



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.

Company Name	Job Title	Credential Needed	Experience Needed	Base Pay

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.

School	Program	Start date	End date	Total credits	Cost per Credit	Total cost	Miles (one-way)

***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		
Name (First MI Last)	Training Plan Start Date	Training Plan End Date
Training Facility	Training Program	Petition Number

Advisor			
Have your advisor complete the following:			
1. Is the student maintaining satisfactory academic standing? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Comments:			
2. Is the student currently enrolled full-time? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Comments:			
3. Has the student dropped any classes this term? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Comments:			
4. Is it possible for the student to complete their training program by the end date listed above? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Comments:			
School Official Signature	Title	Phone or Email	Date

Instructors				
Have your instructor(s) complete the following:				
Class	Satisfactory Progress? (progress toward grade of C or higher)	Are requirements for participation or attendance being met?	Comments	Instructor Signature
	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		
	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		
	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		
	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		
	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		
	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		

Dislocated Worker Counselor Signature	
Review the Training Progress Report, sign/date and forward to appropriate TAA Specialist.	
DW Signature	Date

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	<input type="text"/>	WF1 ID	<input type="text"/>
Customer Address	<input type="text"/>		City, State, Zip <input type="text"/>
Supplier ID	<input type="text"/>	PO Number	<input type="text"/>
		Amount	<input type="text" value="\$25.00"/>
Billing Cycle Dates	<input type="text"/>	Partial or Final Payment	<input type="text"/>

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

The screenshot displays the Google Maps interface for a route from Austin, Minnesota (55912) to Elkton, Minnesota. The search bar shows the origin and destination. Below the search bar, there are icons for different transport modes: car, train, walking, bicycle, and airplane. The 'Leave now' dropdown is set to 'Leave now'. The 'OPTIONS' button is visible. Below the search bar, there is a button to 'Send directions to your phone'. The main content area shows two route options:

- via I-90 E**: Fastest route, the usual traffic. **17 min**, 14.4 miles. This route is highlighted in blue on the map.
- via I-90 E and 200 St/200th St**: **20 min**, 16.7 miles. This route is highlighted in grey on the map.

A third route is also visible on the map, highlighted in orange, with a callout box showing **21 min** and 15.8 miles. The map shows the route from Austin, Minnesota, passing through Nicolville, and ending at Elkton, Minnesota. The Google logo is visible in the bottom right corner of the map.

Transportation

Trade Adjustment Assistance Transportation Agreement

Name _____ Petition Number _____

Home Address _____

Training Facility Name	Training Facility Address	Miles Round Trip	Federal Mileage Rate	Training City's Per Diem Rate

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>)

Miles Counted (round trip miles – 30 miles)	Federal Mileage Rate x Miles Counted (\$)	OR	50% Per Diem (\$)
	\$0.56 x		

Your allowance per day of attended scheduled class \$ _____

Transportation Allowance Begins _____ and ends _____

Per Diem

FY 2021 Per Diem Rates for Minnesota

gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-lookup

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](#) (a non-federal website).

CSV Print

Primary Destination	County	2020 Oct	Nov	Dec	2021 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Standard Rate	Applies for all locations without specified rates	\$96	\$96	\$96	\$96	\$96	\$96	\$96	\$96	\$96	\$96	\$96	\$96
Duluth	St. Louis	\$165	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$165	\$165	\$165	\$165
Eagan / Burnsville / Mendota Heights	Dakota	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100
Minneapolis / St. Paul	Hennepin / Ramsey	\$148	\$148	\$148	\$148	\$148	\$148	\$148	\$148	\$148	\$148	\$148	\$148
Rochester	Olmsted	\$133	\$133	\$133	\$133	\$133	\$133	\$133	\$133	\$133	\$133	\$133	\$133

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	<input type="text"/>	PO Number	<input type="text"/>
Payment Address	<input type="text"/>	Petition Number	<input type="text"/>
Dates of Term	<input type="text" value="1/11/2021-6/30/2021"/>	Per Diem <input type="checkbox"/>	<input type="text" value="88RT mi x \$0.56= \$49.28"/>
		Mileage <input checked="" type="checkbox"/>	

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	<input type="text"/>	End date	<input type="text"/>
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	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Week 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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



