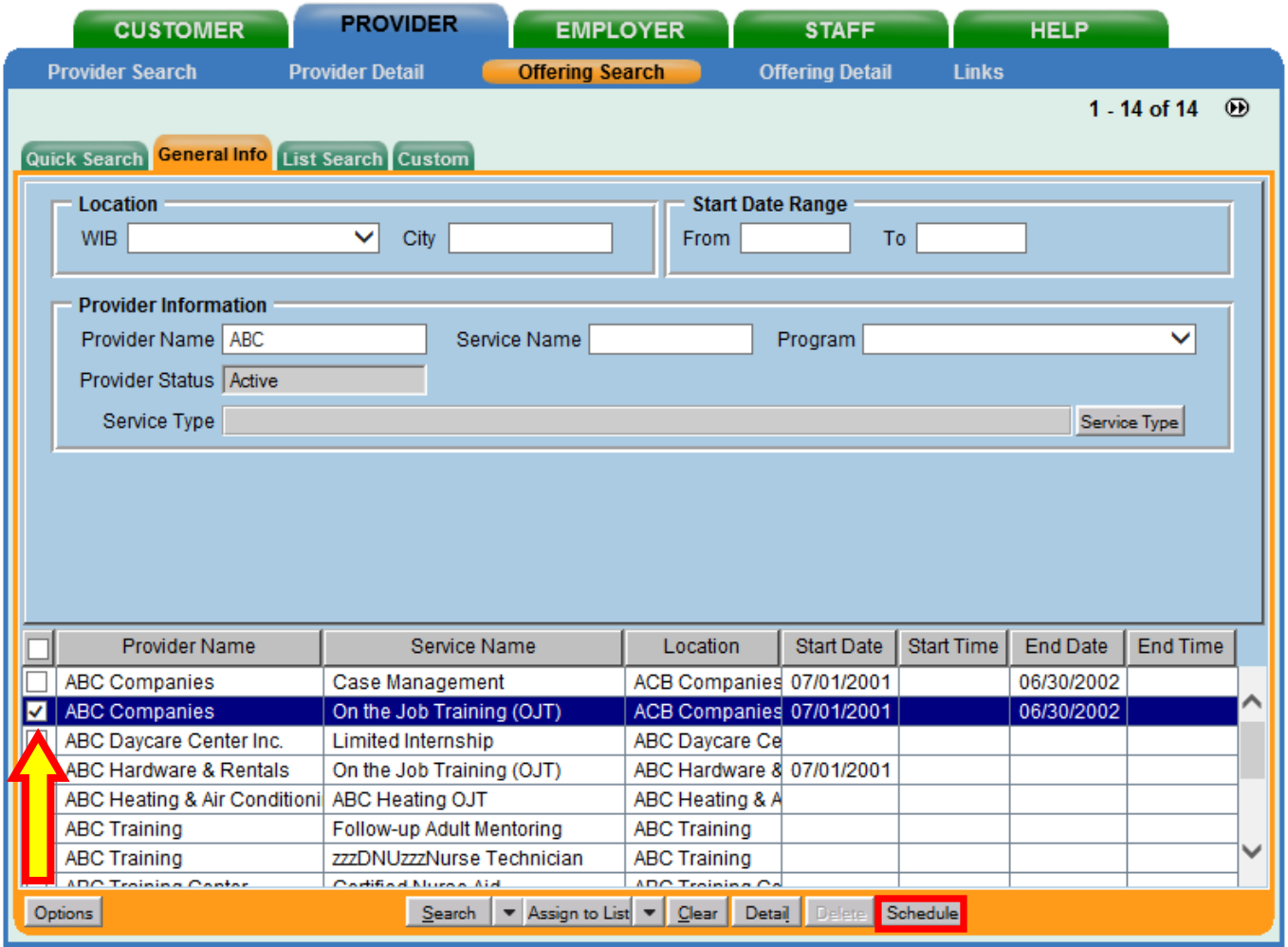
- Industry Recognized Certification
- Registered Apprenticeship
- State or National License
- Associate Degree
- Bachelor's Degree
- Community College Certificate
- Secondary School Diploma or Equivalent
- Employment
- Measurable Skill Gain

Additional Info

Cost: \$ 1.00 Total Seats: 999 Available Seats:
 Description:

Save Single Save Ongoing Provider Services **Return to Search**

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

1 - 14 of 14

Quick Search **General Info** List Search Custom

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

Provider Information:

Provider Name: ABC Service Name: [input] Program: [dropdown]

