

## PRE-REQUISITE TRAINING

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

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

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

Enter the **IEP Service Record** by selecting **List Enrolled Services** under the **Services** section on the **Application Menu** on the **TAA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top, the header reads "IWDS Illinois Workforce Development System Case Management". Below this, the user's name "Steve Perry" and "Application Summary" are displayed, along with "SSN: 0503", "App LWA:15", and "App Date: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. Other links in the "Services" column include "List Part Time/Distance Learning". The "Application" column lists various application-related links, and the "Profile" column lists personal information links. A left-hand navigation menu includes "Menus", "Case Notes", "Universal Services", and "FAQs".

Click **Add Enrolled Service**.

The screenshot shows the "Services" section of the application menu. At the top, the user's name "Steve Perry" and "Application Summary" are displayed, along with "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". Below this, there are three buttons: "Add Enrolled Service" (highlighted with a red box), "Printable Services", and "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](#)
  - [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**

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

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

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

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

IEP Amount Approved:

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

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

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

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

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

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


Add TAA Status Return

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

Add TAA Status Return

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

Click **Save**.


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:**   
**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.					

**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 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.			
<input type="checkbox"/> Invoking Equitable Tolling    Justification: _____			
<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="checkbox"/> End Service List Service(s): _____	
<input type="checkbox"/> Date Extension Reason: _____ Current End Date: ____/____/____ New End Date: ____/____/____		<input type="checkbox"/> Switch to a New Training Program Reason: _____ Current Training Institution: _____ Current Training Program: _____ New Training Institution: _____ New Training Program: _____	
<input type="checkbox"/> Changes in Cost Reason: _____		<input type="checkbox"/> Change in Full-Time/Part-Time Status Reason: _____	
<input type="checkbox"/> Potential Suspension    Start Date: ____/____/____		<input type="checkbox"/> Switch in On-Site/Online Status	
<input type="checkbox"/> Vacation Break Start Date: ____/____/____    End Date: ____/____/____		<input type="checkbox"/> Final Cost Reconciliation <input type="checkbox"/> Other _____	
<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 \$ _____	Decrease \$ _____	<input type="checkbox"/> No Change	New Total IEP Amount \$ _____
7. Documentation to support Modification: (Mark all that apply)			
<input type="checkbox"/> Training institution documentation		<input type="checkbox"/> Participant documentation/request	
<input type="checkbox"/> File Audit			
<input type="checkbox"/> Other: List documentation: _____			
8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)			
Number of TRA weeks paid: _____		Number of eligible TRA weeks remaining: _____	
With this modification, the participant has enough remaining weeks of TRA eligibility to complete the training? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If no, has the participant provided documentation demonstrating he/she has the financial resources to support himself/herself through the completion of the training? <input type="checkbox"/> Yes <input type="checkbox"/> No			

8 words

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

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

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

Add **Case Management Services** in IWDS on the WIOA and Trade applications based on the following:

For participants covered by certifications numbered up to 97,999:

Trade Application:

### Trade Application Entry (Initial Trade Case Management Service)

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

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

Click **Add Enrolled Service**.





**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

0 found Page 1 of 1

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

Page 1 of 1

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



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

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

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

### Select Title

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

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

\*Title:

Select **Employment and Case Management** for the **Service Level** from the drop down list.  
 Enter **Start Date**. (Date of entry or date service first provided).  
 Click **Next**.



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

### Select Service Level and Start Date

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

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

Title: TAA

\*Service Level:

\*Start Date:

< Back

Next >

Cancel

Complete all required fields:

