

# Individual Training Account (ITA) Policy

Effective: April 14, 2009

**Background:** The Workforce Investment Act (WIA) of 1998 makes funding available for Individual Training Accounts. In accordance with the Act, the Individual Training Account (ITA) is established for eligible individuals to finance training services.

**Policy:** Oswego County Workforce New York will issue Individual Training Accounts (ITA's) for occupational skills training programs that lead to a degree, certificate or license. The training program must address the skills needed for jobs in demand in the labor market.

ITA Cap Amount: \$4,000  
\$7,500 for the duration ARRA funds are available

Timeframe: ITA funded training must be completed within two years.

Priority of Service: Refer to Priority of Service Policy.

Self-Sufficiency Standard: Individuals earning greater than \$25/hour are considered to be self-sufficient and ineligible for an ITA.

Demand Occupation/Skills in Demand: Refer to Demand Occupation Policy.

Availability of Funding: ITA's will be authorized pending the availability of funds.

**Procedure:**

Customer Responsibilities:

Customers interested in accessing an ITA must:

- Attend a WIA Training Overview
- Attest s/he is not in default on a student loan
- Be a Dislocated Worker or be earning an hourly wage that is below the self-sufficiency standard (see above)
- Apply for any financial aid (grants) for which s/he may be eligible  
Note: applicants are only required to apply for grants; not loans.
- Provide an acceptance letter from the school/training program for which the applicant is requesting an ITA.
- Complete and submit the ITA application and any required documentation.

Staff Responsibilities:

Staff are to:

- Ensure the customer is registered in OSOS.
- Complete the DEV requirements and enter appropriate information into OSOS.
- Ensure that the customer has received an initial assessment and that the results are entered in OSOS.
- Provide (or ensure the customer has received) at least one core and one intensive service, and that these services are recorded in OSOS. Determine the customer was unable to obtain suitable employment through these services.
- Sign the customer up to attend the WIA Training Overview.
- Conduct a comprehensive assessment addressing the following issues:
  - Any barriers to employment (beyond skill development) which impede the customers ability to search for and accept and/or retain employment.
  - The employment/occupational goal relevant to the occupations in demand in the local/regional labor market
  - Proficiency in the occupational knowledge, skills and abilities associated with the employment goal.
  - How the requested training will remediate a skill gap and that the individual has the ability to successfully participate in/complete the requested training.
- All information must be documented in OSOS.

Process:

1. The customer attends the training overview.
2. The customer meets one to one with a staff person for a comprehensive assessment and to review the ITA application packet
3. The staff person designates a timeframe for return of the completed packet.
4. If the customer submits the completed ITA packet within designated timeframes. the completed packet is reviewed and the staff person brings a recommendation to the weekly Enrollment/Selection meeting.
5. The staff person notifies the individual in writing of the decision on the request for training.

Note: if the customer does not submit the completed ITA packet/documentation, the customer is sent a letter notifying him/her that their request for an ITA can not be approved because s/he did not complete the application process.