

RECORDING ATTENDANCE

When **Bi-Weekly Attendance** is submitted the career planner will do the following:

Add Case Management Services as follows:

For participants covered by certifications numbered up to 97,999:

Trade Application:

Trade Application Entry (Add Additional Episode to Trade Case Management Service Record)

Click **List Enrolled Services** on the **Application Menu** on the **TAA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". Below this is a "Printable Application" button. The menu is divided into three columns: "Application" (with links like Guided Application, Application Definition, Assessment Summary, TAA Training Criteria, TAA Additional Info, Concurrent Programs, Characteristics and Barriers, Employment Characteristics, Education Status, Tests, Public Assistance, Family Characteristics, Income Calculation, Dislocated Worker Characteristics, LWA Specific Data, Eligibility Determination, List TAA Status, and List IDES View), "Profile" (with links like Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents, and Create TAA Template), and "Services" (with links like List Enrolled Services and List Part Time/Distance Learning). The "List Enrolled Services" link is highlighted with a red box. At the bottom right, there is an "Exit" section with links for Exit Summary, View Wages, and View TAA Costs.

Click on Trade Case Management – TAA.

**IWDS** Illinois Workforce Development System **Case Management**

Services

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	10/25/2020	Trade Case Management - TAA	successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

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Click **Add Additional Episode**.

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Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
Date Created: 10/29/2020
Last Updated By: Sheila Sloan
Last Updated: 10/29/2021
Approved/Denied By:
Approved/Denied Date:
Title: TAA
Service Level: Employment and Case Management
Activity: Trade Case Management **Same Day Service**
***Grant:** 17661015-United Workforce Development Board aka Career Link
Provider: *1502-00 Carl Sandburg College
Start Date: 10/25/2020
End Date: 10/25/2020
Current Status: Successful Completion
***Weekly Hours:** 10.0
*** Bridge Program Activity?:** No
Comments:
TAA Services Completed: *Click Confirm when all TAA Services have been completed*

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **TAA/NAFTA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a case note based on the following:

Attendance Received with No Absences:

Case Note Subject: Bi-Weekly Attendance Received with no absences (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). No absences noted.

Received Attendance for Finals Weeks:

Case Note Subject: Bi-Weekly Attendance Received with absences for Finals weeks (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). Participant missed classes on (enter dates of finals weeks) due to finals weeks.

***Received Attendance with Absences for Failure to attend all training class(es) and/or other training activities scheduled by the training institution:**

Case Note Subject: Bi-Weekly attendance received for (enter the two-week period dates) with absences.

Case Note: Bi-Weekly attendance received for (enter two-week period dates). Participant missed classes on (enter dates of missed classes) for (enter reason for missed classes). A ceased participation has been entered for the missed class(es).

Received Attendance with Absences for Instructor Cancelled Class(es)/Training Institution Scheduled Breaks/Weather Days/Campus Closure:

Case Note Subject: Bi-Weekly Attendance Received with absences (enter reason for the cancelled class) (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). Classes were cancelled on (enter dates of cancelled classes) due to (enter reason for cancelled classes).

Failed to provide verification of attendance or verification is incomplete:

Case Note Subject: Bi-Weekly attendance Not Received or Incomplete (enter two-week period dates).

Case Note: Bi-Weekly attendance was not received or is incomplete for (enter two-week period dates). A ceased participation has been entered.

Click **Save and Return**.

The screenshot displays the IWDS Case Management interface. At the top, a red banner contains the IWDS logo and the text "Illinois Workforce Development System Case Management". On the left, a blue sidebar menu lists various options: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), "FAQs", and "I'm Done: Log Off". The main content area features a yellow informational message: "Informational Message: A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen." Below this message is the "Add Case Note" form. The form includes the following fields: "Staff Name" (Sheila Sloan), "Contact Date" (11/01/2021), "Program" (TAA/NAFTA), "Note Category" (Case Note Supporting Same Day Service), "Confidential" (No), "Note Subject" (Case Management Services), and "Case Note" (Provided Case Management Service to participant.). A "Save and Return" button is located at the bottom of the form.

NOTE: The End Date for the Trade Case Management – TAA Service Record has updated with the current date of the entry that was just made.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this, the user's name "Steve Perry" and "Application Summary" are displayed, along with "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

On the left side, there is a blue sidebar menu with the following items: "Menu", "Staff Menu", "Customer Menu", "Application Menu", "Case Notes", "Add Case Notes", "List Case Notes", "Universal Services", "Add Local Service", "List All Services", "AQs", and "Form Done: Log Off".

