

**INDIVIDUAL TRAINING ACCOUNT (ITA) & APPRENTICESHIP TRAINING ACCOUNT (ATA)
POLICIES AND PROCEDURES**

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I. PURPOSE

This policy communicates the San Diego Workforce Partnership's eligibility and documentation requirements for authorizing WIOA Title I funded training through Individual Training Accounts (ITAs) and Apprenticeship Training Accounts (ATAs) for individuals enrolled in WIOA Title I Adult and Dislocated Worker programs, and out-of-school youth ages 16-24 enrolled in WIOA Title I Youth (Young Adult) programs.

This policy aligns with current Department of Labor (DOL) regulations and Employment Development Department (EDD) policies, and with the Workforce Partnership's ITA and ATA documentation requirements.

II. BACKGROUND

Individual Training Account (ITA) and Apprenticeship Training Account (ATA) are training services that are available to those participants who are unable to find employment or are looking to upskill. Need and ability to benefit from WIOA funds must be established and the participant must have the skills and qualifications to successfully complete the training program. An individual's need for training shall be determined through their individual employment plan (IEP) and career assessment results.

A. Individual Training Account

The ITA is a payment agreement established on behalf of a participant with a training provider. WIOA title I adult and dislocated workers purchase training services from State eligible training providers they select in consultation with the Career Navigator, which includes discussion of program quality and performance information on the available eligible training providers.

B. Apprenticeship Training Account

A Registered Apprenticeship is industry-driven training where employers determine the skills that are essential to sustain a quality workforce. Similar to ITA's or On-the-Job Trainings (OJT)'s, Registered Apprenticeships are intended for participants who need training for in-demand occupations throughout San Diego County. However, unlike ITA's and OJT's, participants enrolled in Registered Apprenticeships earn wages while attending training. Following an "Earn and Learn" model, apprenticeship training includes both classroom and OJT Training.

Through ATA's, apprentices are hired as employees within the training field and earn wages once accepted into the program. The length of the apprenticeship training may vary by occupation but at minimum an apprentice is required to attend a minimum of 144 hours per year of classroom training and obtain 2,000 hours of on-the-job training. Additional classroom training hours are accrued on a six-month basis with a requirement of 72 hours per period.

1. ATA Program Admission

A registered apprenticeship's program sponsor must accept a participant prior to the execution of an ATA. Sponsors are employers or groups of employers, who identify the minimum qualifications applicants must meet in order to apply for their apprenticeship program. Minimum qualifications and credentials to apply may include education, ability to physically perform the essential functions of the occupation and proof of age. Additional qualification standards, such as interviews, school grades and previous work experience may be required.

Through the apprenticeship agreement, an apprentice receives supervised, structured on-the-job training combined with related technical classroom instruction that provides the knowledge

required to perform at a highly skilled level. At the end of the apprenticeship, all apprentices must receive an industry-recognized credential. Some apprenticeship programs offer interim credentials as apprentices achieve important milestones during their apprenticeship.

II. ITA/ATA POLICY & PROCEDERES

WIOA Title I service providers must comply with this policy and with the ITA/ATA and related training documentation requirements.

A. Participant Eligibility

Individuals enrolled in WIOA Title I Adult and Dislocated Worker programs, and out-of-school youth ages 16-24 enrolled in WIOA Title I Youth (Young Adult) programs may be eligible for WIOA Title I funded training through an ITA when the following criteria are met:

- i. Assessment results demonstrate the individual:
 1. Is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone,
 2. Is in need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment, and
 3. Has the skills and qualifications to participate successfully in training services.
- ii. An Individual Employment Plan (IEP) or Individual Service Strategy (ISS) is created in collaboration with the WIOA Title I service provider that identifies the selected training program. The selected training program must align with the individual's documented career goals. The IEP or ISS must include the anticipated and actual
- iii. start dates of training, training completion date, and credential earned.

The individual is determined ineligible for, or there is an absence of, grant assistance from other sources such as Pell grants to pay the costs of training or is determined to be in need of additional assistance beyond available grant resources from other sources in order to complete their training goals.
- iv. The selected training programs are:
 1. Included on the Eligible Training Provider List (ETPL), and
 2. Directly linked to an in-demand industry sector or occupation or sectors that have a high potential of sustained demand or growth in the local area or in the planning region or in another area in which the participant is willing to travel or relocate, and
- v. The individual maintains satisfactory progress/grades throughout the training program.

