Trade Adjustment Assistance
Roundtable Virtual Tour
Spring 2021
Introductions

TAA Staff

- Sarah Saito, TAA Supervisor
- Olajide Williams, TAA Specialist Senior
- Tamika Brewer, TAA Specialist Senior
- Thomas Sommer, TAA Performance Specialist
- Jackie Umlauf, TAA Specialist (follow-up)
- Claudette Parchment-Roehrich, TAA Specialist
- Mohamed Farah, TAA Specialist
- Jennifer Anderson, TAA Specialist
- Laurie Larson, TAA Specialist
- Ann Malz, TAA Specialist
- Meg Odanga, TAA Specialist
- Hony Yang, TAA Specialist
- Marla Beaty, Senior Rapid Response Project Manager & TAA Liaison
- Nancy Omondi, Director of Adult Programs
Presenters

Laurie Larson, TAA Specialist

Ann Malz, TAA Specialist
Presenters

Jackie Umlauf, TAA Specialist

Olajide Williams, SR. TAA Specialist
Overview of Presentation

• Choice of Training
• Training Progress Reports (TPRs)
• Computers, Tools and Internet
• Transportation
• Case Management Model; TAA, DW and Customer Roles and Responsibilities
• Counselor Portal
Choice of Training Institution

• The choice of training selected by customer should focus on the following (in this order):
  • Program with the soonest training end date (compared to other school options)
  • Lowest cost option (higher cost options “may” be considered if completion of training will be sooner than other school options)
  • It is within the customer’s commuting area
  • TAA Specialist reserve the right to research all proposed training options and ask for comparisons
Choice of Training Worksheet

YOU WILL NEED PRE-APPROVAL BEFORE ANY PURCHASE RELATED TO TRAINING.

Are you taking at least one online course? Yes □ No □ If yes, will you need assistance paying internet costs? Yes □ No □

Will you need to travel more than 15 miles one way to attend training? Yes □ No □ If Yes, please include a map showing the distance from your home to school. TAA will assist with mileage beyond the commuting area (15 miles one way).

For the purpose of training, do you intend to maintain a second residence? Yes □ No □ If Yes, please attach a map showing the distance from your home to school and proof for cost of residence and meal plan (if applicable).

Is the training institution a public school? Yes □ No □ If the training institution is not a public school, please complete the "Choice of Institutions Justification Worksheet" found here: https://mn.gov/deed/programs-services/dislocated-worker/counselors/forms/. Most public schools have lower tuition and need to be considered first.

Provide additional reasons why you need to enter training:

FUTURE EMPLOYMENT

List three employers currently hiring in your region that require the credential you will receive.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Job Title</th>
<th>Credential Needed</th>
<th>Experience Needed</th>
<th>Base Pay</th>
</tr>
</thead>
</table>

[Your list here]
Choice of Training Institutions Justification Worksheet

Per CFR 618.610 Trade Adjustment Assistance (TAA) customers must meet certain eligibility criteria related to the choice of training institution. Customers should do a comprehensive comparison of all available school programs for the training they seek. Approval is based on the following in this order. Please make a check mark in all boxes that apply:

☐ Shortest training completion (Criterion 6)
   Customers should seek the soonest available training and training that results in the soonest training end date.

☐ Available at a reasonable cost (Criterion 4 and 6)
   Customers should select training that is available at a reasonable cost in comparison to other similar training programs. A higher cost training may be considered if the completion date of training is sooner than other programs at a lower cost.

☐ Is within the local commuting area (Criterion 4)
   Customers should select training that is within their local commuting area (15 miles one-way) unless the training can be completed in a sooner timeframe or is available at a lower cost than local training.

Please enter the information below for at least 3 school comparisons.

