

November 18, 2021



Local System Administrator Training

Editing IWDS Client Screens

Acronyms used in this presentation

DCEO – Department of Commerce and Economic Opportunity

OET – DCEO Office of Employment and Training

IWDS – Illinois Workforce Development System

IwNC – Illinois workNet Center

LSA – Local System Administrator

Local System Administrator Training - Editing IWDS Client Screens



Overview

This training is not meant to be a substitute for the WIOA training series offered by OET.

This training is about what a Local System Administrator can change/edit on client screens after the client has been certified and how to submit for client modifications that need assistance from OET.

Overview

Please be aware that just because something can be changed doesn't always mean it should be changed.

The LSA needs to be aware of how those changes can affect client eligibility before making any alterations.

IWDS Client Levels

IWDS has 2 distinct levels for data entry.

Customer Level is where the most up to date information is stored. If a new application is added to an existing client, the customer information from that newest application will overwrite the existing Customer Level data. An IWDS user can also manually update the Customer Level data at any time.

There is only one Customer Level record per client.

Customer Menu

[Ruth Aaron](#)

Applications

- [List Applications](#)

Customer Profile

- [Contact Information](#)
- [Additional Contacts](#)
- [Private Information](#)
- [Veterans Information](#)
- [Employment History](#)
- [Credentials List](#)
- [Participant Periods](#)
- [Generate Swipe Card](#)

Referrals

- [Add Referral](#)
- [List Referrals](#)

Reports

- [Customer Info Report](#)
- [View Wages](#)

Local System Administrator Training - Editing IWDS Client Screens



IWDS Client Levels

The Application Level is where the client services are recorded.

A client can have multiple Application Level records. The client could be co-enrolled, or they could have pre-existing Inquirant or Exiter records.

List Applications
[Ruth Aaron](#)

4 found Page 1 of 1

	Name	SSN	App Date	Program	Status	TAA Status
<input type="button" value="View"/>	Aaron, Ruth	***-**- 7547	05/01/2020	WIOA	Registrant	
<input type="button" value="View"/>	Aaron, Ruth	***-**- 7547	07/01/2019	WIOA	Inquirant	
<input type="button" value="View"/>	Aaron, Ruth	***-**- 7547	07/05/2015	WIOA	Applicant	
<input type="button" value="View"/>	Aaron, Ruth	***-**- 7547	04/30/2011	WIOA	Exiter	

Page 1 of 1

Local System Administrator Training - Editing IWDS Client Screens



IWDS Client Levels

Each Application Level record is a “Snapshot in time”. Each Application should have the client’s correct information AT THE DATE/TIME OF THE APPLICATION.

So, if this client got married, moved, or had any other changes after the 5/1/2020 App Date, then the updated information would go on the Customer Level, as the Application Level was accurate on 5/1/2020.

List Applications

[Ruth Aaron](#)

Add Application

Return

4 found

Page 1 of 1

	Name	SSN	App Date	Program	Status	TAA Status
View	Aaron, Ruth	***-**-7547	05/01/2020	WIOA	Registrant	
View	Aaron, Ruth	***-**-7547	07/01/2019	WIOA	Inquirant	
View	Aaron, Ruth	***-**-7547	07/05/2015	WIOA	Applicant	
View	Aaron, Ruth	***-**-7547	04/30/2011	WIOA	Exiter	

Page 1 of 1

Add Application

Return

IWDS Client Records

Sometimes when a client comes into an LWIA, the career planner may forget to search for an existing IWDS record for the client or they may not find the existing record due to a name change or a spelling error.

Usually, what will happen is the career planner will get an error on the SSN when they try to save the new record. If this happens, the LSA should instruct the career planner to try 4 simple searches.

IWDS Client Records

There are 4 simple searches that will find 99.9% of existing IWDS clients. The 4 searches will take approximately 2 minutes to complete:

- 1) Partial Last Name and Last 4 SSN
- 2) Partial Last Name and Partial First Name (with or without Last 4 SSN)

How to search for clients in IWDS

Sample Client: Justina Thompson
DOB 6/5/1991
SSN 366-12-3456

- 1) The first search I would do is a partial last name and last 4 SSN:

Search Customers

Last Name: thomp
First Name:
SSN # (Last 4 Digits): 3456
Birth Date:
Filter List of Career Planners by LWA:

- 2) If the results are too large (too many pages), then I would do partial last name, partial first name, and last 4 SSN:

Search Customers

Last Name: thomp
First Name: jus
SSN # (Last 4 Digits): 3456
Birth Date:
Filter List of Career Planners by LWA:

IWDS Client Records

3) Last 4 SSN and Birth Date

4) Partial First Name and Last 4 SSN

These last two searches are essential if you think there could be a legal name change (especially if the client is female – more likely to have a legal name change with a marriage or divorce).

You could have 1 client with multiple applications with different last names.

