

MISSISSIPPI DEPARTMENT of EMPLOYMENT SECURITY
State Policy Number 10
INDIVIDUAL TRAINING ACCOUNT POLICY
Workforce Innovation and Opportunity Act (WIOA)

I. SCOPE AND PURPOSE

The Workforce Innovation and Opportunity Act (WIOA) requires that, with certain limited exemptions, all Title I adult and dislocated worker training services as defined at section 134(b)(3)(E) shall be provided through the use of Individual Training Accounts (ITAs). ITAs are to be used by customers, after consultation with a case manager, to purchase approved training programs, provided by "eligible training providers". Approved programs are those which are maintained on a statewide listing of training providers known as the Eligible Training Provider List (ETPL) System. This policy establishes the minimum requirements Local Workforce Development Boards (LWDB) must set in the development of a local area ITA policy.

II. REQUIREMENTS

An ITA is an account established by the one-stop center on behalf of an eligible WIOA individual. ITAs are funded with adult and dislocated worker funds as authorized under Title I of WIOA. ITAs are to be used to purchase training services for skills in demand occupations from training providers on the statewide eligible training provider list. There is no sequence of service requirements for career services and training. This means that the one-stop center staff may determine training is appropriate regardless of whether the individual has received basic or individualized career services.

- A. The LWDB must establish written procedures that address conditions for the receipt of ITAs. At a minimum these conditions must include:
1. Training services may be made available to an employed and unemployed adult who has met the WIOA eligibility requirements, is unlikely or unable to retain employment that leads to economic self-sufficiency, is in need of training services to obtain or retain employment that leads to economic self-sufficiency, and has the skills and qualifications to successfully participate in the selected program of training services. Career services are listed in WIOA section 134(b)(2)(A). The list in the Act is not all-inclusive and other career services, such as out-of-area job search assistance, literacy activities related to basic workforce readiness, relocation assistance, internships, and work experience may be provided, based on an assessment or individual employment plan.
 2. The one-stop center staff must determine and document in the individual employment plan that the individual is in need of training services and has the skills and qualifications to successfully complete the selected training program.

3. The participant seeking training must agree to apply for Pell Grant or other available financial assistance aid.
4. The participant seeking training services must certify commitment to attend classes and complete the training.
5. The participant seeking training must select a training provider from the state list of eligible training providers for training in a demand occupation with employment opportunities in the local workforce development area or be willing to relocate.
6. The participant seeking training must agree to provide attendance information, grades and/or progress reports while enrolled in WIOA-approved training activities or agree to allow the training provider to release such information to the one-stop center.
7. Upon completion of training, the participant must agree to provide or authorize the provision of documentation of completion of training and when hired, provide name of employer and wage/salary information to the one-stop center.
8. The participant must agree to participate in follow-up activities to determine employment retention and wages at designated intervals.

B. Limitations on ITAs

An ITA may pay for a narrow or broad range of services, but not for intensive services prior to the determination of need for training and selection of a training program. Tuition and fees can be funded by ITAs and LWDBs may permit ITAs to be used for equipment, tools, books, or other costs that increase the probability of successful completion of training.

The LWDB may establish limitations on ITAs. They may not be limited in a manner that undermines the Act's requirement that training services are provided in a manner that maximizes customer choice in the selection of an eligible training provider. Limitations to ITAs may be established in different ways.

1. Based on needs identified in the individual employment plan, the LWDB may impose limits on ITAs, such as limitations on the dollar amount and/or duration.
2. There may be a policy decision by the LWDB to establish a range or amounts and/or a maximum amount applicable to all ITAs.

C. Internal Procedures for ITAs

Payments from ITAs may be made in a variety of ways, including electronic transfer, vouchers, or other appropriate methods. Payments may also be made incrementally through payment of a portion of the costs at different points in the training course. The LWDB must establish internal procedures for the issuance of ITAs that include an approval process for ITAs, application process, description of disbursement procedures, description of a mechanism for tracking expenditures, and a refund policy.

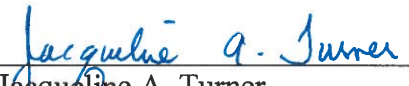
D. Coordination of WIOA Training Funds

WIOA funding for training is limited to participants who are unable to obtain grant assistance from other sources to pay for their training or require assistance beyond that available under grant assistance from other sources. The LWDB must develop procedures to ensure training providers consider the availability of Pell Grants and other sources of grants to pay for training.

A WIOA participant may enroll in WIOA-funded training while their application for Pell Grant is pending as long as the One-Stop operator has made arrangements with the training provider and the WIOA participant regarding allocation of the Pell Grant, if it is subsequently awarded. In that case, the training provider must reimburse the one-stop center the WIOA funds used to underwrite the training for the amount the Pell Grant covers. Reimbursement is not required from the portion of the Pell Grant assistance disbursed to the WIOA participant for education related expenses.

III. EFFECTIVE DATE

The Policy is effective July 1, 2015.



Jacqueline A. Turner
Deputy Executive Director, CFO