

JOB SEARCH ALLOWANCE INSTRUCTIONS

To enter a Job Search Allowance, the career planner will do the following:

Complete an **Application for Trade Job Search Allowance Commerce/Trade Form #012 (Job Search Application)**.

If this is the initial service for the participant:

Complete a **Trade Individual Employment Plan Commerce/Trade Form #014 (IEP)**.

Enter the **IEP Service Record** by selecting **List Enrolled Services** under the **Services** section on the **Application Menu** on the **TAA Application** for the participant.

Case Management

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

Application

- 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
- List IDES View

Profile

- Contact Information
- Additional Contacts
- Private Information
- Veterans Information
- Employment History
- Credentials
- Education Status - In Program Update
- Measurable Skill Gains
- List All Documents
- Create TAA Template

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click **Add Enrolled Service**.

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

Add Enrolled Service Printable Services Return

Select **TAA** from the drop down for the **Title**. Then click **Next**.

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

Select Title

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

*Title: TAA ▾

< Back Next >

Cancel

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Select **Individual Employment Plan** from the drop down for the **Service Level**.
Enter the **Start Date**.
Click **Next**.

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

Select Service Level and Start Date

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

Title: TAA

*Service Level: Individual Employment Plan ▾
*Start Date:

< Back Next >

Cancel

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Complete the information on the screen and click **Save**

Menu
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

AQs
[I'm Done: Log Off](#)

Edit Required Activity Information

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

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

Created By: Sheila Sloan
 Date Created: 02/22/2019
 Last Updated By: Sheila Sloan
 Last Updated: 02/22/2019
 Approved/Denied By:
 Approved/Denied Date:
 Title: TAA
 Service Level: Individual Employment Plan
 Activity: Individual Employment Plan
 Provider: *3027-00 [Workforce Network](#)
 * O*Net Code: Requires O*Net
 Start Date: 02/13/2019
 End Date:
 *Current Status:

Comments:

TAA Services Completed: Click Confirm when all TAA Services have been completed

IEP Amount:
 IEP Comments: 2/13/19 - Establishing IEP for customer Steve Perry.

Approval Type	Approver	Approved/Denied Date	Approval Status	Previous IEP Amount
Original	Sheila Sloan	02/25/2019	Approved	

Upon saving the **IEP Service Record**, IWDS will transfer the career planner to the **IEP Status Record** to complete entry.

Complete the **Status Start Date**

Enter a dated comment in the **Comment Box**

Enter an **IEP Amount Approved**, if known.

Click **Save**.

IWDS Illinois Workforce Development System Case Management

Menus

[Staff Menu](#)

[Customer Menu](#)

[Application Menu](#)

Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

FAQs

[I'm Done: Log Off](#)

Maintain TAA Status

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

TAA Petition Number: 90900 **TAA Act:** 2015
Employer Name: Caterpillar

Status: IEP
Entry Date: 02/22/2019

Status Start Date:

Status End Date:

Changes to Comments or IEP Amount Approved require DCEO Approval

Comments:

IEP Amount Approved:

Created By: Sheila Sloan **Date Created:** 02/22/2019
Last Updated By: Sheila Sloan **Date Last Updated:** 02/25/2019

Approval Type	Approver	Approved/Denied Date	Approval Status	Previous IEP Amount
Original	Sheila Sloan	02/25/2019	Approved	

Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
There is nothing to display.					

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 (Initial Trade Case Management Service)

Click **List Enrolled Services** 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

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click **Add Enrolled Service**.

IWDS Illinois Workforce Development System **Case Management**

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

Add Enrolled Service Printable Services Return

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Start Date	End Date	Service Provided	Status	Created By
There is nothing to display.				

Page 1 of 1

Add Enrolled Service Printable Services Return

Select **TAA** for the Title from the drop down list.

Click **Next**.

Select **TAA** for **Title**.
Click **Next**.

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'. On the left is a blue sidebar menu with categories: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), and 'Universal Services' (Add Local Service, List All Services). The main content area is titled 'Select Title' and includes links for 'Steve Perry' and 'Application Summary'. Below these links are the fields 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. A dropdown menu for '*Title:' is set to 'TAA'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Select **Employment and Case Management** for the **Service Level** from the drop down list.
Enter **Start Date**. (Date of entry or date service first provided).
Click **Next**.

The screenshot shows the IWDS Case Management interface at the 'Select Service Level and Start Date' step. The header and sidebar are identical to the previous screenshot. The main content area is titled 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. Below these links are the fields 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. The 'Title:' field is set to 'TAA'. The '*Service Level:' dropdown menu is set to 'Employment and Case Management'. The '*Start Date:' field contains '11/1/2021' with a clear 'x' button. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Complete all required fields:

Search Providers – Click on the **Search Providers Button** and see instructions below.

End Date – today’s date or date service provided.

Current Status – Select Open, Successful Completion or Unsuccessful Completion. Usually this would be marked as Successful Completion.

Weekly Hours – enter estimated number of weekly hours case management is being provided.

Bridge Program Activity – Usually marked “No”.

Comments – Enter a dated comment in the comment box describing the case management being provided to the participant.

The screenshot displays the 'IWDS Illinois Workforce Development System Case Management' interface. The main heading is 'Add Required Activity Information'. The user is identified as Steve Perry, with an application summary link. The SSN is 0503, App LWA is 15, and App Date is 02/13/2019. The form is created by Sheila Sloan for a TAA service. The service level is 'Employment and Case Management' and the activity is 'Trade Case Management Same Day Service'. The grant is '17661015-United Workforce Development Board aka Career Link'. The provider is currently set to 'Search Providers'. The start date is 10/25/2020, and the end date is blank. The current status is 'Open', and weekly hours are blank. The bridge program activity is set to 'No'. There is a large text area for comments. At the bottom, there is a 'Confirm' button with a red instruction: 'Click Confirm when all TAA Services have been completed'. Other buttons include '< Back', 'Additional Info', 'Save', and 'Cancel'. A left-hand menu contains links for Staff Menu, Customer Menu, Application Menu, Case Notes, Universal Services, and FAQs.

To **Search Providers:**

Click **Show All**

Select **Provider** from list. This should be the LWIA providing the case management service unless there is another organization providing the case management service. If so, select the appropriate provider of the case management service.

The screenshot shows the 'Search Provider Relationships' page in the IWDS Case Management system. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: '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'. The main content area has a 'Show All' button at the top. Below it are input fields for 'Provider Relationship Name', 'Relationship Number', and 'Statutory Program' (set to TAA/NAFTA). Other fields include 'Title' (TAA), 'Service Level' (Employment and Case Management), 'Activity' (Trade Case Management), and 'Start Date' (10/25/2020). At the bottom are 'Search' and 'Return' buttons.

