

# DOCUMENTS & REPORTS



Updated: October 2023

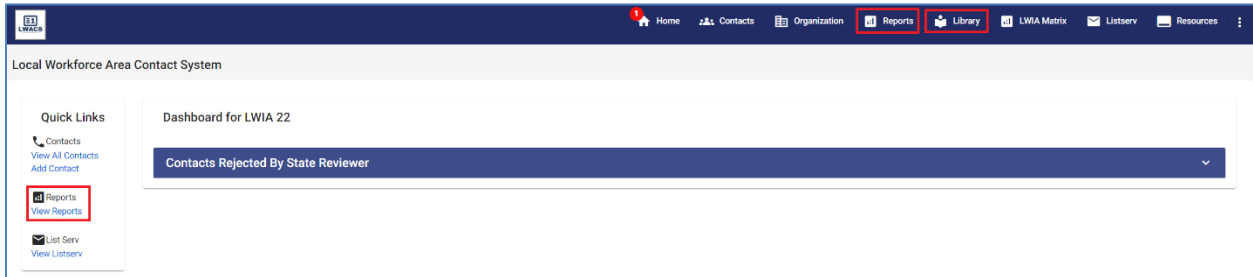


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### Document Library and Reports

The Document Library and Reports screens allow users to submit required documentation to the OET staff along with generate reports designated to their specific LWIA for membership, the composition summary form, and more.



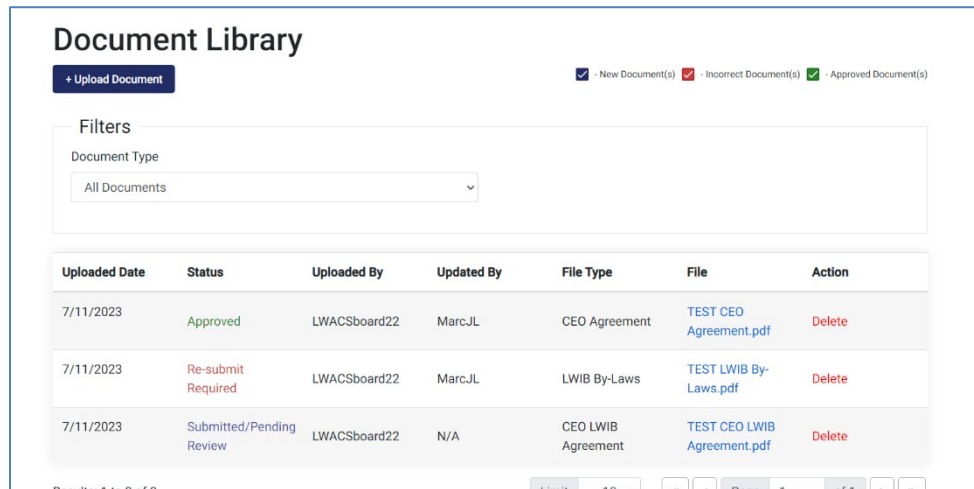
1. The Document Library can be access by selecting Library in the LWACS header.
2. The Reports section can be accessed by selecting Reports in the LWACS header or by selecting View Reports under quick links.

### Document Library

The Document Library is the new method to send the required documents to the OET staff.

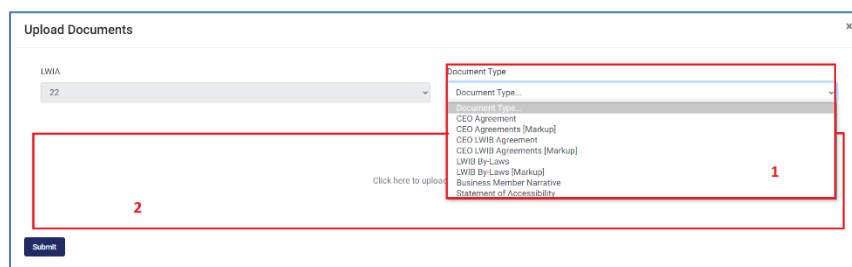


To access click the **Library** icon in the header.



1. In the document library, the user can see a list of all submitted documentation along with their uploaded date, file type, and the respective status.
  - a. Submitted/Pending Review – Default status for newly uploaded documents.
  - b. Approved – Document accepted by the State.
  - c. Re-submit Required – Document rejected by the State. Correction/re-upload required.

- To upload a new Document, click the **Upload Document** button. A new modal will display.