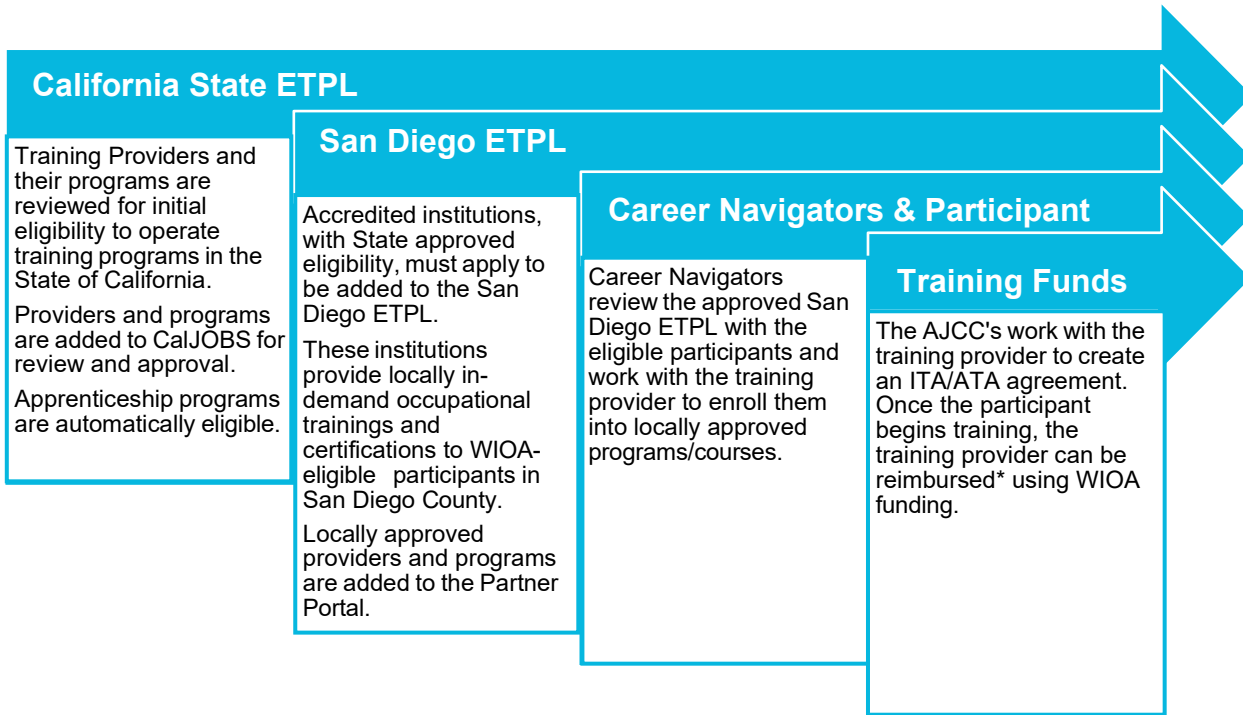
B. Training Provider Eligibility

Participants may access training services through Training Providers who have met eligibility requirements set by the state in order to be listed on the state managed Eligible Training Provider List (ETPL). As the local Workforce Development Board (WDB), San Diego has additional eligibility requirements to ensure the trainings provided are in occupations with regional growth projections and locally sustainable wages, as well as meeting the needs of the region's employers.

The ITA & ETPL Policies and Procedures applies to Training Providers that currently have or are interested in listing programs on the San Diego ETPL to receive Workforce Investment and Opportunity Act (WIOA) funding. Approved Training Providers are subrecipients of San Diego Workforce Partnership (Workforce Partnership).

Please note that other Workforce Development Boards may have ETPL policies which vary based on their needs. A Training Provider interested in serving multiple Workforce Development Boards must review and comply with the ETPL policies of each area where they wish to operate. SDWP does not review or approve Training Providers to operate in areas

outside of San Diego. Refer to Attachment – ETPL Policies and Procedures for more information.



