

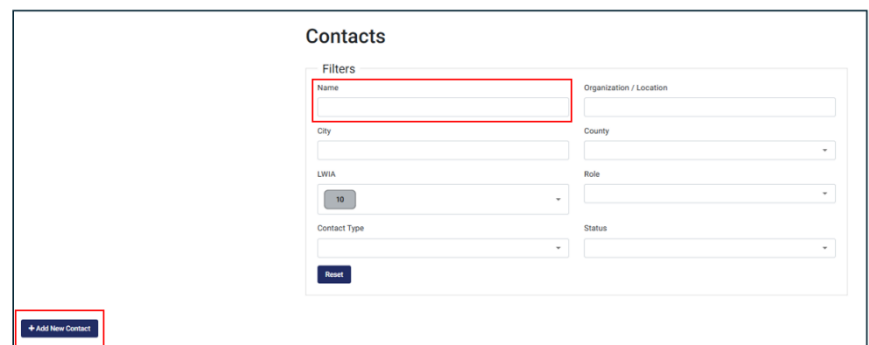
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Add a New Contact

Before adding a new contact, search for the person's name to see if they are already in the database.

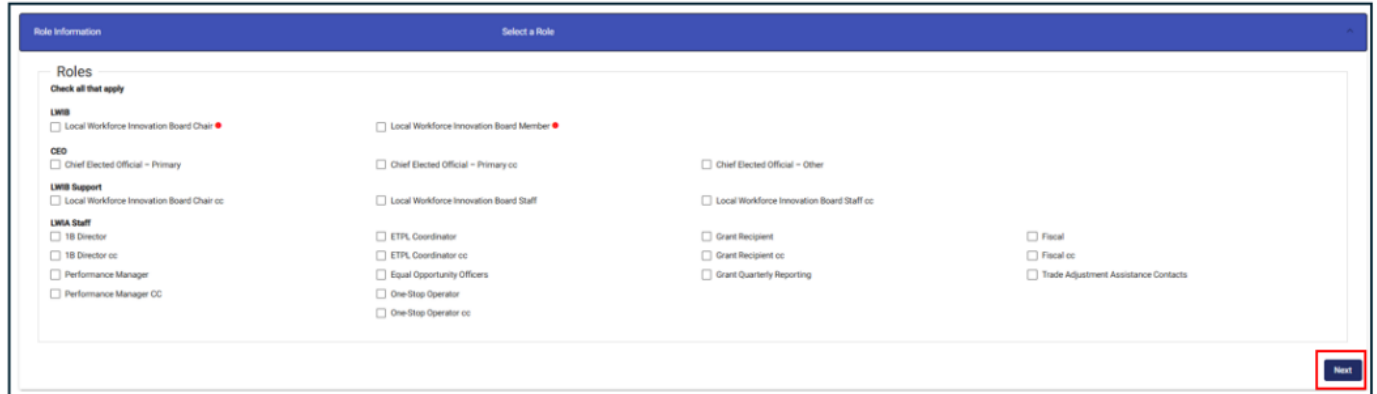
Click **Add New Contact**



The screenshot displays the 'Contacts' management interface. It features a 'Filters' section with input fields for 'Name', 'City', 'LWIA' (with a dropdown menu), 'Contact Type' (with a dropdown menu), 'Organization / Location', 'County' (with a dropdown menu), 'Role' (with a dropdown menu), and 'Status' (with a dropdown menu). A 'Reset' button is located at the bottom of the filters. In the bottom left corner of the interface, the 'Add New Contact' button is highlighted with a red rectangular box.

Role Information – Select a Role

Select all roles that apply to the contact type and click **Next**.



Role Information Select a Role

Roles
Check all that apply

LWIB
☐ Local Workforce Innovation Board Chair ●
☐ Local Workforce Innovation Board Member ●

CEO
☐ Chief Elected Official – Primary
 ☐ Chief Elected Official – Primary cc
 ☐ Chief Elected Official – Other

LWIB Support
☐ Local Workforce Innovation Board Chair cc
 ☐ Local Workforce Innovation Board Staff
 ☐ Local Workforce Innovation Board Staff cc

