Entity Management Cleanup Guide for LWIA Entity and Location Records

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Audience: Provider Managers

Purpose

Maintaining accurate Entity Management records in IWDS 2.0 helps ensure proper system functionality and reduces errors related to locations, contacts, and service delivery. IWDS users with the Provider Management role are responsible for reviewing and maintaining their LWIA entity and associated locations.

Objectives

Upon completion of the cleanup process, each LWIA should have:

- One active LWIA entity record.
- One active record for each physical location.
- Duplicate and closed locations deactivated.
- Accurate contacts associated with active locations.
- Active relationships associated with the correct LWIA locations.
- Government Entity records are retired when duplicate LWIA records exist.
- Accurate location functions and services configured for future system use.

Intended Audience

This guide is intended for:

- Provider Managers
- Local System Administrators
- Staff responsible for LWIA Entity Management maintenance

Users who are unfamiliar with Entity Management should review the standard Entity Management training materials before performing cleanup activities.

Part 1: Review the LWIA Entity

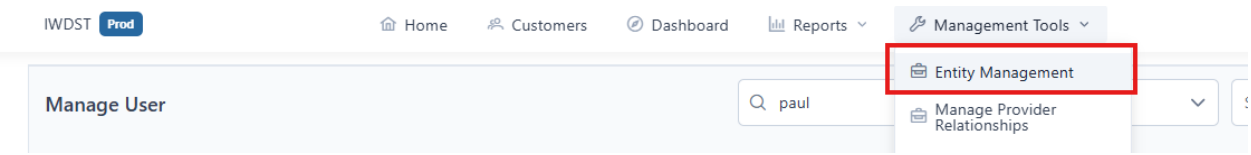
Step 1

Log in to IWDS 2.0 using an account with the Provider Management role**.**

Step 2

Navigate to:

Management Tools → Entity Management



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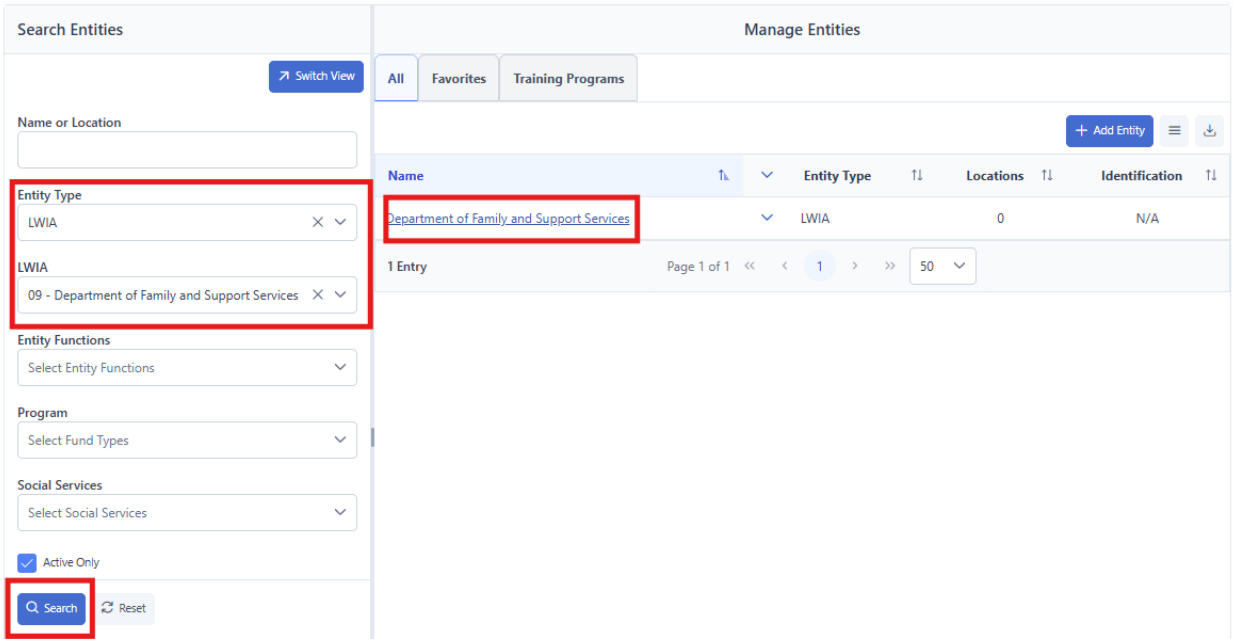
Step 3

- Select **LWIA** from the **Entity Type** filter.
- Select your LWIA from the **LWIA** filter.
- Click **Search**.
- Open your LWIA entity record by clicking on the Entity name.

> ***Note:*** *Due to historical data conversions from IWDS 1.0, some areas may have multiple entity records with similar names. Always use the Entity Type filter to ensure you are working with the LWIA entity record rather than a Government Entity record.*



Step 4

Review:

