

# Trade Adjustment Assistance for Workers

After receiving a complete petition, the Office of Trade Adjustment Assistance (OTAA) assigns the petition a five digit case number in the format of "TA-W-XX,XXX". If you don't already know your petition number, you may identify it by conducting a search using your company name. The petition number, with a few exceptions, corresponds with the law governing the TAA program at the time the TA-W number was assigned, and also indicates whether the benefits that may be available to you are those under the 2011 Law (Trade Act as amended by the TAA Extension Act of 2011), the 2009 Law (Trade Act as amended by the TGAA), or the 2002 Law (Trade Act as amended by the TAARA and in effect before the TGAA; after February 12, 2011 and before October 21, 2011, when the TAA Extension Act went into effect; **and after December 31, 2013 in accordance with the Sunset Provisions of the TAAEA**).

Petitions numbered **TA-W-80,000 to TA-W-80,999**: The 2009 law expired on February 12, 2011, at which time the program reverted to operating under the 2002 Law. Between February 12, 2011 and October 21, 2011, the Department certified and states served workers under the 2002 law. The passage of the 2011 law revived many of the enhancements and increased flexibilities of the 2009 law. It also included a provision allowing workers covered under petitions numbered TA-W-80,000 and above, who were currently participating in the TAA program, and receiving benefits under the 2002 law on or prior to December 20, 2011 to take advantage of the new 2011 law by making a one-time choice (between December 20, 2011 and March 19, 2012) to change which law governs their benefits and services. Thus attention should be paid to identify which law governs benefits and services of workers certified under petitions numbered TA-W-80,000 to TA-W-80,999.

	Petitions <b>TA-W-69,999</b> and below	Petitions <b>TA-W-70,000</b> through <b>TA-W-79,999</b>	Petitions <b>TA-W-81,000</b> through <b>TA-W-84,999</b>	Petitions <b>TA-W-85,000</b> and above
	2002 Law Benefits	2009 Law Benefits	2011 Law Benefits	Reversion 2014*
<p><b>Group Eligibility:</b> Defines the worker group that is eligible to apply for and potentially receive benefits through the TAA program</p>	<p><b>Manufacturing sector workers ONLY</b></p> <p>~~~~~</p> <p>Workers who have lost their jobs because their company's decline in production and/or sales was due to increased imports or the outsourcing of jobs to a country with which the US has a Free Trade Agreement</p>	<p><b>Manufacturing sector workers</b></p> <p><b>Service sector workers</b></p> <p><b>Public sector workers</b></p> <p>ITC workers (those who work for a firm that has been identified by the International Trade Commission as in a domestic industry that has been injured/is a party to a market disruption)</p> <p>~~~~~</p> <p>Workers who have lost their jobs because their company's decline in production and/or sales was due to increased imports or outsourcing to <b>ANY</b> country</p>	<p><b>Manufacturing sector workers</b></p> <p><b>Service sector workers</b></p> <p>ITC workers (those who work for a firm that has been identified by the International Trade Commission as in a domestic industry that has been injured/is a party to a market disruption)</p> <p>~~~~~</p> <p>Workers who have lost their jobs because their company's decline in production and/or sales was due to increased imports or outsourcing to <b>ANY</b> country</p>	<p><b>Manufacturing sector workers ONLY</b></p> <p>~~~~~</p> <p>Workers who have lost their jobs because their company's decline in production and/or sales was due to increased imports or the outsourcing of jobs to a country with which the US has a Free Trade Agreement</p>

