



Tulsa Area Workforce Investment Board, Inc.

Proudly serving Creek, Osage, Pawnee and Tulsa Counties in Oklahoma

Individual Training Account (ITA) Policy

Board Approved: 10 27 2014

907 South Detroit Ave., Tulsa OK 74119 Phone: 918-595-8913

www.workforcetulsa.com

Workforce Tulsa is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. This presentation was financed in whole or part by funds from the US Department of Labor as administered by the Oklahoma Employment Security Commission.

Individual Training Account Policy TU2014-10272014-01

Individual Training Account (ITA) Policy Changes Overview

Most Recent Policy Changes:

Board Approval: 10 27 2014
Executive Committee Approval: 10 14 2014
Oversight Committee Approval: 09 29 2014

Reason: Program Year 2013 Department of Labor Monitoring Finding #5 "TAWIB's One-Stop service provider, DESI, inappropriately obligated ITA amounts at the local level causing ODOC to inaccurately report unliquidated obligations on the quarterly 9130 Financial Report. There are no questioned costs as a result of this finding. Also a change in the requirement of a Cost of Training Form (COTF) for each semester to an annual basis to match state guidance OWDI 16-2013.

Required Action: ODOC must provide documentation supporting that the TAWIB's ITA Policy has been revised to accurately reflect the requirements in TEGL 28-10..."

Rescissions: N/A

Board Approval: 12 19 2013
Executive Committee Approval: 12 18 2013
Oversight Committee Approval: 11 18 2013

Reason: To update the policy with newly released guidance Oklahoma Workforce Development Issuance #16-2013. The change identified within this new guidance was the Service Provider's ability to change the Cost of Training Form to reflect the cost of living if the educational institution did not place that information on the form.

Rescissions: Oklahoma Employment Training Issuance 17-2010 Individual Training Account Policy was rescinded by Oklahoma Workforce Development Issuance #16-2013 Policy on Development of Individual Training Accounts

Board Approval: 08 22 2013
Executive Committee Approval: 08 13 2013
Oversight Committee Approval: 07 29 2013

Reason: The Individual Training Account (ITA) Policy was revised to clarify and simplify processes and procedures for determining who obtains and the creation of an ITA Contract.

Board Approval: 02 23 2012
Executive Committee Approval: 02 14 2012
Oversight Committee Approval: 01 31 2012

Reason: The Individual Training Account (ITA) policy was revised to

- display the updated Oklahoma Employment and Training Issuance #17-2010;
- implement language that explains the consequence of participants' using illegal drugs or alcohol while participating in WIA funded training (Pg. 5)(VII)(4)(e); and
- To implement language that requires any program participant, that uses WIA funds for educational purposes, to have an official copy of their diploma and/or transcripts. (Pg. 5)(VII)(4)(d)

Rescissions:

OETI #17-2010 rescinds OETI #15-2008

Tulsa Area Workforce Investment Board

Individual Training Account (ITA) Policy

Board Approval: 02 23 2012

- I. **Purpose:** To establish the Individual Training Account (ITA) Policy for the Tulsa Workforce Investment Board (TAWIB) in accordance with Federal and State regulations and provide clarification regarding the establishment of Individual Training Accounts (ITAs), the requirements for the coordination with other funding sources, and the requirements for grant recipients to substantiate ITA expenditures. This policy will apply to any participant enrolled in the WIA Adult, Dislocated Worker, National Emergency Grant Program, and Older and/or Out-of-School youth receiving training through an ITA, including Youth enrolled as younger or in-school but who now meet the minimum qualifications for enrolling in post-secondary education.
- II. **Authority:** Oklahoma Workforce Development Issuance 16-2013 Development of Individual Training Accounts; Workforce Investment Act (WIA) §134(d) (4)(B), §134(d)(4)(F-G); WIA Final Regulations Section 663.410, 663.320, 663.652.

III. Definitions:

Eligible Training Provider (ETP) – An entity that has received approval on an application submitted to the WIB and has been placed on the statewide list of eligible providers. An eligible provider is eligible to receive funds from the WIA system for training of students receiving assistance through the WIA.

