

WORK-BASED TRAINING

The career planner will do the following for submission of requests to approve work-based training:

Complete a **Trade Individual Employment Plan Commerce/Trade Form #014 (IEP)**. See the recorded training dated 10/28/21 on Eligibility & Enrollment, Agent/Liable, and 2021R Program Differences and the IEP Form with Instructions for specific instructions on completing the IEP.

If this is the initial service (IEP not already state merit staff approved) for the participant:

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.

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 user's name "Steve Perry" and "Application Summary" are displayed. The user's SSN is 0503, App LWA is 15, and App Date is 02/13/2019. A "Printable Application" button is visible. The main content area is divided into three sections: "Application", "Profile", and "Services". The "Services" section is highlighted with a red box and contains a list of options, including "List Enrolled Services", "List Part Time/Distance Learning", and "Exit". The "Exit" section includes "Exit Summary", "View Wages", and "View TAA Costs". A left sidebar contains various menu options such as "Staff Menu", "Customer Menu", "Application Menu", "Case Notes", "Universal Services", and "FAQs".

Click **Add Enrolled Service**.

The screenshot shows the "Services" section of the IWDS Case Management interface. At the top, the user's name "Steve Perry" and "Application Summary" are displayed. The user's SSN is 0503, App LWA is 15, and App Date is 02/13/2019. Below this information, there are three buttons: "Add Enrolled Service", "Printable Services", and "Return". The "Add Enrolled Service" button is highlighted with a red box.

Select **TAA** from the drop down for the **Title**. Then 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: TAA ▾

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Cancel

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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](#)

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

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

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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Cancel

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[Customer Menu](#)
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Case Notes
[Add Case Notes](#)
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Universal Services
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Complete the information on the screen and click **Save**

[Home](#)
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[Add Case Notes](#)
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[Universal Services](#)
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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**.

Case Management

Maintain TAA Status

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

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

Status: IEP
 Entry Date: 02/22/2019
Status Start Date: 02/13/2019 X
 Status End Date:

Changes to Comments or IEP Amount Approved require DCEO Approval

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

IEP Amount Approved:

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

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

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

If this is an IEP modification (IEP already state merit staff approved) for the participant:
 Click on **List TAA Status** on the **Application Menu** on the **TAA Application** for the participant.

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

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

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

Click **Save**.

IWDS
Illinois Workforce Development System
Case Management

Menus

[Staff Menu](#)

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Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

FAQs

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

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.					


Update the paper **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 **Waiver** in the List Service(s) box.

TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM

Pre-Approved Modification to Plan

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

8 words  

Complete a **Trade Verification of Trade Training Enrollment Commerce/Trade Form #006 (Training Enrollment Form)**.

Complete a **Trade Eligibility Determination for Trade Transportation-Subsistence Commerce/Trade Form #005 (Transportation-Subsistence Form)** along with a Google Maps printout supporting the mileage distance between the residence and the training institution site, to determine eligibility for transportation-subsistence assistance.

Complete a **Trade Training Program Tracking Form Commerce/Trade Form #006d (Tracking Form)** or **Trade Training Program Course Tracking Form Commerce/Trade Form #006e (Tracking Form)**, as appropriate.

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.

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, 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 **Add Enrolled Service**.

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
There is nothing to display.				

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

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

*Title:

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**.



- Menus**
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 - [Customer Menu](#)
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- Case Notes**
 - [Add Case Notes](#)
 - [List Case Notes](#)
- Universal Services**
 - [Add Local Service](#)
 - [List All Services](#)
- FAQs**

Select Service Level and Start Date

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

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

Title: TAA

*Service Level:

*Start Date:

< Back

Next >

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 application number 0503 and date 02/13/2019. The form fields include: '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', and a 'Comments' text area. A 'Confirm' button is present with a red instruction: 'Click Confirm when all TAA Services have been completed'. Navigation buttons include '< Back', 'Additional Info', 'Save', and 'Cancel'. A left sidebar contains menu options like 'Staff Menu', 'Customer Menu', 'Application Menu', 'Case Notes', 'Universal Services', and 'FAQs'.

To Search Providers:

Click **Show All**

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

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 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. 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 Case Note text area containing "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**.

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

Page 1 of 1

Add Enrolled Service Printable Services Return

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.

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

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

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Click **Add Additional Episode**.

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[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**.

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: TAA/NAFTA ▾
***Note Category:** Case Note Supporting Same Day Service ▾
***Confidential:** No ▾
***Note Subject:** Case Management Services
***Case Note:** Provided Case Management Service to participant. |

Save and Return

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 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

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Add Enrolled Service Printable Services Return

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

WIOA Application: No entry.