3) If you think there has been a legal name change, another option would be Last 4 SSN and Birth Date:

Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits): 3456

Birth Date: 6/5/1991

Filter List of Career Planners by LWA:

4) Or partial first name and Last 4 SSN:

Search Customers

Last Name:

First Name: Just

SSN # (Last 4 Digits): 3456

Birth Date:

Filter List of Career Planners by LWA:

IWDS Client Records

If you discover that a client has multiple client level records and you are positive they are for the same person, there are 2 choices: delete the bad record(s) or request to merge the records.

List Customers

2 found Page 1 of 1

	Name	SSN	Address	Applications	LWA
<input type="button" value="View"/>	Masten BACILIO, JESUS		, IL 61102	0	
<input type="button" value="View"/>	Masten BACILIO, JESUS	***_**- 5473	, IL 61102	0	

Page 1 of 1

Local System Administrator Training - Editing IWDS Client Screens



IWDS Client Records

If the “bad record” has Case Notes or Universal Services, then OET recommends requesting a “merge”. If not, then request a “delete”.

Menus
[Staff Menu](#)
[Customer Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

Menus
[Staff Menu](#)
[Customer Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

List Case Notes

[JESUS Masten BACILIO](#)

0 found Page 0 of 0

Contact Date	Note Category	Program	Note Subject	Updated By	Created
There is nothing to display.					

Page 0 of 0

Services

[JESUS Masten BACILIO](#)

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
01/12/2018	01/12/2018	Resource Room Usage - Resource Center	Successful Completion	Rockford Resource Room

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IWDS Client Records

To request to merge or delete the records, the LSA will need to send an email to the IWDS System Administrators with a screen shot of the customer records (like the one on the right) and detail which record has the customer level information you want to keep on the merged record or which records to delete from IWDS.

Administrators with a screen shot of the customer records (like the one on the right) and detail which record has the customer level information you want to keep on the merged record or which records to delete from IWDS.

List Customers

2 found Page 1 of 1

	Name	SSN	Address	Applications	LWA
<input type="button" value="View"/>	Masten BACILIO, JESUS		, IL 61102	0	
<input type="button" value="View"/>	Masten BACILIO, JESUS	***_**- 5473	, IL 61102	0	

Page 1 of 1

Making Corrections to IWDS Clients

There are 4 different stages for an Application Level record:

- 1) Inquirant – Application started, but not certified
- 2) Applicant – Application certified, but no services entered
- 3) Registrant – Application certified, at least one service entered
- 4) Exiter – application certified, client services all closed, exit screen completed

List Applications

[Ruth Aaron](#)

Add Application

Return

4 found

Page 1 of 1

	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
View	Aaron, Ruth	***-**- 7547	05/01/2020	WIOA	Registrant		Chris Daniels
View	Aaron, Ruth	***-**- 7547	07/01/2019	WIOA	Inquirant		Chris Daniels
View	Aaron, Ruth	***-**- 7547	07/05/2015	WIOA	Applicant		Chris Daniels
View	Aaron, Ruth	***-**- 7547	04/30/2011	WIOA	Exiter		Chris Daniels

Page 1 of 1

Making Corrections to IWDS Clients

If the client is still in Inquirant status, the career planner can edit the client themselves as none of the fields are locked.

List Applications
[Bobbi Fieri](#)

1 found Page 1 of 1

	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
<input type="button" value="View"/>	Fieri, Bobbi	***-**-0231	03/01/2021	WIOA	Inquirant		Chris Daniels - career planner

Page 1 of 1

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

If the client is in Applicant or Registrant status, the LSA and the Career Planner can only edit unlocked fields.

Any locked fields will require a Modification Request form.

List Applications

[Bobbi Fieri](#)

1 found Page 1 of 1

	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
<input type="button" value="View"/>	Fieri, Bobbi	***_**- 0231	03/01/2021	WIOA	Applicant		Chris Daniels - career planner

Page 1 of 1

[Bobbi Fieri](#)

1 found Page 1 of 1

	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
<input type="button" value="View"/>	Fieri, Bobbi	***_**- 0231	03/01/2021	WIOA	Registrant		Chris Daniels - career planner

Page 1 of 1

Making Corrections to IWDS Clients

The Local System Administrator can edit fields, delete services, even delete eligibility certifications.