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

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

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

**Weekly Hours** – enter estimated number of weekly hours case management is being provided.

**Bridge Program Activity** – Usually marked "No".

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

The screenshot displays the 'IWDS Illinois Workforce Development System Case Management' interface. The main heading is 'Add Required Activity Information' for 'Steve Perry' with an 'Application Summary' link. Key information includes SSN: 0503, App LWA: 15, and App Date: 02/13/2019. The form fields are as follows: 'Created By: Sheila Sloan', 'Title: TAA', 'Service Level: Employment and Case Management', 'Activity: Trade Case Management Same Day Service', '\*Grant: 17661015-United Workforce Development Board aka Career Link', 'Provider: Search Providers', 'Start Date: 10/25/2020', '\*End Date: [empty]', '\*Current Status: Open', '\*Weekly Hours: [empty]', '\* Bridge Program Activity?: No', and 'Comments: [empty text area]'. At the bottom, there is a 'Confirm' button with the instruction 'Click Confirm when all TAA Services have been completed', an 'Additional Info' button, a '< Back' button, and 'Save' and 'Cancel' buttons. A blue sidebar on the left contains navigation links for Menus, 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" (No), and "\*Note Subject" (Case Management). The "\*Case Note" field contains the text "11/1/21 Case Management Provided to participant." and is followed by a "Save and Return" button.

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

3 found Page 1 of 1

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

**Services**

- List Enrolled Services
- List Part Time/Distance Learning

**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

**Exit**

- Exit Summary
- View Wages
- View TAA Costs

Click on Trade Case Management – TAA.

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

---

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

---

**3 found** Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
10/25/2020	10/25/2020	<b>Trade Case Management - TAA</b>	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

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**

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

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

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

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

**Informational Message:**  
A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

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

**\*Contact Date:** 11/01/2021  
**Program:** TAA/NAFTA  
**\*Note Category:** Case Note Supporting Same Day Service  
**\*Confidential:** No  
**\*Note Subject:** Case Management Services  
**\*Case Note:** Provided Case Management Service to participant.

**Save and Return**

NOTE: The End Date for the Trade Case Management – TAA Service Record has updated with the current date of the entry that was just made.

Search Applications Home IWDS Illinois Workforce Development System Case Management

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

Add Enrolled Service Printable Services Return

3 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
10/25/2020	11/01/2021	<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

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

WIOA Application: No entry.

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

Trade Application: No entry.

WIOA Application:

**WIOA Application Entry (Initial Career Planning (Case Management) Service Record).**

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

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header, the main content area is titled "Application Menu" and includes the user name "Steve Perry" and a link to "Application Summary". The user's SSN is 0503, the application LWA is 15, and the application date is 02/13/2019. A "Printable Application" button is visible. On the left, there is a blue sidebar menu with sections for "Menus" (Staff, Customer, Application), "Case Notes" (Add, List), "Universal Services" (Add, List), and "FAQs" (Log Off). The main content area is divided into three columns: "Application" (with links like Guided Application, Application Definition, Assessment Summary, etc.), "Profile" (with links like Contact Information, Additional Contacts, Private Information, etc.), and "Services" (with links like List Enrolled Services, ITA Characteristics, List Part Time/Distance Learning). The "List Enrolled Services" link in the Services column is highlighted with a red box. An "Exit" section is also present with links to 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 'Select Service Level and Start Date' 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 categories: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), 'Universal Services' (Add Local Service, List All Services), and 'FAQs'. The main content area displays the user's name 'Steve Perry' and 'Application Summary' as links, along with 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. The 'Title' is '1DC'. The '\*Service Level' dropdown menu is set to 'Career Services'. The '\*Start Date' is '11/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

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

The screenshot shows the 'Select Activity' screen in the IWDS Case Management system. The header is identical to the previous screen. The sidebar menu is also identical. The main content area displays the same user information and title. The 'Service Level' is 'Career Services'. The '\*Activity' dropdown menu is set to 'Career Planning (Case Management)'. The 'Start Date' is '11/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Complete all required fields:

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

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

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

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

The screenshot shows the IWDS Case Management interface. At the top, there is a navigation bar with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. Below this is a blue sidebar menu with sections for 'Menus', 'Case Notes', 'Universal Services', and 'FAQs'. The main content area is titled 'Add Required Activity Information' and displays details for a case for 'Steve Perry'. The form includes fields for 'Created By', 'Title', 'Service Level', 'Activity', 'Grant', 'Provider', 'Start Date', 'End Date', 'Current Status', and 'Comments'. The 'Current Status' is set to 'Successful Completion'. There are buttons for '< Back', 'Additional Info', 'Save', and 'Cancel'.

