

POTENTIAL SUSPENSION REQUEST – PARTICIPANT ISSUED A WAIVER FROM TRAINING AND REFUSED SUITABLE EMPLOYMENT INSTRUCTIONS

Complete the **Trade Potential Suspension Letter Commerce/Trade Form #003c (Potential Suspension Letter)** marking the box for **Participant was provided a waiver from training and refused suitable employment.**

Send the **Potential Suspension Letter** to the participant.

The date of the letter must match the start date of entry of the **Potential Suspension Request Status Record.**

Trade Potential Suspension Letter

Date:

Participant Name:

Mailing Address:

City, State, Zip:

It has been determined you have not met all eligibility requirements to qualify for and maintain benefits in the Trade/TRA Program. Contact was previously made to inform you of this determination and request additional information or documentation. All documentation and information provided has been reviewed, however it does not support your continued participation and receipt of benefits.

This letter serves as notification that the Illinois Department of Employment Security will investigate your eligibility for benefits from the Trade/TRA Program due to the following reason:

Participant was provided a waiver from training and refused suitable employment.

Participant enrolled in training but failed to start.

Participant failed to maintain full-time or part-time (as appropriate) status in a training program. Participant failed to attend all scheduled training classes and other training activities scheduled by the training institution in any week of the training program.

Participant did not meet one of the qualifying requirements for eligibility in a Trade/TRA Program.

Participant is non-compliant with Trade training requirements (including alleged fraud).

Participant has failed to meet required Training Benchmarks and Completion TRA is in jeopardy.

Training Plan will be modified. Training Plan cannot be modified.

APPEAL RIGHTS
If you disagree with this determination, you may complete and submit a request for reconsideration/appeal. A letter will suffice if you do not have an agency form. Your request must be filed with the Illinois Department of Employment Security ("IDES") within thirty (30) calendar days after the date at the top of this letter. If the last day for filing your request is a day that IDES is closed, the request may be filed on the next day that IDES is open. Please file the request by mail to: IDES P.O. Box 19509 Springfield, IL 62794 or fax to: 217-557-4913. Any request submitted by mail must bear a postmark date within the applicable time limit for filing.

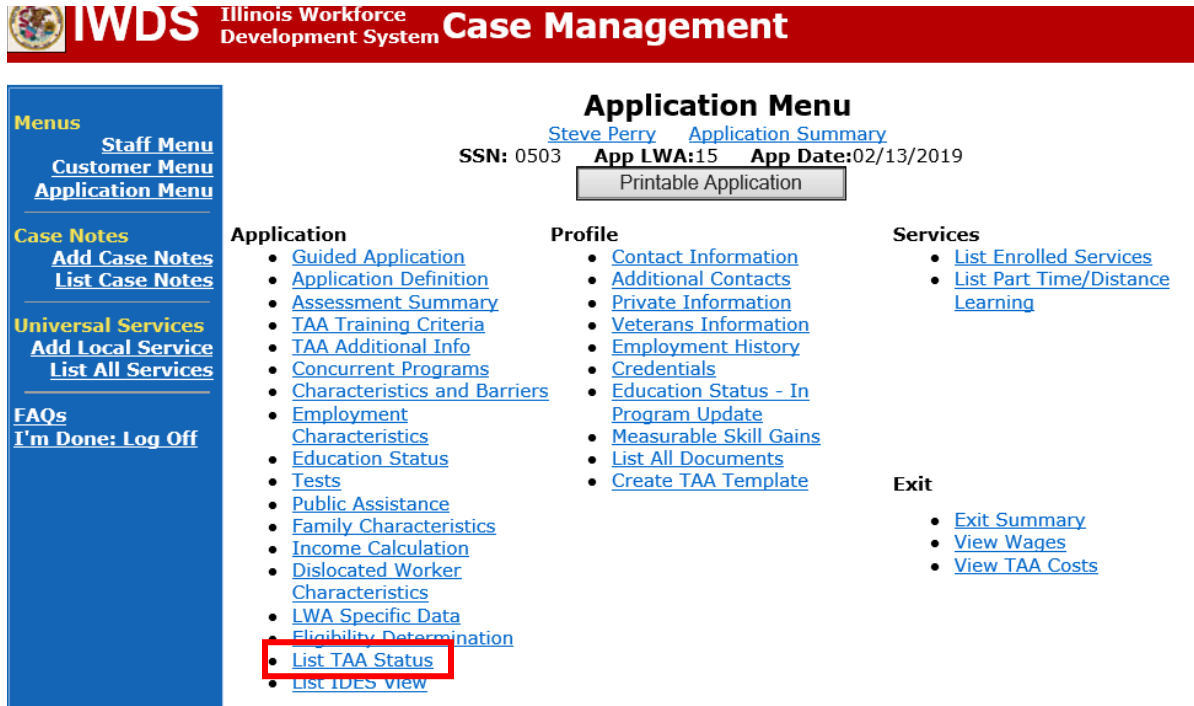
If you have any questions, please call me at () - Ext.
(Telephone Number)

