

## TWIST TAA Desk Aid

### HOW TO ACCESS TAA ELIGIBILITY INFORMATION

#### **TAA Program Detail: *Eligibility Criteria* Tab in TWIST**

- *Petition*: Name of Trade-certified company and corresponding petition number
- *Certified Date*: Date the petition for Trade benefits was certified by the U.S. Department of Labor
- *BT-1 Date*: Date Texas Workforce Commission (TWC) Trade Adjustment Assistance (TAA) staff mailed letter of potential eligibility to customer

To be eligible for Trade benefits, an individual must have *Yes* for all of the following five criterion:

1. *Separation Date*
2. *Separation Reason*
3. *Job Description*
4. *Job Location*
5. *Subdivision/Department*
  - *Waiver/In Training Deadline Date*: Date a Trade-certified worker must be either enrolled in training or have secured a waiver of the training requirement to maintain Trade Readjustment Allowances (TRA) eligibility.
  - *Job Search Allowances Application Deadline Date*: This date is the 365th day from the worker's petition certification date or separation date, whichever is later. Application form ETA-861 is submitted to TWC's TAA office for a determination.
  - *Job Relocation Allowances Application Deadline Date*: This date is the 425th day from the worker's petition certification date or separation date, whichever is later. Application form ETA-860 is submitted to TWC's TAA office for a determination.

*Note*: Trade-eligible workers who have participated in training services must submit their application for either job search allowance or relocation allowance no later than 182 days after training completion, depending on the petition number and its provisions.

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### HOW TO ACCESS TAA PETITION INFORMATION

#### To Access TAA Petition Information in TWIST:

1. Select the *Group Actions* icon.
2. Click the *TAA* menu selection.
3. Enter the *Petition Number*—enter prefix *T00* in the *Search* field or company name in the *Petition Search* field, and click *Search*.
  - If you use the petition number, the *Petition Detail* displays.
  - If you use the company name, you get a list of all the petitions for that company. Open the *Petition Detail* by double-clicking the petition of your choice.

*Note:* The petition is certified if there is a date in the *Certified* field. The petition is Alternative Trade Adjustment Assistance/Reemployment Trade Adjustment Assistance—certified if the *ATAA/RTAA* box is checked.

4. Click the *Employer List* tab to display the primary company name and any other company names covered by the petition.
5. Click the *Layoff List* tab to see a list of all employees the employer identified as having left the company since the petition impact date and their trade-affected status.
  - Double-clicking the employee name displays the employee's demographics.
  - All employees on the layoff list have a TWIST *TAA Program Detail* record.

*Note:* Workforce Solutions Office staff cannot make any changes to the petition information in TWIST.

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### TAA WAIVERS AND DENIALS

#### **TWIST TAA Waiver Tab: Waiver Section** (top window)

1. Right click in the *Waiver* section window and select *add*.
2. Enter the *Waiver Start Date*.

*Note:* The waiver start date is the same day the customer is issued the waiver (must be prior to the *Waiver/In Training Deadline Date* on the *Eligibility Criteria* tab). Backdating waivers is not permissible. Under limited circumstances, e.g., staff malfeasance (thorough justification must be provided), backdating a waiver is appropriate and must be coordinated through TWC's TAA office.

3. Enter the *Waiver End Date* (always a Saturday) tailored to customer's situation; it must not extend beyond the worker's eligibility for Basic TRA.
4. Enter the *State* (always Texas).

*Note:* All out-of-state waivers must be sent to TWC's TAA office.

#### **TWIST TAA Waiver Tab: Waiver Status Section** (bottom window)

1. Right click in the *Waiver Status* section window and select *add*.

*Note:* The displayed *Waiver Status* is linked to the highlighted waiver in the *Waiver* section. Ensure you highlight the correct waiver you want to enter or change *Waiver Status* information.

2. Select the *Waiver Status Reason* from the dropdown list. (Entry required whether waiver is approved or revoked.)

*Note:* Staff can revoke a waiver only if training is feasible and enrollment is scheduled; all other revocation reasons will be entered by TWC's TAA office. If another waiver revocation reason applies, submit the waiver to TWC's TAA office for a formal determination. When a customer is entering training, revoke the waiver and change the *Waiver End Date* in the *Waiver* section to the day before the *Enrolled in Training Date*.

**TWIST TAA Denial Tab:** Provides the status of a denial request. Only TWC's TAA office enters denial information. Each selection in the *Denial* section has a corresponding *Denial Status*.

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### TAA SERVICE TRACKING

#### Tracking Service Information in TWIST

Upon the start of TAA-approved training, enter:

<u>Service Category</u>	<u>Service</u>
• 5–Education:	2–ABE, 54–GED, 44–ESL
• 4–Training Services:	1–Occupational/Vocational Training

using fund code:

- 121–*Trade Adjustment Act*: meets all approval criteria and training is funded entirely with Trade funds; or
- 136–*TAA/Other*: meets all approval criteria and is funded by a program other than Trade. This service entry counts toward the allowable training weeks per petition number.

***Important:*** Choose the correct petition number when entering a fund detail line; some customers may have multiple petition program details.