The main content area shows a table with 3 found services. The table has the following columns: Start Date, End Date, Service Provided, Status, and Created By. The first row is highlighted in yellow and has a red box around the End Date "11/01/2021".

Start Date	End Date	Service Provided	Status	Created By
10/25/2020	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

Below the table, there are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

WIOA Application: No entry.

For those participants covered by certifications numbered 98,000+ (2021R):

Trade Application: No entry.

WIOA Application:

WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).

Click **List Enrolled Services** on the **Application Menu** on the **WIOA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. Below this are three columns of links: "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), and "Services" (List Enrolled Services, ITA Characteristics, List Part Time/Distance Learning). The "Services" section is highlighted with a red box. At the bottom right, there is an "Exit" section with links for Exit Summary, View Wages, and Performance Impact.

Click on **Career Planning (Case Management) – 1DC**.



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Services

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

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Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	Career Planning (Case Management) - IDC	Successful Completion	Sheila Sloan

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Click **Add Additional Episode**.



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Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
 Date Created: 11/01/2021
 Last Updated By: Sheila Sloan
 Last Updated: 11/01/2021
 Title: IDC
 Service Level: Career Services
 Activity: Career Planning (Case Management) **Same Day Service**
 *Grant:
 Provider: *[1537-00 Bradley University](#)
 Start Date: 11/01/2021
 End Date: 11/01/2021
 Current Status: Successful Completion
 Comments:

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **WIOA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a case note based on the following:

Attendance Received with No Absences:

Case Note Subject: Bi-Weekly Attendance Received with no absences (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). No absences noted.

Received Attendance for Finals Weeks:

Case Note Subject: Bi-Weekly Attendance Received with absences for Finals weeks (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). Participant missed classes on (enter dates of finals weeks) due to finals weeks.

Received Attendance with Absences for Failure to attend all training class(es) and/or other training activities scheduled by the training institution:

Case Note Subject: Bi-Weekly attendance received for (enter the two-week period dates) with absences.

Case Note: Bi-Weekly attendance received for (enter two-week period dates). Participant missed classes on (enter dates of missed classes) for (enter reason for missed classes). A ceased participation has been entered for the missed class(es).

Received Attendance with Absences for Instructor Cancelled Class(es)/Training Institution Scheduled Breaks/Weather Days/Campus Closure:

Case Note Subject: Bi-Weekly Attendance Received with absences (enter reason for the cancelled class) (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). Classes were cancelled on (enter dates of cancelled classes) due to (enter reason for cancelled classes).

Failed to provide verification of attendance or verification is incomplete:

Case Note Subject: Bi-Weekly attendance Not Received or Incomplete (enter two-week period dates).

Case Note: Bi-Weekly attendance was not received or is incomplete for (enter two-week period dates). A ceased participation has been entered.

Click **Save and Return**.

 **IWDS** Illinois Workforce Development System **Case Management**

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Informational Message:
A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

Add Case Note

[Steve Perry](#) [Application Summary](#)

Staff Name: [Sheila Sloan](#)

*Contact Date:

Program: ▼

*Note Category: ▼

*Confidential: ▼

*Note Subject:

*Case Note:

December 16, 2021

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Recording Attendance Instructions

Additional Steps for Received Attendance with Absences for Failure to attend all training class(es) and/or other training activities scheduled by the training institution.

If attendance is submitted with absences for failure to attend all training class(es), the career planner must also complete the following steps:

Enter a **Ceased Participation Status Record** with the reason “Failed to attend all training class(es) and/or other training activity scheduled by the Training Institution”.

Click **List TAA Status** from the **Application Menu** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. The menu is organized into three columns: "Application" (with 16 items, where "List TAA Status" is highlighted with a red box), "Profile" (with 8 items), and "Services" (with 2 items). An "Exit" section at the bottom right contains 3 items.

Click Add TAA Status

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List TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

Add TAA Status Return

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
View	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
View	12/01/2021		In Training		Sheila Sloan	12/10/2021
View	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
View	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
View	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

Add TAA Status Return

Select **Ceased Participation in Training** from the drop down for **Status**.