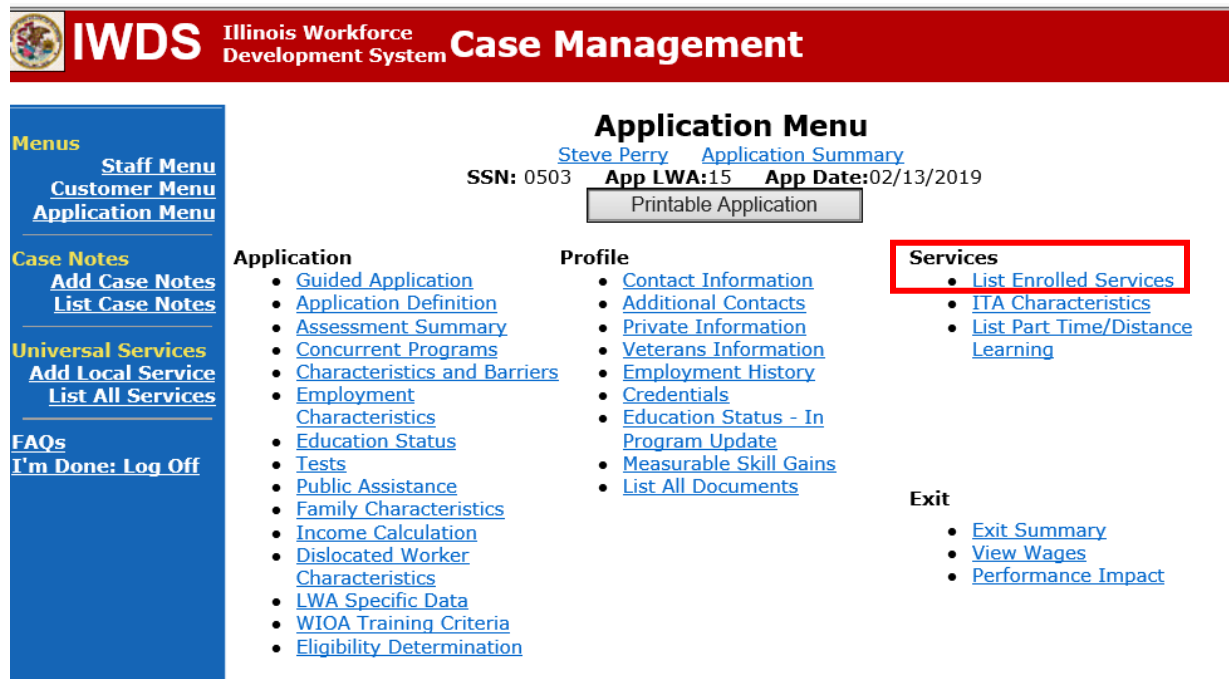
For those participants covered by certifications numbered 98,000+ (2021R):

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, 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 includes the user name "Steve Perry" and a link to "Application Summary". The user's SSN is 0503, the application LWA is 15, and the application date is 02/13/2019. A "Printable Application" button is visible. The left sidebar contains a "Menus" section with links for Staff, Customer, and Application menus, as well as Case Notes, Universal Services, and FAQs. The main content area is divided into three columns: "Application", "Profile", and "Services". The "Services" column is highlighted with a red box and contains the link "List Enrolled Services".

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
- 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

Services

- List Enrolled Services
- ITA Characteristics
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- 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.				

Page 1 of 1

Add Enrolled Service Printable Services Return

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

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

*Title: 1DC

< Back Next >

Cancel

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

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

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

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

Complete all required fields:

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

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

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

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

The screenshot shows the IWDS 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 includes the following fields and options:

- 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 *
- 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, 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: 'Informational Message: A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.' Below the message is the 'Add Case Note' form. The form includes the following fields: 'Staff Name: Sheila Sloan' (with links for 'Steve Perry' and 'Application Summary'), 'Contact Date: 11/01/2021', 'Program: WIOA' (dropdown menu), '*Note Category: Case Note Supporting Same Day Service' (dropdown menu), '*Confidential: No' (dropdown menu), '*Note Subject: Case Management' (text input), and '*Case Note: Provided case management to participant today.' (text area). 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**.

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) - IDC	Successful Completion	Sheila Sloan

Page 1 of 1

Add Enrolled Service Printable Services Return

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.

