

ENTERING CREDENTIALS INSTRUCTIONS

NOTE: Credentials must be entered on both the TAA Application and the WIOA Application for co-enrolled participants. The system does not transfer the data entered from one application to the other.

Click on **Credentials** on the **Application Menu** on the **TAA Application** for the participant.

IWDS Illinois Workforce Development System **Case Management**

Application Menu
Steve Perry Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019
Printable Application

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Profile

- [Contact Information](#)
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- [List All Documents](#)
- [Create TAA Template](#)

Services

- [List Enrolled Services](#)
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Exit

- [Exit Summary](#)
- [View Wages](#)
- [View TAA Costs](#)

Click **Add Credential**.

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List Credentials

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

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Credential	Institution	Date Attained	Updated By	Created
H.S. Diploma / Equivalency / G.E.D.	Springfield High School	05/21/1983	Sheila Sloan	2019-02-21 11:41:02.442

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Complete the fields on the screen.

IWDS Illinois Workforce Development System **Case Management**

Add Credential
[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

*Credential:
*Institution:
*Source:
*Date Attained:
*Description of Credential/Diploma:

Save Cancel

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Credential options:

- H.S. Diploma / Equivalency / G.E.D.
- A.A. or A.S. Diploma / Degree
- B.A. or B.S. Diploma / Degree
- Occupational Skills License
- Occupational Skills Certificate or Credential
- Other Recognized Diploma, Degree, or Certificate
- Occupational Certification
- Graduate/Post Graduate

Institution: Enter the name of the training institution that awarded the credential.

Source options:

- Copy of certificate
- Copy of credential
- Copy of degree
- Copy of diploma
- Copy of Graduation List
- Written verification or transcript from training institution

Date attained: Enter the date the institution awarded the credential.

Description of Credential/Diploma: Provide a description of the credential/diploma, such as the type of program completed, occupational field, etc.

Once all fields have been entered, click **Save**.

IWDS Illinois Workforce Development System **Case Management**

Add Credential
[Steve Perry](#) [Application Summary](#)
 SSN: 0503 App LWA:15 App Date:02/13/2019

*Credential: B.A. or B.S. Diploma / Degree
 *Institution: Bradley University
 *Source: Copy of degree
 *Date Attained: 12/15/2021
 *Description of Credential/Diploma: Accounting and Business Management

Save Cancel

The credential has been added to the **Credentials Screen**.

IWDS Illinois Workforce Development System **Case Management**

List Credentials
[Steve Perry](#) [Application Summary](#)
 SSN: 0503 App LWA:15 App Date:02/13/2019

Add Credential Return

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Credential	Institution	Date Attained	Updated By	Created
B.A. or B.S. Diploma / Degree	Bradley University	12/15/2021	Sheila Sloan	2022-01-07 14:52:07.106
H.S. Diploma / Equivalency / G.E.D.	Springfield High School	05/21/1983	Sheila Sloan	2019-02-21 11:41:02.442

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Add Credential Return

Add **Case Management Services** in IWDS on the WIOA and Trade applications based on the following:

For participants covered by certifications numbered up to 97,999:

Trade Application:

Trade Application Entry (Add Additional Episode to Trade Case Management Service Record)

Click **List Enrolled Services** on the **Application Menu** on the **TAA Application** for the participant.

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Steve Perry [Application Summary](#)
SSN: 0503 **App LWA:**15 **App Date:**02/13/2019
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Services

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Exit

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Click on Trade Case Management – TAA.

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Services

[Steve Perry](#) [Application Summary](#)
SSN: 0503 **App LWA:**15 **App Date:**02/13/2019

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	10/25/2020	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

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Click **Add Additional Episode**.

