



Department of
**Labor & Workforce
Development**

2016 TAA/WIOA Conference

TAA Case Management, IEP, Benchmarks &
Measurable Skills Gain



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**Labor & Workforce
Development**

Trade Adjustment Assistance Case Management

TAA Case Management

- When does the Case Management process start for a Trade Affected Worker?
 - The Initial Assessment (The VERY FIRST TIME they meet with you)
- When does the Case Management process end for a Trade Affected Worker?
 - Once they have obtained unsubsidized suitable employment

TAA Case Management

Case Notes are an essential part of Case Management.

- Document EVERYTHING!
 - if you don't document it, it didn't happen!
- BUT, there is no need to duplicate case notes, they will carry across all parts of Jobs4TN.
- Documents should be uploaded with case notes whenever possible.
- Educational background is required for any participant with training beyond high school (or equivalent).
- If the worker is employed, current employment information including salary must be documented.

TAA Case Management

Trade Adjustment Assistance Application for Services

- PIRL (Participant Individual Record Layout)
 - Remember to complete all fields of the PIRL tab in the TAA Application, they are required for federal reporting.

Start Page	Contact Information	Demographic Information	Veteran Information	Individual Employment	Public Assistance
Individual Barriers	PIRL	Application Eligibility	Application Participation		



PIRL

Category of Disability : Participant did not disclose type of disability ▼

UI Referred By Status: Not Applicable ▼

Highest School Grade completed: 12 school grades completed ▼

Highest Education Level completed:
Attained high school diploma ▼

☐ Yes ☒ No

☐ Yes ☒ No

Single Parent (including single pregnant women): ☐ Yes ☒ No ☐ Participant did not self-identify

TAA Case Management

Trade Adjustment Assistance Application for Services

- TAA Liable/Agent State
 - We will be *BOTH* the Liable & Agent state when the petition is from our state and requesting services in our state (this is the most common result).
 - We will be the *Agent* state when the petition is from another state, and the participant is requesting services in our state.
 - We will be the *Liable* state when the petition is from our state, BUT the participant is requesting services in another state (you will not see this in the AJC/Career Centers).

* TAA Liable/Agent State	Both ▼
* TAA Liable/Agent State	Liable State ▼
* TAA Liable/Agent State	Agent State ▼



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Trade Adjustment Assistance Individual Employment Plan (IEP)

TAA Individual Employment Plan (IEP)

- One goal & many objectives to reach that goal.
- Create the *entire IEP* during the initial visit.
- ALL TRADE SERVICES REQUIRE AN IEP.
- Objectives need to have certain key words:
 - Job search, request training, assessment, enroll in training, official request date, start training, 60 day progress review/meeting benchmarks, notify of any changes, complete training/receive credentials, job search, suitable employment.
- It is a requirement that we document all benchmarks in the IEP, in addition to completing a benchmark and creating measurable gains.
- You will close *objectives* as they are completed.

TAA Individual Employment Plan (IEP)

General Information:

Plan ID:

User ID:

Name: Smith, John

Plan was started on: 12/12/2016

Plan was started in office location: American Job Center - Dyersburg

Plan closed on:

Goals and Objectives Established:

Goal #	Program Affiliation (s)	Type of Goal	Term of Goal	Date Established	Estimated Date of Completion	Actual Completion Date	Status
1	TAA	Employment	Long Term	12/12/2016	12/12/2018		Open
Goal Description: Unsubsidized Suitable Employment							
Comments: Mr. Smith will enroll in HVAC training at TCAT Newbern and obtain credential to make job ready in a demand field which will enable Mr. Smith to obtain unsubsidized suitable employment.							
Objectives to Goal #1							
Objective			Date Established	Review Date	Program	Staff	Status
Initial Assessment			12/12/2016	01/26/2017	TAA	Franklin, Jamie	Closed
Comments: Will complete initial assessment. Update: 12-12-2016 talked with career center staff about employment opportunities.							
Job Search			12/12/2016	01/26/2017	TAA	Franklin, Jamie	Closed
Comments: Mr Smith will complete a job search. Update: 12-12-2016 Completed job search, resume builder & virtual recruiter. No suitable employment was available.							
Request Training			12/12/2016	01/26/2017	TAA	Franklin, Jamie	Closed
Comments: 12/12/2016 - Mr. Smith requested training in HVAC field at TCAT Newbern.							
Refer for Training Assessment			12/12/2016	01/26/2017	TAA	Franklin, Jamie	Closed
Comments: Will refer to WIOA/LWDA partners for TABE Assesment. Update: 12-12 -2016 Contacted LWDA Partner Staff to set up an assessment appointment.							
Will Recieve Assesment Scores			12/12/2016	01/26/2017	TAA	Franklin, Jamie	Closed
Comments: Will recieve scores and recomentation from WIOA/LWDA. Update :12-12-2016 LWDA Partner notified that Mr. Smith completed assessment and is recommended training.							
Will Enroll in Training			12/12/2016	01/26/2017	TAA	Franklin, Jamie	Closed
Comments: Mr Smith will enroll in training. Was given the list of required inforamtion to take to the school. Update: 12/12/2016 John Doe provided acceptance, waiting list letter, or cost and academic plan for planned training from training provider with a start date of 3/1/2016. 12/12/2016 is the official request date.							
Will Recieve Determination			12/12/2016	01/26/2017	TAA	Franklin, Jamie	Open

Smith, John (User ID: JCSMITHUR); Print Date: 12/12/2016; Printed By: Jamie Franklin

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Comments: Will receive determination from TAA Specialist.