- Use the Documents Type filter and Select the Document Type you are uploading.
  - CEO Agreement
  - CEO Agreement [Markup]
  - CEO LWIB Agreement
  - CEO LWIB Agreement [Markup]
  - LWIB By-Laws
  - LWIB By-Laws [Markup]
  - Business Member Narrative
  - Statement of Accessibility
- Click in the upload section to select a file from your computer or drag a PDF into the box to immediately upload.
- On document the file name shows in the upload section, click **Submit**.



### Composition Summary Form

The Composition Summary form is a system-generated grid outlines the make-up of the selected LWIAs Board Members.

			Entity Representing																									
			Reason for Submission				Business (More than 50% of Board Membership)				Workforce (At least 20% of Board Membership)				Education & Training			Governmental & Economic / Community Development				Other						
Name	Initial Appointment Date	Term Expiration Date	Current Member	Appointment	Filing Vacancy	Re-Appointment	Business & Employees (At least 50% of Board Membership)	Business & Employees (Not a formal business)	Charterperson (One selected from Business)	Labor Organizations (At least 1 Representative)	Labor/Representative	CEO for Employment Training of Education	Employment Training or Education for Youth	Single Providers of Adult Education	Institutions of Higher Education (1 or 1)	Local Educational Agencies and CBOs	Economic and Community Development (1 or 1)	State Employment Training and Wage Program (1 or 1)	Programs under Title of the Rehabilitation Act (1 or 1)	Transportation, Housing and Public Assistance	Volunteer Organizations	One of 40 members appointed by the CEO						
Total for Category:			24	10	7	5	19				8				3			3				1						
Totals			Members = 34				Total Represented = 34				9	13	0	3	1	4	3	1	1	1	1	1	1	1	1	0	0	1
Lisa B.	10/1/2019	9/30/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carrie B.	10/1/2020	9/30/2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lesia Br.	1/18/2017	9/30/2023	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
James B.	10/1/2020	9/30/2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gloria B.	5/8/2019	9/30/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Missy B.	10/1/2019	9/30/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eric C.	10/1/2015	9/30/2023	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chelsee C.	9/11/2019	9/30/2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cyndi C.	2/24/2020	9/30/2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Accessing the Composition Summary Form

1. Click on the **Summary Form** tab.
2. Select an **LWIA** from the dropdown.
3. Once an LWIA is selected, the Summary Form and additional filters will display.
4. All checkboxes correspond with the selected information on the contact's Appointment Form screen. (See the [Contact Management Guide](#) if you need to make any updates to a contact's information)

### Summary Form Filters


The summary form list can be filtered by the Appointment Date, Expiration Date, and to only show Current Members.


#### Filters

LWIA  
20

**APPOINTMENT DATE\***


Select a Range [Reset Appointment Date](#)

Start Date 

End Date 

**EXPIRATION DATE\***

Select a Range [Reset Expiration Date](#)

Enter a Date 

Show only Current Members\*

\* Applying these filters will remove the ability to attest that the document is correct.

[Reset](#)

1. Filter contact by a single Appointment or Expiration Date by inputting a date in the **Enter a Date** field. Results filter on the Summary Form to contacts that have an Appointment or Expiration Date respectively on the entered value(s).
2. Filter by an Appointment or Expiration Date range, click the **Select a Range** box and enter the **Start Date** and **End Date**. Results filter on the Summary Form to contacts that have an Appointment or Expiration Date range respectively on the entered value(s).
3. Check the **Show only Current Members** box to filter contacts to only current members.
4. Click the **Reset Appointment/Expiration Date** button to clear the filter.

### Summary Form Header

The Summary Form headers provide information on board member's entity classification, member counts, and alerts users of incomplete board representation.

Name	Appoint. Date	Term Expires	Reason for Submission				Business (More than 50% of Board Membership)			Workforce (At least 20% of Board Membership)				Education & Training			Governmental & Economic / Community Development					Other	
			Current Member	Appointment	Filling Vacancy	Re-Appointment	Business & Employers (A United Business as defined by SBA)	Business & Employers (NOT a small business)	Chairperson (One member selected from a Business entity)	Labor Organization (At least 2 representatives)	Labor/Apprenticeship	CBO for Employment, Training or Education	Employment, Training, or Education for Youth	Eligible Providers of Adult Education and Literacy (1=1)	Institution of Higher Education (1=1)	Local Educational Agencies and CBOs (1=1)	Economic and Community Development (1=1)	State Employment Services under Wagner-Peyser (1=1)	Programs under Title 1 of the Rehabilitation Act (1=1)	Transportation, Housing and Public Assistance	Philanthropic Organizations	Others as Deemed Appropriate by the CEO	
Total for Category			24	10	7	5	19	6	13	8	3	1	4	0	1	1	1	1	1	1	0	0	1
Totals			Members = 34				Total Represented = 34																
Lisa B	10/1/2019	9/30/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Information is dividing into multiple, color-coded sections to provide information at a glance, and warn users of any gaps in board composition.

