

## ATAA/RTAA

**The career planner will do the following for submission of requests to approve ATAA or RTAA:**

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.

Complete an **ATAA/RTAA Application Commerce/Trade Form #011 (A/RTAA Application)**.

Send the **RTAA Application** to Illinois Department of Employment Security (IDES) for review/approval.

The entry of the initial **IEP Service** and **Status Records** and **Trade** or **WIOA 1EC/1DC Career Planning (Case Management) Service Records** can be entered while IDES is reviewing the **RTAA Application**, or they can be entered after IDES approval of the **RTAA Application**.

If the entries are made while IDES is reviewing the **RTAA Application**, the steps for entry of **Trade Case Management** or **WIOA 1EC/1DC Career Planning (Case Management)** beginning on page 9 of this document will need to be repeated once the **RTAA Application** is approved by IDES and the **RTAA Service, Returned to Work Status, and IEP Status Update** are entered.

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.

**Case Management**

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

Printable Application

**Application Menu**

**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**.

**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**.



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

- Menu
  - [Staff Menu](#)
  - [Customer Menu](#)
  - [Application Menu](#)
- Case Notes
  - [Add Case Notes](#)
  - [List Case Notes](#)
- Universal Services
  - [Add Local Service](#)
  - [List All Services](#)
- FAQs
  - [Home](#)
  - [Help](#)
  - [Log Off](#)

### Edit Required Activity Information

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

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

**Created By:** Sheila Sloan  
**Date Created:** 02/22/2019  
**Last Updated By:** Sheila Sloan  
**Last Updated:** 02/22/2019  
**Approved/Denied By:**  
**Approved/Denied:**  
**Date:**  
**Title:** TAA  
**Service Level:** Individual Employment Plan  
**Activity:** Individual Employment Plan  
**Provider:** \*3027-00 Workforce Network  
**\* O\*Net Code:**   Requires O\*Net  
**Start Date:** 02/13/2019  
**End Date:**   
**\*Current Status:**    
**Comments:**   
**TAA Services Completed:**  Click Confirm when all TAA Services have been completed

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

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

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

Complete the **Status Start Date**

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

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

Click **Save**.

Case Management

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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**

Item 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

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**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.					

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
<a href="#">View</a>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<a href="#">View</a>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	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

**Maintain TAA Status**

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

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

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**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:**

12/8/21 - Requesting approval for RTAA enrollment. Approved by IDES on 12/8/21.  
 11/30/21 - Requesting approval for enrollment in training. See case note dated 11/30/21 for

**IEP Amount Approved:**

**Created By:** Sheila Sloan   **Date Created:** 02/22/2019  
**Last Updated By:** Sheila Sloan   **Date Last Updated:** 11/30/2021

Approval Type	Approver	Approved/Denied Date	Approval Status	Previous IEP Amount
IEP Revision	Sheila Sloan	12/02/2021	Approved	
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  



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

0 found Page 1 of 1

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

Page 1 of 1

Add Enrolled Service Printable Services Return

Select **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. 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 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 includes links for 'Steve Perry' and 'Application Summary'. Below these are the fields 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. A dropdown menu for '\*Title:' is set to 'TAA'. At the bottom are buttons for '< 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 is titled 'Select Service Level and Start Date' and includes the same links and fields. The '\*Title:' field is now 'TAA'. The '\*Service Level:' dropdown menu is set to 'Employment and Case Management'. The '\*Start Date:' field is set to '11/1/2021'. At the bottom are buttons for '< 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' for 'Steve Perry' with an 'Application Summary' link. The form includes the following fields and options:

- 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 (dropdown)
- Provider:** Search Providers (button)
- Start Date:** 10/25/2020
- \*End Date:** (text input)
- \*Current Status:** Open (dropdown)
- \*Weekly Hours:** (text input)
- \* Bridge Program Activity?:** No (dropdown)
- Comments:** (text area)
- TAA Services Completed:** Confirm (button) *Click Confirm when all TAA Services have been completed*
- Additional Info:** (button)
- < Back:** (button)
- Save:** (button)
- Cancel:** (button)