Individual Employment Plan (IEP) – a plan developed by the participant and the case manager to identify the participant’s employment goals, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.

Individual Service Strategy (ISS) - An agreement of skills and goals decided between a WIA Youth participant and WIA Youth staff counselor (usually a case manager), that sets out a plan for the participant to make progress towards his/her educational and employment goals.

Individual Training Account (ITA) – is defined as an account set aside for an individual that has been determined eligible to receive training services (other than on-the-job training and customized training) under Title I of the Workforce Investment Act (WIA), Adult or Dislocated Worker programs, and as State Waiver citation 664.510 is still standing, Older and Out-of school youth.

Training Voucher (TV) - will be utilized to obligate WIA funding for the approved training program to eligible training providers for partial or total costs of tuition, books, fees and other training related costs (uniforms, tools, etc.) which are required for the participant to complete training.

IV. Local Policy:

The ITA is used to finance training services provided by an eligible training provider in a Board approved demand occupation. In consultation with the WIA Career Manager, the training service selected must be linked to the employment opportunities that are in demand in the local area or in another area to which an adult or dislocated worker receiving such services is willing to relocate. Training in non-demand occupations is not allowable, except

at the discretion of the WIB Director, or OWDI 16-2013 The service provider will follow locally defined Priority of Service policies when enrolling participants in training.

ITAs must be coordinated with other grant sources, through the use of a Coordination of Training Funds (COTF) form (Attachment A), to ensure the use of WIA funds is always secondary to the use of funds from other sources. The amount set aside for the individual shall be recorded on an Individual Training Account and payments will be made through the use of a voucher. The Voucher for Training (Attachment D) is utilized to obligate funding to eligible training providers for partial or total costs of tuition, books, fees, uniforms, equipment and other miscellaneous required items necessary to complete the selected course of study. Items not listed may be approved by the WIB Director on a case by case basis.

1. Participant Requirements:

- A. **Adult/DLW** participants must be determined to need training through a properly developed Individual Employment Plan (IEP) to access training through the use of an ITA.
 - i. As required by law, participants must receive core and intensive service prior to receiving training services. Core and Intensive Services must demonstrate that the participant is unable to obtain or retain employment through such services.
 - ii. Participant must also satisfy the minimum enrollment criteria of the selected program of training to be eligible to receive WIA training funds.
 - iii. Of those participants, the service provider must document within the clients IEP that the participant has need for training in order to reach the Board approved self-sufficiency wage. Service Provider Staff are encouraged to use their discretion to determine what tools, if any, should be used to determine if the client has the necessary skills to be successful in the completion of the selected program of training. Please see Workforce Tulsa's Adult & Dislocated Worker Policy for further information.
 - 1. Assessments: The following assessment are not all inclusive, but are examples of assessment that may be used:
 - a. Basic skills and career identification assessment
 - b. KeyTrain Quick Guide assessment
 - c. Soft skills training where applicable
 - d. Prove it
- B. **Youth participants** must be determined to need training through a properly developed Individual Service Strategy (ISS) to access training through the use of an ITA.
 - i. Participants must also satisfy the minimum enrollment criteria of the selected program of training to be eligible to receive WIA training funds.
 - ii. Of those participants, the service provider must document within the clients ISS that the participant has need for training in order to reach the Board approved self-sufficiency wage.

Assessments will be given to the participant to ensure they hold the necessary skills to be successful in the completion of the selected program of training. Please see Workforce Tulsa's Youth Program and ISS Policy for further information.