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Maintain TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

TAA Petition Number: 90900 **TAA Act:** 2015
Employer Name: Caterpillar

Status:	<input type="text" value="Enrolled in Training - Not Yet Started"/>
Status Start Date:	<input type="text" value="Vacation Break"/>
Status End Date:	<input type="text" value="Waiver from Training Requirement"/>
Waiver Reason:	<input type="text" value="Waiver Revoked"/>
Suspension Request Reason:	<input type="text" value="Potential Suspension Request"/>
Ceased Participation Reason:	<input type="text" value="Ceased Participation in Training"/>
Comments:	<input type="text" value="IEP"/>
IEP Amount Approved:	<input type="text" value="Returned to Work"/>
Revocation Reason:	<input type="text"/>
TAA Return to work Part Time:	<input type="text"/>
Qualifies Under 45 Day Extension:	<input type="text"/>
Qualifies Under 60 Day Extension:	<input type="text"/>
Qualifies Under Federal Good Cause Provision:	<input type="text"/>
Qualifies Under Equitable Tolling:	<input type="text"/>

Enter the **Status Start Date** – this is the first date of absence.
 Enter the **Status End Date** – This is the last date of absence.
 NOTE: For a single day of absence, enter the same date for both.

Select the **Failed to Attend all Training Class(es) or other Training Activity Scheduled** from the drop down for **Ceased Participation Reason**.

Enter a dated comment in the **Comment Box** describing the dates of absence and the reason for the absence.


IWDS Illinois Workforce Development System Case Management

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Maintain TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 **App LWA:** 15 **App Date:** 02/13/2019

TAA Petition Number: 90900 **TAA Act:** 2015
Employer Name: Caterpillar

Status:

Status Start Date:

Status End Date:

Waiver Reason:

Suspension Request Reason:

Ceased Participation Reason:

Comments:

IEP Amount Approved:

Revocation Reason:

TAA Return to work Part Time:

Qualifies Under 45 Day Extension:

Qualifies Under 60 Day Extension:

Qualifies Under Federal Good Cause Provision:

Qualifies Under Equitable Tolling:

Additional Steps for Failure to provide attendance or incomplete:

The career planner must contact the participant to obtain missing/revised **Bi-Weekly Attendance** and record all attempts to obtain in **Case Notes**.

Enter a **Ceased Participation Status Record** with the reason "Failed to attend all training class(es) and/or other training activity scheduled by the Training Institution".

Click **List TAA Status** from the **Application Menu** for the participant.



The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header, the user's name "Steve Perry" and "Application Summary" are displayed. The user's SSN is 0503, the application LWA is 15, and the application date is 02/13/2019. A "Printable Application" button is visible. The main content area is divided into three columns: Application, Profile, and Services. The Application column lists various options, with "List TAA Status" highlighted in a red box. The Profile column lists options like Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents, and Create TAA Template. The Services column lists List Enrolled Services and List Part Time/Distance Learning. The Exit column lists Exit Summary, View Wages, and View TAA Costs. A left sidebar contains navigation menus for Staff, Customer, Case Notes, Universal Services, and FAQs.

Case Management

Application Menu

Steve Perry Application Summary

SSN: 0503 App LWA:15 App Date:02/13/2019

Printable Application

Application

- Guided Application
- Application Definition
- Assessment Summary
- TAA Training Criteria
- TAA Additional Info
- Concurrent Programs
- Characteristics and Barriers
- Employment
- Characteristics
- Education Status
- Tests
- Public Assistance
- Family Characteristics
- Income Calculation
- Dislocated Worker Characteristics
- LWA Specific Data
- Eligibility Determination
- List TAA Status
- List IDES View

Profile

- Contact Information
- Additional Contacts
- Private Information
- Veterans Information
- Employment History
- Credentials
- Education Status - In Program Update
- Measurable Skill Gains
- List All Documents
- Create TAA Template

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

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Click Add TAA Status

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List TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

Add TAA Status Return

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
View	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
View	12/01/2021		In Training		Sheila Sloan	12/10/2021
View	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
View	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
View	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

Add TAA Status Return

Select **Ceased Participation in Training** from the drop down for **Status**.