A blue sidebar on the left contains navigation menus: 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	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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**

**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	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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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:** 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**

**Menues**  
[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

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**Menu**

[Staff Menu](#)

[Customer Menu](#)

[Application 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](#)

## Services

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

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

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**3 found** Page 1 of 1

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

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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 (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 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 includes the user name "Steve Perry" and "Application Summary" links. It displays application details: "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". A "Printable Application" button is present. The menu is organized into three columns: "Application" (with 15 items like Guided Application, Application Definition, Assessment Summary, etc.), "Profile" (with 10 items like Contact Information, Additional Contacts, Private Information, etc.), and "Services" (with 3 items: List Enrolled Services, ITA Characteristics, List Part Time/Distance Learning). The "List Enrolled Services" item is highlighted with a red box. An "Exit" section at the bottom right contains three items: Exit Summary, View Wages, and Performance Impact.

Click **Add Enrolled Service**.

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

Add Enrolled Service Printable Services Return

0 found Page 1 of 1

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

Page 1 of 1

Add Enrolled Service Printable Services Return

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

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

\*Title: 1DC

< Back Next >

Cancel

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

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

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

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), 'Universal Services' (Add Local Service, List All Services), and 'FAQs' (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' and the '\*Activity:' dropdown 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 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 links for 'Steve Perry' and 'Application Summary'. The form displays the following information: SSN: 0503, App LWA:15, App Date:02/13/2019. Fields include: 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\* with a Search Providers button, Start Date: 11/01/2021, End Date: 11/1/2021, Current Status: Successful Completion, and Comments: 11/1/2021 - Add Dated Comment. Navigation buttons include '< 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), "FAQs", and "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 this message is the "Add Case Note" form. The form includes the following fields: "Staff Name" (Sheila Sloan), "Contact Date" (11/01/2021), "Program" (WIOA), "\*Note Category" (Case Note Supporting Same Day Service), "\*Confidential" (No), "\*Note Subject" (Case Management), and "\*Case Note" (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**.

**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	<a href="#">Career Planning (Case Management) - IDC</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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**

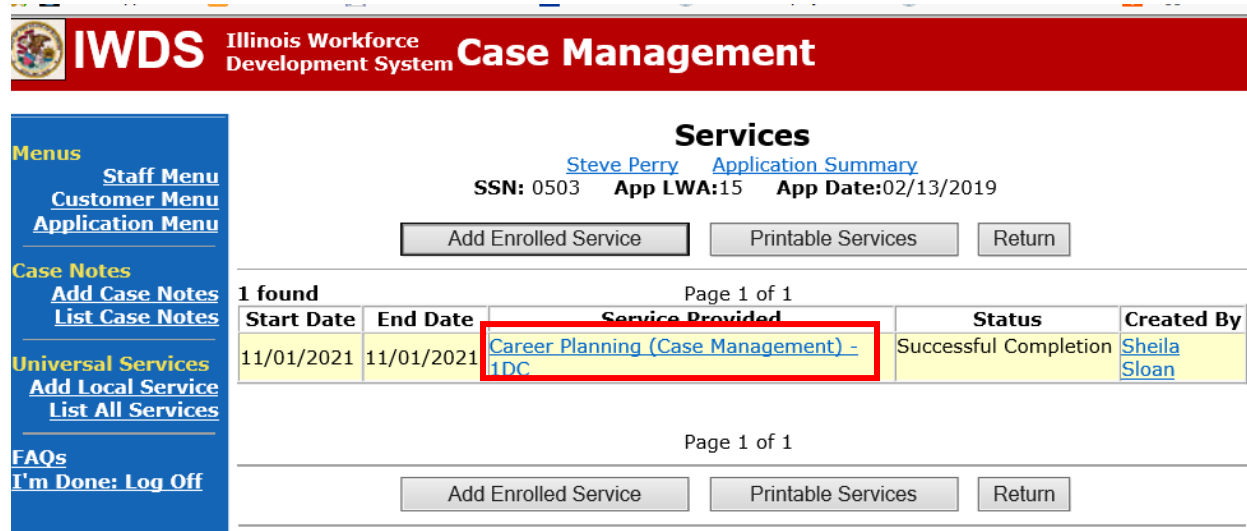
- [List Enrolled Services](#)
- [ITA Characteristics](#)
- [List Part Time/Distance Learning](#)

