INDIVIDUAL TRAINING ACCOUNT (ITA) CHECKLIST

The purpose of this checklist is to ensure that the necessary steps are taken and the appropriate documents are completed in order to justify the need for training and that your request to procure training through the ITA process is complete. Training requests that have already started prior to the ITA approval process will not be accepted. Agency responsible will assume full responsibility and will not be authorized to use WIA funds to procure the training.

As of July 1, 2012, preference will be given to ITAs in the following sectors: Information Technology (IT), Health Care, and Hospitality. Checklist does not apply to ITA Sectors.

- ☐ Complete and sign ***Intensive Services to Training Determination Form***
- ☐ Complete and Sign by both Case Manager and Participant a revised or updated ***Individual Employment Plan***
- ☐ Complete Comprehensive Vocational Assessment (WorkKeys or KeyTrain) to ensure that assessment matches the training request with a determination of the ability to successfully complete the training.
- ☐ Provide evidence that participant is unable to obtain or retain employment that leads to self-sufficiency through intensive services:
  - ☐ Job Search History Form
  - ☐ Rejection letters from employer(s)
  - ☐ Email transactions
- ☐ Ensure Participant completes and signs a training request letter expressing desire, interest, and need for training, inability to obtain or retain employment due to lack of skills, choice of training and training provider and why, and research of other funding sources to support the expenditure of WIA dollars (i.e,: financial aid, Pell Grant, etc.).
- ☐ Complete ***Training Provider and Labor Market Research Form*** that identifies similar training offered, cost of training, performance appraisals, employers that are hiring and viability and demand in the labor market.
- ☐ Provide printout of the ETPL Training Provider/Program Information that details the description of training, costs, length of training, and other services.
- ☐ Complete and Sign (Participant, Case Manager, Manager) ***Individual Training Account Worksheet*** – ITA funding amounts per customer are not to exceed $6,000. WIA customer will be responsible for paying the training provider for the costs in excess of $6,000.

Upon completion of the above and ensuring that those documents are in the participant's case file, Case Managers must then contact OEWD Contract Compliance Specialist to schedule an appointment to review the ITA request and case file, or drop off case files with ITA request to OEWD office. OEWD Contract Compliance Specialist will review request and return within two business days. Case managers must ensure that sufficient time is allotted for the review and approval process before the start date of the training.

Upon approval of the ITA request (ITA Worksheet signed and approved by OEWD Contract Compliance Specialist), case manager will take the following steps:

☐ Provide the training provider with a ***Training Contract Agreement*** which outlines all the deliverables and expectations.

☐ Ensure that both the authorized training provider representative and your authorized agency representative sign and date the contract and all related forms. Create two of the same contract with both parties having original signatures.

☐ Maintain the original contract and forms and provide OEWD with copies.

☐ Enroll participant in WorkforceCentral (WFC) identifying training activity, training provider, program code and provider codes.

☐ Monitor participant's progress, attendance, etc. by checking in with both the training site and the participant periodically.

☐ Maintain an Individual ***Training Account Log*** which tracks service dates, related expenses, etc.

☐ Track all training-related payments and/or refunds.

☐ Obtain a copy of diploma, certificate of completion or degree from the training institution for the participant's file.