

Northwest Workforce Council

POLICY AND PROCEDURE DIRECTIVES

EFFECTIVE DATE: July 31, 2006

SUBJECT: ITA Plan Authorization and Revision Process

REFERENCE: WIA 01-30 Rev. 1

New Individual Training Account Plan Authorization: Begin the process by having three signed originals of the Plan (one copy each marked “Fiscal,” “Registration,” and “Bookstore” in the lower left hand corner). Mail **all** three copies with a transmittal cover letter to the appropriate school. Keep a copy for your working file.

After you mail all three signed ITA Plans with original signatures to the school:

- Each school has a unique internal process for establishing student accounts.
- School will mail the “Fiscal” copy back to the NWC fiscal office.

Next the NWC fiscal office will:

- Receive the “Fiscal” form returned by the school.
- Establish an ITA plan requisition into the accounting system.
- Prints the requisition and staples it to a copy of the ITA.
- Two forms are returned to the originating coordinator for working file.
- Fiscal keeps originals of ITA Plan in participant’s central file.
- Fiscal forwards participant statements to coordinator quarterly.

Revisions to ITA Plan: The key to revising an Individual Training Account Plan is to correctly identify and revise all items that are changing. To begin, use the “Individual Training Account Plan Authorization” form, mark the “Revision” box and change those items that you are revising.

For example, if you are adjusting the end date of training, enter the new “End Date” and revise the “Quarters Attending” accordingly. The participant does not need to sign the revision.

Northwest Workforce Development Council				
Individual Training Account Plan				
<input type="checkbox"/> New Contract	<input checked="" type="checkbox"/> Revision			
1. Name (Last, First, Middle Initial)			2. County:	
3. Social Security #:		4. Fund Source:		
5. Program / Course Title:			ONET Code: http://online.onetcenter.org/	
6. Training Facility:				
7. Dates of Training:				
	Start Date (xx/xx/xx)	End Date (xx/xx/xx)		
Quarters Attending	Fall 20	Winter 20	Spring 20	Summer 20
	Fall 20	Winter 20	Spring 20	Summer 20

Use the comment area of the form to describe the reason for the change.

To adjust line items costs (add or decrease funds) use the following process:

- Mark the “Revision” box
- Leave the 1st and 2nd Year Cost as they were originally submitted
- Enter new costs in “Revision Cost”
 - To increase Plan costs enter new dollar amount.
 - To decrease Plan costs enter a negative dollar amount.

Use the comment box to detail the reason for the change.

In the example below, \$200 is added to tuition, \$200 to books and \$100 to Support. The revised form now includes item #6 for training related Supportive Services On-Going (childcare & mileage).

8. Budget Information				Direct Student Training Costs	
				1st & 2nd Year Cost	Revision Cost
1.	Tuition & Fees (including lab, parking, graduation, registration)	\$1,500	\$200		
2.	Books / Supplies (Purchased at Training Facility)	\$500	\$200		
3.	Tools (Describe below)	\$0	\$0		
4.	Uniforms, Specialized Supplies (Describe below)	\$500	\$0		
5.	Other (Immunizations, License & Test Fees, etc.)	\$0	\$0		
Total Annual Training Costs		\$2,500	\$400		
6.	Supportive Services On-Going (childcare & mileage)	\$400	\$100		
				Total NWDC Costs	\$3,400

A Revised Plan will have three signed originals (one copy each marked “Fiscal,” “Registration,” and “Bookstore” in the lower left hand corner). The participant does not need to sign. Mail **all** three copies with a “Revision Letter” to the appropriate school. Keep a copy for your working file.

The process for returning the revisions is the same as outlined above for a new plan.

If you find the need to “freeze” a participant’s account, please use the same Revision process but in addition, contact the school representative above to expedite the process.

We appreciate your comments on this process in order to make improvements. Please email those comments to Dan Vogel, dvogel@nwpic.bellingham.wa.us.