**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'.

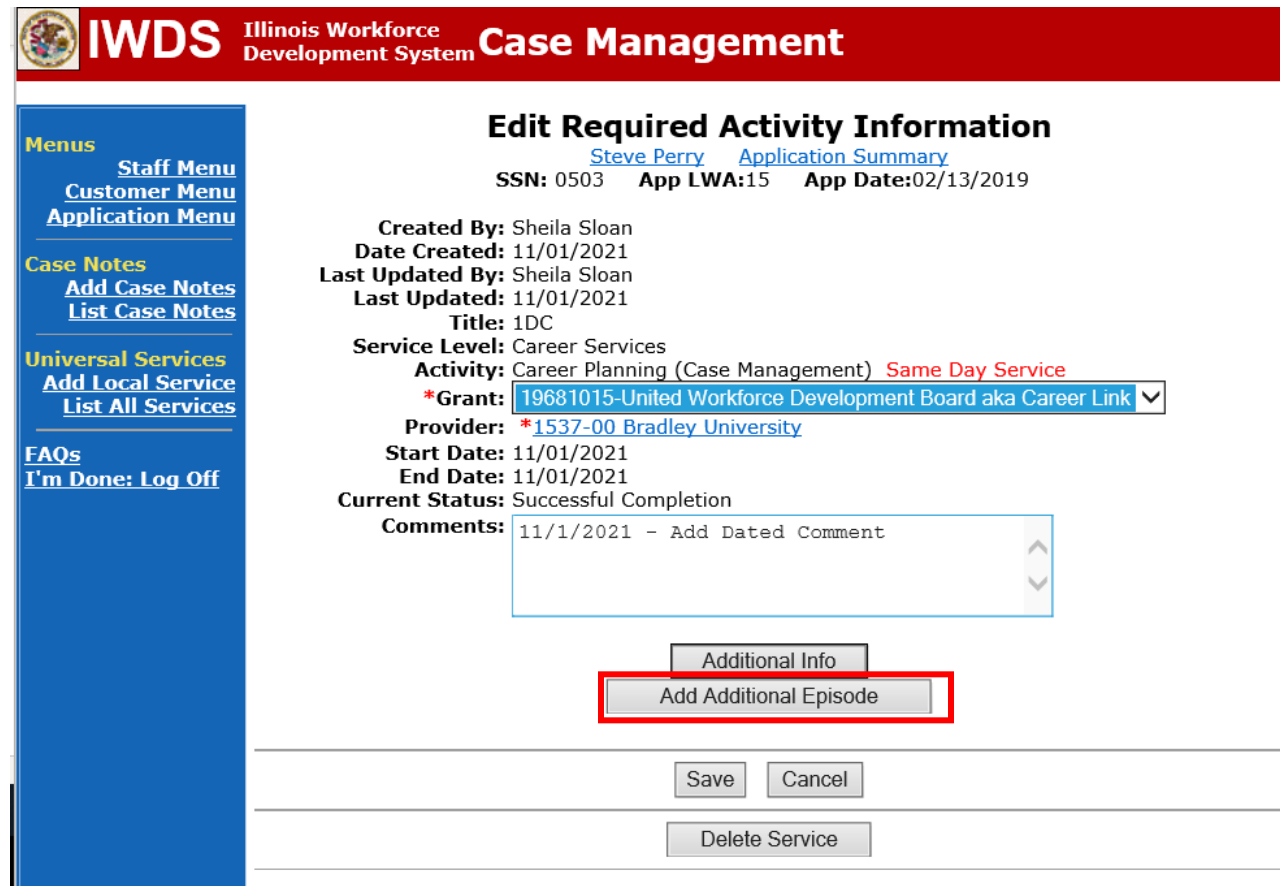
**Services**  
Steve Perry Application Summary  
SSN: 0503 App LWA:15 App Date:02/13/2019

