

ITA Checklist



Participant Name: _____

The following must be completed ***before*** entering the Initial ITA Request service in Career Connect. All Documentation must be in customer file. This document ***must*** be uploaded to ISTS or the ITA Application will be denied.

Minimum of 2 Exploration forms in file

Enter the numeracy and literacy scores.

Certify the participant for training (Adults and Dislocated Workers).

Create the Individual Employment Plan (IEP) / Individual Service Strategy (ISS).

Enter the Develop IEP/ISS service.

Assign a Career Coach to the WIOA application.

Case Note Requirements

- Training Exploration Form Results Case Note: This case note should document the 2 - 3 schools the customer visited and should include the school's name, person they spoke with and which school they chose and why.
- Training Justification Case Note: Participant must be suitable for the occupation chosen. List the participants current skills and what skills are needed for their training program.
 - Job readiness, career exploration testing, and assessment of the participant's aptitude and interests related to the selected training program should be case noted.
 - If the participant has an associate degree or above; passed the school entrance/placement exam dated within the last year for adult program clients and 6 months or less for youth programs, which is related to the program description in Illinois workNet; whether the Training Program does not require Math test or if the client is only going to participate in an OJT, Customized Training, or Work Experience should be case noted.
- All Occupations in Yellow require a case note. The case note should contain the following information:
 - Identify that the participant's chosen training program is in Yellow.
 - Documentation showing the participant was informed that the chosen Yellow occupation is in lower demand or has lower wages than those in Green.
 - The career pathway for this occupation, if any, has also been explained to the customer.
 - The customer should understand all information given to her/him and wants to continue with the approval of the ITA for this occupation.

CDL Requires that participants must be 21 or older.

Please Note: Once participant begins their training enter code 300: Occupational Skills Training

This form has been completed by _____ at _____ on _____

Career Coach Name

Agency Name

Date