- General Information
- Locations
- Contacts

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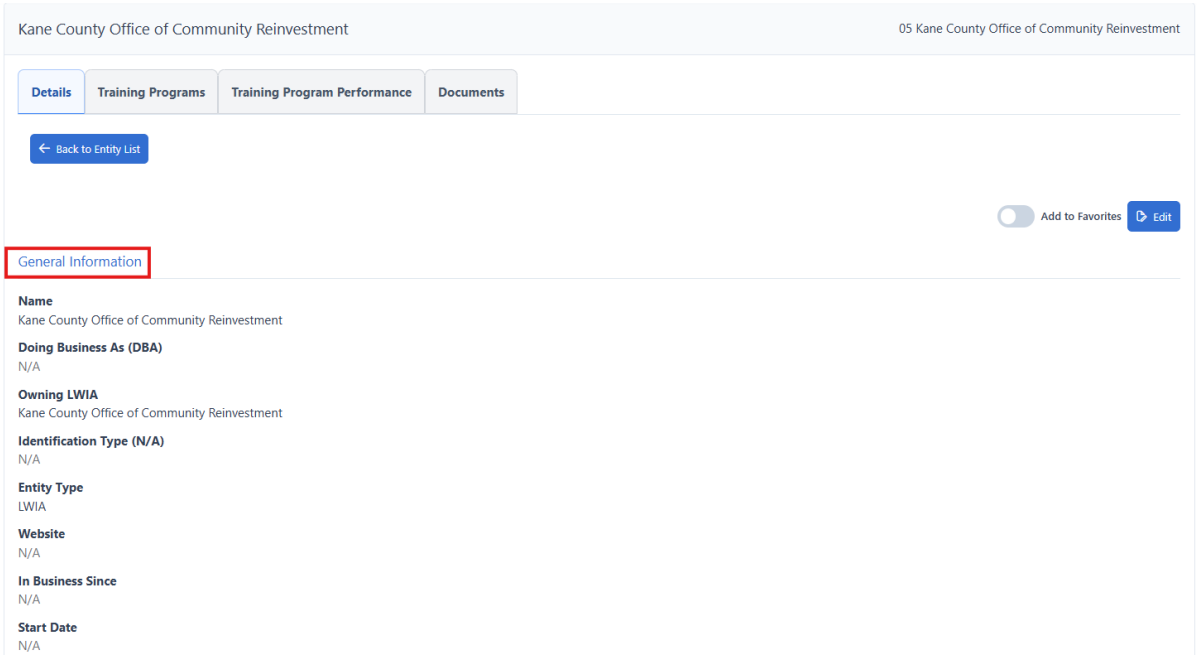
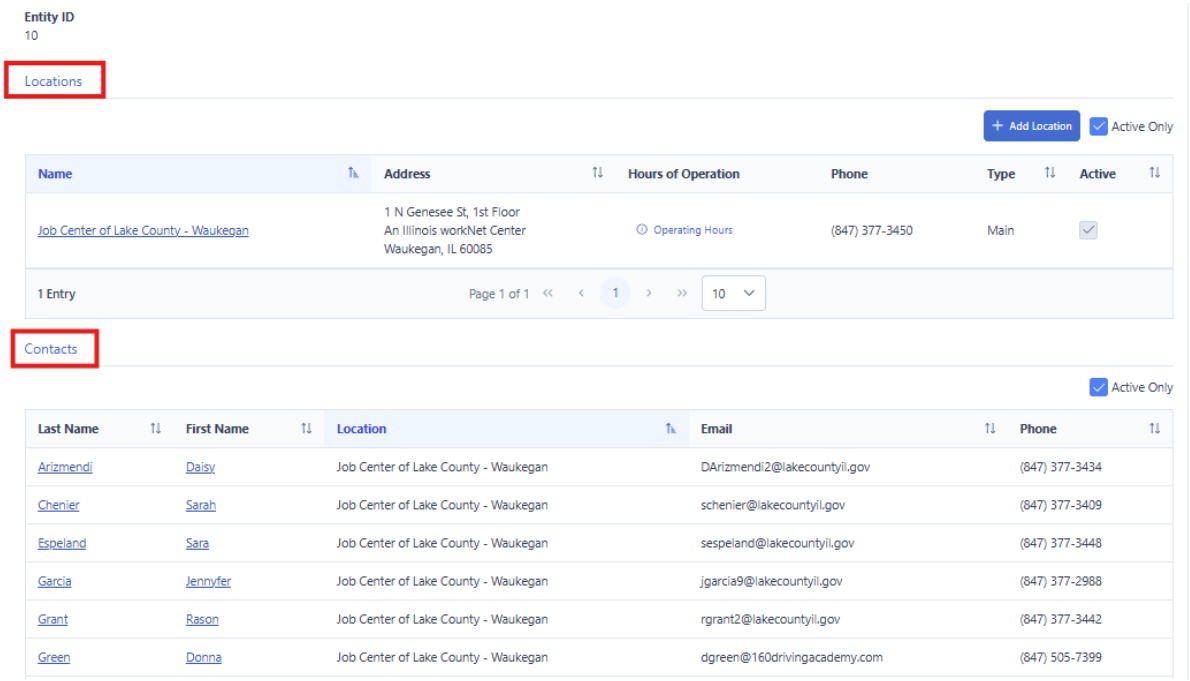


Step 5

Confirm:

- Only current locations remain active.
- Duplicate records have been identified.
- Contacts are assigned to active locations.



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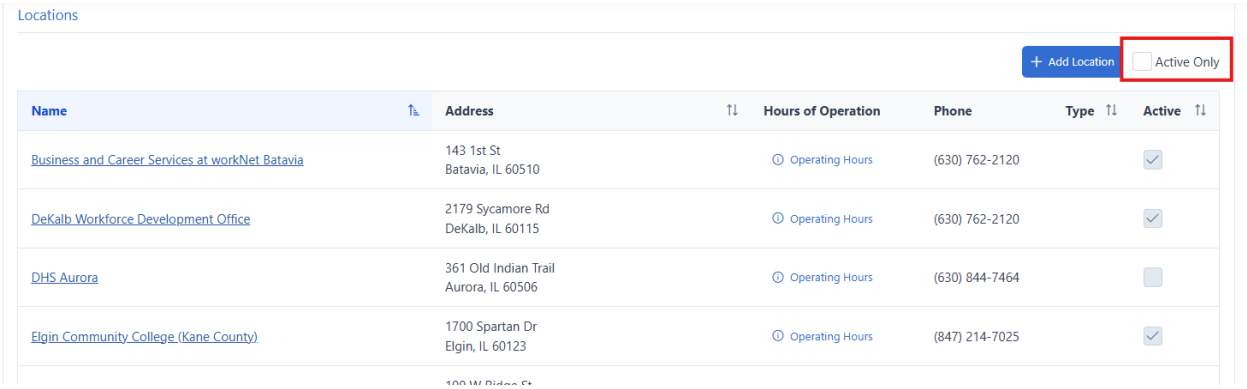
Part 2: Review and Deactivate Locations

Important:

Deactivation does not delete data.

Inactive locations remain available for historical reporting and reference purposes. Users can view inactive locations by selecting the option to display inactive records.

Because the system retains inactive records, deactivation is the preferred method for managing duplicate or obsolete locations. Deselecting the Active Only button will display Inactive locations.



Location Deactivation Review Checklist

Before deactivating a location, review the following:

Relationships

- All active relationships associated with the location must be reviewed and ended before the location is deactivated.
- IWDS currently provides warnings when active relationships exist.

Training Provider Locations

- A location cannot be deactivated if it is the only location associated with an active ETPL-approved training program.
- If the training provider has another active location, update the training program to use the new location before deactivating the old location.

Customers

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- The current system allows a location to be deactivated even if customers are associated with the location.
- However, LWIAs should review customer assignments before deactivation to avoid operational issues.