Printed Name of Career Planner

Signature of Career Planner

Date

Enter a **Potential Suspension Request Status Record** in IWDS.
Click **List TAA Status** on the **Application Menu** on the **TAA Application** for the participant.



The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header, the main content area is titled "Application Menu" and displays user information: "Steve Perry", "Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". A "Printable Application" button is visible. On the left, a blue sidebar contains navigation menus: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), "FAQs", and "I'm Done: Log Off". The main content area is divided into three columns: "Application", "Profile", "Services", and "Exit". The "Application" column lists various options, with "List TAA Status" highlighted by a red box. The "Profile" column lists options like "Contact Information" and "Additional Contacts". The "Services" column lists "List Enrolled Services" and "List Part Time/Distance Learning". The "Exit" column lists "Exit Summary", "View Wages", and "View TAA Costs".

Case Management

Application Menu

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

Menus
Staff Menu
Customer Menu
Application Menu

Case Notes
Add Case Notes
List Case Notes

Universal Services
Add Local Service
List All Services

FAQs
I'm Done: Log Off

Application

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

Profile

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

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click Add TAA Status.



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

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

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

List TAA Status

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

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		Sheila Sloan	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

Select **Potential Suspension Request** for the **Status**.

Enter the **Status Start Date**. The start date is the date of entry (this should also match the date of the **Potential Suspension Letter**).

Select **Refused Suitable Employment** as the **Suspension Request Reason**.

Enter a dated comment in the **Comment Box** explaining the reason for the **Potential Suspension Request**.

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

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Case Notes
[Add Case Notes](#)
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Universal Services
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[I'm Done: Log Off](#)

Status: Potential Suspension Request

Status Start Date:

Status End Date:

Waiver Reason:

Suspension Request Reason: (Open dropdown menu)
Refused Suitable Employment
Enrolled in Training, Failed to Start
In Training, Ceased Participation (dropped below full time, quit)
Failed to meet the qualifying requirements of TRA/TAA
Benchmarks Not Met, No Completion TRA
Non-compliant with TAA training requirements

Comments:

IEP Amount Approved:

Revocation Reason:

TAA Return to work Part Time:

Qualifies Under 45 Day Extension:

Qualifies Under 60 Day Extension:

Qualifies Under Federal Good Cause Provision:

Qualifies Under Equitable Tolling:

Here is the screen after a completed entry of a **Potential Suspension Request**.

IWDS
Illinois Workforce Development System
Case Management

Menus

[Staff Menu](#)

[Customer Menu](#)

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Case Notes

[Add Case Notes](#)

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Universal Services

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Maintain TAA Status

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

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

Status: Potential Suspension Request
Entry Date: 12/15/2021
Status Start Date: 12/15/2021
Status End Date:

Suspension Request Reason: Benchmarks Not Met, No Completion TRA

Comments:

Created By: Sheila Sloan **Date Created:** 12/15/2021
Last Updated By: Sheila Sloan **Date Last Updated:** 12/15/2021

Approval Type	Approver	Approved/Denied Date	Approval Status
Original			Pending Approval

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

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

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

Trade Application 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.