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

**Created By:** Sheila Sloan  
**Title:** 1DC  
**Service Level:** Career Services  
**Activity:** Career Planning (Case Management) **Same Day Service**  
**\*Grant:** 19681015-United Workforce Development Board aka Career Link  
**Provider:** \*1537-00 Bradley University \* Search Providers  
**Start Date:** 11/01/2021  
**End Date:** 11/1/2021  
**\*Current Status:** Successful Completion  
**Comments:** 11/1/2021 - Add Dated Comment

< 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 **WIOA** from the drop down list.

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

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

**Note Subject** – Enter a subject for the case note that describes what service is being provided.

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

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. At the top, there is a red header with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left side, there is a blue navigation menu with the following items: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), 'Universal Services' (Add Local Service, List All Services), and 'FAQs' (I'm Done: Log Off). The main content area features a yellow informational message box stating: 'Informational Message: A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.' Below this message is the 'Add Case Note' form. The form includes the following fields: 'Staff Name: Sheila Sloan' (with links for Steve Perry and Application Summary), 'Contact Date: 11/01/2021', 'Program: WIOA' (dropdown menu), '\*Note Category: Case Note Supporting Same Day Service' (dropdown menu), '\*Confidential: No' (dropdown menu), '\*Note Subject: Case Management' (text input field), and '\*Case Note: Provided case management to participant today.' (text area with a scroll bar). 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**

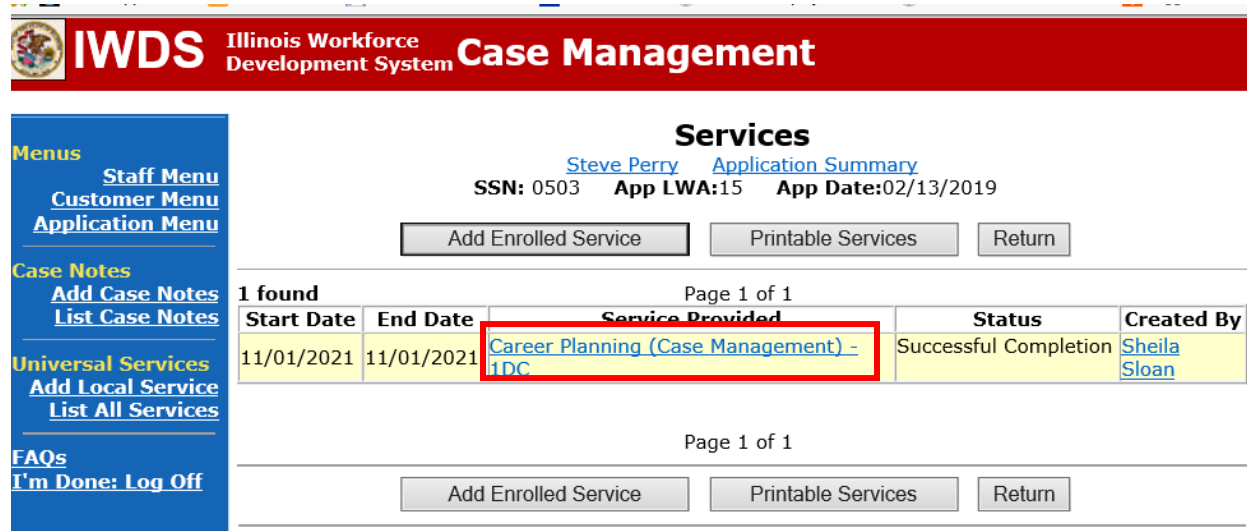
- List Enrolled Services
- ITA Characteristics
- List Part Time/Distance Learning

**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 'Illinois Workforce Development System Case Management'. The user is 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'.

