

RECORDING 30-DAY WAIVER REVIEWS

NOTE: The participant information on the IWDS screens in this document is not an actual person.

To record the Waiver review, the career planner will do the following:

Select **List TAA Status** under the **Application** section of the **Application Menu** for the **Trade 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 "Application" section contains a list of menu items, with "List TAA Status" highlighted by a red box. The "Profile" section includes links for contact information, private information, veterans information, employment history, credentials, education status, measurable skill gains, and creating a TAA template. The "Services" section includes links for enrolled services and part-time/distance learning. The "Exit" section includes links for exit summary, view wages, and view TAA costs. On the left side, there is a blue sidebar menu with options like "Staff Menu", "Customer Menu", "Case Notes", "Universal Services", and "FAQs".

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](#)

Menu
[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 **View** for the **Waiver from Training Requirement Status Record**.

IWDS Illinois Workforce Development System Case Management

List TAA Status
[Steve Perry](#) [Application Summary](#)
 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

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 **30 Day Review**.

IWDS Illinois Workforce Development System 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: Waiver from Training Requirement
 Entry Date: 02/25/2019
 Status Start Date: 02/13/2019
 Initial Status End Date: 04/14/2019
 Status End Date: 04/14/2019
 Waiver Reason: Training Not Available for Up to 60 Days

Extensions to Status End Date or Waiver Reason require DCEO Approval
 Comments: 2/13/19 - requesting waiver for customer because enrollment is not available at this time.

Qualifies Under 45 Day Extension: No
 Qualifies Under 60 Day Extension: No
 Qualifies Under Federal Good Cause Provision: No
 Qualifies Under Equitable Tolling: No

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

Save Return **30 Day Review** Part Time/Distance

Approval Type	Approver	Approved/Denied Date	Approval Status	Previous Waiver End Date
Original	Sheila Sloan	02/25/2019	Approved	

Save and List Approvals List Approvals

Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
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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 **Add 30 Day Review**

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

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

List 30 Day Reviews

Add 30 Day Review Printable 30 Day Reviews Return

1 found Page 1 of 1

	Review Date	Date Entered	Career Planner
View	02/25/2019	02/25/2019	Sheila Sloan

1 found Page 1 of 1

Add 30 Day Review Printable 30 Day Reviews Return

Enter the **Review Date**.

Select the **Method of Contact** from the drop down options: **In Person, Telephone, E-mail, Post Card/Mail, or Other**.

Select the appropriate **Outcome** from the drop down options: **Waiver continuation approved, Suspension request initiated, or Waiver revocation initiated**.

Enter **Comments**.

Click **Save**.

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

Maintain 30 Day Review

*Review Date:

Data Entry Date: 10/29/2021
Career Planner: Sheila Sloan

*Method of Contact:

*Outcome:

Comments:

Save 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.

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

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**

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
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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Add Enrolled Service Printable Services Return

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 “Waiver 30 Day Review” as the case note subject.

Case Note – Enter a detailed case note detailing the review, including if the conditions for the waiver are still valid.

Click **Save and Return**.

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". On the left, there is a blue sidebar menu with the following items: "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 has a yellow background with an "Informational Message" stating: "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." Below the message is the "Add Case Note" form. The form includes the following fields: "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 Services), and "*Case Note" (Provided Case Management Service to participant.). A "Save and Return" button is located at the bottom of the form.

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 "List Enrolled Services" link 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

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

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Add Enrolled Service Printable Services Return

Click Add Additional Episode.

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**.

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](#)

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

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

In instances where the participant fails to make contact for the 30 day review, utilize the following process to notify the participant of non-compliance with the mandatory review. Keep copies of all letters in the participant's file and upload in IWDS.

Complete the **Trade Form #003b Trade Waiver Non-Compliance Letter (Non-Compliance Letter)** marking the **1st Failure to Contact Career Planner for 30 Day Waiver Review as scheduled** box and send to the participant. This will notify the participant of the rescheduled 30 day review. The rescheduled review must occur within 7 calendar days.

Add a detailed **Case Note** by clicking on **Add Case Notes** on the **Application Menu** 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](#)

Enter the **Contact Date**.

Select **TAA/NAFTA** from the drop down options for **Program**:

Select the appropriate **Note Category** from the drop down options (for the six criterion case note).