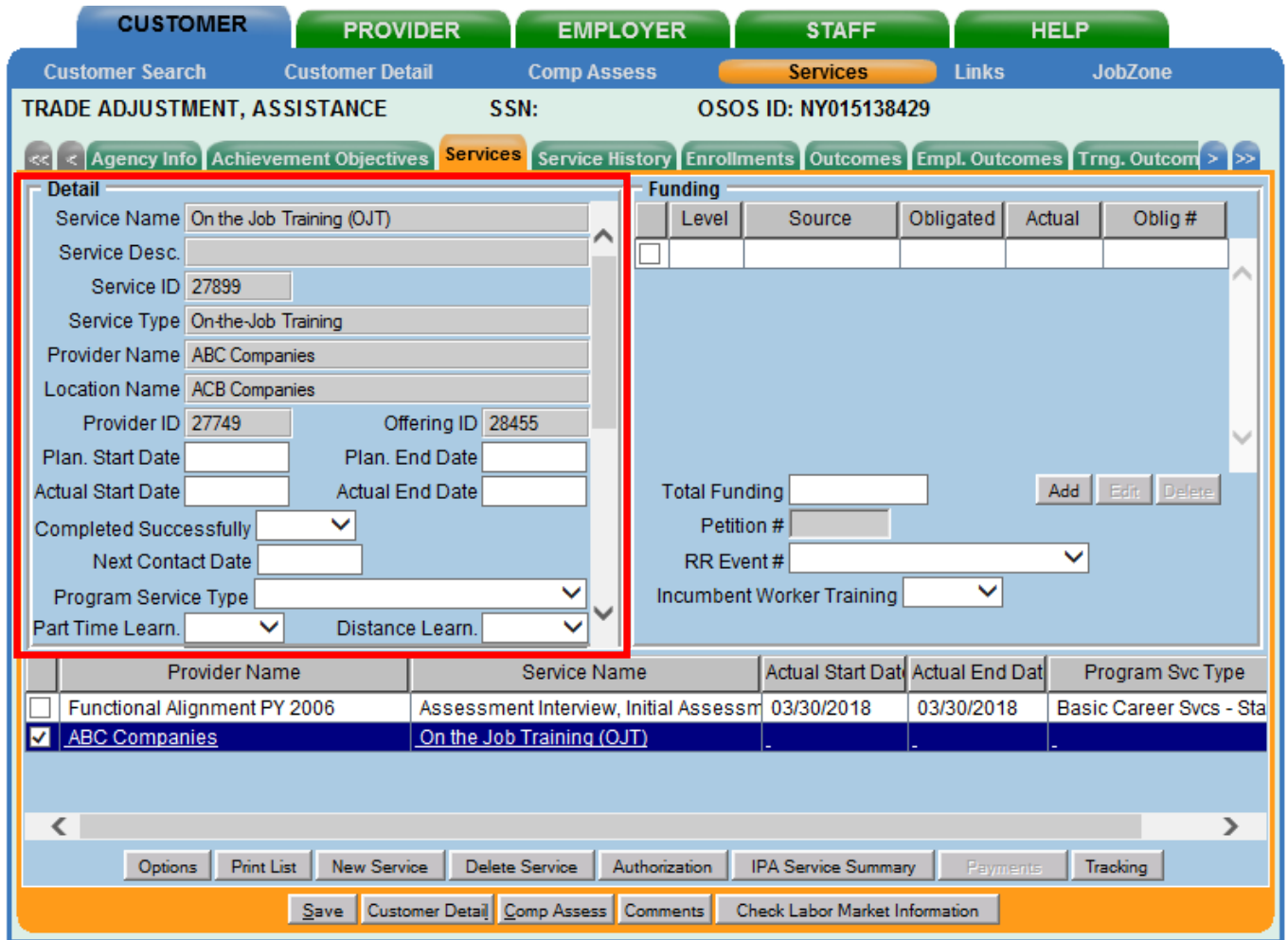
Provider Status: Active

Service Type: [input] Service Type: [input]

| <input type="checkbox"/> | Provider Name | Service Name | Location | Start Date | Start Time | End Date | End Time |
|-------------------------------------|------------------------------|---------------------------|-----------------|------------|------------|------------|----------|
| <input type="checkbox"/> | ABC Companies | Case Management | ACB Companies | 07/01/2001 | | 06/30/2002 | |
| <input checked="" type="checkbox"/> | ABC Companies | On the Job Training (OJT) | ACB Companies | 07/01/2001 | | 06/30/2002 | |
| <input type="checkbox"/> | ABC Daycare Center Inc. | Limited Internship | ABC Daycare Ce | | | | |
| <input type="checkbox"/> | ABC Hardware & Rentals | On the Job Training (OJT) | ABC Hardware & | 07/01/2001 | | | |
| <input type="checkbox"/> | ABC Heating & Air Conditioni | ABC Heating OJT | ABC Heating & A | | | | |
| <input type="checkbox"/> | ABC Training | Follow-up Adult Mentoring | ABC Training | | | | |
| <input type="checkbox"/> | ABC Training | zzzDNUzzzNurse Technician | ABC Training | | | | |
| <input type="checkbox"/> | ABC Training Center | Codified Nurse Aid | ABC Training Ce | | | | |

Options 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.



