

CONTACT MANAGEMENT



LWACS

Local Workforce Area Contact System

Updated: October 2023



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Local Workforce Area Contact System

Contact Management

Dashboard

Upon loading LWACS, you will be presented with your LWIA Dashboard. The Dashboard shows all contacts entered by your LWIA that are pending additional action.

Local Workforce Area Contact System

Welcome, LWACSboard22 LWACSboard22

You are in the Test Environment

Quick Links

- Contacts
View All Contacts
Add Contact
- Reports
View Reports
- List Serv
View Listserv

Dashboard for LWIA 22

Contacts Pending LWIB Action (1)

LWIA	First Name	Last Name	Job Title	Last Updated By	Last Updated Date	Contact Type	Action
22	Chris	Tester	Executive Vice President General Manager		8/23/2023, 2:16:23 PM	LWIB Member	

Results: 1 to 1 of 1

Limit: 10

Page 1 of 1

Contacts Rejected By State Reviewer (1)

LWIA	First Name	Last Name	Job Title	Last Updated By	Last Updated Date	Contact Type	Action
22	John	Doe	CEO		7/11/2023, 10:32:21 AM	LWIB Member	

Results: 1 to 1 of 1

Limit: 10

Page 1 of 1

In the header, a number will display next to the Home icon informing you of the number of contacts that are pending actions. Contacts shown on the Dashboard have two states:

- Pending LWIB** – contact requires action to be taken by the LWIB Staff member. All contacts entered by Personal Data Entry users will proceed to the Pending LWIB state once it has been saved. These contacts must be reviewed by the Board Staff user to submit to the State.
- Rejected by State Reviewer** – contact was rejected by the State. Click the Verify icon to see any comments stating why the contact was rejected. Click the Edit icon to make any necessary changes and re-submit to the State.

Contact Search

The Contact search screen allows you to quickly search for all contacts that have been associated with your LWIA along with various information such as basic contact information, types, status, and last updated date. Additional contacts can be edited by clicking the **Edit** icon on the right sides and New Contacts can be added using the **Add New Contact** button. The current view (including any filters) can be exported to an excel sheet by clicking the **Export** button.

Contacts

Filters

Name:

Organization / Location:

City:

County:

LWIA:

Role:

Contact Type:

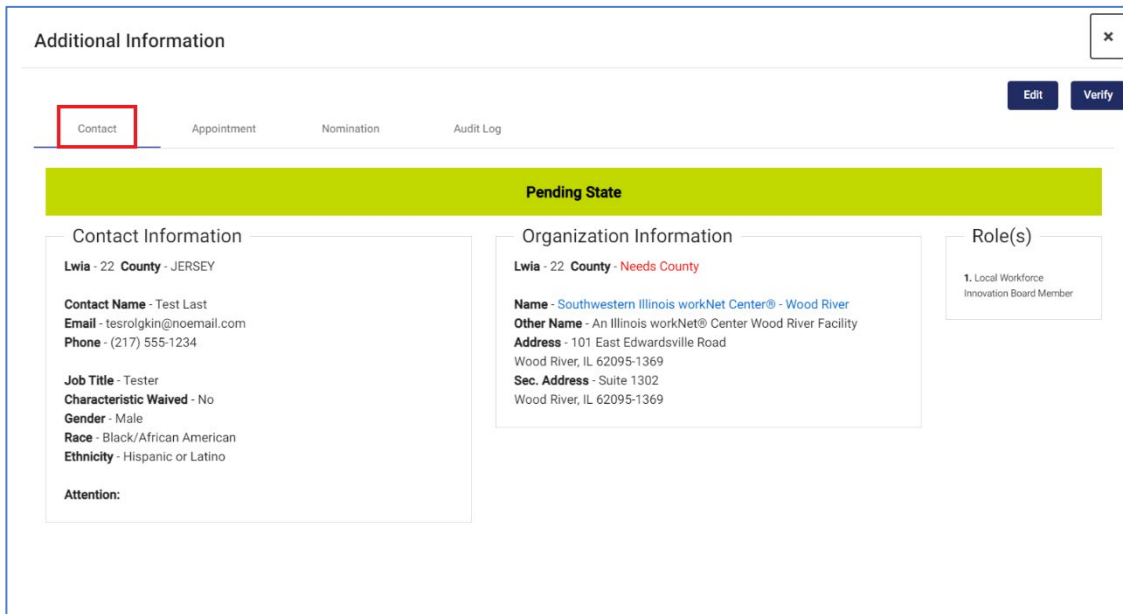
Status:

LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Organization	Last Updated By	Last Updated Date	Contact Type	Current Status	Action
1	NameTest	TestName	skajdhfjasdf	asdfkajhd@asdj (123) 123-1231		Hydraforce Inc, 500 Barclay Boulevard, Lincolnshire, IL	mwaldron	6/20/2023	LWIB Member	Active	

Contact Information Preview

Clicking on a contact's name will open the preview Modal. The modal allows you to quickly view all information entered for the contact, along with highlighting any required information that is currently missing from the record (missing information is displayed in Red text). The modal is divided into 4 sections:

1. **Contact** – Shows the contact's Personal Information, Organization Information, and associated Roles.



Additional Information [Close]

Contact Appointment Nomination Audit Log [Edit] [Verify]

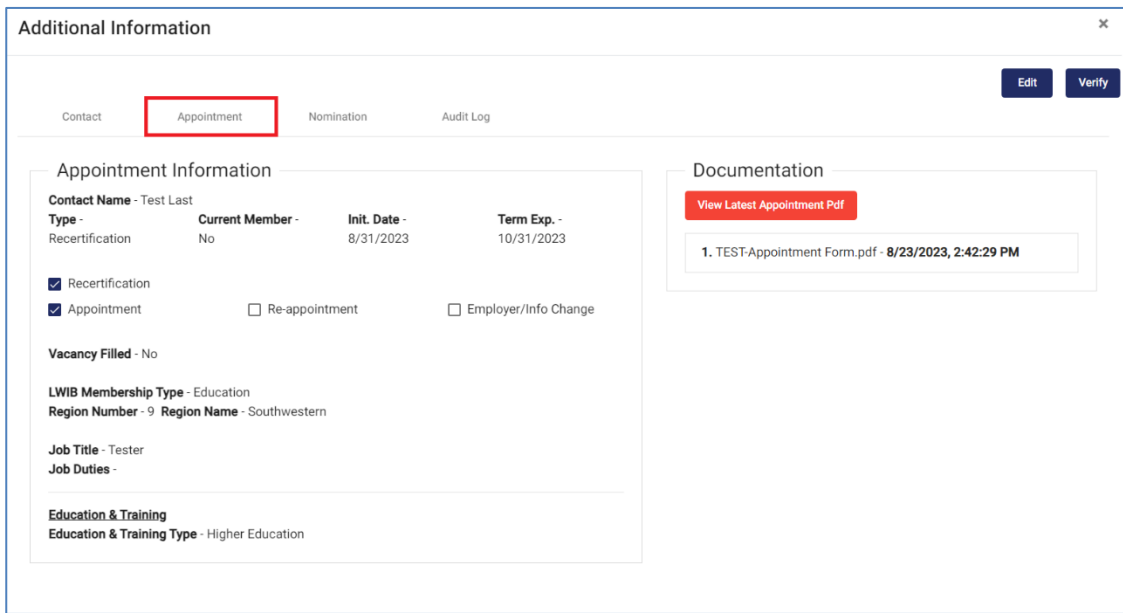
Pending State

Contact Information
 Lwia - 22 County - JERSEY
 Contact Name - Test Last
 Email - tesrolgkin@noemail.com
 Phone - (217) 555-1234
 Job Title - Tester
 Characteristic Waived - No
 Gender - Male
 Race - Black/African American
 Ethnicity - Hispanic or Latino
 Attention:

Organization Information
 Lwia - 22 County - Needs County
 Name - Southwestern Illinois workNet Center@ - Wood River
 Other Name - An Illinois workNet® Center Wood River Facility
 Address - 101 East Edwardsville Road
 Wood River, IL 62095-1369
 Sec. Address - Suite 1302
 Wood River, IL 62095-1369

Role(s)
 1. Local Workforce Innovation Board Member

2. **Appointment (LWIB Members Only)** – Shows the contact's Appointment Information, Appointment Type, Term Dates, Representation Information, and any uploaded Appointment Forms.



