



**NOVEMBER 6, 2023**

**TO:** Western Piedmont Workforce Development Area WIOA Title I Service Providers

**SUBJECT:** Individual Training Account Scholarship Requirements, Expectations and Guidelines Policy

**EFFECTIVE DATE:** Immediately

**EXPIRATION DATE:** Indefinite

**CONTACT:** Workforce Development Program **Manager**

A handwritten signature in black ink, appearing to read 'C. Hamber'.

[Charity Patterson Hamber \(Nov 3, 2023 10:23 EDT\)](#)

Charity Patterson Hamber  
Workforce Development Director

## INDIVIDUAL TRAINING ACCOUNT REQUIREMENTS, EXPECTATIONS AND GUIDELINES POLICY

**PURPOSE:** To Transmit and explain the Western Piedmont Workforce Development Area (WPWDA) policy regarding Workforce Innovation and Opportunity Act (WIOA) Individual Training Account (ITA) for Adult, Dislocated Worker and Youth (herein referred to as NextGen) Title I participants (here in referred to as participants) with regard to ITA enrollment, participation, payment of tuition, expenses, dropping and adding training classes, interaction with career advisors, documentation to be provided to career advisors, employment and any subsequent WIOA participation. *To rescind WPWDA Individual Training Account Scholarship Requirements, Expectations & Guidelines policy statement dated April 11, 2022.*

**BACKGROUND:** In order to best utilize participant WIOA Title I scholarship funds in the WPWDA, this policy statement serves to compile ITA Scholarship Requirements, Expectations and Guidelines for participants with regard to enrollment, participation, payment of tuition, expenses, dropping and adding training classes, interaction with career advisors, documentation to be provided to career advisors, employment and any subsequent ITA Scholarship participation on one form to be signed by each new participant.

The policy is outlined as follows:

The goal of WIOA is employment. The expectation is that each participant's goal is to find a job related to their training area.

Full-time enrollment in training is expected unless the appropriate classes are not available or the participant's particular situation makes full-time attendance impossible.

Participants must adhere to the Federal Satisfactory Academic Progress Standards at the educational institution that they attend. These shall include both qualitative and quantitative measures. If a participant's GPA falls to, or below 2.0, for a semester, regardless of overall average, the Career Advisor will establish a method for closely tracking their progress, and conduct immediate follow up.

Specific Guidelines for the usage of ITA Scholarship funds related to tuition:

- a. May be used to pay tuition to repeat an "F" one time only.
- b. May not be used to pay tuition to repeat a "D".
- c. If a participant drops a funded class(s) without approval by the Career Advisor, funds may not be used to fund that class(s) again.

- d. If a participant drops a funded class(s) without approval by the Career Advisor and does not retake that specific class(s), funds will not be used to fund another class(s) (of similar number of hours) the next semester.
- e. During the drop/add period at the beginning of a semester, if a participant adds a class(s) without Career Advisor approval, funds will not be used to fund that class(s).
- f. May be used to sponsor one educational major only.
- g. Will only be used for courses required by the participant's curriculum or those deemed crucial in the development of the skills required for employment in their chosen field.
- h. If a participant changes majors without Career Advisor approval, funds will not be used to sponsor the new major.
- i. May be used to pay for third party certification exams. Funds can pay for one additional take if participant is not successful the first time.

WIOA participants are required to contact their Career Advisor monthly throughout their ITA Scholarship participation. This contact must be in person unless it is not feasible at which point it can be a virtual meeting. Virtual meetings must be documented in nworks.gov by assigning the appropriate activity code and entering a case note. Career advisors will be available at other times through the month as needed.

Participants must submit the WIOA Title I Training Scholarship Attendance Sheet (Attachment C) monthly. Participants must submit a copy of their grade screen showing assignments submitted and graded as verification for online classes for the time period stated on their WIOA Title I Training Scholarship Attendance Sheet (Attachment C). The WIOA Title I Training Scholarship Attendance Sheet (Attachment C) will be used as verification for support assistance if participant is eligible. (See the [Support Services Policy](#) located at <https://www.wpcog.org/policy-statements>). Participants are to be reminded if they knowingly falsify or withhold information to qualify for childcare or transportation support assistance for which they are not entitled, services will be denied and legal action will be taken to recoup WIOA federal funds.