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. The user is identified as Steve Perry, with SSN: 0503, App LWA:15, and App Date:02/13/2019. The page displays details for a service episode, including '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', and 'Current Status: Successful Completion'. A comments 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 adding an Additional Episode to a Same Day Service. Below this is the 'Add Case Note' form, which includes a 'Staff Name' field (Sheila Sloan) and links for 'Steve Perry' and 'Application Summary'. 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.

Add the new ATAA/RTAA employment on **Employment History** on the **Customer Menu** for the participant.

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

**Customer Menu**  
Steve Perry

**Menus**  
Staff Menu  
Customer Menu

**Case Notes**  
Add Case Notes  
List Case Notes

**Universal Services**  
Add Local Service  
List All Services

**FAQs**  
I'm Done: Log Off

**Customer Profile**

- Contact Information
- Additional Contacts
- Private Information
- Veterans Information
- Employment History**
- Credentials List
- Participant Periods
- Generate Swipe Card

**Applications**

- List Applications

**Referrals**

- Add Referral
- List Referrals

**Reports**

- Customer Info Report
- View Wages

Under List Work History, click **Add Job**.

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

**List Work History**  
Steve Perry Application Summary  
SSN: 0505 App LWA:15 App Date:02/13/2019

Add Job Return

1 found Page 1 of 1

	Employer Name	Employment Dates	Dislocation Job?	DETS ID
Pick	Caterpillar	10/01/1985 - 08/21/2018	Y	20151014001

Page 1 of 1

Add Job Return

Fill in all information for the new employment. NOTE: There should not be a DETS ID for the new employment since it is not a dislocation job.

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

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

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

DETS ID:

TAA Petition:  -  [Verify TAA Petition Number](#)

\*Employer Name:

\*Employment Status:

\*Start Date:  End Date:

Job Title:

Street Address:

City:

State:  Zip Code:

Contact Name:

Contact Phone:  Extension:

Wages:  Per:

\*Hours Per Week:

Job Duties:

\*Primary Occupation:  Dislocation:

Self Employed:  Family Member/Farmhand:

Layoff Reason:

Received Severance Pay:

Date Notified of Layoff:

\*Received Rapid Response Services:

Last Date Received Rapid Response Services:

Nafta Petition:  -  [Verify NAFTA Petition Number](#)

TAA Return to Work:

ATAA/RTAA Employment?:

\*NAICS Code:

Description:

\*O\*Net(SOC):

Description:

Search for Employer Name by entering a particla name in **Entity Name**.  
Click **Search**.

Click **Pick** beside the name of the employer.

	Entity Name	FEIN/SSN	Locations	Contacts
<input type="button" value="Pick"/>	Memorial Health System Memorial Health System	371110690	1	4
<input type="button" value="Pick"/>	MEMORIAL HOSPITAL	370635502	2	1
<input type="button" value="Pick"/>	Memorial Hospital	370684691	2	2
<input type="button" value="Pick"/>	MEMORIAL HOSPITAL MEMORIAL HOSPITAL		1	0
<input type="button" value="Pick"/>	Memorial Medical Center	370661220	2	4

Click **Search** beside NAICS Code to find the NAICS code for the new employment.  
 Enter the industry.  
 Click **Search**.