Customer

Before Training

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

- With your customer:
- Review assessments and [six eligibility criteria](#)
 - Complete the [eight case management services](#)
 - Develop employment plan (activate in WF1)

Submit completed training application or waiver with application checklist items to DEED.TAA@state.mn.us

If applicable, open waiver activity in WF1 and send to TRA

Review training application and request additional information from DW Counselor if needed

Send approval email to customer and DW Counselor

Open Occupational Skills Training activity and related activities in WF1

Send copy of approved training application to TRA

Request purchase order and submit to the training institution

Dislocated Worker Counselor

TAA Specialist

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

Maintain contact with your customer every 30 days and document the contact in WF1

Review [Training Progress Reports](#) and send to TAA Specialist

- Keep records of your customer's:
- [Class schedule](#)
 - [Grades](#)
 - [Training Progress Report](#)

Discuss additional benefits including [Health Coverage Tax Credit](#), [On-the-Job Training](#), [RTAA](#), and [Job Search Allowance](#)

If applicable, revoke the waiver and close the waiver activity in WF1

- Document receipt of:
- [Class schedule](#)
 - [Grades](#)
 - [Training Progress Report](#)

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

Review [Training Progress Reports](#) for accuracy and completeness

Customer should fix the following TPR errors:

- Incorrect or blank responses in top section
- No training end date
- Any questions are blank, state "N/A", or do not answer the questions

Review with customer any grades below a "C" to determine circumstance and communicate with TAA Specialist

Notify TAA Specialist if the customer has challenges, needs a tutor, or needs a plan modification

Discuss challenges and identify possible outcomes

Review requests for tutor and modifications

Discuss and determine, with the counselor, whether training can continue

Send non-compliance notification when appropriate

Notify TRA if customer does not correct non-compliance requirements or if training modification is approved

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:

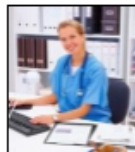
- [Reemployment Trade Adjustment Assistance \(RTAA\)](#)
- [Job Search Allowance](#)
- [Relocation Allowance](#)

Capture credential in WF1

Close Occupational Skills Training activity in WF1. Process applications for additional TAA benefits

Close the customer from TAA when:

- Credential has been received
- Customer is no longer using/or won't be using additional TAA benefits
- All invoices have been paid



Counselor Portal – a resource for YOU!

- <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

Success Stories

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](#)

Counselor Portal Resources

Resources

for Dislocated Worker program counselors and service providers

WIOA Certification Process

Presentations

TAA Program Materials

TAA Glossary

FAQs

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 Policy and Guidance

POLICY AND GUIDANCE

Search for a policy

Or, browse the list of policies

Click on '+' to see all topics and policies

Mouse over or for Screen Reader users tab onto the Policy title link to read the description.

- [-] **Employment and Training Programs**
 - [+] **Administration and Operations**
 - [+] **Adult (WIOA)**
 - [+] **CareerForce**
 - [+] **Dislocated Worker (WIOA & State)**
 - [+] **Displaced Homemaker**
 - [+] **Foreign Labor Certification**
 - [+] **Migrant and Seasonal Farmworker**
 - [+] **Multi-Program Administration Requirements**
 - [+] **Rapid Response**
 - [+] **Senior Community Service Employment**
- [-] **Trade Adjustment Assistance**
 - Appeals Process - TAA**
 - Apprenticeship Training**
 - Appropriate Use of Waivers**
 - Approval of Classroom Training**
 - Choice of Training Institutions**
 - Closeout Policy**
 - Computers and High Technology Tools**
 - Definition of Suitability of Employment**
 - Entrepreneurial Activities - 14**
 - Follow-up Requirements**
 - GED/ESL Training Plans**
 - One Time Poor Performance (Training, OJT, Apprenticeships)**
 - Registration of Resume on MinnesotaWorks.net**
 - Sources of Labor Market Information (LMI)**
 - Tools and Supplies**
 - Use of Labor Market Information in Approving TAA Supported Programs**
 - Use of Scholarships/Institutional Grants - 13**

Counselor Portal Forms

Forms

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

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

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.

[DWP Service Providers](#)

Find a DWP service provider near you.

[CareerForce](#)

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

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
 - Applications: 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
 - Phone: (ask for a TRA Specialist)
651-296-3644, 1-877-898-9090
- TAA in other states:
www.doleta.gov/tradeact