<table>
<thead>
<tr>
<th>School</th>
<th>Program</th>
<th>Start date</th>
<th>End date</th>
<th>Total credits</th>
<th>Cost per Credit</th>
<th>Total cost</th>
<th>Miles (one-way)</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

***Please note: TAA staff may perform additional research and request additional information about training options to ensure the Six Criteria for Approval are appropriately documented. An academic plan showing which courses will be taken each term until completion may be requested.
Training Progress Report (TPRs)

• The TPR fulfills DOL benchmark requirements

• Required every 60 days. Clock resets based on the date the advisor signs the top portion

• Only advisor/school official should sign top portion (not instructors)

• Instructors should sign the bottom portion—one class per line

• Can opt to send email answering questions instead
Training Progress Report (TPR)

- Customer sends to DW for review, signs and sends to TAA

- DW should return to the student for corrections if:
  - Not all classes are listed
  - Instructor/advisor signatures are missing
  - All boxes are not checked
  - Electronic signature in the “digital signature box” accepted. Regular “typed” signatures will not be accepted.
  - Cannot say “N/A” or be blank-must have an answer
Training Progress Reports (TPR)

• If a customer sends TPR and gets no response, they can contact a different school official (top section) or the Dean of Students to have it completed.

• Failure to turn in TPR on time may result in a non-compliance letter.

• Failure to meet deadline on non-compliance letter may result in jeopardizing TRA/TAA benefits.

• TAA or DW may implement a 30-day TPR.
## TRAINING PROGRESS REPORT

While in TAA approved training you must maintain satisfactory academic standing and complete your training by the end date specified in your training plan. You are required to have this form completed every 60 days, or more frequently if requested by your Dislocated Worker Counselor. Send the completed form to your Dislocated Worker Counselor who will review, sign and then send to TAA.

Failure to complete the form and submit it in a timely manner may result in termination of your TAA benefits, cancellation of your Trade Readjustment Allowance (TRA) and/or Health Coverage Tax Credit (HCTC) benefits.

### Student Information

<table>
<thead>
<tr>
<th>Name (First M I Last)</th>
<th>Training Plan Start Date</th>
<th>Training Plan End Date</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>Training Facility</th>
<th>Training Program</th>
<th>Petition Number</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

### Advisor

**Have your advisor complete the following:**

1. Is the student maintaining satisfactory academic standing? Yes [ ] No [ ]
   Comments:

2. Is the student currently enrolled full-time? Yes [ ] No [ ]
   Comments:

3. Has the student dropped any classes this term? Yes [ ] No [ ]
   Comments:

4. Is it possible for the student to complete their training program by the end date listed above? Yes [ ] No [ ]
   Comments:

<table>
<thead>
<tr>
<th>School Official Signature</th>
<th>Title</th>
<th>Phone or Email</th>
<th>Date</th>
</tr>
</thead>
<tbody>
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</table>

### Instructors

**Have your instructor(s) complete the following:**

<table>
<thead>
<tr>
<th>Class</th>
<th>Satisfactory Progress?</th>
<th>Are requirements for participation or attendance being met?</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes [ ] No [ ]</td>
<td>Yes [ ] No [ ]</td>
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<td>Yes [ ] No [ ]</td>
<td>Yes [ ] No [ ]</td>
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<td>Yes [ ] No [ ]</td>
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<td>Yes [ ] No [ ]</td>
<td>Yes [ ] No [ ]</td>
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<td>Yes [ ] No [ ]</td>
<td>Yes [ ] No [ ]</td>
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<thead>
<tr>
<th>Instructor Signature</th>
<th></th>
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</table>

### Dislocated Worker Counselor Signature

Review the Training Progress Report, sign/date and forward to appropriate TAA Specialist.

<table>
<thead>
<tr>
<th>DW Signature</th>
<th>Date</th>
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</table>
Computers and Tools

- TAA will send customer a technology application after training plan approval.

- A copy of the school’s technology requirements must be attached.

- A tool list should be included with application (if available).

- A tool quote will be required for TAA to order tools (but not required with initial application).