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 Name: On the Job Training (OJT)

Service Desc.:

Service ID: 27899

Service Type: On-the-Job Training

Provider Name: ABC Companies

Location Name: ACB Companies

Provider ID: 27749 | Offering ID: 28455

Plan. Start Date: | Plan. End Date: |

Actual Start Date: | Actual End Date: |

Completed Successfully:

Next Contact Date: |

Program Service Type:

Part Time Learn.: | Distance Learn.:

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"/> | ABC Companies | On the Job Training (OJT) | - | - | - |

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

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

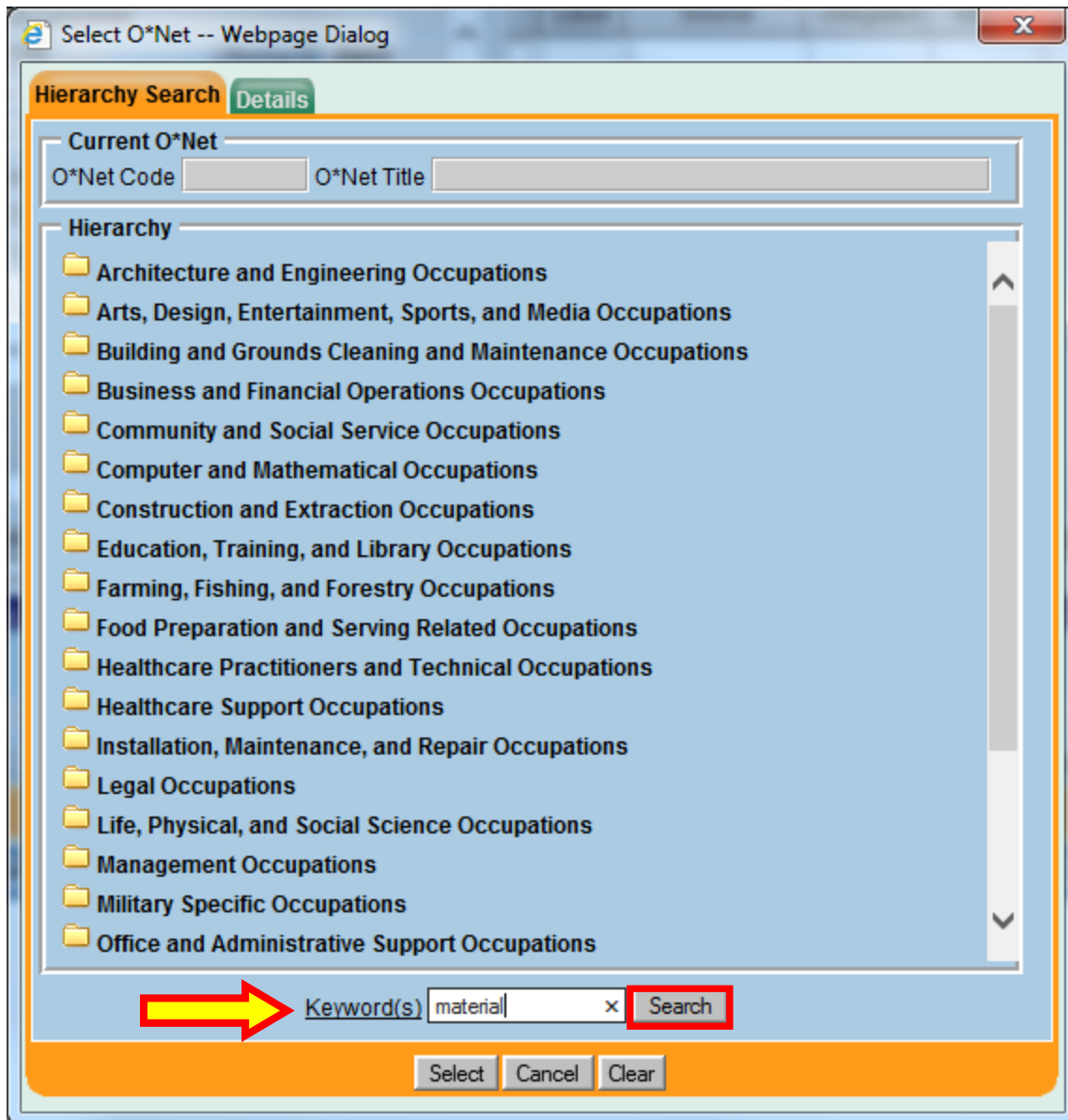


The Planned Start Date and Actual Start Date of the service cannot be earlier than the: Application Date, Qualifying Separation Date, and Eligibility Determination Date.

