



Procedure for the Granting of Individual Training Accounts

I. INTRODUCTION

Training activities for eligible participants are provided by Training Service Providers through Individual Training Accounts (ITA's). Flexibility is provided to Local Boards in the management of ITAs concerning duration, the limit of funds to be allocated to each ITA, and exceptions. These restrictions may not be used to establish arbitrary limits to exclude eligible training service providers. ITA's are a financial arrangement established with a training provider on behalf of the participant.

II. LEGAL BASIS

Sections 134(c)(3)(F)(iii) and (G)(i) of the Workforce Innovation and Opportunity Act (WIOA).

(WIOA) Sections 680.300; 680.310; 680.310; 680.310

Sections 680.300; 680.310; 680.320; 680.330; 680.340; 681.550 of the WIOA Final Regulations;

TEGL 19-16 issued by the Employment and Training Program attached to the United States Department of Labor on March 1, 2017.

Public Policy for Granting Individual Training Accounts (ITA'S) on October 27.

III. DEFINITIONS

1. **Local Workforce Development Board (Local Board):** A body created under Section 107 of the WIOA Act, this body, in coordination with the Boards of Mayors, shares the responsibility for establishing public policy in connection with the development of the

- Local Area's workforce and for carrying out the functions and responsibilities set forth in the WIOA Act.
2. **Mayagüez-Las Marías Local Workforce Development Area:** Pursuant to Section 106 (b) of the WIOA Act, this is a territorial delimitation established taking into consideration multiple criteria, among which are labor market demand and regional economic development. This is to authorize the allocation of Title I-B funds.
 3. **Individual Training Accounts (ITA'S):** Training activities for eligible participants are provided by Training Service Providers through Individual Training Accounts (ITA'S). The primary purpose of an ITA is to guarantee the empowerment conferred by law to eligible participants in selecting the training program of their choice. The participant's chosen training program must be included in the State List of Training Service Providers. It will be an in-demand occupation in the Mayagüez - Las Marías Local Area or another area where the participant can relocate.
 4. **Career Planner and/or Case Manager (Career Planner):** The Career Planner provides Individualized Career Services. Among them, he/she prepares the Individual Employment Plan with the participant, considering the participant's skills, abilities, education, employment experience, and occupational interests.
 5. **Statewide List of Training Service Providers:** a list issued by the Workforce Development Program (PDL in Spanish) upon the recommendation of the Local Board, which includes programs eligible to be considered for an ITA. The list contains program information such as the Service Provider offering the program, the municipality where it is located, credits, cost, and provider performance for that specific program.
 6. **Training Program:** Post-secondary training offered by a service provider duly authorized by the Puerto Rico Council of Education to offer programs to obtain a college degree (Associate's Degree or Bachelor's Degree) and/or a Vocational Technical Certificate. These programs must be in demand, and only those included in the State List of Training Service Providers may be offered.
 7. **Institution or Service Provider:** an institution organized under the laws of the Commonwealth of Puerto Rico, authorized and licensed by the Puerto Rico Council of Education to offer Training Programs and grant Academic Degrees (Associate's and Bachelor's degrees) and/or Vocational Technical Certificates.
 8. **Participant:** an individual who, after receiving Basic Career Services, was determined eligible under the eligibility criteria of the Youth, Adult, and Dislocated Worker programs.
 9. **Support Services:** WIOA states that appropriate Support Services will be provided to participants in the Adult, Dislocated Worker, and Youth Programs who:
 - Are participating in activities authorized under the Act, and
 - Are unable to obtain services through other programs that offer the same services.

These include, but are not limited to, the following: linkages to community services, transportation assistance, child and dependent care, housing, Need Related Payment (NRP), educational testing, reasonable accommodation to participants with

disabilities, referral to health services, uniforms or other appropriate clothing for the job, work tools, including eyeglasses and safety glasses.

IV. GENERAL PROVISIONS

1. Through the Single Management System, youth, adults, and dislocated workers will have access to lists of eligible training providers and available training programs. The lists include information related to costs and compliance, among other things.
2. Youth, adults, and dislocated workers consult with the Career Planner and select the training provider from the Statewide List of Training Service Providers.
3. Training providers and their programs will have to meet the performance standards established by the Local Board and the Workforce Development Program (PDL). This means they will have to demonstrate successful performance to maintain their eligibility on the Provider Registry and receive funding under WIOA.
4. The Local Board established as public policy that the duration of an ITA shall not exceed a period of twenty-four (24) months unless the individual service strategy so provides. The final approval of this extended service before its commencement rests with the Local Board. The Local Board reserves the right to request additional information beyond that provided in the Service Strategy and to interview the Career Planner and the participant. The Local Board may approve up to one Bachelor's degree.
5. The Local Board established as public policy that the cost of an ITA shall not exceed \$10,000.00 (WIOA contribution) per participant. It is further established that in particular cases where the cost exceeds the established limit, the final approval of the service rests with the Local Board under the same conditions as above. In addition, any possibility of combining funds with PELL Grants or other available assistance must have been exhausted.
6. If a participant has completed two years before completing a bachelor's degree, an ITA may be granted to complete the last two (2) years of studies. The Career Planner will consider the factors that did not allow him/her to complete the degree as part of the evaluation process. The participant must submit a transcript of credits and a certificate of non-debt of studies whose periods have not been subsidized by the WIOA Act. The progress report or transcript of credits will be determinant in the approval of the ITA (in terms of satisfactory progress and total credits approved), in addition to the availability of funds.
7. Any client who is defaulting or defaulting with the federal government for debt may be considered for tuition as long as he/she meets the requirements outlined in the preceding paragraph. You must prove that you were denied a Pell Grant and the possibility of receiving alternative aid.
8. Combining funds with any obligated partner or other aid (such as federal,

legislative, and institutional grants) must be evidenced to avoid paying twice for the same services through the ITA.

