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**.

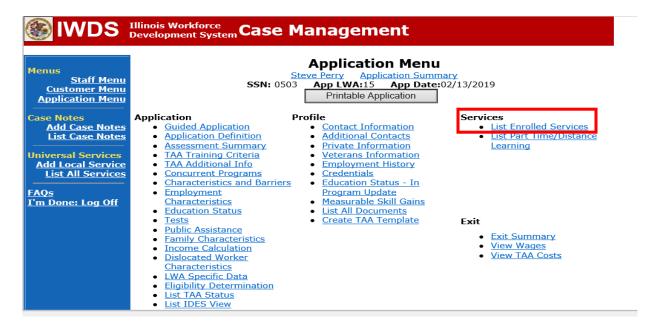Complete an **ATAA/RTAA Application Commerce/Trade Form #011 (A/RTAA Application)**.

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.
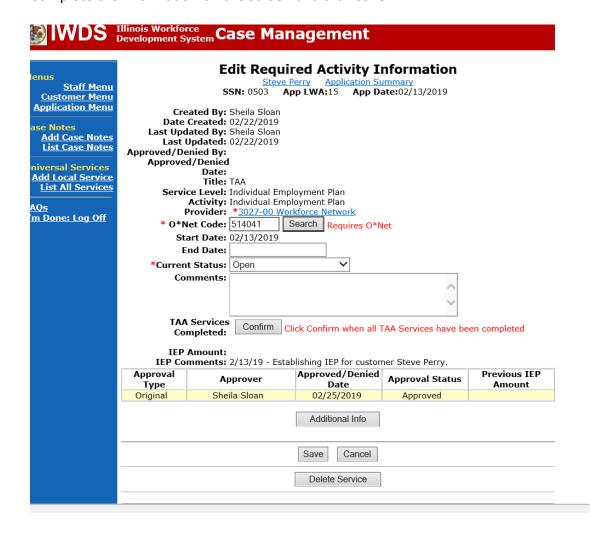

Click **Add Enrolled Service**.

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

Select **Individual Employment Plan** from the drop down for the **Service Level.**

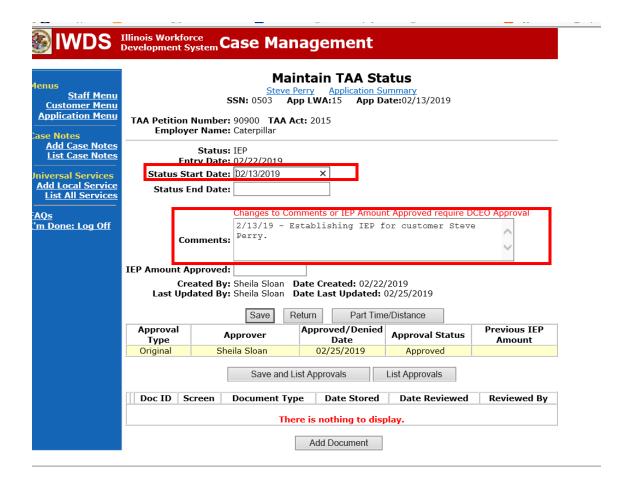Enter the **Start Date.**

Click **Next**.

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

IWDS Illinois Workforce Development System **Case Management**

Edit Required Activity Information
Steve Perry   Application Summary
SSN: 0503   **App LWA:**15   **App Date:**02/13/2019

Menus
Staff Menu
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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

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:	514041 Search Requires O*Net
Start Date:	02/13/2019
End Date:	
*Current Status:	Open
Comments:	

TAA Services Completed: Confirm 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	

Additional Info

Save   Cancel

Delete Service

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**.

If this is an IEP modification (IEP already state merit staff approved) for the participant:

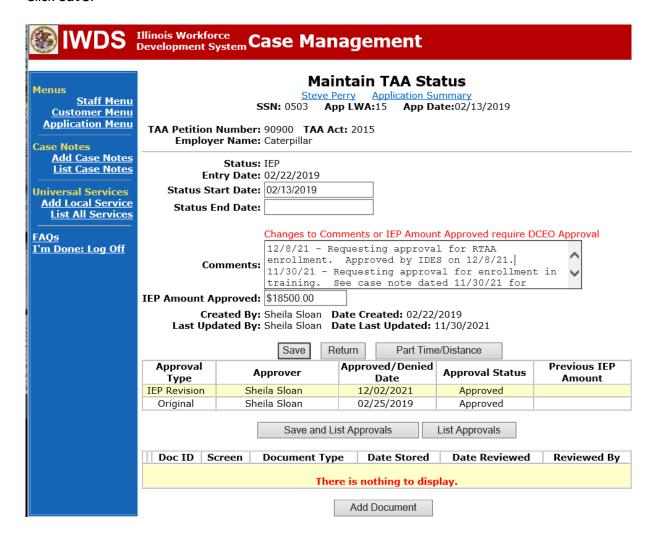Click on **List TAA Status** on the **Application Menu** on the **TAA Application** for the participant.

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

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

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

Status: IEP
Entry Date: 02/22/2019
Status Start Date: 02/13/2019
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: $18500.00

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

[Save]   [Return]   [Part Time/Distance]

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	

[Save and List Approvals]   [List Approvals]

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

[Add Document]

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: ▮	2. Modification #: ▮
3. Date of Modification Request: ▮/▮/▮	4. Date Modification to Take Effect: ▮/▮/▮

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.

☐ Invoking Equitable Tolling   Justification: ▮

☐ Waiver Change:	☐ Criteria Change	☐ Date Extension	☐ Revocation

☐ Additional service(s) List Service(s): ▮	☐ End Service List Service(s): ▮
☐ Date Extension Reason: ▮ Current End Date: ▮/▮/▮ New End Date: ▮/▮/▮	☐ Switch to a New Training Program Reason: ▮ Current Training Institution: ▮ Current Training Program: ▮ New Training Institution: ▮ New Training Program: ▮
☐ Changes in Cost Reason: ▮	☐ Change in Full-Time/Part-Time Status Reason: ▮
☐ Potential Suspension Start Date: ▮/▮/▮	☐ Switch in On-Site/Online Status
☐ Vacation Break Start Date: ▮/▮/▮ End Date: ▮/▮/▮	☐ Final Cost Reconciliation ☐ Other ▮
☐ Switch from Transportation to Subsistence	☐ Switch from Subsistence to Transportation

6. How does the modification affect the total IEP cost?

Increase $▮	Decrease $▮	☐ No Change	New Total IEP Amount $▮

7. Documentation to support Modification: (Mark all that apply)

☐ Training institution documentation	☐ Participant documentation/request	☐ File Audit

☐ Other: List documentation: ▮

8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)

Number of TRA weeks paid: ▮   Number of eligible TRA weeks remaining: ▮

With this modification, the participant has enough remaining weeks of   ☐ Yes ☐ No
TRA eligibility to complete the training?

If no, has the participant provided documentation demonstrating
he/she has the financial resources to support himself/herself   ☐ Yes ☐ No
through the completion of the training?

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.

Click **Add Enrolled Service.**

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: TAA

< Back   Next >

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**.

Select Service Level and Start Date

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

Title: TAA
*Service Level: Employment and Case Management
*Start Date: 11/1/2021   ×

< 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.

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.

Click **Save**.

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.
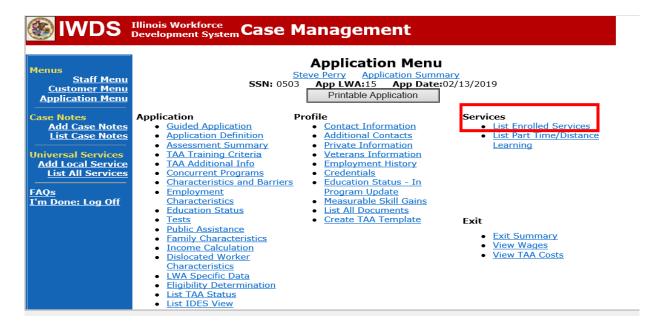
Click **Save and Return**.

