

RELOCATION ALLOWANCE INSTRUCTIONS

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

Complete an **Application for Trade Relocation Allowance Commerce/Trade Form #013 (Relocation 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**.

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Case Notes
[Add Case Notes](#)
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Universal Services
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FAQs
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Select Title
[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

*Title: TAA ▾

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

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FAQs
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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:

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

IWDS Illinois Workforce Development System Case Management

Menu

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Edit Required Activity Information

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

Created By: Sheila Sloan
Date Created: 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**.

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Illinois Workforce Development System
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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

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 (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.				

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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 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 Title' and displays the user's name 'Steve Perry' and 'Application Summary' as links. Below this, it shows 'SSN: 0503 App LWA:15 App Date:02/13/2019'. The 'Title' field is a dropdown menu with 'TAA' selected. At the bottom, there 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 the same as in the previous screenshot. The main content area displays 'Steve Perry' and 'Application Summary' as links, followed by 'SSN: 0503 App LWA:15 App Date:02/13/2019'. The 'Title' field is now a text input containing 'TAA'. The '*Service Level' field is a dropdown menu with 'Employment and Case Management' selected. The '*Start Date' field is a text input containing '11/1/2021' with a clear 'x' button. At the bottom, there 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 the App Date is 02/13/2019. The form is populated with the following information: Created By: Sheila Sloan; 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: Search Providers; Start Date: 10/25/2020; End Date: (empty); Current Status: Open; Weekly Hours: (empty); Bridge Program Activity?: No. A large text area for comments is present but empty. 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 blue sidebar on the left contains navigation menus for Staff, Customer, and Application, as well as 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.

Search Provider Relationships

Show All

Provider Relationship Name:

Relationship Number: -

Statutory Program: TAA/NAFTA
Title: TAA
Service Level: Employment and Case Management
Activity: Trade Case Management
Start Date: 10/25/2020

Search Return

Click **Save**.

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: 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 * Search Providers
Start Date: 10/25/2020
*End Date: 10/25/2020
*Current Status: Successful Completion
*Weekly Hours: 5
* Bridge Program Activity?: No
Comments: 10/25/2020 Providing case management to participant.

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

< Back Additional Info Save 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 **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 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 (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.

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


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[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

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 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 **Add Enrolled Service**.

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.				

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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 navigation menu with links for Staff Menu, Customer Menu, Application Menu, Case Notes, and Universal Services. The main content area is titled 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays the user's SSN (0503), App LWA (15), and App Date (02/13/2019). The 'Title' is '1DC'. The '*Service Level' dropdown menu is set to 'Career Services'. 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 navigation menu with links for Staff Menu, Customer Menu, Application Menu, Case Notes, Universal Services, and FAQs. The main content area is titled 'Select Activity' and includes links for 'Steve Perry' and 'Application Summary'. It displays the user's SSN (0503), App LWA (15), and App Date (02/13/2019). The 'Title' is '1DC'. The 'Service Level' is 'Career Services'. The '*Activity' dropdown menu is set to 'Career Planning (Case Management)'. 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', 'Case Notes', 'Universal Services', and 'FAQs'. The main content area is titled 'Add Required Activity Information' and displays the following information:

- 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
- 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**.


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Menus

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Services

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

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

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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 **Relocation 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 style="width: 100%;" type="text"/>		<input type="checkbox"/> Criteria Change <input style="width: 100%;" type="text"/>	
<input type="checkbox"/> Date Extension <input style="width: 100%;" type="text"/>		<input type="checkbox"/> Revocation <input style="width: 100%;" type="text"/>	
<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 style="width: 100%;" type="text"/>	
<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 style="width: 100%;" type="text"/>	
<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: 		

8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)		
Number of eligible TRA weeks remaining: 	OR	TRA Exhaustion Date: / /
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: 	Training weeks being added: 	Total training weeks:
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: 		

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: 	Date: / /
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: 	Date: / /

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

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

Application

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Services

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Exit

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

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

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

Click **Save**.