Additional Information [Close]

Contact Appointment Nomination Audit Log [Edit] [Verify]

Appointment Information
 Contact Name - Test Last

Type	Current Member	Init. Date	Term Exp.
Recertification	No	8/31/2023	10/31/2023

 Recertification
 Appointment Re-appointment Employer/Info Change
 Vacancy Filled - No
 LWIB Membership Type - Education
 Region Number - 9 Region Name - Southwestern
 Job Title - Tester
 Job Duties -
 Education & Training
 Education & Training Type - Higher Education

Documentation
[View Latest Appointment Pdf](#)
 1. TEST-Appointment Form.pdf - 8/23/2023, 2:42:29 PM



Local Workforce Area Contact System

Contact Management

- Nomination (LWIB Members Only – if applicable) –** Displays the Nominating contact and Organization, and any uploaded Nomination Forms

Additional Information ✕

Edit Verify

Contact
Appointment
Nomination
Audit Log

Nomination Information

Contact Name - Test Last

Nomination Entity - The Nomination Factory
Nominator Contact Title - Prime Nominator
Nominator - Bill Nominator
Nominator Contact Phone - (217) 555-8745

Documentation

View Nomination Pdf

1. - TEST - Nomination Form.pdf - 8/23/2023, 2:42:06 PM -

- Audit Log –** As contacts are entered and edited in the system, and audit log is generated. The log displays all information that has been entered for the contact, along with tracking any changes done to the contact post saving. Information displayed includes:
 - Date – Date of action
 - Time – Time of Action
 - Action – Type of change made.
 - Changes – List of all information that has been entered or modified.
 - Action By – User who made the change.

All changes all are recorded to ensure date integrity and allow for past information to be preserve if there is ever a need to restore previous information to the contact.

Additional Information ✕

Edit Verify

Contact
Appointment
Nomination
Audit Log

Date	Action	Change(s)	Action By
8/23/2023, 2:42:29 PM	Modified Documents	TEST-Appointment Form.pdf was Added on the Appointment Form	LWACSboard22
8/23/2023, 2:42:06 PM	Added Nomination	Nomination Form was Added	LWACSboard22
8/23/2023, 2:42:06 PM	Modified Documents	TEST - Nomination Form.pdf was Added on the Nomination Form	LWACSboard22
8/23/2023, 2:40:57 PM	Modified Appointment	Education/Training Type 1 changed from 'null' to 'Higher Education'. Nomination Form Included changed from 'False' to 'True'. Single Entity Type changed from 'Workforce' to 'Education & Training'. Workforce Type 1 changed from 'CBO' to 'null'.	LWACSboard22
8/23/2023, 2:35:12 PM	Added Appointment	Appointment Form was Added	LWACSboard22
8/23/2023, 2:34:49 PM	Modified Contact	Ethnicity changed from 'null' to 'Hispanic or Latino'. Gender changed from 'null' to 'Male'. Characteristic Waived changed from 'True' to 'False'. Job Title changed from 'sdolfjkhnsn' to 'Tester'. Last Name changed from 'last' to 'Last'. Contact's Organization changed from 'Jerseyville Economic Development Council' to 'Southwestern Illinois workNet Center® - Wood River'. Race changed from 'null' to 'Black/African American'.	LWACSboard22
8/23/2023, 2:34:49 PM	Modified Roles	Local Workforce Innovation Board Member was Added Local Workforce Innovation Board Chair was Deleted	LWACSboard22

Adding a New Contact

Before adding a new contact, users should first search to see if the person is already in the database.

Filters

Name <input type="text"/>	Organization / Location <input type="text"/>
City <input type="text"/>	County <input type="text"/>
LWIA <input type="text"/>	Role <input type="text"/>
Contact Type <input type="text"/>	Status <input type="text"/>

Personal Information

1. On the Contacts screen, select **Add New Contact**
2. Select all Roles that apply to Contact Type and click **Next**.

Roles

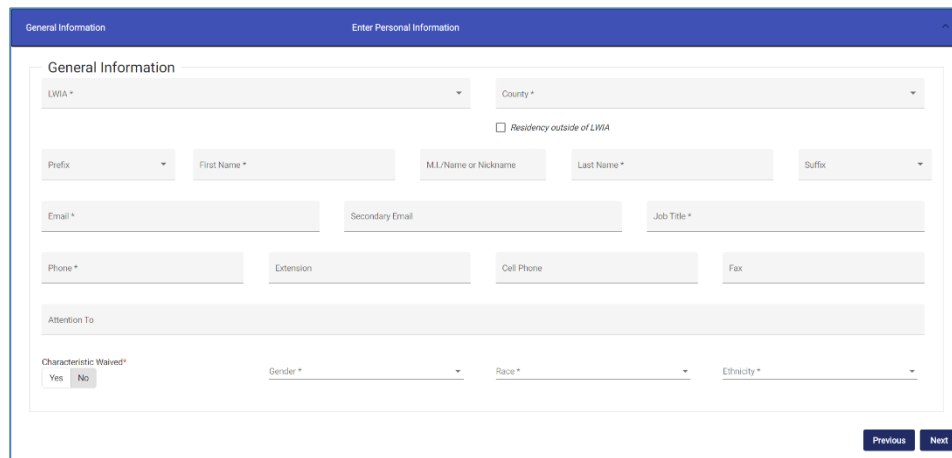
Check all that apply

<input type="checkbox"/> Local Workforce Innovation Board Chair	<input type="checkbox"/> Local Workforce Innovation Board Member	
<input type="checkbox"/> Chief Elected Official - Primary	<input type="checkbox"/> Chief Elected Official - Primary cc	<input type="checkbox"/> Chief Elected Official - Other
<input type="checkbox"/> Local Workforce Innovation Board Chair cc	<input type="checkbox"/> Local Workforce Innovation Board Staff	<input type="checkbox"/> Local Workforce Innovation Board Staff cc
<input type="checkbox"/> 1B Director	<input type="checkbox"/> Equal Opportunity Officers	<input type="checkbox"/> Grant Recipient
<input type="checkbox"/> 1B Director cc	<input type="checkbox"/> One-Stop Operator	<input type="checkbox"/> Grant Recipient cc
<input type="checkbox"/> Performance Manager	<input type="checkbox"/> One-Stop Operator cc	<input type="checkbox"/> Grant Quarterly Reporting
<input type="checkbox"/> Performance Manager cc		<input type="checkbox"/> Fiscal
<input type="checkbox"/> OET Staff	<input type="checkbox"/> OET Staff - Rapid Response	<input type="checkbox"/> Fiscal cc
<input type="checkbox"/> OET Staff - Regional Manager		<input type="checkbox"/> Trade Adjustment Assistance Contacts
<input type="checkbox"/> Additional Roles (State Approvers Only)	<input type="checkbox"/> WIOA State Agency Partners	
<input type="checkbox"/> Other Interested Persons		

Take note of the Roles below:

- a. Local Workforce Innovation Board Member – Requires an Appointment Form and possibly Nomination Form. Displayed on the LWIA Matrix
- b. Local Workforce Innovation Board Chair – Automatically selects Board Member. Displayed on the LWIA Matrix
- c. Local Workforce Innovation Board Chair cc - Displayed on the LWIA Matrix
- d. Chief Elected Official – Primary - Displayed on the LWIA Matrix
- e. Chief Elected Official – Primary cc - Displayed on the LWIA Matrix
- f. Local Workforce Innovation Board Staff - Displayed on the LWIA Matrix
- g. Local Workforce Innovation Board Staff cc - Displayed on the LWIA Matrix