Click **Save**.

The screenshot shows the 'Add Required Activity Information' page in the IWDS Case Management system. The header is the same as the previous page. The sidebar menu is also present. The main content area shows details for a participant: 'Steve Perry' with a link to 'Application Summary', 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. It lists 'Created By: Sheila Sloan' and 'Title: TAA'. The 'Service Level' is 'Employment and Case Management' and the 'Activity' is 'Trade Case Management' with a red link for 'Same Day Service'. The '*Grant:' field is '17661015-United Workforce Development Board aka Career Link'. The '*Provider:' field is '*1502-00 Carl Sandburg College' with a 'Search Providers' button. Other fields include '*Start Date: 10/25/2020', '*End Date: 10/25/2020', '*Current Status: Successful Completion', and '*Weekly Hours: 5'. The '* Bridge Program Activity?:' is 'No'. The 'Comments:' field contains '10/25/2020 Providing case management to participant.'. At the bottom, there is a 'TAA Services Completed:' section with a 'Confirm' button and a red instruction: 'Click Confirm when all TAA Services have been completed'. Below this are '< Back', 'Additional Info', 'Save', and 'Cancel' buttons.

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 header 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), and "FAQs" (I'm Done: Log Off). The main content area features a yellow "Informational Message" box with instructions on completing a Case Note for 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), and a text area for the Case Note (11/1/21 Case Management Provided to participant.). A "Save and Return" button is located at the bottom of the form.

Informational Message:
A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.

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

Contact Date: 11/01/2021
Program: TAA/NAFTA ▼
*Note Category: Case Note Supporting Same Day Service ▼
*Confidential: No ▼
*Note Subject: Case Management
*Case Note: 11/1/21 Case Management Provided to participant. |

Save and Return

This is the **List Enrolled Services Screen** once you have saved the **Case Management Service Record**.


IWDS
Illinois Workforce Development System
Case Management

Menus

[Staff Menu](#)

[Customer Menu](#)

[Application Menu](#)

Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

FAQs

[I'm Done: Log Off](#)

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

Page 1 of 1

WIOA Application: No entry.

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

Trade Application: No entry.

WIOA Application:

WIOA Application Entry (Initial 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 this is a blue sidebar menu with categories: "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" column is highlighted with a red box. An "Exit" section contains links for Exit Summary, View Wages, and Performance Impact.

Click **Add Enrolled Service**.

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

Add Enrolled Service Printable Services Return

0 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
There is nothing to display.				

Page 1 of 1

Add Enrolled Service Printable Services Return

Select **1DC** or **1EC** from the drop down list for **Title**.
Click **Next**.

Select Title
Steve Perry Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019

*Title: 1DC

< Back Next >

Cancel

Select **Career Services** for **Service Level** from the drop down list.
Click **Next**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: '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'. The main content area is titled 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: 1DC'. The '*Service Level:' dropdown is set to 'Career Services' and the '*Start Date:' is '11/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Select **Career Planning (Case Management)** for **Activity** from the drop down list.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: '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'. The main content area is titled 'Select Activity' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: 1DC'. The 'Service Level:' is 'Career Services'. The '*Activity:' dropdown is set to 'Career Planning (Case Management)' and the 'Start Date:' is '11/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Complete all required fields:

Search Providers – Click on the **Search Providers Button** and see instructions below.

End Date – today’s date or date service provided.

Current Status – Select Open, Successful Completion or Unsuccessful Completion. Usually this would be marked as Successful Completion.

Comments – Enter a dated comment in the comment box describing the case management being provided to the participant.

The screenshot shows the IWDS (Illinois Workforce Development System) Case Management interface. At the top, there is a navigation bar with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. Below this 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). The main content area is titled 'Add Required Activity Information' and displays the following information: 'Steve Perry Application Summary', 'SSN: 0503 App LWA:15 App Date:02/13/2019', 'Created By: Sheila Sloan', 'Title: 1DC', 'Service Level: Career Services', 'Activity: Career Planning (Case Management) Same Day Service', '*Grant: 19681015-United Workforce Development Board aka Career Link', 'Provider: *1537-00 Bradley University * Search Providers', 'Start Date: 11/01/2021', 'End Date: 11/1/2021', '*Current Status: Successful Completion', and 'Comments: 11/1/2021 - Add Dated Comment'. At the bottom of the form, there are buttons for '< Back', 'Additional Info', 'Save', and 'Cancel'.

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 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), and 'FAQs' (I'm Done, Log Off). The main content area features a yellow 'Informational Message' box stating that a Case Note must be completed when adding a Same Day Service, with instructions on how to set the Service End Date. Below this is the 'Add Case Note' form, which includes fields for Staff Name (Sheila Sloan), Contact Date (11/01/2021), Program (WIOA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management), and a Case Note text area containing 'Provided case management to participant today.' A 'Save and Return' button is located at the bottom of the form.

NOTE: Any additional WIOA funded services being provided to the participant need to be entered on the WIOA application on IWDS.

This is the **List Enrolled Services Screen** once you have saved the **Career Planning (Case Management) Service Record**.


IWDS
Illinois Workforce
Development System
Case Management

Menus

[Staff Menu](#)

[Customer Menu](#)

[Application Menu](#)

Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

FAQs

[I'm Done: Log Off](#)

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
11/01/2021	11/01/2021	Career Planning (Case Management) - 1DC	Successful Completion	Sheila Sloan

Page 1 of 1

If this is an IEP modification (IEP already state merit staff approved) for the participant:
 Complete the **Individual Employment Plan Modification Form Commerce/Trade IEP Modification Form #014a (IEP Modification Form)**.

Fill out all necessary information. Mark the **Additional service(s)** and enter **Job Search Allowance** in the List Service(s) box.

TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM			
Modification Information			
1. Participant Name: <input style="width: 100%;" type="text"/>		2. Modification #: <input style="width: 100%;" type="text"/>	
3. Date of Modification Request: <input style="width: 100%;" type="text"/>		4. Date Modification to Take Effect: <input style="width: 100%;" type="text"/>	
5. Reason for Modification: (select all that apply and complete information for the reason) NOTE: Some modifications may require submission of a new and/or updated Trade forms.			
<input type="checkbox"/> Invoking Equitable Tolling Justification: <input style="width: 100%;" type="text"/>			
<input type="checkbox"/> Waiver Change: <input type="checkbox"/> Criteria Change		<input type="checkbox"/> Date Extension <input type="checkbox"/> Revocation	
<input type="checkbox"/> Additional service(s) List Service(s): <input style="width: 100%;" type="text"/>		<input type="checkbox"/> End Service List Service(s): <input style="width: 100%;" type="text"/>	
<input type="checkbox"/> Change to Training End Date Reason: <input style="width: 100%;" type="text"/> Current End Date: <input style="width: 100%;" type="text"/> New End Date: <input style="width: 100%;" type="text"/>		<input type="checkbox"/> Switch to a New Training Program Reason: <input style="width: 100%;" type="text"/> Current Training Institution: <input style="width: 100%;" type="text"/> Current Training Program: <input style="width: 100%;" type="text"/> New Training Institution: <input style="width: 100%;" type="text"/> New Training Program: <input style="width: 100%;" type="text"/>	
<input type="checkbox"/> Changes in Cost Reason: <input style="width: 100%;" type="text"/>		<input type="checkbox"/> Change in Full-Time/Part-Time Status Reason: <input style="width: 100%;" type="text"/>	
<input type="checkbox"/> Potential Suspension Request Start Date: <input style="width: 100%;" type="text"/>		<input type="checkbox"/> Switch in On-Site/Online Status	
<input type="checkbox"/> Vacation Break Start Date: <input style="width: 100%;" type="text"/> End Date: <input style="width: 100%;" type="text"/>		<input type="checkbox"/> Switch in Transportation/Subsistence	
<input type="checkbox"/> Final Cost Reconciliation		<input type="checkbox"/> Close IEP <input type="checkbox"/> Other <input style="width: 100%;" type="text"/>	
6. How does the modification affect the total IEP cost?			
Increase \$ <input style="width: 100%;" type="text"/>	Decrease \$ <input style="width: 100%;" type="text"/>	<input type="checkbox"/> No Change	New Total IEP Amount \$ <input style="width: 100%;" type="text"/>

TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM

7. Documentation to support Modification: (Mark all that apply)		
<input type="checkbox"/> Training institution documentation	<input type="checkbox"/> Participant documentation/request	<input type="checkbox"/> File Audit
<input type="checkbox"/> Other: List documentation: <input style="width: 100px;" type="text"/>		

8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)	
Number of eligible TRA weeks remaining: <input style="width: 50px;" type="text"/>	OR
TRA Exhaustion Date: <input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/>	
With this modification, the participant has enough remaining weeks of TRA eligibility to complete the training? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If no, has the participant provided documentation demonstrating he/she has the financial resources to support himself/herself through the completion of the training? <input type="checkbox"/> Yes <input type="checkbox"/> No	

9. Training Weeks		
Training weeks completed: <input style="width: 50px;" type="text"/>	Training weeks being added: <input style="width: 50px;" type="text"/>	Total training weeks: <input style="width: 50px;" type="text"/>
With the Modification, the participant will complete training within the allowable 130 weeks utilizing Trade funding? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A		
If No, explain: <input style="width: 100px;" type="text"/>		

10. Certification & Affidavit	
Notice of Certification: I certify that the preceding information is correct to the best of my knowledge and that there is no intent to commit fraud.	
Participant Signature: <input style="width: 150px;" type="text"/>	Date: <input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/>
AFFIDAVIT	
I certify that the preceding information is correct to the best of my knowledge and that there is no intent to commit fraud. I hereby acknowledge that the information contained in this form that I am attesting to is complete and accurate and that the documentation described in the form is contained in the participant's file.	
10. Career Planner Signature: <input style="width: 150px;" type="text"/>	Date: <input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/> / <input style="width: 50px;" type="text"/>

Click on **List TAA Status** on the **Application Menu** on the **TAA Application** for the participant.

Application Menu

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

Printable Application

Application

- Guided Application
- Application Definition
- Assessment Summary
- TAA Training Criteria
- TAA Additional Info
- Concurrent Programs
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- List TAA Status**
- List IDES view

Profile

- Contact Information
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- Veterans Information
- Employment History
- Credentials
- Education Status - In Program Update
- Measurable Skill Gains
- List All Documents
- Create TAA Template

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click on **View** for the **IEP Status Record**.

List TAA Status

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

Add TAA Status Return

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
View	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
View	02/13/2019		IEP	Approved	Sheila Sloan	02/25/2019

Add TAA Status Return

Update the **IEP Status Record** with a dated comment in the **Comment Box** describing the reason for the modification.

Click **Save**.

Case Management

Maintain TAA Status

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

TAA Petition Number: 90900 **TAA Act:** 2015
Employer Name: Caterpillar

Status: IEP
Entry Date: 02/22/2019
Status Start Date: ×
Status End Date:

Changes to Comments or IEP Amount Approved require DCEO Approval

Comments:

IEP Amount Approved:

Created By: Sheila Sloan **Date Created:** 02/22/2019
Last Updated By: Sheila Sloan **Date Last Updated:** 02/25/2019

Approval Type	Approver	Approved/Denied Date	Approval Status	Previous IEP Amount
Original	Sheila Sloan	02/25/2019	Approved	

Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
There is nothing to display.					

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.

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](#)

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

Application

- [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](#)
- [List IDES View](#)

Profile

- [Contact Information](#)
- [Additional Contacts](#)
- [Private Information](#)
- [Veterans Information](#)
- [Employment History](#)
- [Credentials](#)
- [Education Status - In Program Update](#)
- [Measurable Skill Gains](#)
- [List All Documents](#)
- [Create TAA Template](#)

Services

- [List Enrolled Services](#)
- [List Part Time/Distance Learning](#)

Exit

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

Click on Trade Case Management – TAA.

 **IWDS** Illinois Workforce Development System **Case Management**

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

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

Page 1 of 1

Click **Add Additional Episode**.

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

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 adding an Additional Episode 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.

[Search Applications](#)
[Home](#)
[IWS](#)
[Illinois Workforce Development System](#)
[User Manual](#)
[Product, Employment &...](#)
[State Offices, TAA Contact](#)
[Suggested Sites](#)

IWDS
Illinois Workforce Development System
Case Management

Menu

[Staff Menu](#)

[Customer Menu](#)

[Application Menu](#)

Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

AQs

[Home Done: Log Off](#)

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	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

Page 1 of 1

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. An "Exit" section contains links for Exit Summary, View Wages, and Performance Impact.

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



Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

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
11/01/2021	11/01/2021	Career Planning (Case Management) - IDC	Successful Completion	Sheila Sloan

Page 1 of 1

Click **Add Additional Episode**.



Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

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.

