

Trade Adjustment Assistance (TAA) Criteria for Training Approval Checklist

The checklist alone is not sufficient documentation to approve training. Each criterion must be supported with the prescribed documentation in the client's case file and/or CTHires. Training can only be approved if it is determined that all of the 6 criteria are met.

Client Name:

TAA Company:

Criterion 1. There is no suitable employment available for the trade-affected worker.

- Suitable work is available to the worker. If suitable employment is available, training cannot be approved.
- Suitable work *is not available* to the worker.

Important: Attach the Suitable Employment Desk Aid from Procedural Memo 22-02 to support the finding that suitable employment **is or is not** available.

Criterion 2. The trade-affected worker would benefit from appropriate training. *All boxes must be checked in order to meet this criterion.*

- Training will increase the chances of obtaining employment at higher wages than in the absence of training.
- The worker will be job ready at the completion of training.
- The worker has the knowledge, skills, and abilities to undertake, make satisfactory progress in, and complete the training program.
- Supporting evidence using assessments conducted, LMI, counseling, etc., of meeting these criteria is present in the worker's case file with case notes and documented in the IEP.

Criterion 3. There is a reasonable expectation of employment in the worker's commuting area (or in the area where the worker intends to relocate) upon completion of the training, based on projections of job market conditions expected to exist at the time of completion.

- Yes. The projected labor market information does support a reasonable expectation of employment and is documented in the worker's case file.
- No. Labor market information does not support a reasonable expectation of employment upon completion of training and is documented in the worker's case file.

Criterion 4. Training is reasonably available to the trade-affected worker.

- Training is available within the worker's commuting area (41 miles).
- Training is not available within the worker's commuting area but is available outside the commuting area. (Training outside the commuting area requiring transportation or subsistence payments that *add substantially* to the total cost of the training program may not be approved if another appropriate training is available in the commuting area at a lower cost).
- Training is not reasonably available within or outside the worker's commuting area.

Criterion 5. The trade-affected worker is qualified to undertake and complete such training.

- Yes. Through the assessment process and documented on the IEP, the worker's knowledge, skills, abilities, educational background, and work experience indicates the worker is qualified to undertake and complete the specific training program being considered.
- No. The worker is not qualified to undertake and complete the training. Must document on IEP/case notes.
- Yes. The worker's financial resources (including UI and TRA and financial aid, personal or family resources if the training duration exceeds the period covered by UI and TRA) are adequate to undertake and complete the specific training program being considered. Complete the TAA-6.
- No. Financial resources are not adequate to undertake and complete training. Support with case notes/TAA-6.

Criterion 6. Training is suitable for the trade-affected worker and available at a reasonable cost. All boxes must be checked in order to meet this criterion.

NOTE: Reasonable cost means that training must not be approved at one provider when, all costs being considered, training better or substantially similar in quality, content, and results can be obtained from another provider at a lower total cost within a similar time frame.

Higher cost training may be approved if it is reasonably expected to result in a higher likelihood of employment, employment retention, or greater earnings or to return the worker to employment in a significantly shorter duration. This will require additional supporting documentation.

- The training is suitable, meaning the training is appropriate given the worker's knowledge, skills and abilities, background, and experience relative to the worker's employment goal.
- A comparison of similar training programs (JS-50, other research as needed) indicates the costs of the proposed training is similar to the others.
- Related expenses are necessary for the worker to complete the training.

In the comments section below, if a recommendation to deny is made, state the reason(s) why. Also, if additional considerations are requested for any of the criteria above, please explain/justify them below.

Career Development Specialist Recommendation: <input type="checkbox"/> Approve <input type="checkbox"/> Deny Enter Comments Below:
Click or tap here to enter text.

Career Development Specialist Signature:

Date signed:

References: §618.610 – Criteria of Approval, Training policy 13-01