

Trade Adjustment Assistance Navigator Checklist

Use this Navigator Checklist as a guide to file a quality petition for Trade Adjustment Assistance (TAA). The TAA Manual follows the same steps as this checklist so you can reference the corresponding sections for explanations and resources to accomplish each task.

Disclaimer: For petitions filed on or after July 1, 2021, certification criteria has changed. Service sector petitions and ITC Determinations are no longer direct paths to certification. Please review <https://www.dol.gov/agencies/eta/tradeact> for more information.

Steps to File a Quality Petition	
<input type="checkbox"/>	Gather information from leads and referrals: Speak with local workforce partners and gather data from local resources.
<input type="checkbox"/>	Research for trade impact: Use previous petition data, WARNs, and online resources.
<input type="checkbox"/>	Speak with Workers to gather information on the company, worker group, and trade impact (Refer to questions on page 7 the in manual).
<input type="checkbox"/>	Contact company official(s); Remember that you will need two company contacts for the petition.
<input type="checkbox"/>	Research evidence of trade impact specific to the article/service provided by the worker group. For an article petition, look at import data specific to the NAICS or HTS code of the article produced.
All of the information that you have obtained will now be used to complete each section of the TAA Petition (Online petition filing is preferred). To complete the form:	
<input type="checkbox"/>	Petitioner needs to complete their demographic information and sign.
<input type="checkbox"/>	Provide the information for the corporate headquarters of the firm employing the trade affected workers.
<input type="checkbox"/>	Provide information about the worker group: Layoff date, number of workers, location, and title/division.
<input type="checkbox"/>	Provide a statement on the trade effects of separations: <u>For an article or service petition</u> , write a thorough statement utilizing the information you have obtained through your research. <u>For an ITC petition</u> , include the ITC investigation number, description of items causing import injury and the date is published in the <i>Federal Register</i> .
<input type="checkbox"/>	Attach additional documents to support your research.
<input type="checkbox"/>	Provide complete contact information for two company officials with at least one official who is familiar with the operations of the company/firm.
<input type="checkbox"/>	Submit TAA Petition (online preferred or by email) and save confirmation email.
<input type="checkbox"/>	Reply to the DOL Investigator once they reach out to you regarding your petition.
<input type="checkbox"/>	Send the investigator any additional pertinent information or documents, even after you have submitted the petition.