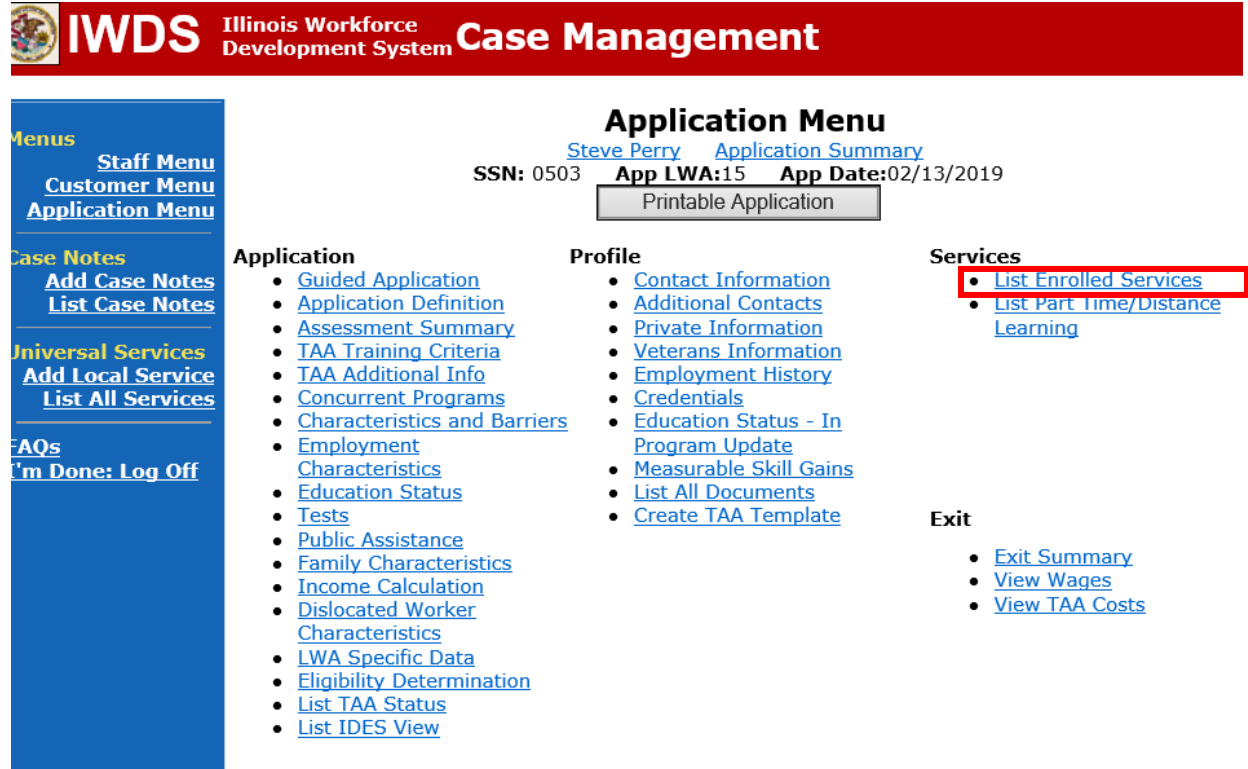
Add Case Note
[Steve Perry](#) [Application Summary](#)
Staff Name: [Sheila Sloan](#)

*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

Enter a **Job Search Allowance Service Record** in IWDS.

Click **List Enrolled Services** 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 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". A "Printable Application" button is visible. The interface is divided into several sections: "Application", "Profile", "Services", and "Exit". The "Services" section contains a list of options, with "List Enrolled Services" highlighted by a red box. A left-hand navigation menu is also present, containing sections for "Menus", "Case Notes", "Universal Services", and "FAQs".

Menus

- Staff Menu
- Customer Menu
- Application Menu

Case Notes

- Add Case Notes
- List Case Notes

Universal Services

- Add Local Service
- List All Services

FAQs

I'm Done: Log Off

Application Menu

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

Application

- 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
- List IDES View

Profile

- Contact Information
- Additional Contacts
- Private Information
- Veterans Information
- Employment History
- Credentials
- Education Status - In Program Update
- Measurable Skill Gains
- List All Documents
- Create TAA Template

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click **Add Enrolled Service**.

 **IWDS** Illinois Workforce Development System **Case Management**


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
12/15/2021	12/15/2021	Payable Training Interruption - TAA	Successful Completion	Sheila Sloan
12/10/2021		On-The-Job Training - TAA	Pending Approval	Sheila Sloan
12/08/2021		RTAA Registrant - TAA	Open	Sheila Sloan
12/01/2021	12/01/2021	Occupational Skills Training - TAA	UnSuccessful Completion	Sheila Sloan
12/01/2021	12/01/2021	Travel in Training - TAA	UnSuccessful Completion	Sheila Sloan
12/01/2021		Prerequisite Training - TAA	Open	Sheila Sloan
12/01/2021		Remedial Training - TAA	Open	Sheila Sloan
11/01/2021	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
10/25/2020	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan

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Select **TAA** from the drop down for **Title**.
Click **Next**.

 **IWDS** Illinois Workforce Development System **Case Management**

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

*Title: ▼

Select **Job Search** from the drop down for **Service Level**.
Enter the **Start Date** of the service.
Click **Next**.

The screenshot shows the IWDS Case Management interface. The header is a red bar with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: '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'. The main content area is titled 'Select Service Level and Start Date'. It includes links for 'Steve Perry' and 'Application Summary', and displays 'SSN: 0503 App LWA:15 App Date:02/13/2019'. The 'Title' is 'TAA'. The '*Service Level' dropdown is set to 'Job Search'. The '*Start Date' is '01/05/2022'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Select **Job Search Allowance** from the drop down for **Activity**.
Click **Next**.

The screenshot shows the IWDS Case Management interface. The header is a red bar with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: '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'. The main content area is titled 'Select Activity'. It includes links for 'Steve Perry' and 'Application Summary', and displays 'SSN: 0503 App LWA:15 App Date:02/13/2019'. The 'Title' is 'TAA'. The 'Service Level' is 'Job Search'. The '*Activity' dropdown is set to 'Job Search Allowance'. The 'Start Date' is '01/05/2022'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Click **Search Providers** to select the provider of the service.

IWDS Illinois Workforce Development System **Case Management**

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Search
Activity: Job Search Allowance **Same Day Service**
***Grant:** 17661015-United Workforce Development Board aka Career Link ▼

Provider: * * **Search Providers**

Start Date: 01/05/2022
End Date:
Current Status: Pending Approval
***Supports Bridge Program?:** No ▼

Comments:

TAA Services Completed: *Click Confirm when all TAA Services have been completed*

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

Click **Show All**, OR
 Enter the **Provider Relationship Name** (if known) and click **Search**.