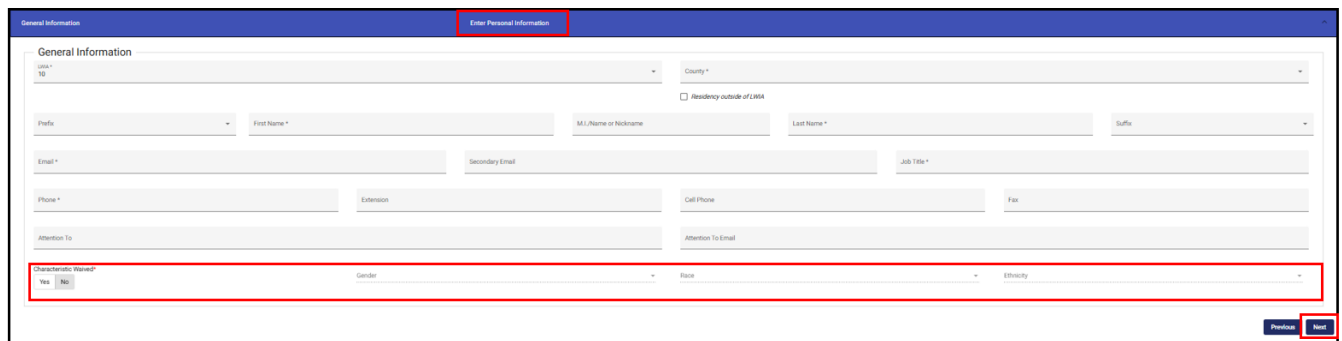
LWIA Staff
☐ 1B Director
 ☐ 1B Director cc
 ☐ Performance Manager
 ☐ Performance Manager CC
 ☐ ETPF, Coordinator
 ☐ ETPF, Coordinator cc
 ☐ Equal Opportunity Officers
 ☐ One-Stop Operator
 ☐ One-Stop Operator cc
 ☐ Grant Recipient
 ☐ Grant Recipient cc
 ☐ Grant Quarterly Reporting
 ☐ Fiscal
 ☐ Fiscal cc
 ☐ Trade Adjustment Assistance Contacts

Next

General Information - Personal Information

Enter the contact's Personal Information and click **Next**.

- If the Contact is a Board Member, additional fields are required:
 - Characteristics Waived - if No
 - Gender
 - Race
 - Ethnicity



General Information Enter Personal Information

General Information

City * County *

☐ Residency outside of LWIA

Prefix * First Name * M.I./Name or Nickname Last Name * Suffix *

Email * Secondary Email Job Title *

Phone * Extension Cell Phone Fax

Attention To Attention To Email

Characteristics Waived? ☐ Yes ☒ No

Gender Race Ethnicity

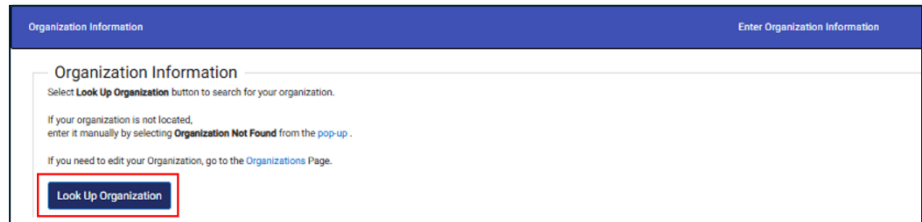
Previous **Next**

Organization Information – Enter Organization Information

Note: OET roles do not require Org information.

Look Up Organization

Under the Organization Information, click **Look Up Organization** to search for the organization the contact is associated with.



Organization Information

Enter Organization Information

Organization Information

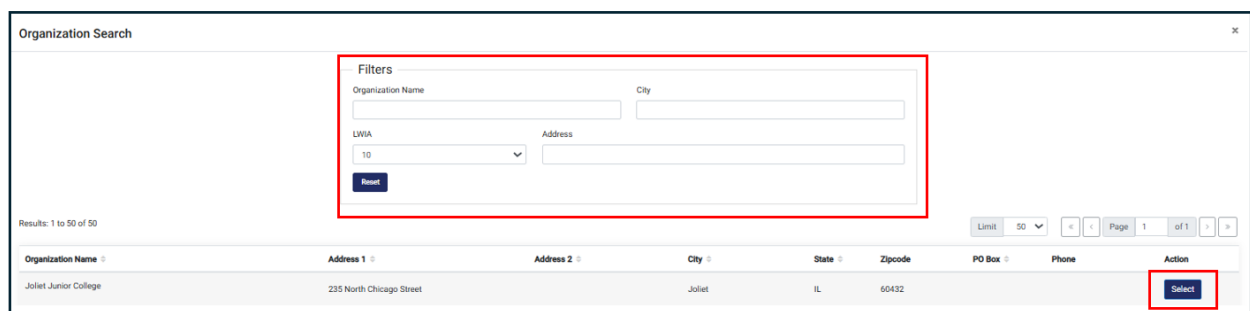
Select **Look Up Organization** button to search for your organization.