C. Training Reimbursement

The ITA and ATA cap shall not exceed \$7,000, or the actual cost of the program, **whichever is less.**

Under WIOA: Title I (Adult and DW), ITA's and ATA's will be used when training at no cost cannot be found or provided in a timely manner. Participants must meet the financial needs requirement of being unable to obtain grant assistance from other sources to pay partial or full costs of such training.

All other training options and funding sources, including ETPL funds shall be exhausted prior to utilizing WIOA: Title I training funds. Career Center staff shall monitor and track each participant's financial aid. ITA's will provide participants the maximum participant choice in services and in training schools, and the flexibility needed to obtain training in demand occupations in the changing economy of the San Diego Region. The Training Services Team is accountable for developing and managing an ITA/ATA process that provides training opportunities to participants who express an interest in, and need for, training opportunities. The Career Navigators must show evidence of exhausting all other funding sources through documentation in CalJOBS.

Supportive Services can be used on an approved training if the training does not include all associated costs and/or training pre-requisites for the participant to be successful in training. Refer to **Chapter 4, Part 1: WIOA: Title I Adult Program Activities.**

D. Training Policies

Please refer to **Chapter 4. Part 3: WIOA TITLE I Training Services** from more detailed policy around consecutive training approvals, unsuccessful training completions, training extension approvals and repetition of courses.

E. Training Research

1. Career Assessment and Training Research

The Career Navigator shall guide the participant with conducting the following prior to approving an ITA or an ATA:

Career Assessment and Training Research Process

1. Review **ATTACHMENT - CUSTOMER TRAINING CONTRACT** with the participant and upload the signed contract to CalJOBS activity code 202 (Career Guidance/Planning).
2. The participant shall create a profile on [Career Coach](#) and complete the career assessment to explore local careers and educational programs that match their assessment results and interests. The Career Navigator shall attach the participants results to CalJOBS activity code 204 (Interest and Aptitude Testing).
3. Complete **ATTACHMENT - ITA/ATA RESEARCH FORM**.
 - a. The participant must complete the ITA/ATA Research Form by contacting the training provider. The training provider is not to complete the form on behalf of the participant. The questions included in the form are meant to guide the participant's research.
 - i. The participant must consider the program cost, transportation, classroom setting (in- person/online), and if applicable, necessary accommodations for persons with disabilities.
 - ii. If a training is online, the participant must have consistent access to internet, a computer, and any necessary equipment to complete the course.
 - b. The participant should also provide 3 possible start/end dates.
 - i. The first listed start date must be at least two weeks from the time the form is sent to their Career Navigator.
 - c. Career Navigator must ensure that the participant has signed the ITA/ATA Research Form prior to sending it over. The Career Navigator is to write the date the form was reviewed and upload the form into CalJOBS.
4. The Career Navigator will enter one of the following standalone case notes in CalJOBS:
 - a. If the participant is completing an ITA or ATA, please enter the following:

Subject line: Career Assessment and Training Research

Content: The participant completed Career Coach Assessment and researched [**Name of Training Program(s)**] using information on the approved San Diego Workforce Partnership Funded Trainings List. The participant chose [**Name of chosen Training Provider**] and has chosen the training program. [**List specific details regarding the participant's choice and how it connects to their assessment results**]. The participant has completed all pre-requisites and requirements for this training course, including [**List any prerequisites and requirements**] and is eligible to begin.

- b. If the participant is completing both an ATA and OJT, please enter the following:

Subject line: Assessment and Research Waived

Content: The participant's assessment and research has been waived. [**Name of chosen Training Provider**] has assessed individual to ensure participant is a good fit for the apprenticeship training program.

F. Generating the ITA/ATA Agreement

1. Training Agreement Number

The following shall be used to assign Training Agreement numbers:

- Region Code (1 digit) + Program Code (1 digit) + WIOA App ID (8 digits) + Program ID (5 digits)

Region Codes	Program Codes
E - East	A - Adult
M - Metro	D - Dislocated Worker
N - North	
S - South	

- Program ID numbers for approved programs will be listed on the published ETPL on the Partner Portal, under [San Diego ETPL Programs](#).
- If a Program ID number is less than 5 digits, the Career Navigator shall use zeroes (0) in front of the number
- The Program ID number will be entered on the Activity Code in CalJOBS and must match the Training Agreement

Example Agreement Number: MA-12345678-00985

2. Request For Training Funds

The Career Navigator (CN) shall be responsible for the following training request documentation and data entry processes. Approved training requests will require the appropriate training activity code be entered into CalJOBS based on the selection from the training research, generation of the CalJOBS Activity Enrollment Form (Training Agreement), obtaining Training Funds Coordinator (TFC) initial review approval, obtaining all the necessary signatures on the Training Agreement, uploading documentation to CalJOBS and requesting funds approval from TFC no less than seven (7) business days prior to the start date of training.