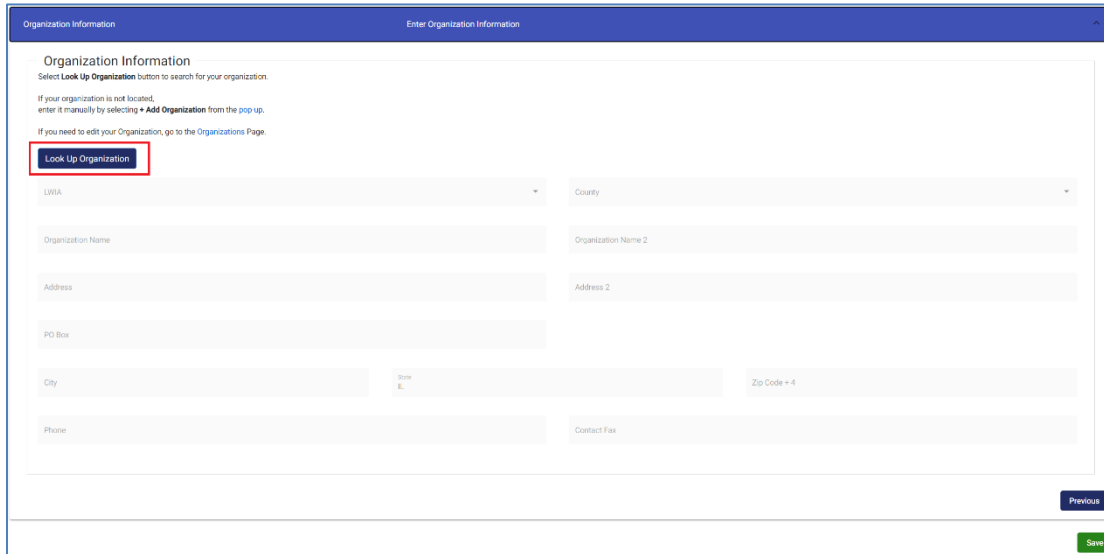
- h. 1B Director info - *Displayed on the LWIA Matrix*
- i. 1B Director cc info - *Displayed on the LWIA Matrix*
- j. OET Staff - Regional Manager – *Does not require an Org. Displayed on the LWIA Matrix*
- k. OET Staff - Rapid Response - *Does not require an Org. Displayed on the LWIA Matrix*



3. Enter the contact's Personal Information (**Red** items are required)
 - a. **LWIA**
 - b. **County** (Check Residency outside of LWIA if contact lives outside of the LWIA/State to see full county list)
 - c. Prefix
 - d. **First Name**
 - e. Middle Initial
 - f. **Last Name**
 - g. Suffix
 - h. **Email**
 - i. **Job Title**
 - j. **Phone**
 - k. Extension
 - l. Cell Phone
 - m. Fax

If the Contact is a Board Member, addition fields are available:

- n. Attention to
 - o. **Characteristics Waived** - if No
 - i. **Gender**
 - ii. **Race**
 - iii. **Ethnicity**
4. Click **Next** to display the Organization Information
 - a. OET roles do not require Org information.



Organization Information

Enter Organization Information

Organization Information
Select **Look Up Organization** button to search for your organization.
If your organization is not located, enter it manually by selecting **Add Organization** from the pop up.
If you need to edit your Organization, go to the [Organizations Page](#).

Look Up Organization

LWIA County

Organization Name Organization Name 2

Address Address 2

PO Box

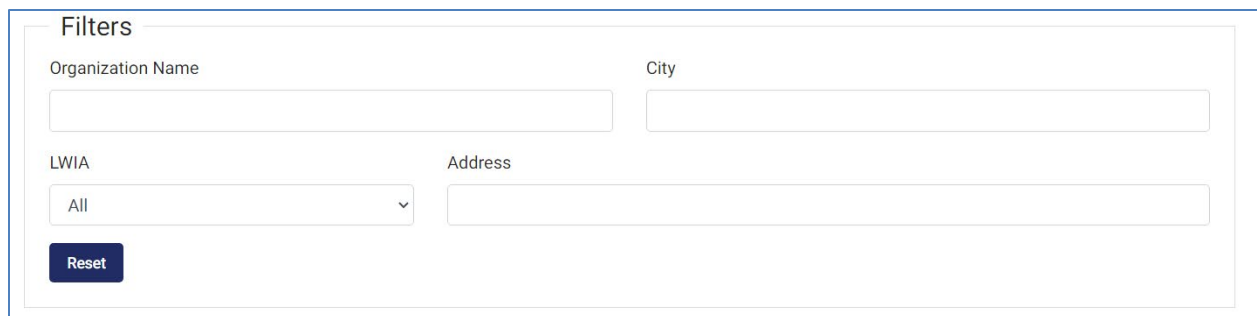
City State Zip Code + 4

Phone Contact Fax

Previous

Save

- Under the Organization Information, select the **Look Up Organization** button to search for the Organization the contact is associated with.



Filters

Organization Name City

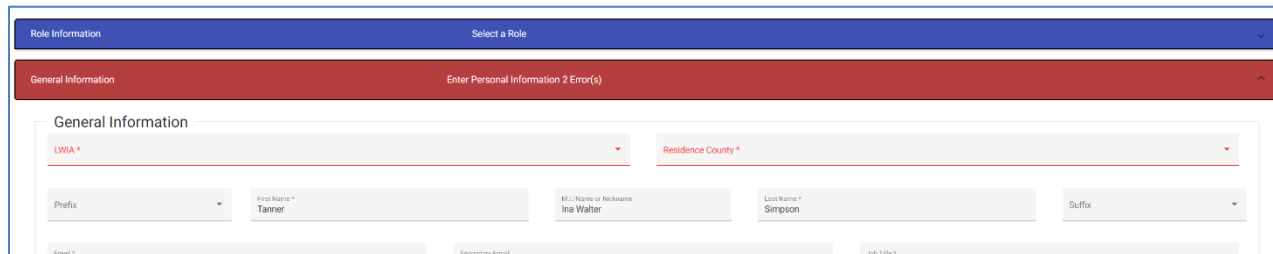
LWIA Address

All

Reset

- Search for existing Organizations in the modal that displays. You can search Orgs by:
 - Organization Name
 - City
 - LWIA
 - Address
- If you find the location, click the **Select** button for the designated Organization Name. It will pre-populate the Organization Information. If you cannot find the location already in the database, click the **Add Organization** at the bottom of the search and manually enter the following Organization information:
 - LWIA**
 - County**
 - Organization Name**
 - Address**
 - PO Box (if Mailing Address is different than the locations address)
 - City**
 - State**
 - Zip Code**
 - Phone
 - Contact Fax

- Once all information has been entered, select the **Save** button.

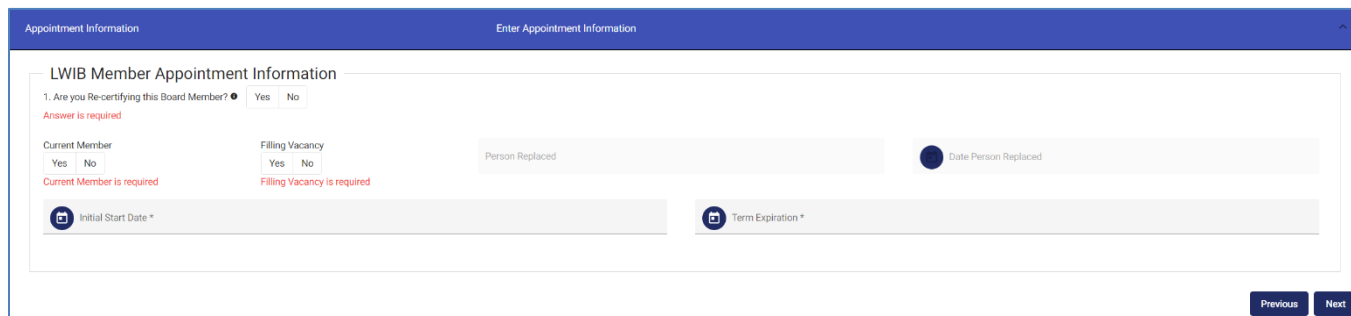


The screenshot shows a web form with two main sections: 'Role Information' and 'General Information'. The 'Role Information' section is highlighted in blue and contains a dropdown menu labeled 'Select a Role'. The 'General Information' section is highlighted in red and contains a message: 'Enter Personal Information 2 Error(s)'. Below this message, the 'General Information' section is expanded to show several input fields: 'LWIA *', 'Residence County *', 'Prefix', 'First Name *' (with the value 'Tanner'), 'M.I. / Name or Nickname' (with the value 'Ina Walter'), 'Last Name *' (with the value 'Simpson'), and 'Suffix'. At the bottom of the form, there are fields for 'Email *', 'Secondary Email', and 'Job Title *'.

- If there is any missing information, the section will be highlighted in red. Click on the section and add the missing information. If there are no errors an alert modal will display.
 - If the contact is a Non-Board Member: Select **Save** if you want to confirm the submission of the contact. Select **Close** to review the contact information or to cancel. Non-Board Members are automatically made Active upon submission.
 - If the contact is a Board Member: Select Next to proceed to the Appointment Form. Select **Close** to review the contact information or to cancel.