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

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.
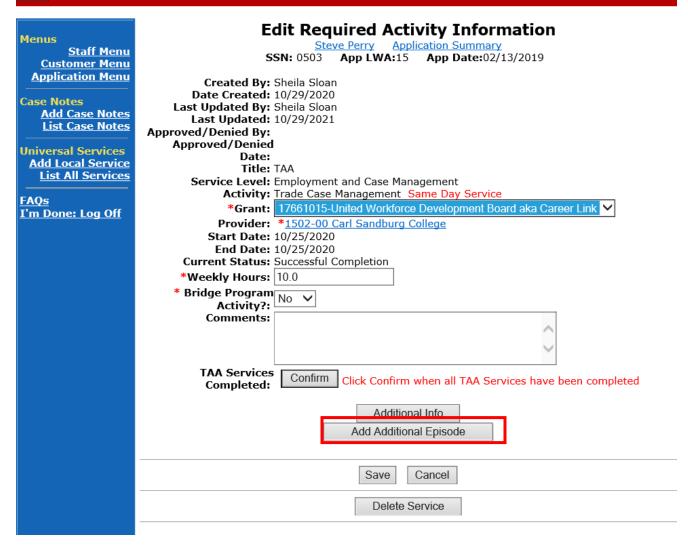
Click on **Trade Case Management – TAA.**

IWDS Illinois Workforce Development System **Case Management**

Services

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

| Add Enrolled Service | Printable Services | Return |

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Staff Menu
Customer Menu
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Case Notes
Add Case Notes
List Case Notes

Universal Services
Add Local Service
List All Services

FAQs
I'm Done: Log Off

3 found   Page 1 of 1

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

Page 1 of 1

| Add Enrolled Service | Printable Services | Return |

Click **Add Additional Episode**.

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.

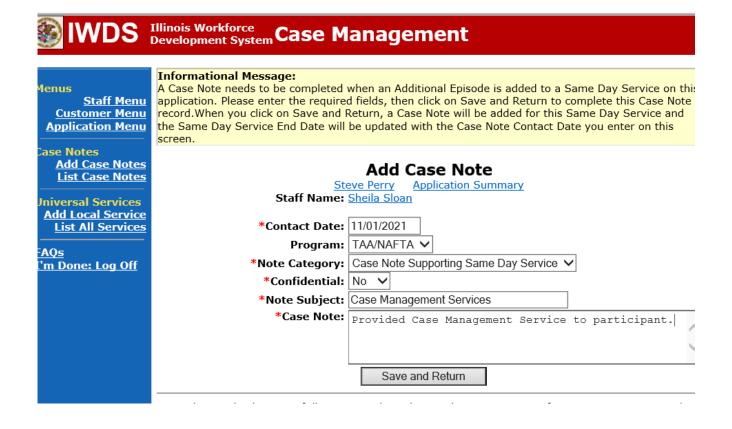**Program** – Select **TAA/NAFTA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

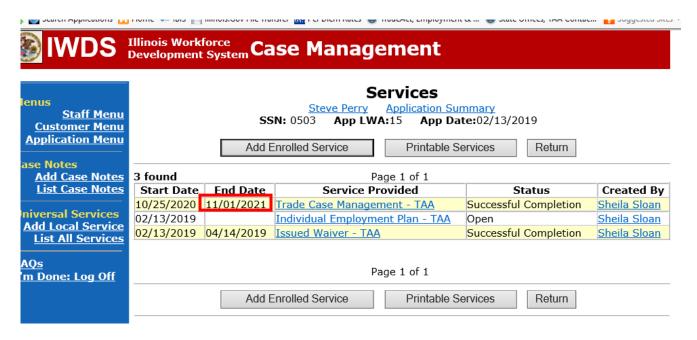**Confidential** – Select **Yes** or **No** to indicate if the case note is confidential.

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**.

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.
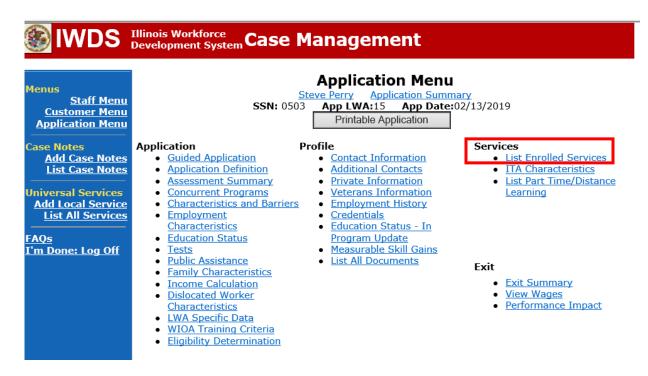

WIOA Application: No entry.

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.

Click **Add Enrolled Service**.