 **IWDS** Illinois Workforce Development System **Case Management**

Maintain TAA Status
[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

TAA Petition Number: 90900 TAA Act: 2015
Employer Name: Caterpillar

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Status:
Status Start Date:
Status End Date:
Waiver Reason:
Suspension Request Reason:
Ceased Participation Reason:
Comments:
IEP Amount Approved:
Revocation Reason:
TAA Return to work Part Time:
Qualifies Under 45 Day Extension:
Qualifies Under 60 Day Extension:
Qualifies Under Federal Good Cause Provision:
Qualifies Under Equitable Tolling:

Enter the **Status Start Date** – this is the first date of the two week period for the missing (or incomplete) bi-weekly attendance sheet.

Enter the **Status End Date** – This is the last date of the two week period for the missing (or incomplete) bi-weekly attendance sheet.

NOTE: Two-week period must be Sunday to Saturday.

Select the **Failed to provided verification of attendance** from the drop down for **Ceased Participation Reason**.

Enter a dated comment in the **Comment Box** describing the dates of absence and the reason for the absence.

Comment for missing attendance: (Date) – Participant failed to turn in Bi-Weekly attendance for the period of 11/28/2021 through 12/11/2021.

Comment for incomplete attendance: (Date) – Bi-weekly attendance for period of 11/28/2021 through 12/11/2021 was incomplete due to (give information on missing information on form).

 **IWDS** Illinois Workforce Development System **Case Management**

Maintain TAA Status
[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

TAA Petition Number: 90900 TAA Act: 2015
Employer Name: Caterpillar

Status:

Status Start Date:

Status End Date:

Waiver Reason:

Suspension Request Reason:

Ceased Participation Reason:

Comments:

IEP Amount Approved:

Revocation Reason:

TAA Return to work Part Time:

Qualifies Under 45 Day Extension:

Qualifies Under 60 Day Extension:

Qualifies Under Federal Good Cause Provision:

Qualifies Under Equitable Tolling:

Steps to take when missing/corrected Bi-Weekly Attendance is received

When the missing/corrected **Bi-Weekly Attendance** are received, the career planner will review to ensure they are complete and correct.

If the attendance sheets are incomplete or indicate absences, follow the instructions above for the appropriate scenario.

If the attendance sheets are complete and correct, the career planner will do the following:

Add Case Management Services as follows:

For participants covered by certifications numbered up to 97,999:

Trade Application:

Trade Application Entry (Add Additional Episode to Trade Case Management Service Record)

Click **List Enrolled Services** on the **Application Menu** on the **TAA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done, Log Off). The main content area is titled "Application Menu" and displays "Steve Perry Application Summary" with "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". A "Printable Application" button is visible. Below are three columns of links: "Application" (Guided Application, Application Definition, Assessment Summary, TAA Training Criteria, TAA Additional Info, Concurrent Programs, Characteristics and Barriers, Employment, Characteristics, Education Status, Tests, Public Assistance, Family Characteristics, Income Calculation, Dislocated Worker Characteristics, LWA Specific Data, Eligibility Determination, List TAA Status, List IDES View), "Profile" (Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents, Create TAA Template), and "Services" (List Enrolled Services, List Part Time/Distance Learning). The "List Enrolled Services" link is highlighted with a red box. An "Exit" section contains links for Exit Summary, View Wages, and View TAA Costs.

Click on Trade Case Management – TAA.

**IWDS** Illinois Workforce Development System **Case Management**

Services

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	10/25/2020	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

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Click **Add Additional Episode**.

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Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
Date Created: 10/29/2020
Last Updated By: Sheila Sloan
Last Updated: 10/29/2021
Approved/Denied By:
Approved/Denied Date:
Title: TAA
Service Level: Employment and Case Management
Activity: Trade Case Management **Same Day Service**
***Grant:** 17661015-United Workforce Development Board aka Career Link
Provider: *1502-00 Carl Sandburg College
Start Date: 10/25/2020
End Date: 10/25/2020
Current Status: Successful Completion
***Weekly Hours:** 10.0
*** Bridge Program Activity?:** No
Comments:
TAA Services Completed: *Click Confirm when all TAA Services have been completed*

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **TAA/NAFTA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a case note based on the following:

Attendance Received with No Absences:

Case Note Subject: Bi-Weekly Attendance Received with no absences (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). No absences noted.

***Received Attendance with Absences for Failure to attend all training class(es) and/or other training activities scheduled by the training institution:**

Case Note Subject: Bi-Weekly attendance received for (enter the two-week period dates) with absences.