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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: X

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

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Click **Add Additional Episode**.

Menus
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[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: "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 is the "Add Case Note" form, which 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.

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](#)

[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

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WIOA Application: No Entry.

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

Trade Application: No entry.

WIOA Application:

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

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

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

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



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

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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.

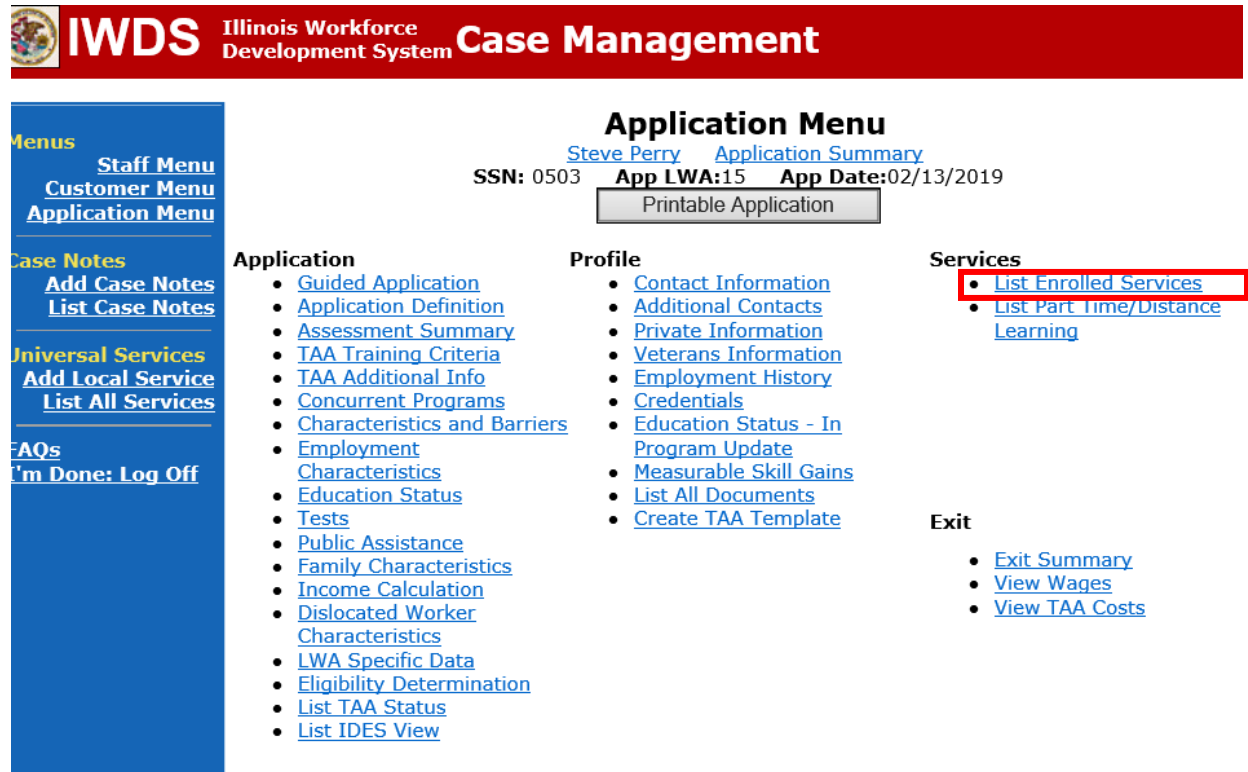
Add Case Note
[Steve Perry](#) [Application Summary](#)
Staff Name: [Sheila Sloan](#)

*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 **Relocation 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".

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](#)

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 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 **Relocation** 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 red 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 'Relocation'. The '*Start Date' is '1/5/22'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

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

The screenshot shows the IWDS Case Management interface. The header is red 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 'Relocation'. The '*Activity' dropdown is set to 'Relocation 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.