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

Select **Career Services** for **Service Level** from the drop down list.
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: 1DC
*Service Level: Career Services
*Start Date: 11/01/2021

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Cancel

Menus
Staff Menu
Customer Menu
Application Menu

Case Notes
Add Case Notes
List Case Notes

Universal Services
Add Local Service
List All Services

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

IWDS Illinois Workforce Development System **Case Management**

Select Activity

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

Title: 1DC
Service Level: Career Services
*Activity: Career Planning (Case Management)
Start Date: 11/01/2021

< Back   Next >

Cancel

Menus
Staff Menu
Customer Menu
Application Menu

Case Notes
Add Case Notes
List Case Notes

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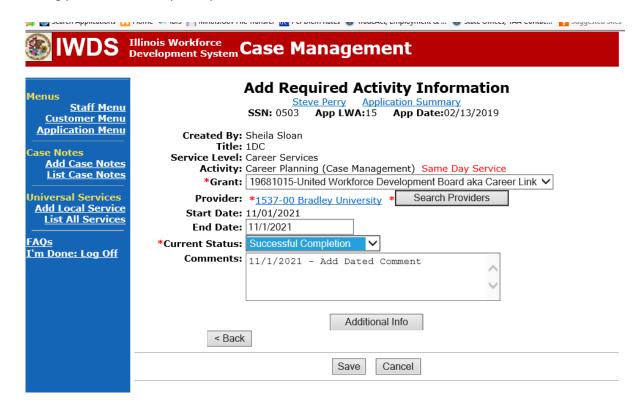**List All Services**

FAQs
I'm Done: Log Off

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.

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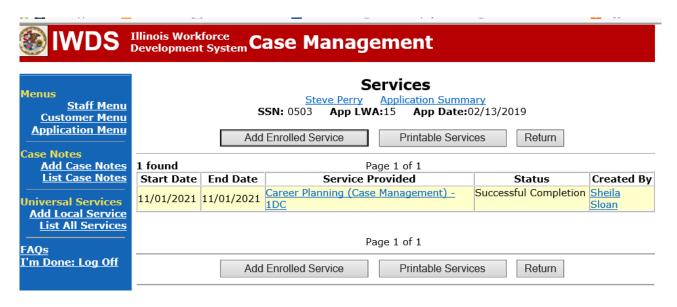
Case Note – Enter a detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.

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**.
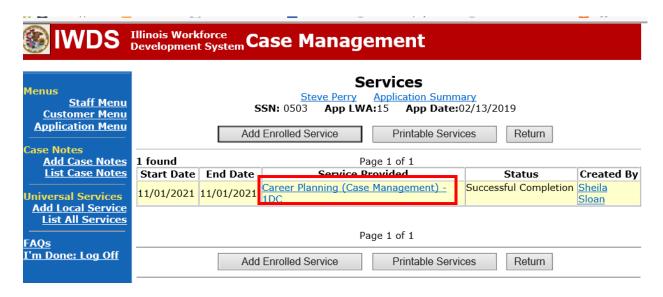

WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).
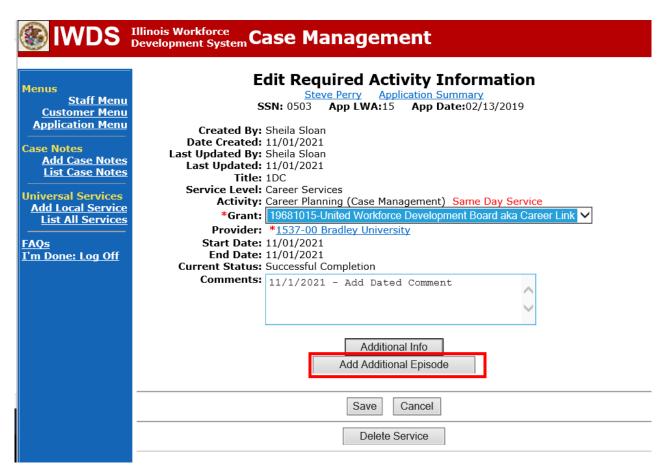
Click **List Enrolled Services** on the **Application Menu** on the **WIOA Application** for the participant.

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

Click **Add Additional Episode.**

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.

