



INDIVIDUAL TRAINING ACCOUNT (ITA) POLICY

1.0 Purpose. To provide guidance as to how an Individual Training Account (ITA) issued through the Northwest Pennsylvania Workforce Investment Area (NW170), will be administered.

2.0 Requirements.

Program participants should be working with their PA CareerLink® case manager on a regular basis to insure that the Individual Employment Plan (IEP) is fully developed and required progression of services has been met prior to an ITA being issued. Final ITA approval is at the discretion of the Program Operators in the Northwest region. Appeals for disapproved ITA's will be reviewed if submitted in writing to the RCWE Programmatic Policy & Analysis Committee within thirty (30) days.

3.0 Scope.

The Training Provider and the program must be on the regional listing of approved programs. Funds may be used only for those courses required by the program/ certificate/degree.

The ITA must be for an in-demand occupation on the High Priority Occupation List in the local WIA. The Training Provider's program needs to be within a reasonable commuting distance that the customer has agreed to, or in an area where the occupation is in demand and the customer is willing to relocate. Documentation of the customer's willingness and ability to relocate must be provided. Preference must be given to local occupations on the High Priority Occupation List and programs submitted by Northwest Regional Training Providers when making this determination.

4.0 Responsibility.

1. All other forms of Federal, State or Local aid (Title IV Pell, PHEAA, SEOG grants, etc.) will first be used to offset the cost of the ITA. The RCWE will neither duplicate, nor pay in addition to, Title I funds that have been awarded by another WIA. ITA's will not be issued for programs in which the expected aid/grants exceed the anticipated semester/term/program costs, as determined by the job seeking customer and PA CareerLink® staff. Job seeking customer is responsible for repayment of ITA should Title IV aid (or other state/local aid) be received after the disbursement of ITA funds.
2. Customer must present PA CareerLink® staff with verification that they have applied for additional financial assistance.
3. Should the student not complete the program for any reason, the standard refund policy of the provider institution will apply.



4. ITA's will not be issued to any individual in default of a student loan. The customer must have the default status removed prior to the approval of Title I WIA funding.
5. An ITA will not be issued to a participant without a GED, HS Diploma or equivalent.
6. Participants must maintain at least a 2.0 cumulative GPA (on a 4.0 scale) or meet the training institution's minimum requirement if more strict. Academic probation will suspend the ITA until such time that the student is no longer on academic probation.
7. All required pre-employment clearances and/or testing must be successfully documented.
8. All ITA's are limited to funding for one (1) training program. ITA's will not pay for failures and/or course repeats. Should subsequent training be required, prior approval must be received from the counselor *and* the Programmatic Policy & Analysis Committee of the Northwest Pennsylvania Workforce Investment Board.
9. The length of an ITA will be limited to 2-years; however, longer ITA's will be evaluated on a case-by-case basis. ITA's may not be modified in excess of 150% of the advertised length of program.
10. Upon approval of the ITA, a Letter of Commitment will be sent to the Training Provider confirming the student's course/program choice and funding approval. **Program Operator's are under no obligation to approve funding for students who start training prior to ITA approval and issuance of a Letter of Commitment.**
11. The RCWE set an ITA funding cap of \$5,500 per person. This is not a guarantee of \$5,500, but a maximum funding based on the actual costs of the approved training course/program. Funding will only be used for *direct* educational expense, not for the provision of supportive services. No more than \$750 of expenditures may be used for the rental/lease or purchase of required durable goods and supplies (not including textbooks). Required textbooks are to remain paid within the general \$5,500 funding cap. This policy excludes funding for guns, clubs, nightsticks, or mace.
12. For nonresidents of the local WIA, ITA's will not exceed the amount of the ITA of the WIA in which the job seeking customer resides or \$5,500 (whichever is less).
13. **PAYMENT:** Funding will be spread across the entire length of the program by semester/term or other standard billing time frame. All invoicing should be sent directly to the student. It is the responsibility of the student/customer to make necessary arrangements for processing payments. Students are required to present the training facility invoice to their PA CareerLink® staff case manager within 30 days of issuance, or the start of a semester/term. Payment requests presented after this 30 day period will not be honored, unless a letter from the training facility accompanies the invoice explaining the delay. PA CareerLink® staff will then coordinate information/invoicing with their fiscal operation, which will trigger release of funds directly to the Training Provider.



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 Rev. Level: I
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14. **Assessment Before Training:** Individuals seeking an ITA must first successfully complete WorkKeys assessments in the areas of Reading for Information, Applied Mathematics, and Locating Information. In order for the requested training to be paid out of program funds, the scores on the WorkKeys assessments at a minimum must be within one level of the requirement for the occupation for which training is being requested. Participants can utilize the WIN placement test and the WIN courseware until their scores are at or above the level necessary for WorkKeys prior to taking the assessment. However, the WorkKeys scores are used to determine readiness to enter a training program, not the scores in WIN.

Other guidelines may be added by the RCWE that may be necessitated by federal and/or state regulation, regional oversight, or local recommendation.

5.0 History.

Name	Date	Rev. Level	Description of change	Effective Date
Lori Hall	09/02/03	A	New policy	
Jim Triplett	09/07/2005	B	10% rule (item 14)	
Paul Newlin	01/10/2006	C	Item 8 modification	
Paul Newlin	01/09/2007	D	Item 3 modification	
Paul Newlin	06/12/2008	E	Item 14 removal	
Paul Newlin	09/08/2008	F	Committee name change & Scope change	
Deb O’Neil	05/01/2009	G	Update logo, content, EO contact	07/01/2009
Deb O’Neil	12/09/2009	H	Assessment scores-WorkKeys	01/08/2010
Deb O’Neil	12/13/2010	I	Reduction in Cap to \$5,500	01/14/2011

Auxiliary aids and services are available upon request to individuals with disabilities.

Equal Opportunity Employer Program
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