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

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

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

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

Welcome to the **NAICS 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'.)  
**Industry:**

- [Accommodation and Food Services](#)
- [Administrative and Support and Waste Management and Remediation Services](#)
- [Agriculture, Forestry, Fishing and Hunting](#)
- [Arts, Entertainment, and Recreation](#)
- [Construction](#)
- [Educational Services](#)
- [Finance and Insurance](#)
- [Health Care and Social Assistance](#)
- [Information](#)
- [Management of Companies and Enterprises](#)
- [Manufacturing-Durable Goods, Metallic](#)
- [Manufacturing-Durable Goods, Non-Metallic](#)
- [Manufacturing-Non Durable Goods](#)
- [Mining, Quarrying, and Oil and Gas Extraction](#)
- [Other Services \(except Public Administration\)](#)
- [Postal/Messenger Services and Warehousing](#)
- [Professional, Scientific, and Technical Services](#)
- [Public Administration](#)
- [Real Estate and Rental and Leasing](#)
- [Retail Trade](#)
- [Transportation and Freight Handling](#)
- [Utilities](#)
- [Wholesale Trade](#)

Click **Pick** for the category that matches the employment.

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

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

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

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

**Industry:**

<input type="button" value="Pick"/>	Other Accounting Services	541219
-------------------------------------	---------------------------	--------

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Click **Search** beside **O\*Net (SOC)** to search for the O\*Net Code for the employment.  
 Enter the Occupation.  
 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 occupational that matches the employment.

**Occupation:**

<input type="button" value="Pick"/>	Bookkeeping, Accounting, and Auditing Clerks	433031
-------------------------------------	--	--------

Make sure to answer the following questions:

**Received Rapid Response** – should be answered “No” for this new employment since the participant is not being dislocated from this employment.

**TAA Return to Work** – should be “Yes” since this participant is a Trade participant.

**ATAA/RTAA Employment** – should be “Yes” since this employment is approved for ATAA/RTAA.

Once all information is complete, Click **Save**.

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

**DETS ID:**

**TAA Petition:**  -  [Verify TAA Petition Number](#)

**\*Employer Name:** Memorial Health System

**\*Employment Status:** Entered Employment

**\*Start Date:** 12/6/2021 **End Date:**

**Job Title:** Accounting Clerk

**Street Address:** 1 Main Street

**City:** Springfield

**State:** Illinois  **Zip Code:** 62701

**Contact Name:** Mr. Neil Supervisor

**Contact Phone:** 217-512-1111 **Extension:**

**Wages:** \$15.00 **Per:** Hour

**\*Hours Per Week:** 40

**Job Duties:** Accounting entry.

**\*Primary Occupation:** Yes  **Dislocation:** No

**Self Employed:** No  **Family Member/Farmhand:** No

**Layoff Reason:**

**Received Severance Pay:**

**Date Notified of Layoff:**

**\*Received Rapid Response Services:** No

**Last Date Received Rapid Response Services:**

**Nafta Petition:**  -  [Verify NAFTA Petition Number](#)

**TAA Return to Work:** Yes

**ATAA/RTAA Employment?:** Yes

**\*NAICS Code:** 541219

**Description:** Other Accounting Services

**\*O\*Net(SOC):** 433031

**Description:** Bookkeeping, Accounting, and Auditing Clerks



The new employment has been added to the **List Work History Screen**.

**Case Management**

**List Work History**  
[Steve Perry](#)  
 SSN: 0503

[Add Job](#) [Return](#)

2 found Page 1 of 1

Employer Name	Employment Dates	Dislocation Job?	DETS ID
<a href="#">Memorial Health System</a>	12/06/2021 -	N	
<a href="#">Caterpillar</a>	10/01/1985 - 08/21/2018	Y	20151014001

Page 1 of 1

[Add Job](#) [Return](#)

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Enter the **Returned to Work Status Record** under **List TAA Status** on the **Application Menu** 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 TAA 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

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

### FAQs

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

## 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
<a href="#">View</a>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/02/2021
<a href="#">View</a>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/02/2021
<a href="#">View</a>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<a href="#">View</a>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

Add TAA Status

Return


Select **Returned to Work** from drop down for **Status**.

