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Preliminary Qualification Worksheet Instructions

The Preliminary Qualification Worksheet Form is used to prequalify a firm for the Trade Adjustment Assistance Program (TAAP).

Please let our office analyze your firm's completed worksheet, as there are multiple different options we use when determining TAAP eligibility.

Below are instructions for completing the worksheet:

1. At the top of the form where indicated, insert the most current month that you have financial data available and the form will automatically fill in the appropriate dates.
2. Start with the bottom 2 tables (current year data versus previous year) – if you do not show losses of 5% or more in both sales and employees – fill out upper two tables (calculations are done automatically on bottom of page – interim calculation are done on second tab for current year versus previous year). **Use total net sales numbers from your monthly Profit and Loss statements.**
3. List any exports by month if you generate more than 5% of your total net sales in imports (if under 5% - no need to fill out that column).
4. List any resale items that your company resells by month (if applicable).
5. List any intercompany transactions by month (if applicable).
6. List your monthly employee count. **Use monthly employee data from NYS-45 or NJ-927 summary page (PR clients contact our office).**
See attached NYS-45 & NJ-927 sample

Upon completion of the worksheet, please send a copy to info@tradeadjustment.org.