**Purpose – To detail the process for the first in-person appointment with a TAA eligible individual**

**Process Name – TAA Initial Assessment Date/Version – 08/16/18**

Standard of Work

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| **Step** *(1,2,3..)* | **Process Step** *(list of the critical process steps)* | **Dialogue** *(clear and simple descriptions, appropriate level of detail for the task)* |
| **1.** | **Review customer’s registration in AJC system** | The following sections must be reviewed and completed thoroughly:   * + Participant demographics   + Employment History, complete and up-to-date   + Education recorded   + TAA information complete and accurate     - Trade Affected Employer     - Petition number     - Date of lay-off     - O\*Net Code (Occupation Code) for position person was in when laid-off     - NAICS code (Industry Code)     - Tenure with employer     - Wage at lay-off |
| **2.** | **Review TAA program benefits and services** | Review correct TAA Overview (TAA-1062A) with customer, explaining the program benefits and services; ensure understanding of deadline dates   * + Sign and Date Overview (customer & counselor)   + Copy for customer to take; original in file |
| **3.** | **Develop Individual Employment Plan** | * Complete detailed IEP in system with customer * If customer has taken TABE or Pesco Sage with WIOA – enter test results * Complete TAA/WIOA Referral – copy to customer; original in file; e-mail to WIOA Case Manager * If Employment Plan includes training or customer expresses an interest in training, assist with researching Training Providers and provide the Training Program Comparison Work Sheet. |
| **4.** | **Required Services to be entered in AJC system** | * + Initial Assessment   + Development of an Employment Plan   + Career Guidance   + Referral to WIOA   + Participated in Rapid Response (if applicable) |
| **5.** | **Documentation** | Document detailed case note to include TAA participant’s lay-off details, skills, education level, interests, skill, potential barriers, strengths, services and benefits of interest, plan for proceeding, etc.  Schedule follow-up appointment |
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