- Computer is ordered 2 wks prior to training start; tools are ordered 4 wks prior to training start.
Internet Reimbursement

TAA Internet Reimbursement for Customer

Customer Name ___________________________ WF1 ID ___________________________

Customer Address ___________________________ City, State, Zip ___________________________

Supplier ID ___________________________ PO Number ___________________________ Amount $25.00

Billing Cycle Dates ___________________________ Partial or Final Payment ___________________________

Supporting Documents Required for Reimbursement:

• Copy of customer’s payment source (last 4 digits on card)
• Bank or card statement showing payment
• Receipt from internet service company

Please email this form with the Supporting Documents to deed.taa@state.mn.us
Supplemental Assistance

• New terminology “supplemental assistance” = travel and subsistence

• Provides payment for travel and subsistence for training outside of the worker’s commuting area

• Need must be documented in the worker’s Individual Employment Plan (IEP) or case file
Transportation

• Reimbursement starts after mile 15 (outside the local commuting area)

• Only paid for days on customer’s class schedule or with supplemental documentation (ie: internships)

• Cannot pay for sick or snow days or for project work outside the days listed on class schedule

• If customers carpool then only one customer gets the reimbursement

• Customer sends biweekly form to general mailbox with CC to TAA Specialist
Subsistence Payments

- Covers costs of temporary living quarters while in TAA-funded training (meals, incidentals)

- Made in lieu of daily commuting transportation payment

- Payments made for days that customer attends scheduled class

- Amount = Lesser of:
  - Worker’s actual expenses
  - 50% of the per diem rate authorized under the Federal Travel

- Subsistence is paid weekly instead of biweekly
Map example-Google-show all routes
### Trade Adjustment Assistance Transportation Agreement

**Name** ________________________________  **Petition Number** __________

**Home Address**

<table>
<thead>
<tr>
<th>Training Facility Name</th>
<th>Training Facility Address</th>
<th>Miles Round Trip</th>
<th>Federal Mileage Rate</th>
<th>Training City’s Per Diem Rate</th>
</tr>
</thead>
<tbody>
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Based on 20 CFR § 618.640(d): A trade-affected worker must be reimbursed for transportation expenses when commuting to and from a training facility located outside the worker’s commuting area. Transportation expenses, funded by the TAA Program, are payable only for the actual days traveled. Mileage eligible for reimbursement is, round-trip, from the first mile outside the boundary of the worker’s commuting area to the location of the training facility.

**The customer will be paid the lower amount:**

1. The number of miles they will drive round trip to and from school, minus 30 miles, then multiplied by the current federal mileage rate OR
2. Daily subsistence allowance (50% of local Per Diem [https://www.gsa.gov/travel-resources](https://www.gsa.gov/travel-resources))

<table>
<thead>
<tr>
<th>Miles Counted (round trip miles – 30 miles)</th>
<th>Federal Mileage Rate x Miles Counted ($)</th>
<th>OR</th>
<th>50% Per Diem ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$0.56 x</td>
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</tbody>
</table>

Your allowance per day of attended scheduled class $__________

Transportation Allowance Begins ____________ and ends ____________
### FY 2021 Per Diem Rates for Minnesota

[Online resource](https://www.naco.org/).

**Lodging by month (excluding taxes) | October 2020 - September 2021**

Cities not appearing below may be located within a county for which rates are listed. To determine what county a city is located in, visit the [National Association of Counties (NACO) website](https://www.naco.org/).