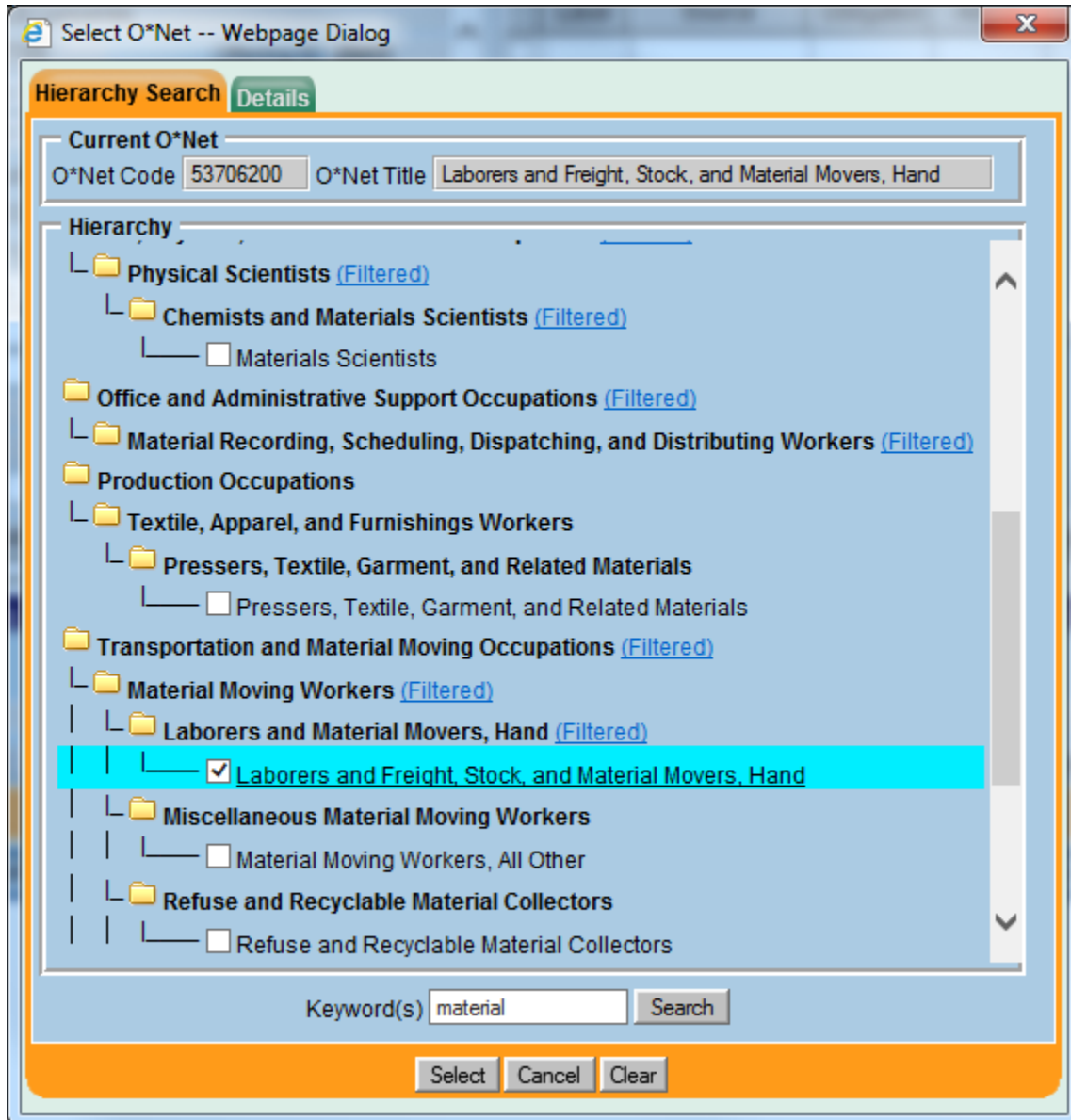
Note: The Application Date will always be on or before the Eligibility Determination Date.

Exception: When data entering the Application Date and Eligibility Determination Date for Adversely Affected Incumbent Workers (AAIW) you must enter the mail date

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**.



