



Individual Training Accounts (ITA)

South Central Workforce Council

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Individual Training Accounts (ITA)

An Individual Training Account is a payment agreement established on behalf of a participant with a training provider.

MN DEED - WIOA Young Adult Program

- **Chapter 12: Individual Training Accounts (ITAs)**

Individual Training Accounts (ITAs) can be an important tool in assisting both in-school youth, ages 16-21, and out-of-school youth, ages 16-24, in completing education and training coursework as part of a career pathway.

<https://mn.gov/deed/programs-services/office-youth-development/youth-programs/wioa-youth.jsp>.



Individual Training Accounts (ITA)

- The follow steps are used for In-School and Out-of-School Youth interested in and appropriate for post-secondary training:
 - Career Assessment
 - Review of career assessment and occupational research packet with youth
 - Occupational Research Packet
 - Approval of training plan and ITA
 - *Ability to complete the training*
 - *Appropriate career path supported by local labor market information*
 - *Certified WIOA training program*
 - Signed ITA and update the Individual Service Strategy
 - School documents received
 - Issue Training Payment



Individual Training Accounts (ITA)

Ability to complete the training

- **Career Assessment** *(Career Occupational Preference System (COPS System) Comprehensive Career Guide)*
- Academic Assessments
- Comprehensive Assessment
 - Education
 - Work history
 - Supports (health related, emotional, academically, childcare, transportation)
- Financial Worksheet



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Appropriate career path supported by local labor market information

- **Occupational Research Packet** (career assessment, budget, **LMI research, interviews, job postings and Career Goal**)
 - Review of Labor Market Information (DEED Data Tools, CareerWise, CareerOneStop, Occupational Outlook Handbook, South Central Demand Occupation list)
 - Informational Interview (someone employed in the career interest area)
 - Employer Survey
 - Career Goal
 - Three current job positing that supports the training requested



Individual Training Accounts (ITA)

Certified training provider

- Career & Education Explorer Website – Eligible Training Provider List (ETPL) & WIOA Certified
 - Requirement in the Occupational Research Packet
 - WIOA Youth –If an ITA is used training program must be WIOA certified and on the ETPL



Individual Training Accounts (ITA)

Approval of training plan and ITA

MINNESOTA VALLEY ACTION COUNCIL INDIVIDUAL TRAINING ACCOUNT

I. TO BE COMPLETED BY STUDENT AND EMPLOYMENT COUNSELOR

Print Name _____ Date of Birth _____ Student ID/Social Security No. _____

Employment and Training Program: _____

MVAC Counselor:	School/Training Provider:
Name: _____	Name: _____
Address: _____	Address: _____
Phone: _____	Phone: _____
Fax: _____	Fax: _____
Email: _____	Email: _____

II. TO BE COMPLETED BY SCHOOL – ESTIMATED NEED ANALYSIS
Financial Aid Office: Please complete and return all copies to the MVAC Counselor indicated above to determine program funding. Once program funding is determined, a copy of this form will be mailed to you for the student's account. Upon completion of program, the school will supply a copy of credential received; a transcript showing credential received, certificate of completion or copy of diploma.

Financial Aid Analysis	Requested for the _____ to _____ academic year					
	Fall Semester/Quarter	Winter Quarter (if applicable)	Spring Semester/Quarter	Summer I	Summer II	Total
Tuition						
Fees						
Books & Supplies						
Gift Aid Awarded*						

* All grants and scholarships. (Does not include loans or work study)

Comments: _____

Signature of Financial Aid Officer _____ Date _____

III. TO BE COMPLETED BY MVAC COUNSELOR

MVAC Estimated / Proposed Funding						
	Fall Semester/Quarter	Winter Quarter (if applicable)	Spring Semester/Quarter	Summer I	Summer II	Total
Training:						
Tuition/Fees						
Books/Supplies						
Tools						
Support:						
Transportation						
Childcare						
Living expense						

AGREEMENT

INFORMATION ON THIS FORM SHOULD PREVENT DUPLICATION OF FUNDING. This agreement outlines financial aid available for post-secondary training, the source of the award, the dollar amount and the purpose which each is to be used. This agreement represents a projected plan and can be amended as the school term progresses and/or changes become necessary. The post-secondary institution and participant/student will inform MVAC of any proposed changes in the school plan involving financial aid or number of credits.

CONSENT FOR RELEASE OF INFORMATION – I hereby authorize the post-secondary educational institution listed above to release information for the purpose of determining eligibility and funding. I understand I may revoke this consent upon written notice (not retroactive) and this consent will expire two (2) years after the date of my signature.

I have read and understand the Agreement and the Consent for Release of Information above.

Signature of Applicant _____ Date _____ MVAC Counselor Signature _____ Date _____

White Copy – Office file _____ Yellow Copy – Training Facility _____ Pink Copy – Participant _____

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- Approval of training plan and signing the ITA
 - Ability to complete the training (assessments & financial worksheet)
 - Appropriate career path supported by local labor market information (ORP)
 - Certified training provider (ETPL & WIOA Certification)
- Individual Training Account Form
 - Identifies all resources provided to the youth for their training plans
 - Tuition, Books, Support
 - Covers one school year
 - Signed by youth & counselor
 - Youth receives copy
 - Reviewed on a semester/quarter basis
- ITA is sent to the Training Provider
 - Helps prevent financial aid overpayment
- Update Individual Service Strategy (ISS)



Individual Training Accounts (ITA)

School documentation and Training Payment

- School Documentation
 - Financial aid award letter
 - School schedule
 - Tuition bill
 - Book costs
 - Term grades (review progress for continued ITA support)
- Training Payment
 - Payments made directly to the post-secondary institution by a voucher



Questions?

- Minnesota WIOA Youth Policies – Chapter 12 Individual Training Accounts (ITAs)
 - <https://mn.gov/deed/programs-services/office-youth-development/youth-programs/wioa-youth.jsp>
- Check your local Workforce Development Area's policy for developing Individual Training Accounts (ITAs)
 - WIOA Region #5 Provision of Training Policy
<http://www.workforcecouncil.org/regional-local-policies/>



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