Menus
[Staff Menu](#)
[Customer Menu](#)
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Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

Search Provider Relationships

Provider Relationship Name:

Relationship Number: -

Statutory Program: TAA/NAFTA
Title: TAA
Service Level: Job Search
Activity: Job Search Allowance
Start Date: 01/05/2022

Click **Pick** next to the provider of the service.

Menus
[Staff Menu](#)
[Customer Menu](#)
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Case Notes
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Universal Services
[Add Local Service](#)
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List Provider Relationships

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	Provider Name	Relationship ID	Relationship Type
<input type="button" value="Pick"/>	AAAAA Beauty Academy	1586-00	Vendor
<input type="button" value="Pick"/>	Bradley University	1537-00	Vendor
<input type="button" value="Pick"/>	Capital Area Career Center	1571-00	Contract

Page 1 of 2

The provider information has been added.
Click **Save**. This will set the record to a pending approval status.

IWDS Illinois Workforce Development System **Case Management**

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Search
Activity: Job Search Allowance **Same Day Service**
***Grant:** 17661015-United Workforce Development Board aka Career Link
Provider: *1537-00 Bradley University *
Start Date: 01/05/2022
End Date:
Current Status: Pending Approval
***Supports Bridge Program?:** No
Comments:

TAA Services Completed: *Click Confirm when all TAA Services have been complete*

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)


FAQs
[I'm Done: Log Off](#)

Upload the IEP, the Job Search Application and any other relevant documents in IWDS.

To upload documents in IWDS, click on **List All Documents** under the **Profile** section on the **Application Menu** on the **TAA 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 categories: "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". A "Printable Application" button is visible. The interface is divided into three columns: "Application" (with links like 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), "Profile" (with links like Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents (highlighted with a red box), and Create TAA Template), and "Services" (with links like List Enrolled Services and List Part Time/Distance Learning). An "Exit" section at the bottom right contains links for Exit Summary, View Wages, and View TAA Costs.

Click **Add Document**.

 **IWDS** Illinois Workforce Development System **Case Management**

Menus

[Staff Menu](#)

[Customer Menu](#)

[Application Menu](#)

Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

FAQs

[I'm Done: Log Off](#)

List All Documents

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

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

	Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
<input type="button" value="Remove"/>	Z1	Application Menu	Form #014 DCEO/Trade Trade Individual Employment Plan	Tue May 25 13:25:10 CDT 2021		

Click **Browse** to search for the document to upload. Once you find the file, double click the document or select it and click **Open**.

Then select the **Type** from the drop down options. There should be an option to select any of the Trade forms.

Each document can be uploaded separately or combined into a single document. If you upload the documents as one single document, select **Form #014 DCEO/Trade Individual Employment Plan** as the **Type**. If you upload the documents as separate documents, select the appropriate name from the drop down options for **Type**.

IWDS Illinois Workforce Development System **Case Management**

Upload Document

Path: Browse...

Type:

- Form #001 2021R Trade Benefits Rights and Obligations
- Form #002 DCEO/Trade Trade Application
- Form #003 DCEO/TAA 2002 TAA Illinois Waiver from Training
- Form #003 DCEO/TAAEA 2011 TAAEA Illinois Waiver from Training
- Form #003 DCEO/TAARA Illinois Waiver from Training
- Form #003 DCEO/TGAAA 2009 TGAAA Illinois Waiver from Training
- Form #003 2021R Illinois Waiver from Training
- Form #003a DCEO/Trade Trade Waiver Termination Letter
- Form #003b DCEO/Trade Trade Waiver Non-Compliance Letter
- Form #003c DCEO/Trade Trade Potential Suspension Letter
- Form #003d DCEO/Trade Trade Waiver Revocation Letter
- Form #003e DCEO/Trade Trade Waiver from Training Fact Sheet
- Form #004 DCEO/TAA TAA Bona Fide Application for Training
- Form #004 DCEO/TAA2014R Bona Fide Application for Training
- Form #004 2021R Trade Bona Fide Application for Training
- Form #005 DCEO/Trade Eligibility Determination for Trade Transportation/Subsistence Assistance
- Form #005 DCEO/Trade Eligibility Determination for Trade Travel Assistance
- Form #006 DCEO/Trade Verification of Trade Training Enrollment
- Form #006 DCEO/TAAEA Verification of TAAEA Training Enrollment
- Form #006 DCEO/TAA2014R Verification of Training Enrollment
- Form #006 DCEO/TGAAA Verification of TGAAA Training Enrollment
- Form #006a DCEO/Trade Bi-Weekly Verification of Trade Training Attendance
- Form #006b DCEO/Trade Trade Training Requirements Fact Sheet
- Form #006c DCEO/Trade Training Benchmark Warning Letter
- Form #006c DCEO/TAAEA TAAEA Training Benchmark Warning Letter
- Form #006d DCEO/Trade Training Program Tracking Form
- Form #006e DCEO/Trade Training Program Course Tracking Form
- Form #007 DCEO/Trade Trade Individual Training Account (ITA) Projection
- Form #008 DCEO/Trade Trade On-the-Job Training OJT Agreement
- Form #009 DCEO/Trade Trade On-the-Job Training OJT Invoice

Send an email request to state merit staff for approval using the following format (if it is a modification, forward the last state merit staff approval):

Email Subject Line: New IEP or IEP Modification and Job Search Approval Request –
“Participant First Name Initial and Participant Last Name” – LWIA XX

Body of Email:

Can we have a New IEP or IEP Modification and Job Search Approval for:

Participant Name:

Job Search Begin Date:

Job Search End Date:

Justification Statement:

State merit staff will do the following:

- 1) Review the email, IWDS entries, and uploaded documents to ensure all entries are made as required and all documents are complete.
- 2) If issues are found, state merit staff will email the career planner and inform him/her of the issues that need addressed.
- 3) Once the issues have been addressed, the career planner will forward back the email from state merit staff and note that issues have been addressed.
- 4) State merit staff will review corrections.
- 5) Once all issues have been corrected, state merit staff will approve all service and status records and forward the email chain to the career planner to inform him/her approval.
- 6) If approval is not possible and the request is denied, state merit staff will direct the career planner on the next steps to take.

Once the participant has completed the **Job Search**, a **Job Search Reconciliation** must be completed.

To enter a Reconciliation of a Job Search Allowance, the career planner will do the following:

Complete a **Reconciliation of Trade Job Search Allowance Commerce/Trade Form #012a (Job Search Reconciliation)**.