1. **Reason for Submission (Red)** – Display the member appointment information.
  - a. Current Member
  - b. Appointment
  - c. Filling Vacancy
  - d. Re-Appointment
2. **Business (Purple)** – Displays breakdown of Board Members associated with a Business entity. **Must make up great than 50% of the board.**
  - a. Business & Employers (as defined by the [SBA](#))
  - b. Business & Employers (NOT a small business)
  - c. Chairperson (One member selected from a Business entity)
3. **Workforce (Orange)** - Displays breakdown of Board Members associated with a Workforce entity. **Must make up at least 20% of the board.**
  - a. Labor Organization (**at least 2 members**)
  - b. Labor/Apprenticeship
  - c. CBO for Employment, Training, or Education
  - d. Employment, Training, or Education for Youth
4. **Education & Training (Green)** - Displays breakdown of Board Members associated with an Education & Training entity.
  - a. Eligible Providers of Adult Education and Literacy (**at least 1 member**)
  - b. Institution of Higher Education (**at least 1 member**)
  - c. Local Educational Agencies and CBOs.
5. **Governmental & Economic/Community Development** - Displays breakdown of Board Members associated with a Governmental & Economic/Community Development entity.
  - a. Economic and Community Development (**at least 1 member**)
  - b. State Employment Services under Wagner-Peyser (**at least 1 member**)
  - c. Programs under Title 1 of the Rehabilitation Act (**at least 1 member**)
  - d. Transportation, Housing, and Public Assistance
  - e. Philanthropic Organizations
6. **Other** -
  - a. Others as Deemed Appropriate by the CEO.

### Summary Form Counts

Board must have certain member compositions to meeting representation standard. The header shows the total membership, along with the representation across the four sectors. Some sectors have composition guidelines such as Business entity members making up at least 50% of the board. The member totals and category totals are display as the third and forth row on the header.

		Reason for Submission				Business (More than 50% of Board Membership)			Workforce (At least 20% of Board Membership)			
Init. Appointment Date	Term Expiration Date	Current Member	Appointment	Filling Vacancy	Re-Appointment	Business & Employers (A small business as defined by SBA)	Business & Employers (NOT a small business)	Chairperson (One selected from Business)	Labor Organizations (At least 2 Representatives)	Labor/Apprenticeship	CBO for Employment, Training or Education	Employment Education
Total for Category:		24	10	7	5	19			8			
Members = 34	Total Represented = 34					6	13	0	3	1	4	0

If a membership representation standard is not met, the corresponding column will be highlighted red. In the example above, no contact has been indicated as a Board Chairperson selected from a Business entity. A new contact will need to be added (see the Contact Management guide), or if an existing contact is serving in that role, a contact's Appointment From can updated to satisfy the representation standard.

### View/Edit Contact Information

Contact Profile Information, Appointment Forms, and Nominations Forms can be view from the CSF.

		Total for Category:				19			
Totals:	Members = 34	Total Represented = 34					6	13	0
Lisa B	10/1/2019	9/30/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carrie B	10/1/2020	9/30/2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lesa Br	1/18/2017	9/30/2023	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Click the **contact's name** in the Summary Form list.
2. A modal will display showing the Contact Profile Information.