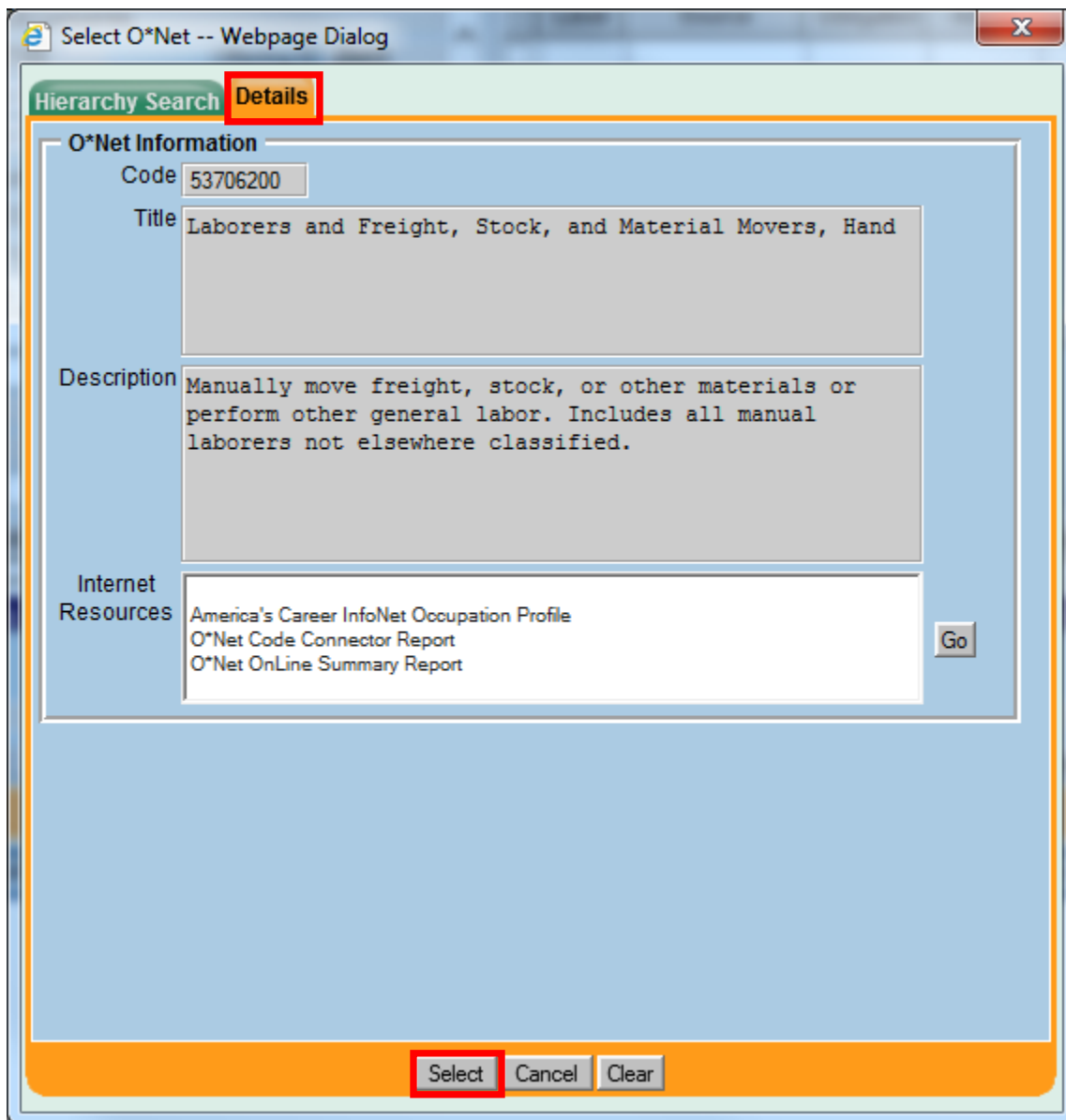
Use the scroll bar to view the O*Net Titles containing the keyword. Check the box for the appropriate O*Net Title.



If the details of the O*Net Title are not required, 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, return to 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 box titled "Select O*Net -- Webpage Dialog". It has two tabs: "Hierarchy Search" and "Details". The "Details" tab is active and highlighted with a red box. The "O*Net Information" section contains the following fields:

- Code:** 53706200
- Title:** Laborers and Freight, Stock, and Material Movers, Hand
- Description:** Manually move freight, stock, or other materials or perform other general labor. Includes all manual laborers not elsewhere classified.
- 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 this section.

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: On-the-Job Training

Provider Name: ABC Companies

Location Name: ACB Companies

Provider ID: 27749 Offering ID: 28455

Plan. Start Date: 03/30/2018 Plan. End Date: 09/30/2018

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

Completed Successfully:

Next Contact Date:

Program Service Type: Non-ITA Training

Part Time Learn.: No Distance Learn.: No

Program:

Minimum Hours: Number of Weeks:

O*Net: 53706200 Laborers and Freight, Stock, and Material 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"/> | ABC Companies | On the Job Training (OJT) | 03/30/2018 | . | Non-ITA Training |