Contacts and Career Planners

The current system allows deactivation even when contacts are associated with the location.
Before deactivating a location:

- Confirm staff are associated with the correct active location.
- Review Career Planner assignments when applicable.

Reactivating a Location

If a location is deactivated accidentally:

1. Open the inactive location.
2. Select Edit.
3. Remove the End Date to re-enable Active Status.
4. Save the record.

Open a Location Record

Step 1

Open the LWIA Entity.

Step 2

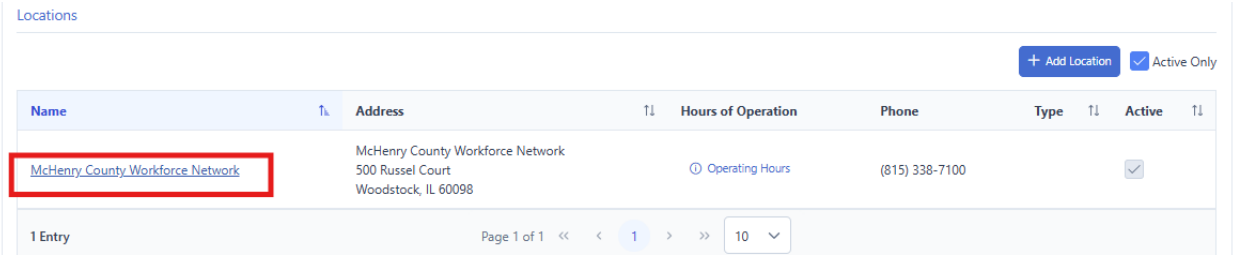
Scroll down to the Locations section.

Step 3

Locate the desired location.

Step 4

Open the Location Record by clicking on the location name.



Deactivating a Duplicate Location

Step 1

Open the duplicate location.

Step 2

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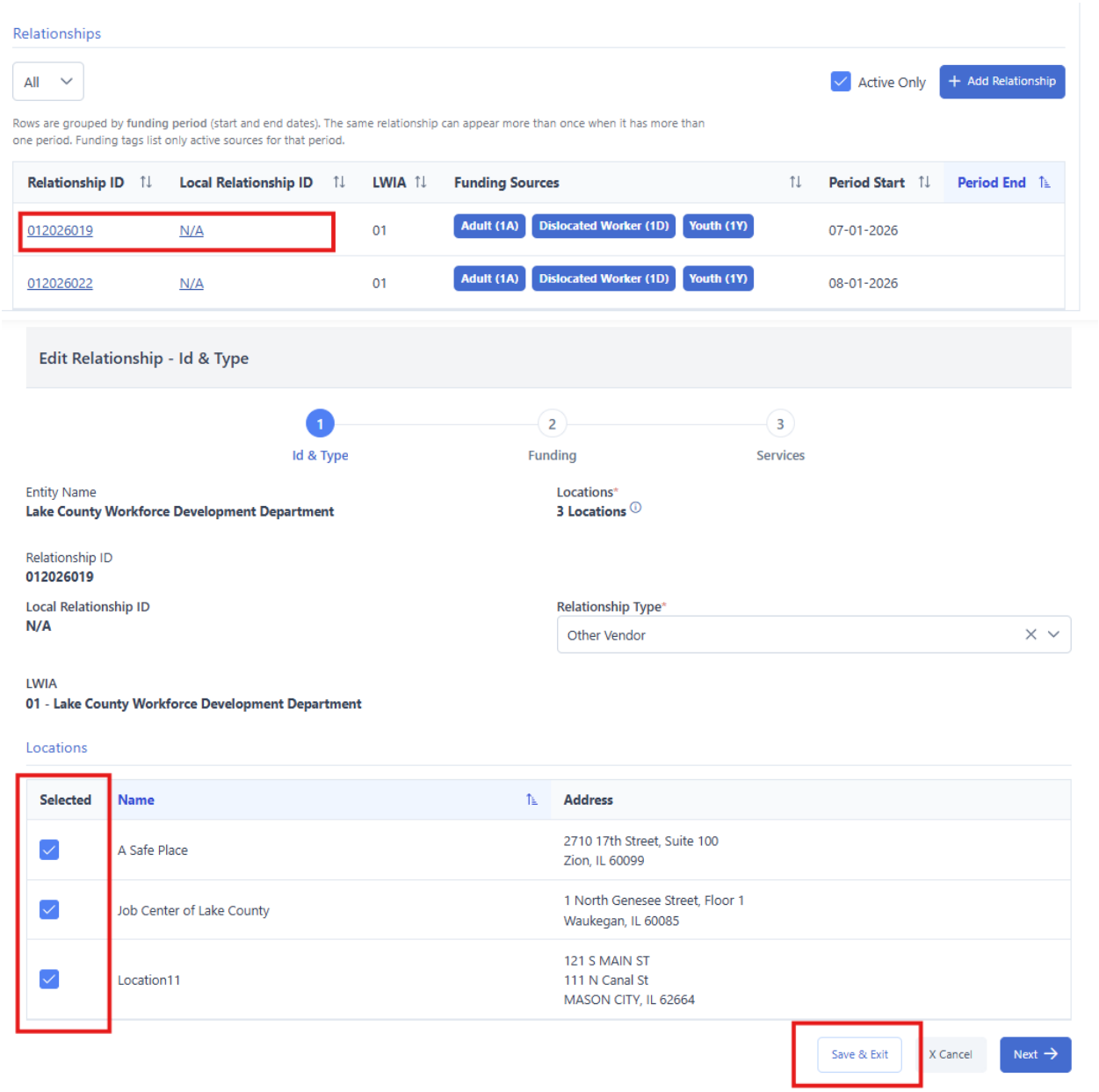
End any relationships for the location to be deactivated.

1. Click on the relationship ID associated with the Location
2. Click Edit button on the Manage Relationship page
3. Unselect the Location to be deactivated from the Locations section.
4. Click Save and Exit



Step 2

Select Edit on the Location Details page.

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Step 3

Enter an End Date that is today or earlier.

Step 4

Modify the Location Name.