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Click on Trade Case Management – TAA.

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

Services

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

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

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Click **Add Additional Episode**.

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[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 case note detailing the circumstance of the **Potential Suspension Request** and the date the **Potential Suspension Letter** was sent to the participant.

Click **Save and Return**.

The screenshot displays the IWDS Case Management interface. At the top, a red banner contains the IWDS logo and the text "Illinois Workforce Development System Case Management". On the left, a blue sidebar menu lists various options: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), "FAQs", and "I'm Done: Log Off". The main content area features a yellow "Informational Message" box stating that a Case Note must be completed when adding an Additional Episode to a Same Day Service. Below this is the "Add Case Note" form for staff member Steve Perry, showing details for participant Sheila Sloan. The form includes fields for Contact Date (11/01/2021), Program (TAA/NAFTA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management Services), and a Case Note text area containing "Provided Case Management Service to participant.". A "Save and Return" button is located at the bottom of the form.

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

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 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". There are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

A table titled "Services" shows 3 found results on Page 1 of 1. The table has columns for Start Date, End Date, Service Provided, Status, and Created By. The first row shows a "Trade Case Management - TAA" service with a start date of 10/25/2020 and an end date of 11/01/2021 (highlighted in red), with a status of "Successful Completion" and created by "Sheila Sloan". The second row shows an "Individual Employment Plan - TAA" service with a start date of 02/13/2019, a status of "Open", and created by "Sheila Sloan". The third row shows an "Issued Waiver - TAA" service with a start date of 02/13/2019 and an end date of 04/14/2019, with a status of "Successful Completion" and created by "Sheila Sloan".

Below the table, there are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

WIOA Application: No entry.

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

Trade Application: No entry.

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.

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



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Services

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

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

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

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Click **Add Additional Episode**.



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Edit Required Activity Information

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

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

Created By: Sheila Sloan
 Date Created: 11/01/2021
 Last Updated By: Sheila Sloan
 Last Updated: 11/01/2021
 Title: IDC
 Service Level: Career Services
 Activity: Career Planning (Case Management) **Same Day Service**
 *Grant:
 Provider: *[1537-00 Bradley University](#)
 Start Date: 11/01/2021
 End Date: 11/01/2021
 Current Status: Successful Completion
 Comments:

Complete the following fields:

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

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

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

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

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

Case Note – Enter a case note detailing the circumstance of the **Potential Suspension Request** and the date the **Potential Suspension** Letter was sent to the participant.

Click **Save and Return**.

The screenshot displays the IWDS 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: "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, 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.

If Illinois is the agent state, the career planner must communicate the **Potential Suspension Request** status for the participant to the Liable State.

IDES Notification of Adjudication

Following the career planner's IWDS entries, the Potential TRA Training/Waiver file Maintenance Report is transmitted to IDES overnight.

Career planner's Follow-Up to IDES Adjudication of the Potential Suspension Request

The career planner will review the IBIS Claimant Issue List Screen for the outcome. Ongoing case management must be provided to determine next steps and process an **IEP** modification, if applicable.

If the PSR is affirmed (participant refused suitable employment), the career planner will revoke the Waiver by doing the following:

To Revoke the Waiver, the career planner will do the following:

Update the paper IEP Modification Form #014a. Fill out all necessary fields and mark **Waiver Change** and **Revocation**.

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"/> Revocation	
<input type="checkbox"/> Criteria Change		<input type="checkbox"/> Date Extension	
<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"/> Other: List documentation: _____		<input type="checkbox"/> File Audit	

Complete the **Trade Form 003d Trade Training Revocation Letter (Revocation Letter)** marking the box for **Your waiver has been revoked due to failure to accept suitable employment.**

Send completed letter to the participant.

