

Program Year 2019 (*Issued May 2019*)

Career advisors working with enrolled adults and dislocated workers who are receiving *individualized career services*, who are deemed suitable for training will use an ITA to access training services through approved training providers and training programs listed on NCWorks. The ITA is a payment agreement established on behalf of a participant with an eligible training provider. ITA's may include **billable** items from the training provider such as the costs of tuition, books, supplies, and fees required for the course of study.

Other expenses outside of the training provider, such as uniforms, drug and background checks, and exams, should be charged as other training costs and do not count towards the maximum ITA limit.

Prior to the authorization of training, career advisors should ensure the following steps are completed:

- Determine through assessment the individual is in need of training in order to gain or improve employment outcomes.
- Assess the customer's occupational interest and determine if training is related to a demand occupation; will likely result in employment; and is approved in NCWorks.
- Determine the customer's ability to complete the training, taking into consideration other obligations and barriers.
- Determine the individual is unable to obtain grant assistance from other sources to pay the costs of training, or requires assistance beyond available grant resources to pay for training costs.

Training services can be critical to the employment success of many customers. Training programs should lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the High Country, or in an area in which the customer is willing to relocate, that lead to a degree, diploma, certification, and/or license (including those in registered apprenticeship). All training funded by WIOA should be coded as an ITA expense.

WIOA establishes a priority requirement with respect of training funds. Staff should follow the Priority of Service policy and include those individuals with barriers to employment. Supportive services can be made available to customers receiving training services, following local policy.

In general, training assistance is used to support the completion of short term training programs of two years or less. Assistance can be provided towards a Bachelor's degree on a case by case basis if documentation of need is provided. WIOA funds cannot be used to fund advanced/master's degrees. Individuals who already hold a degree, should only receive training assistance if it is determined their current degree will not result in employment and/or the skills are outdated and the training will result in increased earnings.

Limitations & Coordination with Other Financial Aid

Staff and customers are expected to coordinate funding that may be received from other federal, state, local, or private job training programs or sources to assist the individual in obtaining training services. WIOA funds will be used after other funds are applied to the cost of training. However, VA benefits for education and training services do not constitute “other grant assistance” under WIOA and are not required to exhaust their entitlement prior to receiving WIOA funded training.

Each individual enrolled in a training program where student financial aid is available will be required to complete and submit an application for Free Application for Student Financial Aid (FAFSA). Any awarded Pell funds should be applied to the cost of training first. When necessary service providers may implement limitations on funded training services due to budget restraints.

Yearly and Lifetime Limits:

The maximum amount to be spent on an ITA is \$4,300 per customer per year.

The maximum lifetime amount for an ITA is \$8,600 per customer.

However, based on local budgets, limitations may become necessary.

Service providers must establish a tracking log/method to track expenses and expenditures that track ITA limits for each customer that is provided on an annual basis. Payments will be made only to eligible training providers and not directly to customers. Training costs should be coded to the corresponding program in which the customer is enrolled.

Consistent with [DWS Policy Statement 08-2018](#), a Financial Award Analysis (FAA) form should be completed to determine the total cost of training and an analysis of other funds awarded through the financial aid office to determine a need for financial assistance.

An individual may select training that costs more than the maximum amount available for the ITA, if other sources are available to supplement the ITA.

Note: Individuals who are not eligible for Pell assistance due to default on other federal student loans are not eligible for WIOA training funds. Individuals who are placed on Pell probation due to grades may receive assistance as determined on a case by case basis by the service provider under consultation with WDB staff.

Financial assistance for training costs should not be provided to individual’s that do not plan to enter employment. All training should be job-driven.

Progress Towards Completion

Customers are expected to make reasonable progress toward completion of their training with a goal to complete in the appropriate time frame. Progress will be monitored by staff using student transcripts,

schedules, and/or grade reports. Class attendance is required in accordance with the school's policy. Excessive absences should be addressed immediately.