Appointment Information

The top header now shows Add/Edit Appointment Form highlighted. Click **View Entered Information** to review the Contact Information from the previous screen. If there are any issues, click the **Personal Information** header or **Back** button to edit contact information.

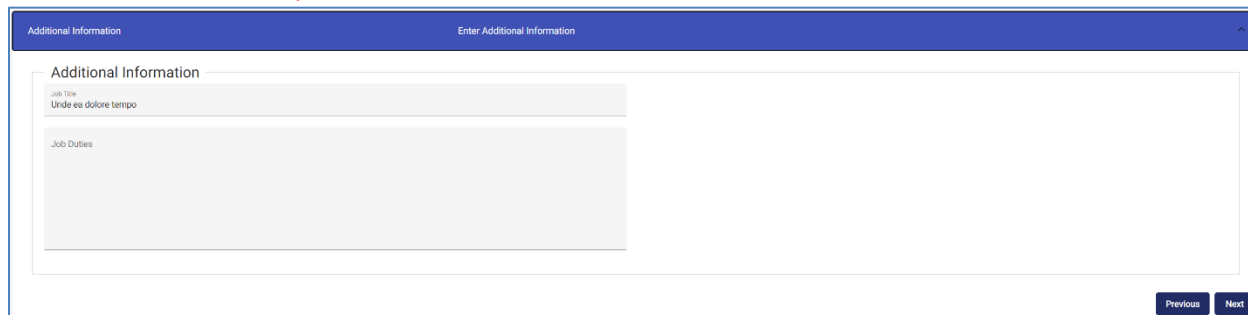


The screenshot shows the 'Appointment Information' form. The title bar reads 'Appointment Information' and 'Enter Appointment Information'. The main content area is titled 'LWIB Member Appointment Information'. It contains several sections:

- '1. Are you Re-certifying this Board Member?' with radio buttons for 'Yes' and 'No'. A red error message 'Answer is required' is shown below.
- 'Current Member' with radio buttons for 'Yes' and 'No'. A red error message 'Current Member is required' is shown below.
- 'Filling Vacancy' with radio buttons for 'Yes' and 'No'. A red error message 'Filling Vacancy is required' is shown below.
- 'Person Replaced' text input field.
- 'Date Person Replaced' date input field.
- 'Initial Start Date *' date input field with a calendar icon.
- 'Term Expiration *' date input field with a calendar icon.

 At the bottom right, there are 'Previous' and 'Next' buttons.

1. In the Appointment Information section complete the following:
 - a. Are you Re-certifying this Board Member (Yes/No)
 - i. If **NO**: select the **Reason for Submission** (check all that apply)
 - ii. If **YES**: (2) Is this a New Appointment? If YES, proceed to item b.
 If NO: (3a) Is this a Reappointment?
 (3b) Are you making an Employer or Contact Information Change?
 - b. **Current Member** (Yes/No) - Indicates if the contact is currently serving on the Board.
 - c. **Filling Vacancy** (Yes/No) If YES, enter the **Person Replace** and the **Date Replaced**.
 - d. **Initial Start Date**
 - e. **Term Expiration Date**

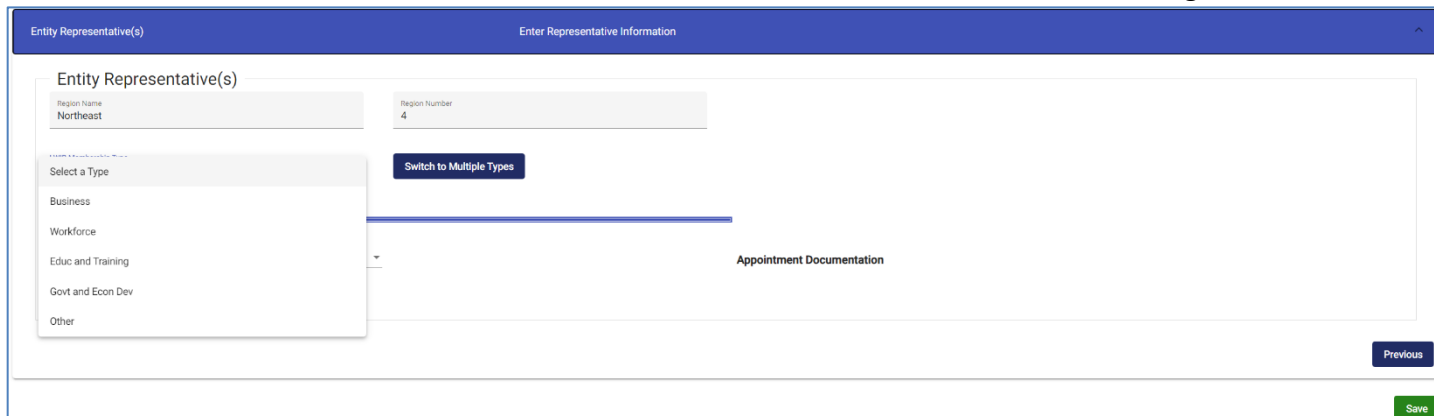


The screenshot shows the 'Additional Information' form. The title bar reads 'Additional Information' and 'Enter Additional Information'. The main content area is titled 'Additional Information' and contains two text input fields:

- 'Job Title' with placeholder text 'Unde ea dolore tempo'.
- 'Job Duties'.

 At the bottom right, there are 'Previous' and 'Next' buttons.

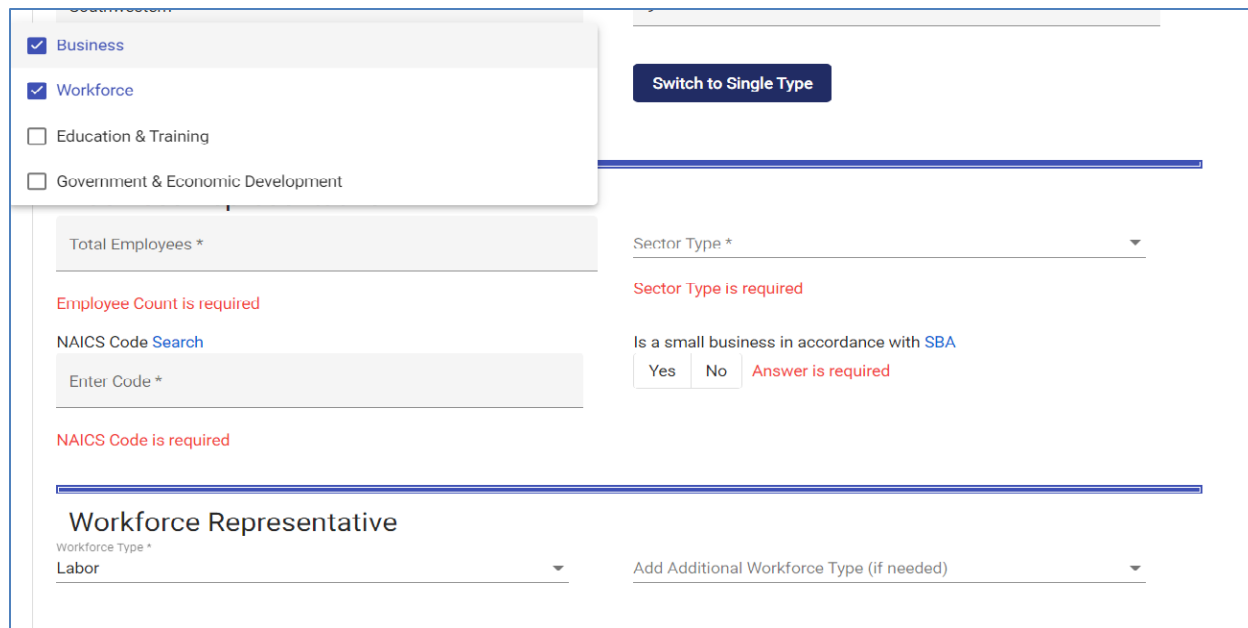
2. Click **Next** to Proceed to the Additional Information section to enter the **Job Duties** for the contact.
3. Click **Next** to Proceed to the Representative Information section.