Waiver of Training Requirement Revocation Letter

_____/_____/_____
(Date)

(Participant Name)

(Address)

(City)

(State)

(Apt. #)

(Zip Code)

Dear: _____
(Participant Name)

Date of Revocation: ____/____/____ (date merit staff approved revocation)

Reason for Revocation:

Your waiver has been revoked at your request.

Your waiver has been revoked on the date of its expiration.

Your waiver has been revoked due to enrollment in a Trade approved training program.

Your waiver has been revoked due to failure to make contact for your 30-day review as noted on Form #003b.

Your waiver has been revoked due to failure to accept suitable employment.

Your waiver has been revoked due to failure to enroll in a training program that became feasible and appropriate.

If you disagree with this determination, you may complete and submit a request for reconsideration/appeal. A letter will suffice if you do not have an agency form. Your request must be filed with the Illinois Department of Employment Security ("IDES") within thirty (30) calendar days after the date at the top of this letter. If the last day for filing your request is a day that IDES is closed, the request may be filed on the next day that IDES is open. Please file the request by mail at: IDES P.O. Box 19509 Springfield, IL 62794 or fax to: 217-557-4913. Any request submitted by mail must bear a postmark date within the applicable time limit for filing.

If you have any questions, please call me at (____) ____-____ Ext. ____
(Telephone Number)

(Career Planner Signature)

(Career Planner Printed Name)

By signing below, I acknowledge receipt of this Trade Training Revocation Letter.

On the state merit staff approved **Waiver**, under the **Waiver Revocation Section**:
 Enter the date the **Waiver** was revoked.
 Enter **failed to accept suitable employment** as the reason.
 Mark the appropriate box for notice provided to participant (**Revocation Letter**).
 Add signature of career planner and date.

Waiver Revocation	
27. Date the Waiver was Revoked: <input type="text"/> / <input type="text"/> / <input type="text"/>	Reason for revocation: <input type="text"/>
Written notice of revocation provided to participant: Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>	
Date: <input type="text"/> / <input type="text"/> / <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/>
Career Planner Signature: <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/>

Process an **IEP Modification**.

Update the **Potential Suspension Status Record** with a dated comment in the **Comment Box** detailing the outcome of the IDES adjudication.

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

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Click on **View** for the **Potential Suspension Request Status Record**.

IWDS
Illinois Workforce Development System
Case Management

List TAA Status

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		Sheila Sloan	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

Menus

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Universal Services

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FAQs

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

Enter the **Status End Date** (date of IDES outcome).
 Enter a dated comment in the **Comment Box** describing the IDES outcome.
 Click **Save**.

IWDS
Illinois Workforce
Development System
Case Management

Menu

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AQs

[All Done: Log Off](#)

Maintain TAA Status

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

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

Status: Potential Suspension Request
Entry Date: 12/15/2021
Status Start Date: 12/15/2021
Status End Date: 12/30/2021

Suspension Request Reason: Benchmarks Not Met - No Completion TRA

Comments: 12/30/2021 - Comment describing outcome from IDES.
Participant failed to meet two benchmarks.


Created By: Sheila Sloan **Date Created:** 12/15/2021
Last Updated By: Sheila Sloan **Date Last Updated:** 12/15/2021

Approval Type	Approver	Approved/Denied Date	Approval Status
Original			Pending Approval

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

Update the IEP Status Record.

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

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

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List TAA Status

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

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
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

Enter a dated comment in the **Comment Box** describing the reason (failure to accept suitable employment) for the revocation of the waiver.

Click **Save**. This will set the record to pending approval status.

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Maintain TAA Status

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

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

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

Changes to Comments or IEP Amount Approved require DCEO Approval

Comments:

11/1/2021 - Revoking waiver due to enrollment in training.
 2/13/19 - Establishing IEP for customer Steve

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

Enter the **Waiver Revoked Status Record** in IWDS.

Click **Add TAA Status**.

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

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List TAA Status

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

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		Sheila Sloan	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

Select **Waiver Revoked** for **Status**.


