LWIA 7 Site Leader Role in IWDS 2.0

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS

Purpose

This document explains the permissions available to an IWDS 2.0 user with the LWIA 7 Site Leader role.

Audience

This document is designed to inform IWDS users about user roles.

How Access Works

Access is based on two simple things: where you work (Location) and what you're allowed to do (Role).



Location *defines* where a user can do something — statewide, an LWIA, or a single office.

Role *defines* what a user can do — the functions and records they can reach.

The LWIA 7 Site Leader role provides designated LWIA 7 users with a deeper level of access and visibility into the system, customer information, and user activity. This role is best suited for site managers at LWIA 7 sites.

They can:

- Add a customer to IWDS 2.0
- Edit the customer's profile
- Send pre-screen links to the customer
- Complete the pre-screen and application with the customer
- Reopen applications
- Create referrals before and after enrollment

- Create and delete case notes
- View confidential and non-confidential case notes
- Upload documents on behalf of the customer, like resumes, work history, and application documentation
- Add self-service and information-only services
- Enroll customers other than 5% youth customers
- Add assessments, including the getting started assessment
- Create and delete career plans and manage customer services
- Enter MSGs, employment, and outcomes
- Upload and export negotiated goals

- They cannot: enroll 5% of youth customers, assign roles and permissions, view customer SSNs, create or update grants, delete applications, update ETPL applications, update training programs.

Permissions Granted

Broad operational access across functions and complex cases. Create, edit, run all reports, and access most tools. Has case management access and can assign customers.

Permission	Description	Scope
APPLICATION MANAGEMENT		
List applications *application-browse*	Allows a user to read application records.	LwiaWithOfficeNarrowing
Certify application *application-certify*	Allows a user to certify an application.	LwiaWithOfficeNarrowing
Close application *application-close*	Allows a user to close an application.	None
Create application *application-create*	Allows a user to create an application.	None
Application Intake *application-intake*	Start Intake button on Program Summary Open Items tab; modal Confirm gated on same key.	None
Reopen application	Allows a user to reopen an application.	None

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Permission	Description	Scope
application-reopen		
Update application *application-update*	Allows a user to update application data.	LwiaWithOfficeNarrowing
ASSESSMENT		
View assessment *assessment-browse*	Allows a user to read an assessment.	LwiaWithOfficeNarrowing
Create assessment *assessment-create*	Allows a user to create an assessment.	LwiaWithOfficeNarrowing
Update assessment *assessment-update*	Allows a user to update an assessment.	LwiaWithOfficeNarrowing
TRAINING & EDUCATION (TEA) ASSESSMENT		
View TEA assessment *teaassessment-browse*	Allows a user to view Training and Education Assessments.	LwiaWithOfficeNarrowing
Create TEA assessment *teaassessment-create*	Allows a user to create Training and Education Assessments.	LwiaWithOfficeNarrowing
Update TEA assessment *teaassessment-update*	Allows a user to update Training and Education Assessments.	LwiaWithOfficeNarrowing
CAREER PLAN		
View career plan *career-plan-browse*	Allows a user to read a career plan.	LwiaWithOfficeNarrowing
Create career plan *career-plan-create*	Allows a user to create a career plan.	None
Delete career plan *career-plan-delete*	Allows a user to delete a career plan.	None
Update career plan *career-plan-update*	Allows a user to update a career plan.	LwiaWithOfficeNarrowing
CASE NOTES		
List case notes *case-notes-browse*	Allows a user to see the case notes link under Participant summary tools in the customer profile.	None
View all case notes *case-notes-browse-confidential*	Allows a user to view confidential case notes.	None
Create case note *case-notes-create*	Allows a user to create case notes.	None
Delete case note *case-notes-delete*	Allows a user to delete case notes.	None
Update case note *case-notes-update*	Allows a user to update case notes.	None
CASE NOTE ATTACHMENTS		
View case note attachment *case-note-attachment-view*	Allows a user to preview an attached file on a case note in an in-browser modal.	None
CUSTOMER MANAGEMENT		

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Permission	Description	Scope
List customers *customer-browse*	Allows a user to access and search the customer list, set columns, and open a customer's profile.	LwiaWithOfficeNarrowing
Create customer *customer-create*	Allows a user to create a customer.	Lwia
Update customer *customer-update*	Allows a user to update customer details.	LwiaWithOfficeNarrowing
Update customer characteristics *customer-characteristic-update*	Allows a user (typically a Career Planner) to update Customer Characteristic cards on the In-Program Updates page.	LwiaWithOfficeNarrowing
List customer logs *customer-log-browse*	Allows a user to view the Logs link and search the Logs page.	LwiaWithOfficeNarrowing
PRE-RECORD INTAKE		
List pre-record intakes *pre-record-intake-browse*	Allows a user to access and search the pre-record-intake list under Customers.	None
REFERRALS		
List referrals *referral-browse*	Allows a user to see the referrals link and search the referrals page.	LwiaWithOfficeNarrowing
Create referral *referral-create*	Allows a user to create a referral.	LwiaWithOfficeNarrowing
Update referral *referral-update*	Allows a user to update a referral.	LwiaWithOfficeNarrowing
RESUMES		
List resumes *resume-browse*	Allows a user to view the Resumes link and search the Resumes page.	LwiaWithOfficeNarrowing
Upload resume *resume-create*	Allows a user to add a file to the Resumes page.	LwiaWithOfficeNarrowing
SELF-SERVICE		
List self-services *self-service-browse*	Allows a user to see and search self-services.	None
Create self-service *self-service-create*	Allows a user to create self-services and information-only services.	None
SERVICE COLLECTIONS		
Create service *service-collection-create*	Allows a user to create a service.	None
Update service *service-collection-update*	Allows a user to update a service.	None
UPLOADS		
List uploads *upload-browse*	Allows a user to view and search the Uploads page.	LwiaWithOfficeNarrowing
Upload file *upload-create*	Allows a user to add a file to the Uploads page.	LwiaWithOfficeNarrowing

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Permission	Description	Scope
View upload *upload-view*	Allows a user to preview an uploaded document in an in-browser modal.	LwiaWithOfficeNarrowing
REPORTS		
View reports *report-browse*	Allows a user to access the reports section.	Lwia
Edit reports *report-update*	Allows a user to use reports functionality.	Lwia

Granting Role Access

Account managers can grant and remove access to users. Connect with the Account Manager at your location for this access.

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.