

Trade Adjustment Assistance

Reauthorization Act of 2015

Extension Act of 2011

A Quick Guide for
Petitions TA-W # 80,000 +

++Training ++

Amount of TAA funds that can be used for Training

- \$10,000 for training programs lasting up to 52 weeks
- \$20,000 for training programs lasting over 52 weeks

Length of Training

- Up to 130 instructional weeks

Trade Readjustment Allowances

- Must attend full-time training
- Must be on a waiver from training or **ENROLLED** in TAA approved training by the later of 26 weeks after the date of petition certification; or 26 weeks after the customer's most recent total separation

RTAA and Training

- Customer can participate in full-time or part-time Trade Act approved training.
- If enrolled in Trade Act approved training, part-time employment must be at least 20 hrs/wk
- OJT followed by RTAA is approvable as long as RTAA eligibility requirements are met

The Six Criteria

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1. There is no suitable employment
2. The customer would benefit from appropriate training
3. There is a reasonable expectation of employment as a result of training
4. Training is reasonably available to the customer
5. The customer is qualified to undertake and complete training
6. Training is suitable for the customer and available at a reasonable cost

Other approvable training:

- Part-time training
- Apprenticeship, OJT & Distance learning
- Pre-layoff training - If determined in "Threatened Status" by New York State Department of Labor
- Blended programs (classroom & OJT)

Waivers & TRA

- The start date of the initial waiver must be on or before the Training Enrollment Deadline (TED) date
- Customer must have entitlement to Basic TRA in order to be issued a waiver
- The end date of any waiver cannot exceed the customer's entitlement to Basic TRA

Duration

- The length of the initial waiver is no more than 90 days, ending on a Sunday
- The start date for subsequent waivers from training will be Monday
- Subsequent waivers can be issued for no more than 30 days ending on a Sunday

Job Search Requirement

- Customer on a waiver must be ready, willing and able to work and provide evidence of a positive job search
- Customer who is on a waiver must provide evidence of at least three job search contacts per week on their TA-952.1

Certifying for TRA While on a Waiver

- Job search efforts must be documents on the TA-952.1 (Request for Payment and Record of Job Search)
- This document is faxed to UI SPECIAL PROGRAMS - TRA UNIT, 518-457-9492 for the purpose of weekly certification and job search effort

Waivers Available for:



Enrollment Unavailable – Training does not start within 30 days of approval

Health – Customer is unable to participate in training due to health, but can work

Training Not Available – No suitable training is available for the customer at a reasonable cost or no training funds are available

Waiver Review

- Waiver review meetings must be held with the customer no later than 30 day intervals
- Job search efforts must be reviewed
- Three job searches a week are required

Basic TRA

- 52 weeks of Basic TRA minus any weeks of regular U.I. benefits. In most cases, customer will collect 26 weeks of regular U.I. plus 26 weeks of Basic TRA.
- Customers must exhaust any rights to U.I. prior to receiving Basic TRA
- May claim Basic TRA while in full-time TRADE ACT approved training IF **ENROLLED** in training or on a waiver from training by T.E.D.
- Must be approved for training in order to be granted the Enrollment Unavailable waiver
- After exhausting UI, customer will receive paper certification forms from UI
- Can collect the balance of Basic TRA after training ends, if customer meets specific eligibility criteria

T.E.D.
Training Enrollment
Deadline for TRA
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Deadline is 26 weeks after
petition certification, or 26
weeks after customer's
layoff, whichever is later

SPECIAL PROGRAMS -TRA UNIT

- Can collect the balance of Basic TRA after training ends, if customer meets specific eligibility criteria

ENROLLED

Has 3 Components:

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1 – Accepted by the provider

2 – Approved by TAA Central Office

3 – Training to begin within 30 days

++ Trade Readjustment **Allowances (TRA) ++**

Additional TRA

- Up to 65 Weeks of Additional TRA Benefits while attending full time TRADE ACT approved training
- Collectible within 78 calendar weeks
- Additional TRA ends when training ends

Completion TRA

- Up to 13 Weeks of Completion TRA benefits within a 20 week period
- Established benchmarks must be met.
 - Maintaining satisfactory academic standing and
 - On schedule to complete training within the timeframe identified in the approved training plan (i.e., Must complete training within the authorized period)

Work/Earnings

- Customer must report wages on TRA forms
- May work and collect TRA while attending full- time TRADE ACT approved training, if customer meets specific eligibility criteria
- Customer's TRA payment amount will be reduced if they worked and earned more than the weekly TRA payment amount in a given week, and will not be reduced if the weekly earning is less than the weekly TRA payment amount and they are in full-time training

TRA & RTAA

- Can go from TRA to RTAA
- Cannot go from RTAA to TRA if TRA has been collected

++ (RTAA) Re-employment Trade Adjustment Assistance

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General Info

- Provides a wage supplement for up to two years, for those who are aged 50 or over and are re-employed at annual wages of \$50,000 or less
- Maximum benefit: \$10,000 (benefits end when \$10,000 or 2 years* is reached; whichever comes first)
- Does not require re-employment within first 26 weeks of separation. (previous version of the program did require the customer to have found the new job within first 26 weeks)
- Requires full-time employment (or 2 part-time jobs)
- Part-time employment approvable only if the customer is also enrolled in full-time TRADE ACT- approved training
- OJT followed by RTAA is approvable as long as the RTAA eligibility requirements are met
- Need not be 50 years old at time of reemployment; must reach age 50 during eligibility period. Participation may begin after age 50.
- Cannot return to employment with Trade affected employer

Employment & Training

- Customer can participate in full-time or part-time TRADE ACT- approved training, while employed.
 - Must be reemployed full-time if not enrolled in training
- OR
- Reemployed at least 20 hours per week and enrolled in training