4. Under Entity Representative(s), complete the following:
 - a. Region Name (auto populated) – Select the Personal Information header to edit.
 - b. Region Number (auto populated) - Select the Personal Information header to edit.
 - c. Select the **LWIB Membership Type**. Based on the Membership Type selected, the following fields will need to be entered.
 - i. Business
 1. **Total Employees**
 2. **Sector** (dropdown)
 3. **NAICS Code** (6-digit NAICS)
 4. **Is the business a Small Business according to the SBA?** (Yes/No)
 - ii. Workforce
 1. CBO*
 2. Labor
 3. Labor Apprenticeship
 4. Youth*

*CBO and Youth requires entering Services Provided
 - iii. Education and Training
 1. Adult Education and Literacy
 2. CBO*
 3. Higher Education
 4. Local Education

*CBO requires entering Services Provided
 - iv. Government and Economic/Community Development
 1. Economic and Community Development
 2. Wagner-Peyser Act (Employment Service)
 3. Vocation Rehabilitation
 4. Transportation, Housing, and Public Assistance
 5. Philanthropic Organization
 - v. Other
 1. No additional information required.



The screenshot shows a web form for contact management. On the left, a dropdown menu is open, showing four membership types: **Business** (checked), **Workforce** (checked), **Education & Training** (unchecked), and **Government & Economic Development** (unchecked). A blue button labeled "Switch to Single Type" is visible. Below the menu, there are several input fields and validation messages:

- Total Employees ***: A text input field with a red error message below it: "Employee Count is required".
- NAICS Code Search**: A text input field with a "Search" button and a red error message below it: "NAICS Code is required".
- Sector Type ***: A dropdown menu with a red error message below it: "Sector Type is required".
- Is a small business in accordance with SBA**: A form with "Yes" and "No" radio buttons and a red error message: "Answer is required".
- Workforce Representative**: A dropdown menu currently set to "Labor" with a red error message below it: "Workforce Type is required".
- Add Additional Workforce Type (if needed)**: A dropdown menu.

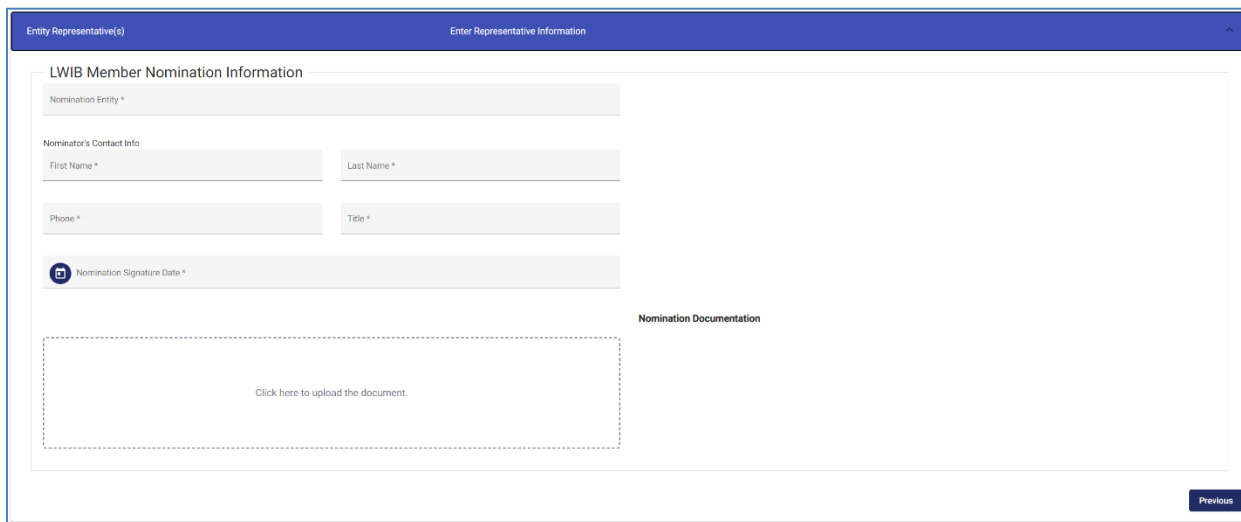
- d. To add multiple Membership Types to a single contact, select the **Switch to Multiple Type** button, select all that apply, and complete the information for each type.
5. Once all the information has been completed, click **Save**.
 - a. If the LWIB Membership type is Government and Economic/Community Development or Other, no Nomination Form is required. On the alert modal, select **Save** to submit the Appointment Form. Select **Close** to review the appointment form information or to cancel.
 - b. If the type is Business, Workforce (Labor), or Education and Training (Adult Education or Higher Education), select **Save** to submit the Appointment Form and proceed to the Nomination Form. Select **Close** to review the Appointment Form information or to cancel.

Nomination Information

The top header now shows Nomination Form highlighted. Click **View Entered Information** to review the Contact Information or Appointment Information from the previous screens. If there are any issues, click the respective header or **Back** button to make edits. Nomination Forms are only required during the initial Appointment to the Board.

The follow Appointment Representative Types require a Nomination Form:

- Business
- Workforce (Labor)
- Education and Training (Adult Education or Higher Education)



The screenshot shows a web form titled "Enter Representative Information" with a sub-section "LWIB Member Nomination Information". The form contains the following fields:

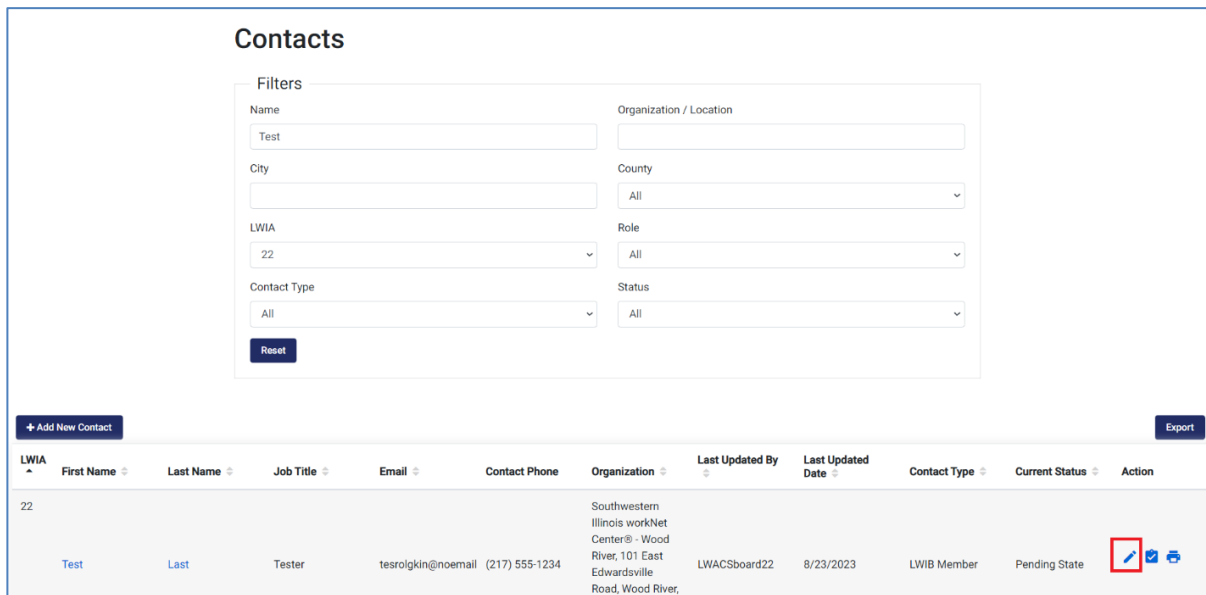
- Nomination Entity *
- Nominator's Contact Info:
 - First Name *
 - Last Name *
 - Phone *
 - Title *
- Nomination Signature Date *
- Nomination Documentation: A dashed box with the text "Click here to upload the document."

A "Previous" button is located at the bottom right of the form.

1. On the LWIB Member Nominee Information section, enter the following information:
2. **Nomination Entity**
3. **Nominator's Contact Info**
 - a. **First Name**
 - b. **Last Name**
 - c. **Phone**
 - d. **Title**
 - e. **Nomination Signature Date**
4. Upload the completed and signed Nomination Form by clicking on the file area and selecting the document from your computer.
5. Once all nomination information has been completed, select **Save** to submit the Appointment Form. Select **Close** to review the Nomination Form information or to cancel.