Application Menu

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Printable Application

Application

- [Guided Application](#)
- [Application Definition](#)
- [Assessment Summary](#)
- [Concurrent Programs](#)
- [Characteristics and Barriers](#)
- [Employment Characteristics](#)
- [Education Status](#)
- [Tests](#)
- [Public Assistance](#)
- [Family Characteristics](#)
- [Income Calculation](#)
- [Dislocated Worker Characteristics](#)
- [LWA Specific Data](#)
- [WIOA Training Criteria](#)
- [Eligibility Determination](#)

Profile

- [Contact Information](#)
- [Additional Contacts](#)
- [Private Information](#)
- [Veterans Information](#)
- [Employment History](#)
- [Credentials](#)
- [Education Status - In Program Update](#)
- [Measurable Skill Gains](#)
- [List All Documents](#)

Services

- [List Enrolled Services](#)
- [ITA Characteristics](#)
- [List Part Time/Distance Learning](#)

Exit

- [Exit Summary](#)
- [View Wages](#)
- [Performance Impact](#)

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Making Corrections to IWDS Clients

On the Application Definition screen, the LSA can change the IwNC or the Career Planner with the options in the dropdowns. The only choices in these 2 dropdown menus will be specific to the LWIA where the Local System Administrator is assigned.

If the client is not showing up in the career planner's "My Customers" menu, check to be sure the "Show on My Applications" field = Yes

If you change the "Contact Date", the IWDS system will not let the date be greater than the application date.

Application Definition
Bobbi Fieri

Statutory Program: WIOA

TAA Petition Number: - [Verify TAA Petition Number](#)

TAA Act: - [Verify TAA Petition Number](#)

NAFTA Petition Number: - [Verify NAFTA Petition Number](#)

LWA: 15 - United Workforce Development Board aka Career Link

***Illinois workNet(TM) Center:** Career Link - Tazewell County - 200

***Contact Date:**

Partner: 15 - City of Peoria Workforce Development Department

***Career Planner:** Daniels - career planner, Chris

Show on My Applications:

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Making Corrections to IWDS Clients

On the Application Definition screen, the LSA can also delete the entire Application by clicking the DELETE button.

CAUTION – this will delete almost EVERYTHING connected to this application. Services, certification, client data, test data, and more will all be deleted.

This will not delete case notes

Application Definition
[Bobbi Fieri](#)

Statutory Program: WIOA

TAA Petition Number: - [Verify TAA Petition Number](#)

TAA Act:

NAFTA Petition Number: - [Verify NAFTA Petition Number](#)

LWA: 15 - United Workforce Development Board aka Career Link

***Illinois workNet(TM) Center:** Career Link - Tazewell County - 200

***Contact Date:**

Partner: 15 - City of Peoria Workforce Development Department

***Career Planner:** Daniels - career planner, Chris

Show on My Applications:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Concurrent Programs screen, the LSA can change all of the choices.

Keep in mind, this should reflect concurrent programs for the client on the Application Date, not programs added after that date.

Concurrent Programs
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Adult Education:	No	▼
Job Corps:	No	▼
Farmworker Program:	No	▼
Native American Program:	No	▼
Veteran's Workforce Investment Pgms:	No	▼
Trade Adjustment Act:	No	▼
NAFTA-TAA:	No	▼
Vocational Education:	No	▼
Vocational Rehabilitation:	No	▼
Wagner-Peyser:	No	▼
Title V Activities (OAA):	No	▼
Comm Svc Blk Grant Program:	No	▼
HUD Program:	No	▼
Other non-WIOA program:	No	▼
Veteran's DVOP/LVER:	No	▼
Vocational Rehabilitation + Education:	No	▼
Both Vocational Rehabilitation and Vocational Rehabilitation + Education:	No	▼
Youth Build:	No	▼
Senior Community Service Employment Program:	No	▼

Save Cancel

Making Corrections to IWDS Clients

On the Characteristics and Barriers screen, the LSA cannot change any fields.

Any changes to this screen will require an IWDS Modification Request form.

Characteristics and Barriers

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Drug/Alcohol Dependency:No

English Language Learner:No

Language of Preference:French

Language Other:

Offender, Felon:No

Offender, Misdemeanor:No

Homeless:No

Single Parent Barrier:No

Facing Substantial Cultural Barriers:No

Foster Child:No

Youth Aged Out of Foster Care:No

Cancel

Making Corrections to IWDS Clients

On the Employment Characteristics screen, the LSA can only change the “Tenure” and the “Dependent of a seasonal, or migrant and seasonal farmworker” fields.

Changes to any other field on this screen will require an IWDS Modification Request form.

Employment Characteristics
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Labor Force Status: Unemployed
UI Status: Receiving Benefits
*Tenure:

Primarily Employed in Farm Work: No
Minimum Threshold of Farm Work Performed: No
Migrant Status:

Dependent of a seasonal, or migrant and seasonal farmworker:

Type of Qualifying Farm Work:
Under-Employed:
UI Profilee Date: None
UI Profilee Eligible: No

Making Corrections to IWDS Clients

On the Employment Status – Application screen, the LSA can only change the “Pell Grant Recipient” and the “Pell Grant Amount” fields.

Changes to any other field on this screen will require an IWDS Modification Request form.

Education Status - Application

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Application Highest Grade Completed: Associate Degree

Application Pursuing GED/Diploma/Certificate/Degree? No

Attending Alternative School? No

*Pell Grant Recipient?