Case Note: Bi-Weekly attendance received for (enter two-week period dates). Participant missed classes on (enter dates of missed classes) for (enter reason for missed classes). A ceased participation has been entered for the missed class(es).

Received Attendance with Absences for Instructor Cancelled Class(es)/Training Institution Scheduled Breaks/Weather Days/Campus Closure:

Case Note Subject: Bi-Weekly Attendance Received with absences (enter reason for the cancelled class) (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). Classes were cancelled on (enter dates of cancelled classes) due to (enter reason for cancelled classes).

Verification of attendance is incomplete:

Case Note Subject: Bi-Weekly attendance Not Received or Incomplete (enter two-week period dates).

Case Note: Bi-Weekly attendance was not received or is incomplete for (enter two-week period dates). A ceased participation has been entered.

Click **Save and Return**.

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- [I'm Done: Log Off](#)

Informational Message:
A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

Add Case Note

[Steve Perry](#) [Application Summary](#)

Staff Name: [Sheila Sloan](#)

*Contact Date:

Program:

*Note Category:

*Confidential:

*Note Subject:

*Case Note:

NOTE: The End Date for the Trade Case Management – TAA Service Record has updated with the current date of the entry that was just made.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this, the user's name "Steve Perry" and "Application Summary" are displayed, along with "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

On the left side, there is a blue sidebar menu with the following items: "Menu", "Staff Menu", "Customer Menu", "Application Menu", "Case Notes", "Add Case Notes", "List Case Notes", "Universal Services", "Add Local Service", "List All Services", "AQs", and "Form Done: Log Off".

The main content area shows a table with 3 rows and 5 columns. The table is titled "3 found" and "Page 1 of 1". The columns are "Start Date", "End Date", "Service Provided", "Status", and "Created By". The first row has "10/25/2020" for Start Date, "11/01/2021" for End Date (highlighted with a red box), "Trade Case Management - TAA" for Service Provided, "Successful Completion" for Status, and "Sheila Sloan" for Created By. The second row has "02/13/2019" for Start Date, an empty End Date, "Individual Employment Plan - TAA" for Service Provided, "Open" for Status, and "Sheila Sloan" for Created By. The third row has "02/13/2019" for Start Date, "04/14/2019" for End Date, "Issued Waiver - TAA" for Service Provided, "Successful Completion" for Status, and "Sheila Sloan" for Created By.

Below the table, there is another "Page 1 of 1" indicator and the same three buttons: "Add Enrolled Service", "Printable Services", and "Return".

WIOA Application: No entry.

For those participants covered by certifications numbered 98,000+ (2021R):

Trade Application: No entry.

WIOA Application:

WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).

Click **List Enrolled Services** on the **Application Menu** on the **WIOA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. Below the user info are three columns of links: "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), and "Services" (List Enrolled Services, ITA Characteristics, List Part Time/Distance Learning). The "Services" section is highlighted with a red box. At the bottom right, there is an "Exit" section with links for Exit Summary, View Wages, and Performance Impact.

Click on **Career Planning (Case Management) – 1DC.**



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Services

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	Career Planning (Case Management) - IDC	Successful Completion	Sheila Sloan

Page 1 of 1

Click **Add Additional Episode**.



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Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
 Date Created: 11/01/2021
 Last Updated By: Sheila Sloan
 Last Updated: 11/01/2021
 Title: IDC
 Service Level: Career Services
 Activity: Career Planning (Case Management) **Same Day Service**
 *Grant:
 Provider: *1537-00 Bradley University
 Start Date: 11/01/2021
 End Date: 11/01/2021
 Current Status: Successful Completion
 Comments:

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **WIOA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a case note based on the following:

Attendance Received with No Absences:

Case Note Subject: Bi-Weekly Attendance Received with no absences (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). No absences noted.

***Received Attendance with Absences for Failure to attend all training class(es) and/or other training activities scheduled by the training institution:**

Case Note Subject: Bi-Weekly attendance received for (enter the two-week period dates) with absences.

Case Note: Bi-Weekly attendance received for (enter two-week period dates). Participant missed classes on (enter dates of missed classes) for (enter reason for missed classes). A ceased participation has been entered for the missed class(es).