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](#)
- [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](#)

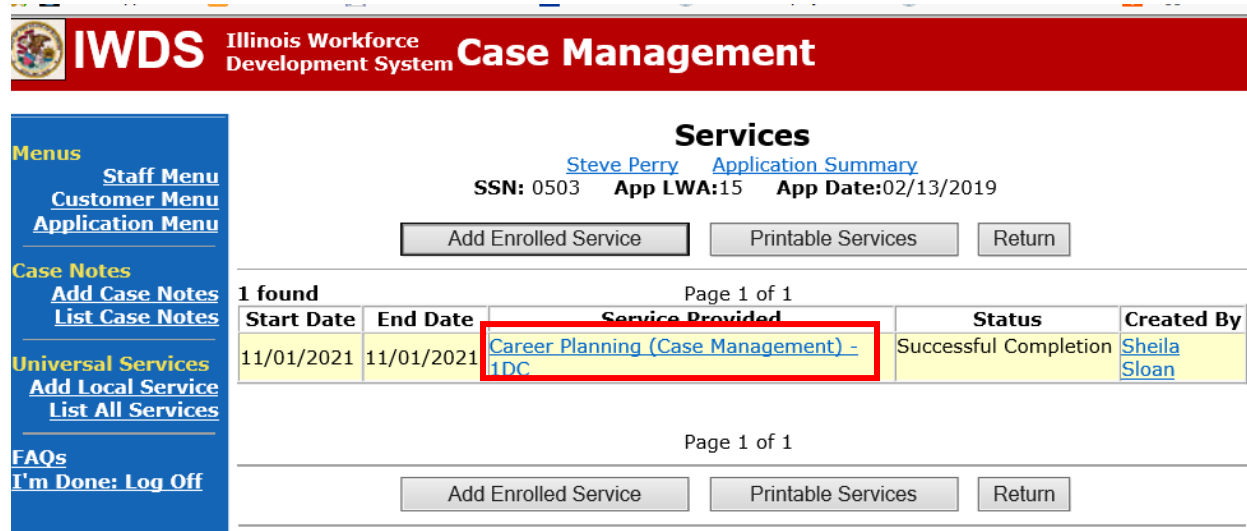
Services

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

Exit

- [Exit Summary](#)
- [View Wages](#)
- [Performance Impact](#)

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



The screenshot shows the 'Services' page in the IWDS Case Management system. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. The user is identified as Steve Perry, with SSN: 0503, App LWA:15, and App Date:02/13/2019. A table lists services, with one entry highlighted: 'Career Planning (Case Management) - 1DC' with a status of 'Successful Completion' and created by 'Sheila Sloan'. The page includes navigation buttons like 'Add Enrolled Service', 'Printable Services', and 'Return'.

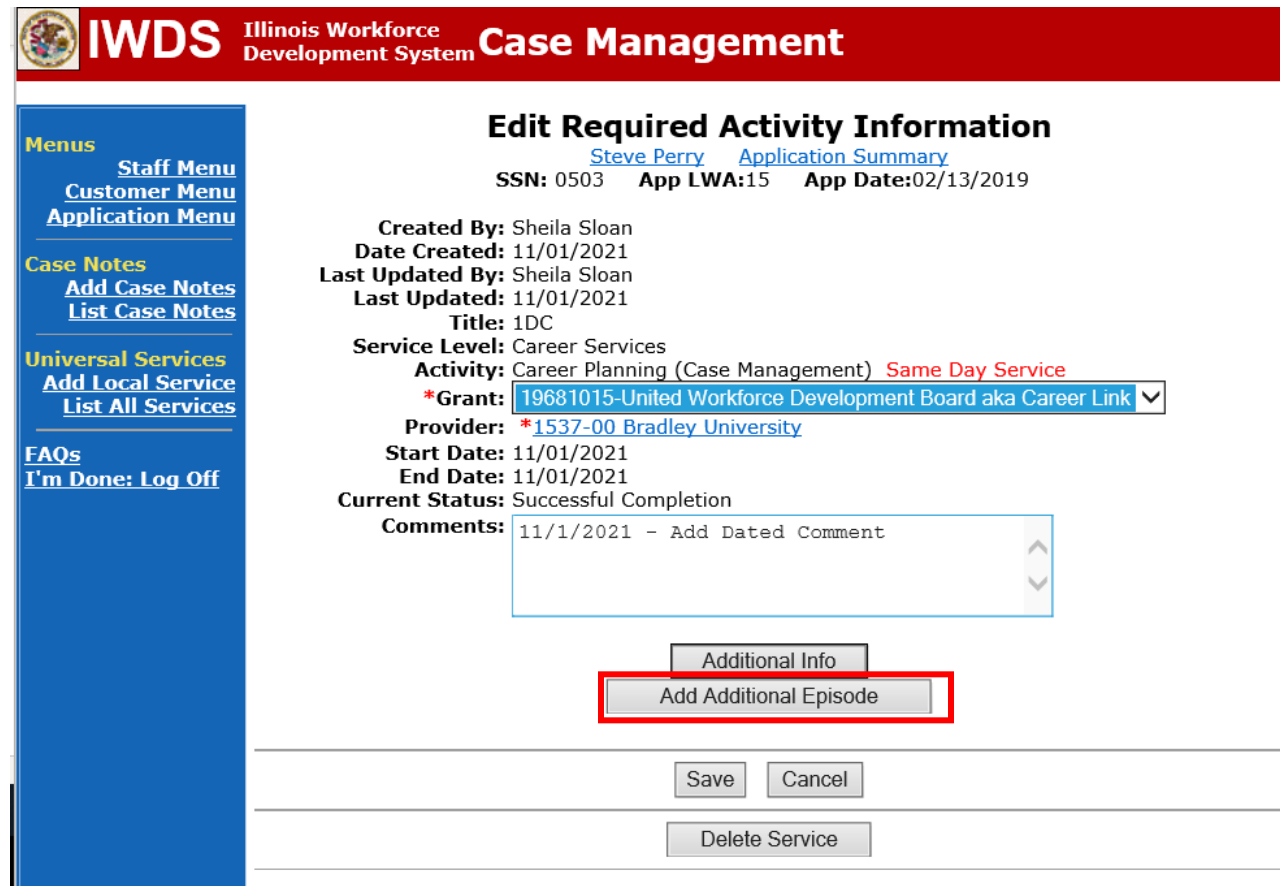
Services
Steve Perry Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019