Use the following naming convention:

[Location Name] - DUPLICATE ENTRY

Example:

Bloomington American Job Center - DUPLICATE ENTRY

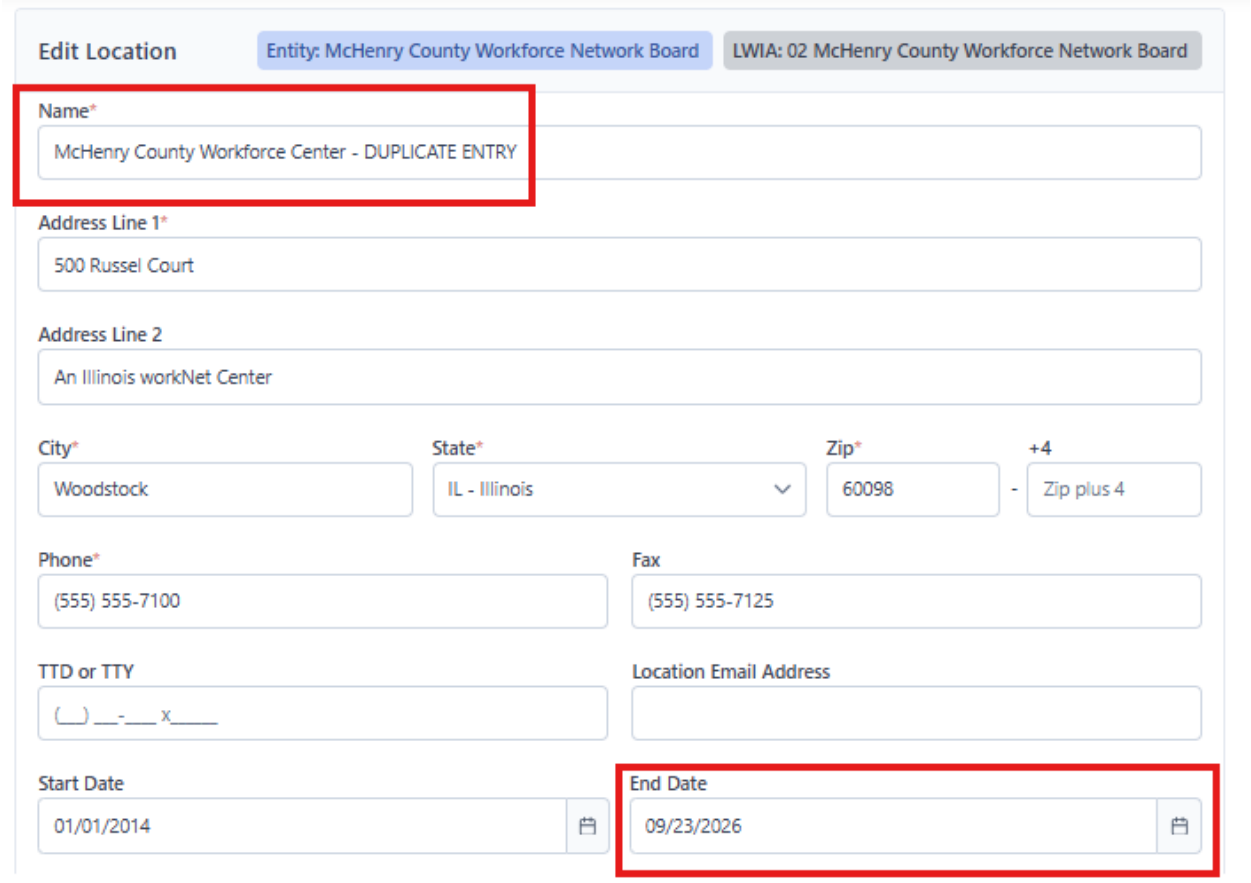
> ***Note:*** *Location names cannot contain an ampersand (&) or multiple special characters in a row. Records imported from IWDS 1.0 that contain these characters must be corrected before any updates can be saved.*

Step 5

If more than one duplicate exists, append a number:

- DUPLICATE ENTRY 1
- DUPLICATE ENTRY 2

This is necessary because IWDS does not allow multiple locations with identical names.



Step 6

Save the record.

Step 7

Verify the location no longer displays as an active location.

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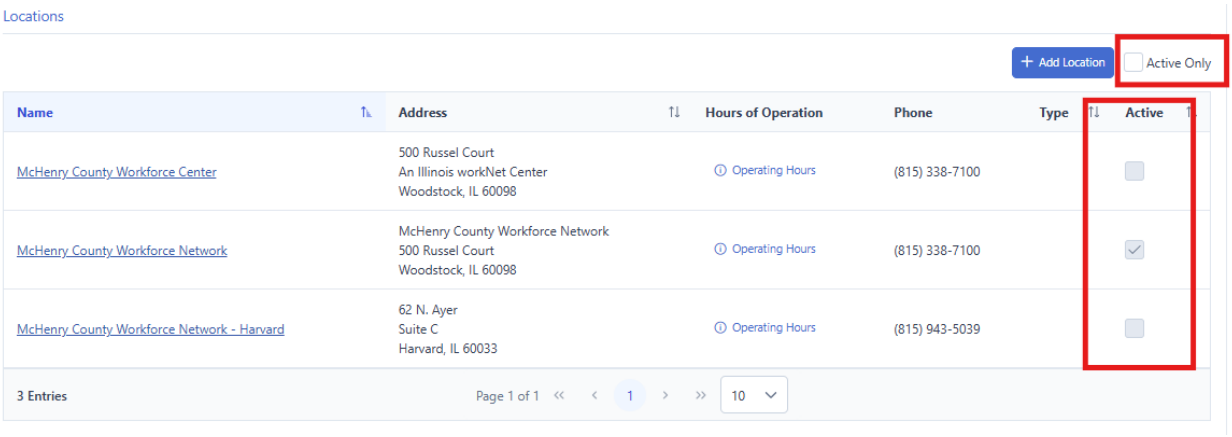
- Navigate back to the LWIA Entity record.
- Unselect the **Active Only** checkbox in the Locations section.
- Deactivated locations will display.



Deactivating a Closed Location

Step 1

Open the location.

Step 2

End any relationships for the location to be closed.

