

# TAA Case Management Training Syllabus

Two-day session

9:00 a.m. to 4:00 p.m. CST

## Training Site Address

[WIT Case Management Training Site.](#)

## What is TAA?

The Trade Adjustment Assistance (TAA) program provides federally funded reemployment benefits to workers whose jobs have been impacted by foreign imports and trade. In addition to TAA, workers may be eligible for related programs such as Alternative Trade Adjustment Assistance (ATAA). The ATAA programs focus on workers 50 years of age or older who return to positions paying less than their trade-impacted employment.

Training attendees will receive hands-on, instructor-led training that enables them to engage in the knowledge transfer process and to practice using the actual system construct in a **test-data** environment.

## Course Objectives:

Utilizing the WIT system, this course is designed to train staff on how to case manage TAA program participants. Staff will also learn how to:

- Manage the TAA Eligible Worker Layoff List to assist individuals tied to approved TAA petitions.
- Complete the TAA program application to manage formula eligibility determination for a program applicant.
- Complete the TAA participation form to formally establish the applicant's program begin date.
- Complete an Individual Employment Plan (IEP) to set client goals and objectives for program service strategy.
- Enroll the client into program services.

- Submit TAA training waivers for State approval.
- Manage the TAA training waiver review process monthly.
- Revoke TAA training waivers when training becomes available for the program participant.
- Complete a TAA training application to validate and approve training requests.
- Perform training benchmark reviews to confirm the participant's status.
- Manage TAA/TRA program benefit payments for the participant.
- Document the participant's measurable skills gain by entering their skill achievement and achievement type.
- Document and manage changes in the participant's educational functioning level.
- Prepare the participant for the soft exit process by closing services, plan goals and plan objectives that remain open.
- Complete the program closure form to end the delivery of planned program services.
- Explore the program Exit/Outcome routine should the participant satisfy a global exclusion.

**Prerequisite:**

1. View the TX WIT System Overview Training Video (recommended):  
[TX WIT System Overview Training Video.](#)
2. Complete Cross Program Content training.