



To: Indiana's Workforce System

From: Indiana Department of Workforce Development (DWD)

Date: November 29, 2021

Subject: DWD Policy 2021-04
Trade Adjustment Assistance (TAA) Training-Related Expenses

Purpose

The purpose of this policy is to provide guidelines for the TAA program's financial support of required technology, tools, supplies and other required items for TAA training participants. This policy establishes the requirements that participants must meet as well as the procedure for the collection of purchased supplies when a participant voluntarily or is otherwise unsuccessfully exited from TAA-approved training.

References

- 20 CFR 618.610

Content

Federal regulations require TAA to pay for required training related costs for all training participants. Costs of a training program may include, but are not limited to, tuition, books, fees, and other required training-related expenses (e.g., tools, computers and other electronic devices, uniforms). Additionally, TAA funds may be used to pay for required immunizations, certification exam fees, and licenses if required to complete the approved training program or gain employment within the field of study.¹

Required Training-Related Expenses

TAA will pay the full cost of all required training-related expenses, within the following parameters and with appropriate documentation:

- The training plan meets the six criteria of training;
- The training provider has a written itemized list of required items; and
- The cost of the required items is available at a reasonable cost. TAA will not pay for items that are not required to successfully complete the approved training program. As with all TAA training-related costs, TAA will seek the most reasonable cost provider for items that meet the needs of the required program.

¹ 20CFR618.610(f)(2)

Required Technology

For purposes of this policy, required technology refers to any personal computer hardware, laptop, tablet, and/or similar technology. It also includes any software necessary to make the hardware functional and meaningful for the training program.

TAA will pay the full cost of technology requirements, within the following parameters and with appropriate documentation as outlined in the TAA Technology Request² form (SF 53014):

- The training provider has a written minimum technology requirement for all students or one that is specific to the participant's requested program/curriculum; and
- The participant otherwise does not have access to the required technology that meets the training provider minimum requirements; and
- The cost of the required technology is available at a reasonable cost. TAA will not pay for technology that exceeds the training provider's requirements. As with all TAA training-related costs, TAA will seek the most reasonable cost provider for items that meet the needs of the required program.

If the training provider does not have a technology requirement that must be met to attend or successfully complete the specific program, TAA funding may not be authorized for the purchase of technology. The required technology must be necessary for the participant to complete the training program. TAA must also exhaust all other available options before including the costs of the required technology.³ If a training provider has options to lease or rent the required technology, this option must first be explored when available and used if appropriate.

Eligibility

The TAA Unit will review technology requests and will issue all formal determinations in writing at the time of the TAA Training Plan Application approval or TAA Training Plan Modification approval. If approved and when available, the TAA participant may order the required training item from the approved training provider and TAA will authorize payment of the required item to be paid directly to the approved training provider.

If the training provider does not have the required technology available to be purchased directly or through the associated bookstore, TAA must first exhaust all other avenues to provide direct payment for the item through available vendors. When all other avenues are exhausted for TAA to provide direct payment to a vendor, the participant may purchase the required item and submit for reimbursement through the TAA program. TAA student reimbursements will be processed and payments will be direct deposited into the bank account provided on the Direct Deposit form on file with the State of Indiana Auditors office.

TAA will pay for **one** computer, laptop, or similar technology per participant. It is the participant's responsibility to ensure that the technology that is requested and purchased meets the training providers minimum requirements when submitting the TAA Technology Request form for determination to the TAA Unit. All technology equipment purchased through TAA, will include the cost of an equipment warranty when a warranty is available. The participant is responsible for reading and

² The TAA Technology Request Form can be accessed from the Staff Portal.

³ 20CFR618.610(f)(2)(B)

understanding the warranty specifications and contacting the vendor to receive service or repairs. TAA will not pay for technology repairs or replacement.

The cost of required software updates may be covered by TAA if the update is needed to complete the training program. Software updates will be reviewed on a case-by-case basis by the TAA Unit.

All items purchased by TAA are considered property of the DWD's TAA Unit until the participant successfully completes training. However, once a participant successfully completes the TAA approved training program, the participant may keep all tools, supplies, technology, etc. that was purchased as part of the TAA approved training program.

Unsuccessful Training Completion

If a participant does not successfully complete the TAA-approved training program, the participant is required to return the purchased tools, supplies, technology, etc. to the local WorkOne/AJC office TAA case management staff member within 30 days of the last date of compliance with the training plan. Failure to comply with this requirement may result in an overpayment of benefits in the amount of the purchased technology.

TAA case managers will be required to send the returned items to the TAA Unit for inventory and repurposing, as deemed appropriate by the TAA Unit.

Assistive Technology

TAA participants with disabilities must be provided, upon request and at no cost to them, appropriate accommodations, auxiliary aids, and services to participate in TAA funded programs and services. Participants requiring appropriate accommodations must notify the TAA Unit within the TAA Technology Request form or otherwise document the need within the TAA Training Application.

Effective Date

Immediately.

Ending Date

Upon rescission.

Additional Information

Questions regarding the content of this publication should be directed to TAATrainingPlans@dwd.in.gov.