



Non-Individual Training Account (ITA) Review Checklist

Customer Name: _____

Last 4 digits SSN: _____

Advisor Name: _____

Date: _____

Sup/Mgr. Check	Description	Response
	Is training in a demand cluster?	Yes, which cluster? G overnment/Education O re Mining C onstruction H ealthcare A KA Logistics M anufacturing P rofessional Scientific & Technical Services No, specify industry:
SYSTEM REVIEW		
	Enrolled/Grant	Adult Dislocated Worker (DW)
	102 Activity/End Dates	Yes No
	203 Activity/End Dates	Yes No N/A
	205 Activity/End Dates	Yes No
	328 Activity/End Dates	Yes No
	TAA – 312 Activity/End Dates	Yes No N/A
	GED/HSD	Yes No
	CASAS results (TABE)	Yes No N/A If already attending, this is not necessary.
	Has the customer received prior training?	Yes No
	Quality Resume	Yes No
CASE NOTES		
	Enrollment	Yes No
	DW explanation	Yes No N/A
	TAA Eligible	Yes No N/A
	102 Initial Assessment	Yes No
	205 Individual Employment Plan (IEP)	Yes No
	203 Assessment results or degree	Yes No N/A
	Training justification	Yes No
	Has the customer received prior training? If yes, was case note entered?	Yes No Yes No
	Contacted Transitional Assistance Department (TAD) to discuss customer's eligibility for participation in WIOA.	Yes No N/A
	Self Sufficiency Worksheet	Yes No



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CASE NOTES Continued				
	Title of the training program	Yes	No	
	Name of the school	Yes	No	N/A
	Length of program and dates of attendance	Yes	No	N/A
SCANNED DOCUMENTS				
	Right to Work Documents	Yes	No	P2E
	Training Enrollment Verification (TEV)	Yes	No	N/A
	ADD Documents	Yes	No	
	Initial Assessment	Yes	No	
	Training Exploration Packet	Yes	No	
	Selective Service	Yes	NA	P2E
	Self-sufficiency worksheet, calculator and LMI printout	Yes	No	
	Proof of program requirements	Yes	No	If yes, what proof is on file? Educational Plan School contract School website printout listing requirements Course Syllabus Other:
	ETPL or Course Description	Yes	No	
	Proof of registration for classes	Yes	No	
	Proof of filing FAFSA	Yes	No	N/A
	Client Release Form	Yes	No	

Supervisor/Manager response to the following question:

Sup/Mgr. Check	Description	Response	
	Is there a case note referencing the Non-ITA approval?	Yes	No

Sup./Mgr. Name: _____
(Print Name)

Date: _____

Sup./Mgr. Signature: _____