Received Attendance with Absences for Instructor Cancelled Class(es)/Training Institution Scheduled Breaks/Weather Days/Campus Closure:

Case Note Subject: Bi-Weekly Attendance Received with absences (enter reason for the cancelled class) (enter two-week period dates).

Case Note: Bi-weekly attendance received for (enter two-week period dates). Classes were cancelled on (enter dates of cancelled classes) due to (enter reason for cancelled classes).

Verification of attendance is incomplete:

Case Note Subject: Bi-Weekly attendance Not Received or Incomplete (enter two-week period dates).

Case Note: Bi-Weekly attendance was not received or is incomplete for (enter two-week period dates). A ceased participation has been entered.

Click **Save and Return**.



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- [Staff Menu](#)
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Case Notes

- [Add Case Notes](#)
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Universal Services

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FAQs

[I'm Done: Log Off](#)

Informational Message:

A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

Add Case Note

[Steve Perry](#) [Application Summary](#)

Staff Name: [Sheila Sloan](#)

*Contact Date:

Program:

*Note Category:

*Confidential:

*Note Subject:

*Case Note:

Update the **Ceased Participation Status Record Comment Box** to indicate the missing attendance sheets were received and the date they were received.

Click **List TAA Status** on the **Application Menu** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu on the left with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503 App LWA:15 App Date:02/13/2019", and a "Printable Application" button. Below this are three columns of links: "Application" (including Guided Application, Application Definition, Assessment Summary, TAA Training Criteria, TAA Additional Info, Concurrent Programs, Characteristics and Barriers, Employment Characteristics, Education Status, Tests, Public Assistance, Family Characteristics, Income Calculation, Dislocated Worker Characteristics, LWA Specific Data, Eligibility Determination, List TAA Status, and List IDES View), "Profile" (including Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents, and Create TAA Template), and "Services" (including List Enrolled Services and List Part Time/Distance Learning). An "Exit" section contains links for Exit Summary, View Wages, and View TAA Costs. The "List TAA Status" link in the Application column is highlighted with a red box.

Click **View** beside the **Ceased Participation in Training Status Record** that you are updating.



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Informational Message:
Update Successful

List TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 **App LWA:**15 **App Date:**02/13/2019

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		Sheila Sloan	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

Enter a dated comment in the **Comment Box** providing the date when the attendance was received. NOTE: This comment should be placed above the previous comment.

Click **Save**.



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Case Notes

[Add Case Notes](#)
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Universal Services

[Add Local Service](#)
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FAQs

[I'm Done: Log Off](#)

Maintain TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 **App LWA:**15 **App Date:**02/13/2019

TAA Petition Number: 90900 **TAA Act:** 2015
Employer Name: Caterpillar

Status: Ceased Participation in Training
Entry Date: 12/15/2021
Status Start Date: 12/01/2021
Status End Date:

Ceased Participation Reason: Failed to provide verification of attendance

Comments:

Created By: Sheila Sloan **Date Created:** 12/15/2021
Last Updated By: Sheila Sloan **Date Last Updated:** 12/15/2021

Career Planner Follow-up to IDES Adjudication of Ceased Participation

Ceased Participation Status Records are adjudicated by IDES. The career planner will need to work with IDES to obtain a determination on the Ceased Participant Status entered.

For both an affirmation (participant did cease participation) or denial (participant did not cease participation) of the **Ceased Participation**, the career planner will do the following:

Update the **Ceased Participation Status Record** with a dated comment detailing the outcome from the IDES adjudication in the **Comment Box** and enter a **Status End Date** (date of IDES determination).

Click **List TAA Status** on the **Application Menu** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". A "Printable Application" button is visible. The menu is organized into four columns: "Application" (with 16 items, where "List TAA Status" is highlighted with a red box), "Profile" (with 8 items), "Services" (with 2 items), and "Exit" (with 3 items).

Case Management

Application Menu

Steve Perry Application Summary

SSN: 0503 App LWA:15 App Date:02/13/2019

Printable Application

Application

- Guided Application
- Application Definition
- Assessment Summary
- TAA Training Criteria
- TAA Additional Info
- Concurrent Programs
- Characteristics and Barriers
- Employment Characteristics
- Education Status
- Tests
- Public Assistance
- Family Characteristics
- Income Calculation
- Dislocated Worker Characteristics
- LWA Specific Data
- Eligibility Determination
- List TAA Status
- List IDES View

Profile

- Contact Information
- Additional Contacts
- Private Information
- Veterans Information
- Employment History
- Credentials
- Education Status - In Program Update
- Measurable Skill Gains
- List All Documents
- Create TAA Template

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click **View** beside the **Ceased Participation in Training Status Record** that you are updating.