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

Click **Add Additional Episode**.



The screenshot shows the 'Edit Required Activity Information' page in the IWDS Case Management system. It displays details for the selected service: 'Career Planning (Case Management) Same Day Service'. The activity is associated with grant '19681015-United Workforce Development Board aka Career Link' and provider '1537-00 Bradley University'. The status is 'Successful Completion'. A comment field contains '11/1/2021 - Add Dated Comment'. The 'Add Additional Episode' button is highlighted with a red box.

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 an Additional Episode is added to a Same Day Service. Below this is the 'Add Case Note' form, which includes a 'Staff Name' field with 'Steve Perry' and 'Application Summary' as links, and 'Sheila Sloan' as the selected staff member. The form fields are: '*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.

Update the TAA Training Criteria screen in IWDS.

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

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](#)

If enrolling a participant in training, the first six questions must be answered “Yes”. The RTAA question is answered “No” unless the participant is enrolling in RTAA.

TAA Training Criteria
[Steve Perry](#) [Application Summary](#)
 SSN: 0503 **App LWA:**15 **App Date:**02/13/2019
 TAA Petition Number: 90900 TAA Act: 2015

*There is no suitable employment (which may include technical and professional employment) available for any adversely affected worker? ▾

*The worker would benefit from appropriate training? ▾

*There is a reasonable expectation of employment following completion of such training? ▾

*Training approved by the Secretary is reasonably available to the worker from either governmental agencies or private sources (which may include area vocational education schools, as defined in Section 195(2) of the Vocational Education Act of 1963 and employers)? ▾

*The worker is qualified to undertake and complete such training? ▾

*Such training is suitable for the worker and available at a reasonable cost? ▾

*Is participating in RTAA? ▾

WORK-BASED TRAINING

To enter Work-Based Training, the career planner will:

Complete a **Work-Based Training (WBT) Agreement Commerce/Trade Form #008 (WBT Agreement)**.

Complete an **Eligibility Determination for Trade Transportation-Subsistence Assistance Commerce/Trade Form #005 (Transportation-Subsistence Form)** along with Google Map printout.

To enter Work-Based Training:

Select **List Enrolled Services** on the **Application Menu** 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". A "Printable Application" button is visible. Below this, there 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). An "Exit" section contains links for Exit Summary, View Wages, and 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

6 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/01/2021		Occupational Skills Training - TAA	Open	Sheila Sloan
12/01/2021		Travel in 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
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

Page 1 of 1

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: **TAA** ▼

< Back Next >

Cancel

Select **Job Training** from the drop down for **Service Level**.
Enter **Start Date** of the **Work-Based Training**.
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 sections for 'Menus', 'Case Notes', 'Universal Services', and 'FAQs'. The main content area is titled 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: TAA'. The '*Service Level:' dropdown is set to 'Job Training'. The '*Start Date:' field is empty. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Select the appropriate work-based training (On-the-Job Training, Apprenticeship, Customized Training) for the **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 navigation menu with sections for 'Menus', '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 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: TAA'. The 'Service Level:' is 'Job Training'. The '*Activity:' dropdown is set to 'On-The-Job Training'. The 'Start Date:' is '12/10/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Make sure the current active grant for your local area is selected in the **Grant** field.