Will Begin Training	12/12/2016	01/26/2017	TAA	Franklin, Jamie	Open
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Comments: Will verify with school that student started training as planned on 3/1/2017.

Will Report Every 60 Days for Benchmark	12/12/2016	01/26/2017	TAA	Franklin, Jamie	Open
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Comments: Mr. Smith will report for benchmark/progress review a minimum of every 60 days. Will provide grades, next term cost sheet & course outline, and academic calendar at the end of each term. Will maintain satisfactory progress throughout training and stay on track to complete training as scheduled.

Will Notify of Any Changes	12/12/2016	01/26/2017	TAA	Franklin, Jamie	Open
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Comments: Will notify TAA Representative of any changes throughout training.

Will Complete Training	12/12/2016	01/26/2017	TAA	Franklin, Jamie	Open
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Comments: Mr. Smith will complete training in HVAC and receive diploma. Mr. Smith will provide a copy of credential to TAA Representative.

Job Search Assistance	12/12/2016	01/26/2017	TAA	Franklin, Jamie	Open
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Comments: Will contact AJC Representative for job search assistance/allowance in credentialed field. TAA Representative will recommend Job Search Allowance to assist in job search & interviews.

Will Obtain Suitable Employment	12/12/2016	01/26/2017	TAA	Franklin, Jamie	Open
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Comments: Mr. Smith will obtain unsubsidized suitable employment in credentialed field.

Signatures

Applicant Signature	Date	Parent/Guardian Signature	Date
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Staff Signature	Date
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Smith, John (User ID: JCSMITHUR); Print Date: 12/12/2016; Printed By: Jamie Franklin

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Trade Adjustment Assistance Benchmarks/Progress Reports


TAA Benchmarks/Progress Reports

- Benchmarks/Progress Reports are required at a minimum of every 60 days while a participant is in TAA Approved training.
- Schedule the next benchmark/progress report during current visit.
- Can be conducted via phone - but the paperwork must be signed and sent back to you by email.
- End of term benchmarks require:
 - Grades or transcript, next term cost sheet & course outline, and academic calendar (for each new calendar year).
- Benchmarks must be documented in the IEP as well as in case notes, and the Training Benchmark View in Jobs4TN.
- If, at any time, a participant is not meeting benchmarks notify your TAA Specialist.

TAA Benchmarks/Progress Reports

Training Benchmark Information

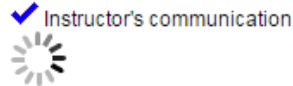
* Beginning Date of Benchmark Period: 10/08/2016  [Today](#)

* Ending Date of Benchmark Period: 11/29/2016  [Today](#)

* Is maintaining satisfactory academic standing (e.g. not on probation or determined to be "at risk" by the instructor or institution)? ☒ Yes ☐ No

* Is scheduled to complete training within the timeframes identified in the approved training plan? ☒ Yes ☐ No

Supporting evidence for the above [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]



* Review Date: 11/29/2016  [Today](#)


Create Date: 11/29/2016 12:34:21 PM

Created By: 3302089

Last Edit Date: 11/29/2016 12:45:20 PM

Last Edited By: 3302089

Case Notes: [[Add a new Case Note](#) | [Show Filter Criteria](#)]

ID	Create Date	Subject	Action
46730819	11/29/2016	60 day follow up	Edit 

Page 1 of 1 Rows: 100

TAA Benchmarks/Progress Reports

Case Note Type:

* LWIA/Region:

* Office Location:

* Program:

App ID:

Partner Program:

* Subject:

Contact Type:

* Case Note Description:

Received grades from she is doing well in classes and continues to strive.
signed her benchmarks

[[Spell Check](#)]

Message Options

☐ Create Message From Case Note on Save

Case Note Attachment(s)

Listed below are the documents associated with this case note. Click the *View* link below to view that particular item.

Results View: **Summary** | [Detailed](#)

Click a column title to sort.

☐ View Thumbnails

Document Name	Category	Size	Modify Date	Action	
nd_grades.pdf	Case Note	315 KB	12/07/2016 08:24	View	Edit
				Delete	Meta Data



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Trade Adjustment Assistance Create Measurable Skills Gain

TAA Create Measurable Skills Gain

- All participants in TAA Approved training require Measurable Skills Gains to be documented in Jobs4TN.
- Complete Create Measurable Skills Gain for EVERY benchmark.
- Complete the required field and save, no need to print or sign.
 - For TAA Approved training, you will choose “skills progression” as the skill type.

TAA Create Measurable Skills Gain

Create Measurable Skills Gain

Date Achieved	Skill Type	Last Edited By	Last Edited Date	Action
11/01/2016	Skills Progression	Moore, Theresa (3302089)	11/1/2016 8:49:08 AM	Edit
11/01/2016	Skills Progression	Moore, Theresa (3302089)	11/1/2016 8:50:31 AM	Edit

Skill Attainment Information

Fill in the following information for the skill achievement.

Program: Trade Adjustment Assistance (TAA) Program

* Skill Type:

* Date Skill Attained:  [Today](#)

* Type of Achievement:

* [\[Verify \]](#) [\[Scan \]](#) [\[Upload \]](#) [\[Link \]](#)

Staff Information

[\[Add a new Case Note \]](#) [\[Show Filter Criteria \]](#)

ID	Create Date	Subject	Action
No data found.			

Save

Cancel



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