Enter the **Status Start Date** (must match the date of revocation on the **Revocation Letter**)

Enter the **Status End Date** (same as **Status Start Date**)

Enter a dated, detailed comment in the **Comment Box**.

Select the **Other** as the **Revocation Reason**.

Click **Save**. This will set the record to pending approval.

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Maintain TAA Status

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

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

Status:

Status Start Date:

Status End Date:

Waiver Reason:

Suspension Request Reason:

Ceased Participation Reason:

Comments:

IEP Amount Approved:

Revocation Reason:

TAA Return to work Part Time:

Qualifies Under 45 Day Extension:

Qualifies Under 60 Day Extension:

Qualifies Under Federal Good Cause Provision:

Qualifies Under Equitable Tolling:

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 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.

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). 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 on Trade Case Management – TAA.

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

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

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

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

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Click **Add Additional Episode**.

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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 case note detailing the reason for the waiver revocation and the date the **Revocation Letter** was sent to the participant.

Click **Save and Return**.

The screenshot displays the IWDS Case Management interface. At the top, a red banner contains the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left, a blue sidebar menu lists various options: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), 'Universal Services' (Add Local Service, List All Services), 'FAQs', and 'I'm Done: Log Off'. The main content area features a yellow 'Informational Message' box stating that a Case Note must be completed when adding an Additional Episode to a Same Day Service. Below this is the 'Add Case Note' form for staff member Steve Perry. The form includes fields for Staff Name (Sheila Sloan), Contact Date (11/01/2021), Program (TAA/NAFTA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management Services), and a Case Note text area containing 'Provided Case Management Service to participant.'. A 'Save and Return' button is located at the bottom of the form.

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

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 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". There are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

On the left side, there is a blue sidebar menu with the following options: "Menu", "Staff Menu", "Customer Menu", "Application Menu", "Case Notes", "Add Case Notes", "List Case Notes", "Universal Services", "Add Local Service", "List All Services", "AQs", and "Form Done: Log Off".

The main content area shows a table of services with the following data:

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

Below the table, there are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

WIOA Application: No entry.

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

Trade Application: No entry.

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

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

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

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



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Services

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

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

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

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Click **Add Additional Episode**.



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Edit Required Activity Information

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

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

Created By: Sheila Sloan
 Date Created: 11/01/2021
 Last Updated By: Sheila Sloan
 Last Updated: 11/01/2021
 Title: IDC
 Service Level: Career Services
 Activity: Career Planning (Case Management) **Same Day Service**
 *Grant:
 Provider: *[1537-00 Bradley University](#)
 Start Date: 11/01/2021
 End Date: 11/01/2021
 Current Status: Successful Completion
 Comments:

Complete the following fields:

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

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

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

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

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

Case Note – Enter a case note detailing the reason for the waiver revocation and the date the **Revocation Letter** was sent 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 an Additional Episode to 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 (WIOA), Note Category (Case Note Supporting Same Day Service), Confidential status (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.

Upload the **Waiver, IEP Modification Form, the Revocation Letter** and supporting documentation to IWDS.

To upload documents in IWDS, click on **List All Documents** under the **Profile** section on the **Application Menu** on the **TAA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu on the left with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. The menu is organized into three columns: "Application" (with 15 items), "Profile" (with 7 items, where "List All Documents" is highlighted with a red box), and "Services" (with 2 items). An "Exit" section at the bottom right contains 3 items.

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

Application

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

Profile

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


Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click **Add Document**.

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

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List All Documents

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

	Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
<input type="button" value="Remove"/>	Z1	Application Menu	Form #014 DCEO/Trade Trade Individual Employment Plan	Tue May 25 13:25:10 CDT 2021		

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

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

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

IWDS Illinois Workforce Development System **Case Management**

Upload Document

Path: Browse...

Type:

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

Send an email request to state merit staff for approval by forwarding the last state merit staff approval email and use the following format:

Email Subject Line: IEP Modification Request for Waiver Revocation – “Participant First Name Initial and Last Name” – LWIA XX

Body of Email:

Can we have an IEP modification approval for a Waiver Revocation for:

Participant Name:

Revocation Date:

Justification for waiver revocation:

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.