Complete the **Individual Employment Plan Modification Form Commerce/Trade IEP Modification Form #014a (IEP Modification Form)**.

Fill out all necessary information. Mark the **Additional service(s)** and enter **Job Search Allowance Reconciliation** in the List Service(s) box.

TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM

Pre-Approved Modification to Plan			
1. Participant Name: <input type="text"/>		2. Modification #: <input type="text"/>	
3. Date of Modification Request: <input type="text"/>		4. Date Modification to Take Effect: <input type="text"/>	
5. Reason for Modification: (select all that apply and complete information for the reason) NOTE: Some modifications may require submission of a new and/or updated Trade forms.			
<input type="checkbox"/> Invoking Equitable Tolling Justification: <input type="text"/>			
<input type="checkbox"/> Waiver Change: <input type="text"/>		<input type="checkbox"/> Criteria Change <input type="text"/>	
<input type="checkbox"/> Date Extension <input type="text"/>		<input type="checkbox"/> Revocation <input type="text"/>	
<input type="checkbox"/> Additional service(s) List Service(s): <input type="text"/>		<input type="checkbox"/> End Service List Service(s): <input type="text"/>	
<input type="checkbox"/> Date Extension Reason: <input type="text"/> Current End Date: <input type="text"/> New End Date: <input type="text"/>		<input type="checkbox"/> Switch to a New Training Program Reason: <input type="text"/> Current Training Institution: <input type="text"/> Current Training Program: <input type="text"/> New Training Institution: <input type="text"/> New Training Program: <input type="text"/>	
<input type="checkbox"/> Changes in Cost Reason: <input type="text"/>		<input type="checkbox"/> Change in Full-Time/Part-Time Status Reason: <input type="text"/>	
<input type="checkbox"/> Potential Suspension Start Date: <input type="text"/>		<input type="checkbox"/> Switch in On-Site/Online Status	
<input type="checkbox"/> Vacation Break Start Date: <input type="text"/> End Date: <input type="text"/>		<input type="checkbox"/> Final Cost Reconciliation <input type="checkbox"/> Other <input type="text"/>	
<input type="checkbox"/> Switch from Transportation to Subsistence		<input type="checkbox"/> Switch from Subsistence to Transportation	
6. How does the modification affect the total IEP cost?			
Increase \$ <input type="text"/>	Decrease \$ <input type="text"/>	<input type="checkbox"/> No Change	New Total IEP Amount \$ <input type="text"/>
7. Documentation to support Modification: (Mark all that apply)			
<input type="checkbox"/> Training institution documentation		<input type="checkbox"/> Participant documentation/request	
<input type="checkbox"/> File Audit <input type="text"/>			
<input type="checkbox"/> Other: List documentation: <input type="text"/>			
8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)			
Number of TRA weeks paid: <input type="text"/>		Number of eligible TRA weeks remaining: <input type="text"/>	
With this modification, the participant has enough remaining weeks of TRA eligibility to complete the training? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If no, has the participant provided documentation demonstrating he/she has the financial resources to support himself/herself through the completion of the training? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Click on **List TAA Status** on the **Application Menu** on the **TAA Application** for the participant.

Click on **View** for the **IEP Status Record**.

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
View	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
View	02/13/2019		IEP	Approved	Sheila Sloan	02/25/2019

Update the **IEP Status Record** with a dated comment in the **Comment Box** describing the reason for the modification.

Click **Save**.

Case Management

Menus

[Staff Menu](#)

[Customer Menu](#)

[Application Menu](#)

Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

FAQs

[I'm Done: Log Off](#)

Maintain TAA Status

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

TAA Petition Number: 90900 **TAA Act:** 2015
Employer Name: Caterpillar

Status: IEP
Entry Date: 02/22/2019
Status Start Date: ×
Status End Date:

Changes to Comments or IEP Amount Approved require DCEO Approval

Comments: 2/13/19 - Establishing IEP for customer Steve Perry.

IEP Amount Approved:

Created By: Sheila Sloan **Date Created:** 02/22/2019
Last Updated By: Sheila Sloan **Date Last Updated:** 02/25/2019

Approval Type	Approver	Approved/Denied Date	Approval Status	Previous IEP Amount
Original	Sheila Sloan	02/25/2019	Approved	

Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
There is nothing to display.					

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.

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](#)

Services

- [List Enrolled Services](#)
- [List Part Time/Distance Learning](#)

Exit

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

Click on Trade Case Management – TAA.

**IWDS** Illinois Workforce Development System **Case Management**

Services

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

3 found Page 1 of 1

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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Menus
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Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
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FAQs
[I'm Done: Log Off](#)

Click **Add Additional Episode**.

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

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 Case Note text area containing '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.

[Search Applications](#)
[Home](#)
[IWS](#)
[Illinois.gov Home](#)
[Federal Notes](#)
[Industry, Employment &...](#)
[State Offices, TAA Contact](#)
[Suggested Sites](#)

IWDS
Illinois Workforce Development System
Case Management

Menu

[Staff Menu](#)

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Case Notes

[Add Case Notes](#)

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Universal Services

[Add Local Service](#)

[List All Services](#)

AQs

[Home Done: Log Off](#)

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	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

Page 1 of 1

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. An "Exit" section contains links for Exit Summary, View Wages, and Performance Impact.

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

IWDS Illinois Workforce Development System **Case Management**

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

Add Enrolled Service Printable Services Return

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	Career Planning (Case Management) - 1DC	Successful Completion	Sheila Sloan

Page 1 of 1

Add Enrolled Service Printable Services Return

Click Add Additional Episode.

IWDS Illinois Workforce Development System **Case Management**

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: 1DC
Service Level: Career Services
Activity: Career Planning (Case Management) **Same Day Service**
*Grant: 19681015-United Workforce Development Board aka Career Link
Provider: *1537-00 Bradley University
Start Date: 11/01/2021
End Date: 11/01/2021
Current Status: Successful Completion
Comments: 11/1/2021 - Add Dated Comment

Additional Info
Add Additional Episode

Save Cancel

Delete Service

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.