Participants must provide grades to the Career Advisor each semester or upon completion of a course for short-term training. A copy of the certificate, diploma or degree must be provided to the Career Advisor at the end of training.

Should circumstances arise that prevent a participant from attending training, the participant must notify their Career Advisor immediately. If a

participant drops out of school without notifying the Career Advisor, they may not be eligible for future WIOA scholarships.

Once a participant is exited from WIOA, they must wait three years before they may reapply for WIOA Title I financial assistance in the WPWDA.

**PROCEDURE:**

Individuals who are potentially eligible for a Pell Grant must apply. WIOA Title I Service Providers will coordinate funds available with the financial aid office of the training provider. The Pell Grant is an entitlement and the student is eligible to receive it regardless of receiving funds from external sources. **To determine the needs of the participant, a Financial Award Analysis (FAA) or alternate form containing the same information should be completed. The use of Pell Funds and WIOA is dependent on the availability of WIOA funds and is outlined in the Workforce Innovation and Opportunity Act Funds and Pell Grants Policy and should be referenced when determining how both funding sources should be used to best serve the participant.**

The Career Advisor is to complete a FAA (see WIOA Funds and Pell Grants Policy - Attachment A located at <https://www.wpcog.org/policy-statements>).

The Career Advisor is to coordinate training funds available and make funding arrangements with other NCWorks Career Center partners such as Department of Social Services, Vocational Rehabilitation, and other potential funding entities before WIOA funds are used.

The ITA Scholarship Requirements, Expectations and Guidelines (Attachment A) is to be explained to, initialed, and signed by each new ITA Scholarship participant. This form is to be part of the intake process for all new participants. The original form, once reviewed and signed, is to be uploaded in the participant's file in ncworks.gov. A copy should be provided to the participant.

The WIOA Title I Training Scholarship Attendance Sheet (Attachment B) is to be completed in ink by the instructor(s), signed and submitted to the Career Advisor monthly. The original form once reviewed and signed is to be uploaded in the participant's file in ncworks.gov.

## WESTERN PIEDMONT WORKFORCE DEVELOPMENT AREA ITA SCHOLARSHIP REQUIREMENTS/EXPECTATIONS/GUIDELINES

Participation in the Workforce Innovation and Opportunity Act (WIOA) is not an entitlement. Timely and satisfactory progress toward the achievement of the training goal will be monitored to determine if continued enrollment is warranted. Please indicate your understanding and willingness to comply with each item by initialing in the space provided.

**Participant  
Initials**

1. Participants who are potentially eligible for a Pell Grant must apply. If WIOA funds are approved and participant is subsequently awarded a Pell Grant, the Pell Grant should be utilized to cover additional training and education-related expenses to include dependent care and transportation, and other appropriate costs as determined in the completed Financial Award Analysis (FAA). WIOA Title I funds are to be applied toward tuition, books, fees, and tools of trade. \_\_\_\_\_
2. The goal of WIOA Title I is employment. The expectation is that each participant's goal is to find a job related to their training area. \_\_\_\_\_
3. Full-time enrollment in school is expected unless the appropriate classes are not available, or the participant's particular situation makes full-time attendance impossible. \_\_\_\_\_
4. Participants must adhere to the Federal Satisfactory Academic Progress Standards at the educational institution they attend. These shall include both qualitative and quantitative measures. If a participant's GPA falls to or below 2.0 for a semester, regardless of overall average, the Career Advisor will establish a method for closely tracking their progress. \_\_\_\_\_
5. Specific Guidelines for usage of ITA Scholarship funds related to tuition:
  - a. May be used to pay tuition to repeat an "F" one time only. \_\_\_\_\_
  - b. May not be used to pay tuition to repeat a "D". \_\_\_\_\_
  - c. If a participant drops a funded class(s) without approval by the Career Advisor, funds may not be used to fund that class(s) again. \_\_\_\_\_
  - d. If a participant drops a funded class(s) without approval by the Career Advisor and does not retake that specific class(s), funds will not be used to fund another class(s) (of similar number of hours) the next semester. \_\_\_\_\_
  - e. During the drop/add period at the beginning of a semester, if a participant adds a class(s) without Career Advisor approval, funds will not be used to fund that class(s). \_\_\_\_\_
  - f. May be used to sponsor one educational major only. \_\_\_\_\_