NOTE: When the signed **Potential Suspension Letter** is returned by the participant, a **Case Note** must be entered with the date the letter was received.

IDES Adjudication Outcome.

If the PSR is denied (participant did not refuse suitable employment), the career planner will do the following:

Update the **Potential Suspension Status Record** with a dated comment in the **Comment Box** detailing the outcome of the IDES adjudication and enter a **Status End Date** (date of IDES determination).

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

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503 App LWA:15 App Date:02/13/2019", and a "Printable Application" button. The menu is organized into three columns: "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 Exit Summary, View Wages, and View TAA Costs. The "List TAA Status" link in the Application column is highlighted with a red box.

Click on **View** for the **Potential Suspension Request Status Record**.

IWDS
Illinois Workforce Development System
Case Management

List TAA Status

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		Sheila Sloan	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

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Enter the **Status End Date** (date of IDES outcome).
 Enter a dated comment in the **Comment Box** describing the IDES outcome.
 Click **Save**.

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Maintain TAA Status

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

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

Status: Potential Suspension Request
Entry Date: 12/15/2021
Status Start Date: 12/15/2021
Status End Date: 12/30/2021

Suspension Request Reason: Benchmarks Not Met - No Completion TRA

Comments: 12/30/2021 - Comment describing outcome from IDES.
Participant failed to meet two benchmarks.

Created By: Sheila Sloan **Date Created:** 12/15/2021
Last Updated By: Sheila Sloan **Date Last Updated:** 12/15/2021

Approval Type	Approver	Approved/Denied Date	Approval Status
Original			Pending Approval

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

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

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

Trade Application 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.

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). The "List Enrolled Services" link is highlighted with a red box. An "Exit" section contains links for Exit Summary, View Wages, and View TAA Costs.

Click on Trade Case Management – TAA.

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

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

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

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[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](#)

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 case note detailing the outcome of the IDES adjudication and other actions taken as a result of the outcome.

Click **Save and Return**.

The screenshot displays the IWDS Case Management interface. At the top, a red banner contains the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left, a blue sidebar menu lists various options: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), 'Universal Services' (Add Local Service, List All Services), 'FAQs', and 'I'm Done: Log Off'. The main content area features a yellow 'Informational Message' box stating that a Case Note must be completed when adding an Additional Episode to a Same Day Service. Below this is the 'Add Case Note' form for staff member Steve Perry. The form includes fields for Staff Name (Sheila Sloan), Contact Date (11/01/2021), Program (TAA/NAFTA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management Services), and a Case Note text area containing 'Provided Case Management Service to participant.'. A 'Save and Return' button is located at the bottom of the form.

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

IWDS Illinois Workforce Development System **Case Management**

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

Add Enrolled Service Printable Services Return

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

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Add Enrolled Service Printable Services Return

WIOA Application: No entry.

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

Trade Application: No entry.

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

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

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

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



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

Services

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

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

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

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Click **Add Additional Episode**.



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

Edit Required Activity Information

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

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

Created By: Sheila Sloan
 Date Created: 11/01/2021
 Last Updated By: Sheila Sloan
 Last Updated: 11/01/2021
 Title: IDC
 Service Level: Career Services
 Activity: Career Planning (Case Management) **Same Day Service**
 *Grant:
 Provider: *1537-00 Bradley University
 Start Date: 11/01/2021
 End Date: 11/01/2021
 Current Status: Successful Completion
 Comments:

Complete the following fields:

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

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

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

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

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

Case Note – Enter a case note detailing the outcome of the IDES adjudication and other actions taken as a result of the outcome.

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: '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 the message is the 'Add Case Note' form. The form includes the following fields: 'Staff Name' (Steve Perry, Application Summary, 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.

If the outcome results in actions that require an **IEP Modification**, follow the instructions provided for **IEP Modifications** for the appropriate type of modification.