#### **Enter a TAA service into TWIST as a separate entry from other program services/funding streams.**

- *Planned Training \$*: This field reflects the entire cost of the training program from start to finish. Training cost must include estimated tuition, fees, books, tools, and any other required training-related expenses.
- *O\*NET*: occupational code for customer’s training goal.
- *CIP*: instructional program code.
- *FICE*: federally assigned code that identifies schools.

*Note:* 99999–*Other* is not allowed in the *O\*NET* and *CIP* fields.

- 68–*Employability Development Plan*: Enter for the following situations:
  - Upon Reemployment and Training Plan (REP) approval, which must be within 30 days of the beginning training start date;
  - Whenever an amendment occurs for cost, time frame extension, change of occupation/program/provider, and change of course load; and
  - If a break in training creates a new period of participation of 90 days or more.
- 21–*Case Management* service: Use when there is an active waiver; it is used to document the 30-day requirement. There is local flexibility for this service; it may be used for functions other than the waiver contact requirement.

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- 190–*Prerequisite Training*: Use if coursework is required by the training provider prior to a worker’s acceptance into a training program.
- 11–*Planned Gap in Service*: Use to reflect a break in training of more than 30 school days. Customer will not receive TRA benefits during a planned gap in service.

*Note*: For a complete list of Trade services, see:

[http://www.twc.state.tx.us/development/plan/system\\_services\\_matrix\\_locked.xls](http://www.twc.state.tx.us/development/plan/system_services_matrix_locked.xls)

### **Enter the following sub funds in the corresponding training service:**

- 49–*Part-Time Training*: Use when a trade-affected customer is enrolled in part-time training. Customer will not receive TRA if in part-time training.
- 50–*Integrated Remedial*: Use when a provider concurrently teaches remediation (e.g., basic reading, writing, and mathematical skills (ABE); ESL; GED; and zero-level courses) and occupational vocational training.
- 48–*Distance Learning*: Use when TAA-approved training is entirely distance learning (i.e., online training).

*Note*: Multiple sub fund lines may be open, if applicable.

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### TAA INTAKE COMMON AND PROGRAM DETAIL

#### Intake Common/Specialized Services in TWIST

In order to save a TAA *Application Date* in TWIST *Program Detail*, staff must complete the tabs below to prevent TWIST *errors in save*.

- *Identity Tab:*
  - *city code*
  - *county code*
  - *birthdate*
  
- *Characteristics Tab:*
  - *Selective Service:* Selective Service status is not required for TAA, but if coenrolled in Workforce Investment Act services, this information is necessary.
  - *Citizenship:* If the worker is a permanent resident, the INS expiration date must be entered.
  - *Hispanic/Latino:* If *Yes*, *Race* must also be checked.
  - *Gender*
  - *Limited English*
  - *Offender*
  
- *Education Tab:*
  - *Highest Grade Completed:* The worker's highest level of education at the time of Trade eligibility. Grade "0" is not allowed.
  
- *Military Service Tab:*
  - *Yes:* Answer corresponding questions.
  - *No:* Operation Iraqi Freedom question still must be answered.
  
- *Public Assistance Tab:* If *Yes* for either benefit, enter the last day received:
  - *SSI*
  - *SSDI*
  
- *Employment Status Tab:*
  - *Unemployment Comp Status*
  
- *Disability/Medical Tab:*
  - *Disabled*
  - *Disability Barrier*
  - *Substance Abuse*

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- *Program Detail*: The following tabs, and all fields within these tabs, must be completed:
  - *Program Summary*
  - *Characteristics*
  - *Education*
  - *Military*
  - *Public Assistance*
  - *Employment Status*
  - *Disability/Medical*

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### TAA TWIST COUNSELOR NOTES

The following suggested narrative entries are provided to assist with the processing of TAA/TRA benefits.

- *Initial Assessment:*
  - EOS-1 (Explanation of Services)
  - First three sections of the REP
  - Customer's previous skills and abilities
  - Labor market information (LMI)
  - Occupational goal of interest
  - Discussion of six approval criteria and three additional considerations
  - Waiver/In Training deadline specified and discussed
  - Maximum time frame of petition
  - Discussion of full time/part time (FT/PT) training status and impact on TRA
  
- *Waiver Issuance:*
  - Waiver reason
  - Start and end dates of waiver
  - 30-day contact requirement
  - Copy given to customer
  
- *Waiver Review:*
  - 30-day contact requirement
  - Waiver reason still applies
  
- *Waiver Denial:*
  - Justification for waiver denial recommendation
  
- *Waiver Revocation:*
  - Justification for waiver revocation recommendation
  
- *Waiver Modification:*
  - Waiver modification reason
  - New waiver reason
  
- *Lack of 30-day waiver contact:*
  - Document, if applicable
  - Not grounds for waiver revocation as this is a TRA issue
  
- *Training Approval:*
  - Institution name, time frame, occupational goal, and cost
  - Training meets approval criteria
  - Estimated number of weeks for prerequisite/remedial courses, if applicable



