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## Document Library and Reports

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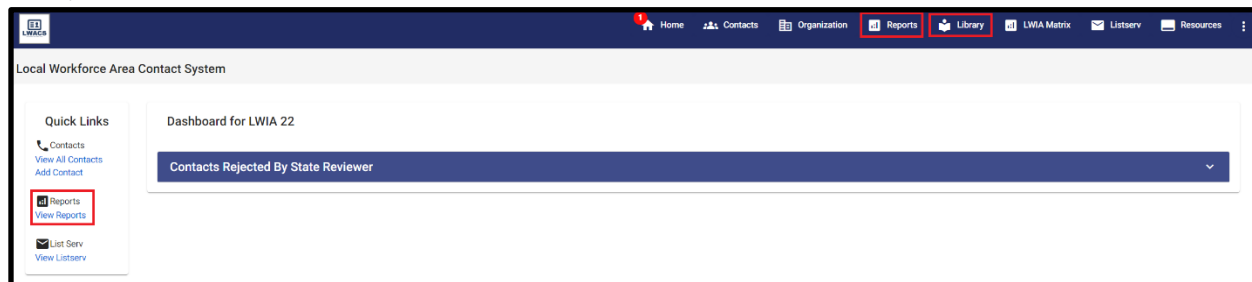


- The Document Library can be accessed by selecting Library in the LWACS header.
- The Reports section can be accessed by selecting Reports in the LWACS header or by selecting View Reports under quick links.

## Document Library – LWIA Documents and Legal

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

Select the Library icon in the LWACS header, then select LWIA Documents and Legal.

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.
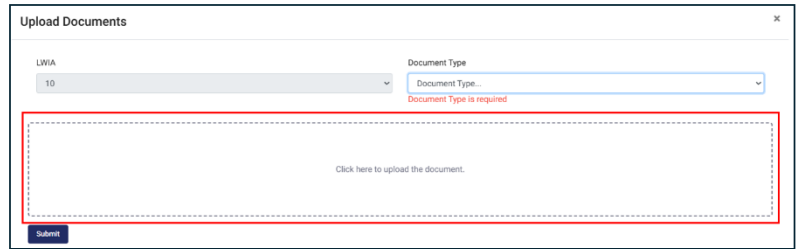   c. Re-submit Required – Document rejected by the State. Correction/re-upload required.
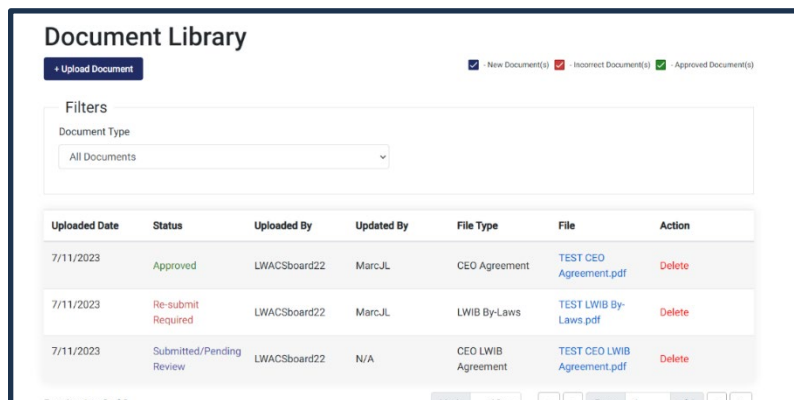


2. To upload a new Document, click the Upload Document button. A new modal will display. Use the Documents Type filter and select the document type you are uploading from the dropdown menu.
   - CEO Agreement CEO Agreement [Markup]
   - CEO LWIB Agreement
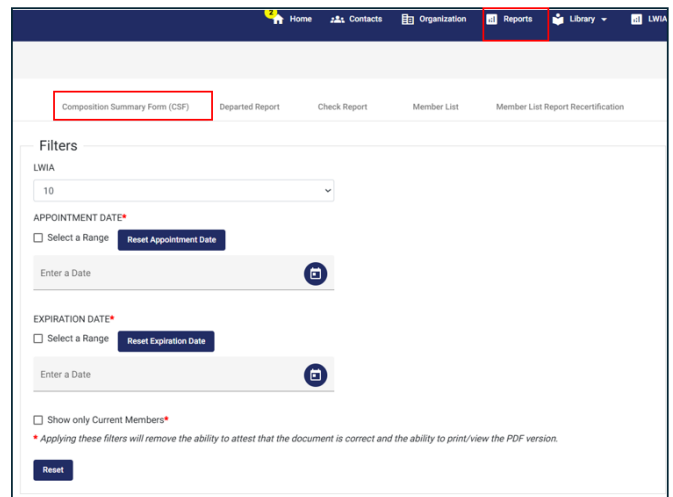   - CEO LWIB Agreement [Markup]
   - LWIB By-Laws
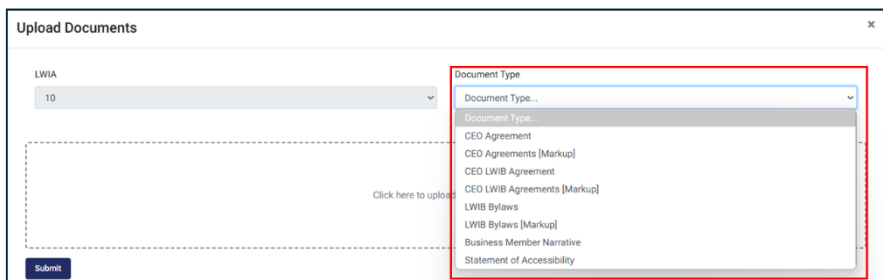
- LWIB By-Laws [Markup]
- Business Member Narrative
- Statement of Accessibility
a. Click in the upload section to select a file from your computer or drag a PDF into the box to immediately upload.