- g. Will only be used for courses required by the participant’s curriculum or those deemed crucial in the development of the skills required for employment in their chosen field. \_\_\_\_\_
  - h. If a participant changes majors without Career Advisor’s approval, funds will not be used to sponsor the new major. \_\_\_\_\_
  - i. May be used to pay for third party certification exams. Funds can pay for one additional retake if participant is not successful the first time. \_\_\_\_\_
6. Participants are required to contact their Career Advisor monthly throughout their ITA Scholarship participation. This contact must be in person unless it is not feasible at which point it can be a virtual meeting. Career Advisors will be available at other times throughout the month as needed. \_\_\_\_\_
  7. Participants must submit monthly their completed and signed WIOA Title I Training Scholarship Attendance Sheet (Attachment B). \_\_\_\_\_
  8. Participants must submit a copy of their grade screen showing assignments submitted and graded as verification for online classes for the time period stated on their WIOA Title I Training Scholarship Attendance Sheet (Attachment B). \_\_\_\_\_
  9. Participants must provide grades to the Career Advisor each semester or upon completion of a course for short-term training. A copy of the certificate, diploma or degree must be provided to the Career Advisor at the end of training. \_\_\_\_\_
  10. Should circumstances arise that prevent a participant from attending training, the participant must notify their Career Advisor immediately. If a participant drops out of school without notifying the Career Advisor, they will not be eligible for future WIOA sponsorship. \_\_\_\_\_
  11. Once a participant is exited from WIOA they must wait three years before they may reapply for WIOA Title I financial assistance in the Western Piedmont Workforce Development Area. \_\_\_\_\_

**I have read and understand the requirements/expectations/guidelines for WIOA as listed above and realize that failure to comply will jeopardize my WIOA participation.**

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
Date

**WESTERN PIEDMONT WORKFORCE DEVELOPMENT AREA  
WIOA TITLE I TRAINING SCHOLARSHIP ATTENDANCE SHEET**

Career Center: \_\_\_\_\_

Month/Year: \_\_\_\_\_

Participant Name: \_\_\_\_\_

Training Location: \_\_\_\_\_

**School Official:** This student is enrolled in the Workforce Innovation and Opportunity Act (WIOA) approved training and is receiving financial aid.

WIOA policy mandates that classroom attendance be verified. Please complete the Attendance Record below in ink using the following codes:

√ = Attended Class    A = Absent from Class    NC = No Class Scheduled

**Your signature in the far right column indicates the attendance information is correct to the best of your knowledge and serves as verification for payment purposes.**

**Attendance Record**

Course Title/ Clinical Site	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Certification Signature & Date				

**Online Classes:** Participant needs to check the days they were in attendance and submit a copy of their grade screen showing assignments submitted and graded as verification for the time period stated on the attendance sheet.

**I certify the above attendance is correct and understand that it may be verified. I understand if I knowingly falsify or withhold information to qualify for transportation and/or childcare assistance for which I am not entitled, services will be denied and legal action will be taken to recoup WIOA federal funds. For youth, I understand a gas card will be issued for transportation assistance and it is my responsibility to work out gas card reimbursement if a third party driver provides transportation for me. I understand transportation and/or childcare assistance are based on funding availability.**

Participant's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**WIOA Title I Staff to Complete**

Training Round Trip Miles: \_\_\_\_\_

Total Training Round Trip Miles: \_\_\_\_\_

Total Training & Clinical Miles: \_\_\_\_\_

Clinical Round Trip Miles: \_\_\_\_\_

Total Clinical Round Trip Miles: \_\_\_\_\_

Gas Card Amount: \_\_\_\_\_

Support Services Received:  Transportation

Childcare

Program:  Adult

DW

Youth

**This document serves as authorization for transportation and/or childcare assistance. I have made computations based on the information provided by the participant, Google Maps and the training provider which appears to be an accurate representation of the participant's participation during the period.**

Career Advisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_






# ITA\_Scholarship\_Requirements\_Policy\_Final\_11062023

Final Audit Report

2023-11-03

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