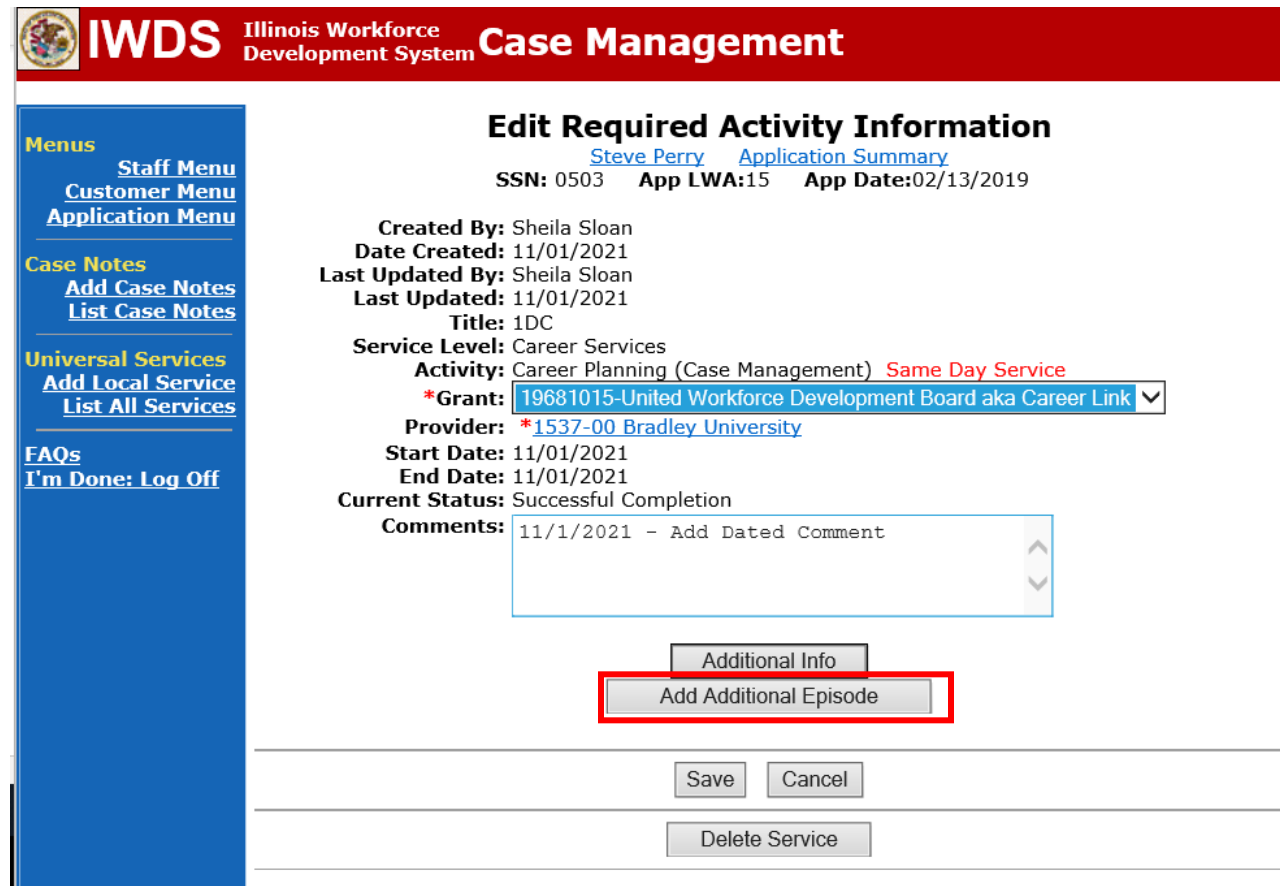
**Services**  
Steve Perry Application Summary  
SSN: 0503 App LWA:15 App Date:02/13/2019

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

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

Created By: Sheila Sloan  
Date Created: 11/01/2021  
Last Updated By: Sheila Sloan  
Last Updated: 11/01/2021  
Title: 1DC  
Service Level: Career Services  
Activity: Career Planning (Case Management) Same Day Service  
\*Grant: 19681015-United Workforce Development Board aka Career Link  
Provider: \*1537-00 Bradley University  
Start Date: 11/01/2021  
End Date: 11/01/2021  
Current Status: Successful Completion  
Comments: 11/1/2021 - Add Dated Comment

Additional Info  
Add Additional Episode

Save Cancel  
Delete Service

Complete the following fields:

**Contact Date** – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

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

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

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

**Note Subject** – Enter a subject for the case note that describes what service is being provided.

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

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. At the top, a red header bar 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: "Informational Message: A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen." Below this message is the "Add Case Note" form. The form includes the following fields: "Staff Name" (Steve Perry, Application Summary) with a sub-field for "Sheila Sloan"; "\*Contact Date" (11/01/2021); "Program" (WIOA); "\*Note Category" (Case Note Supporting Same Day Service); "\*Confidential" (No); "\*Note Subject" (Case Management); and "\*Case Note" (11/1/21 Case Management for participant). A "Save and Return" button is located at the bottom of the form.