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Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
Date Created: 10/29/2020
Last Updated By: Sheila Sloan
Last Updated: 10/29/2021
Approved/Denied By:
Approved/Denied Date:
Title: TAA
Service Level: Employment and Case Management
Activity: Trade Case Management **Same Day Service**
***Grant:** 17661015-United Workforce Development Board aka Career Link
Provider: *1502-00 Carl Sandburg College
Start Date: 10/25/2020
End Date: 10/25/2020
Current Status: Successful Completion
***Weekly Hours:** 10.0
*** Bridge Program Activity?:** No
Comments:
TAA Services Completed: Click Confirm when all TAA Services have been completed

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **TAA/NAFTA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. At the top, a red banner contains the IWDS logo and the text "Illinois Workforce Development System Case Management". On the left, a blue sidebar menu lists various options: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), "FAQs", and "I'm Done: Log Off". The main content area features a yellow "Informational Message" box stating that a Case Note must be completed when an Additional Episode is added to a Same Day Service. Below this is the "Add Case Note" form, which includes fields for Staff Name (Sheila Sloan), Contact Date (11/01/2021), Program (TAA/NAFTA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management Services), and a text area for the Case Note (Provided Case Management Service to participant.). A "Save and Return" button is located at the bottom of the form.

NOTE: The End Date for the Trade Case Management – TAA Service Record has updated with the current date of the entry that was just made.

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IWDS
Illinois Workforce
Development System
Case Management

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SSN: 0503 **App LWA:** 15 **App Date:** 02/13/2019

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

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WIOA Application: No Entry.

For those participants covered by certifications numbered 98,000+ (2021R):

Trade Application: No entry.

WIOA Application:

WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).

Click **List Enrolled Services** on the **Application Menu** on the **WIOA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. Below this are three columns of links: "Application" (Guided Application, Application Definition, Assessment Summary, Concurrent Programs, Characteristics and Barriers, Employment Characteristics, Education Status, Tests, Public Assistance, Family Characteristics, Income Calculation, Dislocated Worker Characteristics, LWA Specific Data, WIOA Training Criteria, Eligibility Determination), "Profile" (Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents), and "Services" (List Enrolled Services, ITA Characteristics, List Part Time/Distance Learning). The "Services" section is highlighted with a red box. At the bottom right, there is an "Exit" section with links for Exit Summary, View Wages, and Performance Impact.

Click on **Career Planning (Case Management) – 1DC**.



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SSN: 0503 App LWA:15 App Date:02/13/2019

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Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	Career Planning (Case Management) - IDC	Successful Completion	Sheila Sloan

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Click **Add Additional Episode**.



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Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
Date Created: 11/01/2021
Last Updated By: Sheila Sloan
Last Updated: 11/01/2021
Title: IDC
Service Level: Career Services
Activity: Career Planning (Case Management) *Same Day Service*
***Grant:**
Provider: *1537-00 [Bradley University](#)
Start Date: 11/01/2021
End Date: 11/01/2021
Current Status: Successful Completion
Comments:

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **WIOA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.

The screenshot shows the IWDS (Illinois Workforce Development System) Case Management interface. The header is red with the IWDS logo and text. A blue sidebar on the left contains navigation menus. The main content area has a yellow informational message and a form titled 'Add Case Note'. The form includes fields for Contact Date, Program, Note Category, Confidential status, Note Subject, and Case Note, along with a 'Save and Return' button.

Informational Message:
A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

Add Case Note
[Steve Perry](#) [Application Summary](#)
Staff Name: [Sheila Sloan](#)

*Contact Date: 11/01/2021
Program: WIOA
*Note Category: Case Note Supporting Same Day Service
*Confidential: No
*Note Subject: Case Management
*Case Note: 11/1/21 Case Management for participant


Save and Return

Upon exit of the participant, also make sure to enter credentials earned on the **Exit Control Panel Screen**.

Click **Exit Summary** on the **Application Menu** on the **TAA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header, the page is titled "Application Menu" for "Steve Perry" with an "Application Summary" link. Key information includes "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". A "Printable Application" button is visible. The main content is organized into three columns: "Application", "Profile", and "Services". The "Application" column lists various application-related links such as "Guided Application", "Application Definition", "Assessment Summary", "TAA Training Criteria", "TAA Additional Info", "Concurrent Programs", "Characteristics and Barriers", "Employment", "Characteristics", "Education Status", "Tests", "Public Assistance", "Family Characteristics", "Income Calculation", "Dislocated Worker Characteristics", "LWA Specific Data", "Eligibility Determination", "List TAA Status", and "List IDES View". The "Profile" column lists links for "Contact Information", "Additional Contacts", "Private Information", "Veterans Information", "Employment History", "Credentials", "Education Status - In Program Update", "Measurable Skill Gains", "List All Documents", and "Create TAA Template". The "Services" column lists "List Enrolled Services" and "List Part Time/Distance Learning". An "Exit" section at the bottom right contains three links: "Exit Summary" (highlighted with a red box), "View Wages", and "View TAA Costs". On the left side, there is a blue sidebar menu with sections for "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off).