If your organization is not located, enter it manually by selecting **Organization Not Found** from the pop-up.

If you need to edit your Organization, go to the [Organizations Page](#).

Look Up Organization

Search for existing Organizations in the modal that displays using the search fields provided.



Organization Search

Filters

Organization Name

City

LWIA

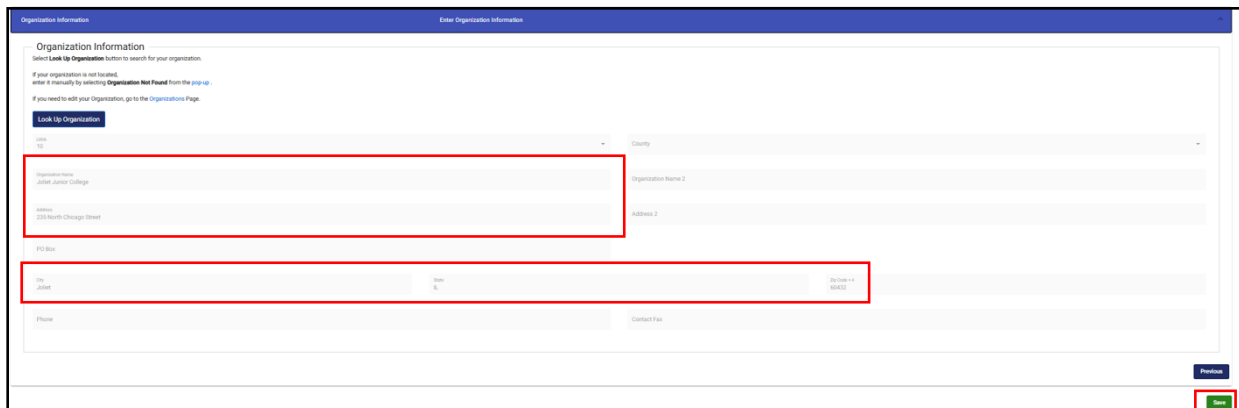
Address

Reset

Results: 1 to 50 of 50

Organization Name	Address 1	Address 2	City	State	Zipcode	PO Box	Phone	Action
Joliet Junior College	235 North Chicago Street		Joliet	IL	60432			Select

When the organization is found in the search, click **Select**. The organization information will pre-populate.



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 **Organization Not Found** from the pop-up.

If you need to edit your Organization, go to the [Organizations Page](#).

Look Up Organization

Look Up Organization

Organization Name

City

Address 1

Address 2

PO Box

City

State

Zipcode

Phone

Contact Fax

Save

Click **Save**.

Add Organization Manually

If the organization cannot be found using the search, click **Organization Not Found** at the bottom of the search to manually enter the information.

Results: 1 to 50 of 50

Organization Not Found

Limit: 50 Page: 1 of 1

Enter the organization information and click **Save**.

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 **Organization Not Found** from the pop-up.

Look Up Organization

LWSA *

County *

Organization Name *

Organization Name 2 *

Address *

Address 2 *

PO Box *

City *

State *

Zip Code + 4 *

Phone *

Contact Fax *

Previous

Save

Missing Information

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.

Role Information

Select a Role

General Information

Enter Personal Information 2 Error(s)

