

# Institutional Skills Training (IST)/Individual Training Account (ITA) Policy

## Institutional Skills Training (IST)

1. Actual cost of tuition, books and fees up to a maximum of \$1,000 a term for full time (12 hours for fall & spring terms, 9 hours for summer term.) Actual cost of tuition, books and fees up to a maximum of \$500 a term for part time (less than 12 hours for fall & spring term, less than 9 hours for summer term).
2. . Books may be paid for through the contract with the local school. If possible, books should be charged at the local bookstore.
3. For quarter systems or special programs, a total amount not to exceed a \$3,000 limit per year will be paid. (Under special circumstances, the WIOA Director/Manager may allow exceptions.)

Note: In order to remain eligible for WIOA financial assistance for books, tuition and fees, all students must meet the guidelines set forth the by their respective educational institutions for retaining financial assistance. Failure to meet the school's criteria for retaining financial assistance will also result in the loss of WIOA funding.

## 4. Online ("Distance Training) Policy

The ability to monitor attendance in training is the primary concern when determining the approvability of distance training for the students. The usual meaning is that the training takes place in a room in a school where students can interact with an instructor. Therefore, the key element to approvability of distance training is based primarily on the interactive nature of the classroom training experience between instructor and student. A means of communication must be established where the instructor can ask questions of the students, and the students can respond and ask questions of the instructor.

Distance training is approvable when it is ***part*** of a curriculum that:

- Leads to the completion of a training program;
- Requires students to interact with instructors;
- Requires students to take periodic tests; and
- Requires students to come onto campus or other approved facility, for tests.

## 5. Payment of Support Services based on Time and Attendance

It is the policy of Region 1 that support services claims for transportation and childcare, which are documented by time and attendance, will be paid when the time and attendance form is received within 30 days of the last date of attendance listed on the form. If this form is received more than 30 days past the last date of attendance, support services for this time period may not be paid.

**NOTE:** Tools/equipment required by a training institution or an employer for enrollment into a specific course or OJT are an allowable cost. Tools/equipment are considered a training expense and may be provided in addition to ITA or OJT funding. Tools/equipment may not exceed \$2,000. *Tools/equipment may be purchased only when required by the school or employer for all students/employees in that course/job.*

NOTE: Under special circumstances, the WIOA Director/Manager may allow exception encompassing all services and amounts. Any exception allowed by the WIOA Director/Manager will be consistent with all WIOA statutory and regulatory requirements and all requirements set for in a National Emergency Grant (if applicable). In the case of an NEG, exceptions must also be approved by the State Dislocated Worker Unit.

### **Individual Training Accounts (ITA)**

Individual Training Accounts are the standardized methodology by which a participant's training costs are funded. It is the mechanism through which funds will be used to make payment only for Adults and Dislocated Workers for purchasing training services from eligible training providers. Participants have the opportunity to select an eligible training provider, maximizing participant choice, in addition to consultation from the participant's case manager. The participant will be referred to the selected training provider unless program funds are insufficient or exhausted. Region I enrollment selection process for an ITA will follow the same process as for selection into WIOA. For residents of Region I, the actual implementation of an ITA will involve the Adult or Dislocated Worker Service Providers. ITAs are subject to cost limitations listed in the Institutional Skills Training (IST) section above.

ITAs will be issued only for approved training programs, and only after career counseling (including Labor Market Information) has been provided by the case manager and documented in the Training Justification form.

All payments issued through an ITA must be warranted through the FND as prescribed earlier in this plan.

The following ITA form is used in Region 1 for Adults and Dislocated Workers:

**REGION #1 EMPLOYMENT & TRAINING**  
**WORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA) TITLE I**  
**INDIVIDUAL TRAINING ACCOUNT (ITA)**

Participant:	ITA Number:
Social Security Number:	Effective Date:
Program:	WIOA Title I:

Service Provider:	Training Provider:
<i>Workforce Innovation &amp; Opportunity Act Title I</i>	<i>School Name</i>
Address	Address
State, City, Zip Code	State, City, Zip Code
Phone	Phone

The above participant has been awarded an ITA through WIOA in the amount of \$ \_\_\_\_\_ to attend your training facility from \_\_\_\_\_ to \_\_\_\_\_. The attached Budget Summary breaks down the maximum amount of money to be used for tuition, required textbooks, and designated required supplies per session. Payment to the Training Provider will be based upon actual costs and may not exceed the amounts/items described in the attached Budget Summary for each fiscal year. Claims will be submitted to the Service Provider each semester (term).

The following items must also be met:

- 1) The Training Provider Program must be listed on the Iowa Certified Training Provider List or have been approved by the Regional Workforce Development Board (RWDB).
- 2) If WIOA initially pays for classroom training costs and the participant receives a PELL Grant, the training provider may be required to reimburse the Service Provider the funds used to underwrite the training. However, reimbursement is not required from the portion of PELL Grant assistance disbursed to the WIOA participant for education-related expenses.
- 3) The established refund policy of the Training Provider will be followed when payment for tuition, fees, or other costs would commonly be refundable in the event a participant withdraws from training.
- 4) The participant under this agreement will be covered in the Service Provider’s limited accident insurance policy while actually attending training.
- 5) The Training Provider will submit to the WIOA Title I Representative copies of participant transcripts, schedules, progress reports, etc. (WIOA Title I form), when required.
- 6) The Training Provider agrees to notify the WIOA Title I Representative of any major difficulty, which could prevent the participant from completing the specified training, as soon as the problem is identified.
- 7) This ITA is contingent upon the availability of federal or state funds and continued authorization for program activities. The Service Provider may rescind this ITA immediately in whole or in part due to the lack of funds or authorization for program activities.

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 Authorized Signatures

Service Provider:

Training Provider:

\_\_\_\_\_

\_\_\_\_\_

Name/Title

Name/Title

Signature

\_\_\_\_\_

\_\_\_\_\_

Name/Title

Signature

INDIVIDUAL TRAINING ACCOUNT (ITA)  
BUDGET SUMMARY/REIMBURSEMENT SCHEDULE

Participant Name:		ITA #:			
Social Security Number:		Modification #:			
Program:		Page: 1			
Term		FY __	FY __	FY __	
<u>Tuition/Fees/Books</u>					
Total					

<u>Tuition/Fees/Books</u>					
Total					

<u>Tuition/Fees/Books</u>					
Total					

<u>Tuition/Fees/Books</u>					
Total					

<u>Tuition/Fees/Books</u>					
Total					

<u>Tuition/Fees/Books</u>					
Total					

		FY __	FY __	FY __	TOTAL
TOTAL OBLIGATIONS BY FISCAL YEAR					