<p><b><u>Trade Readjustment Allowances (TRA):</u></b> A wage subsidy available in the form of weekly cash payments to workers who are enrolled in a full-time training course</p>	<p>Up to <b>104 weeks</b> of TRA available to workers enrolled in full-time training <i>OR</i> Up to <b>130 weeks</b> of TRA available to workers enrolled in remedial training</p> <p><b>52 weeks</b> UI/Basic TRA <b>52 weeks</b> Additional TRA <b>26 weeks</b> Remedial TRA</p> <p>Must enroll in training within 8 weeks of certification or 16 weeks of layoff</p>	<p>Up to <b>130 weeks</b> of TRA available to workers enrolled in full-time training <i>OR</i> Up to <b>156 weeks</b> of TRA available to workers enrolled in remedial or prerequisite training</p> <p><b>52 weeks</b> UI/Basic TRA <b>78 weeks</b> Additional TRA <b>26 weeks</b> Remedial TRA</p> <p>Must enroll in training within 26 weeks of either certification or layoff</p>	<p>Up to <b>130 weeks</b> of TRA available to workers enrolled in full-time training, the last 13 of which are only available if needed for completion of a training program and training benchmarks are met</p> <p><b>52 weeks</b> UI/Basic TRA <b>65 weeks</b> Additional TRA <b>13 weeks</b> Completion TRA</p> <p>Must enroll in training within 26 weeks of either certification or layoff</p>	<p><b>Up to 130 weeks of TRA available to workers enrolled in full-time training, the last 13 of which are only available if needed for completion of a training program and training benchmarks are met</b></p> <p><b>52 weeks</b> UI/Basic TRA <b>65 weeks</b> Additional TRA <b>13 weeks</b> Completion TRA</p> <p><b>Must enroll in training within 8 weeks of certification or 16 weeks of layoff</b></p>
<p><b><u>Training Waivers:</u></b> Basic TRA is payable if an individual participates in TAA training <i>OR</i> is under a waiver of the requirement to participate in training. Training may be determined not feasible or appropriate and waived as a requirement for basic TRA eligibility for the following reasons:</p>	<ol style="list-style-type: none"> <li>1. The worker will be recalled to work reasonably soon</li> <li>2. The worker has marketable skills for suitable employment and a reasonable expectation of employment in the foreseeable future</li> <li>3. The worker is within two years of eligibility for a pension or social security</li> <li>4. The worker is unable to participate in or complete training due to a health condition</li> <li>5. No training program is available</li> <li>6. An enrollment date is not immediately available</li> </ol>	<ol style="list-style-type: none"> <li>1. The worker will be recalled to work reasonably soon</li> <li>2. The worker has marketable skills for suitable employment and a reasonable expectation of employment in the foreseeable future</li> <li>3. The worker is within two years of eligibility for a pension or social security</li> <li>4. The worker is unable to participate in or complete training due to a health condition</li> <li>5. No training program is available</li> <li>6. An enrollment date is not immediately available</li> </ol>	<ol style="list-style-type: none"> <li>1. The worker is unable to participate in or complete training due to a health condition</li> <li>2. No training program is available</li> <li>3. An enrollment date is not immediately available</li> </ol>	<ol style="list-style-type: none"> <li><b>1. The worker is unable to participate in or complete training due to a health condition</b></li> <li><b>2. No training program is available</b></li> <li><b>3. An enrollment date is not immediately available</b></li> </ol>