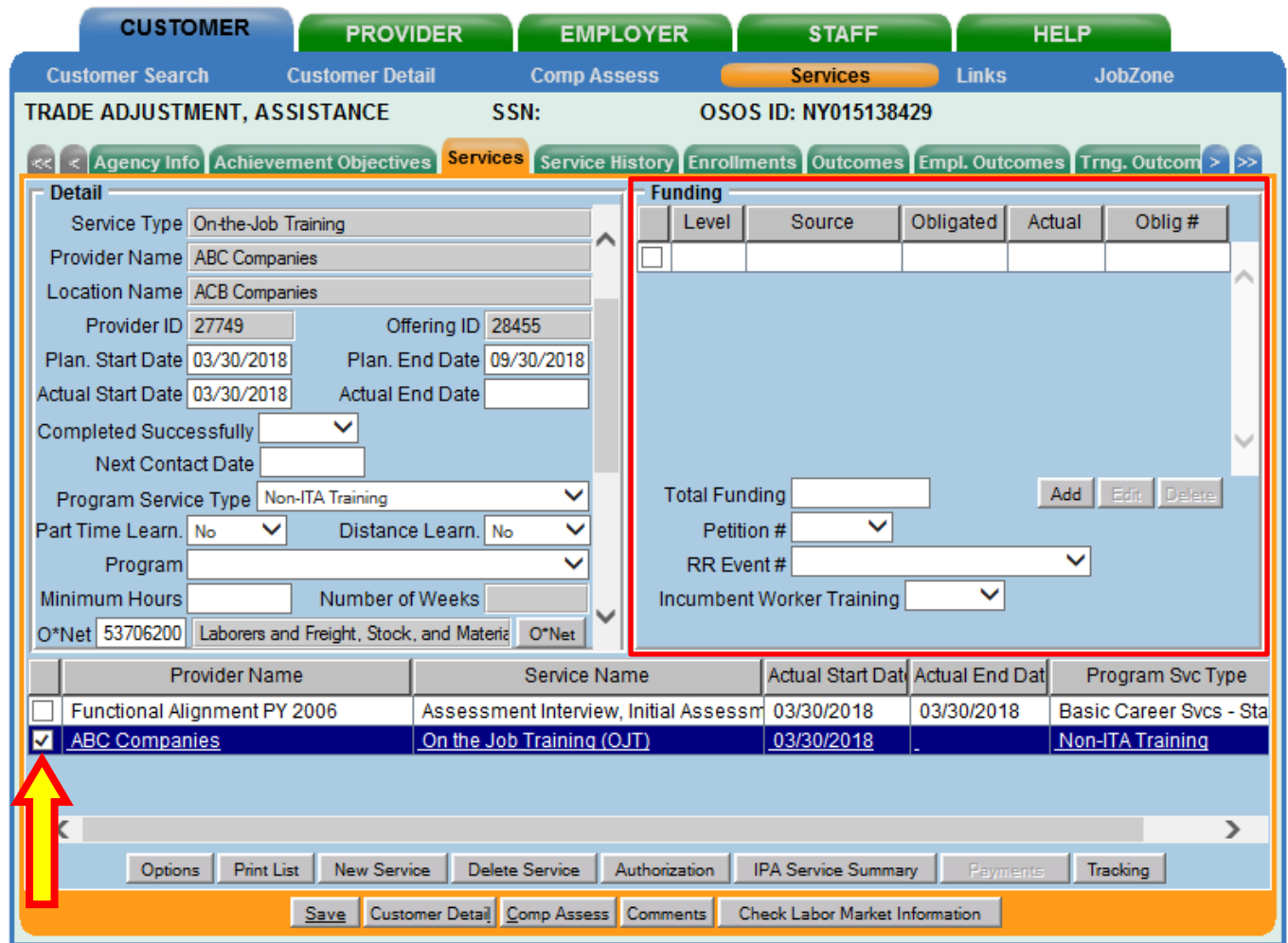
Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save Customer Detail Comp Assess Comments Check Labor Market Information

FUNDING AN OJT SERVICE

The appropriate funding source is required to be attached to the service.

Within the **Customer** module > **Services** window > **Services** tab, check the corresponding box to select the appropriate service.



The screenshot shows the OSOS interface with the 'CUSTOMER' module selected. The 'Services' tab is active, displaying details for a service provided by 'ABC Companies'. The 'Funding' section is highlighted with a red box, showing a table with columns for Level, Source, Obligated, Actual, and Obligation #. Below this, there are fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Training. A table at the bottom lists services, with the 'ABC Companies' service selected (checked).

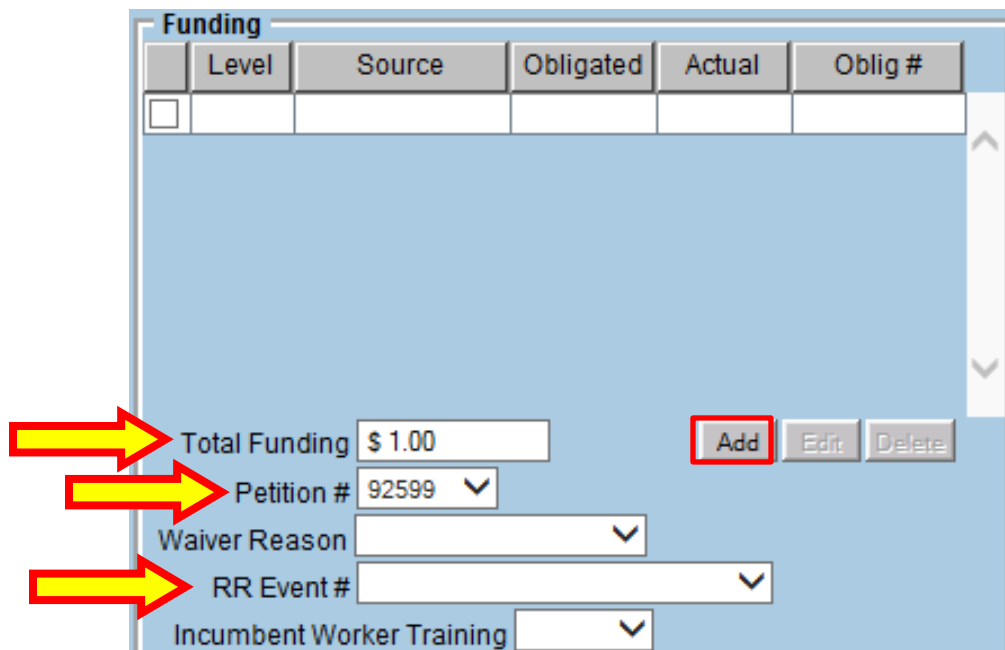
| Level | Source | Obligated | Actual | Oblig # |
|--------------------------|--------|-----------|--------|---------|
| <input type="checkbox"/> | | | | |

| 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"/> ABC Companies | On the Job Training (OJT) | 03/30/2018 | - | Non-ITA Training |

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 amount 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.