Additional Information
✕

Edit Verify

Contact
Appointment
Nomination
Audit Log

**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

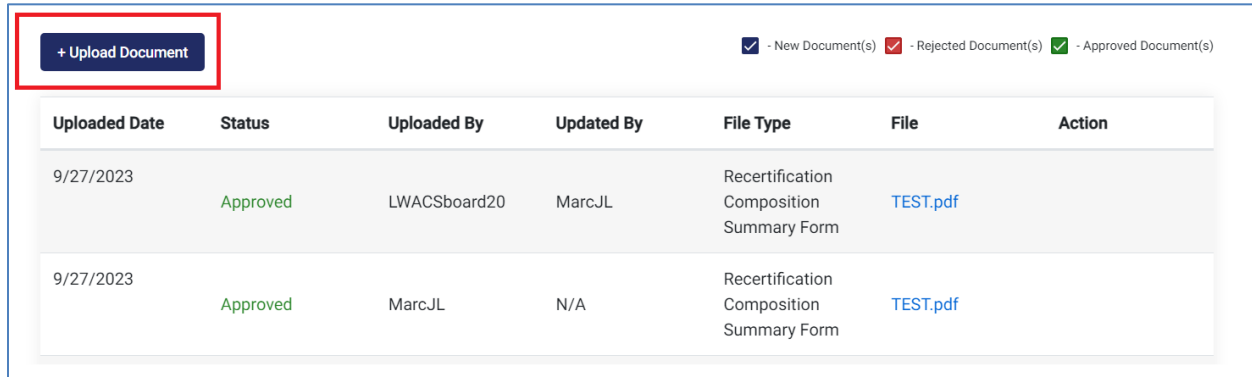




### Uploading a Signed Composition Summary Form

Once the Composition Summary Form has been signed by the CEO, it needs to be uploaded into LWACS.

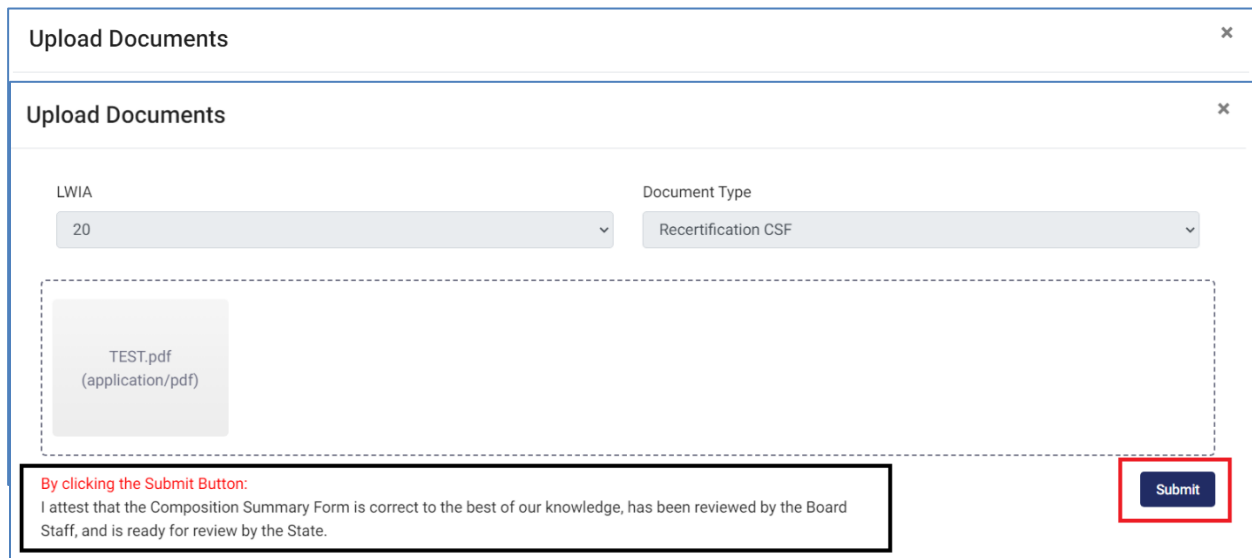
1. Click on the **Reports** icon in the header and select **LWIA CSF Library**.



- New Document(s)  - Rejected Document(s)  - Approved Document(s)

Uploaded Date	Status	Uploaded By	Updated By	File Type	File	Action
9/27/2023	Approved	LWACSboard20	MarcJL	Recertification Composition Summary Form	<a href="#">TEST.pdf</a>	
9/27/2023	Approved	MarcJL	N/A	Recertification Composition Summary Form	<a href="#">TEST.pdf</a>	