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Case Notes

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

Universal Services

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

FAQs

[I'm Done: Log Off](#)

Informational Message:
Update Successful

List TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 **App LWA:**15 **App Date:**02/13/2019

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/06/2021		Returned to Work		Sheila Sloan	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		Sheila Sloan	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	Sheila Sloan	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	Sheila Sloan	11/30/2021

Enter a dated comment in the **Comment Box** providing the date when the attendance was received. NOTE: This comment should be placed above the previous comment.

Click **Save**.



Menus

[Staff Menu](#)
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Case Notes

[Add Case Notes](#)
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Universal Services

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FAQs

[I'm Done: Log Off](#)

Maintain TAA Status

[Steve Perry](#) [Application Summary](#)
SSN: 0503 **App LWA:**15 **App Date:**02/13/2019

TAA Petition Number: 90900 **TAA Act:** 2015
Employer Name: Caterpillar

Status: Ceased Participation in Training
Entry Date: 12/15/2021
Status Start Date: 12/01/2021
Status End Date:

Ceased Participation Reason: Failed to provide verification of attendance

Comments:

12/15/2021 - Attendance received for period 12/1/2021 to 12/11/21.

12/15/2021 - Participant failed to turn in bi-

Created By: Sheila Sloan **Date Created:** 12/15/2021
Last Updated By: Sheila Sloan **Date Last Updated:** 12/15/2021

Add Case Management Services as follows:

For participants covered by certifications numbered up to 97,999:

Trade Application:

Trade Application Entry (Add Additional Episode to Trade Case Management Service Record)

Click **List Enrolled Services** on the **Application Menu** on the **TAA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu with sections: "Menus" (Staff Menu, Customer Menu, Application Menu), "Case Notes" (Add Case Notes, List Case Notes), "Universal Services" (Add Local Service, List All Services), and "FAQs" (I'm Done: Log Off). The main content area is titled "Application Menu" and displays user information: "Steve Perry", "Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. Below this are three columns of links: "Application" (Guided Application, Application Definition, Assessment Summary, TAA Training Criteria, TAA Additional Info, Concurrent Programs, Characteristics and Barriers, Employment, Characteristics, Education Status, Tests, Public Assistance, Family Characteristics, Income Calculation, Dislocated Worker Characteristics, LWA Specific Data, Eligibility Determination, List TAA Status, List IDES View), "Profile" (Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents, Create TAA Template), and "Services" (List Enrolled Services, List Part Time/Distance Learning). The "List Enrolled Services" link is highlighted with a red box. An "Exit" section contains links for Exit Summary, View Wages, and View TAA Costs.

Click on Trade Case Management – TAA.

**IWDS** Illinois Workforce Development System **Case Management**

Services

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	10/25/2020	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

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Click **Add Additional Episode**.

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Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)

SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
Date Created: 10/29/2020
Last Updated By: Sheila Sloan
Last Updated: 10/29/2021
Approved/Denied By:
Approved/Denied Date:
Title: TAA
Service Level: Employment and Case Management
Activity: Trade Case Management **Same Day Service**
***Grant:** 17661015-United Workforce Development Board aka Career Link
Provider: *1502-00 Carl Sandburg College
Start Date: 10/25/2020
End Date: 10/25/2020
Current Status: Successful Completion
***Weekly Hours:** 10.0
*** Bridge Program Activity?:** No
Comments:
TAA Services Completed: *Click Confirm when all TAA Services have been completed*

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **TAA/NAFTA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a case note detailing the IDES outcome.

Click **Save and Return**.

The screenshot shows the IWDS (Illinois Workforce Development System) Case Management interface. On the left is a blue navigation menu with links for Staff Menu, Customer Menu, Application Menu, Case Notes, Universal Services, and FAQs. The main content area has a yellow informational message about Case Notes. Below that is the 'Add Case Note' form for staff member Steve Perry, showing details for Sheila Sloan. The form includes fields for Contact Date (11/01/2021), Program (TAA/NAFTA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management Services), and a Case Note text area containing 'Provided Case Management Service to participant.'. A 'Save and Return' button is at the bottom.