<table>
<thead>
<tr>
<th>Primary Destination</th>
<th>County</th>
<th>2020 Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>2021 Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Rate</td>
<td>Applies for all locations without specified rates</td>
<td>$96</td>
<td>$96</td>
<td>$96</td>
<td>$96</td>
<td>$96</td>
<td>$96</td>
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</tr>
<tr>
<td>Duluth</td>
<td>St. Louis</td>
<td>$165</td>
<td>$121</td>
<td>$121</td>
<td>$121</td>
<td>$121</td>
<td>$121</td>
<td>$121</td>
<td>$165</td>
<td>$165</td>
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</tr>
<tr>
<td>Eagan / Burnsville / Mendota Heights</td>
<td>Dakota</td>
<td>$100</td>
<td>$100</td>
<td>$100</td>
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<tr>
<td>Rochester</td>
<td>Olmsted</td>
<td>$133</td>
<td>$133</td>
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</table>

Showing 1 to 5 of 5 entries

### Meals & Incidentals (M&IE) Breakdown
Biweekly Transportation Form

TAA Transportation & Subsistence Form

Important: Send a copy of your class registration to deed.taa@state.mn.us at the beginning of every term.

Name ___________________________ PO Number ___________________________

Payment Address ___________________________ Petition Number ___________________________

Dates of Term 1/11/2021-6/30/2021 Per Diem □ Mileage □

88RT mi x $0.56 = $49.28

Directions: Click on the highlighted box and choose the correct date. If you print this form, write in the correct date. Do this for each day you attend TAA-approved training during the two-week period. Make sure the day and date are accurate or there could be a delay in receiving your benefits.

Two week period start date ___________________________ End date ___________________________

<table>
<thead>
<tr>
<th></th>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
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<tr>
<td>Week 2</td>
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</tbody>
</table>

By submitting this form to the TAA Unit, you understand (check both boxes):

□ The law provides penalties for willful misrepresentation made to obtain benefits

□ Travel and subsistence allowances are only payable for the distance approved in the contract. I will immediately notify a TAA Specialist if my travel distances change
Occupational Skills Training

Before Training
- Work with Dislocated Worker (DW) Counselor:
  - Complete assessments
  - Submit training waiver, if appropriate
  - Research careers and labor market information
  - Research training institutions
  - Select employment goal

During Training Reporting
- Maintain contact with your counselor every 30 days
- Submit to your DW Counselor and TAA:
  - Class schedule before each term
  - Training Progress Report every 60 days (or sooner if requested)
  - Grades after each term

During Training Challenges
- Notify your counselor - before you:
  - Withdraw from a class
  - Drop out of training
  - Drop below full-time status
- If you:
  - Determine you will not complete training as TAA approved
  - Need a tutor

After Training
- Submit to your DW Counselor and TAA:
  - Copy of final grades
  - Copy of transcript (showing degree awarded) OR Credential
  - Utilize Job Search Allowance, Relocation Allowance, or RTAA (if applicable)

- Discuss any additional TAA benefits while you maintain regular contact with your customer:
  - Reemployment Trade Adjustment Assistance (RTAA)
  - Job Search Allowance
  - Relocation Allowance
- Capture credential in WF1

Key to hyperlinks: *italic* – within document

Revised October 2019
Counselor Portal – a resource for YOU!

- [https://mn.gov/deed/programs-services/dislocated-worker/counselors/](https://mn.gov/deed/programs-services/dislocated-worker/counselors/)
- News and Events - Partner Express newsletter
- Resources – materials from today’s training
- Policy and Guidance
- Key Contacts – TAA, DW, ACP, and DW Service Providers
- Forms - applications
Resources for DW: Counselor Portal

For Counselors and Service Providers

Our Dislocated Worker, Trade Adjustment Assistance and Workforce Investment Act Adult programs rely on counselors and staff located across the state at WorkForce Centers and contracted independent organizations.

Here, we provide information to help counselors and service providers administer the programs and better serve clients.

**News and Events**
The latest activities, current projects, and several newsletters.

**Resources**
Presentations, glossaries and frequently asked questions.

**Policy and Guidance**
Requirements and guidance materials.

**Key Contacts**
Staff contacts, service providers, and CareerForce locations.

**Forms**
The forms and materials needed to administer the programs.
Counselor Portal News and Events

News and Events
for Dislocated Worker, Adult Career Pathways and Trade Adjustment Assistance (ACP and TAA) Service Providers

Get the latest news bulletins, event updates, program developments, and professional insights for Dislocated Worker, Adult Career Pathways and Trade Adjustment Assistance (ACP and TAA) program counselors and service providers.