Pell Grant Amount:

Attending School? No *Excluding Adult Education*

Full Time Attending School? No

High School Dropout? No

Based on a completed Basic Skills Screening

Tool, does the client meet Basic Skills No

Deficient Criteria?

Basic Skills Deficient? Yes

Youth In/Out School? N/A

Save

Cancel

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Making Corrections to IWDS Clients

On the Tests screens, the LSA can not make any changes to existing tests.

Changes to any other field on the Maintain Test screen or a request to delete a test record will require an IWDS Modification Request form.

Tests
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

	Category	Functional Area	Test	Level	Test Date	PY	EFL	GLE	SS	Gain
<input type="button" value="View"/>	Adult Basic Education-ABE	Reading	TABE 11-12	Difficult	03/01/2021	20	5	10	600	
<input type="button" value="View"/>	Adult Basic Education-ABE	Math	TABE 11-12	Medium	03/01/2021	20	3	5	525	

Skill Type	Date Skill Attained	PY	Comment
There is nothing to display.			

Maintain Test
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Test Date: 03/01/2021
Category: Adult Basic Education-ABE
Functional Area: Reading
Test: TABE 11-12
Test Level: Difficult *Required for Test TABE 11-12 only*
GLE: 10
Scale Score: 600
Functioning Level: 5-Low Adult Secondary Education-ABE
Comments:

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Making Corrections to IWDS Clients

On the Public Assistance screen, the LSA can only change the “Most Recent Date Referred to Other Federal/State Assistance” field.

Changes to any other field on this screen will require an IWDS Modification Request form.

Public Assistance
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Transitional Assistance: No
Refugee Help: No
SSI: No
SSDI: No
On Food Stamp: No
TANF: No
DHS Case #?:
Months Received TANF in Prior 60 months? 0

► **New WIOA Fields**
Long-Term Unemployed at Program Entry? No
Yes = Unemployed at or greater than 27 consecutive weeks
Exhausting TANF Within 2 Years? No
Yes = an individual has 36 or more months of TANF benefits used
Ticket to Work Holder? No
Employment and Training Services Related to SNAP? No
Most Recent Date Referred to Other Federal/State Assistance:

Making Corrections to IWDS Clients

On the Family Characteristics and List Family screens, the LSA cannot change any fields.

Any changes to this screen including adding or removing family members will require an IWDS Modification Request form.

Family Characteristics

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Family Type:Parent in one-parent family

Family Size:2

Dependant Less than 18:1

Family of 1 due to Disability:No

List Family

Cancel

List Family

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Family Size: 2

Dependant Under 18:1

Return

	First	Last	Relationship	Age	Dependent	Has Income
View	Giada	Fieri	Daughter	11 Years	Y	N
View	Bobbi	Fieri	Applicant	30 Years	N	Y

Return

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Income Calculation screen, the LSA cannot change any fields.

Any changes to this screen will require an IWDS Modification Request form.

Income Calculation

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Monthly	1	2	3	4	5	6	Row Total
Wages	\$4333.00	\$4333.00	\$4333.00	\$12533.00	\$0.00	\$0.00	\$25532.00
Self-Employed Wages							\$0.00
Pension							\$0.00
Insurance Annuity							\$0.00
Alimony							\$0.00
Other							\$0.00
UI Benefits							\$0.00
Total	\$4333.00	\$4333.00	\$4333.00	\$12533.00	\$0.00	\$0.00	\$25532.00

Monthly: \$4255.33

Annual:\$51064.00

Calculate Totals

Cancel

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Dislocated Worker Characteristics screen, the LSA can only change the “Displaced Homemaker” field and the 4 DWG Disaster fields.

Changes to any other field on this screen will require an IWDS Modification Request form.

Dislocated Worker Characteristics
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Requires additional assistance: Yes
Unemployed at least six months prior to application: No
Completed one month of job search: Yes
Displaced Homemaker:
Spouse of Active Duty Service Member: No
a. Employment loss due to relocation:
b. Unemployed, underemployed and is experiencing difficulty in obtaining or upgrading employment:

Client has no work history: No
Was client unemployed or underemployed for 10 non-consecutive weeks out of the last 26 weeks: Yes
In the last twenty-four months, client held, or is currently holding, a temporary or seasonal job: No
In the last twenty-four months, has client employment ended more than once: No

The following question is for Employment Recovery Only:
Department of Defense Contractor employee in a non-managerial position at risk of termination due to defense reductions resulting in Contractor's conversion of operations from defense to non-defense applications:

* Required and Allowed for DWG Disaster Only:
Received Physical:
Received Tetanus Shot:
Received Background Check:
Received Drug Screening:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the WIOA Training Criteria screen, the LSA can only change all of the fields.

