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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.

E1 LWAC5		Home	22 Contacts	Organization	al Reports	📩 Library	d LWIA Matrix	✓ Listserv	Resources	:
Local Workforce Area C	Contact System									
Quick Links Contacts View Al Contacts Ad Contact Mere Reports View Reports View Reports View Listerv View Listerv	Dashboard for LWIA 22 Contacts Rejected By State Reviewer								*	

- 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.

- 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.

+ Upload Document	nt Library			New Document(	s) 🔽 - Incorrect Document	s) 🔽 - Approved Document(s)
Filters Document Type All Documents			•			
Uploaded Date	Status	Uploaded By	Updated By	File Type	File	Action
7/11/2023	Approved	LWACSboard22	MarcJL	CEO Agreement	TEST CEO Agreement.pdf	Delete
7/11/2023	Re-submit Required	LWACSboard22	MarcJL	LWIB By-Laws	TEST LWIB By- Laws.pdf	Delete
7/11/2023	Submitted/Pending Review	LWACSboard22	N/A	CEO LWIB Agreement	TEST CEO LWIB Agreement.pdf	Delete

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

load Documents			
LWIA	1	Document Type	
10	~	Document Type	
		CEO Agreement	
		CEO Agreements [Markup]	
		CEO LWIB Agreement	
	Click here to uploa	CEO LWIB Agreements [Markup]	
		LWIB Bylaws	
		LWIB Bylaws [Markup]	
		Business Member Narrative	
Submit		Statement of Accessibility	



- 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.

LWIA		Document Type	
10	*	Document Type Document Type is required	
	Click here to upl	pad the document.	

# **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.

	🐴 Hor	ne <u>21</u> Contacts	Organization	🔝 Reports 🗳	Library 👻	a u
Composition Summary Form (CS	F) Departed Report	Check Report	Member List	Member List Repor	t Recertification	
Filters						
LWIA						
10		~				
APPOINTMENT DATE*						
Select a Range Reset Appointr	ment Date					
Enter a Date		•				
EXPIRATION DATE*						
Select a Range Reset Expiration	n Date					

#### **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

Filters			
LWIA			
10	~		
APPOINTMENT DATE*			
Select a Range Reset Appointment Da	te		
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	ity to attest that the document	is correct and the ability to print/view the	PDF versior
Reset			



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.

				Reason for	Submission		Business (More than 5	0% of Board I	decsbership)		kforce east 20% of 8	oard Member	ship)	Edu	vention & Train	ing			vmental & Eco unity Develop		5	Other	
Name	a suffered		Contract Mark	/	r sanding	and an and		and and and	All and	Salar Salar	and a start of the second	Solution of the second		a capacit		and the state	and a start	A CONTRACTOR		A LAND TO THE REAL	and the second	and a start	A Martin
		Total for Category	24	10	. 23	5		19				8			3				5			1	
Totale	Members - 34	Total Represented - 34					6	13	•	3	1	4	0	4	2	2	3	1	1	0	0	1	
Lisa B	10/1/2019	9/30/2022		0		۵	•			0	0	0						0					

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

- 1. <u>Reason for Submission</u> (Red) Display the member appointment information.
  - a. Current Member
  - b. Appointment
  - c. Filling Vacancy
  - d. Re-Appointment
- 2. <u>Business</u> (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. <u>Workforce</u> (Orange) Displays breakdown of Board Members associated with a Workforce entity. <u>Must make up at least 20% of the board</u>.
  - 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. <u>Education & Training</u> (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. <u>Governmental & Economic/Community Development</u> 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.

Enti	ty Representing		
force ast 20% of Board Membership)	Education & Training	Governmental & Economic / Community Development	Other Decomposition of the transformed before the other the the



#### **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.



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	Ű	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.

	Nomination		
Contact Information -			
ACTIVE			
Lwa	Contact Name	Job Title	
20	ATest ALast	Owner	
	<ul> <li>Manufacture</li> </ul>		
Email	Contact Cell		
Email ATestieTester@noemail.com	Contact Cell		
ATestieTester@noemail.com		Race	
ATestieTester@noemail.com	Contact Cell Ethnicity Non-Hispanic or Latino	Race White	
ATestieTester@noemail.com Characteristic Waived Yes	Ethnicity		
ATestieTester@noemail.com Characteristic Waived	Ethnicity		

- 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.

Summ	hary Form	Departed Report	Check Report	Member List Mem	ber List Report	Recertification					
			y OET to tell which LWIB membra , reappointments and recertifica		novation area	a) are no longer on the	board. It is u	sed for all LWIB	submissions-		
		- Filters	-								
		LWIA									
		20			~						
		DEPARTED	DATE								
		Select	a Range Reset Expiry Date								
		Enter a D	late	(	0						
		_									
		Reset									
											Excel PDF
Results: 1	to 34 of 34						Lin	nit 50 🗸	« ( <	Page 1	of 1 > »
LWIA ©	First Name	Last Name	Organization 🕆		Date Left	Initial Start Date	Term Expir	ation Perso	n Replaced	County 🗘	Membership Type
20	ATester	ALast	Styles-N-More		10/1/2019	10/1/2016	9/30/2019	ATesir	ng Person	Menard	Business
20	BTester	BLast	Solomon Colors		2/24/2020	10/1/2019	9/30/2020	BTest	ng Person	Sangamon	Business
20	Lynn	CLast	Lincoln Land Community Col	llege	10/1/2020	10/1/2019	9/30/2022	CTest	ing Person	Sangamon	Educ and Training

- 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.

LWIA	LWIA
20 ~	20 ~
DEPARTED DATE	DEPARTED DATE
Select a Range Reset Expiry Date	Select a Range Reset Expiry Date
Enter a Date	Start Date
Reset	End Date
	Reset

- 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.

Sumn	mary Form	Departed Repo	ort Check Report	Member List	Member List Rep	oort Recertification				
			WIB members with a new su	( )		,		t submission. This is used to compare the ents and recertification's.	٦	
		LWIA 20 Reset	•		~					
Results: 1	1 to 34 of 34		-					Limit 50 v « C Page	Excel 1 of	PDF
	First Name ≑	Last Name	Organization ≑	Initial Start Date ≑	Term Expiration 🖨	Membership Type ≑	Naics Code 騿	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 Departe	ed Report Check	Report Member List	Member List Report Recertification			
			a list of the approved LWIB member ter. It could be used for recertifica	ers (by local workforce innovation area ation also.	a). It is used for appointments ar	nd reappointments and is	
		Filters WIA 20 Reset		v			
Results: 1 to 3	34 of 34				Limit 50	▼ ≪ < Page	Excel PDF 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	r'	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.

