

**DIVISION OF EMPLOYMENT & REHABILITATION SERVICES**  
**Trade Adjustment Assistance (TAA) Program**  
**and**  
**Workforce Innovation and Opportunity Act (WIOA) Title I-B Program**  
**Policy Broadcast Revised**  
**PB 18-014R**  
**TAA and WIOA Title I-B Co-Enrollments**  
***Effective Immediately***

This Policy Broadcast (PB) is to inform all Trade Adjustment Assistance (TAA) program staff, WIOA Title I-B program staff, and interested parties of policy and procedures regarding the **co-enrollment of TAA program participants** with the WIOA Title I-B **Dislocated Worker program**.

***IMPORTANT NOTE:***

*WorkforceGPS held a webinar on Wednesday, June 13, 2018 titled “Trade Adjustment Assistance (TAA) and Title I Dislocated Worker Co-Enrollment”; however, Region VI was inadvertently omitted from the notification.*

*The webinar video recording and materials are located at <https://www.workforcegps.org/events/2018/05/30/12/53/Trade-Adjustment-Assistance-TAA-and-Title-I-Dislocated-Worker-DW-Co-Enrollment>.*

*TAA and WIOA Title I-B program staff are **highly encouraged** to review the recording and materials (PowerPoint presentation, transcript, etc.) that relate to the co-enrollment requirement.*

This broadcast describes the following:

- A. Co-enrollment of TAA participants with the WIOA Title I-B Dislocated Worker (DW) program;
- B. Coordination of activities; and
- C. Avoiding duplication of assistance.

**CO-ENROLLMENT REQUIREMENTS**

TAA staff **must refer** participants for co-enrollment with the WIOA Title I-B DW program as outlined in the [TAA Program Policy Manual](#), **Section 105 – EMPLOYMENT AND CASE MANAGEMENT SERVICES**. The [WIOA Policy and Procedure Manual](#), **Section 100 – Adult and Dislocated Worker Programs**, outlines the co-enrollment requirements

(Section 105) and the other programs with which co-enrollment may occur (Section 106.D).

- A. Co-enrollment allows for additional resources toward training and financial support, enhanced service delivery, and increased customer support which results in greater participant outcomes.
- B. Local Workforce Development Areas (LWDA), under the WIOA Title I-B program located in ARIZONA@WORK Job Centers, may designate staff to jointly case-manage participants who are enrolled in both the TAA and WIOA Title I-B DW programs.
- C. WIOA Title I-B staff may co-enroll the TAA participant in the WIOA Title I-B DW program when the *Referral for Services* (TAA-1025A or TAA-1025AS) forms are received from the TAA Counselors and eligibility is determined.
- D. It is recommended that TAA and WIOA Title I-B staff review the AJC Service Dictionary to become familiar with each program's services for coordination and avoiding duplication.

**Note:** The AJC Service Dictionary is located on the DES website at <https://des.az.gov/services/employment/workforce-innovation-and-opportunity-act/policies-and-resources>.

### **REFERRAL FOR CO-ENROLLMENT**

TAA Counselors **must** refer participants for co-enrollment with the WIOA Title I-B DW program by completing the *Referral for Services* (TAA-1025A or TAA-1025AS) form.

- A. **TAA** – Within **three business days** after the initial interview, the TAA Counselor **must**:
  - 1. Contact and notify the appropriate WIOA Title I-B supervisor or designee that the TAA participant is being referred for co-enrollment;
  - 2. Complete the *Referral for Services* (TAA-1025A or TAA-1025AS) form to refer the TAA participant to the appropriate ARIZONA@WORK Job Center location.
  - 3. Upload the form in AJC under the **Case Details – Universal Information** screen:
    - a. Select the link to “Add New Document”;

- b. **Next to Document Item, click on the drop-down arrow and select “Referral for Services” from the options;**
  - c. **Under “Select Documentation Item Type”, select “Universal” and click Continue;**
  - d. **Under “Type of Document”, select “Supporting” and click Continue;**
  - e. **Under “Data Elements to be verified”, check the box for “Intake/Employment Plan” and click Continue;**
  - f. Upload the form and enter a “File Description” as appropriate;
  - g. Document the Client Notes in the **Case Details – Universal Information** screen with all actions taken including:
    - i. The date the action was taken;
    - ii. Name of the WIOA Title I-B supervisor or designee contacted;
    - iii. Services requested and/or needed; and
  - h. Notify the WIOA Title I-B supervisor or designee when the form has been uploaded.
- E. **WIOA Title I-B** – Upon receipt of the notification from the TAA Counselor that the *Referral for Services* (TAA-1025A or TAA-1025AS) form was uploaded in AJC, the designed WIOA Title I-B staff will enroll the TAA participant in the WIOA Title I-B DW program when program eligibility criteria are met and schedule the TAA participant for WIOA Title I-B services.
- 1. The WIOA Title I-B staff will print the *Referral for Services* (TAA-1025A or TAA-1025AS) form;
  - 2. Complete the appropriate information on the bottom section of the form;
  - 3. Upload the completed form;
  - 4. Document the Client Notes in the **Case Details – Universal Information** screen with all actions taken; and

5. Notify the TAA Counselor that the form has been completed, uploaded, and when the co-enrollment has begun.
- F. **The TAA Counselor and WIOA Title I-B staff are encouraged to:**
1. Communicate frequently;
  2. Coordinate services the TAA participant is receiving to maximize all resources available via the ARIZONA@WORK Job Center; and
  3. Eliminate barriers to service delivery.
- G. **TAA** – Counselors must use the *Referral for Services* (TAA-1025A or TAA-1025AS) form **throughout the case management process, as appropriate**, to refer participants to other community and/or service providers for assistance as outlined in the *Trade Adjustment Assistance User Guide*, Section **101.05 – Referral for Services**.

***This information will be included in the following revisions:***

- ***TAA Policy Manual and the TAA Program User Guide – All requests for clarification should be sent by your policy designee via email to [DERSTAAPolicy@azdes.gov](mailto:DERSTAAPolicy@azdes.gov).***
- ***WIOA Title I-B Policy and Procedure Manual – All requests for clarification should be sent via e-mail by your policy designee to [WIOAQandA@azdes.gov](mailto:WIOAQandA@azdes.gov).***