1. **Assessments:** The following assessment are not all inclusive, but are examples of assessment that may be used:
 - a. Basic skills and career identification assessment
 - b. Key Train Quick Guide assessment
 - c. Soft skills training where applicable
 - d. Prove it
2. **Demand Occupation Requirements:** The Demand Occupations List should be accessed for customer choice and in the creation of all Individual Training Accounts. ITAs will be issued for approved training programs that address the skills needed for the demand occupations. As per the State of Oklahoma Waiver, Older and Out-of-School youth may select eligible providers from the Eligible Training Provider List.
3. **Customer Choice:** An individual who has been determined eligible for training services may select a provider from the TAWIB eligible training provider list available at the local one-stop center, after consultation with the WIA Career Manager¹ Training services, whether accessed by establishment of ITAs and the providing of vouchers or contracted arrangements will be provided in accordance with the goals and objectives outlined in the client's Individual Employment Plan (IEP) or Individual Service Strategy (ISS).
4. **Training Providers:** The eligible training provider list, as approved by the Local Board and the State of Oklahoma, is available to all potential workforce development customers² and employers in the local one-stop centers in the Workforce Tulsa area.
See Eligible Training Provider Policy for more detail.
5. **Coordination of Training Funds with other Grant Assistance:** Training services are limited to individuals who are unable to obtain other grant assistance for such services or require assistance beyond that available under grant assistance programs including Pell Grants. The ITA must be coordinated with all other available sources of financial assistance, including other Federal programs but excluding loans, in determining an individual's overall need for WIA funds to pay for allowable training costs. This is intended to ensure that WIA funds supplement other sources of training grants.

Participants will be assisted early in the assessment process, as appropriate, to establish eligibility Higher Education Act Title IV funds and other forms of financial aid. Participants will receive information on Higher Education Act Title IV funds through the training provider financial aid office, websites, resource room, and local area resource brochures at the point a participant is assessed as in need of training services. Financial aid applications are accessible online at www.FAFSA.ed.gov. Any participant receiving training services will be required to have a Coordination of Training Funds (COTF) form completed by the training provider financial aid office prior to approval for training services on an annual basis. If the training provider and the

¹ 20 CFR Part 633 §663.440(c)

² OWDI 07-2013 Eligible Training Provider Program

training program are Pell eligible, the participant receiving WIA training services will be required to apply for Pell grant assistance.

To the extent practicable, resources will be coordinated sufficiently to meet the education-related costs of services so the participant can afford to successfully complete the agreed-upon program of training services. WIA Career Managers are required to document the mix of funds utilized for financing of training services to ensure a participant's un-met need is not exceeded and duplicate payment of costs is avoided. WIA participants are not required to apply for or to access student loans or incur personal debt as a condition of participation. However, the participant may incur personal debt. Counseling regarding the responsibilities associated with the indebtedness should be provided to participant if Career Manager is made aware of such intent. The Career Manager will document in program notes that such counseling has been provided.

The COTF must be completed by a financial aid officer before WIA training is approved and will be used to document the participant's awards and need for financial assistance. A new COTF form is required annually.

Non Pell eligible training providers do not calculate the unmet need in the same manner as Pell eligible providers. In the event the COTF form section III indicates the training provider is not Pell eligible and the unmet financial need equals the cost of attendance, the service provider may provide supportive services in excess of the unmet financial need, as long as it has been documented as a need in the participant's Oklahoma Service Link (OSL) file and that supportive service is required to allow the client to participate or continue in a WIA occupational skills training activity.

WIA service providers, entities administering alternate sources of funds, and eligible training providers are responsible for ensuring and so documenting that tuition-specific awards from all other sources have been applied to the tuition/fees costs first.

Documentation of all funding coordination efforts will be recorded in the participant's IEP in the Economic Need Statement and Planning. The Career Manager will use this area to report available funding and to explain how grants will be used to pay training costs, including cost of living during the training period.