Edit Existing Contacts

On the Contacts screen, information for entered contacts can be edited and updated in the system. Depending on your role, some information may not be available to update.



Contacts

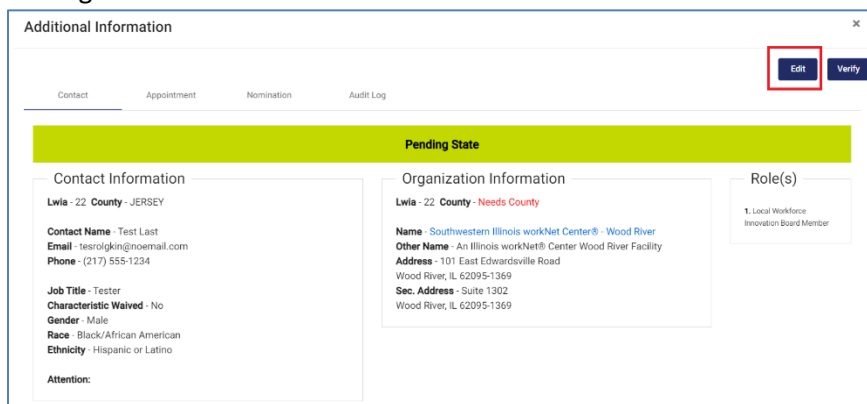
Filters

Name: Test
Organization / Location: [Empty]
City: [Empty]
County: All
LWIA: 22
Role: All
Contact Type: All
Status: All
Reset

+ Add New Contact Export

LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Organization	Last Updated By	Last Updated Date	Contact Type	Current Status	Action
22	Test	Last	Tester	tesroigkin@noemail	(217) 555-1234	Southwestern Illinois workNet Center® - Wood River, 101 East Edwardsville Road, Wood River,	LWACSboard22	8/23/2023	LWIB Member	Pending State	Edit Verify Print

1. Locate the contact in the list view by using the search/filters.
2. Select the **Edit** button located under the Action column in the row associated with the contact that is being updated.
 - a. You can also **Edit** a contact by clicking on the name in the Contact Search screen and clicking Edit in the Preview Modal.



Additional Information

Contact Appointment Nomination Audit Log

Edit Verify

Pending State

Contact Information

Lwia - 22 County - JERSEY

Contact Name - Test Last
Email - tesroigkin@noemail.com
Phone - (217) 555-1234

Job Title - Tester
Characteristic Waived - No
Gender - Male
Race - Black/African American
Ethnicity - Hispanic or Latino

Attention:

Organization Information

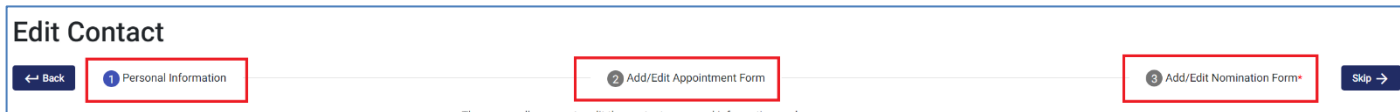
Lwia - 22 County - Needs County

Name - Southwestern Illinois workNet Center® - Wood River
Other Name - An Illinois workNet® Center Wood River Facility
Address - 101 East Edwardsville Road
Wood River, IL 62095-1369
Sec. Address - Suite 1302
Wood River, IL 62095-1369

Role(s)

1. Local Workforce Innovation Board Member

3. On the Edit Contact screen, **select the Header** or use the **Back** and **Skip** buttons to navigate to the section that needs to be updated.



Edit Contact

← Back 1 Personal Information 2 Add/Edit Appointment Form 3 Add/Edit Nomination Form* Skip →

The screen allows you to edit the contact's personal information such as:

4. Make all necessary updates following the steps outlined in [Adding a New Contact](#). Once you have made changes to the respective section, select **Save**. On the confirmation window, select **Next/Save** to submit the updates and move onto the next section (if applicable).
5. Click on **Contacts** in the header to return to the Contacts screen.

Appointment Form

Generating and Printing the Appointment Form

Appointment Forms are system generated from the information entered during the [contact entry](#) process.

Contacts

Filters

Name <input type="text" value="Test"/>	Organization / Location <input type="text"/>
City <input type="text"/>	County <input type="text" value="All"/>
LWIA <input type="text" value="22"/>	Role <input type="text" value="All"/>
Contact Type <input type="text" value="All"/>	Status <input type="text" value="All"/>

[Reset](#)

[+ Add New Contact](#)
[Export](#)

LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Organization	Last Updated By	Last Updated Date	Contact Type	Current Status	Action
22	Test	Last	Tester	tesrolgkin@noemail	(217) 555-1234	Southwestern Illinois workNet Center® - Wood River, 101 East Edwardsville Road, Wood River,	LWACSboard22	8/23/2023	LWIB Member	Pending State	Edit Print

1. Search for the contact and click on the Print button. A modal will display showing the Appointment Form.

Printable Forms

[Edit Contact](#)
[Print](#)

Appointment Form

State of Illinois
Illinois Worknet Innovation Board

APPOINTMENT/REAPPOINTMENT FORM

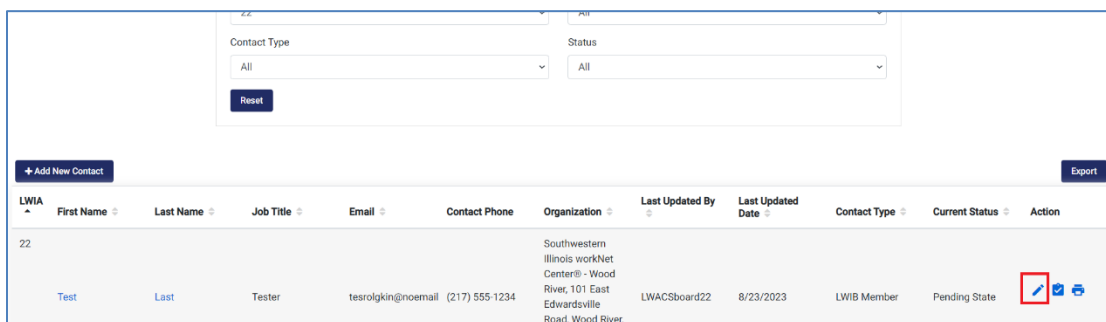
LOCAL WORKFORCE INNOVATION BOARD

1-LWIA#_0_	3-Representing Entity_ Testing 123	
2-Name_ Testing Tester	5-City_ Test City	6-County Representing <input type="checkbox"/> Residence County (if required)
4-Street Address_ Testing Lane		
7-State_ TT	8-Zip_ 61416	12-Reason for Submission (Check all that apply)
9-Phone_ (312) 555-1234 ext. ____	<input type="checkbox"/> Appointment Name of member being replaced: _____ <input checked="" type="checkbox"/> Reappointment <input type="checkbox"/> Recertification <input type="checkbox"/> Employer change/new contact information	
10-Fax_	14-Nominee Characteristics (Optional) <input type="checkbox"/> Waived	
11-Email_ Test.Test@noemail.com	Gender: <input type="checkbox"/> Male <input checked="" type="checkbox"/> Female <input type="checkbox"/> Prefer Not to Answer Race: <input checked="" type="checkbox"/> White <input type="checkbox"/> Black/African American <input type="checkbox"/> Asian <input type="checkbox"/> American Indian/Alaska Native <input type="checkbox"/> Other <input type="checkbox"/> Hawaiian Native/Pacific Islander Ethnicity: <input type="checkbox"/> Hispanic or Latino <input checked="" type="checkbox"/> Non-Hispanic or Latino	
13- Title and/or job duties demonstrating optimum policy making authority (Attach additional pages, if necessary)		
15-Nominee Signature I certify that the above information is accurate and complete. I further acknowledge that my role as a Local Workforce Innovation Board member requires that I publicly disclose any conflict of interest, whether real or apparent, prior to discussion on a matter regarding provision of services by myself or an entity that I represent or that would provide direct financial benefit to myself or a member of my immediate family and shall abstain from voting on such matters. (Conflict of interest is a situation in which a person, such as a public official, an employee, or a professional, has a private or personal interest sufficient to appear to influence the objective exercise of his or her official duties.)		
Signature: _____ Date: ____/____/____		
16-Business Representative <input type="checkbox"/> (NOTE: nomination form required only for initial appointment) <input type="checkbox"/> Is a small business in accordance with: Table of size standards (sba.gov)		

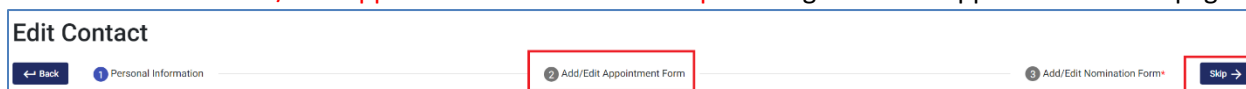
2. Review the Appointment Form. If there is an error, select **Edit Contact** to make any changes.
3. Once the form is confirmed accurate, select **Print**. You will be prompted to save the PDF.
4. Click the X in the top right to close the modal.