1. Click on the relationship ID associated with the Location
2. Click Edit button on the Manage Relationship page
3. Unselect the Location to be closed from the Locations section.
4. Click Save and Exit



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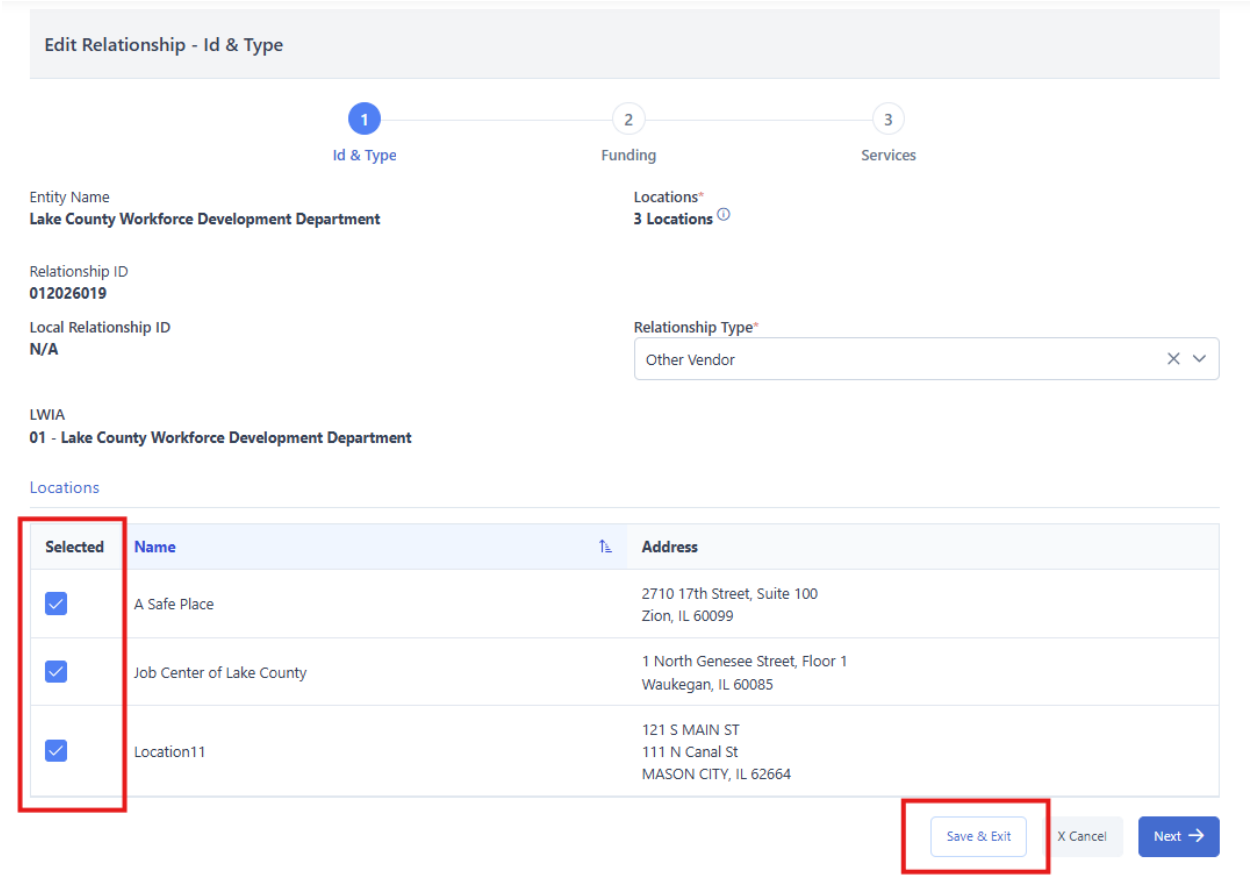

Step 3

Select Edit.

Step 4

Enter an End Date that is today or earlier.

Step 5

Rename the location using the following convention:

[Location Name] - CLOSED

Example:

Bloomington American Job Center - CLOSED

Step 6

Save the record.

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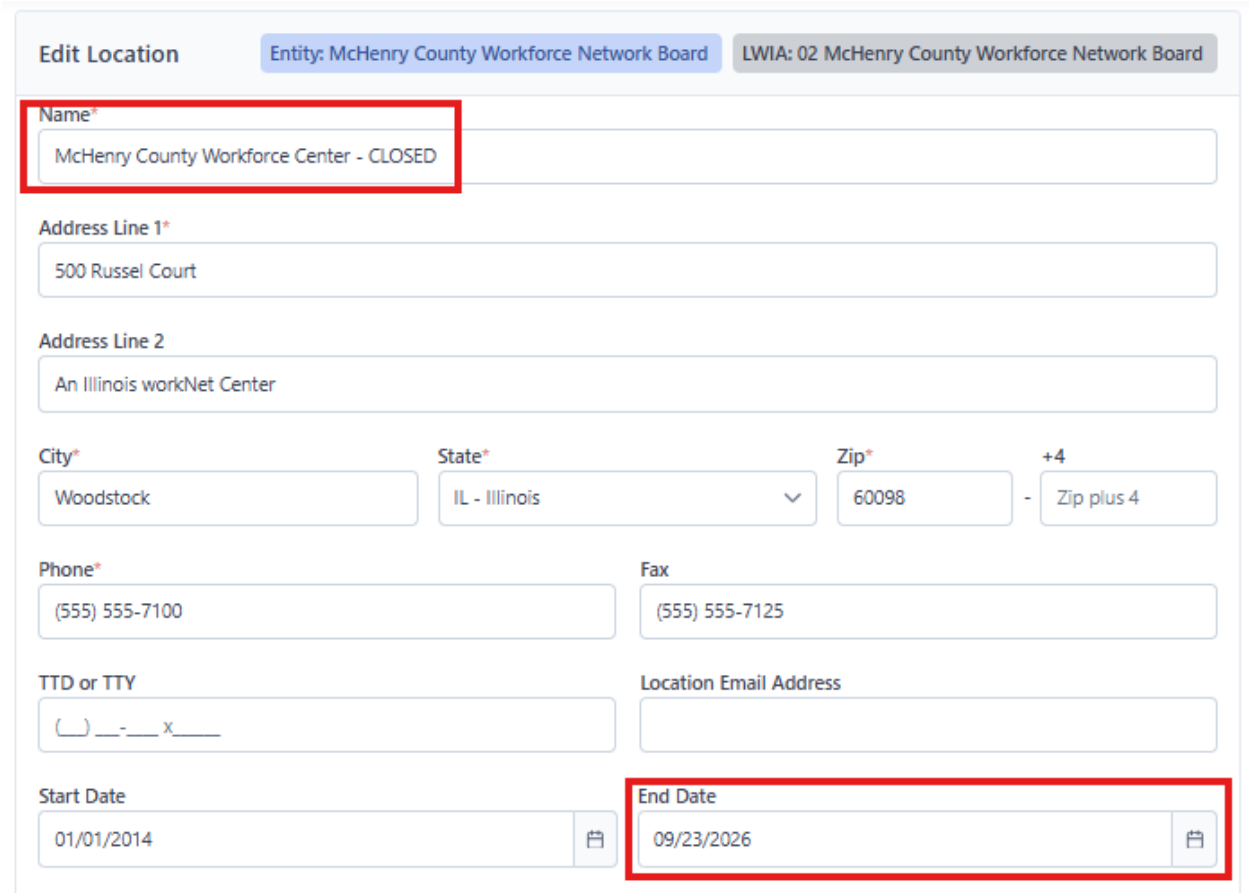
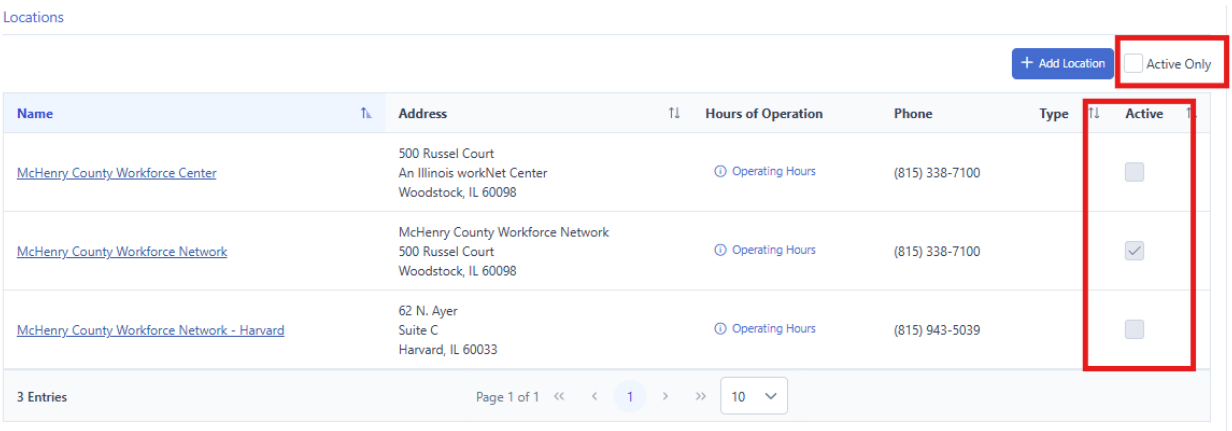