WIOA Training Criteria
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

▶ WIOA Training Criteria

Assessment: Yes ▼

a. Assessment completed by: LWIA ▼

Initial IEP: Yes ▼

a. Initial IEP completed by: LWIA ▼

Meets Qualifications for Selected Training Program: Yes ▼

Selected Training Program is in Demand: Yes ▼

Other Grant Sources are Unavailable: Yes ▼

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Eligibility Determination screen, the LSA can add new Title/Program eligibility and certify it.

They can also delete previously certified Title/Program eligibility.

However, the LSA should be very careful to make sure any related services are deleted before deleting a certification.

Eligibility Determination

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1A - Adult Career Services	03/01/2021	03/01/2021
Documentation	Criteria	Yes	1A - Adult BSD Career Services	03/01/2021	03/01/2021

* Application Date: x

* Eligibility Determination Date:

Printable Application

Determine Eligibility >

Certification

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Title / Program(s): 1A - Adult Career Services

I have reviewed the eligibility criteria for this Title or Program, along with any required documents, and certify that the above named customer is eligible.

Date: 03/01/2021

Cancel Delete

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Contact Information screen, the LSA cannot change any fields.

Any changes to this screen will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Contact Information screen on the Customer Level.

Contact Information

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

First Name: Bobbi

Middle Initial:

Last Name: Fieri

Street Address: 500 E Monroe

Apt: 5C

City: Springfield

State: Illinois

Zip Code: 62701

County: Logan County

Home Phone:

Work Phone: **Ext:**

Cell Phone: (217)557-5559

Email Address: BF@dceo.org

Cancel

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Additional Contacts screen, the LSA can add new contacts and change any fields on an existing contact.

To remove a contact will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Additional Contacts screen on the Customer Level.

Additional Contacts
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

	Name	Relationship	Work Phone	Home Phone
<input type="button" value="View"/>	Flay, Guy	friend		(217)557-5558

Maintain Contact
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

*First Name:

Middle Initial:

*Last Name:

Relationship:

Street Address: Apt:

City:

State:

Zip Code:

*Phone Number:

Work Phone Number: Ext:

Email Address:

Comment:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Private Information screen, the LSA can change the “Race/Ethnicity”, “Individual with a Disability”, “Category of Disability”, and all of the New WIOA Fields.

Any changes to the other fields on this screen will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Private Information screen on the Customer Level.

Private Information
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Social Security Number: 366-22-0231
Hispanic or Latino? No
Race/Ethnicity: American Indian or Alaskan Native Asian
 Black Hawaiian or Pacific Island
 Prefer Not To Answer White

Gender: Female
Birth Date: 05/05/1990
Mother's Maiden Name: Drummond
Authorized to Work In USA: Yes
Selective Service Compliance: Not Applicable [Verify Compliance](#)
Selective Service Number:
Individual with a Disability? **Yes**
 Physical/Chronic Health Condition
 Physical/Mobility Impairment
 Mental or Psychiatric Disability

Category of Disability: Vision-related disability
 Hearing related disability
 Learning Disability
 Cognitive/Intellectual disability

▶ New WIOA Fields
Received services funded by the State Developmental Disabilities Agency (SDDA):
Received services funded by a local or state mental health agency (LSMHA):
Received services funded via a state Medicaid HCBS waiver:
Does the participant have a Section 504 plan: No
Does the participant have an Individualized Education Program/Special Education Service:
Type of Disability Work Setting:
Type of Customized Employment Services (CES) Received:
Type of Financial Services Received:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Veterans Information screen, the LSA cannot change any fields.

Any changes to the fields on this screen will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Veterans Information screen on the Customer Level.

Veterans Information
[Robbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Veteran or Qualified Spouse of a Veteran or Transitioning Service Member? No

An individual shall be considered a **U.S. Armed Forces Veteran** if they have served in the active military, naval, or air service, serving at least one day and were discharged or released from such service under conditions other than dishonorable. Active service includes full-time duty in the National Guard or a Reserve component, other than full-time duty for training purposes.

You are a **Qualified Spouse**, if you are the spouse of a veteran who has a 100% service-connected disability, who died from a service-connected disability or has been missing in action, has been captured or has been detained by a foreign power for more than 90 days.

You are a **Transitioning Service Member**, if you are an individual who is on active U. S. military status (including separation leave) and is within 24 months of retirement or 12 months of separation from military service.

Answer question below determined by the veterans or qualified spouse eligibility documentation.

Branch:	to
Dates of Service:	
Nature of Military Discharge:	
Armed Forces Campaign or Expeditionary Medal?	Expeditionary Medal
Service connected disability?	A Disabled Veteran has a service connected disability of 29% or less A Special Disabled Veteran has a service connected disability of 30% or greater

U.S. Citizen?

▶ **WIOA Fields for Veteran, Qualified Spouse or Transitioning Service Member**

Did the customer receive priority of service?