9. If a participant selects a Service Provider from another ALDL, it must be a training that is in demand in the Mayaguez-Las Marias Local Workforce Development Area or in a Local Area where he/she is willing to relocate. The participant must demonstrate how he/she will pay the additional costs over and above the amount allocated for the ITA.
10. In addition to training costs, participants will be provided with Support Services and Need-Related Payment (NRP) according to their needs, available funds, and participation or assistance obtained from other programs or System Partners.
11. Training services will be made available to employed or unemployed adults and dislocated workers who:
 - a. After an interview, assessment, and career planning:
 - i. They are unlikely or unable to obtain or retain employment that will lead them to become financially self-sufficient or to receive wages comparable to or greater than what they were receiving through the offer of career services.
 - ii. They need training services to obtain or retain employment that will lead them to become financially self-sufficient or to receive wages comparable to or greater than those received in their previous jobs.
 - iii. Have the skills and qualifications to participate in training services successfully.
 - iv. They select a training program directly linked to employment opportunities in the local area, economic region, or another area to which they are willing to relocate.
 - v. Cannot obtain financial assistance from other sources to pay for the cost of training.
 - vi. If training services are provided with Adult Program funds, the priorities set forth in Section 134(c)(3)(E) of WIOA will be met.
 - vii. The Occupational Skills Development element of the Youth Program will be offered through the ITA's modality. Out-of-school youth ages 16-24 are eligible. The Statewide List of Training Service Providers will be used. The youth, in conjunction with the Career Planner, will select the training program.

V. PROCEDURE

To promote the participant's success in reaching his or her occupational goal, the Career Planner should follow the following steps:

1. Guide the participant on the Training Programs available using the State List of Training Service Providers.
2. Guide the participant so that he/she has the most information to select the Training Program, considering academic preparation, occupational interests, skills, abilities, socioeconomic situation of the participant, duration, costs, and the execution of the Training Program.
3. The State List of Training Service Providers will encourage the participant to visit the different institutions that offer the training so that the institutions can guide him/her, determine if he/she is eligible, verify if he/she qualifies for financial aid, etc. The Career Planner will use the **Referral to Educational Institutions for Individual Training Accounts (ITA Account)** form.
4. If more than one institution offers the same training program, the interested participant should be referred to **all** the institutions offering the training so that he/she can compare the different alternatives and have all the available information at his/her disposal before making the decision of which institution to select.
5. The participant will sign a certification from the institution he/she selected (the course and the institution). **Institution Certification Form (Annex II)**.
6. After selecting the Institution of his/her choice, the participant will submit a document issued by the Institution, specifying:
 - i. If he/she qualifies for training based on the Institution's requirements.
 - ii. The duration of the training program is in months and days.
 - iii. Breakdown of training costs such as tuition, materials, books,
 - iv. Financial assistance from the Institution for which he/she qualifies.
 - v. Start date of the Training Program.
 - vi. The Institution must complete the Information Request Form to Evaluate Training Services Individual Accounts (ITA's).
 - vii. Any other information the Institution deems pertinent.
7. The Career Planner will evaluate whether the training costs equal those authorized on the State List of Training Service Providers. As evidence, Career Planners will include a copy of the page on which the selected Training Program is listed.
8. After evaluating the documentation received, the Career Planner will complete the application using the **Request for Services form (Attachment IV)** and including the evidence sent by the Educational Institution.
9. In addition, it will include the following, as applicable:
 - a. Copy of transcript of credits and/or high school diploma or its equivalent.
 - b. Interpretation of Interest Tests.
 - c. In cases where the profession requires licensure to practice, consideration will be given to participants who meet the minimum requirements to be eligible to take the revalidation examinations. To this end, the eligible participants must present evidence of a doping test and certifications of no debts with the Department of Treasury, Department of Transportation and Public Works, ASUME, and the Department of Public Works.
10. The Career Planner sends the application to the Career Planner Supervisor, who will verify that the ITA meets the requirements for authorization. In addition, he/she will verify

the participant's file to endorse the participant's eligibility. In the case of the Las Marías Affiliated Office, the Manager will directly perform the functions of the Career Planning Supervisor. The Career Planning Supervisor and/or Satellite Office Manager will complete and sign the Supervisor's Verification/Certification (Participant Eligibility) (See Attachment VI).

11. The Career Planning Supervisor will refer it to the Finance Office, which will certify the availability of funds. After the funds are certified as available, the Career Planning Supervisor will refer them to the Program Coordinator, who will register the ITA and assign the ITA number, and to the Contracting Officer, who will proceed to prepare an individual ITA contract.
12. The Program Officer will follow up with the participant and the Educational Institution to ensure compliance with the contract's terms and conditions. The officer will manage the invoicing according to the fund's article and contract payment modes. In addition, the Officer will process the participants' time sheets.
13. The Career Planner will be responsible for continuing to provide services to the participant so that he/she is aware of his/her adjustment, achievement, conduct, attendance, punctuality, and motivation. He/she will coordinate and refer to other services and programs, including CGU-AJC partners. As part of the service, the career planner will visit the locations where the participant is receiving services and make the necessary arrangements to assist the participant in completing the activity satisfactorily.

VI. APPROVAL

Approved in Mayagüez, Puerto Rico as of August 20, 2019.

Hilda R. Renovaes Cruz
Directora Ejecutiva

José A. Justiniano Rodríguez
Local Board President

CERTIFICATE OF TRANSLATOR

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In Isabela, Puerto Rico, June 30, 2024

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