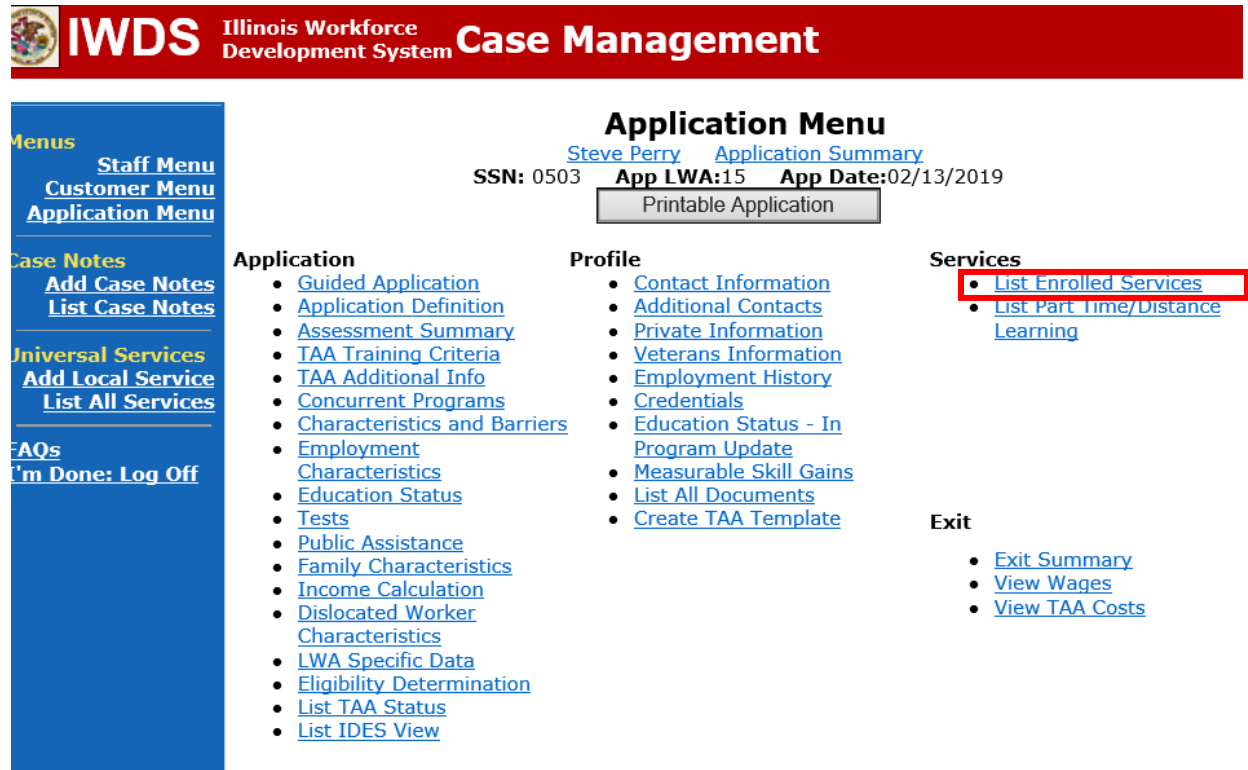
Case Note – Enter a detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. At the top, a red header 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 adding an Additional Episode to a Same Day Service. Below this is the 'Add Case Note' form, which includes fields for 'Contact Date' (11/01/2021), 'Program' (WIOA), 'Note Category' (Case Note Supporting Same Day Service), 'Confidential' (No), 'Note Subject' (Case Management), and 'Case Note' (11/1/21 Case Management for participant). A 'Save and Return' button is located at the bottom of the form.

Enter a **Job Search Allowance Reconciliation Service Record** in IWDS.

Click **List Enrolled Services** 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 title is "Application Menu". The user's name "Steve Perry" and "Application Summary" are displayed. The SSN is 0503, App LWA is 15, and App Date is 02/13/2019. There is a "Printable Application" button. The left sidebar contains several menu categories: "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 is divided into three columns: "Application", "Profile", and "Services". The "Services" column has a red box around the "List Enrolled Services" link. The "Exit" column contains links for "Exit Summary", "View Wages", and "View TAA Costs".

Menus
Staff Menu
Customer Menu
Application Menu

Case Notes
Add Case Notes
List Case Notes

Universal Services
Add Local Service
List All Services

FAQs
I'm Done: Log Off

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

Application

- [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](#)
- [List IDES View](#)

Profile

- [Contact Information](#)
- [Additional Contacts](#)
- [Private Information](#)
- [Veterans Information](#)
- [Employment History](#)
- [Credentials](#)
- [Education Status - In Program Update](#)
- [Measurable Skill Gains](#)
- [List All Documents](#)
- [Create TAA Template](#)

Services

- [List Enrolled Services](#)
- [List Part Time/Distance Learning](#)

Exit

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

Click **Add Enrolled Service**.

IWDS Illinois Workforce Development System **Case Management**

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

Add Enrolled Service Printable Services Return

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Start Date	End Date	Service Provided	Status	Created By
12/15/2021	12/15/2021	Payable Training Interruption - TAA	Successful Completion	Sheila Sloan
12/10/2021		On-The-Job Training - TAA	Pending Approval	Sheila Sloan
12/08/2021		RTAA Registrant - TAA	Open	Sheila Sloan
12/01/2021	12/01/2021	Occupational Skills Training - TAA	UnSuccessful Completion	Sheila Sloan
12/01/2021	12/01/2021	Travel in Training - TAA	UnSuccessful Completion	Sheila Sloan
12/01/2021		Prerequisite Training - TAA	Open	Sheila Sloan
12/01/2021		Remedial Training - TAA	Open	Sheila Sloan
11/01/2021	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
10/25/2020	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan

Page 1 of 2 Next Page >

Add Enrolled Service Printable Services Return

Select **TAA** from the drop down for **Title**.
Click **Next**.

IWDS Illinois Workforce Development System **Case Management**

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

*Title: ▾

< Back Next >

Cancel

Select **Job Search** from the drop down for **Service Level**.
Enter the **Start Date** of the service.
Click **Next**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with sections: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), and 'Universal Services' (Add Local Service, List All Services). The main content area is titled 'Select Service Level and Start Date'. It displays user information: 'Steve Perry Application Summary', 'SSN: 0503 App LWA:15 App Date:02/13/2019', and 'Title: TAA'. The 'Service Level' dropdown is set to 'Job Search' and the 'Start Date' is '01/05/2022'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Select **Job Search Allowance – Reconciliation** from the drop down for **Activity**.
Click **Next**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with sections: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), and 'Universal Services' (Add Local Service, List All Services). The main content area is titled 'Select Activity'. It displays user information: 'Steve Perry Application Summary', 'SSN: 0503 App LWA:15 App Date:02/13/2019', and 'Title: TAA'. The 'Service Level' is 'Job Search' and the '*Activity' dropdown is set to 'Job Search Allowance - Reconciliation'. The 'Start Date' is '01/05/2022'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Click **Search Providers** to select the provider of the service.