General Information

LWSA *

Residence County *

Prefix *

First Name *

Tanner

Middle Name or Nickname

Ira Walter

Last Name *

Simpson

Suffix *

Email *

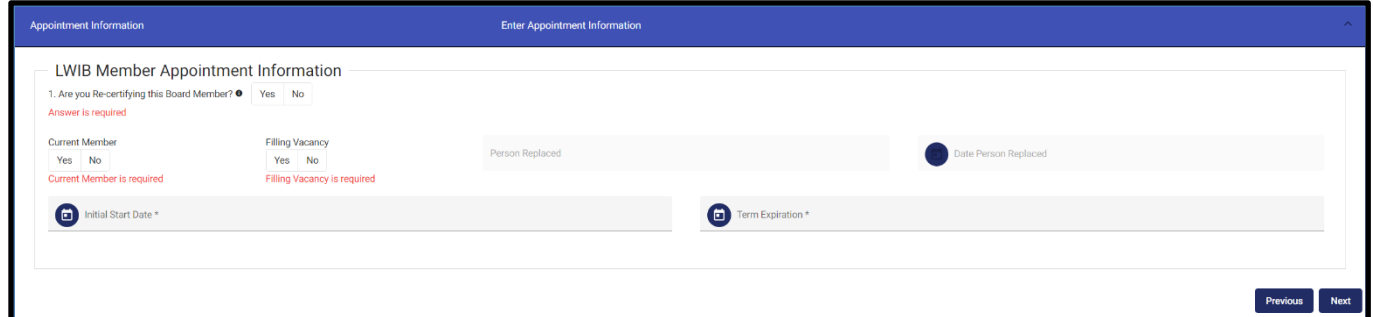
Remember Email

Job Title *

Appointment Form

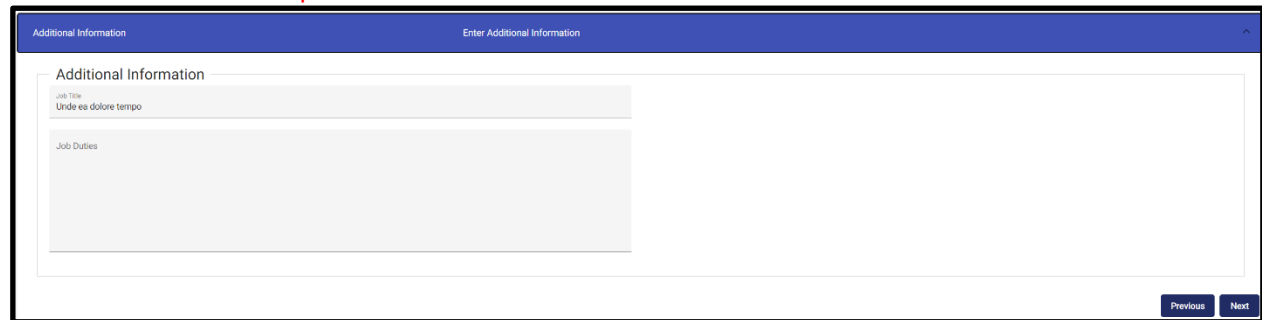
The top header now shows Add/Edit Appointment Form highlighted.

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.



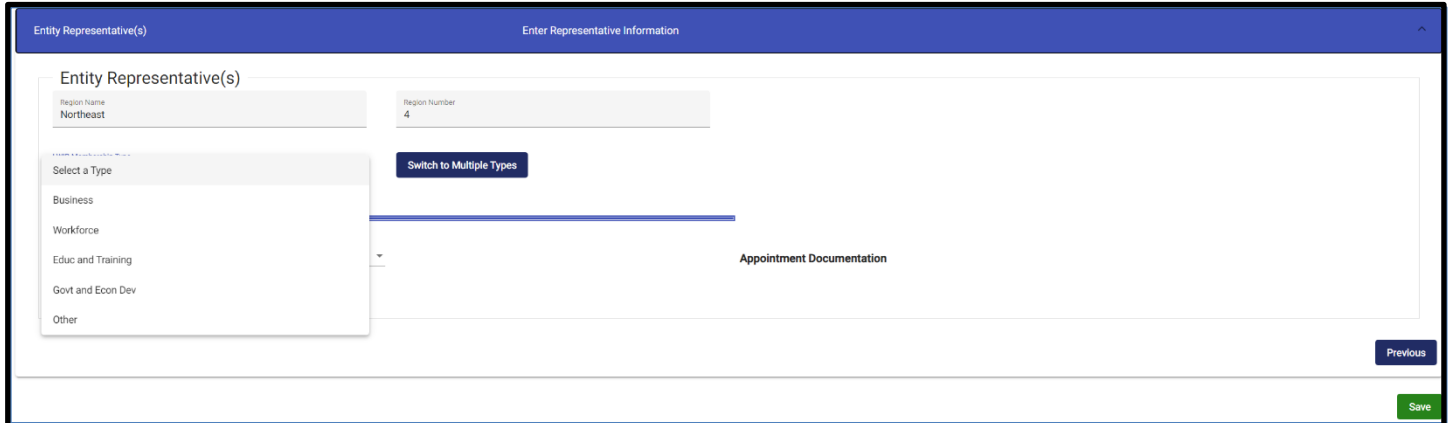
The screenshot shows the 'Appointment Information' form. The header bar is blue with 'Appointment Information' on the left and 'Enter Appointment Information' on the right. The form content area is white. At the top, it says 'LWIB Member Appointment Information'. Below this is a question: '1. Are you Re-certifying this Board Member?' with 'Yes' and 'No' radio buttons. A red message 'Answer is required' is below. Then there are two sections: 'Current Member' with 'Yes' and 'No' radio buttons (a red message 'Current Member is required' is below), and 'Filling Vacancy' with 'Yes' and 'No' radio buttons (a red message 'Filling Vacancy is required' is below). To the right of 'Filling Vacancy' is a text field for 'Person Replaced'. To the right of that is a date field for 'Date Person Replaced'. At the bottom are two date fields: 'Initial Start Date *' and 'Term Expiration *'. At the bottom right 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 header bar is blue with 'Additional Information' on the left and 'Enter Additional Information' on the right. The form content area is white. It has two text areas: 'Job Title' (with placeholder text 'Unde ee dolore tempo') and 'Job Duties'. At the bottom right 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.



