



Users' Guide

ASSET SYSTEMS REPORT

5-15 TAA FINANCIAL PLAN

The **TAA Financial Plan** is located under the Systems Report section of the ASSET Menu. To access the plan, open System Reports by clicking on the (+) sign on the ASSET Menu Tree. Next, click on TAA Financial Plan. The screen returned will look like this.

TAA Financial Statement
Print Report

For: JOHN FLASH
Asset PIN: 41
Financial Statement Date: 11/25/2008

Approximate date Unemployment Insurance (UI) will exhaust:	01/08/2007
Approximate date Basic Trade Readjustment Allowance (TRA) will exhaust:	07/08/2007
Approximate date additional TRA will exhaust:	07/08/2007

Financial resources available:

Spousal or family support:	Yes
Personal resources, savings, etc.:	Yes
Pell Grant, scholarships or other educational financial aid:	Yes
Educational financial aid description:	adfa
Income from employment:	Yes
Income from other financial resources:	Yes
Other financial resources:	dafa
Comments:	No Comments

I understand that should I fail to complete the proposed training without good cause, there is a potential overpayment of training funds and I may be responsible for repayment of those funds.

The data captured on the report comes from specific areas of the TAA Financial tab located on the TAA Program Registration screen in ASSET. The information from this tab in ASSET dynamically creates the TAA Financial Plan.

The TAA Financial Plan can be printed and includes an area for signature and date for both the Participant and Staff. Each should retain a copy of the signed plan for reference.

The TAA Financial Plan is intended to be for the participant, and as such should be updated as needed. In most instances, a TAA Financial Plan should be reviewed with the customer on a regular basis to determine the progress and to add or change information as appropriate. The appearance of the TAA Financial Plan will change each time a change is made and saved in ASSET to any of the areas that are used to create the TAA Financial Plan.

From a monitoring and program operation standpoint, the printed and signed version of the TAA Financial Plan will be the one that is in effect for the customer.

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