Step 7

Verify the location no longer displays as an active location.

- Navigate back to the LWIA Entity record.
- Unselect the **Active Only** checkbox in the Locations section.
- Deactivated locations will display.



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Part 3: Government Entity Cleanup

Background

Many locations were historically maintained under both:

- LWIA Entities
- Government Entities

This occurred because IWDS 1.0 stored LWIA information differently than IWDS 2.0.
In IWDS 2.0, LWIA entities should function as the primary record.

> ***Note:*** *Many LWIAs have Government Entity records whose names closely resemble their LWIA Entity records. Review the Entity Type carefully when evaluating records to ensure relationships and contacts are being maintained under the correct LWIA location.*

Required Action

When duplicate records exist:

Retain

- LWIA Entity
- LWIA Locations

Retire

- Government Entity
- Government Entity Locations

Recreate

- Relationships currently associated with Government Entity locations must be recreated under the appropriate LWIA location.

  > ***Note:*** *Leaving active relationships under Government Entity locations may prevent staff from locating the correct LWIA location when performing customer-related activities. All applicable relationships should be recreated under the LWIA location before the Government Entity record is retired.*

Contacts

Contacts should be associated with the LWIA location rather than the Government Entity location.

Goal

There should be one location record serving as the authoritative provider record.

Part 4: Creating and Maintaining Active Locations

Determining the Correct Entity Type

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Before creating a location, determine whether it belongs under the LWIA entity or another entity type.

Current Guidance

If a location:

- Provides direct workforce services
- Is a comprehensive center
- Is an affiliate center
- Is a satellite office
- Contains Career Planners or case management staff

Then it should generally be maintained under the LWIA entity.

Creating a New Location

Step 1

Select Add Location.

Step 2

Complete required fields.

Step 3

Enter Hours of Operation.

Step 4

Configure:

- WIOA Title I Programs Served
- Hide from Customer Self-Service
- Entity Functions
- LWIA Office Assistance Categories
- Social Services

Step 5

Save the location.

Step 6

Associate contacts.

> ***Note:*** *This guide focuses on entity cleanup and maintenance activities. For detailed instructions on creating entities and locations, refer to the Entity Management training materials.*
>
> Adding and Editing an Entity Quick Start Guide



Important

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Entity Functions and Services must be maintained accurately.

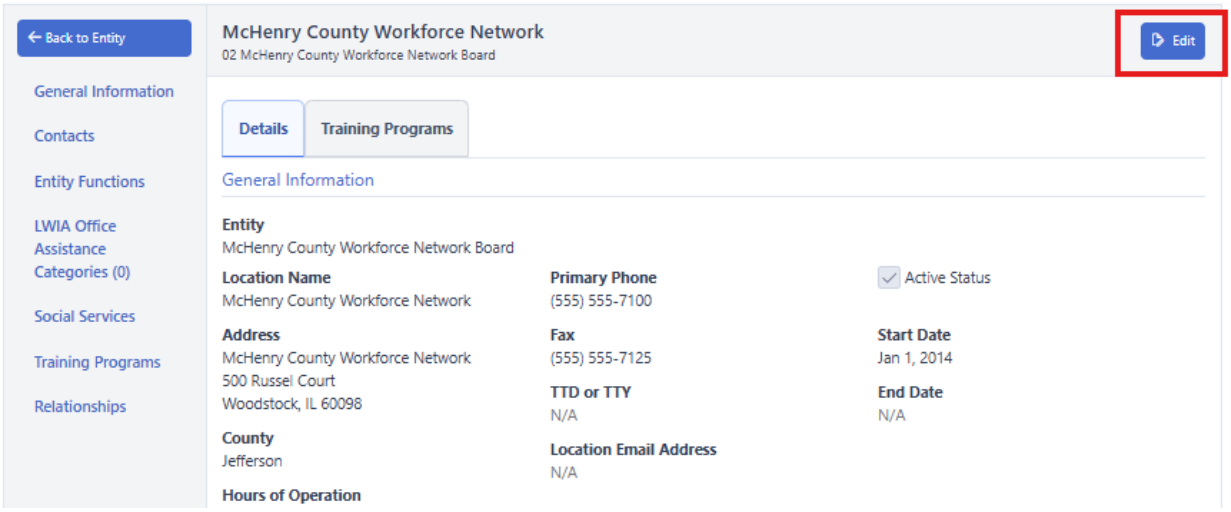
These fields will become increasingly important as service finder and referral functionality continue to expand.