The screenshot shows the 'Enter Representative Information' form in the LWACS system. The form has a blue header bar with the title 'Enter Representative Information'. Below the header, there are two input fields: 'Region Name' with the value 'Northeast' and 'Region Number' with the value '4'. To the left of these fields is a dropdown menu labeled 'Select a Type' with options: Business, Workforce, Educ and Training, Govt and Econ Dev, and Other. A 'Switch to Multiple Types' button is located to the right of the dropdown. Below the input fields is a large text area labeled 'Appointment Documentation'. At the bottom right of the form are 'Previous' and 'Save' buttons.

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.

☒ Business
 ☒ Workforce
 ☐ Education & Training
 ☐ Government & Economic Development

Total Employees *

Employee Count is required

NAICS Code [Search](#)

Enter Code *

NAICS Code is required

Sector Type *

Sector Type is required

Is a small business in accordance with [SBA](#)

Answer is required

Workforce Representative

Workforce Type *

Labor

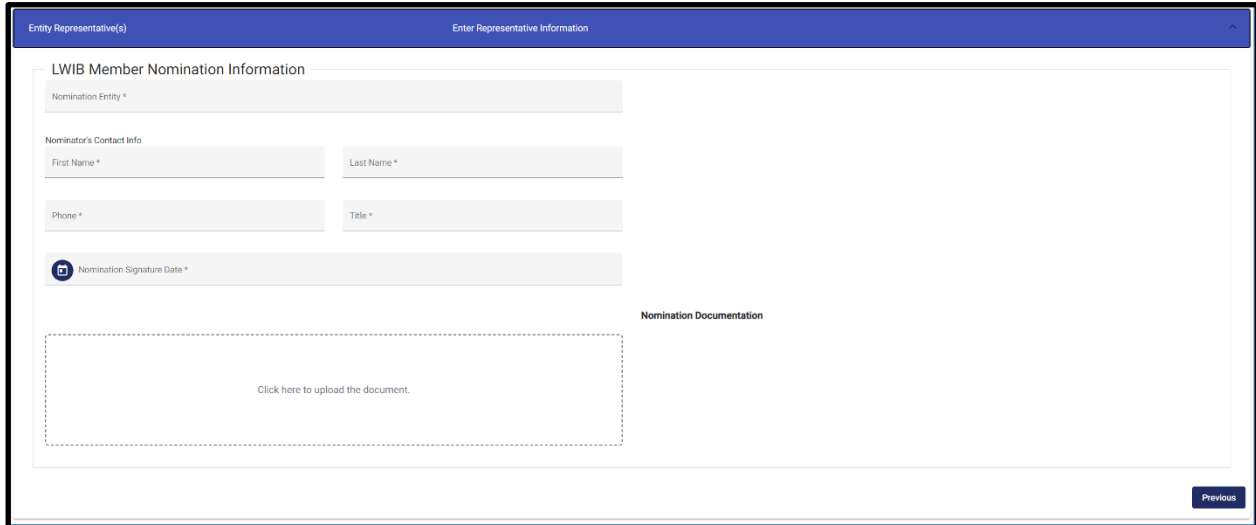
Add Additional Workforce Type (if needed)

Switch to Single Type

- 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.

LWIB Member Nomination Information

The top header now shows the 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.



Entity Representative(s) Enter Representative Information

LWIB Member Nomination Information

Nomination Entity *

Nominator's Contact Info

First Name * Last Name *

Phone * Title *

Nomination Signature Date *

Nomination Documentation




Click here to upload the document.

Previous

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 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.

LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Organization	Last Updated By	Last Updated Date	Contact Type	Current Status	Action
0	Testing	Tester	Director	TestJtest@noemail.cor	(312) 555-1234	Testing 123, Testing Lane, Test City, TT 61416	MarcJL	6/27/2023	LWIB Member	Active	  

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.

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:

3. **Select the Header** or use the **Back** and **Skip** buttons to navigate to the section that needs to be updated.
4. Make all necessary updates and select **Save**. On the confirmation window, select **Save** to submit the updates. Select **Close** to review or to cancel updates.
5. Click on **Contacts** in the header to return to the Contacts screen.