Enter **Status Start Date**. This date must match the start date of the employment entered under the Employment History for the RTAA employment.

Enter a dated comment in the **Comment Box** describing the employment.

Answer the **TAA Return to work Part Time** Question appropriately. If the employment is part-time, select "Yes". If the employment is full-time, select "No".

Click **Save**.

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

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

### Maintain TAA Status

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

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

---

**Status:** Returned to Work

**Status Start Date:** 12/6/2021

**Status End Date:**

**Waiver Reason:**

**Suspension Request Reason:**

**Ceased Participation Reason:**

**Comments:** 12/6/21 Participant returned to work at Memorial Health System in Full-time Employment.

**IEP Amount Approved:**

**Revocation Reason:**

**TAA Return to work Part Time:** No

**Qualifies Under 45 Day Extension:**

**Qualifies Under 60 Day Extension:**

**Qualifies Under Federal Good Cause Provision:**

**Qualifies Under Equitable Tolling:**

The **Returned to Work Status** has been added.

**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:**  
 Update Successful

**List TAA Status**

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/06/2021		Returned to Work		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/02/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/02/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

Once IDES approves the **RTAA Application** do the following:

Update the **TAA Training Criteria Screen** under the **Application Menu** for the participant.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header, the page is titled "Application Menu" for "Steve Perry" with an "Application Summary" link. 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 main content area is divided into three columns: "Application", "Profile", and "Services". The "Application" column contains a list of links, with "TAA Training Criteria" highlighted with a red box. The "Profile" column contains a list of links related to the applicant's profile. The "Services" column contains a list of links related to the applicant's services. On the left side, there is a blue sidebar menu with sections for "Menus", "Case Notes", "Universal Services", and "FAQs".

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

**Application**

- [Guided Application](#)
- [Application Definition](#)
- [Assessment Summary](#)
- [TAA Training Criteria](#)
- [TAA Additional Info](#)
- [Concurrent Programs](#)
- [Characteristics and Barriers](#)
- [Employment Characteristics](#)
- [Education Status](#)
- [Tests](#)
- [Public Assistance](#)
- [Family Characteristics](#)
- [Income Calculation](#)
- [Dislocated Worker Characteristics](#)
- [LWA Specific Data](#)
- [Eligibility Determination](#)
- [List TAA Status](#)
- [List IDES View](#)

**Profile**

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

**Services**

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

**Exit**

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

**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](#)

Update the answer to the last question “Is participant in RTAA?” with “Yes”.  
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", "Universal Services", and "FAQs". The main content area is titled "TAA Training Criteria" and includes links for "Steve Perry" and "Application Summary". It displays case information: "SSN: 0503 App LWA:15 App Date:02/13/2019" and "TAA Petition Number: 90900 TAA Act: 2015". The form contains seven questions, each with a "Yes" dropdown menu. The last question, "\*Is participating in RTAA?", has "Yes" selected. At the bottom are "Save" and "Cancel" buttons.

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

**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? Yes ▾

\*The worker would benefit from appropriate training? Yes ▾

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

\*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)? Yes ▾

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

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

\*Is participating in RTAA? Yes ▾

Save Cancel

Enter the **RTAA Service Record** under **List Enrolled Services** on the **Application Menu** for the participant.

The screenshot shows the 'Case Management' interface for Steve Perry. The top navigation bar includes 'IWDS Illinois Workforce Development System' and 'Case Management'. The user's name 'Steve Perry' and 'Application Summary' are displayed. Below this, the SSN is 0503, the App LWA is 15, and the App Date is 02/13/2019. A 'Printable Application' button is visible. The main content area is divided into three columns: 'Application', 'Profile', and 'Services'. The 'Services' column contains a red-bordered box around the 'List Enrolled Services' link, with 'List Part Time/Distance Learning' listed below it. The 'Exit' section includes 'Exit Summary', 'View Wages', and 'View TAA Costs'. A left-hand menu contains 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**.