Update the TAA Training Criteria screen in IWDS.

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

## PRE-REQUISITE


For **Pre-Requisite Training Service Records**, a separate record must be entered for each course being taken. In addition, the **Comment Box** on each **Pre-requisite Training Service Record** must contain the name of the specific course and the semester it is being taken.

To enter Pre-Requisite Training:

Select **List Enrolled Services** on the **Application Menu** for the participant.

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

Click **Add Enrolled Service**.

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

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

**Add Enrolled Service** Printable Services Return


6 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/01/2021		<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>
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

**Add Enrolled Service** Printable Services Return

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

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

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

\*Title: **TAA** ▼

< Back Next >

Cancel


Select **Job Training** from the drop down for **Service Level**.  
Enter **Start Date** of the **Pre-Requisite Training**.  
Click **Next**.

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

Select **Prerequisite Training** from the drop down for **Activity**.  
Click **Next**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with options: Staff Menu, Customer Menu, Application Menu, Case Notes (Add Case Notes, List Case Notes), Universal Services (Add Local Service, List All Services), and FAQs. The main content area is titled 'Select Activity' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: TAA'. The 'Service Level:' is 'Job Training'. The '\*Activity:' dropdown is set to 'Prerequisite Training'. The 'Start Date:' is '12/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

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

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

**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:** 12/02/2021  
**Last Updated By:** Sheila Sloan  
**Last Updated:** 12/02/2021  
**Approved/Denied By:** Sheila Sloan

**Approved/Denied**  
**Date:**  
**Title:** TAA  
**Service Level:** Job Training  
**Activity:** Prerequisite Training  
**\*Grant:** 17661015-United Workforce Development Board aka Career Link ▼

**ITA Funded Training:** No  
**Provider:** \*1537-00 Bradley University  
**\*CIP Code:** 520305     
**CIP Description:** Accounting And Business/Management  
**\*O\*Net Code:** 433031      Requires O\*Net  
**Start Date:** 12/01/2021  
**\*Planned End Date:** 05/12/2022  
**End Date:**   
**\*Current Status:** Open ▼  
**\*Weekly Hours:** 4.0  
**Comments:** Accounting 100

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

---

---

Click **Search Providers** to select the training provider where the participant will be attending for the training.

Click **Show All** or enter the Provider name to search for the training provider.

IWDS Illinois Workforce Development System Case Management

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

### Search Provider Relationships

Provider Relationship Name:

Relationship Number:  -

Statutory Program: TAA/NAFTA  
 Title: TAA  
 Service Level: Job Training  
 Activity: Occupational Skills Training  
 Start Date: 12/01/2021

Select the appropriate training provider by clicking **Pick** beside the provider name.

IWDS Illinois Workforce Development System Case Management

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

### List Provider Relationships

**6 found** Page 1 of 2

	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

Page 1 of 2



Click **Search** for the CIP Code to select the appropriate **CIP Code** for the training the participant will be attending.

Enter an **Occupation** in the Box and Click **Search** or select from the categories listed.

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, on the left, is a blue sidebar menu with the following items: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), "FAQs", and "I'm Done: Log Off". The main content area is white and contains the following text: "Welcome to the **CIP Codes Finder**. Enter the name of your occupation or a skill you possess or leave blank to search for all Occupations. (Example: Enter 'computer' for computer-related skills or 'weld' to find skills for 'welding'.) Occupation: [input box] [Search] [View Available]". Below this text is a list of 40 blue hyperlinks representing various occupation categories, such as "Agriculture, Agriculture Operations, And Related Sciences", "Architecture And Related Services", "Area, Ethnic, Cultural, Gender, and Group Studies", "Basic Skills and Developmental/Remedial Education", "Biological And Biomedical Sciences", "Business, Management, Marketing, And Related Support Services", "Citizenship Activities", "Communication, Journalism, And Related Programs", "Communications Technologies/ Technicians And Support Services", "Computer And Information Sciences And Support Services", "Construction Trades", "Education", "Engineering", "Engineering Technologies and Engineering-Related Fields", "English Language And Literature/ Letters", "Family And Consumer Sciences/Human Sciences", "Foreign Languages, Literatures, And Linguistics", "Health Professions And Related Programs", "Health- Related Knowledge And Skills", "High School/ Secondary Diplomas And Certificates", "History", "Homeland Security, Law Enforcement, Firefighting and Related Protective Services", "Interpersonal And Social Skills", and "Langue Et Littatures Franaises/ Lettres".