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

Total Funding: \$ 1.00 Add Edit Delete
 Petition #: 92599 ▼
 Waiver Reason: ▼
 RR Event #: ▼
 Incumbent Worker Training: ▼



*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. Click the **Funding Source** column header to sort funds. From the list, select the appropriate "TAA" funding with the most recent year. Enter "\$1.00" in the **Obligated Amount** data field. **Obligated Percentage** will auto fill. Click **OK**.



The OJT Service must be funded with Trade Act funds. 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: On-the-Job Training

Provider Name: ABC Companies

Location Name: ACB Companies

Provider ID: 27749 Offering ID: 28455

Plan. Start Date: 03/30/2018 Plan. End Date: 09/30/2018

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

Completed Successfully:

Next Contact Date:

Program Service Type: Non-ITA Training

Part Time Learn.: No Distance Learn.: No

Program:

Minimum Hours: Number of Weeks:

O*Net: 53706200 Laborers and Freight, Stock, and Materis O*Net

Funding

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

Total Funding \$ 1.00

Petition # 92599

Waiver Reason:

RR Event #:

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"/> | ABC Companies | On the Job Training (OJT) | .03/30/2018 | . | Non-ITA Training |

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

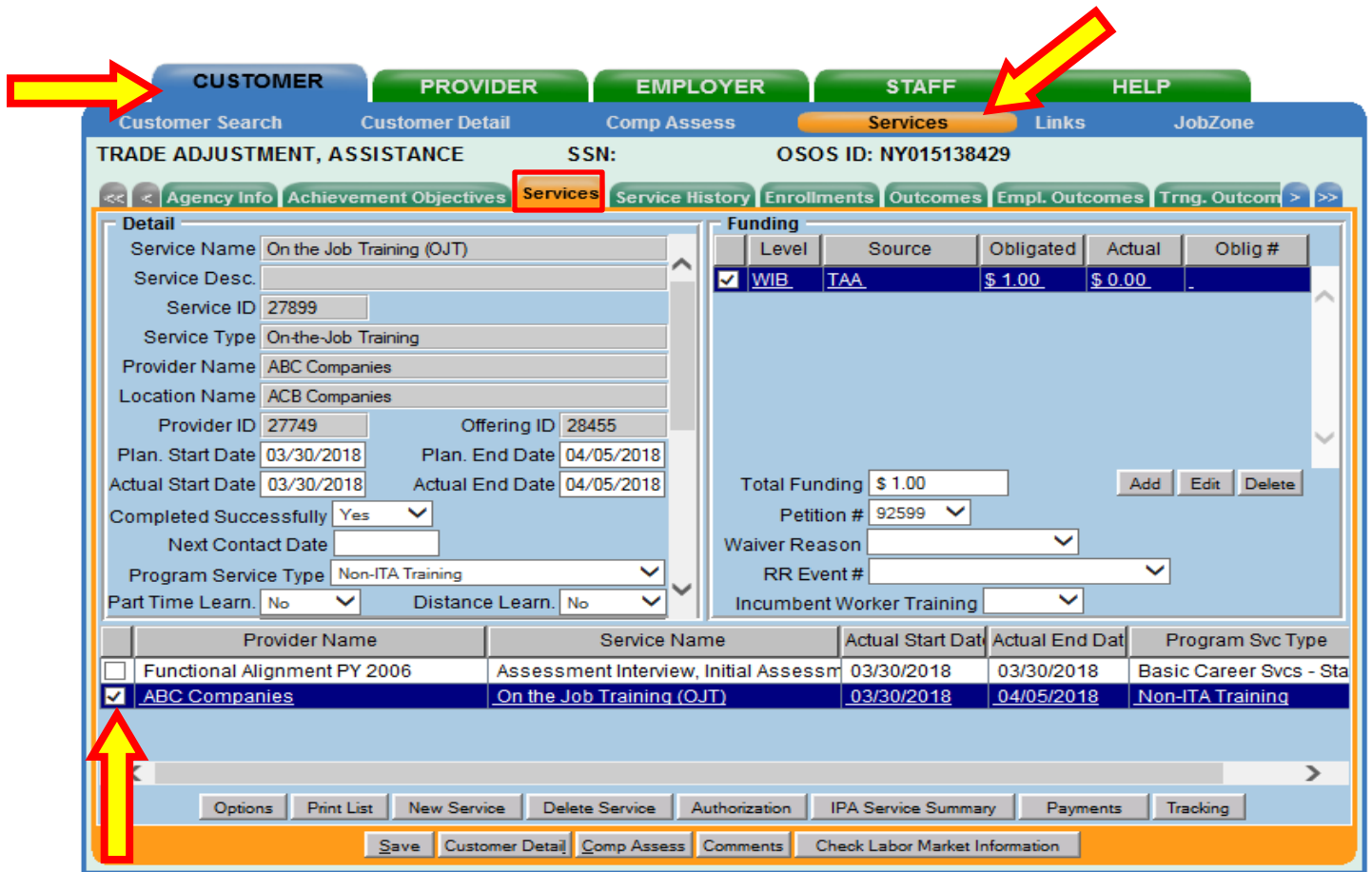
Save Customer Detail Comp Assess Comments Check Labor Market Information

