Trade Adjustment Assistance - Entering OJT Services & Funding
OSOS Guide
## TABLE OF CONTENTS

Purpose ........................................................................................................................................... 2

Logging into the Correct Office ........................................................................................................ 3

Finding the Customer Record for Adding a TAA Service ................................................................. 4

Entering an OJT Service for a TAA Participant .................................................................................. 6

Funding an OJT Service ....................................................................................................................... 18

Ending an OJT Service ....................................................................................................................... 22

Entering Comments ............................................................................................................................ 24

Resources and Assistance .................................................................................................................. 25
PURPOSE
The TAA program offers customers various benefits. One of these benefits is training. Customers determined 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.
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.
From the customer record, click the **Services** button to navigate to the **Services** window.
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.
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.
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”.*

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.
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.
When the appropriate offering is identified, check the corresponding box to highlight the offering and click **Schedule**.
Clicking the Schedule button navigates directly to the Customer module > Services window > Services tab. The Service Type, Provider Name, Location Name, and other details will auto-populate in the Detail section and are shown in the grayed-out fields.

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

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

Exception: When data entering the Application Date and Eligibility Determination Date for Adversely Affected Incumbent Workers (AAIW) you must enter the mail date
of the threatened status letter in both fields. Contact the TAA unit for assistance at labor.sm.wdtd.taa

Complete the following data fields in the **Detail** section of the tab.

- **Planned Start Date**: The date when 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**: For OJT, select "Non-ITA Training" from the drop-down menu.
- **Part Time Learn**: For OJT, select "No" from the drop-down menu.
- **Distance Learn**: For OJT, select "No" from the drop-down menu.
- **O*Net**: Select the O*Net Title that best describes the occupation that the customer plans to pursue when training is completed.

Click Save.
Click the O*Net button. This will bring up the Select O*Net--Webpage Dialog screen. To search for the desired O*Net, enter applicable keyword(s) and click Search.
Use the scroll bar to view 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.
Upon selection of the O*Net Title, the system returns to the **Customer module > Services window > Services tab. Click Save.**
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.
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.*

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.
Click Save.

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.
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.

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.

Example Comment:

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.
RESOURCES AND ASSISTANCE

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

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


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

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