Select **Yes** or **No** for **Confidential**. This should only be marked Yes if the case note contains information regarding confidential information regarding the participant such as medical

conditions, legal issues, or similar information. Confidential case notes cannot be viewed by trade merit staff or monitors.

Enter a **Note Subject**. This should be descriptive, such as Non-Compliance with 30 Day Review.

Enter the **Case Note**. Be detailed and descriptive.

Click **Save and Return**.

The screenshot shows the 'Add Case Note' form in the IWDS Case Management system. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. A blue sidebar on the left contains a 'Menus' section with links for Staff, Customer, and Application menus; a 'Case Notes' section with links to Add and List Case Notes; a 'Universal Services' section with links to Add Local Service and List All Services; and an 'FAQs' section with a 'Log Off' link. The main form area is titled 'Add Case Note' and includes links for 'Steve Perry' and 'Application Summary'. The 'Staff Name' is 'Sheila Sloan'. The form contains several required fields: '*Contact Date' (text input), 'Program' (dropdown menu), '*Note Category' (dropdown menu), '*Confidential' (dropdown menu with 'No' selected), '*Note Subject' (text input), and '*Case Note' (large text area with scrollbars). At the bottom, there are three buttons: 'Save, Add Another', 'Save and Return', and 'Cancel'.

If after 7 days the participant is unresponsive, complete the **Non-Compliance Letter** marking the **2nd Failure to Contact Career Planner for 30 Day Waiver Review as scheduled** box and send to the participant. This will notify the participant of the rescheduled 30 day review that must occur within 14 calendar days. This also warns the participant that he/she is jeopardizing eligibility for Trade/TRA/UI payments, HCTC eligibility, and facing potential revocation of the waiver, ending eligibility for TRA benefits.

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**

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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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 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 “Waiver 30 Day Review” as the case note subject.

Case Note – Enter a detailed case note detailing the review, including if the conditions for the waiver are still valid.

Click **Save and Return**.

The screenshot displays the IWDS 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: Staff Menu, Customer Menu, Application Menu, Case Notes (Add Case Notes, List Case Notes), Universal Services (Add Local Service, List All Services), FAQs, and Log Off. The main content area features a yellow informational message box stating that a Case Note is required for additional episodes and that clicking 'Save and Return' will update the Case Note and the Same Day 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 (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.

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, IFA Characteristics, List Part Time/Distance Learning). The "List Enrolled Services" link 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

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.

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. On the left is a blue navigation menu with links for Staff Menu, Customer Menu, Application Menu, Case Notes, Universal Services, and FAQs. The main content area features a yellow informational message, a title 'Add Case Note', and a form with fields for Contact Date, Program, Note Category, Confidential status, Note Subject, and Case Note. A 'Save and Return' button is located at the bottom of the form.

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

If the participant contacts the career planner within the 14 calendar days, the career planner will do the following:

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.

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 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, 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). 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 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

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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.

 **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](#)

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:** ▼

Provider: *1502-00 Carl Sandburg College

Start Date: 10/25/2020
End Date: 10/25/2020
Current Status: Successful Completion

***Weekly Hours:**

*** Bridge Program Activity?:** ▼

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 “Waiver 30 Day Review” as the case note subject.

Case Note – Enter a detailed case note detailing the review, including if the conditions for the waiver are still valid.

Click **Save and Return**.

The screenshot displays the IWDS 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: Staff Menu, Customer Menu, Application Menu, Case Notes (Add Case Notes, List Case Notes), Universal Services (Add Local Service, List All Services), FAQs, and Log Off. The main content area features a yellow informational message box stating: "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." Below this message is the "Add Case Note" form. The form includes the following fields: 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 Services), and Case Note (Provided Case Management Service to participant.). A "Save and Return" button is located at the bottom of the form.

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 this 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 includes the user name "Steve Perry" and a link to "Application Summary". It displays application details: "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. Below these 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

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

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Add Enrolled Service Printable Services Return

Click Add Additional Episode.

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, there is a red header with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left side, there is a blue navigation menu with the following items: '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: '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.' Below the message is the 'Add Case Note' form. The form includes the following fields: '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), and 'Case Note' (11/1/21 Case Management for participant). A 'Save and Return' button is located at the bottom of the form.

If the participant fails to contact the career planner within the 14 calendar days, follow the process outlined in **Chapter 9: Potential Suspension Requests (PSR) Non-Compliance with Trade Requirements Section**.

Following IDES adjudication of the **PSR**, contact state merit staff for further instructions.