Veterans, Qualified Spouses and Transitioning Service Members are entitled to priority of service. Under the Jobs for Veterans Act, a "covered person" is entitled to priority of service under 20 DOL-funded workforce programs, including WIOA Title I Adult, Youth, and Dislocated Worker programs, statewide activity programs, National Emergency Grants (NEG), and the Trade Adjustment Assistance (TAA) program.

Did the customer attend a Transitional Assistance Program (TAP) in the last 3 years?

Has acceptable documentation been used and retained when Veteran, Qualified Spouse of a Veteran or Transitioning Service Member status is claimed? [Acceptable Documentation](#)

▶ **New WIOA Fields**

Most Recent Date received services from DVOP Specialist: Referred to Department of Veterans Affairs (VA) Services?

Date Referred to Department of Veterans Affairs (VA) Vocational Rehabilitation/Employment Program:

Referred to Jobs for Veterans State Grants (JVSG) Services?

Cancel

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the List Work History screen, the LSA cannot add any new records.

The LSA can click on any employer record to make changes on that record.

The exception is any job associated with WIOA Dislocated Worker eligibility criteria cannot be updated by the LSA at the application level. This will require a Request for IWDS Modification form submission to make any changes.

List Work History
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Return

1 found Page 1 of 1

Employer Name	Employment Dates	Dislocation Job?	DETS ID
Mel-O-Cream Donuts International, Inc.	12/01/2015 - 01/31/2021	Y	20210121002

Page 1 of 1

Return

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Edit Job screen, the LSA can change all of the fields.

To remove an employer, the LSA can click the DELETE button.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the List Work History screen on the Customer Level. The exception would be for any jobs associated with the DW Eligibility. Those changes will not transfer over since the job at the application level that had eligibility criteria is locked

Edit Job
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

DETS ID: 20210121002

TAA Petition: - [Verify TAA Petition Number](#)

*Employer Name:

*Employment Status:

*Start Date: End Date:

Job Title:

Street Address:

City:

State: Zip Code:

Contact Name:

Contact Phone: Extension:

Wages: Per:

*Hours Per Week:

Job Duties:

* Primary Occupation: Dislocation:

Self Employed: Family Member/Farmhand:

Layoff Reason:

Received Severance Pay:

Date Notified of Layoff:

Received Rapid Response Services:

Last Date Received Rapid Response Services:

Nafta Petition: - [Verify NAFTA Petition Number](#)

TAA Return to Work:

ATAA/RTAA Employment?:

*NAICS Code:

Description: Perishable Prepared Food Manufacturing

Declining: Y

*O*Net(SOC):

Description: FirstLine Supervisors of Food Preparation and Serving Workers

Low Growth?: Y

Making Corrections to IWDS Clients

On the Services screen, the LSA will need to click on the individual service record to see if they can make changes.

In this case, they will click on the Development of the IEP service.

Services
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
03/01/2021	03/01/2021	Development of an IEP - 1A	Successful Completion	Chris Daniels - career planner

Page 1 of 1

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On this service, the LSA can change the “Grant”, “Provider”, “Weekly Hours”, and “Comments” fields.

Any changes to the other fields on this screen will require an IWDS Modification Request form.

The LSA also has the option to delete this service with the “Delete Service” button.

Different services will have different fields open and closed.

Edit Required Activity Information

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Created By: Chris Daniels - career planner
Date Created: 03/12/2021
Last Updated By: Chris Daniels - career planner
Last Updated: 03/12/2021
Title: 1A
Service Level: Career Services
Activity: Development of an IEP **Same Day Service**
***Grant:**
Provider: *gingers-00 [Gingers Community College](#)
Start Date: 03/01/2021
End Date: 03/01/2021
Current Status: Successful Completion
***Weekly Hours:**
Comments:

Additional Info

Add Additional Episode

Save

Cancel

Delete Service

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the List Case Notes screen, the LSA will need to click on the individual case note they want to update.

The LSA cannot delete case notes. Any case notes that need deleted will require an IWDS Modification Request form.

List Case Notes
[Bobbi Fieri](#)
SSN: 0231

1 found Page 1 of 1

	Contact Date	Note Category	Program	Note Subject	Updated By	Created
View	03/01/2021	Case Note Supporting Same Day Service	WIOA	IEP	Chris Daniels - career planner	2021-03-12 17:18:32.456