6. Establishing an Individual Training Account (ITA):

- A. Older or Out of school youth who are co-enrolled into the Adult program must receive Youth Formula funding as their primary funding source for ITAs unless those funds are exhausted and/or further instruction is given by the WIB Director to utilize Adult Formula Funding for co-enrolled youth ITAs.
- B. An Individual Training Account (ITA) has a cost limitation (cumulative training expenditures/ obligations) of a maximum of \$10,000.00 in a two year period and no more than \$5,000 a program year. The ITA itself should only be issued for the participant's determined unmet need, up to the maximum amount. The amount of expenses for board approved TAWIB Demand Occupations relating to the health care industry shall not exceed \$14,000.00 for any student, and no more than \$7,000.00 in expenses may be paid in each program year. Projected training costs do not meet the definitions of obligations found in 29 CFR 97.3 as they do not meet the requirement of being definite

and certain, nor do they constitute a legal liability until the participant is registered in a specific course.³

- C. Participants have a maximum of two (2) years to complete a training services program as described in this policy and as described in his/her Individual Employment Plan (IEP) or Individual Service Strategy (ISS). Individual Training Accounts have an expiration date of two years from the ITA start date, unless initially approved by the WIB Director. Renewals/extensions beyond two years must have the WIB Director's written approval. The request must be submitted in writing and contain justification as to the extenuating circumstances that prevented the completion of the training program in the allotted time. (Examples: illness that prevents attendance; courses not being available sequentially in the order required to complete in a two-year period; etc.) If an extension is approved, an ITA Modification will be completed by the WIA Career Manager. A letter approving the extension should be attached to the ITA Modification. An appropriate program note must be entered in the OSL file.
 - D. The COTF must prove an unmet need before an ITA can be established and a Voucher for Training issued. The COTF, signed by the financial aid officer, will record the participant training-related financial assistance needs and the mix of funding assistance, concluding with the participant's unmet need. The COTF form shall include participant authorization to release information to the One-stop Operator.
 - E. The ITA is established by the WIA Career Manager on behalf of the participant at an amount that is appropriate for his/her training program financial need. The Career Manager must ensure that the most current eligible training provider list and costs are available in order to determine the amount of the ITA for each individual participant. Financial Aid officers should be made aware that any changes that may occur to the current unmet need amount and must be immediately reported to the participant's WIA Career Manager.
 - F. When an ITA is established, staff must record the services associated with the ITA in the OSL Service and Training Plan with a correlating detailed program note and must ensure that ITA documentation required by current state/TAWIB policy is scanned and uploaded to the appropriate enrollment. ITA support documentation includes:
 - i. COTF,
 - ii. acceptance letter to training or other proof of enrollment,
 - iii. ITA Agreement/Contract with participant (As per OETI #17-2010)
 - iv. Voucher for Training.
- Additional guidance is provided in OWDI 03-2013, Attachment A or subsequent issuances.
- G. ITAs will not be established for training that is fully funded with TAA funds.

³ U.S. Department of Labor's Training and Employment Guidance Letter (TEGL) No. 28-10, Section 4 (c)

- H. Participants must meet or exceed attendance and academic requirements of the school/training provider. Failure to do so may result in the revocation of the participant's ITA. Limited exceptions may be approved by the WIA Project Director.
 - I. The ITA has a start and end date and all vouchers issued during that time will be deducted from the Individual Training Account amount. The service provider fiscal department will have the authority to deny payment of a voucher if the ITA Policy is not being followed.
 - J. Continued participation is subject to continued availability of funding by the Department of Labor.
 - K. ITA funding may be used to pay only for classes or training directly related to the training/degree plan. ITA funding will not be used to pay for the same class more than once.
 - L. The TAWIB will require that a copy of the official diploma and/or transcript be produced for every graduate who is provided a stipend, or for which WIA Youth, Adult and Dislocated Worker funds assisted with a participant's education.
 - M. The TAWIB will require that any Adult or Dislocated Worker program participant who fails a training component due to drug or alcohol use, attend drug or alcohol abuse counseling/treatment as a prerequisite to further expenditure of training funds.
 - N. The TAWIB will require any Youth program participant who fails a training component due to drug or alcohol use, attend drug or alcohol abuse counseling/treatment as a prerequisite to further involvement in Work Experience and Individual Training Account contracts.
7. **Voucher for Training:** A **Voucher for Training** will be utilized to obligate WIA funding for the approved training program to eligible training providers for partial or total costs of tuition, books, fees and other training related costs (uniforms, tools, etc.) which are required for the participant to complete training. Training-related costs not available through the eligible training provider must be provided as supportive services in accordance with the TAWIB Supportive Service Policy. Supportive services are not paid out of the ITA. Mileage reimbursement is a supportive service and is obligated on the voucher for the specific training period. The voucher will be signed by the participant and the Career Manager and will be submitted to the training provider. The training provider is instructed to submit invoices and receipts for payment and is not required to return the voucher.