Click **Pick** for the occupation the participant will be training for.

**Case Management**

Occupation:

Pick	Accounting	520301
Pick	Accounting And Business/Management	520305
Pick	Accounting And Computer Science	301601
Pick	Accounting And Finance	520304
Pick	Accounting And Related Services, Other	520399
Pick	Accounting Technology/Technician And Bookkeeping	520302

Click **Search** for the **O\*Net Code** for the training the participant will be attending. Enter an **Occupation** in the Box and Click **Search** or select from the categories listed.

**Case Management**

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** next to the occupation that the participant is attending training for.

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, there is a search bar with "Occupation:" followed by a text input field containing "Accounting" and a "Search" button. Below the search bar, there is a table with one row of results. The first cell of the row is a "Pick" button. The second cell contains the text "Bookkeeping, Accounting, and Auditing Clerks". The third cell contains the number "433031". The fourth cell contains the word "Growth". Below the table, there are two buttons: "Return to Finder" and "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](#)

Occupation: Accounting [x] Search

Pick	Bookkeeping, Accounting, and Auditing Clerks	433031	Growth
------	--	--------	--------

Return to Finder Cancel

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

Enter the **Planned End Date** for the training.  
 Enter the **Weekly Hours** it is estimated the participant will be attending training.  
 Select the appropriate answer for the **Bridge Program Activity**. Unless the participant is enrolled in a specific Bridge type of program, this should be marked "No".  
 Enter any specific comments in the **Comment Box** that are necessary. NOTE: For Pre-Requisite Training, the courses being taken must be entered in the **Comment Box**.  
 Click **Save**. This will set the record to a pending approval status.

IWDS
Illinois Workforce Development System
Case Management

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

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

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

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

### Add Required Activity Information

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

Created By: Sheila Sloan  
 Title: TAA  
 Service Level: Job Training  
 Activity: Occupational Skills Training  
 \*Grant: 17661015-United Workforce Development Board aka Career Link ▼

ITA Funded Training: No  
 Provider: \*1537-00 [Bradley University](#) \*   
 \*CIP Code: 520305   
 CIP Description: Accounting And Business/Management  
 \*O\*Net Code: 433031  Requires O\*Net  
 Start Date: 12/01/2021  
 \*Planned End Date: 12/12/2023  
 End Date:  
 Current Status: Pending Approval  
 \*Weekly Hours: 12   
 \*Bridge Program Activity? No ▼  
 Comments:

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

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

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

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

**Case Management**

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

Printable Application

**Application Menu**

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

**Profile**

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

**Services**

- List Enrolled Services
- List Part Time/Distance Learning

**Exit**

- Exit Summary
- View Wages
- View TAA Costs

**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**.

**Services**

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

Add Enrolled Service Printable Services Return

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

**Case Management**

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

\*Title: TAA

< Back Next >

Cancel

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

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

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

Click **Next**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. A blue sidebar on the left contains navigation links under 'Menus', 'Case Notes', 'Universal Services', and 'FAQs'. The main content area is titled 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays the user's SSN (0503), App LWA (15), and App Date (02/13/2019). The 'Title' is set to 'TAA'. The '\*Service Level' dropdown is set to 'Job Training'. The '\*Start Date' is '12/1/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'. A copyright notice at the bottom states: 'Copyright 2004 by the State of Illinois. Using this web site indicates acceptance of [DCEO User Agreement](#) and [IWDS Privacy Notice](#).'

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

Click **Next**.