Uploading the Signed Appointment Form

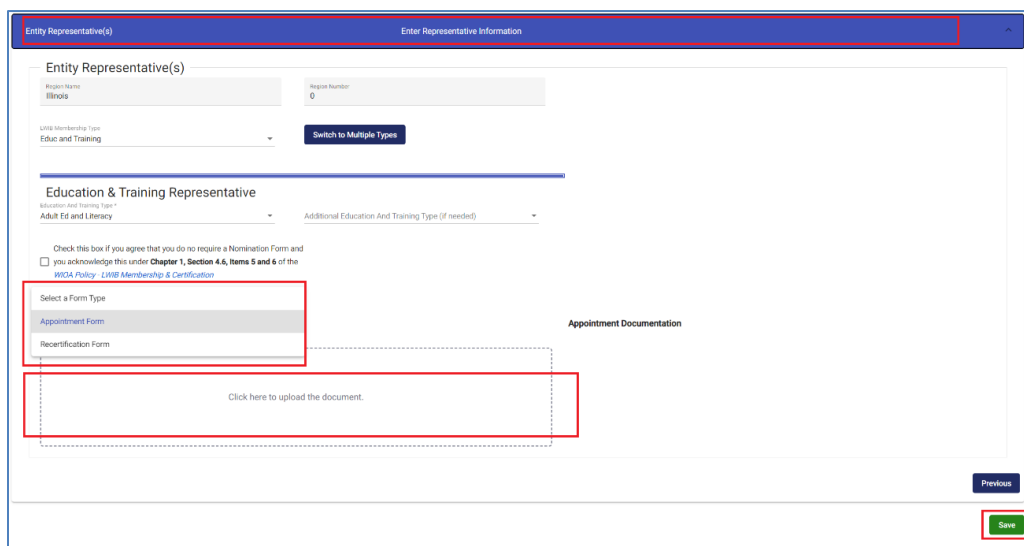
1. Once the Appointment Form has been signed, search for the contact and click on the **Edit** button.



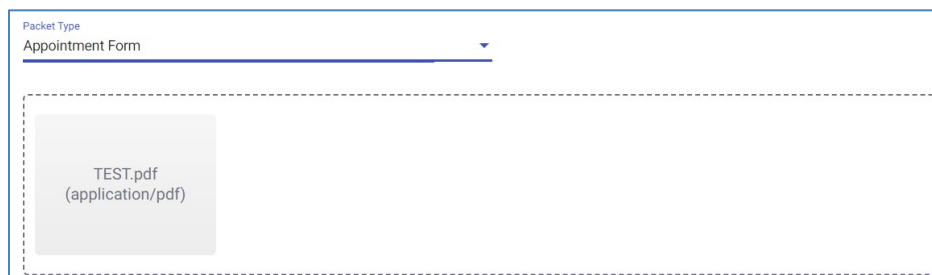
2. Click the **Add/Edit Appointment Form** or click **Skip** to navigate to the Appointment Form page.



3. On the Appointment Form, scroll down and click the **Representative Information** banner.
4. Click on **Packet Type** and select **Appointment Form** (if during an annual update period) or **Recertification Form** (if during a recertification period). An upload section will display.




5. Click the box to select the PDF, or you can drag the PDF to the box to upload the form.



6. Once the file has been added, click **Save**.
7. On the alert confirmation, click **Next** to confirm the upload.
8. Click **Contacts** in the header to return to the Contact Search screen.

Contact Verification

Local Workforce Innovation Board (LWIB) members or State approvers have access to verify LWIB Member contacts.

LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Organization	Last Updated By	Last Updated Date	Contact Type	Current Status	Action
22	Alfred	Borden	CEO	abord11@noemail.com	(618) 555-7548	The Best Bank, 1234 Bankers Way, Edwardsville, IL 62025	LWACSboard22	7/11/2023	LWIB Member	Pending State	

1. Locate the contact in the list view by using the search/filters.
2. Select the **Verify** icon located under the Action column in the row associated with the contact that is being verified.
3. Board Member users and State users have different verification options available:

Board Member Options

Contact
Appointment
Nomination
Verification

Rejected by State

Contact Information

Lwia - 20 County - Needs County

Contact Name - Tonya E Test
Email - DrTonyaTest@noemail.com - or - DrTestTonya@noemail.com
Phone - (212) 213-2114

Job Title - Mayor

Organization Information

Lwia - 20 County - Needs County

Name - Testing site 2
Address - 43 East Testing Street
Springfield, IL 62703
Sec. Address - Suite 3421
Springfield, IL 62703

Role(s)

1. One-Stop Operator

Approve / Reject

Pending LWIB

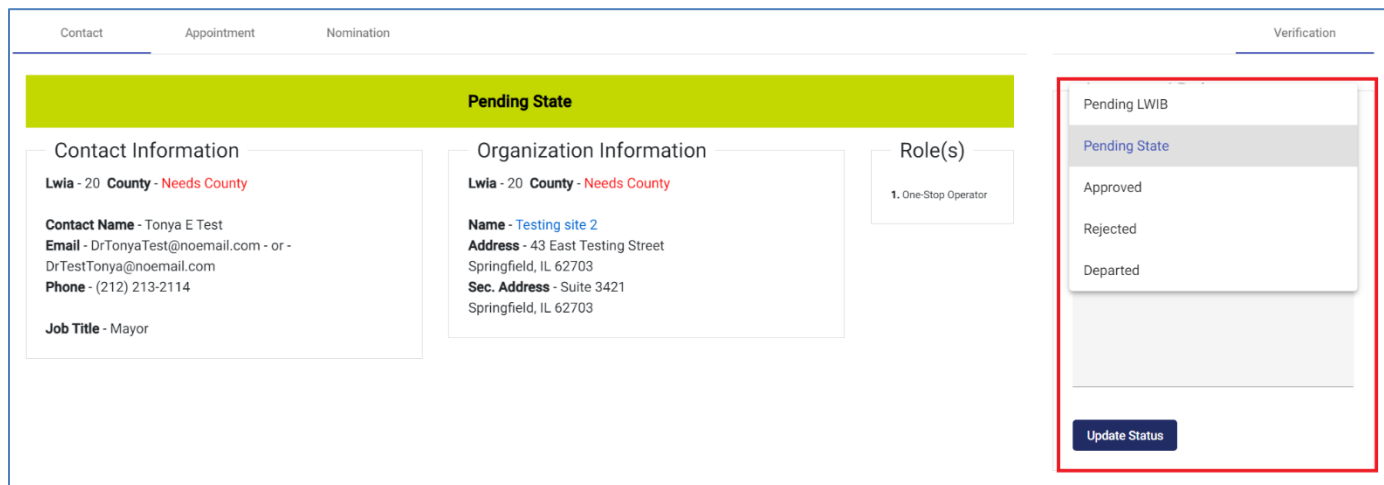
Send to State

Departed

Update Status

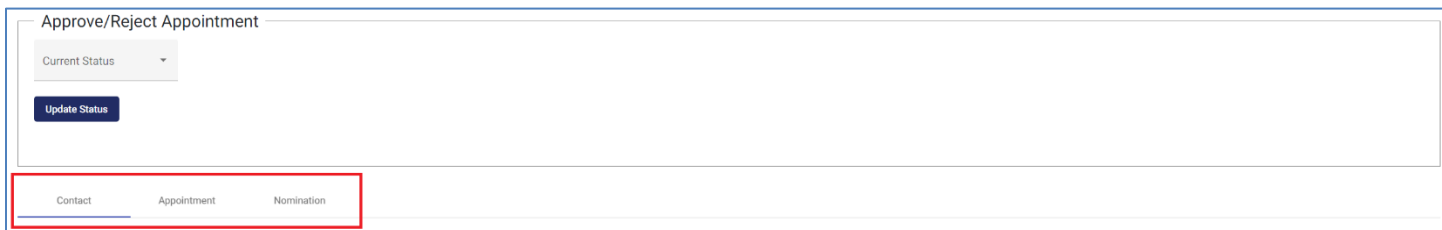
- a. Pending LWIB – Default for new LWIB Member contacts created by a Data Entry users or contacts that have been edited but not yet submitted to the State.
- b. Send to State – Submit LWIB Member to the State for approval post rejection.
- c. Departed – Make an Active LWIB Member contact departed.

