



# Contents

**OVERVIEW .....2**

PURPOSE: .....2

WHO ENTERS AND MAINTAINS THE DATA? .....2

GAINING ACCESS TO MANAGE WIOA ePOLICY .....2

ACCESS WIOA ePOLICY MANAGEMENT PAGE .....2

HOW IS WIOA ePOLICY ORGANIZED? .....3

**WIOA ePOLICY SECTIONS .....4**

OVERVIEW .....4

ADDING AND EDITING POLICY .....4

*Adding Policy*.....4

*Editing Policy*.....5

ADDING AND EDITING DOCUMENTS .....6

*Adding Documents* .....6

*Managing Documents*.....7

*Editing Documents* .....7

*Uploading New Versions* .....7

*Tagging Documents* .....7

*Returning to Documents List* .....7

ADDING AND EDITING NOTICES .....7

*Adding Notices* .....8

*Managing Notices* .....8

*Editing Notices* .....8

*Uploading New Versions* .....8

*Tagging Notices*.....8

*Returning to Notices List* .....8

ADDING AND EDITING RESOURCES AND REFERENCES .....9

*Adding Resources and References*.....9

*Managing Resources and References* .....9

*Editing Resources and References*.....9

*Tagging Resources and References*.....9

ADDING AND EDITING HELPFUL LINKS.....9

*Adding Helpful Links*.....10

*Managing Helpful Links*.....10

*Editing Helpful Links*.....10

ADDING AND EDITING GLOSSARY TERMS.....10

*Adding Glossary Terms*.....10

*Managing Glossary Terms*.....10

*Editing Glossary Terms*.....11

ADDING AND EDITING CONTACTS .....11

*Adding Contacts* .....11

*Managing Contacts* .....11

*Editing Contacts* .....11

        Adding Phone Numbers.....11

        Adding Assignments .....12

VIEW AND REMOVE TAGS .....12

*Removing Tags* .....12

VIEW AND REMOVE ASSIGNMENTS .....12

*Removing Assignments* .....12



## Overview

### Purpose:

The WIOA ePolicy app is an interactive manual Commerce partners utilize to:

1. Manage and update the State Plan for the Workforce Innovation and Opportunity Act (WIOA).
2. Upload forms, instructions and other documents in the policy.
3. Add or make edits to the glossary, references and policy.
4. Preview and print policy by chapters and/or sections.

### Who Enters and Maintains the Data?

Authorized Commerce staff manages information available in the WIOA ePolicy app. Access to manage the WIOA ePolicy app is granted upon Commerce approval and provided through a user's Illinois workNet account.

### Gaining Access to Manage WIOA ePolicy

Visit [www.illinoisworknet.com](http://www.illinoisworknet.com) to create an Illinois workNet account if you do not yet have one.

1. Send an email, requesting access to Manage WIOA e-Policy, to [info@illinoisworknet.com](mailto:info@illinoisworknet.com). In your email include your first and last name along with your Illinois workNet username.
2. Illinois workNet will contact the appropriate Commerce staff to verify your access request.
3. Illinois workNet will contact you once access is granted.
5. You will have access to management tools from the WIOA ePolicy Menu on [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).

### Access WIOA ePolicy Management Page

Access management tools to add and edit policy, glossary terms, resources/references and other policy materials by following these steps:

1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Select **Login** on the top right of the header and sign into your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**, then select the item you wish to manage.



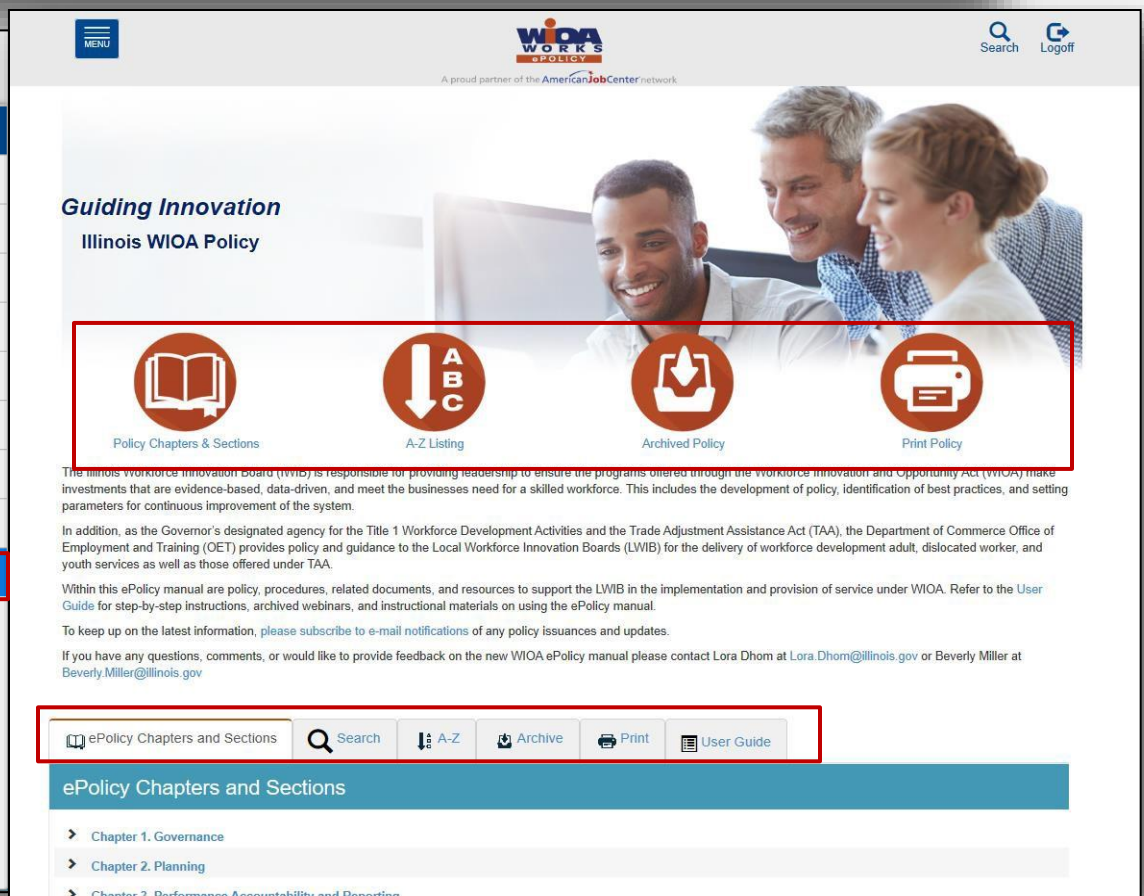
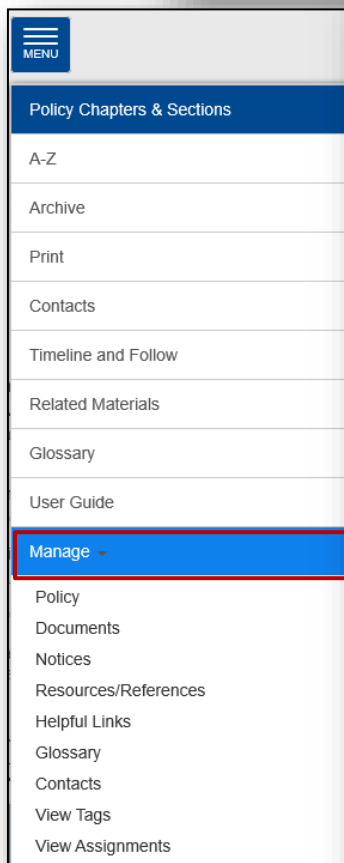
## How is WIOA ePolicy Organized?