Courses should only be approved for payment when they are part of the customer's curriculum or approved electives. Courses that are not in the curriculum may be approved if the customer can show that it is related to their course of study and is needed to enhance their employability. Required remedial courses may also be funded.

In order to continue to receive training assistance, customers must maintain a grade point average of 2.0 or higher.

If the customer falls below 2.0, they will have one semester to improve their GPA in order to receive on-going training assistance. Through the release of information form signed by the customer, the career advisor may contact the training provider in regard to training progress and/or training costs.

Customers that fail or do not complete a WIOA funded class/program, are not eligible to receive funding for the same class/program again without prior approval.

Withdrawal from Courses/ Changing Curriculum

Customers who wish to withdraw from courses should first check with their academic and career advisor. Students must officially withdraw through the school and should be done by the deadline set forth by the school in order to avoid a failing grade or possible charges and penalties. Any refunds that may be eligible should be returned to WIOA, if WIOA funds were used. Career advisors are responsible for following up on this process.

Changing curriculums should be discussed with their academic and career advisor and should occur on a limited basis. If it is determined that a change is necessary in the program of study, documentation should be included in case notes. Changes in training programs may result in additional costs and time to complete the training and enter employment.

Documentation/Skills Gains/Credentials

Case notes should support the need for training; identify the training program and expected time frame; and include details about the cost and financial support provided. Progress throughout the training period should be documented to include any issues addressed. Training must be included on the **individual employment plan**.

Prior to keying a training activity paid with WIOA funds, the [Training Justification](#) tab must be completed in NCWorks to ensure the individual meets the required conditions.

☐ Training Justification

[Add Training Justification](#)

All customers in training should have an appropriate **training activity keyed** in NCWorks with start and end dates that correspond with the beginning and completion of training. The training activity should remain open during the duration of the program. When keying the activity, and funds are provided through an ITA, the following question should be marked as “yes” in NCWorks.

Participant has been issued an ITA and the ITA will pay for this service:

None Selected ▼

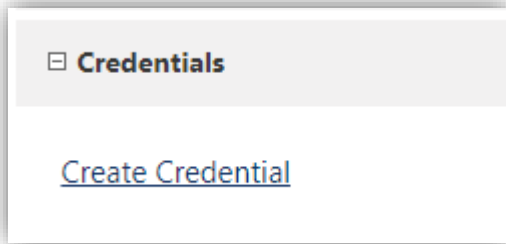
Staff should stress the importance of turning in **grades, credential verification**, and other requested paperwork in a timely manner. Failure to provide the requested information may result in loss of financial support.

Measurable Skills Gains are captured as “real time” data and are only counted ONCE each program year, and apply to all customers enrolled in training. Skills gains can be documented through a postsecondary transcript or report card, or by the successful passage of an exam that is required or a particular occupation or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks, such as knowledge-based exams. All customers should have at least one keyed skills gain each year when successfully completed.

☐ Measurable Skills Gain

[Create Measurable Skills Gain](#)

All customers enrolled in education/training also fall into the credential performance pool. Upon successful completion of the training program and a credential is earned, information must be keyed under the **Create Credential tab** to be captured in performance outcomes. If training is not completed during the enrollment period, credentials can be obtained and keyed up to one year following exit.



Training Completion

The end date of the occupational skills training activity must correspond to a scanned verification source, displaying the same date. Case notes must detail the outcomes of the training program.

Participants and/or the training provider may provide verification of training completion to include documents such as copies of transcript, certificates/diplomas, or school verification by letter/email with completion details. Verification of training completion is also included in the data validation expectations.

Throughout training, staff should address employment goals and strategies to obtain employment upon training completion. Staff should obtain final documentation of training completion and key outcomes appropriately and update the individual's employment plan. Efforts should be made to assist the individual enter self-sufficient employment.

References: WIOA sec. 134(3); 20 CFR 680.200-.230; 680.300-.350; DWS PS 08-2018; TEGL 19-16; TEGL 21-16