IWDS Illinois Workforce Development System **Case Management**

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Search
Activity: Job Search Allowance - Reconciliation
***Grant:** 17661015-United Workforce Development Board aka Career Link

Provider: * * Search Providers

Start Date: 01/05/2022
End Date:
Current Status: Pending Approval
Comments:

TAA Services Completed: Confirm Click Confirm when all TAA Services have been completed

Additional Info

< Back

Save Cancel

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

Click **Show All**, OR

Enter the **Provider Relationship Name** (if known) and click **Search**.

IWDS Illinois Workforce Development System **Case Management**

Search Provider Relationships

Show All

Provider Relationship Name:
Relationship Number: -
Statutory Program: TAA/NAFTA
Title: TAA
Service Level: Job Search
Activity: Job Search Allowance - Reconciliation
Start Date: 01/05/2022

Search Return

Menus
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Universal Services
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[I'm Done: Log Off](#)

Click **Pick** for the provider of the service.

Case Management

List Provider Relationships

Return To Search

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	Provider Name	Relationship ID	Relationship Type
Pick	AAAAA Beauty Academy	1586-00	Vendor
Pick	Bradley University	1537-00	Vendor
Pick	Capital Area Career Center	1571-00	Contract

Page 1 of 2 Next Page >

Return To Search

Click **Save**. This sets the record to a pending status.

Case Management

Add Required Activity Information

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Search
Activity: Job Search Allowance - Reconciliation
*Grant: [17661015-United Workforce Development Board aka Career Link](#) ▼
Provider: *[1537-00 Bradley University](#) * Search Providers
Start Date: 01/05/2022
End Date:
Current Status: Pending Approval
Comments:

TAA Services Completed: Confirm Click Confirm when all TAA Services have been completed

< Back Additional Info


Save Cancel

Upload the **IEP Modification Form**, the **Job Search Reconciliation** and any other relevant documents in IWDS.

To upload documents in IWDS, click on **List All Documents** under the **Profile** section on the **Application Menu** on the **TAA 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 on the left 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 App Date:02/13/2019", and a "Printable Application" button. The menu is organized into three columns: "Application" (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, List IDES View), "Profile" (Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents, Create TAA Template), and "Services" (List Enrolled Services, List Part Time/Distance Learning). An "Exit" section at the bottom right includes Exit Summary, View Wages, and View TAA Costs. The "List All Documents" link in the Profile section is highlighted with a red box.

Click **Add Document**.

 **IWDS** Illinois Workforce Development System **Case Management**

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

List All Documents

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

	Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
<input type="button" value="Remove"/>	Z1	Application Menu	Form #014 DCEO/Trade Trade Individual Employment Plan	Tue May 25 13:25:10 CDT 2021		

Click **Browse** to search for the document to upload. Once you find the file, double click the document or select it and click **Open**.

Then select the **Type** from the drop down options. There should be an option to select any of the Trade forms.

Each document can be uploaded separately or combined into a single document. If you upload the documents as one single document, select **Form #014 DCEO/Trade Individual Employment Plan** as the **Type**. If you upload the documents as separate documents, select the appropriate name from the drop down options for **Type**.

IWDS Illinois Workforce Development System **Case Management**

Upload Document

Path: Browse...

Type:

- Form #001 2021R Trade Benefits Rights and Obligations
- Form #002 DCEO/Trade Trade Application
- Form #003 DCEO/TAA 2002 TAA Illinois Waiver from Training
- Form #003 DCEO/TAAEA 2011 TAAEA Illinois Waiver from Training
- Form #003 DCEO/TAARA Illinois Waiver from Training
- Form #003 DCEO/TGAAA 2009 TGAAA Illinois Waiver from Training
- Form #003 2021R Illinois Waiver from Training
- Form #003a DCEO/Trade Trade Waiver Termination Letter
- Form #003b DCEO/Trade Trade Waiver Non-Compliance Letter
- Form #003c DCEO/Trade Trade Potential Suspension Letter
- Form #003d DCEO/Trade Trade Waiver Revocation Letter
- Form #003e DCEO/Trade Trade Waiver from Training Fact Sheet
- Form #004 DCEO/TAA TAA Bona Fide Application for Training
- Form #004 DCEO/TAA2014R Bona Fide Application for Training
- Form #004 2021R Trade Bona Fide Application for Training
- Form #005 DCEO/Trade Eligibility Determination for Trade Transportation/Subsistence Assistance
- Form #005 DCEO/Trade Eligibility Determination for Trade Travel Assistance
- Form #006 DCEO/Trade Verification of Trade Training Enrollment
- Form #006 DCEO/TAAEA Verification of TAAEA Training Enrollment
- Form #006 DCEO/TAA2014R Verification of Training Enrollment
- Form #006 DCEO/TGAAA Verification of TGAAA Training Enrollment
- Form #006a DCEO/Trade Bi-Weekly Verification of Trade Training Attendance
- Form #006b DCEO/Trade Trade Training Requirements Fact Sheet
- Form #006c DCEO/Trade Training Benchmark Warning Letter
- Form #006c DCEO/TAAEA TAAEA Training Benchmark Warning Letter
- Form #006d DCEO/Trade Training Program Tracking Form
- Form #006e DCEO/Trade Training Program Course Tracking Form
- Form #007 DCEO/Trade Trade Individual Training Account (ITA) Projection
- Form #008 DCEO/Trade Trade On-the-Job Training OJT Agreement
- Form #009 DCEO/Trade Trade On-the-Job Training OJT Invoice

Send an email request to state merit staff for approval using the following format (if it is a modification, forward the last state merit staff approval):

Email Subject Line: IEP Modification and Reconciliation of a Job Search Approval Request – “Participant First Name Initial and Participant Last Name” – LWIA XX

Body of Email:

Can we have an IEP Modification for Reconciliation of a Job Search Approval for:

Participant Name:

Job Search Begin Date:

Job Search End Date:

Justification Statement:

State merit staff will do the following:

- 1) Review the email, IWDS entries, and uploaded documents to ensure all entries are made as required and all documents are complete.
- 2) If issues are found, state merit staff will email the career planner and inform him/her of the issues that need addressed.
- 3) Once the issues have been addressed, the career planner will forward back the email from state merit staff and note that issues have been addressed.
- 4) State merit staff will review corrections.
- 5) Once all issues have been corrected, state merit staff will approve all service and status records and forward the email chain to the career planner to inform him/her approval.
- 6) If approval is not possible and the request is denied, state merit staff will direct the career planner on the next steps to take.