Click **Update** for the **Credentials** section.

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Exit Control Panel

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

GENERAL	Exit Date: NOT EXITED	<input type="button" value="Update"/>	<input type="button" value="Update TAA Only"/>						
<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="text-align: left;">Title</th><th style="text-align: left;">Registration Date</th><th style="text-align: left;">Exit Reason</th></tr></thead><tbody><tr><td>TAA</td><td>02/13/2019</td><td></td></tr></tbody></table>	Title	Registration Date	Exit Reason	TAA	02/13/2019				
Title	Registration Date	Exit Reason							
TAA	02/13/2019								
CREDENTIALS	Enter Credentials Attained	<input type="button" value="Update"/>							
EMPLOYMENT AT EXIT	No Employment Specified	<input type="button" value="Update"/>							
Q1 POST EXIT	UI Wages: No Supplemental Q1 Information Specified								
Q2 POST EXIT	UI Wages: No Supplemental Q2 Information Specified								
Q3 POST EXIT	UI Wages: No Supplemental Q3 Information Specified								
Q4 POST EXIT	UI Wages: No Supplemental Q4 Information Specified								
WAGE DATA		<input type="button" value="View"/>							
	Pre-Enrollment		Current/Exit						
	Jan - Mar 2019 Not Available		Jan - Mar 2022 Not Available						
	Oct - Dec 2018 Not Available		Oct - Dec 2021 Not Available						
	Jul - Sep 2018 Not Available		Jul - Sep 2021 Not Available						

The system will transfer you to the **List Credentials Screen** in IWDS.

Click **Pick** beside the appropriate credential.

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List Credentials

[Steve Perry](#) [Application Summary](#)
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Add Credential Return

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	Credential	Institution	Date Attained	Updated By	Created
Pick	B.A. or B.S. Diploma / Degree	Bradley University	12/15/2021	Sheila Sloan	2022-01-07 14:52:07.106
	H.S. Diploma / Equivalency / G.E.D.	Springfield High School	05/21/1983	Sheila Sloan	2019-02-21 11:41:02.442

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Add Credential Return

The system will ask you to confirm your selection. If the correct credential is listed, click **Pick Credential**.

If it is not the correct credential, click **Cancel** to return to the **List Credentials Screen** to select the correct credential.


IWDS Illinois Workforce Development System Case Management

Staff Menu
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Please fix the following before continuing:
You have chosen to associate the B.A. or B.S. Diploma / Degree from Bradley University to the current application at exit time. Please click on Pick Credential to confirm your changes.

Pick Credential Cancel

The credential has been added to the **Exit Control Panel Screen**.


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Informational Message:
 Update Successful

Exit Control Panel

[Steve Perry](#) [Application Summary](#)
SSN: 0503 **App LWA:** 15 **App Date:** 02/13/2019

GENERAL	Exit Date: NOT EXITED	<input type="button" value="Update"/>	<input type="button" value="Update TAA Only"/>
Title	Registration Date	Exit Reason	
TAA	02/13/2019		
CREDENTIALS	Type	Institution	<input type="button" value="Update"/>
	B.A. or B.S. Diploma / Degree	Bradley University	Date 12/15/2021
EMPLOYMENT AT EXIT	No Employment Specified		<input type="button" value="Update"/>
Q1 POST EXIT	UI Wages: No Supplemental Q1 Information Specified		
Q2 POST EXIT	UI Wages: No Supplemental Q2 Information Specified		
Q3 POST EXIT	UI Wages: No Supplemental Q3 Information Specified		
Q4 POST EXIT	UI Wages: No Supplemental Q4 Information Specified		
WAGE DATA			<input type="button" value="View"/>
	Pre-Enrollment	Current/Exit	