Request for Training Approval

a. CalJOBS Activity Code Data Entry

The CN is responsible for the following:

- Adding the appropriate training activity code in CalJOBS
 - ITA – 300 (Individual Training Accounts)
 - ATA – 325 (Apprenticeship Training Accounts)
- Enter the required (*) fields on each of the following tabs:
 - General Information
 - Service Provider
 - Enrollment Cost
- On the **General Information** tab:
 - Enter Projected Begin Date
 - Enter Projected End Date
 - **DO NOT** enter the Actual Begin Date
 - In the Comments field textbox include:
 - Training Agreement Number (see below)

- Total Program Cost
 - Based on the current cost listed on the ETPL
 - Enter decimal place holders if necessary
- Financial Aid (if applicable):
 - Enter the amount of any financial aid received
 - Enter \$0.00 if no financial aid was obtained
- Student Cost: (if applicable)
 - Enter any additional cost to the participant greater than the training amount and any financial aid received if applicable
 - Enter \$0.00 if there is no additional student cost
- Include Priority Sector

Example:

MA-12345678-00123 Total Program Cost: \$7,000.00 Financial Aid: \$1,000.00 Student Cost: \$0.00 Sector: Healthcare
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- On the **Service Provider** tab:
 - Use the published ETPL in the Partner Portal to ensure the correct Training Provider, Training Program, and Standard Occupational Code (SOC) is selected
- On the **Enrollment Cost** tab:
 - Zero all itemized fields (ex. Books, Tuition, etc.)
 - Enter the amount into the **Other Costs** field.
 - Compare the Program Cost to the Max Training Cost and use the minimum amount
- Review CalJOBS Data Entry
 - Generate the Activity Enrollment Form (Training Agreement) PDF
 - Review the Training Agreement for accuracy

b. CalJOBS Activity Enrollment Form (Training Agreement)

The CN is responsible for the following:

- Generate the Activity Enrollment Form (Training Agreement) PDF
 - Review the Training Agreement for errors
 - Use the Training Agreement CalJOBS Data Entry Checklist
- Obtain signatures after data is verified as accurate
 - Applicant Signature Line
 - Signed by the participant
 - Provider Staff Signature Line
 - Signed by the training provider program, please use Staff Contact under San Diego ETPL Programs list

NOTE: If the participant is entering an ATA/OJT agreement combination please send over the ATA to the assigned Business Services Representative to obtain the signatures.

- Upload signed Training Agreement to CalJOBS
- Case note to include:
 - Subject Line:
Activity Code – Activity Code Description + “Request for Training”
Example: “300 – Occupational Skills Training (Approved ETPL Provider) Request for Training”
- Case note text:
“Training Agreement signed and uploaded to CalJOBS. Awaiting training


approval.”

- Notify TFC by emailing provider_trainings@workforce.org
 - Subject Line: Signed ITA Agreement – Participants First & Last Name
 - Email Body: Participant's STATE ID# [Full Number]
 - Attach the signed training agreement to the email

NOTE: No changes can be made to a signed Training Agreement. If there is an error found on the signed Training Agreement, a new Training Agreement MUST BE created, and new signatures obtained after corrections have been made.

1. Training Agreement Review and Approval

The TFC is responsible for the following:

- Review Training Agreement
 - Verify the data entry on the agreement is accurate. Use the Partner Portal to confirm training details.
 - Verify Signatures
- Navigate to the 300/325 Activity Code
 - Select the, select the wizard icon  to enter the activity code in edit mode.
 - Verify information entered into the **General Information, Service Provider, Enrollment Cost** tabs mirrors what is documented on the Training Agreement.