Printing the Appointment Form

Appointment Forms are system-generated from the information entered during the contact entry process. Search for the contact and click on the **Print** button.


LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Organization	Last Updated By	Last Updated Date	Contact Type	Current Status	Action
0	Testing	Tester	Director	TestJtest@noemail.com	(312) 555-1234	Testing 123, Testing Lane, Test City, TT 61416		6/27/2023	LWIB Member	Active	 

A modal will display showing the following at the top:

- Appointment form
- Appointment form instructions
- Nomination form
- Nomination form instructions

Review the Appointment Form. If there is an error, select **Edit Contact** to make changes.


Printable Forms





Edit Contact

Print

Appointment Form


State of Illinois
Illinois Worknet Innovation Board

1-LWIA# 0

APPOINTMENT/REAPPOINTMENT FORM
LOCAL WORKFORCE INNOVATION BOARD

2-Name Testing Tester

3-Representing Entity Testing 123

6-County Representing

☐ Residence County (if required)

4-Street Address
Testing Lane

5-City
Test City

7-State TT

8-Zip 61416

9-Phone (312) 555-1234 ext

10-Fax

11-Email TestJtest@noemail.com

12-Reason for Submission (Check all that apply)
☐ Appointment
☒ Reappointment
☐ Employer change/new contact information

Name of member being replaced:
☐ Recertification

13- Title and/or job duties demonstrating optimum policy making authority (Attach additional pages, if necessary)

14-Nominee Characteristics (Optional)
Gender: ☐ Male ☒ Female ☐ Prefer Not to Answer
Race: ☒ White ☐ Black/African American
☐ Asian ☐ American Indian/Alaska Native
☐ Other ☐ Hawaiian Native/Pacific Islander
Ethnicity: ☐ Hispanic or Latino ☒ Non-Hispanic or Latino

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: _____

Fill out appropriate Entity Representative(s) below

16-Business Representative ☐

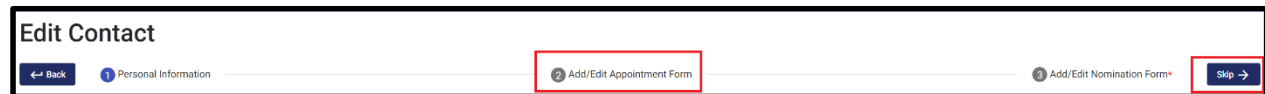
(NOTE: nomination form required only for initial appointment)

☐ Is a small business in accordance with:
[Table of size standards \(sba.gov\)](#)

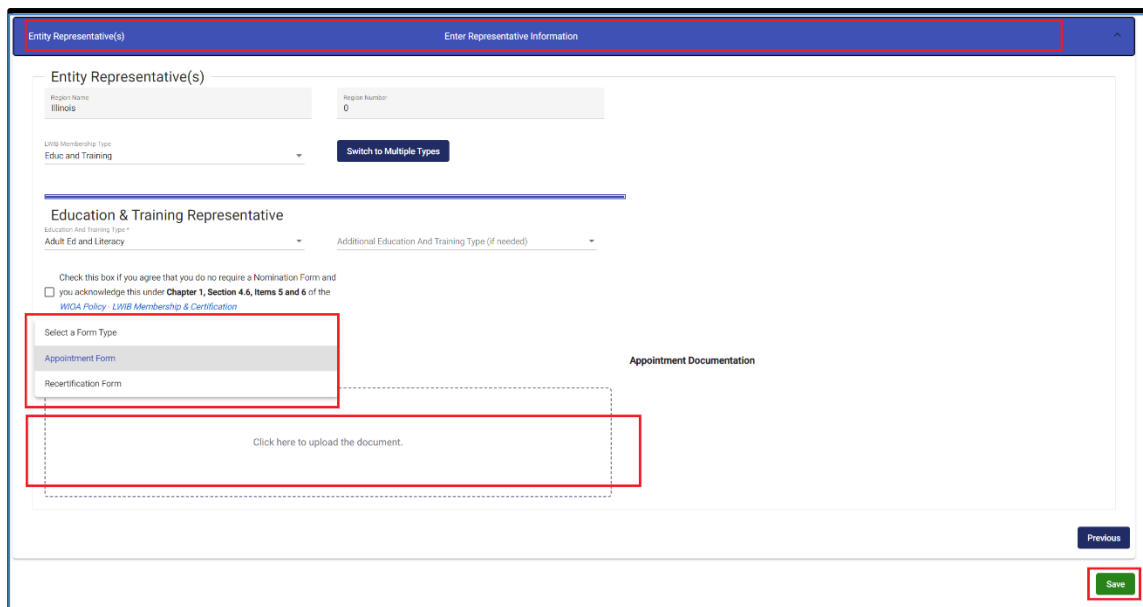
1. Once the form is confirmed accurate, select **Print**. You will be prompted to save the PDF.
2. Click the X in the top right to close the modal.