Prior to the beginning of each semester, the participant must return to the WIA office and consult with his/her Career Manager. A voucher will be issued for each new semester or billing cycle. The issuance of a voucher will be at the discretion of the Career Manager based on successful completion of the previous semester, appropriate progress in training goal and the balance of funds available in the ITA.

8. **Individual Training Account Modification:** In some circumstances the Individual Training Account or Voucher for Training may require a modification. The WIA Career Manager will make a copy of the document

that requires modification, strike through information to be corrected, write in the changes and initial and date beside those changes and submit to the service provider fiscal department. A program note will be entered justifying the modification. The participant and/or training provider will be appropriately advised of the modification and a program note will be entered. A copy of the modified document will be uploaded in the system.

If additional funding is being requested: Total amount of funding to be spent on ITA including modification amount cannot exceed original unmet training need plus the new unmet training need.

- A. Documents required by TAWIB for approval of an ITA modification:
 - i. Copy of original ITA
 - ii. ITA modification request form
 - iii. ITA account balance worksheet
 - iv. ~~ITA planning summary~~
 - v. Copy of unmet need worksheet
 - vi. OSL Copy of Client program notes of ITA modification request
 - vii. OSL Copy of Economic Need Statement of ITA modification request
 - viii. OSL Employment Plan Modification

- B. Supporting documentation – need for modification due to circumstances beyond the client’s control to complete training and gain employment in the field of study.
 - i. Examples of extenuating circumstances:
 - 1. Increases in tuition or education related fees, books, tools etc.
 - 2. Increases in length of time required by the institution to complete training.
 - 3. Personal circumstances preventing client from completing the training within the training time.
 - 4. Changes in funding availability.

 - ii. Supporting documentation examples:
 - 1. University catalogs
 - 2. Letters from the institution’s Registrar or Bursar
 - 3. Letters from institution designated academic advisor
 - 4. Institutions change in program such as schedule (must be accompanied by state approved training providers list)
 - 5. Medical emergency documentation such as bills or letters

- 9. **Account Tracking:** WIA Career Managers and the service provider fiscal department are required to track each participant’s ITA expenditures and balance to ensure spending does not exceed the ITA agreement. ITA expenses and supportive service payments are tracked to avoid exceeding the unmet need indicated on the COTF. Current tracking tools and ITA documentation will be maintained in the OSL upload section. Sample tracking tools utilized by service provider are found in the attachment section of this policy.

ITA documents including the Coordination of Training Funds, Individual Training Account, Voucher for Training and acceptance letter from training provider/proof of enrollment will be uploaded in the participant file and also maintained in the fiscal hardcopy file. When appropriate, the Career Manager may upload the degree plan and unofficial transcript to the ITA section.

- 10. Exceptions to the ITA Policy Requirements:** ITAs are the primary method under WIA for providing occupational skills training leading to a degree, certification, or employer recognized skill certificate. However, contracts for services may be used instead of ITAs only when one of the following exceptions applies:
- A. The services provided are on-the-job (OJT) training or customized training;
 - B. The Board determines there is a training services program of demonstrated effectiveness offered in the Tulsa Workforce Investment Area by a community-based organization or another private organization which serves populations that face multiple barriers to employment, such as:
 - a. Individuals with substantial language or cultural barriers;
 - b. Offenders;
 - c. Homeless Individuals; and,
 - d. Other hard to serve populations as described by OESC.