<p><b>Training Funding:</b> Annual funding cap for training funding that goes to the states each year</p> <p><b>Case Management Funding:</b> Funds that are provided to states for case management and employment services</p>	<p style="text-align: center;">\$220 Million</p> <p style="text-align: center;">Cap Applies to Training Funds Only</p> <p style="text-align: center;">~~~~~</p> <p>An additional 15% above the amount provided for training is available for administration. Additional funds are available for job search and relocation allowances. No funds are available for case management and employment services</p>	<p style="text-align: center;">\$575 Million</p> <p style="text-align: center;">Cap Applies to Training Funds Only</p> <p style="text-align: center;">~~~~~</p> <p>An additional 15% above the amount provided for training is available for administration, and case management and employment services. At least 1/3 of these funds must be used for case management and employment services. States also receive \$350,000/year for case management and employment services. Additional funds are available for job search and relocation allowances</p>	<p style="text-align: center;">\$575 Million</p> <p>Cap Applies to training, job search and relocation allowances, case management and employment services, and associated administration.</p> <ul style="list-style-type: none"> <li>* No more than 10% of the amount provided may be spent for administration;</li> <li>* No less than 5% of the amount provided may be spent for case management and employment services.</li> </ul>	<p style="text-align: center;">\$353.5 Million***</p> <p>Cap Applies to training, job search and relocation allowances, case management and employment services, and associated administration.</p> <ul style="list-style-type: none"> <li>* No more than 11.5% of the amount provided may be spent for administration;</li> <li>* No less than 5% of the amount provided may be spent for case management and employment services</li> </ul>
<p><b>Job Search Allowances:</b> A cash allowance provided to workers who cannot find an available job within the commuting area (e.g. 50 miles). Used to cover transportation costs, etc.</p> <p><b>Relocation Allowances:</b> A cash allowance provided to workers who have to accept a job outside of their commuting area and relocate</p>	<p>90% of allowable job search costs, up to a maximum of \$1,250</p> <p style="text-align: center;">~~~~~</p> <p>90% of allowable relocation costs, plus an additional lump sum payment of up to \$1,250</p> <p style="text-align: center;">Entitlement for all workers</p>	<p>100% of allowable job search costs, up to a maximum of \$1,500</p> <p style="text-align: center;">~~~~~</p> <p>100% of allowable relocation costs, plus an additional lump sum payment of up to \$1,500</p> <p style="text-align: center;">Entitlement for all workers</p>	<p>Not more than 90% of allowable job search costs, up to a maximum of \$1,250, available at state discretion</p> <p style="text-align: center;">~~~~~</p> <p>Not more than 90% of allowable relocation costs, plus an additional lump sum payment of up to \$1,250, available at state discretion</p> <p>Legislation allowed states to decide whether to offer job search and relocation as a benefit for workers. May not be an entitlement for all workers in all states</p>	<p style="text-align: center;">90% of allowable job search costs, up to a maximum of \$1,250</p> <p style="text-align: center;">~~~~~</p> <p style="text-align: center;">90% of allowable relocation costs, plus an additional lump sum payment of up to \$1,250</p> <p style="text-align: center;">Entitlement for all workers</p>
<p><b>Health Coverage Tax Credit:**</b> A tax credit offered to TAA participants to help pay for the health insurance premiums of the worker and their family</p>	<p>HCTC Expired on January 1, 2014. Beginning January 1, 2014, every eligible TAA recipient will be responsible for paying the full health coverage premiums without HCTC. Further information is available at <a href="http://www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program">www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program</a></p>	<p>HCTC Expired on January 1, 2014. Beginning January 1, 2014, every eligible TAA recipient will be responsible for paying the full health coverage premiums without HCTC. Further information is available at <a href="http://www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program">www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program</a></p>	<p>HCTC Expired on January 1, 2014. Beginning January 1, 2014, every eligible TAA recipient will be responsible for paying the full health coverage premiums without HCTC. Further information is available at <a href="http://www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program">www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program</a></p>	<p>HCTC Expired on January 1, 2014. Beginning January 1, 2014, every eligible TAA recipient will be responsible for paying the full health coverage premiums without HCTC. Further information is available at <a href="http://www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program">www.irs.gov/Individuals/The-Health-Coverage-Tax-Credit-(HCTC)-Program</a></p>

<u>Alternative Trade Adjustment Assistance/Reemployment Trade Adjustment Assistance:</u>	<u>Alternative Trade Adjustment Assistance</u>	<u>Reemployment Trade Adjustment Assistance</u>	<u>Reemployment Trade Adjustment Assistance</u>	<u>Alternative Trade Adjustment Assistance</u>
A wage subsidy provided to eligible workers over the age of 50 that subsidizes a portion of the wage difference between their new wage and their old wage (up to a specified maximum amount)	Requires a separate group certification  Available to workers earning less than an annual salary of \$50,000  Maximum total benefit of up to \$10,000  Training benefit NOT available	Does not require a separate group certification  Available to workers earning less than an annual salary of \$55,000  Maximum total benefit of up to \$12,000  Training benefit is also available	Does not require a separate group certification  Available to workers earning less than an annual salary of \$50,000  Maximum total benefit of up to \$10,000  Training benefit is also available	Requires a separate group certification  Available to workers earning less than an annual salary of \$50,000  Maximum total benefit of up to \$10,000  Training benefit NOT available

\* Reversion 2014 means the TAA program administered in accordance with the Sunset Provisions of the Amendments to the Trade Act of 1974, Enacted by the Trade Adjustment Assistance Extension Act of 2011 (the TAA program under the 2002 Amendments with 2011 Sunset Provisions).

Note: (Green Highlighted Text) Under Reversion 2014, the following provisions provided under the TAAEA, are retained: 1) the elimination of training waivers based on recall, marketable skills, and retirement; 2) the elimination of the additional 26 weeks of TRA for individuals participating in Prerequisite or Remedial training; and 3) the authority for the Secretary to provide up to 13 weeks of additional TRA for workers who qualify for Completion TRA.

\*\* The 2002 Law benefits included an HCTC of 65%, while the 2009 Law benefits included an HCTC of 80%. However, the TAAEA amended the IRC to provide an HCTC of 72.5% for eligible workers covered by TAA petitions filed and certified under the Trade Act under the 2002 Law, the 2009 Law, or the TAAEA.

\*\*\*Under Reversion 2014, under the Consolidated Appropriations Act, 2014, funds are made available to carry out the provisions of all four sets of benefits and services available to TAA participants. Funding elements of both the 2002 Law and the 2011 Law apply. For more information, consult [TEGL No. 12-13](#).