IWDS Illinois Workforce Development System **Case Management**

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Training
Activity: On-The-Job Training
***Grant:** 17661015-United Workforce Development Board aka Career Link

Provider: * * Search Providers

***CIP Code:** Search

*** O*Net Code:** Search Requires O*Net

Start Date: 12/10/2021
End Date:
Current Status: Pending Approval
***Weekly Hours:**

***Bridge Program Activity?** No

Comments:

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

Additional Info

< Back

Save Cancel

Click **Search Providers** to select the provider of the training.
Click **Show All** or enter the **Provider Relationship Name** and click **Search**.

IWDS Illinois Workforce Development System **Case Management**

Search Provider Relationships

Show All


Provider Relationship Name:

Relationship Number: -

Statutory Program: TAA/NAFTA
Title: TAA
Service Level: Job Training
Activity: On-The-Job Training
Start Date: 12/10/2021

Search Return

Click **Pick** beside the provider.

 **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 Provider Relationships

5 found Page 1 of 2

	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"/>	Gingers Community College	gingers-00	Contract

Page 1 of 2

Click **Search** for **CIP Code**.

Enter the Occupation for the Work-Based Training.

Click **Search**.

IWDS Illinois Workforce Development System **Case Management**

Welcome to the **CIP Codes Finder**. Enter the name of your occupation or a skill you possess or leave blank to search for all Occupations.
(Example: Enter 'computer' for computer-related skills or 'weld' to find skills for 'welding'.)

Occupation:

- [Agriculture, Agriculture Operations, And Related Sciences](#)
- [Architecture And Related Services](#)
- [Area, Ethnic, Cultural, Gender, and Group Studies.](#)
- [Basic Skills and Developmental/Remedial Education.](#)
- [Biological And Biomedical Sciences](#)
- [Business, Management, Marketing, And Related Support Services](#)
- [Citizenship Activities](#)
- [Communication, Journalism, And Related Programs](#)
- [Communications Technologies/ Technicians And Support Services](#)
- [Computer And Information Sciences And Support Services](#)
- [Construction Trades](#)
- [Education](#)
- [Engineering](#)
- [Engineering Technologies and Engineering-Related Fields.](#)
- [English Language And Literature/ Letters.](#)
- [Family And Consumer Sciences/Human Sciences](#)
- [Foreign Languages, Literatures, And Linguistics](#)
- [Health Professions And Related Programs.](#)
- [Health- Related Knowledge And Skills](#)
- [High School/ Secondary Diplomas And Certificates](#)
- [History](#)
- [Homeland Security, Law Enforcement, Firefighting and Related Protective Services.](#)
- [Interpersonal And Social Skills](#)
- [Language Et Littatures Franaises/ Lettres](#)
- [Leisure And Recreational Activities](#)
- [Liberal Arts And Sciences, General Studies, And Humanities](#)
- [Library Science](#)
- [Mathematics And Statistics](#)
- [Mechanic And Repair Technologies/Technicians](#)
- [Military Science, Leadership and Operational Art.](#)
- [Military Technologies and Applied Sciences.](#)
- [Multi-/Interdisciplinary Studies, General.](#)
- [Natural Resources And Conservation](#)
- [Parks, Recreation, Leisure And Fitness Studies](#)
- [Personal And Culinary Services](#)
- [Personal Awareness And Self-Improvement](#)
- [Philosophy and Religious Studies, General.](#)
- [Physical Sciences](#)
- [Precision Production](#)
- [Psychology](#)
- [Public Administration And Social Service Professions](#)
- [Residency Programs.](#)
- [Science Technologies/Technicians, General.](#)
- [Social Sciences](#)
- [Technology Education/ Industrial Arts](#)
- [Theology And Religious Vocations](#)
- [Transportation And Materials Moving](#)
- [Visual And Performing Arts](#)

tps://qaiwds.dceo.illinois.gov/mhdsm04x/CIS2048?command=Edit&idHier=53&ISM_JSP_TS_RQST=202112101416408548&footerIdUser=3335834&footerIdApplication=4005323&footerId

Click **Pick** beside the occupation for the work-based training.