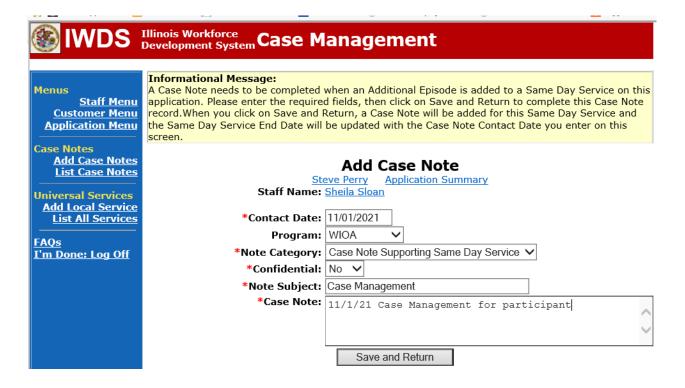**Program** – Select **WIOA** from the drop down list.

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**.

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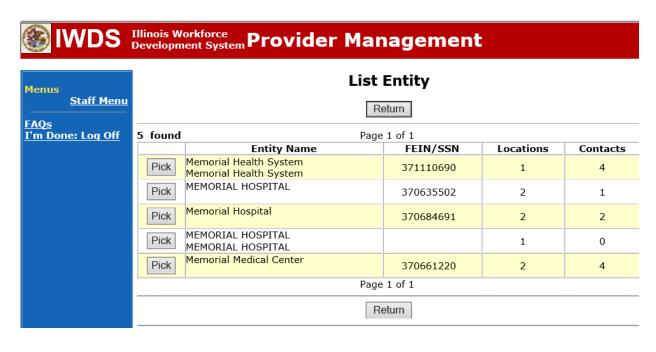

Under List Work History, click **Add Job**.

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.

DETS ID	[ ] Search
TAA Petition:	[ ] - [ ] Verify TAA Petition Number
***Employer Name:**	[ ] Search
***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:**	[ ] Search
Description:	
***O*Net(SOC):**	[ ] Search
Description:	

Save   Cancel

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

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

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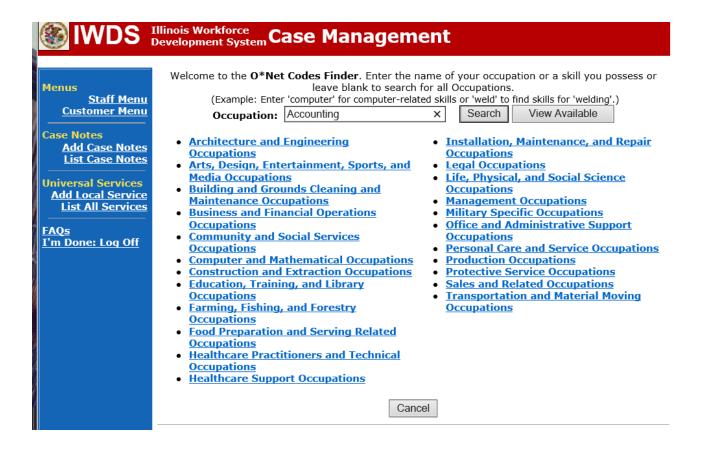Enter the industry.
Click **Search.**

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

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

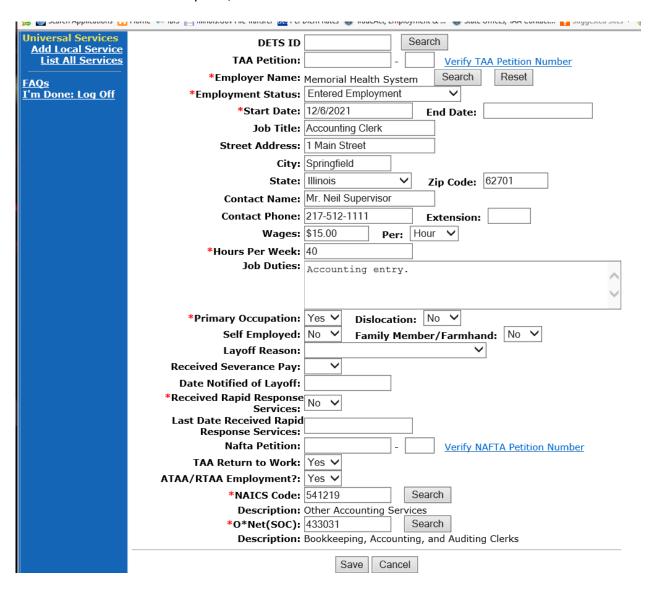Click **Pick** beside the occupational that matches the employment.
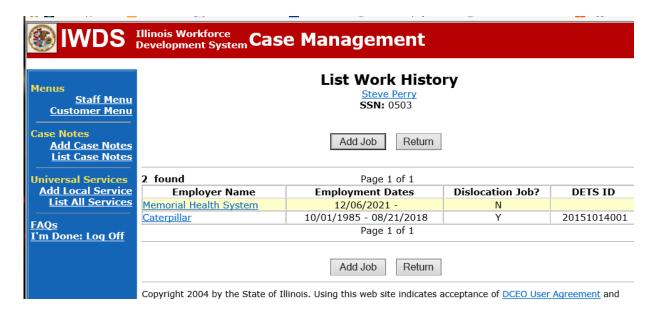
Make sure to answer the following questions:

