



WESTERN OKLAHOMA WORKFORCE DEVELOPMENT BOARD
Individual Training Account (ITA) Checklist
Approved 11.28.17

Participant Name: _____ Participant ID #: _____

WIA Title I Program: [] Youth [] Adult [] Dislocated Worker - *Date of Dislocation* _____

Training Program: _____ CIP Code: _____

Training Dates: _____ Training Institute: _____

Is the career associated with this training on the Demand Occupations List? [] Yes [] No

As appropriate, check the box of items to be found in the ITA section of this case file. Items should be placed in this section in the order listed below and uploaded altogether under ITA Documentation in OSL.

- 1. WIOA Application (Upload Separately)
- 2. Job Search Verification (as appropriate) – OSL Referrals, Job Search Worksheet, or UI Job Searches
- 3. Approval Email from Workforce Board – as verification program is approved for WIOA fund, cost Match information from the schools (if not notify Workforce Board Staff). The email takes the place of the OSL screens since OSL is not working properly for the ETP information.
- 4. Financial Aid Verification – ****Award Letter**** shows all financial resources student is able to receive (contact financial aid officer at the school to obtain this letter), TAA Notification, DRS Award Letter, Coordination of Training Funds (CoTF) form, other aid, etc.
- 5. Acceptance Letter to training/Proof of enrollment
- 6. ITA Request
- 7. ITA Acknowledgement and Agreement
- 8. ITA Voucher(s)
- 9. ITA Balance Sheet (Uploaded Separately)
- 10. Certificate from Occupational Skills Training, Licensure, or Final School Transcripts