IWDS Illinois Workforce Development System **Case Management**

Occupation:

<input type="button" value="Pick"/>	Furniture Design And Manufacturing	480702
<input type="button" value="Pick"/>	Manufacturing Engineering	143601
<input type="button" value="Pick"/>	Manufacturing Engineering Technology/Technician.	150613
<input type="button" value="Pick"/>	Semiconductor Manufacturing Technology.	150616

Click **Search** for the O*Net Code.

IWDS Illinois Workforce Development System **Case Management**

Add Required Activity Information

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

Created By: Sheila Sloan
 Title: TAA
 Service Level: Job Training
 Activity: On-The-Job Training
 *Grant:

Provider: * *

*CIP Code:

CIP Description: Manufacturing Engineering Technology/Technician.
 * O*Net Code: Requires O*Net

Start Date: 12/10/2021
 End Date:
 Current Status: Pending Approval
 *Weekly Hours:

*Bridge Program Activity?

Comments:

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

Enter the occupation and click **Search**.

Welcome to the **O*Net Codes Finder**. Enter the name of your occupation or a skill you possess or leave blank to search for all Occupations.
(Example: Enter 'computer' for computer-related skills or 'weld' to find skills for 'welding'.)

Occupation:

- [Architecture and Engineering Occupations](#)
- [Arts, Design, Entertainment, Sports, and Media Occupations](#)
- [Building and Grounds Cleaning and Maintenance Occupations](#)
- [Business and Financial Operations Occupations](#)
- [Community and Social Services Occupations](#)
- [Computer and Mathematical Occupations](#)
- [Construction and Extraction Occupations](#)
- [Education, Training, and Library Occupations](#)
- [Farming, Fishing, and Forestry Occupations](#)
- [Food Preparation and Serving Related Occupations](#)
- [Healthcare Practitioners and Technical Occupations](#)
- [Healthcare Support Occupations](#)
- [Installation, Maintenance, and Repair Occupations](#)
- [Legal Occupations](#)
- [Life, Physical, and Social Science Occupations](#)
- [Management Occupations](#)
- [Military Specific Occupations](#)
- [Office and Administrative Support Occupations](#)
- [Personal Care and Service Occupations](#)
- [Production Occupations](#)
- [Protective Service Occupations](#)
- [Sales and Related Occupations](#)
- [Transportation and Material Moving Occupations](#)

Click **Pick** beside the applicable occupation.

Occupation:

<input type="button" value="Pick"/>	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	512011	Statewide Priority
<input type="button" value="Pick"/>	Assemblers and Fabricators, All Other	512099	Growth
<input type="button" value="Pick"/>	Electrical and Electronic Equipment Assemblers	512022	Growth
<input type="button" value="Pick"/>	Electromechanical Equipment Assemblers	512023	Statewide Priority
<input type="button" value="Pick"/>	Engine and Other Machine Assemblers	512031	Statewide Priority
<input type="button" value="Pick"/>	Team Assemblers	512092	Statewide Priority
<input type="button" value="Pick"/>	Timing Device Assemblers and Adjusters	512061	Statewide Priority

Enter the **Weekly Hours** the participant will be working.
 Select the appropriate answer for the **Bridge Program Activity**. Unless the participant is enrolled in a specific Bridge type of program, this should be marked "No".
 Enter any specific comments in the **Comment Box** that are necessary.
 Click **Save**. This will set the record to a pending approval status.

IWDS Illinois Workforce Development System **Case Management**

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Training
Activity: On-The-Job Training
***Grant:** 17661015-United Workforce Development Board aka Career Link

Provider: *1537-00 Bradley University *
***CIP Code:** 150613
CIP Description: Manufacturing Engineering Technology/Technician.
*** O*Net Code:** 512099 Requires O*Net
Start Date: 12/10/2021
End Date:
Current Status: Pending Approval
***Weekly Hours:** 40
***Bridge Program Activity?** No

Comments:

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

The **On-the-Job (Work-Based Training)** is now in a pending approval status.

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

Informational Message:
The record has been added.

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

10 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/10/2021		On-The-Job Training - TAA	Pending Approval	Sheila Sloan
12/08/2021		RTAA Registrant - TAA	Open	Sheila Sloan
12/01/2021		Occupational Skills Training - TAA	Open	Sheila Sloan
12/01/2021		Travel in Training - TAA	Open	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
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

Page 1 of 1

If the participant is eligible for travel/subsistence reimbursements, the career planner must enter the **Travel in Training** or **Subsistence in Training Service Record** following these steps:

Enter the **Travel in Training** or **Subsistence in Training Service Record**, if applicable.