Partner Express Newsletter

Partner Express is a monthly resource for Dislocated Worker, Adult Career Pathways and Trade Adjustment Assistance (ACP and TAA) program service providers. Select the links below to view, download or print current and past issues.

2021
- February
- January

2020
- December
- November
- October
- September
- August
Resources
for Dislocated Worker program counselors and service providers

Presentations

Trade Adjustment Assistance (TAA) Roundtable Tours

2019 TAA Roundtable Tour
- General PowerPoint Roundtable 2019
- Case Management Model
- Training Progress Report
- Sample TAA Application
- DW Counselor/Customer Checklist for Relocation Allowance
- DW Counselor/Customer Checklist for Job Search Allowance
- Performance FAQs

2018 TAA Roundtable Tour
- General PowerPoint Roundtable 2018
- SRRT Process Overview PowerPoint
Counselor Portal Forms

Forms
Here we offer these frequently requested forms and tools. Select the link to download, print or save to your computer.

<table>
<thead>
<tr>
<th>TRADE ADJUSTMENT/READJUSTMENT ASSISTANCE FORMS</th>
<th></th>
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<tbody>
<tr>
<td>Apprenticeship Agreement</td>
<td>Word</td>
</tr>
<tr>
<td>On-the-Job Training Contract</td>
<td></td>
</tr>
<tr>
<td>On-the-Job Training Cover Letter</td>
<td>PDF</td>
</tr>
<tr>
<td>RTAA Application</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Computer and High Technology Tools Request</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Counselor Handbook</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Customer Handbook 2015 Law (Petitions 85,000+)</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Job Search Allowance Application</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Mileage Reimbursement Application</td>
<td>Contact Program Staff</td>
</tr>
<tr>
<td>TAA Relocation Allowance Application</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Training Application</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Training Modification Application</td>
<td>Word</td>
</tr>
<tr>
<td>TAA Training Progress Report</td>
<td>PDF</td>
</tr>
<tr>
<td>TAA Training Waiver of Training Form and Instructions</td>
<td>PDF</td>
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<tr>
<td>TRA Eligibility during Summer Breaks</td>
<td>PDF</td>
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<tr>
<td>TRA Handbook (Petitions 81,000+)</td>
<td>PDF</td>
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</tbody>
</table>
Counselor Portal Key Contacts

Key Contacts
Here is contact information for staff who administer the Dislocated Worker Program (DWP) and the Trade Adjustment Assistance (TAA) program, a directory of DWP service providers and CareerForce locations.

State Contacts
Find the staff who administer the Dislocated Worker and the Trade Adjustment Assistance programs.

CareerForce
Get expert job-search and career-planning advice. Sign-up for workshops. Join networking groups and job clubs.

DWP Service Providers
Find a DWP service provider near you.
Final Questions & Answers

• Certificate of Training Attendance
• Watch for a survey via email soon
• Final Questions & Answers
• Thanks for attending!
Contact us!

- **Minnesota TAA Program**
  - Email: [DEED.TAA@state.mn.us](mailto:DEED.TAA@state.mn.us)
  - Applications: [www.mn.gov/deed/taa](http://www.mn.gov/deed/taa)
  - Phone: 651-259-7543, 1-888-234-1330
  - Fax: 651-296-0288

- **Minnesota TRA Unit**
  - Email: [DEED.TRA@state.mn.us](mailto:DEED.TRA@state.mn.us)
  - Phone: (ask for a TRA Specialist) 651-296-3644, 1-877-898-9090

- **TAA in other states:**
  [www.doleta.gov/tradeact](http://www.doleta.gov/tradeact)