Trade Adjustment Assistance - Entering and Funding Apprenticeships
OSOS Guide
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PURPOSE
The TAA program offers customers various benefits. One of these benefits is apprenticeship training.

This guide will provide comprehensive instructions on how to conduct the OSOS data entry for recording a single service for customers in a TAA approved apprenticeship program. It will cover data entry for adding, funding, and ending the apprenticeship 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), are displayed in the Staff module > Preferences window > Login Preferences tab.

To change the current office, select the appropriate office from the Change Office To dropdown field and then click the Change Office button.
FINDING THE CUSTOMER RECORD FOR ADDING A TAA SERVICE APPRENTICESHIP

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, or the Customer ID. Click the Search button.
From the customer record, click the **Services** button to navigate to the **Services** window.
ENTERING AN APPRENTICESHIP SERVICE FOR TAA RECIPIENT

A TAA approved apprenticeship program must be entered as a single service into OSOS.

In the TAA participant customer record, navigate to the Customer module > Services window > Services tab. 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, select the **General Info** tab to search for the service offering. Enter the training program information in the data field(s) in the **General Info** tab. Then click the **Search** button.
The search may result in multiple offerings that match the specified search criteria. To find more information on the offering, highlight the appropriate offering. Click the **Detail** button.
The system will navigate to the **Provider** module > **Offering Detail** window > **General Info** tab. If only one offering matches the search criteria, OSOS navigates directly to this screen.

*For apprenticeship training services, it is critical that the Service Type for the offering is Apprenticeship Training. The Service Type is assigned when the service is created in the Provider record.*

*There are designated staff in each of the LWDBs that have permissions 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.*

If the offering was not appropriate, click **Return to Search**. Then, select another offering, and click the **Detail** button to review.
When the appropriate offering is identified, click to highlight it and then click **Schedule**.
Clicking the **Schedule** button navigates directly to the **Customer** module > **Services** window > **Services** tab. The **Service Type**, **Provider Name**, **Location Name**, **O*Net** and other details will auto populate in the **Detail** section.

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 "Non-ITA Training" for apprenticeship training from the drop-down menu.
- **Minimum Hours**: Enter minimum required hours for apprenticeship, if known.
- **O*Net**: Pre-populates from the offering.
- **NAICS**: Select the NAICS that best describes the industry for which the customer is completing the apprenticeship.

Click **Save**.
FUNDING AN APPRENTICESHIP SERVICE

The appropriate funding source is required to be attached to the service. The training service must be funded with TAA funds for reporting purposes.

When the service is highlighted, the Funding section will be able to be completed.
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 or decimal 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 **Funding Webpage Dialog** pop-up will appear. Enter **$1.00** in the Obligated Amount field. Select the appropriate TAA Funding Source for the most recent program year. The **Obligated Percentage** field will auto-populate. Click **OK**.
The apprenticeship service is now entered and the funding is complete. Click **Save**.
ENDING AN APPRENTICESHIP SERVICE

When the apprenticeship service has ended, the service must be closed. 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 apprenticeship 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 apprenticeship program before successful completion, enter the customer's last day 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.
ENTERING COMMENTS

As a best practice, when a customer’s apprenticeship 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 worked should be included in the comment.

Click Comments.
The **Comment Webpage Dialog** box will appear.

Enter comments and click **Save**.
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:
http://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