



PIEDMONT REGION

Title:	Individual Training Account Policy	Policy #:	3
Effective Date:	July 1, 2015	Revision Date:	January 17, 2019

References: 20 CFR 683.510; 20 CFR 680.340(f); WIOA Section 3(5); WIOA Section 107(g)(1)(B); WIOA Section 134(c)(3)(B)(ii); WIOA Section 134(c)(3)(G)

Purpose:

This policy is to provide instruction and guidance to service providers concerning the use and administration of WIOA Individual Training Accounts (ITAs). ITAs are used to train eligible individuals for in-demand occupations as identified across the entire State as well as for those specific to the Piedmont Workforce Development Area (PWDA). ITAs are developed following a comprehensive assessment of the individual needs of the customer.

Policy:

Training Service Eligibility:

Under WIOA training services may be made available to employed and unemployed adults and dislocated workers who:

1. A one-stop operator or one-stop partner determines, after an interview, evaluation, or assessment, and career planning, are:
 - Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;
 - In need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment; and
 - Have the skills and qualifications to participate successfully in training services;
2. Selects a program of training services that is directly linked to the employment opportunities in the local area or the planning region, or in another area to which the individuals are willing to commute or relocate;
3. Are unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as State-funded training funds, Trade Adjustment Assistance (TAA), and Federal Pell Grants established under title IV of the Higher Education Act of 1965, or require WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants; and
4. If training services are provided through the adult funding stream, are determined eligible in accordance with the State and local priority system in effect for adults under WIOA sec. 134(c)(3)(E) and §680.600.

Youth

In order to enhance individual participant choice in education and training plans and provide flexibility to service providers, WIOA allows the use of Individual Training Accounts (ITAs) for Out-of-School Youth (OSY), ages 16 to 24, using WIOA youth funds, when appropriate. ITAs allow participants the opportunity to choose the training provider that best meets their needs. To receive funds from an ITA, the training provider must be on the Eligible Training Provider List.

In-School Youth (ISY) cannot use youth program-funded ITAs. However, ISY between the ages of 18 and 21 may co-enroll in the WIOA Adult program if the youth's individual needs, knowledge, skills, and interests align with the WIOA adult program and may receive training services through an ITA funded by the adult program.

Funding of Last Resort

WIOA funds are to be used for training only after the customer has been deemed ineligible for assistance from other sources of funds to pay for training, including Pell Grants, or any other federal, state, or local grants available through the One-Stop Service Delivery System. WIOA funds may be used to enroll customers in the first semester of classes if the time frame for application and award of other grants preclude enrollment in a timely manner. One-Stop Operator or service provider staff shall include documentation of pursued options for alternate funding in the customer's file. If eligible for other funding, continued enrollment and training shall be paid for with funds other than WIOA funds.

Reimbursement

A participant may enroll in WIOA-funded training while his/her application for a Pell Grant is pending. This enrollment is permitted as long as the one-stop operator or service provider has made arrangements with the training provider and the WIOA participant regarding the allocation of the Pell Grant, if it is subsequently awarded. In that case, the training provider must reimburse the one-stop operator or service provider all WIOA funds used to underwrite the training for the amount that the Pell Grant covers.

WIOA Training Cost Limit

The maximum training benefit per customer shall be \$5,500.00 per program year not to exceed \$10,000.00. This limit does not include funds required for accommodations for disabilities, such as interpreters, but includes only the fees for tuition, supplies and supportive services directly applicable to training. Exceptions to the maximum training limit may be granted with prior approval.

Consideration of an exception requires the submission of a written request presenting documentation and rationale. Exceptions up to \$7,000.00 per customer in any one program year may be approved by PWN staff. Exceptions over \$7,000.00 require the approval of the PWN Executive Committee.

In determining whether an individual requires assistance, a one-stop operator or service provider staff, where appropriate, may take into consideration the full cost of participating in training services, including the costs of dependent care and transportation, and other appropriate costs.

While participants can select from the complete ETPL, State and LWDB policies determine the funding amounts for each program. Thus, the PWDB may choose not to fund certain categories of training programs based on, but not limited to, the following reasons:

- Lack of occupational demand for the LWDA
- High tuition cost in comparison to comparable programs
- Lack of a livable wage upon program completion