The OJT Service is now entered and funded with TAA funds.

ENDING AN OJT SERVICE

When the On-The-Job Training (OJT) 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. The details for that service will populate in the **Detail** and **Funding** sections of the page.



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 Name: On the Job Training (OJT)
 Service Desc.:
 Service ID: 27899
 Service Type: On-the-Job Training
 Provider Name: ABC Companies
 Location Name: ACB Companies
 Provider ID: 27749 Offering ID: 28455
 Plan. Start Date: 03/30/2018 Plan. End Date: 04/05/2018
 Actual Start Date: 03/30/2018 Actual End Date: 04/05/2018
 Completed Successfully: Yes
 Next Contact Date:
 Program Service Type: Non-ITA Training
 Part Time Learn.: No Distance Learn.: No

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 #:
 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"/> | ABC Companies | On the Job Training (OJT) | 03/30/2018 | 04/05/2018 | Non-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 OJT 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. 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. Select "Yes" if the program was completed successfully.

Click **Save**.

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

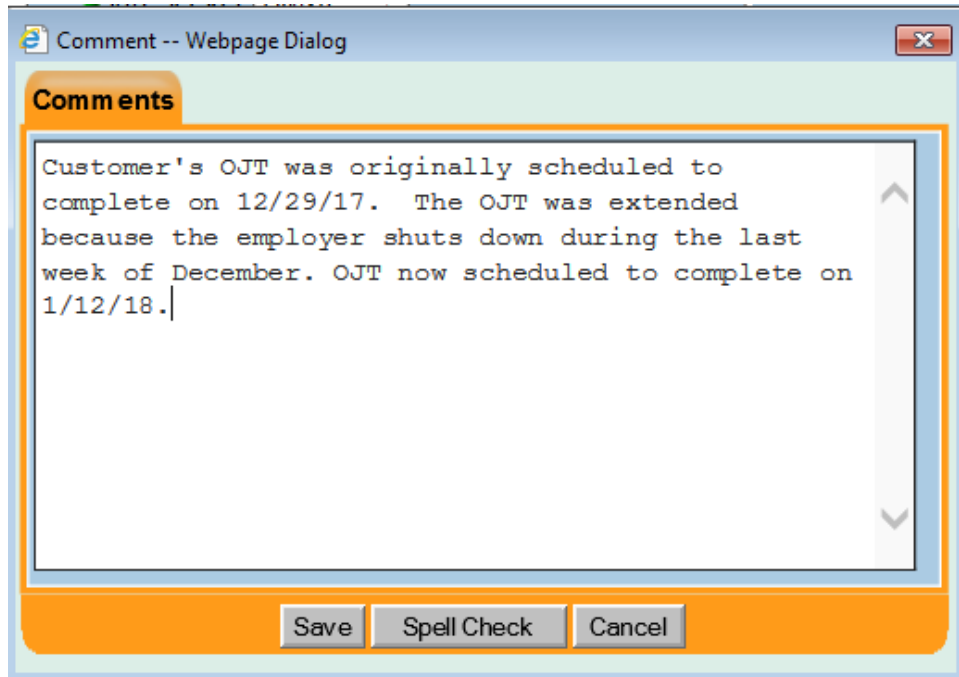
| Provider Name | Service Name | Actual Start Date | Actual End Date | Program Svc Type |
|-------------------------------------|---|-------------------|-----------------|-----------------------|
| <input checked="" type="checkbox"/> | ABC Companies On the Job Training (OJT) | 03/30/2018 | 04/05/2018 | Non-ITA Training |
| <input type="checkbox"/> | Functional Alignment PY 2006 Assessment Interview, Initial Assessment | 03/30/2018 | 03/30/2018 | Basic Career Services |



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 contact customers regarding completion of training per the guidance included with the report.

ENTERING COMMENTS

As a best practice, when a customer's OJT has been extended or ended unsuccessfully, staff must 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 worked should be included in the comment.



The screenshot shows a web browser dialog box titled "Comment -- Webpage Dialog". The dialog has a tab labeled "Comments". Inside the dialog is a text area containing the following text: "Customer's OJT was originally scheduled to complete on 12/29/17. The OJT was extended because the employer shuts down during the last week of December. OJT now scheduled to complete on 1/12/18." Below the text area are 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