WIA Career Managers must adhere to the following procedures for Board approval of institutions or entities that will provide customized training or training for individuals with multiple barriers. The following information must be provided to the WIB Director for obtainment of Board approval:

- 1. Identify and/or describe the individual's multiple barriers to employment;
- 2. Obtain the name, address, telephone number, and contact name of the training institution, community based organization or private organization that provides such training services;
- 3. Obtain signed audit statement or financial record from entity describing their financial stability;
- 4. Obtain performance data from the entity for the following: program completion rate, attainment of skills, certificates or degrees the program is designed to provide, placement rates in unsubsidized employment), retention in unsubsidized employment and average wage at placement.

After Board review and determination, the WIB Director will notify the WIA Project Director of approval/disapproval of the potential training provider.

V. Compliance:

- 1. The TAWIB is responsible for providing regular oversight of ITA delivery in accordance with the local monitoring policy.

2. This policy shall be applied in accordance with the TAWIB's Adult and Dislocated Worker Policy, Youth Policy, Demand Occupations Policy, Supportive Services Policy and Local Monitoring Policy.

VI. Attachments:

Attachment A: Coordination of Training Funds

Attachment B: Individual Training Account Form

Attachment C: Voucher for Training

Attachment D: Individual Training Account Tracking Sheet

Coordination of Training Funds

Section 1

To: _____ From: _____
 School: _____ Attention: _____
 Address: _____ Address: _____

Section 2

Participant Name: _____ ID Number: _____

I hereby authorize the exchange of information between the WIA Case Manager and the Financial Aid Office at the above name School regarding the awarding of any financial aid from any source.

_____ Date
 Participants Signature

Section 3 The following section is to be completed by the financial aid office.

Cost of Attendance		Student's Financial Aid	
Tuition	\$ _____	PELL Grant Eligibility	\$ _____
Fees	\$ _____	_____ was <u>not</u> eligible due to _____	
Supplies	\$ _____	_____ Training Provider is <u>not</u> PELL eligible	
Books	\$ _____	OTAG	\$ _____
Tools	\$ _____	OLAP	\$ _____
Uniforms	\$ _____	SEOG	\$ _____
Other (Please Specify)	\$ _____	Tribal/BIA	\$ _____
	\$ _____	R.O.T.C	\$ _____
	\$ _____	Tuition Waiver	\$ _____
	\$ _____	Vocational Rehabilitation	\$ _____
		Scholarship(s)	\$ _____
		Other (Please do not include loans)	\$ _____

Periods Covered:

- Fall _____ Trimester I Full Length of Short Course
 Spring _____ Trimester II
 Summer _____ Trimester III

Cost of Attendance \$ _____ minus Students Financial Aid \$ _____ equals unmet financial need \$ _____

By signing below, the financial aid officer (or those personnel who perform those duties) agrees to inform the local WIA program operator of the amounts and disposition of financial aid to each participant awarded after the enrollment of the participant, as part of a continuing, regular information sharing process.

_____ Date
 Financial Officer

Section 4 Alternate sources of Funding (for WIA Office Use Only)

_____ YES Program _____ \$ _____
 _____ YES Program _____ \$ _____

Unmet financial need from Sec. 3 \$ _____ minus alternate funding from Sec. 4 \$ _____ equals adjusted unmet financial need \$ _____

I certify that funds are not available or are inadequate from other financial resources such as TAA to ensure the participant's needs are met. After review of partner agencies, other social service agencies, and other community resources. I have determined that WIA funds must be used in the mix of available resources. I certify that WIA funds will be coordinated with other funds and there will be no duplication of resources.