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 [ ] Search

TAA Petition: [ ] - [ ] Verify TAA Petition Number

*Employer Name: Memorial Health System Search   Reset

*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   Search

Description: Other Accounting Services

*O*Net(SOC): 433031   Search

Description: Bookkeeping, Accounting, and Auditing Clerks

Save   Cancel

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

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

Click **Add TAA Status**.

IWDS Illinois Workforce Development System Case Management

List TAA Status

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

[Add TAA Status]   [Return]

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
View	12/01/2021		In Training		Sheila Sloan	12/02/2021
View	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/02/2021
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	11/30/2021

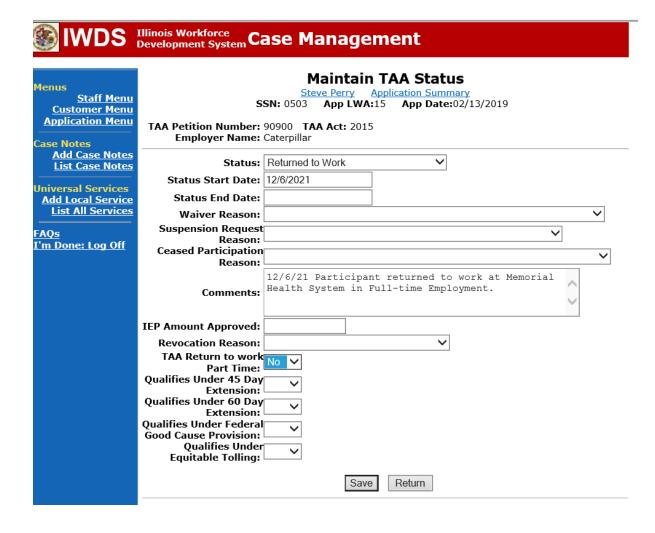[Add TAA Status]   [Return]

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".
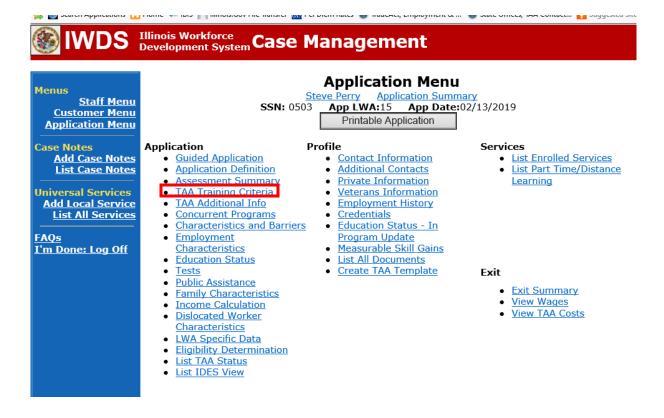
Click **Save.**
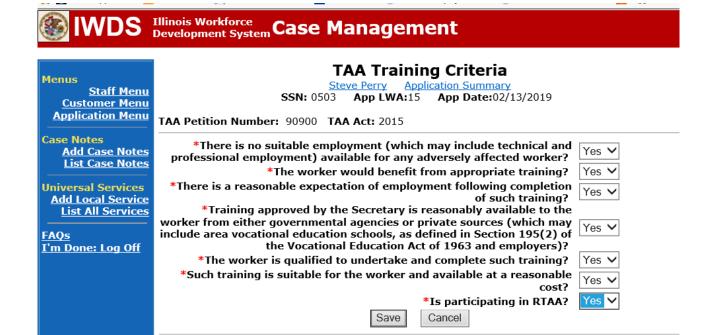
The **Returned to Work Status** has been added.

