



ITA Service Procedures

Overview

Every participant that receives an Individual Training Account (ITA) to attend occupational training must have a 300-Occupational Skills Training (ITA) service (Adult/DW) or a 453-Occupational Skills Training service (Youth) in Career Connect. These procedures explain the process for correctly adding this service.

Suitability

Prior to issuing ITAs to customers, please make sure that:

- Participants meet the minimum requirements of the training program.
- Their individual barriers have been addressed.
- Jobs are available in the training industry. Research regarding the availability of the jobs may be based on training-related placements of previous program participants as reflected in Illinois WorkNet and other LMI resources such as Career One Stop. For individuals with barriers, employers should be willing to hire them upon completion of their training.

Suitability should be documented in the participant's case note section entitled Suitability for Training.

Navigation

An Occupational Skills Training (ITA) service is opened when the participant starts training at a certified training provider. An Occupational Skills Training service can be added in the WIOA Program screen under Staff Profile>Case Management Profile>Programs>WIOA under the Activities/Enrollments/Services bar.

Requirements

The following steps need to be completed **before** entering an Occupational Skills Training (ITA) service in Career Connect:

- Add Math and Reading test scores in the WIOA Educational Functioning Level for Measurable Skills Gain.
- Develop an IEP/ISS (Staff Profile>Case Management Profile>Plan).
- IEP/ISS should address the need for training in order to reach customer end goal.
- Add a Develop IEP service (code 205 for Adult/Dislocated Worker) and/or an ISS Service (code 413 for Youth) in the WIOA Activities/Enrollments/Services bar.
- For Adult and Dislocated Workers, complete the WIOA Training Criteria section on the State Specific tab of the WIOA Application.

Procedures

1. Under Manage Individuals click on “Assist an Individual” and search for your customer. Click on the Programs Tab link located on the right-hand side.

Results View: [Summary](#) | [Detailed](#)

To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
BGARDEN1519	Beatrice	Garden	1519		3913803	09/28/2017		09/28/2017	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>

2. When you are on the Program Tab, scroll down to the WIOA application and click on the plus sign to expand the application tabs. Once the application has been expanded scroll down toward the middle of the page and click on the plus sign of the Activities/Enrollment/Services bar.

⊞ Eligibility Summary	
⊞ Participation	09/28/2017
⊞ Activities / Enrollments / Services	11
⊞ Measurable Skills Gain	0
⊞ Partner Programs	0

3. When you are on the Activities/Enrollments/Services bar, click on Create Activity/Enrollment/Service. Under the General Information Tab, select the Customer Program Group, also known as the program title, and the Office Location.

General Information	Service Provider	Enrollment Cost	Financial Aid	
General Information				
Participant User Name:	BGARDEN1519			
Participant State ID:	3913803			
Last Name, First Name MI:	Garden, Beatrice			
Social Security Number:	1519			
Address:	1519 W. Chicago Ave. Chicago, IL 60625			
Application Summary:	Program:WIOA Application Date:9/28/2017 Earliest Eligibility Date:09/28/2017			
Participation Date:	09/28/2017			
* Customer Program Group:	<input type="text" value="10B - Adult - Individualized Services/Training"/>			
* LWIA Region:	<input type="text" value="Chicago Cook Workforce Partnership"/> <small>LWIA cannot be modified if staff has local region assignment.</small>			
* Office Location:	<input type="text" value="Central States SER - Healthcare Bridge (1041)"/>			

4. Scroll down to the Enrollment Information Section.

- Service Activity Level: For Adult/DW select Training Services; for Youth select Academic Learning Services.
- Select the 300-Occupational Skills Training (ITA) activity code for Adult/DW or the 453-Occupational Skills Training (ITA) activity code for Youth.
- Enter the Actual Begin Date and the Projected End Date.
- Leave Any Class Attended Through Distance Learning as No.
- Select Yes for Participant has been issued an ITA and the ITA will pay for this service.

*** Service Activity Level:**

*** Activity Code:**

[\[Select Activity Code \]](#)

Projected Begin Date:

Actual Begin Date:

*** Projected End Date:**

Any classes attended through Distance Learning:

 Yes No

Participant has been issued an ITA and the ITA will pay for this service:

5. Scroll Down to State Specific Information.
 - Select the grant number for the program under State Fund.
 - Click No for Bridge Program Activity and Green Related.

State Specific Information

*** State Fund:**

Supports Bridge Program: Yes No

Bridge Program Activity: Yes No

Green Related: Yes No

6. Scroll down to the end of the page and click Next.

Case Notes: [Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

[Next >>](#)

[Exit Wizard](#)

7. On the Service Provider Tab:

- Select the training provider under Provider.
- Select the program name under Service, Course or Contract.
- If the training location is not displayed automatically, then select the training location under Provider Locations.
- Click under Occupational Training Code and select the code associated with this program.
- The Relationship Number should display automatically. If it does not, then the Provider Location is not associated with the relationship number for this training provider. In this case, select a different location from the one selected and add a case note indicating which location the customer is attending.
- Click Next so the information saves.

General Information | **Service Provider** | Enrollment Cost | Financial Aid | Enrollment Budget

Enrollment Service Provider Information

Enrollment Summary: Enrollment ID: 260522
Username: BGARDEN1519
WIOA Application ID: 314632
Activity Code: 300 - Occupational Classroom Training (ITA) (424)
Activity Dates: 10/26/2017 - 12/26/2017

WIOA Application ID: 314632
Activity Code: 300
Activity Dates: 10/26/2017 - 12/26/2017

* Provider: Microtrain Training Recruiting Consult
[\[Select Provider \]](#)

* Service, Course or Contract: A +/- Network +
[\[Select Service, Course or Contract \]](#)

Provider Locations: MicroTrain Technologies(#)
720 E. Butterfield RoadBR>Suite #100
Lombard, IL 60148
[\[Select Provider Locations \]](#)

Provider Contacts: Jim Blood
[\[Select Provider Contacts \]](#)

* Occupational Training Code: 29209900 - Health Technologists and Technicians, All C
[\[Occupational Training Code \]](#)

Relationship Number: 4000235

[\[Exit Wizard \]](#) << Back **Next >>**

- Once you are on the Enrollment Cost section, skip over the Financial Aid, Enrollment Budget, Budget Planning tabs and click on the Closure Information tab. The training program budget will populate the “Cost” screen. Once you are on the Closure Information Tab click Finish, the system will take you back to the Activities/Enrollments/Services bar and you will see your service has been added.

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	300 - Occupational Classroom Training (ITA) (424) Microtrain Training Recruiting Consult		Adult	N/A	10/26/2017	12/26/2017	Close

When the customer has completed training or is no longer attending training do not forget to close the service. In order to close the Occupational Skills Training (ITA) service go back to the service and click on Close under Actual End Date. Enter the Last Activity Date, select the Completion Code and click Finish to save the update.

Result

The Occupational Skills Training (ITA) service has been recorded properly and when the customer has successfully completed training the credential can be added.