Eligibility Period

- If the customer has **not** received TRA:
 - *2 years from the date the customer has exhausted UI or 2 years from the date of reemployment, whichever is **earlier**
- If the customer has received TRA:
 - *2 years from the date of reemployment minus the number of weeks of TRA received

RTAA & TRA

- Can go from TRA to RTAA
- Cannot go from RTAA to TRA if TRA has been collected

++ Travel & Subsistence Allowances ++

General

Available to those customers who:

- Have to travel outside of the normal “commuting area” for training,
- Temporarily reside outside of the “commuting area” for training,
- Relocate outside of the “commuting area” for new employment – see Relocation Allowance Section
- Travel outside of the “commuting area” while searching for work – see Job Search Allowance Section

Travel Allowance (Costs to Go To & From Training)

Requirements

- Training must be outside the customer’s “commuting area”

Amounts

- Customer is reimbursed 100% the lesser of:
 - A per mileage rate based on Federal GSA Rates:
<http://www.gsa.gov/portal/content/100715>
- OR
- Reasonably available public transportation
- Only travel to and from classes/training will be reimbursed

Subsistence Allowance (Lodging & Meals While in Training)

Requirements

- Training must be outside the customer’s “commuting area”
- Supplemental assistance to pay costs of lodging and meals while residing in a secondary residence during approved training

Amounts

- Customer will be reimbursed the lesser of:
 - 100 percent of the actual cost of the individual for lodging and meals while in travel status
- OR
- 50 percent of the prevailing per diem allowance rate authorized under the Federal Travel Regulations found at:
<http://www.gsa.gov/portal/category/21287>

***What does
“commuting area”
mean?***

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***Distance within 1 hour
one way by personal
vehicle OR 1.5 hours
one way by public
transportation***

++ Job Search Allowances ++

Job Search Allowance - Requirements

- Job search allowance must be requested prior to interview
- Interview must be verifiable with contact information
- Job search effort must be completed within 30 days

Job Search Allowance - Amount

- 90% of the allowable cost, up to a maximum of \$1,250
- Covered items include transportation (most cost effective mode of travel reasonably available or cost per mile at Federal mileage rate: <http://www.gsa.gov/portal/conent/100715>) and subsistence
- Customer will be reimbursed 90% of the lesser of:
 - The actual cost to the individual for lodging and meals while in travel status; or
 - 50 percent of the prevailing per diem allowance rate authorized under the Federal Travel Regulations found at: <http://www.gsa.gov/portal/category/21287>

DEADLINE to file application:

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***365 days after company certification or 365 days after customer's layoff,
whichever is later***

OR

182 days after the customer has completed Trade Act approved training

++ Relocation Allowance ++

Relocation Allowance - Amounts

- 90% of the reasonable and necessary cost to relocate the customer and family and household effects.
- No more than 18,000 lbs (weight of household effects)
- Customer will be reimbursed 90% of the lesser of
 - The actual cost of the individual for lodging and meals while in travel status; or
 - 50 percent of the prevailing per diem allowance rate authorized under the Federal Travel Regulations found at: <http://www.gsa.gov/portal/category/21287>
- Lump sum payment of 3 times the customer's average weekly wage, up to a maximum of \$1,250

Relocation Allowance - Requirements

- Relocation allowance application must be received by the local, office prior to customer's relocation
- Have no reasonable expectation of securing suitable employment within a reasonable "commuting area"
- Relocate outside the normal "commuting area", but within the United States
- Provide written verification of suitable employment obtained from the new employer prior to relocation.

DEADLINE to file application:



***425 days after company certification or 425 days after customer's layoff,
whichever is later***

OR

182 days after the customer has completed Trade Act approved training

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<http://www.irs.gov/HCTC> or

1-877-777-4778

++ Health Coverage Tax Credit (HCTC) ++

General

- A refundable personal income tax credit covering 72.5 percent of an eligible participant's monthly qualifying health insurance premium
- The tax credit is available for tax year 2015 as an end-of-the-year tax credit with taxpayers' 2015 income tax return
- The tax credit is available for tax year 2014. Taxpayers must file an amended 2014 income tax return
- Beginning in tax year 2016, taxpayers may elect to file for HCTC with an end-of-the-year tax credit with their 2016 return, or by enrolling in the advance credit option beginning in June 2016. The advance credit option will provide the 72.5 percent of the payable premium for a qualified health insurance plan as a monthly credit. This amount will be **forwarded by the IRS to the qualified health insurance plan** on behalf of the individual receiving advance credit. The taxpayer will be responsible for the payment of the 27.5 percent of the payable premium on a monthly basis. Until the advance tax credit option is implemented in June 2016, taxpayers must continue to pay 100% of the payable premium for qualified health insurance.

HCTC - Requirements

- Must be Trade Act eligible AND collecting income support under the TRA/ATAA/RTAA Programs
 - For tax years 2015 and 2014: must request HCTC Eligibility Certification (proof of eligibility) from UI SPECIAL PROGRAMS -TRA UNIT
- Must have a qualifying health insurance plan (COBRA, State-based health insurance program, Spousal Coverage...)
 - Coverage under the State-operated health plan receiving federal financial participation are non-qualifying

++ Scenarios

Benefits While Working and/or in Training ++

Working...	+	Training...	=	Potentially Eligible for Income Support ...	Eligible for Training Costs?
Full Time		Not In Training		RTAA	No
Full Time		Part Time		RTAA	Only if not "suitably employed"
Full Time		Full Time		RTAA	Only if not "suitably employed"
Not Working		Full Time		TRA	Yes
Part Time		Part Time		NONE	Yes
Part Time (< 20 hours)		Full Time		TRA	Yes
Part time (>= 20 hours)		Full Time		TRA or RTAA	Only if not "suitably employed"