YES NO Corrections were needed and made by the WIA Service Provider in Section 3 to demonstrate appropriate cost of living. _____
 Program Note Date

_____ Date
 WIA Service Provider

Individual Training Account (ITA)

Participant Name: _____ OSL ID: _____ ITA Number: _____

ITA Start Date: _____ ITA End Date: _____

Amount of Individual Training Account (ITA): \$ _____

Training Provider: _____ Training Program: _____

Demand Occupation: _____ Program Funding: _____

ACKNOWLEDGEMENT AND AGREEMENT

- The amount of my ITA has been awarded based on individual factors including cost of attendance, coordination of other funding sources, and needs identified in my IEP.
- ITA funding may be used to assist with tuition and fees as well as books, uniforms, tools, equipment, or supplies required for training/degree plan.
- This ITA is limited to the amount and the scheduled start and end date stated above. Any addition to ITA funding or extension of the ending date must be approved by the WIB Director and would be approved only for exceptional circumstances.
- It is my responsibility to budget and track my ITA expenditures to insure that the funds available to me are not depleted prior to completion of training. I will coordinate with my Career Manager and verify my ITA balance as necessary.
- I understand that I must meet or exceed attendance and academic requirements of the school/training provider.
- I understand that I am not required to access student loans or incur personal debt as a condition of participation. However, if I chose to do so, I understand the responsibilities associated with such indebtedness, including loan repayment. My Career Manager has counseled me in regard to this issue.
- Continued participation is subject to continued availability of funding by the Department of Labor.
- I agree to monthly contact with my Career Manager to discuss my training progress and any other issues, whether academic, personal, or financial, that may affect the successful completion of my training.
- I will immediately inform my Career Manager of changes of name, address, phone number, or back-up contact information.
- Prior to the beginning of each new semester I will schedule an appointment with my Career Manager to complete a voucher for the upcoming semester. I agree to provide any documentation necessary for completion of the voucher, which may include class schedule, enrollment sheet, grade report from previous semester, and financial aid award letter.
- In the event that I drop or add a class, I will notify my Career Manager immediately.
- ITA funding may be used to pay only for classes or training directly related to my training/degree plan. ITA funding will not be used to pay for the same class more than once. If I fail a class, I will be responsible for paying for such class the second time.
- Upon completion of my training, I agree to provide my Career Manager with information concerning my employment and copies of any diplomas, credentials, or licenses earned.

I have read this document and hereby understand and agree to comply with the terms herein described. I am receiving a copy of this agreement for my records.

ITA Participant's Signature

Date

I have established this ITA and reviewed the terms of this Agreement with the participant.

WIA Service Provider's Signature

Date

Quality Assurance Manager

Date

Workforce Tulsa is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.
This presentation was financed in whole or part by funds from the US Department of Labor as administered by the Oklahoma Employment Security Commission.

VOUCHER FOR TRAINING

Training Provider: _____ Training Program: _____

Participant Name: _____ Participant ID Number: _____

WIA PROGRAM / TRAINING COST:

TITLE [] ADULT [] YOUTH [] DISLOCATED WORKER [] TAA [] OTHER _____

Service Provider has agreed to sponsor the above named student in the course(s) or program listed below and pay the training costs listed (based on off-the-shelf catalog prices) for the time period of _____ through _____.

THIS VOUCHER IS FOR TRAINING PROVIDER RECORDS AND DOES NOT NEED TO BE RETURNED TO WORKFORCE TULSA SERVICE PROVIDER.

Contractor must submit appropriate invoices, receipts, and/or refunds to Workforce Tulsa Service Provider, 14002 E. 21st St., Ste. 1030 Tulsa, OK 74134.

COURSE #	COURSE TITLE	HOURS

AUTHORIZED TRAINING COSTS

Item	Amount	Item	Amount
		Equipment and/or Tools	
		Uniforms	

MILEAGE INFORMATION: (Student – initial one of the following)

- A. _____ The following mileage allowance will be paid to the student: Travel (\$ _____ /DAY...x _____ DAYS.....Total \$ _____)
- B. _____ Student acknowledges **NO** mileage allowance will be paid.

As a recipient of WIA assistance with tuition, fees, books, or required supplies, I hereby authorize the training institution listed above to release information concerning my attendance, grades, and schedules to the Service Provider Staff.

Participant's Signature

Date

Career Manager Signature

Date

Workforce Tulsa is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. This presentation was financed in whole or part by funds from the US Department of Labor as administered by the Oklahoma Employment Security Commission.

Attachment C

Individual Training Account Policy TU2014-10272014-01