Uploading The Appointment Form

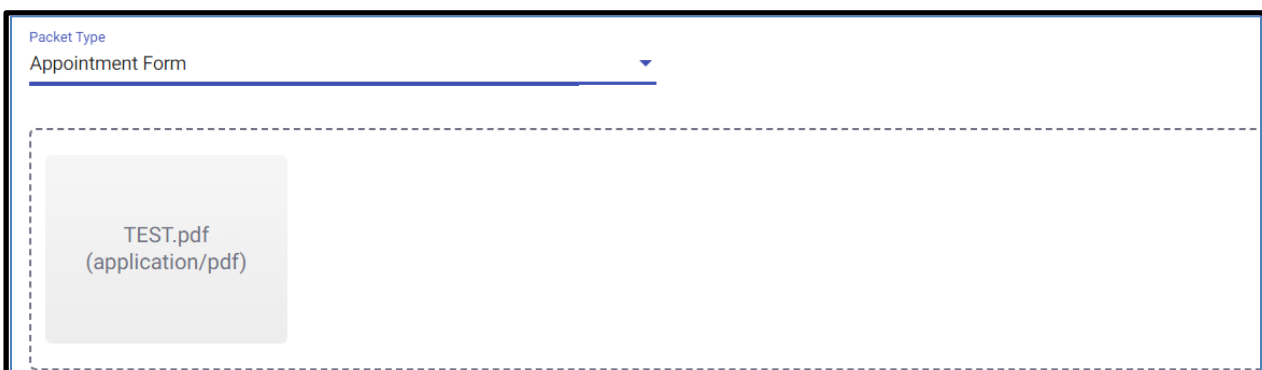
1. Once the Appointment Form has been signed, search for the contact and click on the Edit button.
2. Click the **Add/Edit Appointment Form** or click **Skip** to navigate to the Appointment Form page.
3. On the Appointment Form, scroll down and click the **Representative Information** banner.
4. Click on **Packet Type** and select **Appointment Form** 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.

Edit Contacts

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

LWIA	First Name	Last Name	Job Title	Email	Contact Phone	Organization	Last Updated By	Last Updated Date	Contact Type	Current Status	Action
20	Testing	McTester	Testing Master	drtest@noemail.com	(217) 555-1234	Land of Lincoln Workforce Alliance, 1300 South 9th Street, Springfield, IL 62703-2527		9/8/2022	LWIB Member	Pending State	Edit Verify

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.
3. Make the necessary revisions to the Personal Information screen. If the contact is a LWIB Member click **Next** to proceed to the Appointment Form, and if applicable, again to proceed to the Nomination Form. For Individual contacts, press **Save** to complete your changes.

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	Verify

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:

Approve/Reject Appointment

Pending LWIB
Send to State
Departed

Reason for Rejection
This is rejected because...

Update Status

ContactAppointmentNomination

Contact Information

REJECTED BY STATE

Comments
This is rejected because...

Board Member Options

- 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.
- Send to State – Submit LWIB Member to the State for approval post rejection.
- Departed – Make an Active LWIB Member contact departed.