b. On document the file name shows in the upload section, click Submit.

## Composition Summary Forms

### Accessing the Composition Summary Form

1. Select Reports from the LWACS header.
2. The first tab is the Composition Summary Form (CSF).
3. Select an LWIA from the dropdown.
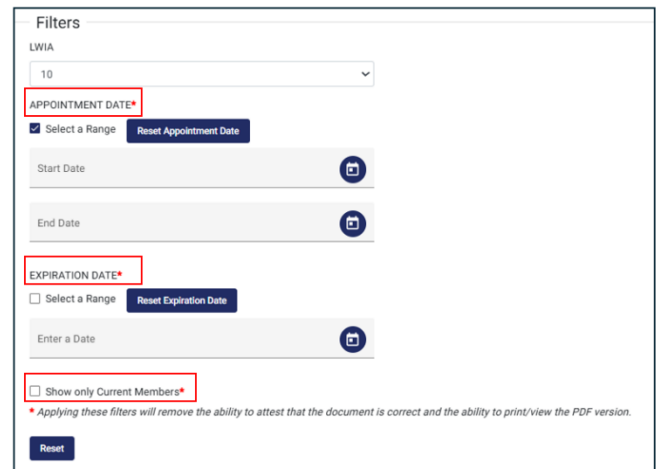4. Once an LWIA is selected, the Summary Form and additional filters will display.



## Summary Form Filters

The summary form list can be filtered by:
- Appointment Date
- Expiration Date
- Show only Current Members

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).

1. Filter by an Appointment or Expiration Date

range, click the Select a Range box and enter the State 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).

2. Check the Show only Current Members box to filter contacts to only current members.
3. 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.



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.

Note: An error message will display at the top and the bottom of the form if there are errors. The PDF button is not available if the form has errors and needs to be fixed.

Instructions and CEO Sheet are available resources.

## 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.
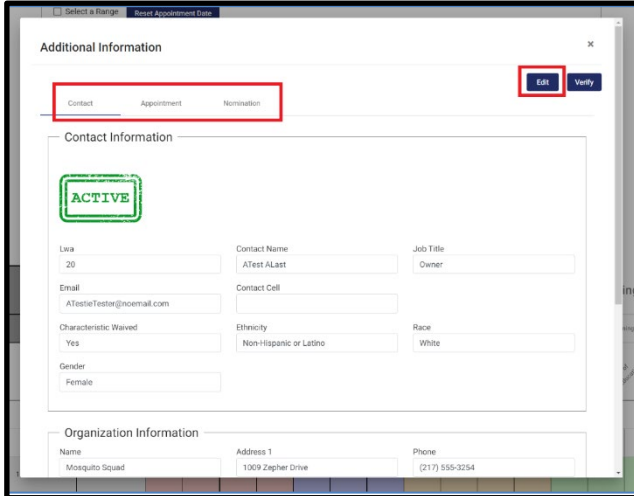
## View/Edit Contact Information

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

| | | **Total for Category:** | 24 | 10 | 7 | 5 | 19 | | |
|---|---|---|---|---|---|---|---|---|---|
| | **Totals:** | Members = 34 / Total Represented = 34 | | | | | 6 | 13 | 0 |
| Lisa B | 10/1/2019 | 9/30/2022 | ☑ | ☐ | ☐ | ☐ | ☑ | ☐ | ☐ |
| Carrie B | 10/1/2020 | 9/30/2023 | ☐ | ☑ | ☑ | ☐ | ☐ | ☑ | ☐ |
| Lesa Br | 1/18/2017 | 9/30/2023 | ☑ | ☐ | ☐ | ☑ | ☑ | ☐ | ☐ |