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](#)

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: Relocation

Activity: Relocation Allowance **Same Day Service**

***Grant:** 17661015-United Workforce Development Board aka Career Link

Provider: * *

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**

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

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FAQs

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

Search Provider Relationships

Provider Relationship Name:

Relationship Number: -

Statutory Program: TAA/NAFTA


Title: TAA

Service Level: Relocation

Activity: Relocation Allowance

Start Date: 01/05/2022

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



Menus

[Staff Menu](#)

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Case Notes

[Add Case Notes](#)

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Universal Services

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FAQs

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


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**

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

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: Relocation
Activity: Relocation Allowance Same Day Service
***Grant:** ▼
Provider: * *
Start Date: 01/05/2022
End Date:
Current Status: Pending Approval
***Supports Bridge Program?:** ▼
Comments:

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

Upload the **IEP Modification Form**, the **Relocation Allowance 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 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", and "App Date:02/13/2019". There is a "Printable Application" button. The menu is organized into three columns: "Application" (with 18 items), "Profile" (with 7 items, where "List All Documents" is highlighted with a red box), and "Services" (with 3 items). An "Exit" section is also present at the bottom right of the menu area.

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](#)
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- [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 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 Relocation Allowance 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 Relocation Allowance Approval for:

Participant Name:

Relocation Begin Date:

Relocation 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 Relocation, a **Relocation Allowance Reconciliation** must be completed.

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

Complete a **Reconciliation of Trade Relocation Allowance Commerce/Trade Form #013a (Relocation 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 **Relocation Allowance Reconciliation** in the List Service(s) box.

TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM



Modification Information	
1. Participant Name: <input style="width: 80%;" type="text"/>	2. Modification #: <input style="width: 80%;" type="text"/>
3. Date of Modification Request: <input style="width: 80%;" type="text"/>	4. Date Modification to Take Effect: <input style="width: 80%;" 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: 80%;" type="text"/> New End Date: <input style="width: 80%;" 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: 80%;" type="text"/> <input type="checkbox"/> Switch in On-Site/Online Status	
<input type="checkbox"/> Vacation Break Start Date: <input style="width: 80%;" type="text"/> End Date: <input style="width: 80%;" 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: 80%;" type="text"/>	Decrease \$ <input style="width: 80%;" type="text"/>	<input type="checkbox"/> No Change	New Total IEP Amount \$ <input style="width: 80%;" 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: _____		

8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)	
Number of eligible TRA weeks remaining: _____	OR TRA Exhaustion Date: ____/____/____
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: _____	Training weeks being added: _____	Total training weeks: _____
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: _____

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: _____	Date: ____/____/____
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: _____	Date: ____/____/____

Click on **List TAA Status** 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 IDLS 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 **View** for the **IEP 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

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:

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**

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
[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 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: '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 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.

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.

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

3 found Page 1 of 1

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

Add Enrolled Service Printable Services Return

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, there 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, there 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

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.

