TAA Folder Checklist

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Last four SS#: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **Contact Information/Documents Section** | | |
|  | **Documents in File Match MWE (including dates)** | |
|  | **YES** | **NO** |
| Contact Information Sheet |  |  |
| Resume |  |  |
| Photo ID |  |  |
| Social Security Card |  |  |
| Birth Certificate |  |  |
| Selective Service (WIOA only) |  |  |
| Veteran Status (DD-214, if yes) |  |  |
| DOLETA Petition Printout (TAA Decision)  **Enter Petition # here \_\_\_\_\_\_\_\_** |  |  |
| Entitlement Determination to Trade (857 Form)  **Enter Date of First Qualifiying Separation here \_\_\_\_\_\_\_\_\_\_\_\_** |  |  |
| Pay Stubs/UI Determination Letter |  |  |
| MABS Z03 printout showing payments received |  |  |
| MABS F04 showing employment information & last day worked  **Enter Last Day Worked (LDW) from F04 here \_\_\_\_\_\_\_\_\_\_\_** |  |  |
| **Eligibility Section (printouts from MWE)** | **YES** | **NO** |
| TAA Application  **Application/Eligibility date \_\_\_\_\_\_\_\_\_\_\_\_\_** |  |  |
| WIOA/NEG Application if co-enrolled |  |  |
| MWE Wagner-Peyser Enrollment |  |  |
|  |  |  |
| **Assessments/IEP Section** | **YES** | **NO** |
| MWE Individual Employment Plan (IEP)  **Enter date here \_\_\_\_\_\_\_\_\_\_\_\_\_** |  |  |
| WIOA IEP if co-enrolled  **Enter date here \_\_\_\_\_\_\_\_\_\_\_\_\_\_** |  |  |
| MWE Printout of Basic Skills/Other Assessments taken |  |  |
| Career Assessment Results |  |  |
| Labor Market Research |  |  |
| **TAA Section** | **YES** | **NO** |
| Equal Opportunity is the Law |  |  |
| BIG 8 Form |  |  |
| 858 Forms |  |  |
| **Other Trade Benefits** | **YES** | **NO** |
| Job Search Allowance Forms |  |  |
| Relocation Forms |  |  |
| RTAA / ATAA forms  **(Enter start date here \_\_\_\_\_\_\_enter end date here \_\_\_\_\_\_\_)** |  |  |
|  |  |  |
|  |  |  |
| **Training Section** | **YES** | **NO** |
| Credential |  |  |
| Individual Training Contract (ITC)  **Enter start date here \_\_\_\_\_\_\_\_ enter end date here \_\_\_\_\_\_\_\_** |  |  |
| ITC Amended dates if applicable  **Amended start date here \_\_\_\_\_\_\_\_ amended end date here\_\_\_\_\_\_\_\_\_** |  |  |
| Additional Items Request Form |  |  |
| School Acceptance Training Letter (on school letter head) |  |  |
| Breakout of classes and cost of Training |  |  |
| Training Program Outline |  |  |
| Training Rules |  |  |
| Seven Criteria TAA Training Approval Form |  |  |
| DLLR Release of Education Records |  |  |
| **Other Training Documents** |  |  |
| Grades/transcript/progress report |  |  |
| Form 858A, for online training, if applicable |  |  |
| **WIA/NEG Section if co-enrolled** | **YES** | **NO** |
| WIOA Eligibility Determination & Registration  **Enter date here \_\_\_\_\_\_\_\_\_** |  |  |
| Release of Information/Receipt of Grievance |  |  |
| Center & Computer Use Agreement |  |  |
| **Placement Information Section** | **YES** | **NO** |
| Employment Verification Document (G01, Offer Letter, etc.) |  |  |
| Obtained Employment Form |  |  |
| DLLR Release of Employment Information |  |  |
| **Case Note/Follow-Up** | **YES** | **NO** |
| Case notes (in contact date order newest to oldest) |  |  |
| Customer Correspondence/Emails |  |  |

\_\_\_\_ I verified all documents and dates on this form have been entered into MWE.

Signature of Case Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_