2. Click **Upload Document**. This will bring up the Upload modal.
3. The LWIA and Document Type will automatically set.



Upload Documents

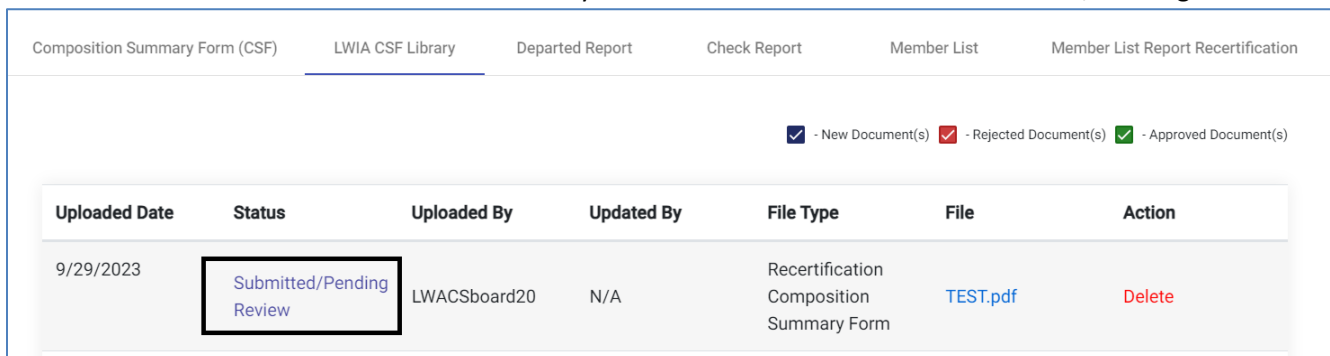
LWIA: 20 | Document Type: Recertification CSF

TEST.pdf (application/pdf)

By clicking the Submit Button:  
I attest that the Composition Summary Form is correct to the best of our knowledge, has been reviewed by the Board Staff, and is ready for review by the State.

Submit

4. Either **drag your documents into the upload box** or **click in the box** to select the document from your PC.
5. Read the Submission Statement. If you believe it is accurate, click **Submit** to submit the CSF for State approval.
6. You should now see in the CSF Library that the document is listed as Submitted/Pending Review.



Composition Summary Form (CSF) | **LWIA CSF Library** | Departed Report | Check Report | Member List | Member List Report Recertification

- New Document(s)  - Rejected Document(s)  - Approved Document(s)

Uploaded Date	Status	Uploaded By	Updated By	File Type	File	Action
9/29/2023	Submitted/Pending Review	LWACSboard20	N/A	Recertification Composition Summary Form	<a href="#">TEST.pdf</a>	Delete

7. Once it is review by the State, the status will update to reflect its approval or rejection.

Uploaded Date	Status	Uploaded By	Updated By	File Type	File	Action
9/29/2023	Re-submit Required	LWACSboard20	MarcJL	Recertification Composition Summary Form	TEST.pdf	Delete
9/27/2023	Approved	LWACSboard20	MarcJL	Recertification Composition Summary Form	TEST.pdf	

### Departed Report

Display list of LWIB members in each LWIA that have left (departed) on the board.

Summary Form **Departed Report** Check Report Member List Member List Report Recertification

This is used by OET to tell which LWIB members (by local workforce innovation area) are no longer on the board. It is used for all LWIB submissions--appointments, reappointments and recertifications.

**Filters**

LWIA: 20

DEPARTED DATE:  Select a Range [Reset Expiry Date](#)

Enter a Date:  [📅](#)

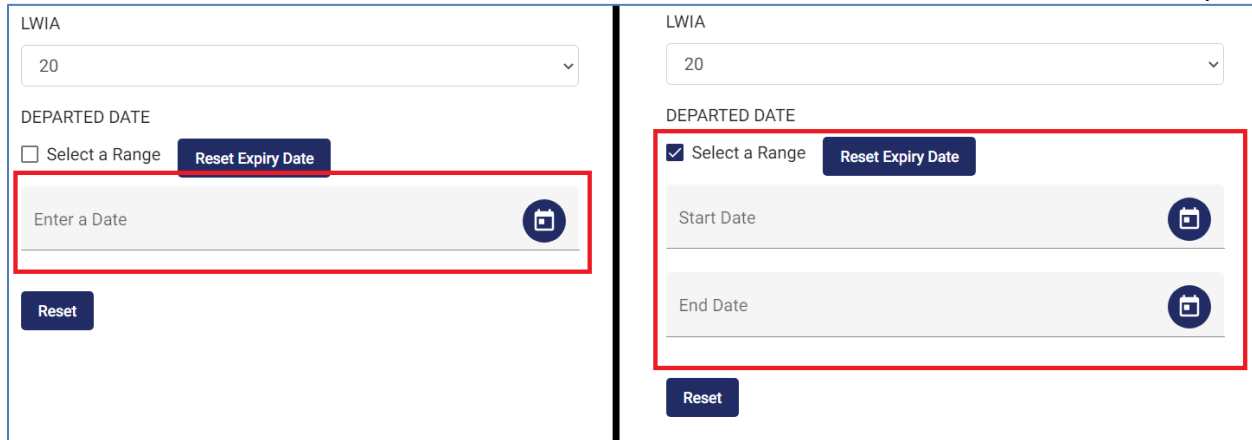
[Reset](#)

