

## RECORDING BENCHMARKS

To enter benchmarks:

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

The screenshot shows the IWDS Case Management interface. At the top, a red banner contains 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". A "Printable Application" button is visible. The menu is organized into four columns: "Application" (with "List TAA Status" highlighted in a red box), "Profile", "Services", and "Exit".

**Application Menu**  
Steve Perry Application Summary  
SSN: 0503 App LWA:15 App Date:02/13/2019  
Printable Application

**Application**

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**Profile**

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**Services**

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

**Exit**

- [Exit Summary](#)
- [View Wages](#)
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Click **View** beside the In Training Status Record.

IWDS Illinois Workforce Development System Case Management

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### 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		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

Click **60 Day Review**.

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

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**Status:** In Training  
**Enrolled in Remedial:** Y  
**Part Time Training:** No  
**PT/FT Training Date:** 12/01/2021  
**Distance Learning:** No  
**Distance Learning Date:** 12/01/2021  
**Entry Date:** 12/01/2021  
**Status Start Date:** 12/01/2021  
**Status End Date:**

**Comments:** Auto-Generated TAA In-Training Status record  
**Created By:** Sheila Sloan   **Date Created:** 12/01/2021  
**Last Updated By:** Sheila Sloan   **Date Last Updated:** 12/10/2021

Click **Add 60 Day Review**.

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

**List 60 Day Reviews**  
[Steve Perry](#) [Application Summary](#)  
SSN: 0503 App LWA:15 App Date:02/13/2019

[Add 60 Day Review](#) [Printable 60 Day Reviews](#) [Return](#)

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Review Date	Date Entered	Review Type	Career Planner
There are no 60 Day Review records at this time.			

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[Add 60 Day Review](#) [Printable 60 Day Reviews](#) [Return](#)

Enter **Review Date**.

Enter **Review Type** (either Academic Standing or On Track to Complete Training Within Timeframe).

Select the **Outcome**:

**Satisfactory**

**Not Met – Warning** – This outcome requires additional steps be completed:

- 1) Complete and send to the participant the **Trade Training Benchmark Warning Letter Commerce/Trade Form #006c**.
- 2) The date the training benchmark warning letter is mailed must be recorded in the **60 Day Review Comments Box**.

**Not Met – Modification** – This outcome requires additional steps be completed:

- 1) Complete and send to the participant the **Trade Training Benchmark Warning Letter Commerce/Trade Form #006c**.
- 2) The date the training benchmark warning letter is mailed must be recorded in the **60 Day Review Comments Box**.
- 3) A meeting must be held with the participant to modify the training program, if possible. Indicate the reason why the modification is necessary in the **60 Day Review Comments Box**.
- 4) Follow the **IEP Modification** process to obtain state merit staff approval.

**Not Met – No Completion TRA** – This outcome is selected if a modification to the training plan is not feasible. This outcome also requires additional steps be taken. See the instructions below for the additional steps to complete for this outcome.

Enter relevant **Comments** as to the status of the review.  
 Click on **Save** if finished adding both benchmark reviews or click on **Save, Add Another** to repeat the process to add the 2<sup>nd</sup> Benchmark review.

**Case Management**

**Maintain 60 Day Review**  
[Steve Perry](#) [Application Summary](#)  
 SSN: 0503 App LWA:15 App Date:02/13/2019

\*Review Date: 12/15/2021  
 \*Review Type: Academic Standing  
 Data Entry Date: 12/15/2021  
 Career Planner: Sheila Sloan  
 \*Outcome: Satisfactory

**Comments:**  
 Participant reported his current grades are an A and a B. He is passing his clinical practicum. His cumulative GPA is 3.6. He continues to remain in good academic standing as defined by

Save, Add Another Save Return

This is what the **List 60 Day Reviews Screen** looks like when benchmarks are entered.

**Case Management**

**List 60 Day Reviews**  
[Steve Perry](#) [Application Summary](#)  
 SSN: 0503 App LWA:15 App Date:02/13/2019

Add 60 Day Review Printable 60 Day Reviews Return

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	Review Date	Date Entered	Review Type	Career Planner
<a href="#">View</a>	12/15/2021	12/15/2021	Academic Standing	Sheila Sloan
<a href="#">View</a>	12/15/2021	12/15/2021	On Track to Complete Training Within Timeframe	Sheila Sloan

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Add 60 Day Review Printable 60 Day Reviews Return

To view the entry, you can click **View** beside each one individually, or you can click **Printable 60 Day Reviews** to see the entire list of reviews in addition to the comments.

Add **Case Management Services** in IWDS on the WIOA and Trade applications based on the following:

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 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", 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	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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Click **Add Additional Episode**.

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[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:** 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: Completed 60 day benchmarks. (Enter a statement about whether the participant is meeting or not meeting one or both benchmarks and what the outcome of the two benchmarks are).

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 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 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.

**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.

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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	<a href="#">Career Planning (Case Management) - IDC</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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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: Completed 60 day benchmarks. (Enter a statement about whether the participant is meeting or not meeting one or both benchmarks and what the outcome of the two benchmarks are).

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), and "FAQs" (I'm Done: Log Off). The main content area features a yellow "Informational Message" box stating that a Case Note is required when adding an Additional Episode to a Same Day Service. Below this is the "Add Case Note" form, which includes a "Staff Name" field (Steve Perry) and a link to "Application Summary". The form fields are: "\*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 located at the bottom of the form.

## Additional Steps for Not Met – No Completion TRA Outcome

If the outcome of Not Met – No Completion TRA is selected, the career planner must do the following:

Process an **IEP Modification** for state merit staff approval for the **Potential Suspension Request** after the following steps are completed.

Complete and send to the participant the **Trade Potential Suspension Letter Commerce/Trade Form #003c**.

Enter a **Potential Suspension Request Status Record** utilizing the reason of **Not Met – No Completion TRA**.

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 the following information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", "App Date:02/13/2019", and a "Printable Application" button. Below this, there 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). At the bottom right, there is an "Exit" section with 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 Add TAA Status.

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

### 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		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

 

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Select **Potential Suspension Request** from the drop down for **Status**.  
 Enter the **Status Start Date**. Timely entry of this status is very important because the system will not allow you back date prior to the date of entry.  
 Select **Benchmarks Not Met, No Completion TRA** from the drop down for the **Suspension Request Reason**.  
 Enter a comment in the **Comment Box**.  
 Click **Save**.


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

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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:**

This is what the **List TAA Status** looks like when the **Potential Suspension Request** has been added.


IWDS
Illinois Workforce  
Development System
Case Management

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**Case Notes**

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**FAQs**

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### 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"/>	12/15/2021		Potential Suspension Request	Pending Approval	<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021