



LOCAL AREA  
LABOR DEVELOPMENT  
**MAYAGUEZ/LAS MARIAS**

## American Job Center

### Procedure for the Granting of Individual Training Accounts

#### I. INTRODUCTION:

The training activities, for eligible participants, are provided by Training Service Providers through the modality of Training Accounts (ITA'S). Flexibility is provided to the Local Boards in the management of these in what concerns to: duration, limit of funds to be allocated to each ITA, as well as the exceptions. These restrictions may not be used to set arbitrary limits on excluding eligible training service providers. ITA'S is an economic agreement 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 for its English acronym)

Sections 680.300; 680.310; 680. 320; 680,330; 680. 340; 681,550 of the Final Regulations of the WIOA Act.

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

Public Policy for the Grant of Individual Training Accounts (ITA'S) on October 27, 2016.

### **III. DEFINITIONS:**

- 1. Local Labor Development Board (Local Board):** Body created under Section 107 of the WIOA Act, which in coordination with the Boards of Mayors share the responsibility of establishing public policy in relation to the development of the workforce of the Local Area and of carrying out the functions and responsibilities established in the WIOA Act.
- 2. Mayagüez-Las Marías Local Labor Development Area:** - In accordance with section 106 (b) of the WIOA Act, it is a territorial delimitation that is established taking into consideration multiple criteria among which are the demand of the labor market and regional economic development. This is for the purpose of authorizing the allocation of Title 1-B funds.
- 3. Training Accounts (ITA'S):** Training activities, for eligible participants, are provided by Training Service Providers through the modality of Individual Training Accounts (ITA'S). The principal purpose of an ITA is to guarantee the empowerment conferred by law on eligible participants, in terms of the selection of the training program of their preference. The Training Program chosen by the participant must be included in the State List of Training Service Providers and will be in an in-demand occupation in the Mayagüez - Las Marías Local Area or another area to which the participant is available to relocate.
- 4. Career Planner and/or Case Manager (Career Planner):** The Career Planner offers individualized Career Services. Among them, they prepare the Individual Employment Plan together with the participant, taking into consideration, the skills, abilities, education, employment experience, and occupational interests of the

participant.

5. **State List of Training Service Providers:** list issued by the Labor Development Program (POL), upon recommendation of the Local Board, which includes the programs eligible to be considered for the granting of an ITA. The list contains program information such as the Service Provider offering, the municipality where it is located, credits, cost, and the provider's execution for that specific program.
6. **Training Program:** Post-secondary training offered by a service provider duly authorized by the Puerto Rico Board of Education to offer programs aimed at obtaining a university degree (Associate Degree or Baccalaureate) and/or a Vocational Technical Certificate. These programs must be in demand and only those included in the State List of Training Service Providers can be offered.
7. **Institution or Service Provider:** institution organized under the laws of the Commonwealth of Puerto Rico, authorized, and licensed by the Post Education Council of Puerto Rico to offer Training Programs and grant Academic Degrees (Associate Degree and Baccalaureate) and / or Vocational Technical Certificates.
8. **Participant:** individual that after receiving the Basic Career Services was determined eligible under the eligibility criteria of the programs of Youth, Adult and Displaced Workers.
9. **Support Services:** The WIOA Act establishes that the corresponding Support Services will be offered to the participants of the Adult, Displaced Worker, and Youth Programs who:
  - Are participating in the activities authorized in the Law and
  - They are unable to obtain services through other programs that offer them.

These include, but are not limited to, the following: liaison to community services,

transportation assistance, child and dependent care, accommodation, needed related payment (NRP), educational testing, reasonable accommodation for participants with disabilities, referral to health services, uniforms or other work-appropriate clothing, work tools, including vision tools, and safety glasses.

#### **IV. GENERAL DISPOSITIONS:**

1. Through the Single Management System, youth, adults, and displaced workers will have access to the lists of eligible training providers, as well as the available programs training.

The lists include, among others, information related to costs and compliance.