The screenshot shows the IWDS Case Management interface at the 'Select Activity' step. The header and sidebar are identical to the previous screen. The main content area is titled 'Select Activity' and includes links for 'Steve Perry' and 'Application Summary'. It displays the user's SSN (0503), App LWA (15), and App Date (02/13/2019). The 'Title' is 'TAA', 'Service Level' is 'Job Training', and '\*Activity' is 'Travel in Training'. The 'Start Date' is '12/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Click on **Select Provider**

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

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

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

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

**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](#)

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

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

**Search Provider Relationships**

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

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

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

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

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

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

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

### List Provider Relationships

[Return To Search](#)

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

	Provider Name	Relationship ID	Relationship Type
<a href="#">Pick</a>	AAAAA Beauty Academy	<a href="#">1586-00</a>	Vendor
<a href="#">Pick</a>	Bradley University	<a href="#">1537-00</a>	Vendor
<a href="#">Pick</a>	Gingers Community College	<a href="#">gingers-00</a>	Contract

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

[Return To Search](#)

Click **Save**

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

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

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

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

### Add Required Activity Information

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

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


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

[Additional Info](#)

[< Back](#)



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

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

**Informational Message:**  
The record has been added.

**Services**

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

**6 found** Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/01/2021		<a href="#">Occupational Skills Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Travel in Training - TAA</a>	Pending Approval	<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

Upload the **IEP and IEP Modification Form, Training Enrollment Form or WBT Agreement, Transportation-Subsistence Form, Google Maps printout, Tracking Form**, and any other relevant documents in IWDS.

To upload documents in IWDS, click on **List All Documents** under the **Profile** section on the **Application Menu**. Make sure you are on the correct application for the participant (WIOA or TAA).

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

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

**Application**

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

**Profile**

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

**Services**

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

**Exit**

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

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

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

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

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

Click **Add Document**.

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

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

	Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
<input type="button" value="Remove"/>	71	Application Menu	Form #014 DCEO/Trade Individual Employment Plan	Tue May 25 13:25:10 CDT 2021		

Click **Browse** to search for the document to upload. Once you find the file, double click the document or select it and click **Open**.

Then select the **Type** from the drop down options. There should be an option to select any of the Trade forms.

Each document can be uploaded separately or combined into a single document. If you upload the documents as one single document, select **Form #014 DCEO/Trade Trade Individual Employment Plan** as the **Type**. If you upload the documents as separate documents, select the appropriate name from the drop down options for **Type**.

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

### Upload Document

Path:  Browse...

Type:

Copyright [Privacy](#)

- Form #001 2021R Trade Benefits Rights and Obligations
- Form #002 DCEO/Trade Trade Application
- Form #003 DCEO/TAA 2002 TAA Illinois Waiver from Training
- Form #003 DCEO/TAAEA 2011 TAAEA Illinois Waiver from Training
- Form #003 DCEO/TAARA Illinois Waiver from Training
- Form #003 DCEO/TGAAA 2009 TGAAA Illinois Waiver from Training
- Form #003 2021R Illinois Waiver from Training
- Form #003a DCEO/Trade Trade Waiver Termination Letter
- Form #003b DCEO/Trade Trade Waiver Non-Compliance Letter
- Form #003c DCEO/Trade Trade Potential Suspension Letter
- Form #003d DCEO/Trade Trade Waiver Revocation Letter
- Form #003e DCEO/Trade Trade Waiver from Training Fact Sheet
- Form #004 DCEO/TAA TAA Bona Fide Application for Training
- Form #004 DCEO/TAA2014R Bona Fide Application for Training
- Form #004 2021R Trade Bona Fide Application for Training
- Form #005 DCEO/Trade Eligibility Determination for Trade Transportation/Subsistence Assistance
- Form #005 DCEO/Trade Eligibility Determination for Trade Travel Assistance
- Form #006 DCEO/Trade Verification of Trade Training Enrollment
- Form #006 DCEO/TAAEA Verification of TAAEA Training Enrollment
- Form #006 DCEO/TAA2014R Verification of Training Enrollment
- Form #006 DCEO/TGAAA Verification of TGAAA Training Enrollment
- Form #006a DCEO/Trade Bi-Weekly Verification of Trade Training Attendance
- Form #006b DCEO/Trade Trade Training Requirements Fact Sheet
- Form #006c DCEO/Trade Training Benchmark Warning Letter
- Form #006c DCEO/TAAEA TAAEA Training Benchmark Warning Letter
- Form #006d DCEO/Trade Training Program Tracking Form
- Form #006e DCEO/Trade Training Program Course Tracking Form
- Form #007 DCEO/Trade Trade Individual Training Account (ITA) Projection
- Form #008 DCEO/Trade Trade On-the-Job Training OJT Agreement
- Form #009 DCEO/Trade Trade On-the-Job Training OJT Invoice