Case Management

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

Printable Application

Application Menu

- 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**.

Case Management

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

*Title: TAA

< Back Next >

Cancel

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Select **Job Training** for **Service Level**.

Enter **Start Date**. The start date should be the date the training will begin.

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'. A left-hand menu contains links for Staff Menu, Customer Menu, Application Menu, Case Notes, Universal Services, and FAQs. The main content area is titled 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays the user's SSN (0503), App LWA (15), and App Date (02/13/2019). The 'Title' is set to 'TAA'. The '*Service Level' dropdown is set to 'Job Training'. The '*Start Date' is '12/1/2021'. Navigation buttons for '< Back', 'Next >', and 'Cancel' are visible. A copyright notice at the bottom states: 'Copyright 2004 by the State of Illinois. Using this web site indicates acceptance of DCEO User Agreement and IWDS Privacy Notice.'

Select **Travel in Training** or **Subsistence in Training**, as applicable, for **Activity**.

Click **Next**.

The screenshot shows the IWDS Case Management interface at the 'Select Activity' step. The header and left-hand menu are identical to the previous screenshot. 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 'TAA', 'Service Level' is 'Job Training', and '*Start Date' is '12/01/2021'. The '*Activity' dropdown is set to 'Travel in Training'. Navigation buttons for '< Back', 'Next >', and 'Cancel' are visible.

Click on **Select Provider**

IWDS Illinois Workforce Development System **Case Management**

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Training
Activity: Travel in Training
***Grant:** 17661015-United Workforce Development Board aka Career Link
Provider: * * Search Providers
Start Date: 12/01/2021
End Date:
Current Status: Pending Approval
Comments:

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

< Back Additional Info

Enter the Provider Name and click **Search** or click on **Show All**.

IWDS Illinois Workforce Development System **Case Management**

Search Provider Relationships

Show All

Provider Relationship Name:
Relationship Number: -
Statutory Program: TAA/NAFTA
Title: TAA
Service Level: Job Training
Activity: Travel in Training
Start Date: 12/01/2021

Search Return

Select the provider by clicking on **Pick** beside the provider name.

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 Provider Relationships

[Return To Search](#)

5 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	Gingers Community College	gingers-00	Contract

Page 1 of 2 [Next Page >](#)

[Return To Search](#)

Click **Save**

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: Job Training
Activity: Travel in Training
***Grant:** [17661015-United Workforce Development Board aka Career Link](#) ▼
Provider: *[1537-00 Bradley University](#)* [Search Providers](#)
Start Date: 12/01/2021
End Date:
Current Status: Pending Approval
Comments:

TAA Services Completed: [Confirm](#) *Click Confirm when all TAA Services have been completed*

[Additional Info](#)

[< Back](#)

The **Travel in Training Service Record** is now in a pending approval status.

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

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)
Case Notes
[Add Case Notes](#)
[List Case Notes](#)
Universal Services
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FAQs
[I'm Done: Log Off](#)

Informational Message:
The record has been added.

Services

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

6 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/01/2021		Occupational Skills Training - TAA	Open	Sheila Sloan
12/01/2021		Travel in Training - TAA	Pending Approval	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
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

Page 1 of 1

Upload the **IEP and IEP Modification Form, Training Enrollment Form or WBT Agreement, Transportation-Subsistence Form, Google Maps printout, Tracking Form**, 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**. Make sure you are on the correct application for the participant (WIOA or TAA).

IWDS Illinois Workforce Development System **Case Management**

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

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 Document**.

IWDS Illinois Workforce Development System **Case Management**

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"/>	71	Application Menu	Form #014 DCEO/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 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:

Copyright [Privacy](#)

- 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

PART-TIME/DISTANCE LEARNING

If the **Work-Based Training** is part-time or online (distance learning), the career planner must complete the following steps:

To add a **Part Time Indicator**:

Under **Services** in IWDS, the career planner will select **List Part Time/Distance Learning**

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" (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 - highlighted with a red box). An "Exit" section contains links for Exit Summary, View Wages, and View TAA Costs.

To add a Part Time Indicator:

Click **Add Part Time/Distance Learning**

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning History

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

Add Part Time/Distance Learning Return

Date	Type	Status Deleted?	Last Updated By	Date Created	Date Updated
There are no records at this time.					

Add Part Time/Distance Learning 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

Select **Part Time** under **Status Type**

Enter the date the part-time training begins under **Start Date**

Select **Yes** for **Status**.