The Training Agreement is considered approved once the budget has been added to the Training Agreement in CalJOBS.

- Add the Enrollment Budget
 - Select the link [\[Click Here to Select a Budget\]](#)
 - Select the corresponding budget.
- Under **Action** section of **Budget** table, select the [\[Edit\]](#) link and type in funded amount
 - Select **Next** to save and exit.

Edit Funded Cost
Change or remove the funded cost amount for this record.

Funded Cost Allocation

Budget Amount:	\$267,320.00
Available to Allocate:	\$27,303.00
Available to Obligate:	\$27,303.00

*Funded Amount:

[Save](#) [Cancel](#) [Delete](#)

- The TFC shall approve the agreement by assigning appropriate budget to training in CalJOBS within 2-4 business days of receipt of the complete and accurate agreement.
- The CN shall notify the participant and training provider of the approval via e-mail and attach the Training Agreement (CalJOBS Activity Enrollment Summary).

NOTE: In the event the training activity code data entry and activity enrollment print out has missing information or incorrect information, the TFC will notify the CN via email. The Training Agreement will not be approved until the necessary modifications are completed. Any changes to the signed Training Agreement will require a new form to be generated and new signatures obtained from the participant and the training provider. Any changes to the training provider and/or program, office location, or customer group will require the submission of a Data Change Request (DCR). The date of the signatures will be the driving date to determine the agreement

date.

G. Training Enrollment Verification

1. Activity Enrollment Summary (Training Agreement)

The Career Navigator shall confirm that the participant started training with the training provider and participant by documenting confirmation and entering the date in Actual Begin Date field of the open 300/325 activity code after the participant has passed the training provider 'drop-date.' An attached case note will also be added to the activity code indicating the participant has begun training. This is not a stand-alone case note.

2. Enrollment Confirmation Case Note

The following sample case note shall be used for this specific case note:

Content: On **[Date]** I called **[Name of Training Provider]** to verify that **[Name of Participant]** started training on **[Date]**. I spoke with **[Name of Contact]** and **[Contact's Title]**. **[Name of Contact]** verified that **[Name of Participant]** attended training program on **[*intended start date*]**.

3. Projected Start Date

If the participant's actual start date is different than the "projected start date" noted on the signed Training Agreement, do not make any changes to the projected start date, instead an additional attached case note should be entered to document the change of start date and the reason for the change. However, if the start dates changes more than twice then a new ITA agreement will need to be generated and resent for approval.

4. Voucher Notification

The CN shall notify the TFC via the provider_training@workforce.org email that the participant began training on the intended start date. The TFC can initiate the voucher processing steps below.

H. Voucher

A voucher in CalJOBS will function as a request for payment to the training provider. The TFC must enter a voucher for training in CalJOBS within seven (7) calendar days after the confirmation of the training start date.

Voucher Processing

1. Voucher Processing

Vouchers are submitted through CalJOBS in the Budget Planning tab of the training activity code and is to be completed by the TFC.

- Navigate to training activity code in participant program profile
- Select the **W** wizard icon to enter the activity code in edit mode

A. In the **Budget Planning** tab

- Select the link [Add a Voucher]
- Confirm the billing address
 - If the billing address is incorrect, please email inquiries@workforce.org
- Reference No. field
 - Enter the Training Agreement Number
- Date field
 - Enter the date of the voucher request
- Cost Details Section

- Enter the total funded amount for the training in the Other Costs field.
- B. Enter attached case note to training activity code
 - Case note to include:
 - **Example:**

Subject line: 300 – Occupational Skills Training (Approved ETPL Provider)
Voucher
Content: Voucher entered and approved.