Updating Active Locations

Periodical review:

- Address
- Phone Number
- Hours of Operation
- ADA Compliance Indicator
- Customer Self-Service Indicator
- WIOA Title I Programs Served
- Entity Functions
- LWIA Office Assistance Categories
- Social Services
- Contacts
- Relationships

Update records whenever business operations change.



Office Visibility Configuration

Office Visibility Configuration allows LWIA administrators to control:

- Whether a location appears to customers during self-service application submission.
- Which WIOA Title I programs a location is authorized to receive applications for.

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These settings affect customer-facing office selection during self-service application submission but do **not** affect staff access to office locations or customer assignment functions. Authorized staff can continue to view and assign customers to all active LWIA locations regardless of these settings

Configuration Options

The **Hide from Customer Self-Service** checkbox determines whether a location is visible to customers during self-service intake and application submission.

When Selected

- Customers cannot view or select the office during self-service application submission.
- Authorized staff can still view the office.
- Authorized staff can still assign or reassign customers to the office.

When Not Selected

- The office may be available to customers, provided all other office eligibility requirements are met.

WIOA Title I Programs Served

The **WIOA Title I Programs Served** field identifies which program applications the office can receive.
Available values:

- Adult
- Youth
- Dislocated Worker

An office may be configured for:

- One program
- Multiple programs
- All programs

Customers will only be shown offices that are configured to serve the applicable WIOA Title I program.

Edit Office Visibility Settings

Step 1

Select the **Hide from Customer Self-Service** checkbox if the office should remain available to staff but should not be available for customer self-service applications.

Step 2

Select one or more of the following in the **WIOA Title I Programs Served** dropdown:

- Adult
- Youth
- Dislocated Worker

Choose all programs that the office is authorized to receive and service.

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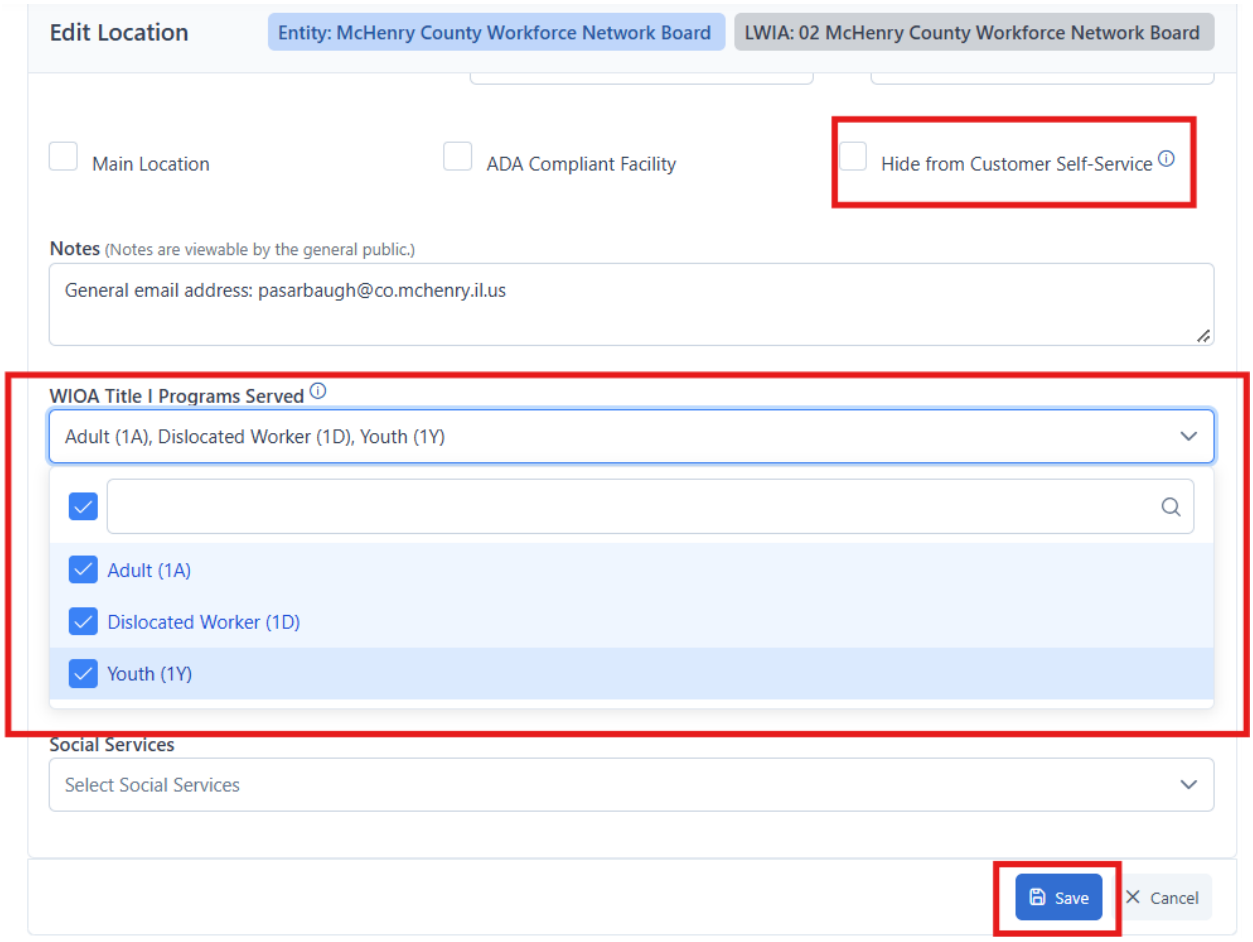
Step 3

Select **Save**.



Part 5: Managing Contacts

Contact Review

For every active location:

Verify

- Active staff appear on the location.
- Career Planners are associated correctly.
- Managers are associated correctly.
- Duplicate contacts have been reconciled.

Use Existing Contacts

When adding an existing IWDS user to the location:

Use **Select Contacts** rather than **Add Contact**.