**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
12/01/2021		<a href="#">Occupational Skills Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Travel in Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Prerequisite Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Remedial Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
11/01/2021	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
10/25/2020	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

Page 1 of 1



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

The screenshot shows the 'Select Title' screen in the IWDS Case Management system. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with options: 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 displays the user 'Steve Perry' and 'Application Summary' with links. Below this, it shows 'SSN: 0503 App LWA:15 App Date:02/13/2019'. The '\*Title:' field is a dropdown menu currently set to 'TAA'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Select **RTAA** from the drop down for **Service Level**.  
Enter the **Start Date**. The start date must match the date of the IDES approval signature on the RTAA application in Box 52. (See below)

The screenshot shows the 'Select Service Level and Start Date' screen in the IWDS Case Management system. The header and sidebar are identical to the previous screenshot. The main content area shows 'Steve Perry' and 'Application Summary' with links, and 'SSN: 0503 App LWA:15 App Date:02/13/2019'. Below this, it shows 'Title: TAA'. The '\*Service Level:' field is a dropdown menu set to 'RTAA'. The '\*Start Date:' field is a text input box containing '12/8/2021' with a clear 'x' button. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

This is the box on the **RTAA Application** for IDES approval. The date here must be the start date of the **RTAA Service Record** in IWDS.

52. <input type="text"/>	<input type="text"/>
IDES Trade Unit Representative Signature	Date

Click **Next**.

Ensure **Activity** shows **RTAA Registrant**.  
Click **Next**.

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

**Select Activity**

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

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

Title: TAA  
Service Level: RTAA  
\*Activity:    
Start Date: 12/08/2021

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Click **Search Providers** to select the provider of the service.  
 Enter the **Provider Relationship Name**, if known, or click **Show All** to search.

Click **Pick** beside the appropriate provider.

	Provider Name	Relationship ID	Relationship Type
Pick	AAAAA Beauty Academy	<a href="#">1586-00</a>	Vendor
Pick	Bradley University	<a href="#">1537-00</a>	Vendor
Pick	Capital Area Career Center	<a href="#">1571-00</a>	Contract

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Make sure the most recent Grant number is selected for your local area in the **Grant** field.  
 Enter the **Planned End Date**. This date must match the date on the **RTAA Application** entered by IDES in Box 50. (See below)  
 Make sure the Current Status is "Open"  
 Enter the Weekly Hours the participant is working at the RTAA employment.

**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: RTAA  
 Activity: RTAA Registrant  
 \*Grant: 17661015-United Workforce Development Board aka Career Link  
 Provider: \*1537-00 Bradley University \* Search Providers  
 Start Date: 12/08/2021  
 \*Planned End Date: 12/8/2023  
 End Date:  
 \*Current Status: Open  
 \*Weekly Hours: 40  
 Comments:

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

The date outlined in the space below must be the date that is entered on the IWDS RTAA Service Record as the **Planned End Date**.

50.  Customer is eligible for Reemployment Trade Adjustment Assistance (RTAA) for the period from \_\_\_/\_\_\_/\_\_\_ through  or until the receipt of \$10,000 Reemployment Trade Adjustment Assistance subsidy, whichever occurs first.

Click **Save**.

The RTAA Service Record has been added.

 **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:**  
The record has been added.

**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
12/08/2021		<a href="#">RTAA Registrant - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Occupational Skills Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Travel in Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Prerequisite Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Remedial Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
11/01/2021	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
10/25/2020	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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Upload the **IEP** or **IEP Modification Form**, as applicable, **RTAA 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**. 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"/>	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 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**.

**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 revision, forward the last state merit staff approval):

**Email Subject Line:** New IEP (if appropriate) and RTAA 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 RTAA Approval for:

**Participant Name:**

**IDES RTAA Application Approval Date**

**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.