- C. Voucher Approval
 - Select **Programs** tab
 - Scroll to **Title I – Workforce WIOA**
 - Select the plus sign icon **W** to expand the **Activities/Enrollments/Services** link.
 - Select the 300/325 Code and select the wizard icon **W** to enter the activity code in edit mode.
 - Select **Budget Planning** tab
 - Select the link [Add a Voucher]
 - Verify data in **Manage Voucher** field
 - Verify required fields and billing address
 - Select **Approved**
 - Scroll to bottom and select **Save**

***Once approved, the voucher status will be updated to “Approved.”**

2. ITA Funding Verification

- A. Navigate to the **Budget Planning** tab in CalJOBS to determine when an ITA agreement has been approved for funding, voucher added, or payment processed.
 - Approved ITA: Total Funded Costs
 - Voucher Added: Total Obligation
 - Voucher Paid: Total Paid Obligation

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning
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Budget Plan Information

Enrollment Summary: Enrollment ID: 12936731
 Username: MARAJADE933
 WIOA Application ID: 21500662
 Activity Code: 300 - Occupational Skills Training (Approved ETPL Provider)
 Activity Dates: 4/3/2023 - 6/30/2024

Total Funded Costs:	\$7,000.00
Total Obligations:	\$7,000.00
Total Paid Obligations:	\$7,000.00
Total Outstanding Obligations:	\$0.00
Total Funded Costs to be Obligated:	\$0.00

[\[-\] Show Filter Criteria \(Showing all records\)](#)

SDWP Adult PDT Funds : SDWP FY 2023 (7/1/2022 - 6/30/2023)

Budget Location: San Diego Workforce Partnership, Inc. [LWIA/Region]

Funded Amount: \$7,000.00	Obligated Amount: \$7,000.00	Current Balance: \$0.00
Total Payments: \$7,000.00	Total Refunds: \$0.00	Total Paid: \$7,000.00

[\[Add a Voucher \]](#)

- B. CalJOBS Payment Report
Workforce Partnership Finance Department shall run the CalJOBS Payment Report weekly for

approved vouchers. Payment will be mailed directly to the training provider within 21 days of the report date. Once Workforce Partnership Finance Department has prepared the payment, the check number, check amount, and check print date will be entered into CalJOBS. Staff can run the CalJOBS Payment Report to view all vouchers that have been processed by Workforce Partnership Finance Department.

The Finance Specialist is responsible for the following:

- Printing Training Vouchers
 - In the **Menu** section
 - Select **Manage Funds**
 - Click the IFT Fund Management link
 - Select **Manage Obligations**
 - Enter Participant's First Name & Last Name in the designated fields
 - Select **Search**
 - Select **View**
 - Select **Print** and **Save Voucher**
- Adding payment information to the participants profile in CalJOBS
 - Select **Add a Payment**
 - Under the **Manage Payments** section
 - Select **Processed**
 - Under **Paid Data** field
 - Enter the payment date
 - Under the **Check No.** Field
 - Enter the check number
 - Under the **Details** section, in the Other Costs box
 - Enter the amount that was paid
 - Under the **Final Payment** section
 - Select the number of further payments that will be made against the obligation
 - Select **Save**
 - Send weekly payment reports to the Training Services and Business Experience teams

I. Data Change Requests, Voids, and Discontinuations

Participants, at their right, may discontinue training at any point during the program. It is the responsibility of the Career Navigator and Training Provider to work with each participant and ensure their training needs are met. However, a participant may not switch to a different program and/or provider under the same Training Agreement and may not be eligible for another ITA/ATA if they discontinue. Discontinuations will be evaluated on a case-by case basis by Workforce Partnership. Discontinuations will be evaluated on a case-by case basis by Workforce Partnership.

1. Data Corrections

An ITA/ATA correction occurs when the data in CalJOBS needs to be corrected and/or data needs to be inputted after a system closure in CalJOBS.

Data corrections must be submitted if data related to the training activity code was inputted incorrectly and/or not entered and it has been more than 30 days.

The Training Funds Coordinator is responsible for processing Data Change Requests via the DCR Ticket system. The DCR request must come from a Career Center Supervisor. To request a DCR, please submit an email to the Training Funds Coordinator to the provider_trainings@workforce.org email.

Email must include:

Subject line: DCR – Participant’s Full Name

Content:

1. Participant's First and Last Name:
2. WIOA#:
3. State ID#:
4. Reason for the DCR/Void (be specific):
5. Steps taken to avoid recurrence (be specific):
6. Data correction or Void
7. Provide correct dates if it's a data correction:

Reference **Chapter 5: CalJOBS Data Entry Policies and Procedures** for required fields and procedures.

2. Training Void

An ITA/ATA Void occurs when a participant decides to forego training, meaning a participant does not start training and no costs are incurred.