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- TRA may not last entire length of training
- Benchmark requirements
- Copy of REP given to customer
- *Current Training Status*: Required at the beginning of each semester or training module, and at any time courses are dropped or participation otherwise changes:
  - Document full time or part time
  - Notate semester, courses, start date and end date, total number of credit or clock hours, and total number of weeks

*Note*: Enter new information in *Counselor Notes* if customer's FT/PT status changes due to dropping/withdrawing from courses.
- *REP Amendments*: Required when any of the below elements are modified. Include in *Counselor Notes*:
  - Original occupation/course name/program name
  - Original institution
  - Original training time frame
  - Original cost
  - Amended occupation/course name/program name
  - Amended institution
  - Original training time frame
  - Amended cost
  - Justification of amendment
- *Dropped out of training*:
  - Document reason
- *Program Continuing*:
  - Document reason
  - Case will go inactive
  - Estimated date of return
- *Entered Employment*:
  - Employment information
  - Credential information, if applicable
  - Employment information in *Performance Outcomes*
- *Completed Training*:
  - Completion date
  - Credential information in *Performance Outcomes* and notes

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- *Remedial & Prerequisite Classes:*
  - List courses
  - Dates and title of semester(s) taken
  - Number of weeks
  - Number of credit hours
- *Job Search/Relocation Allowance:*
  - Date customer requested information
  - Referred to TWC's TAA office to file request and for determination of benefit(s)
- *Benchmark Review:* Must be accomplished no less often than every 60 days during training.
  - Indicate whether the customer is meeting the two benchmark requirements:
    - maintaining satisfactory academic standing; and
    - completing training in the required time frame identified on the REP
  - List courses and grades (if available)
  - Form of benchmark training provider documentation
  - Status: FT/PT
  - Date of next benchmark review
- *Benchmark Warning:*
  - Document semester
  - List courses and grades
  - Status: FT/PT
  - Note which benchmark(s) not met
  - REP must be amended if a consecutive benchmark warning is issued
  - Determine if training still meets the approval criteria
- *Justification of Above Reasonable Cost Standard*  
(see WD Letter 06-10):
  - Occupation
  - Institution
  - Start and end dates
  - Lowest, most reasonable cost for the occupation
  - Extenuating circumstances warranting consideration
  - Local office recommendation
- *Recommendation of Denial of Training:*
  - Occupation
  - Institution
  - Start and end dates
  - List which of the approval criteria or three additional criteria the plan/REP does not meet
  - Brief justification of denial recommendation
  - Submitting to TWC's TAA office for determination

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### TAA PROGRAM DETAIL DEFINITIONS

#### **Program Summary Tab:**

- **BT-1 Date**—Date TWC TAA staff mailed a letter of potential eligibility to the customer
- **Interest in Training Date**—Workforce Solutions Office staff enters the date the customer made a bona fide application for training or completed the Explanation of Services form (EOS-1), whichever is earliest.
- **Interest in Training O\*NET**—Enter the code of the occupation in which the customer expressed an interest. (This is not a binding final selection.)
- **Tenure**—Number of months customer was employed with the Trade-certified employer
- **Average Weekly Wage**—Calculated on the first day a customer requests TAA services. Defined as the highest quarter out of the last five from the trade-affected employer divided by 13—exclude any severance packages. (Wages are located under the TWIST *Performance Data* menu selection and *Wage Detail* tab.)

*Note:* Document the source or the quarter used to calculate in TWIST  
*Counselor Notes.*

- **File for TRA**—Indicates the customer applied for TRA benefits
- **Application Date**—Date on which a Trade-certified worker first requests a TAA service

*Note:* Once the application date is entered, only TWC TAA staff can change it.

- **Enrolled in Training Date**—Date training is TAA-approved, which is within 30 days of initial planned start date. Additionally, the approval of TAA training must be reflected by service 68—*Employability Development Plan* and entered within 30 days prior to enrollment.
- **Initial Planned Start Date**—Date the customer actually begins attending training
- **Remedial Weeks in Training**—Number of weeks of the training program that contain any ESL, ABE, GED, zero-level courses, or prerequisite training. (Remedial weeks can be concurrent with occupational training.)
- **Program Detail Exit Reasons:**
  - 93—*Completed TAA Approved Training:* Use if customer has finished training.
  - 77—*Entered Employment:* Use if customer has secured employment.
  - 98—*Quit No Specific Reason:* Use if customer stopped attending training and offered no justifiable reason.

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- 78–*Other*: Use if customer dropped out for a justifiable reason, which must be documented in TWIST *Counselor Notes*.
- 103–*Training Can No Longer Be Completed Within 104 Weeks*: May use for 130- and 156-week petitions. This closure reason is used upon a determination from TWC’s TAA office indicating termination because training may not be completed within the required time frame.
- 105–*No Longer TAA Approvable*: Use after a determination from TWC’s TAA office indicating termination because the REP no longer meets the approval criteria.
- 26–*See Exclusion Tab*: Use if the customer is no longer participating and an exclusion reason applies. Must also complete the *Exclusion* tab under *Performance Data*. Exclusion reasons for TAA are: 1) institutionalization; 2) health/medical; 3) deceased; 4) family care; 5) incarceration; and 6) reservists called to active duty.