IWDS Illinois Workforce Development System Case Management

Informational Message:
Update Successful

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

[Add TAA Status]   [Return]

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
View	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
View	12/01/2021		In Training		Sheila Sloan	12/02/2021
View	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/02/2021
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	11/30/2021

[Add TAA Status]   [Return]

Menus
Staff Menu
Customer Menu
Application Menu

Case Notes
Add Case Notes
List Case Notes

Universal Services
Add Local Service
List All Services

FAQs
I'm Done: Log Off

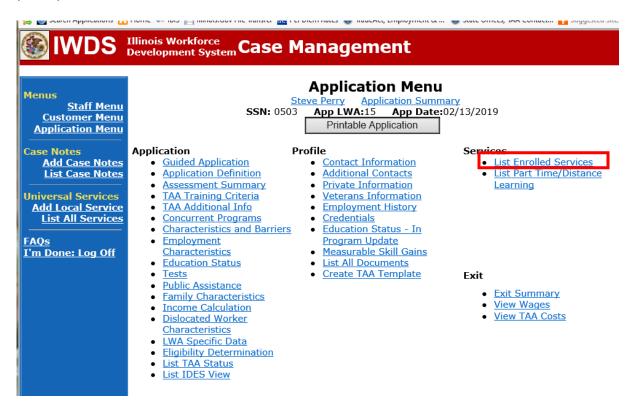Once IDES approves the **RTAA Application** do the following:

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

Update the answer to the last question "**Is participant in RTAA?**" with "Yes".
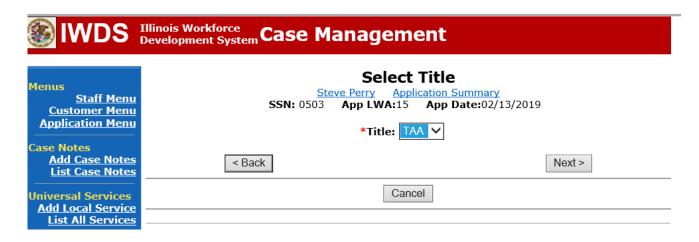Click **Save**.

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

Click **Add Enrolled Service**.

IWDS Illinois Workforce Development System Case Management

Services

Steve Perry   Application Summary

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

Add Enrolled Service	Printable Services	Return

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Add Local Service
List All Services

FAQs
I'm Done: Log Off

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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
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

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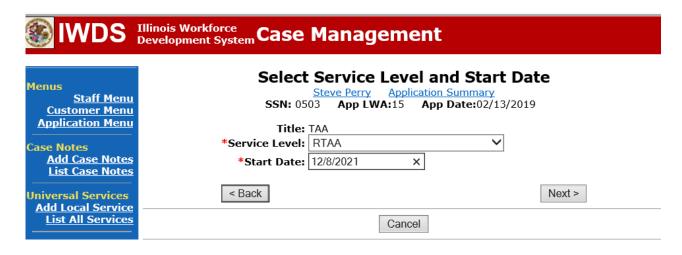|		
Add Enrolled Service	Printable Services	Return

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

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)
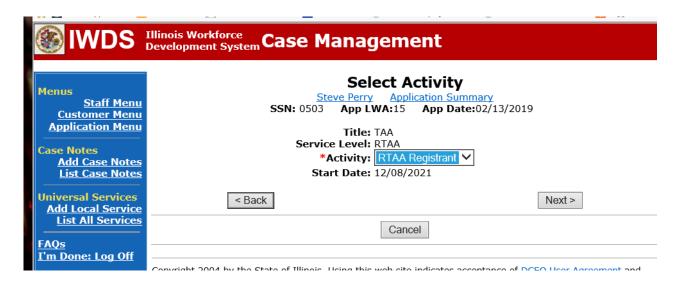