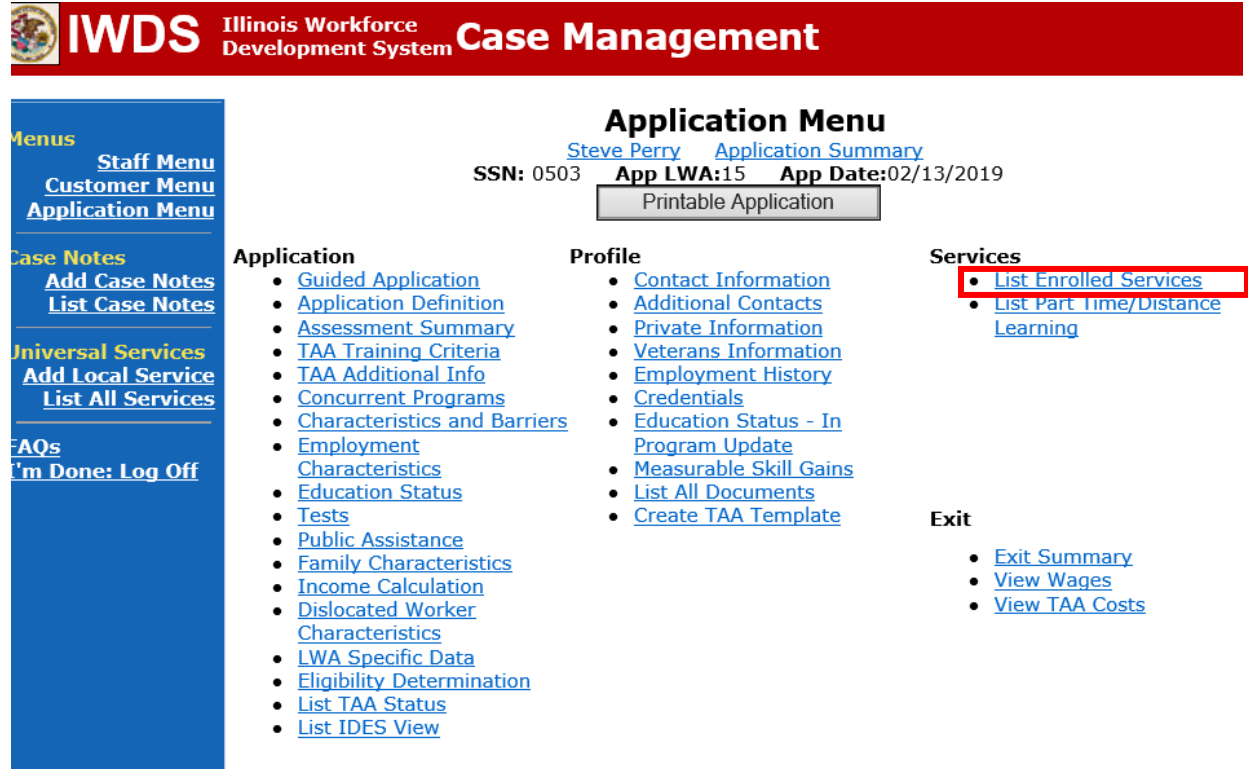
Case Note – Enter a detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. 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 **Relocation 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 information is "Steve Perry" and "Application Summary". 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 has links for "Exit Summary", "View Wages", and "View TAA Costs".

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 **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

11 found Page 1 of 2 Next Page >

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 **Relocation** 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 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 displays user information: 'Steve Perry' and 'Application Summary' (both links), 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. The 'Title' is 'TAA'. The '*Service Level:' dropdown is set to 'Relocation'. The '*Start Date:' text box contains '01/05/2022'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Select **Relocation 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 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 displays user information: 'Steve Perry' and 'Application Summary' (both links), 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. The 'Title' is 'TAA'. The 'Service Level:' is 'Relocation'. The '*Activity:' dropdown is set to 'Relocation Allowance - Reconciliation'. The 'Start Date:' text box contains '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: Relocation
Activity: Relocation 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

< Back Additional Info 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: Relocation
Activity: Relocation Allowance - Reconciliation
Start Date: 01/05/2022

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

IWDS Illinois Workforce Development System **Case Management**

List Provider Relationships

Return To Search

6 found Page 1 of 2 Next Page >

	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.

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: Relocation
 Activity: Relocation 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

Additional Info

< Back

Save Cancel

Upload the **IEP Modification Form**, the **Relocation 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", and "App Date:02/13/2019". There is a "Printable Application" button. The menu is organized into three columns: "Application" (with 17 items), "Profile" (with 7 items, where "List All Documents" is highlighted with a red box), and "Services" (with 3 items). An "Exit" section with 3 items is located at the bottom right.

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 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:

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 Relocation Allowance 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 Relocation Allowance Approval for:

Participant Name:

Reconciliation Begin Date:

Reconciliation 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.