

**CATTARAUGUS-ALLEGANY WORKFORCE DEVELOPMENT BOARD**

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| **TO:**   | **All One-Stop Career Center Staff and Providers**  |
| **SUBJECT:**   | Individual Training Account (ITA) Policy  |
| **ISSUANCE DATE:**    | June 19, 2009  |
| **EFFECTIVE DATE:**  | September 14, 2016  |

# EXPIRATION DATE: None

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## Priority of Service

The Workforce Development Board (WDB) has determined that the local Priority of Service for those in need of and eligible for Individual Training Account (ITA) services include the following target groups that will receive priority for occupational training:

* Veterans
* Eligible spouses of veterans (per local Priority of Service Policy for Veterans)
* Economically disadvantaged individuals
* Adult recipients of public assistance
* Dislocated workers
* Youth ages 16-24 who are low income
* Unemployed individuals who lack significant work history
* Employed individuals in jobs that do not afford economic self-sufficiency

## Eligibility

By a combination of WIOA regulations and local WDB definitions, Individual Training Accounts (ITAs) are available to participants who:

* Are WIOA enrolled prior to the commencement of training. An individual may be ***registered*** in training at the time of application, but must have not yet begun classes.
* May have begun a program or course of study consisting or more than one semester/training period. In these cases, those participants may ***only apply for assistance for future semesters/training periods*** and the level of academic achievement must be passing.
* Were determined through a comprehensive assessment as unable to obtain employment through intensive services and need formal training in order to gain the skills and qualifications to successfully participate in the workforce.
* Select programs directly linked to employment opportunities as identified on the area’s Demand Occupation List (Appendix A).
* Are unable to obtain other grant assistance or need more assistance than can be received from other sources.
* Meet the training provider’s minimum criteria as demonstrated by TABE test scores and if lacking a high school diploma or equivalency, be enrolled in high school or a HSED program prior to the start of training. *Special consideration shall be made for those with limited English skills*.
* Have a wage at or below the area’s *self-sufficiency level* for those participants who are employed.
* Demonstrate a commitment and desire to successfully complete the training program including the ability to provide other financial resources if all combined assistance will not be sufficient to cover the cost of the chosen program.

## Self-Sufficiency

“Self-sufficiency” is the wage or income level that is considered sufficient to the extent that the individual no longer needs assistance to pursue further skill development. The WDB has defined self-sufficiency as follows:

*The individual does not have a wage that exceeds* ***$ $20.00*** *per hour or is less than $800/week on average monthly. $800/week was arrived at by $$20/hour for 40 hours per week.*

## Process

Individuals can request an ITA from a Career Counselor. Individuals are responsible to research into their chosen field of training including local training providers and program details (including cost, length of program, etc.) The Career Counselor shall provide the local approved provider list from which the individual can choose, or the individual can pursue another provider if they wish. Once the individual has chosen a training provider, the Career Counselor shall assure that provider is on the local list; if not, the Career Counselor shall contact that provider and advise them of the process for applying for approval.

It is best that individuals are aware that the provider approval process may be lengthy and so they must accordingly plan for an appropriate starting date.

Once the Career Counselor has confirmed that the training provider is on the approved list, he/she will prepare the ITA form outlining the starting and ending dates of training, training cost, and if the individual will be receiving any supportive services.

The ITA form is then forwarded to the One Stop Center Manager who will confirm if funding is available and approve the issuance of the ITA.

ITAs will be issued under the following criteria:

* The ITA will be issued only for the purchase of training that will result in completion of a certificate, credential or diploma within a 2-year period.

* An ITA may be issued to either unemployed individuals or those who are employed but have not reached self-sufficiency.

* The ITA will cover, up to the maximum allowable amounts, costs of tuition, books and fees.

* Individuals granted an ITA may also be eligible for additional services to ensure their success in their training program. (See Supportive Service Policy and Needs Related Payments Policy.)