Results: 1 to 34 of 34

Limit: 50 Page 1 of 1

LWIA	First Name	Last Name	Organization	Date Left	Initial Start Date	Term Expiration	Person Replaced	County	Membership Type
20	ATester	ALast	Styles-N-More	10/1/2019	10/1/2016	9/30/2019	ATesting Person	Menard	Business
20	BTester	BLast	Solomon Colors	2/24/2020	10/1/2019	9/30/2020	BTesting Person	Sangamon	Business
20	Lynn	CLast	Lincoln Land Community College	10/1/2020	10/1/2019	9/30/2022	CTesting Person	Sangamon	Educ and Training

1. Selected the **Departed Report** tab.
2. Select the **LWIA** from the Dropdown. Note: Non-state users are restricted to their assigned LWIA(s).
3. View the populated list of Departed Contacts.



The image displays two side-by-side screenshots of the LWACS Reports interface, illustrating different filtering options for the 'DEPARTED DATE' section. Both screenshots show the 'LWIA' dropdown menu set to '20' and a 'Reset Expiry Date' button.

**Left Screenshot:** The 'DEPARTED DATE' section has the 'Select a Range' checkbox unchecked. A red box highlights the 'Enter a Date' input field, which includes a calendar icon. A 'Reset' button is located below the input field.

**Right Screenshot:** The 'DEPARTED DATE' section has the 'Select a Range' checkbox checked. A red box highlights the 'Start Date' and 'End Date' input fields, each with a calendar icon. A 'Reset' button is located below the input fields.

- Results can be filtered by a single Departed Date by using the **Enter a Date** field, or
- Check the box **Select a Range** and enter the **Start Date** and **End Date** to filter by a date range.
- Click the **Reset** button to clear all filters.

### Check Report

Display a list of all LWIB Member in each LWIA that were approved with the last submission.

Summary Form   Departed Report   **Check Report**   Member List   Member List Report Recertification

This is used by OET to tell which LWIB members (by local workforce innovation area) were approved with the last submission. This is used to compare the approved LWIB members with a new submission. It is used for all LWIB submissions--appointments, reappointments and recertification's.

**Filters**

LWIA  
20

Reset

Excel   PDF

Results: 1 to 34 of 34   Limit 50   Page 1 of 1

LWIA	First Name	Last Name	Organization	Initial Start Date	Term Expiration	Membership Type	Naics Code	Industry Sector	Employees	County
20	ATest	ALast	Mosquito Squad	10/1/2019	9/30/2022	Business	56-1710	Administrative, Support, Waste Management, and Remediation Services (56)	10	Menard
20	BTest	BLast	Alliance Community Bank	10/1/2020	9/30/2023	Business	52-2110	Finance and Insurance (52)	32	Menard
20	CTest	CLast	Favor Management Consulting	1/18/2017	9/30/2023	Business	54-1611	Professional and Technical Services (54)	1	Sangamon

1. Selected the **Check Report** tab.
2. Select the **LWIA** from the Dropdown. Note: Non-state users are restricted to their assigned LWIA(s).
3. View the populated list of Contacts.

### Member List

Displays a list of all approved LWIB members in each LWIA that are actively serving on the Board.

Summary Form   Departed Report   Check Report   **Member List**   Member List Report Recertification

This is used by OET and is a list of the approved LWIB members (by local workforce innovation area). It is used for appointments and reappointments and is attached to the approval letter. It could be used for recertification also.

**Filters**

LWIA  
20

Reset

Excel   PDF

Results: 1 to 34 of 34   Limit 50   Page 1 of 1

LWIA	First Name	Last Name	Organization	Membership Type	Term Expiration	Initial Start Date
20	ATest	ALast	Mosquito Squad	Business	9/30/2022	10/1/2019
20	BTest	BLast	Alliance Community Bank	Business	9/30/2023	10/1/2020
20	CTest	CTest	Favor Management Consulting	Business	9/30/2023	1/18/2017

1. Selected the **Member List** tab.
2. Select the **LWIA** from the Dropdown. Note: Non-state users are restricted to their assigned LWIA(s).
3. View the populated list of Contacts.