This is the box on the **RTAA Application** for IDES approval. The date here must be the start date of the **RTAA Service Record** in IWDS.
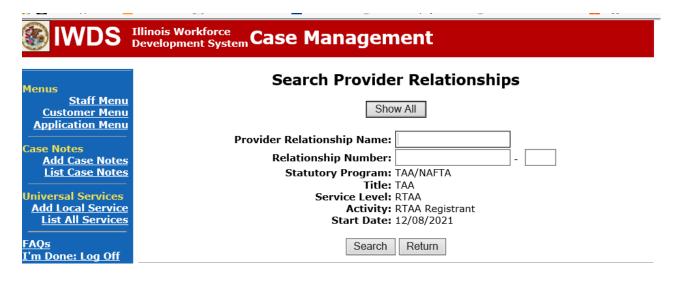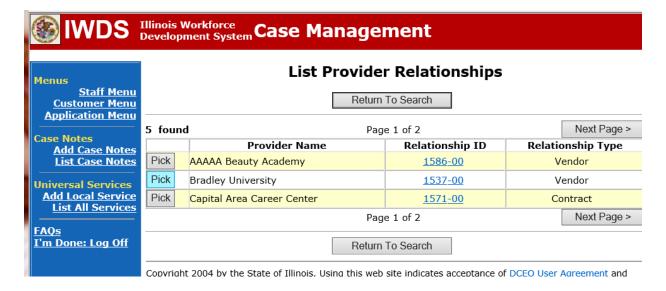

Click **Next**.

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

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

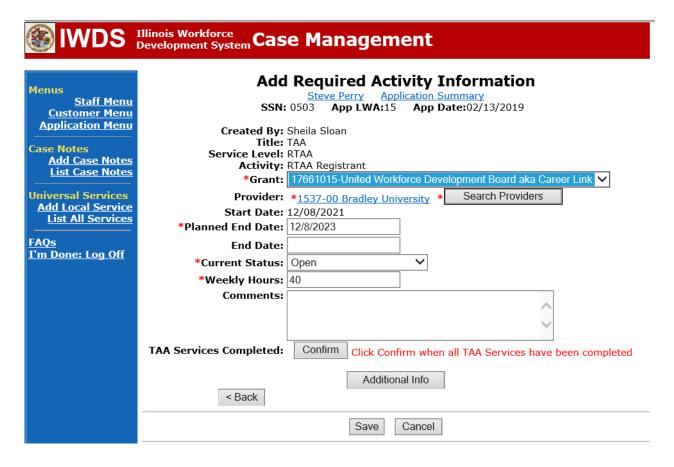Click **Pick** beside the appropriate provider.

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.

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**.

Click **Save**.

The **RTAA Service Record** has been added.

The 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

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Start Date	End Date	Service Provided	Status	Created By
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

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Menus
Staff Menu
Customer Menu
Application Menu

Case Notes
Add Case Notes
List Case Notes

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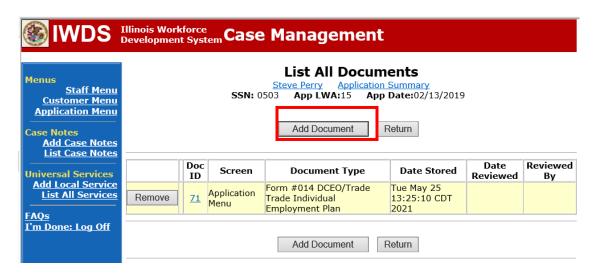**List All Services**

FAQs
I'm Done: Log Off

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).
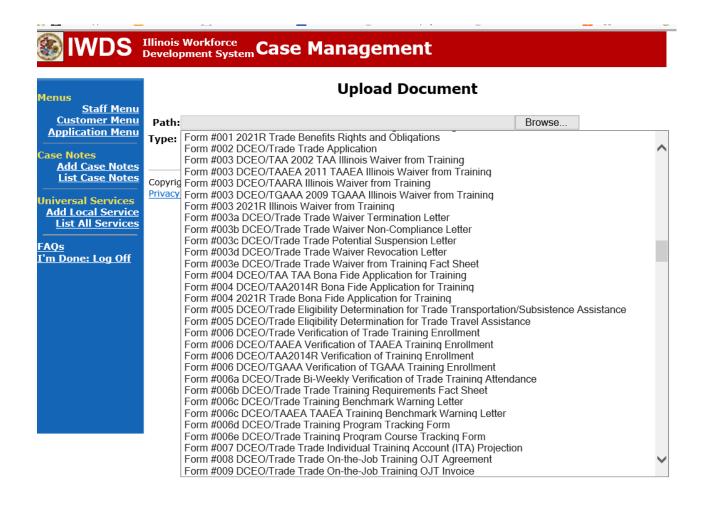

Click **Add Document**.

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.**

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.