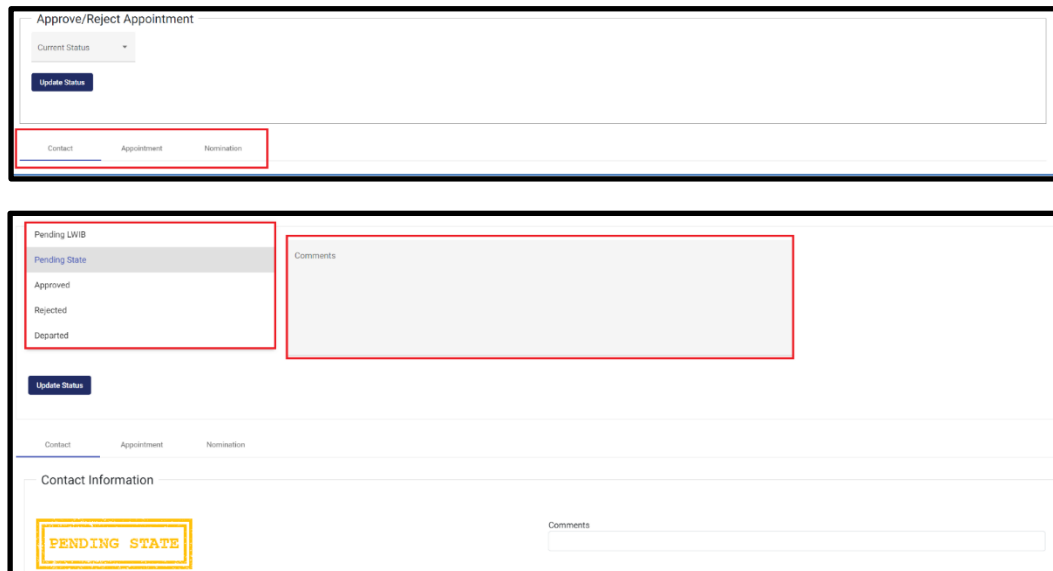
State Options

- 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.

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**.



The first screenshot shows the 'Approve/Reject Appointment' form. It features a 'Current Status' dropdown menu and an 'Update Status' button. Below the form, there are three tabs: 'Contact', 'Appointment', and 'Nomination'. The 'Contact' tab is selected and highlighted with a red box.

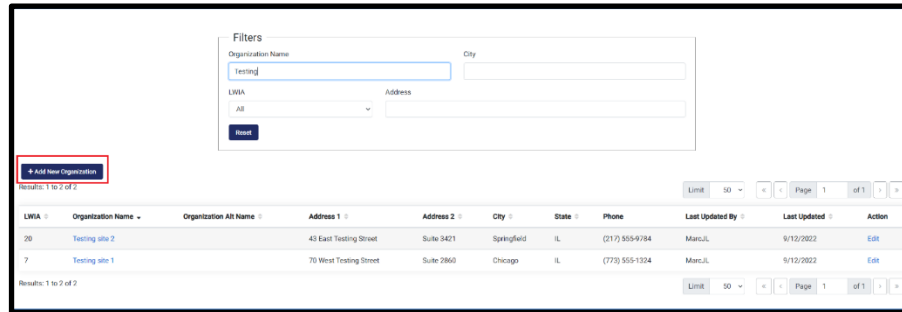
The second screenshot shows the 'Contact Information' form. It features a dropdown menu with options: 'Pending LWIB', 'Pending State', 'Approved', 'Rejected', and 'Departed'. The 'Pending State' option is highlighted with a red box. To the right of the dropdown is a 'Comments' text area, also highlighted with a red box. Below the dropdown is an 'Update Status' button. At the bottom of the form, there is a 'Contact Information' section with a 'PENDING STATE' label highlighted by a yellow box, and a 'Comments' text area.

Organizations

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

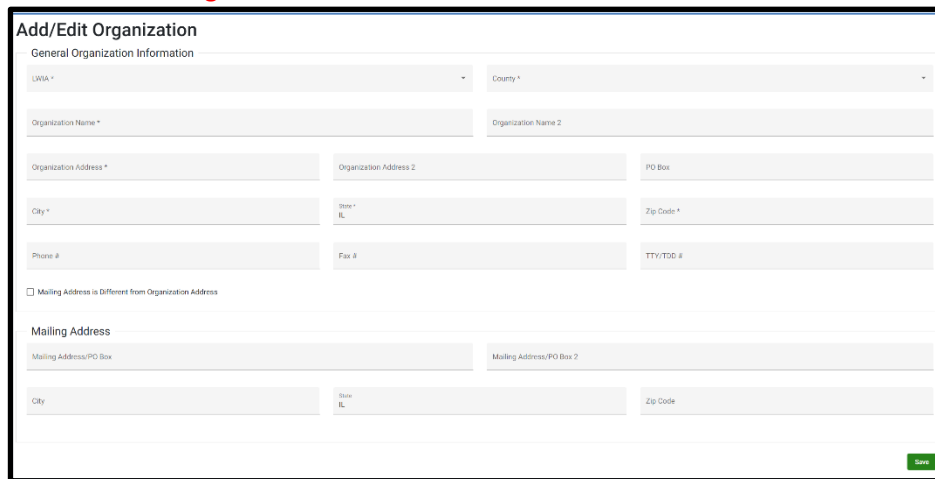
Add New Organization

To add a new Organization via the Organization screen:



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) 555-9784	ManuJL	5/12/2022	Edit
7	Testing site 1		70 West Testing Street	Suite 2860	Chicago	IL	(773) 555-1124	ManuJL	5/12/2022	Edit

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

Save

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**
 - m. **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

All

Address

[Reset](#)

[+ 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	

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.

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	Edit

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	john.doe@noemail.c	(217) 555-1234	7/11/2023	LWIB Member	

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