State Options



The screenshot displays the 'State Options' interface. At the top, there are tabs for 'Contact', 'Appointment', 'Nomination', and 'Verification'. A green banner indicates the current status is 'Pending State'. Below this, there are three main sections: 'Contact Information', 'Organization Information', and 'Role(s)'. The 'Contact Information' section shows details for 'Lwia - 20 County - Needs County', including contact name, email, phone, and job title. The 'Organization Information' section shows details for 'Lwia - 20 County - Needs County', including name, address, and secondary address. The 'Role(s)' section shows '1, One-Stop Operator'. On the right side, a dropdown menu is open, showing a list of status options: 'Pending LWIB', 'Pending State' (which is highlighted), 'Approved', 'Rejected', and 'Departed'. Below the dropdown is an 'Update Status' button.

- Pending LWIB - Default for new LWIB Member type contacts created by a Data Entry users or contacts that have been edited by a Data Entry user.
- Pending State – Contact has been approved by the Board. Awaiting approval from the State.
- Approved – Contact approved by the State. Status is now Active.
- Rejected – Contact rejected by the State.
- Departed - Make an Active LWIB Member contact departed.



The screenshot shows the 'Approve/Reject Appointment' interface. It features a 'Current Status' dropdown menu and an 'Update Status' button. Below the main form area, there are tabs for 'Contact', 'Appointment', and 'Nomination'.

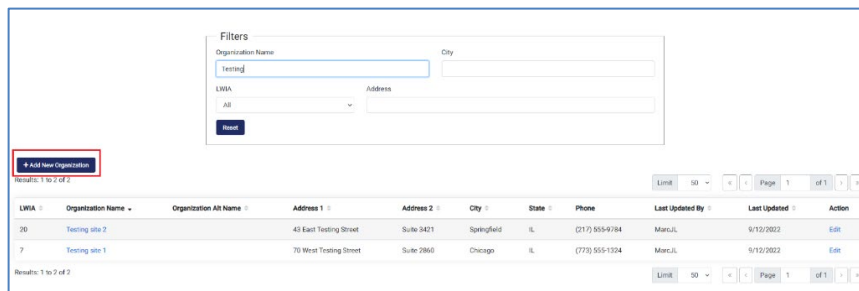
- Contact Information, Appointment Form, and if applicable, Nomination Form information along with any uploaded hardcopies can be viewed by using the screen selector tabs.
- After all information has been verified, select the proper action from the drop down and click **Update Status**.
*If you are making a contact *Departed*, select **Departed** from the dropdown, enter the **Departed Date** in the Date field that displays, and select **Make Departed**.

Organizations

Organization can be created on the fly during the Add New Contact process or created and managed on the Organization screen.

Add New Organization

To add a new Organization via the Organization screen:



Filters

Organization Name: City:

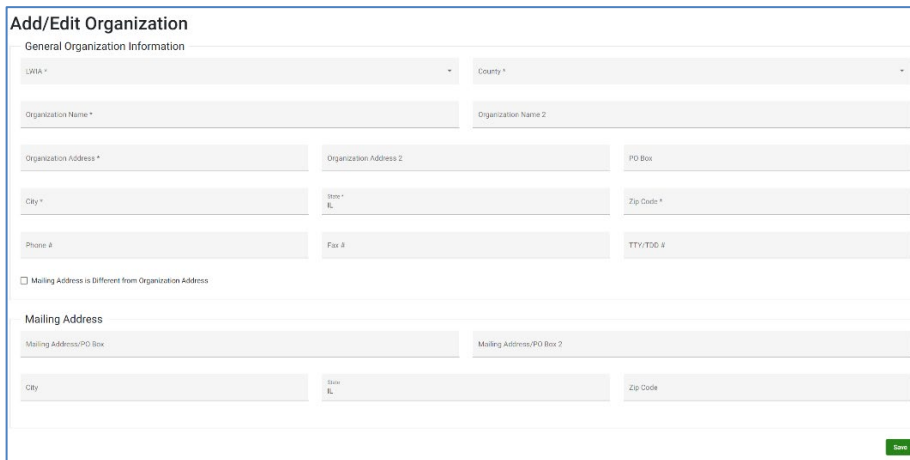
LWIA: Address:

Results: 1 to 2 of 2

LWIA	Organization Name	Organization Alt Name	Address 1	Address 2	City	State	Phone	Last Updated By	Last Updated	Action
20	Testing site 2		43 East Testing Street	Suite 3421	Springfield	IL	(217) 555-4784	Marci.L.	9/13/2022	Edit
7	Testing site 1		70 West Testing Street	Suite 2960	Chicago	IL	(773) 555-1104	Marci.L.	9/13/2022	Edit

Results: 1 to 2 of 2

1. Click the **Add New Organization** button.



Add/Edit Organization

General Organization Information

LWIA * County *

Organization Name * Organization Name 2

Organization Address * Organization Address 2 PO Box

City * State * Zip Code *

Phone # Fax # TTY/TDD #

Mailing Address is Different from Organization Address

Mailing Address

Mailing Address/PO Box Mailing Address/PO Box 2

City State Zip Code

2. Enter the following Organization information:
 - a. **LWIA**
 - b. **County**
 - c. **Organization Name**
 - d. **Address**
 - e. **City**
 - f. **State**
 - g. **Zip Code**
 - h. **Phone**
 - i. **Contact Fax**
3. If the mailing address is different from the Organization Address, click the **checkbox** and enter the mailing information.
 - j. **Address/PO Box**
 - k. **City**
 - l. **State**
 - a. **Zip Code**
4. Once all information has been entered, select the **Save** button.

Edit Organization

To Edit a new Organization via the Organization screen:

1. Locate the Organization in the list view by using the search/filters.
2. Click on the **Edit** icon in the row of the Organization.

Organizations

Filters

Organization Name City

LWIA Address

[+ Add New Organization](#)

LWIA	Organization Name	Organization Alt Name	Address 1	Address 2	City	State	Phone	Last Updated By	Last Updated	Action
22	The Best Bank		1234 Bankers Way		Edwardsville	IL	(618) 555-1234	LWACSboard22	7/11/2023	<input style="border: 1px solid red;" type="button" value="Edit"/>

3. Edit the following Organization information as required:
 - a. **LWIA**
 - b. **County**
 - c. **Organization Name**
 - d. **Address**
 - e. **City**
 - f. **State**
 - g. **Zip Code**
 - h. **Phone**
 - i. **Contact Fax**
4. If the mailing address is different from the Organization Address, click the **checkbox** and enter the mailing information.
 - j. **Address/PO Box**
 - k. **City**
 - l. **State**
 - m. **Zip Code**

Once all information has been entered, select the **Save** button.



Local Workforce Area Contact System

Contact Management

View Organization Contact

All contacts that are associated with an Organization can be viewed on the Organization screen.

LWIA	Organization Name	Organization Alt Name	Address 1	Address 2	City	State	Phone	Last Updated By	Last Updated	Action
22	The Best Bank		1234 Bankers Way		Edwardsville	IL	(618) 555-1234	LWACSboard22	7/11/2023	

1. Locate the Organization in the list view by using the search/filters.
2. Click on the name of the Organization.
3. A modal will display showing all contact currently associated with the Organization.

The Best Bank Contacts

1234 Bankers Way
Edwardsville, IL 62025

[Edit Organization](#)

LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Last Updated Date	Contact Type	Current Status
22	Alfred	Borden	CEO	abord11@noemail.c	(618) 555-7548	7/11/2023	LWIB Member	Pending State
22	John	Doe	CEO	johndoe@noemail.c	(217) 555-1234	7/11/2023	LWIB Member	

Results: 1 to 2 of 2

Limit 50 | Page 1 of 1