**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.
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| **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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