Voiding a Training Process

Voids can only be submitted if no actual start date was entered, and no voucher was submitted through CalJOBS.

1. A Training Void requires a Data Change Request (DCR) be sent from the Career Center Supervisor to the Training Funds Coordinator via email. Refer to guidance included under Data Corrections.
2. In CalJOBS, the Career Navigator will enter an attached case note to the training activity code. Case note must include the following:
 - Subject Line: Activity Code – Activity Code Description + “VOID”
 - Case note text explaining the reason for void.
 - **Example:**

Subject line: 300 – Occupational Skills Training (Approved ETPL Provider)
VOID

Content: Participant could not commit to training schedule due to caretaking responsibilities.

3. Training Discontinuation

An ITA/ATA Discontinuation occurs when a participant starts training and then discontinues training. If the participant’s discontinuance is due to an unforeseeable emergency (i.e., documented illness) then the participant is eligible for reinstatement, based on approval.

Discontinuation Process

1. The Career Navigator shall enter the correct last date of training and ITA/ATA completion status.
 - If a start date was entered and no voucher submitted, update the completion status to drop out of activity.
 - If a start date was entered and a voucher was submitted, update the completion status to unsuccessful completion.
2. The Career Navigator shall enter an attached case note to training activity code; case note

must include the following:

- Subject Line: Activity Code – Activity Code Description + “Update”
- Example: “300 – Occupational Skills Training (Approved ETPL Provider) Update”
- Case note text explaining the reason for discontinuance and the last day the participant attended training.

Subject line: 300 – Occupational Skills Training (Approved ETPL Provider) Update
Content: Participant could not commit to training schedule due to caretaking responsibilities and decided to discontinue training until they obtained reliable support for their relative. Last day of attendance was 02/28/23.

Note: A DCR to remove a training activity code cannot be submitted for a discontinuance once payment has been received by the training provider unless a full refund has been received and processed by Workforce Partnership Finance Department. Any partial payment to the training provider also disqualifies the training activity code from being removed in CalJOBS.

J. REFUND POLICY AND PROCESS

Training providers must notify the Career Navigator in the event a student discontinues training. The Career Navigator shall notify the Training Funds Coordinator and request a refund from the training provider. All attempts to recover the WIOA Title I training funds provided to the training institution must be documented.

Training Fund Coordinator must document the following:

- a. The refund policy of the training provider for early termination from the training program, including when a refund will no longer be honored.
- b. A request of the training provider to notify the service provider if the student discontinues training.
- c. The percentage of the advanced payment to be returned.
- d. Turnaround timeframe for the refund. Efforts and outcomes to recover WIOA Title I training funds must be documented in case notes recorded in the applicable training service activity code.

Training Providers are required to refund all or a portion of the cost of the training if a participant does not complete the program or any overpayment of program costs. If a provider has a tiered drop (i.e., allows for full and/or partial refunds depending on portion of program completed) and refund policy which has been approved by the accrediting body and is publicly available to all perspective students, that policy may be used; however, a copy must be provided to SDWP for review and approval. Examples of an overpayment may be for supportive service costs not utilized by the participant as part of the total cost (i.e., books, tools, fees, etc.). Refer to **CHAPTER 4, PART 3, ATTACHMENT – ETPL POLICY AND PROCEDURES** for the ITA/ATA refund policy.

K. PROGRESS REPORT & ATTENDANCE

The training provider must provide a monthly progress report on the participant’s progress and attendance to the Career Navigator by the tenth business day of each calendar month, as part of the training Agreement. In the event the participant fails to attend school, the training provider must inform the AJCC within three (3) days of consecutive non-attendance. In the event the student is terminated for non-attendance, the school must refund the unused WIOA training funds within ten (10) business days of the student’s last date of attendance. If the training provider fails to provide progress and attendance reports, the Career Navigator shall contact the training provider or Participant to obtain this information. All attempts to obtain the reports must be entered into CalJOBS. Training Providers can refer to **CHAPTER 4, PART 3, ATTACHMENT – PARTICIPANT**

EVALUATION & PROGRESS REPORT FORM.

III. Exhibits

ITA/ATA Customer Training Contract
ITA/ATA Research Form