## PART-TIME/DISTANCE LEARNING

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

To add a **Part Time Indicator**:

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

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

To add a Part Time Indicator:

Click **Add Part Time/Distance Learning**

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: Menus (Staff Menu, Customer Menu, Application Menu), Case Notes (Add Case Notes, List Case Notes), Universal Services (Add Local Service, List All Services), and FAQs. The main content area is titled 'Part Time/Full Time - Distance Learning History' and includes links for 'Steve Perry' and 'Application Summary'. Below these are fields for 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. There are two 'Add Part Time/Distance Learning' buttons and one 'Return' button. A table with columns 'Date', 'Type', 'Status Deleted?', 'Last Updated By', 'Date Created', and 'Date Updated' is shown, with a yellow message 'There are no records at this time.' in the center.

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

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

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

The screenshot shows the IWDS Case Management interface for 'Part Time/Full Time - Distance Learning Detail'. The header and sidebar are the same as in the previous screenshot. The main content area includes links for 'Steve Perry' and 'Application Summary', and fields for 'SSN: 0503', 'App LWA:15', and 'App Date:02/13/2019'. There are three fields: '\*Status Type:' with a dropdown menu showing 'Part Time Training' and 'Distance Learning', '\*Start Date:' with a date input field, and '\*Status:' with a dropdown menu. There are 'Save' and 'Cancel' buttons at the bottom.

Click **Save**.

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

**Part Time/Full Time - Distance Learning Detail**

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

\*Status Type: Part Time Training ▾  
\*Start Date: 12/1/2021  
\*Status: Yes ▾

Save Cancel

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

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

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

**Part Time/Full Time - Distance Learning History**

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

Add Part Time/Distance Learning Return

	Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
<a href="#">View</a>	12/01/2021	Part Time Training	Y	N	<a href="#">Sheila Sloan</a>	12/02/2021	12/02/2021

Add Part Time/Distance Learning Return

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

To add a **Distance Learning Indicator**:

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

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

### Part Time/Full Time - Distance Learning History

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

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

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

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

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

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

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

### Part Time/Full Time - Distance Learning Detail

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

\*Status Type:   
\*Start Date:   
\*Status:

Click **Save**.

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

**Part Time/Full Time - Distance Learning Detail**

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

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

Save Cancel

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

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

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

**Part Time/Full Time - Distance Learning History**

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

Add Part Time/Distance Learning Return

	Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
<a href="#">View</a>	12/01/2021	Distance Learning	Y	N	<a href="#">Sheila Sloan</a>	12/02/2021	12/02/2021
<a href="#">View</a>	12/01/2021	Part Time Training	Y	N	<a href="#">Sheila Sloan</a>	12/02/2021	12/02/2021

Add Part Time/Distance Learning Return

FAQs  
I'm Done: Log Off



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

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

**Body of Email:**

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

**Include information for the items below:**

**Participant Name:**

**Training Institution:**

**Training Program:**

**Total Training Weeks:**

**Start Date of Training Program:**

**Planned End Date of Training Program:**

**Training Cost:**

**Transportation/Subsistence Cost:**

**Total IEP Amount:**

**Justification:**

**State merit staff will do the following:**

1. Review the email, IWDS entries, and uploaded documents to ensure all entries are made as required and all documents are complete.
2. If issues are found, state merit staff will email the career planner and inform him/her of the issues that need addressed.
3. Once the issues have been addressed, the career planner will forward back the email from state merit staff and note that issues have been addressed.
4. State merit staff will review corrections.
5. Once all issues have been corrected, state merit staff will approve all service and status records and forward the email chain to the career planner to inform him/her approval.
6. If approval is not possible and the request is denied, state merit staff will direct the career planner on the next steps to take.