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning Detail

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

*Status Type:
*Start Date:
*Status:

Save Cancel

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

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

Universal Services
[Add Local Service](#)

Click **Save**.

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 options like 'Staff Menu', 'Customer Menu', 'Application Menu', 'Case Notes', and 'Universal Services'. The main content area is titled 'Part Time/Full Time - Distance Learning Detail'. It includes links for 'Steve Perry' and 'Application Summary', and displays 'SSN: 0503 App LWA:15 App Date:02/13/2019'. There are three dropdown menus: '*Status Type:' set to 'Part Time Training', '*Start Date:' set to '12/1/2021', and '*Status:' set to 'Yes'. At the bottom of the form are 'Save' and 'Cancel' buttons. A copyright notice is visible at the bottom of the page.

This is what the screen looks like after you click **Save**.

The screenshot shows the IWDS Case Management interface after a save action. The header and sidebar are the same as in the previous screenshot. The main content area is titled 'Part Time/Full Time - Distance Learning History'. It includes the same links and application information. Below the header are two buttons: 'Add Part Time/Distance Learning' and 'Return'. A table displays the history of distance learning entries. The table has columns for 'Date', 'Type', 'Status', 'Deleted?', 'Last Updated By', 'Date Created', and 'Date Updated'. One entry is shown for '12/01/2021' with 'Part Time Training' type, 'Y' status, and 'N' for deleted. The 'Last Updated By' is 'Sheila Sloan'. Below the table are two more buttons: 'Add Part Time/Distance Learning' and 'Return'. A copyright notice is visible at the bottom of the page.

	Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
View	12/01/2021	Part Time Training	Y	N	Sheila Sloan	12/02/2021	12/02/2021

To add a **Distance Learning Indicator**:

Click **Add Part Time/Distance Learning**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. The main content area is titled 'Part Time/Full Time - Distance Learning History' and includes links for 'Steve Perry' and 'Application Summary'. Below this, the user information 'SSN: 0503 App LWA:15 App Date:02/13/2019' is displayed. There are two 'Add Part Time/Distance Learning' buttons and 'Return' buttons. A table with columns 'Date', 'Type', 'Status Deleted?', 'Last Updated By', 'Date Created', and 'Date Updated' is shown, with a yellow message 'There are no records at this time.' in the center. The footer contains the copyright notice: 'Copyright 2004 by the State of Illinois. Using this web site indicates acceptance of DCEO User Agreement and'.

Select **Distance Learning** for **Status Type**.

Enter the date the distance learning begins under **Start Date**

Select **Yes** for **Status**.

The screenshot shows the IWDS Case Management interface for 'Part Time/Full Time - Distance Learning Detail'. The header is the same as the previous screenshot. The main content area is titled 'Part Time/Full Time - Distance Learning Detail' and includes links for 'Steve Perry' and 'Application Summary'. Below this, the user information 'SSN: 0503 App LWA:15 App Date:02/13/2019' is displayed. There are three fields: '*Status Type:' with a dropdown menu showing 'Part Time Training' and 'Distance Learning', '*Start Date:' with an empty input field, and '*Status:' with a dropdown menu. There are 'Save' and 'Cancel' buttons. The footer contains the copyright notice: 'Copyright 2004 by the State of Illinois. Using this web site indicates acceptance of DCEO User Agreement and'.

Click **Save**.

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning Detail

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

*Status Type: Distance Learning ▼
 *Start Date: 12/1/2021
 *Status: Yes ▼

Save Cancel

Copyright 2004 by the State of Illinois. Using this web site indicates acceptance of [DCFO User Agreement](#) and

This is what the screen looks like after you click **Save**.

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning History

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

Add Part Time/Distance Learning Return

	Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
View	12/01/2021	Distance Learning	Y	N	Sheila Sloan	12/02/2021	12/02/2021
View	12/01/2021	Part Time Training	Y	N	Sheila Sloan	12/02/2021	12/02/2021

Add Part Time/Distance Learning Return

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

Email Subject Line: New IEP or IEP Modification (as applicable) and Work Based Training Approval Request – “Customer First Name Initial and Participant Last Name” – LWIA XX

Body of Email:

Can we have a New IEP (or IEP Modification) and Work-Based Training Approval for:

Include information for the items below:

Participant Name:

Training Institution:

Training Program:

Employer Name:

Total Training Weeks:

Start Date of Training Program:

Planned End Date of Training Program:

Training Cost:

Transportation/Subsistence Cost:

Total IEP Amount:

Justification:

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.