This helps prevent duplicate records.

Duplicate Contact Cleanup

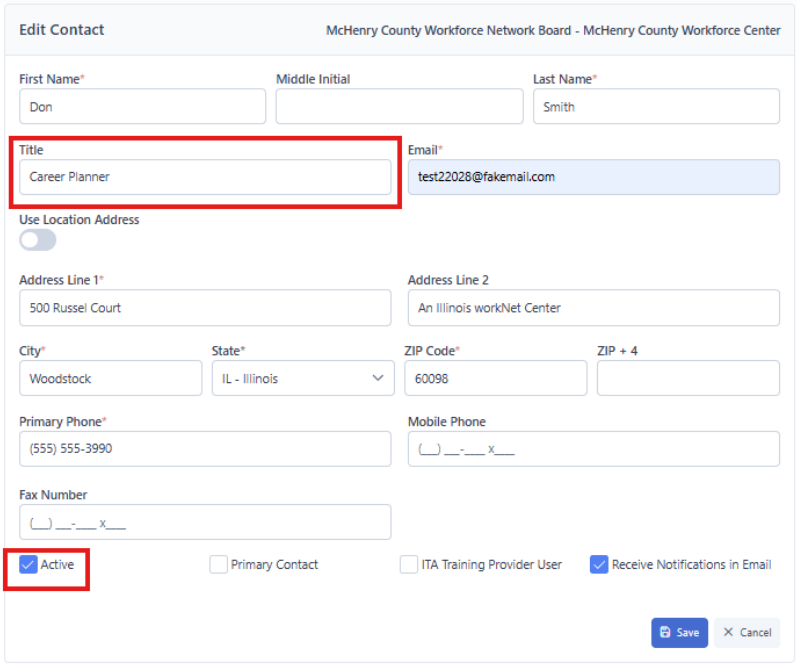
If duplicate contacts exist because of migrated data:

- Retain the correct record.
- Rename the duplicate record as needed.
    - Append (Duplicate) after the last name of a duplicate contact to prevent errors when saving.
- Deactivate the duplicate record.

Contact Titles

Drop down options include:

- Career Planner
- Career Planner Supervisor
- Other



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Part 6: Managing Relationships

Relationships are one of the most important components of the cleanup effort because they determine how locations are used within IWDS.

Review Existing Relationships

For each active location:

Verify

- Relationships are still valid.
- Services are accurate.
- Funding assignments are accurate.
- Dates are current.

End Invalid Relationships

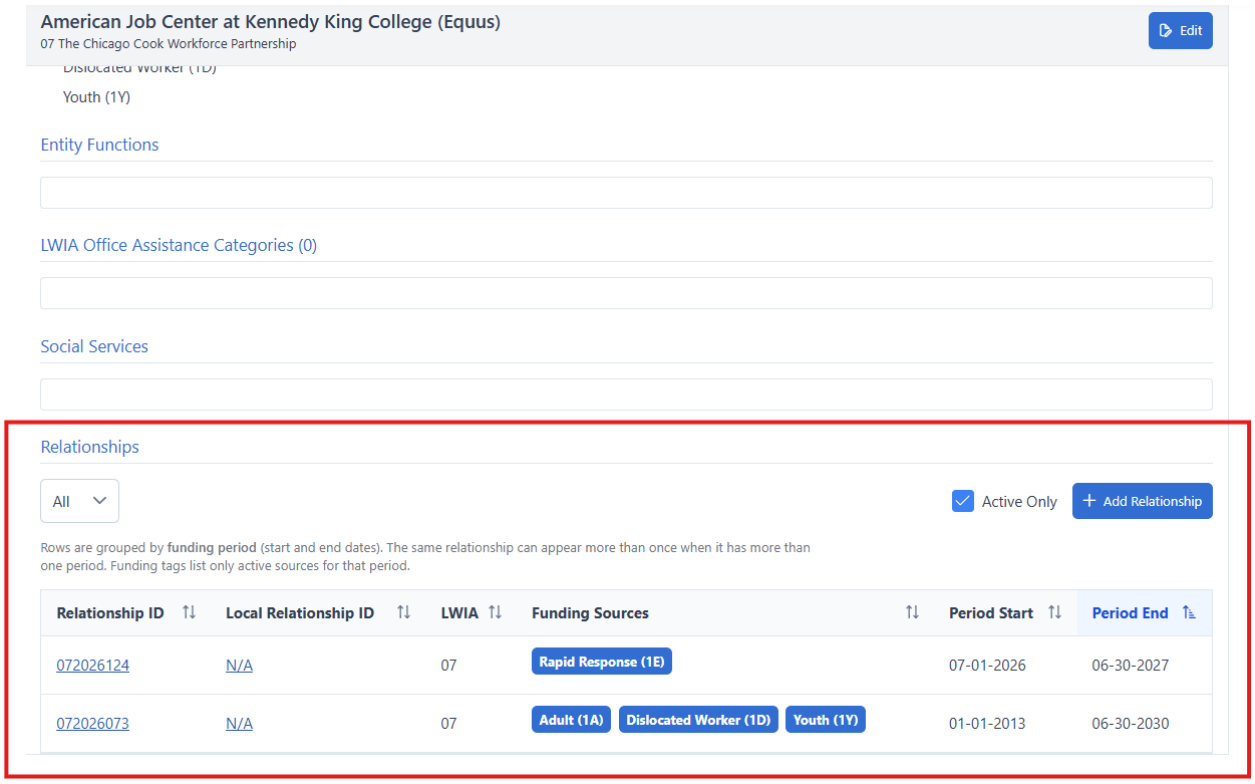
Relationships that no longer apply should be ended prior to location deactivation.

Creating Relationships

When recreating relationships under LWIA locations:

1. Identify any relationships are currently associated with the Government Entity location.
2. Create equivalent relationships on the LWIA location.
3. Verify service selections.
4. Verify program selections.
5. Verify effective dates.
6. End any obsolete relationships.

> ***Note:*** *Before ending a funding period, create and verify the replacement relationship. Ended funding periods cannot be reopened or edited, are only visible through* ***Show All*** *on the View page and may prevent the same funding source from being re-added if the dates overlap.*



Review the document below to understand the importance of relationships.

Relationships_Overview.docx

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's Employment and Training Administration.

For more information, please refer to the footer at the bottom of any webpage at www.illinoisworknet.com.

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