
Individual Training Account (ITA) Policy

This policy provides guidance on administering Individual Training Account (ITA) funds in the Northwest Pennsylvania Workforce Development Area (NW170)

An ITA is a funding mechanism through which eligible individuals can access quality trainings that appear on the Eligible Training Provider List (ETPL) to help obtain employment in High Priority Occupations (HPO). Training services must be provided in a manner that maximizes informed consumer choice in selecting an eligible provider.

Funding:

ITA funding is not guaranteed to any participant and is contingent on funding availability.

NWPA Job Connect has set the ITA funding cap at \$5500 per participant. This is not a guarantee of receiving \$5500, but the maximum funding amount that can be spent on the ITA based on the actual costs of the approved training course/program. ITAs may be spent on tuition, fees, required books, and required items for education.

This policy excludes funding for guns, clubs, nightsticks, or mace.

When discretionary grant funding beyond WIOA formula funding has been received in the local workforce development area for training eligible individuals, the maximum funding training cap can be lifted.

For nonresidents of the Northwest Pennsylvania Workforce Development area, ITA funding will be the lesser amount of their local workforce development area ITA funding cap or \$5500.

Requirements:

ITAs will be issued to state-approved training program on the ETPL and connected to HPOs on the approved HPO list for local and other workforce areas across the Commonwealth.

Participants may choose a program from a different workforce area if the commute is reasonable, or they are looking to relocate for employment. Preference should be given to local occupations on the HPO list and programs submitted by the local workforce development area training providers.

Registered Apprenticeships listed on the ETPL qualify for ITA funding. There is no requirement for the occupation to be on the HPO or the PA In Demand Occupation List (IDOL).

Participant & Title I Responsibilities:

1. Complete WIOA enrollment to verify eligibility to receive WIOA funding.
2. Develop an Individual Employment Plan (IEP) or an Individual Service Strategy (ISS) that includes training information with Title I staff. This must be completed prior to ITA funding being issued.
3. Complete an assessment. The local area's preferred assessment is the CASAS (Comprehensive Adult Students Assessment Systems). This is to ensure the participant has the basic Math and Reading skills necessary to successfully complete the selected training program.
 - This assessment may be waived at the discretion of the Title I program services contractor if proficiency is demonstrated and documented in case notes in CWDS.
 - There is no grade level minimum for the CASAS assessment. Title I staff must review the training provider's educational requirements and review the participant's experience, work history, educational status, skills, abilities, and knowledge.
4. Meet the training providers requirements for the selected program/course of study. Documentation that requirements have been met must be provided to Title I staff prior to the ITA approval. These documents must be kept in the participant's file.
5. Complete financial aid forms if the program qualifies. Pell, PHEAA, related grants, and/or scholarships must be used before any WIOA funding is issued. Training providers must provide financial aid documentation to Title I staff. Title I staff must keep copies of the financial aid documentation in the participant's file.
6. Complete a training selection form prior to ITA funding being issued. The training selection form verifies informed customer choice. This document must be kept in the participant's file. Case notes documenting the training providers discussed must be noted in CWDS.
7. Complete a PHEAA Informational Request Document for Title I staff to verify there is no default of student loans. ITA's will not be issued to any participant in default of a student loan. Once the default status is removed, an ITA may be approved.
8. Maintain worksheets to document participant's income and expenses. This must be reviewed with each semester/term funding request. Changes to participant income must be documented in CWDS and the participant file.
9. Participants must maintain, at a minimum, a 2.0 cumulative GPA (on a 4.0 scale), or meet the training provider's minimum GPA requirement if stricter or meet/exceed the training provider's academic standards. Academic probation will suspend the ITA until the participant is no longer on academic probation. The training service in CWDS will be placed on hold in this instance.

Other ITA Information:

- An eligible individual may receive more than one ITA if the training is part of a career pathway in the same industry (i.e. Certified Nursing Assistant to Licensed Practical Nurse career pathway in the healthcare sector).

- Individuals must show proof of successful completion of all prior ITA-funded training.
 - Receipt of more than one ITA requires NWP Job Connect approval.
 - All other requirements of this policy apply to the additional ITAs awarded to an individual. The cap remains at \$5500 per participant.
- It is preferable for the participant to have a high school diploma or equivalent prior to ITA approval. When justified and properly documented, participants may pursue their high school equivalency concurrently with training through an ITA.
 - ITAs are limited to two years. Longer ITAs will be evaluated on a case-by-case basis. ITAs will not be modified in excess of 150% of the advertised length of the program.

Payment:

Upon approval of the ITA, the signed training cost breakdown along with the Letter of Commitment will be sent to the training provider confirming the participant's course/program choice and funding approval.

Funding will be spread across the entire length of the program by semester/term or other standard billing time frame. No invoices will be submitted for payment by the training provider until the first day following the add/drop period per the training provider's refund policy.

Note: There is no obligation to approve funding for participants who start training prior to ITA approval and signing the training cost breakdown.

****Exceptions to payment terms must be discussed with NWP Job Connect prior to issuing payments.**

Required pre-employment clearances and testing may be funded through supportive services. (See NWP Job Connect Supportive Services Policy for more information).

Refunds:

If a participant does not complete training, the standard refund policy of the training provider will apply. The resulting refund will be applied to the program funds from which the original obligation was made. Documentation of reasons for withdrawal/termination as well as refunds must be included in participant files.

The training provider is responsible for repayment of the ITA/WIOA funds used to underwrite training costs for other federal, state, and local aid received after the disbursement of ITA funds. The training provider must refund WIOA program funds prior to issuing any other refunds.

Additional financial information:

- The fiscal agent will not duplicate or pay in addition to any funding awarded from

another local workforce development area or grants.

- ITAs will not be issued for programs in which the expected grants/aid exceed the anticipated semester/term/costs as determined by the participant, training provider, and PA CareerLink® staff.
- ITA funds will not be used to pay for repeat courses.
- ITA funds cannot pay for any prohibited or illegal activities as determined by the Federal government.

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

REFERENCE

WIOA Section 134(c)(3)(G)(i)
20 CFR Part 680.300 – 340

HISTORY

Name	Date	Rev. Level	Description of Change	Effective Date
Deb O'Neil	08/07/2014	A	Policy approved by new LWIB	08/20/2014
Deb O'Neil	10/09/2014	B	Revisions per local plan requirements	12/17/2014
Deb O'Neil	04/02/2015	C	Revise assessment language	04/15/2015
Deb O'Neil	03/28/2017	D	Update language	04/28/2017
Deb O'Neil	08/17/2018	E	Update assessment options for	10/12/2018
Deb O'Neil	10/31/2018	F	Add ITA funding cap exception for special grant funding	12/14/2018
Deb O'Neil	03/29/2019	G	Add flexibility for HPO list occupations and allow for more than one ITA for career pathways	04/12/2019
Deb O'Neil	06/01/2020	H	Add flexibility for CASAS Academy due to COVID-19	07/10/2020

			restrictions	
Deb O'Neil	08/05/2020	I	Add language required by USDOL for Pell Grants and participant income	09/11/2020
Deb O'Neil	09/27/2021	J	Add language to clarify training for RA does not require HPO or PA IDOL	11/12/2021
Susan Richmond	2/21/2025	K	Restructure and update language for clarity	05/16/2025