2. Youth, adults, and displaced workers select the training provider from the State List of Training Service Providers, in consultation with the Career Planner.
3. Training providers and their programs will have to comply with the implementation standards established by the Local Board and the Labor Development Program (PDL), which means that they will have to demonstrate a successful execution to maintain their eligibility in the Provider Registry, for the purpose of receiving funds under WIOA.
4. The Local Board established as public policy that the duration of an ITA will not exceed one period of twenty-four (24) months, unless that the individual service strategy stipulates otherwise. The final approval of this extended service, prior to the start of this service, falls under the Local Board. The latter reserves the right to request additional information to that provided in the Service Strategy and to interview the Career Planner and the participant. The Local Board may approve up to one baccalaureate.
5. The Local Board established as public policy the cost of an ITA will not exceed \$10,000.00 (WIOA contribution) per participant. It is also established that in particular cases in which the cost is greater than the established limit, the final approval of the service corresponds to the Local Board under the same conditions as the previous paragraph. In addition, any possibility of combining funds with PELL Grants or other available grants must have been exhausted.

6. If a participant has completed two consecutive years to complete a bachillerato, an ITA may be awarded to complete the last two (2) years of studies. The Career Planner will consider the factors that did not allow the participant to complete the degree, as part of the evaluation process. The participant must present a transcript of credits and certificate of non-debt of the studies whose periods have not been subsidized by the WIOA Act. The progress report or transcript of credits will be decisive 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 in "default" or in debt with the federal government, may be considered to cover their studies only when they meet the requirements established in the previous paragraph. The client should present evidence that the Pell Grant was denied and the possibility of receiving alternate grants.
8. The combination of funds with any obligated partner, or other grants (such as federal, legislative, and institutional scholarships), must be evidenced to avoid double payment for the same services through the ITA .
9. In the event that a participant selects a Service Provider from another ALDL, it must be a training that is in demand in the Local Area of Labor Development Mayagüez-Las Marías or in a Local Area where the person is ready to relocate . The participants will need to demonstrate how they will pay the additional costs to the amount allocated to the ITA.
10. In addition to the costs of training, the participants will be provided with Support Services and Payment for Necessity (NRP), in accordance with their needs, the funds available and the participation or help that is obtained from other programs or System Partners.
11. Training services shall be available to employed or unemployed adults and displaced workers who:
  - a. After an interview, evaluation, and career planning:
    - i. It is unlikely or they cannot obtain or retain employment that

will lead them to be economically self-sufficient or to receive wages comparable or greater than those they receive, through the offering of career services.

- ii. In need of training services to obtain or retain employment that will lead them to be economically self-sufficient or to receive salary comparable to or higher than those received in his/her previous job.
- iii. The participant has the skills and qualifications to successfully participate in training services.
- iv. They select a training program that is directly linked to employment opportunities in the local area or economic region or in another area in which the participant is willing to relocate.
- v. They are unable to obtain economic assistance from other sources to pay for the cost of training.
- vi. If training services are offered with funds from the Adult Program, the priorities will be met, as set forth in Section 134 (c) (3) (E) of the WIOA Act.
- vii. The element of Development of Occupational Skills, corresponding to the Youth Program will be offered through the ITA'S modality. Young people out of school, aged 16 to 24, are eligible. The State List of Suppliers of Management Services will be used. The youth, together with the Career Planner, will select the training program.

## V. PROCEDURE

In order to promote that the participant is successful and can achieve his occupational goal, the Career Planner must follow the following steps:

1. Guide the participant over the different Training Programs available using the State List of Training Service Providers.
2. Will guide the participants, in order, that they have the greatest possible information to select the Training Program, considering academic preparation, occupational interests, skills, abilities, socio-economic situation of the participant, duration, costs, and execution of the Training Program.
3. The State List of Training Service Providers will lead the participants to visit the different institutions that offer the training so that the institutions can counsel them, determine if they are eligible and verify if they qualify for economic aid, etc. Will use the form: **Referral of Educational Institutions for Training Accounts (ITA Account)**.
4. In the event that there is more than one institution that offers the same training program, the interested participant must be referred **to all** the institutions that offer the training, so that he/she can compare the different alternatives and have at his/her disposal all the information available, before making the decision of which institution to select.
5. The participant will sign a certificate from the selected institution (the course and the institution). **Certification of the Institución Form . (Annex II)**.
6. After selecting the Institución of his preference, the participant will deliver a document issued by the Institución, which specifies:

- i. If qualifies for training based on the requirements of the institution.
  - ii. Duration of the Training Program in months and days.
  - iii. Breakdown of training costs such as: registration, materials, books, uniforms among others.
  - iv. Economic aid from the institution for which it 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 that the institution deems pertinent.
7. The Career Planner will evaluate whether the costs of training are equal to those authorized in the State List of Training Service Providers. As evidence of this, career planners will include a copy of the page on which the selected Training Program is included.
8. After evaluating the documentation received, the Career Planner will fill out the application using the **Service Request form {Annex IV}**, and including the evidence sent by the Educational Institute.
9. In addition, it shall include the following, as described:
  - a. Copy of credit transcript and/or high school diploma or its equivalent.

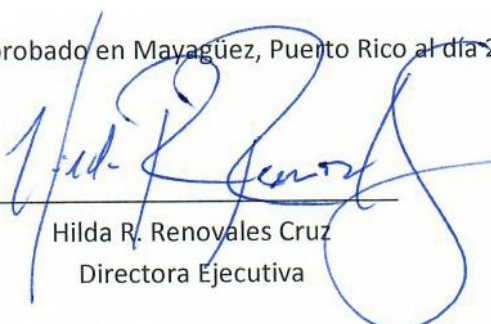


- b. Interpretation of Interests Test results
  - c. In the cases where the profession requires a license to be able to exercise, the participants who meet the minimum requirements to take the revalidation exams will be taken into consideration. For these purposes, eligible participants must present evidence of doping test, certifications of non-debts with the Treasury Department, the Department of Transportation, and Public Works, ASUME (child support), and Certificate of a Criminal Background.
10. The Career Planner sends the application to the Career Planner Supervisor who will verify if the ITA complies with the requirements for authorization. In addition, will verify the participant's file, to endorse the eligibility of the participant. In the cases of the Affiliated Office of Las Marías, the Manager will directly perform the functions of the Supervisor of Career Planners. The Career Planning Supervisor and/or Manager of the Satellite Office will fill out and sign the **Verification/Certification of the Supervisor (Participant Eligibility)**. (See **Anex VI.**)
  11. The Career Planner Supervisor will refer the participant to the Finance Office, who will certify the availability of funds. After the availability of funds is certified, the Career Planner Supervisor will refer it to the Program Coordinator who will register the ITA and assign an ITA number to the Contracting Officer who will proceed to prepare an individual ITA'S contract.
  12. The Program Officer will monitor the participant and the Educational Institute to ensure compliance with the terms and conditions of the contract and will manage the invoicing according to the article of funds and methods of payment of the contract. In addition, to process the participant's attendance sheets.

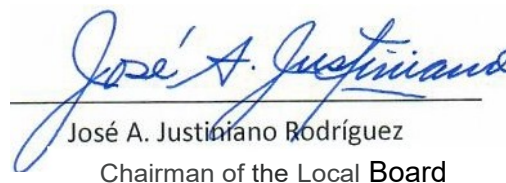
13. The Career Planner is responsible for continuing to offer services to the participant to monitor his adaptation, performance, conduct, attendance, punctuality, motivation, among others. He/She will coordinate and refer to other services and programs provided by the partners of the CGU-AJC. As part of the service, the career planner will visit the places where the participant is receiving services and execute the necessary due diligence to help the participant to complete the activity satisfactorily.

## VI. APROVAL

Aprobado en Mayagüez, Puerto Rico al día 2 August 0 , 2019



Hilda R. Renovales Cruz  
Directora Ejecutiva



José A. Justiniano Rodríguez  
Chairman of the Local Board