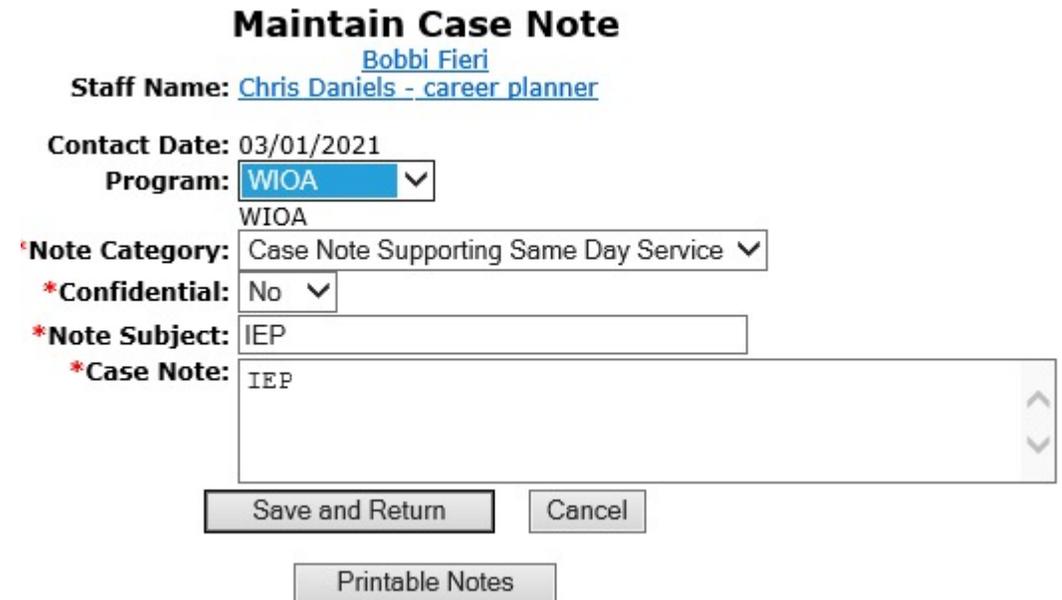
Page 1 of 1

Making Corrections to IWDS Clients

On the Maintain Case Notes screen, the LSA can edit the “Program”, “Note Category”, “Confidential”, “Note Subject”, and “Case Note” fields.

The LSA cannot change the “Staff Name” or “Contact Date”. If those fields need changed, the LSA will need to delete the record and re-enter the case note.

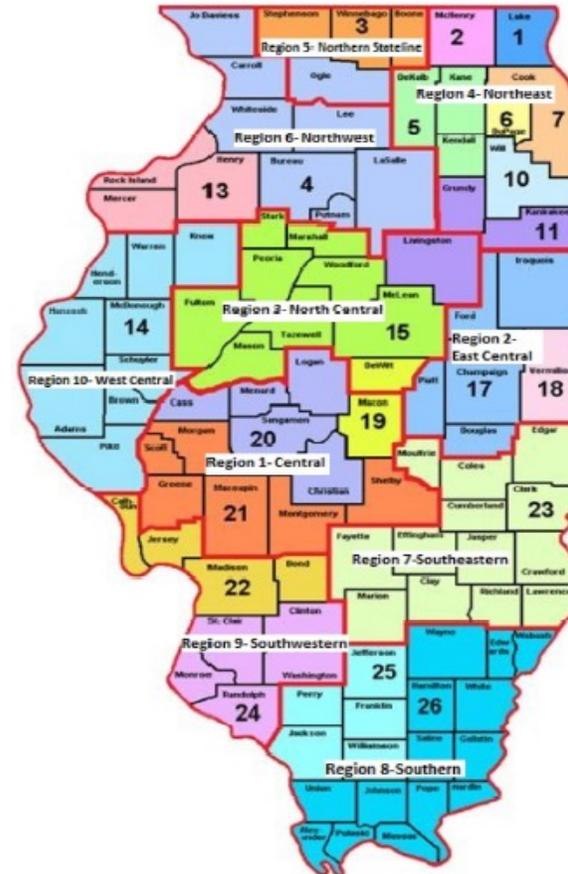
Any case notes that need deleted will require an IWDS Modification Request form.



Maintain Case Note
Staff Name: [Bobbi Fieri](#)
[Chris Daniels - career planner](#)
Contact Date: 03/01/2021
Program:
WIOA
*Note Category:
*Confidential:
*Note Subject:
*Case Note:

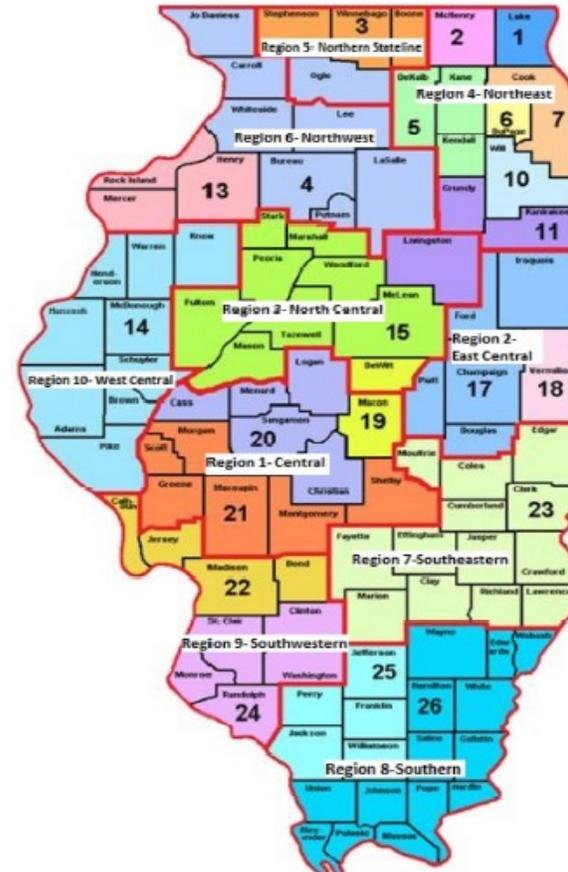
Submitting to Monitors for IWDS Modifications