Informational Message:
A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

Add Case Note
[Steve Perry](#) [Application Summary](#)
Staff Name: [Sheila Sloan](#)

*Contact Date: 11/01/2021
Program: TAA/NAFTA ▾
*Note Category: Case Note Supporting Same Day Service ▾
*Confidential: No ▾
*Note Subject: Case Management Services
*Case Note: Provided Case Management Service to participant.

Save and Return

NOTE: The End Date for the Trade Case Management – TAA Service Record has updated with the current date of the entry that was just made.

Services
[Steve Perry](#) [Application Summary](#)
 SSN: 0503 App LWA:15 App Date:02/13/2019

Add Enrolled Service Printable Services Return

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
02/13/2019		Individual Employment Plan - TAA	Open	Sheila Sloan
02/13/2019	04/14/2019	Issued Waiver - TAA	Successful Completion	Sheila Sloan

Page 1 of 1

Add Enrolled Service Printable Services Return

WIOA Application: No entry.

For those participants covered by certifications numbered 98,000+ (2021R):

Trade Application: No entry.

WIOA Application:

WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).

Click **List Enrolled Services** on the **Application Menu** on the **WIOA Application** for the participant.

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu with options like "Staff Menu", "Customer Menu", "Application Menu", "Case Notes", "Universal Services", and "FAQs". The main content area is titled "Application Menu" and displays user information: "Steve Perry", "Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There is a "Printable Application" button. Below this are three columns of links: "Application" (e.g., Guided Application, Application Definition), "Profile" (e.g., Contact Information, Additional Contacts), and "Services" (e.g., List Enrolled Services, ITA Characteristics). The "Services" column is highlighted with a red box.

Click on **Career Planning (Case Management) – 1DC**.

The screenshot shows the "Services" page in the IWDS Case Management system. It features the same red header and blue sidebar as the previous screenshot. The main content area is titled "Services" and shows user information: "Steve Perry", "Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There are buttons for "Add Enrolled Service", "Printable Services", and "Return". Below this is a table with the following data:

Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	Career Planning (Case Management) - 1DC	Successful Completion	Sheila Sloan

The table indicates "1 found" and "Page 1 of 1". At the bottom, there are buttons for "Add Enrolled Service", "Printable Services", and "Return".

Click **Add Additional Episode**.

 **IWDS** Illinois Workforce Development System **Case Management**

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FAQs
[I'm Done: Log Off](#)

Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
Date Created: 11/01/2021
Last Updated By: Sheila Sloan
Last Updated: 11/01/2021
Title: IDC
Service Level: Career Services
Activity: Career Planning (Case Management) **Same Day Service**
***Grant:** 19681015-United Workforce Development Board aka Career Link ▾
Provider: *1537-00 Bradley University
Start Date: 11/01/2021
End Date: 11/01/2021
Current Status: Successful Completion
Comments: 11/1/2021 - Add Dated Comment

[Additional Info](#)
Add Additional Episode

[Save](#) [Cancel](#)

[Delete Service](#)

Complete the following fields:

Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

Program – Select **WIOA** from the drop down list.

Note Category – Select the appropriate entry from the drop down list.

Confidential – Select **Yes** or **No** to indicate if the case note is confidential.

Note Subject – Enter a subject for the case note that describes what service is being provided.

Case Note – Enter a case note detailing the IDES outcome.

Click **Save and Return**.

The screenshot shows the IWDS (Illinois Workforce Development System) Case Management interface. At the top is a red header with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with options: 'Menus' (Staff Menu, Customer Menu, Application Menu), 'Case Notes' (Add Case Notes, List Case Notes), 'Universal Services' (Add Local Service, List All Services), and 'FAQs' (I'm Done: Log Off). The main content area has a yellow informational message box stating: 'Informational Message: A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.' Below the message is the 'Add Case Note' form. The form includes: 'Staff Name: Steve Perry Application Summary Sheila Sloan'; '*Contact Date: 11/01/2021'; 'Program: WIOA'; '*Note Category: Case Note Supporting Same Day Service'; '*Confidential: No'; '*Note Subject: Case Management'; and '*Case Note: 11/1/21 Case Management for participant'. A 'Save and Return' button is at the bottom of the form.

If the outcome affects the training plan, an **IEP Modification** will also be required.