ITAs **may be denied** for the following reasons. (Exceptions may be granted by the One Stop Manager on a case by case basis):

* The individual has a student loan in default, or is in default with the current training institution.[[1]](#footnote-1)
* The individual fails to complete career research.
* The individual has previous training in a Demand Occupation.
* The individual turns in an incomplete application.
* The individual already possess one or more post-secondary degree(s). The individual lacks the prerequisites for the training program.
* The individual may not be able to cover anticipated training costs and training related expenses in excess of the cap limit.
* The training services requested are not directly linked to occupations in demand.
* The training services requested are beyond a bachelor’s level.
* The training services requested are for classes that must be repeated.

## Continued Eligibility

An individual with an approved ITA is not automatically eligible for continued funding if enrolled in a training program of successive periods (for instance, quarters or semesters). In order to retain eligibility, the individual must adhere to the following:

* Provide a copy of grades for each quarter/semester.
* Maintain contact with Career Counselor and provide progress updates.
* Provide changes in contact information or changes in any circumstances that may affect satisfactory progress or completion of the training program.

*An ITA may be revoked or suspended if at any time during the training the participant is not meeting the criteria for successful performance as established by the training provider or as determined acceptable by the One Stop Manager.*

# Allowable Expenses under an ITA

* Tuition
* Technology Fees
* Faculty Student Association Fees
* SUNY Learning Network Fees
* College Processing Fees
* Accident Insurance Fees
* Lab Fees (e.g., physics, engineering, nursing, OTA, biology, physical education, welding, health services physical, etc.)

**Unallowable ITA Expenses and Fees:**

* Textbook & Supplies (These are covered under the Supportive Services Policy unless included in the cost of tuition.)
* Meal Plan
* Health Services Fees
* Health Insurance Fees
* Credit Free Review Session Fees
* Re-Test Fees

## ITA Funding Levels by Occupation

***Level I Training*** – All training must be able to be completed within 6 months. Maximum tuition assistance allowable per individual is capped at **$1,800**. On a case-by-case basis evaluation of an individual’s needs, supportive services, including mileage reimbursement, may be available up to **$250**.

 Dental Assisting

Home Health Aides

Industrial Machinery Mechanics

Licensed Practical and Licensed Vocational Nurses

Machinist

Nursing Assistants

Personal and Home Care Aides

Registered Nurses

Welder, Cutter, Solderer & Brazer

***Level II Training Programs*** – All training must be completed within two (2) calendar years. (Exceptions may be granted upon approval by the One Stop Manager.) Maximum tuition assistance allowable per individual is capped at **$3,000** paid in the last semester of the last year of training. On a case-by-case basis evaluation of an individual’s needs, supportive services, including mileage reimbursement, may be available up to **$500** each academic year.

Accountants

Carpenters

Child, Family and School Social Workers

Computer System Analyst

Computer Programmers

Computer User Support Specialist

Cooks, Restaurant

**Dental Assistants**

Electrical & Electronic Engineering Technician

Electricians

Healthcare Social Workers

Heating, Air Conditioning, Refrigeration and Installation Mechanics

**Industrial Machinery Mechanics**

**Licensed Practical Nurse**

**Machinist**

Mechanical Engineer

Mechanical Drafters

Medical Assistants

Medical Records and Health Information Technicians

Medical Secretaries

Mental Health and Substance Abuse Social Workers

Occupational Therapist

Operating Engineers and Other Construction Equipment Operators

Phlebotomist

Physical Therapist

Physical Therapist Assistant

Plumbers, Pipefitters and Steamfitters

**Preschool Teachers, Except Special Education**

**Registered Nurse**

Substance Abuse and Behavioral Disorder Counselors

**Welder, Cutter, Solderer & Brazer**

**Types of Supportive Services**

An individual may or may not receive the below supportive services based upon eligibility and availability of funds:

* Transportation assistance –The mileage reimbursement is set at the current federal IRS rate, which is subject to change.
* Testing fees
* Clothing and other work-related items
* Child and/or dependent care
* Housing
* Other services as deemed appropriate by the One Stop Center Manager
1. If the customer re-establishes eligibility for Financial Aid by negotiating a success repayment plan with the Higher Education Services Corporation (HESC), the ending institution or grantor, then he/she may be approved for an ITA. [↑](#footnote-ref-1)