1. Click the contact's name in the Summary Form list.

2. A modal will display showing the Contact Profile Information.



3. Use the tabs to navigate and view the Appointment and Nomination information.
4. If there are any discrepancies, click the Edit button to return to the Contact Management screens and update any information and upload any new Appointment Forms. Once the changes are submitted, they will be reflected on the Appointment Form. (see the Contact Management guide for the contact edit instructions)
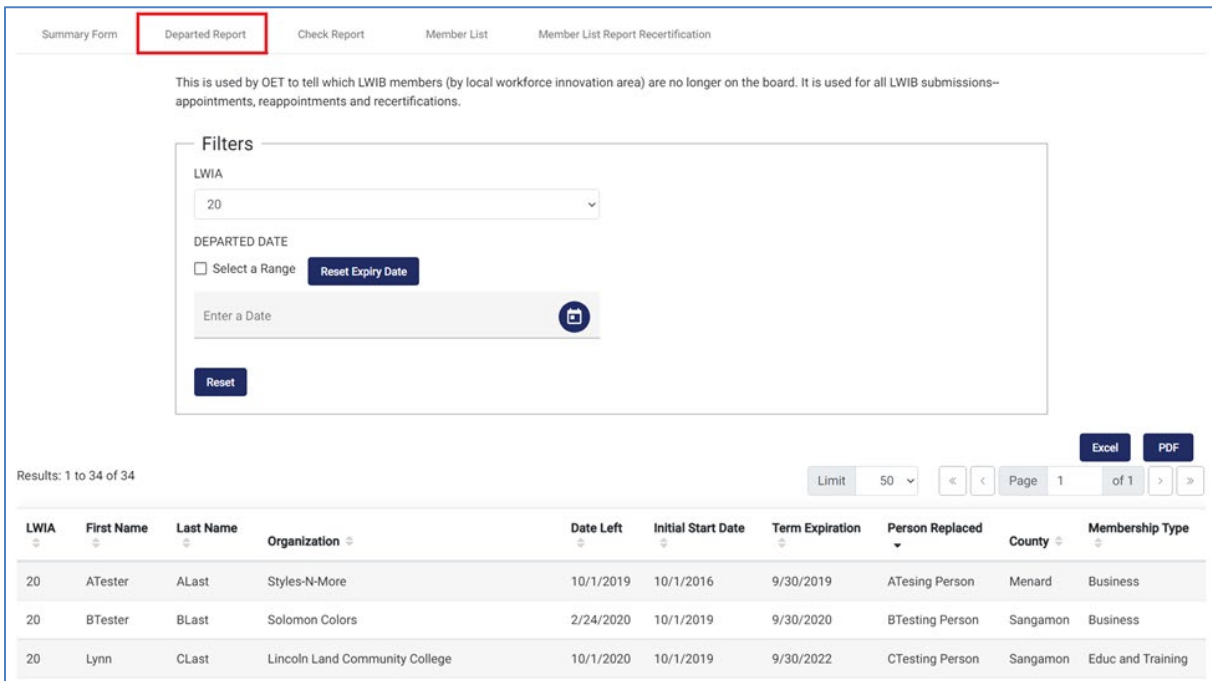
## Attesting Summary Form

Once the Summary Form has been reviewed and it is ready for submission to the State, a Board Staff member must be attested for.

1. Scroll down the bottom of the page.
2. Click the checkbox label [Enter text here]
3. The Name/Username of the board staff contact, and the date/time will be recorded.

## Departed Report

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



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



   a. Results can be filtered by a single Departed Date by using the Enter a Date field, or

   b. Check the box Select a Range and enter the State Date and End Date to filter by a date range.

   c. 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
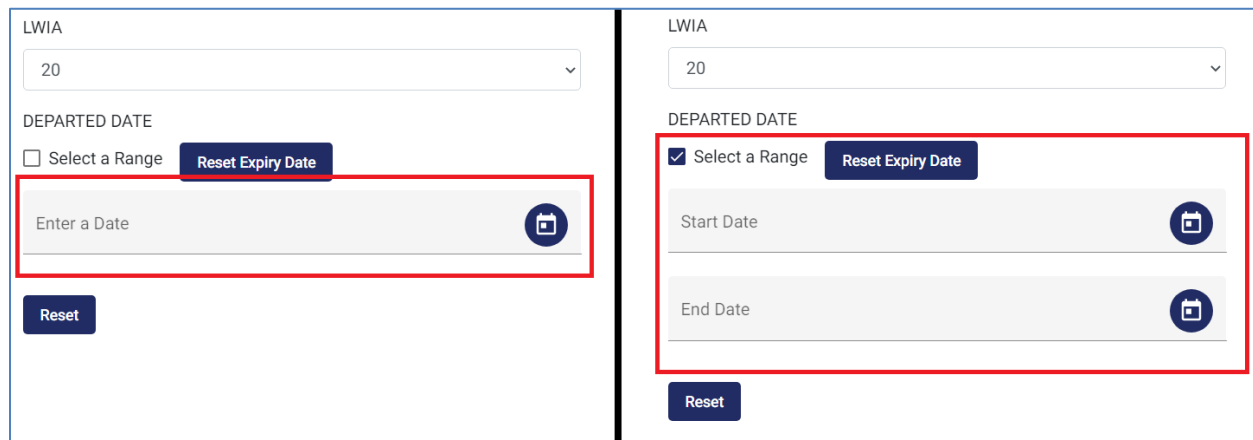
Reset

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. <u>Note</u>: 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. <u>Note</u>: Non-state users are restricted to their assigned LWIA(s).
3. View the populated list of Contacts.