When submitting to the OET Monitoring staff for IWDS modifications, the LWIAs are separated into 1 of 3 regions.



Submitting to Monitors for IWDS Modifications

- **Northern Region:** LWIA's 1, 2, 3, 5, 6, 7, 10, 11
- **Central Region:** LWIA's 4, 13, 14, 15, 17, 18, 19, 20, 21, 23
- **Southern Region:** LWIA's 22, 24, 25, 26



Local System Administrator Training - Editing IWDS Client Screens



Submitting to Monitors for IWDS Modifications

This is the current version of the IWDS Modification form. The LWIA can request a copy from the OET Monitoring staff.

The Local System Administrator will fill this out and email the form and supporting documentation for the modification to their assigned OET Monitoring staff member.

The OET Monitoring staff will review the request, and if approved, forward it to the IWDS Support staff to complete the modification.

WIOA/TAA REQUEST FOR MODIFICATION TO IWDS

REQUEST IDENTIFICATION:

LWIA Date of Request Compliance Monitor
Customer: Last Name First Name SSN (Last 4)
Application Data: Application Date Title(s) Case Manager

REQUEST DESCRIPTION & RATIONAL

SUPPORTING DOCUMENTATION (check all that apply and attach documentation):

Case note screen print Service activity screen print Grant information screen print
 Exit screen print Education status screen print TAA service or status screens
 Other Performance impact screen print

(To be completed by DCEO)

DCEO APPROVAL:

Program	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Staff: _____	
Reporting	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Staff: _____	
Performance	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____
Fiscal	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____
Trade	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____

FINAL RESOLUTION:

APPROVED DENIED Date: _____

Transferring Clients Between LWIAs

Sometimes, clients will have a reason to switch LWIAs. It could be a physical move or another valid reason.

To begin the process of transferring the client from one LWIA to another, the giving and receiving LWIA's have to agree to make the transfer. It needs to be understood that the gaining LWIA is accepting the client for Performance Outcomes and for any future monitoring or data validation that might occur with the client.

The receiving LWIA does not have to accept the transfer if they don't want to be responsible for the client, such as if the client would be a negative affect on their performance outcomes.

Transferring Clients Between LWIAs

Once all parties have agreed to the client transfer, the Local System Administrator for the LWIA (either the giving or receiving) sends an email to the IWDS System Administrators, with the Local System Administrator from the other LWIA cc'd on the email. The email will detail the customer's name, last 4 SSN, the Illinois WorkNet Center, and the name of the case manager who will be taking over the client in the receiving LWIA.

The receiving LWIA's Local System Administrator must either state in the original email or send a reply that they are accepting the transfer.

Once all of this has occurred, the IWDS System Administrators will submit the transfer to the programming staff, and they will notify the LWIAs when the transfer is completed.

Transferring Clients Between LWIAs

Finally, the receiving LWIA must receive the original hard copy files with all of the supporting documentation. Not copies. The original documents should follow the client to the new LWIA.

Sometimes the giving LWIA will choose to keep a copy of everything for themselves, since they expended grant money on the client.

Local System Administrator Training - Editing IWDS Client Screens



OET Contacts

IWDS SYSTEM ADMINISTATORS

Jim Potts: (217) 558-2456, james.potts@illinois.gov

Kris Theilen: (217) 557-5559, kristofer.theilen@illinois.gov

WIOA PERFORMANCE MEASURES STAFF

Mark Burgess: (217) 785-6387, mark.a.burgess@illinois.gov

Paula Barry: (217) 524-5500, paula.barry@illinois.gov

MONITORING STAFF SUPERVISORS

NORTHERN REGION – Kelly Lapetino: (773) 360-4628, kelly.lapetino@illinois.gov
CENTRAL REGION – Annamarie Dorr: (312) 636-1257, annamarie.dorr@illinois.gov
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Local System Administrator Training - Editing IWDS Client Screens



QUESTIONS?

The Illinois workNet® Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711. This workforce product was funded by a grant awarded by the U.S. Department of Labor Employment and Training Administration. For more information please refer to the footer at the bottom of any webpage at illinoisworknet.com. – December 2019, v3