The main navigation includes:

**Menu** allows customers to navigate each section of the WIOA ePolicy manual and provides approved Commerce staff access to Manage the WIOA ePolicy.

**Search** allows customers to lookup policies and documents by keywords or characters.

**Login** allows authorized partners, whom have access to WIOA ePolicy management tools, to manage the site's policies and documents.





## WIOA ePolicy Sections

### Overview

**A-Z** listing allows users' access to policies alphabetically by topic.

**Archive** offers users the option to review outdated policies by date and title.

**Attachments** offers users the option to search attachments that have been added to a specific section of the policy.

**Contacts** provide users with appropriate contact information, to delegated Commerce staff, for questions regarding policies and assignment areas.

**Forms & Instructions** are fillable documents required per a specific section. Instructions provide needed information for completing a form.

**Glossary** provides definitions on specific terms used within WIOA ePolicy.

**Notices** offers users the option to search notices that have been added to a specific section of WIOA ePolicy.

**Policy Chapters & Sections** allow users to browse policy by chapters and sections.

**Print** provides users the option to print by Table of Content Only, Chapters, or Sections.

**Related Materials** directs users to a page where they can search and view Attachments, Form & Instructions, Templates, Notices, Resources/References, or the Document Archives.

**Tags** are keywords added by policy managers to identify specific topics.

**Templates** are sample documents available as an option for designated sections.

**Timeline and Follow** provides updates when policies and documents are added or updated.

**User Guide** provides an overview of the WIOA ePolicy and how to explore the ePolicy manual.

### Adding and Editing Policy

1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Login to your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **Policy**.

### Adding Policy

1. Select the **Chapter/Section** to add the policy, then select the button to **Add a Sibling After** or **Add Child Under**.  
(See screenshot on page 6 for button definitions.) For example: To add Chapter 3, Section 2 > Select Chapter 3, Section 1 and select **Add Sibling After**.
2. Add **Section Title\***.
3. Add **Effective Date\***.



4. Add **Expiration Date** (if needed).
5. Add **Policy Text\***.
  - a. If adding a Chapter, it is required to enter an **Overview\***.
6. To reserve the Chapter/Section, check the **Create Reserved Branch** box then select **Add Branch**.

## Editing Policy

1. Select the **Policy Chapter/Section** to edit.
2. From the Details tab:
  - a. Update the **Section Title\***.
  - b. Manage the **Effective Date\*** and **Expiration Date** of the policy.
  - c. Add Tags by inputting the tag text and selecting **Add Tag**.
3. From the Overview tab:
  - a. Update the Overview\* text.
4. From the Policy tab:
  - a. Update Policy Text\* if needed.
5. From the Docs tab:
  - a. Attach Documents:
    - Select **File**.
    - Add a **Title\***.
    - Choose the document **Type\***.
    - Select **Link Document**.
6. From the Notices tab:
  - a. Attach Notices:
    - Select **File**.
    - Add a **Title\***.
    - Choose the **Type\***.
    - Select **Link Notice**.
7. From the Resources/References tab:
  - a. Attach Resources/References:
    - Select **Resources/References**.
    - Choose the **Name** of the Resource or Reference from the list.
    - Choose the **Type\***.
    - Select **Link Resources/References**.
    - Select **X** to remove Resource/Reference.
8. From the Glossary tab:
  - a. Scan for glossary terms and apply them to policy text:
    - Select **Scan**.
    - Select **Apply**.
    - Select **Clear** to clear glossary term from the policy.
    - Select **X** to remove glossary term.
9. From the Contact tab:
  - a. Identify the contact for the policy:
    - Select **User**.
    - Select the **Name** of the contact for this policy.
    - Select **Link Contact**.
    - Select **Clear** to clear the contact from the policy.
    - Select **X** to remove a contact.
10. After making necessary updates, select **Publish** to make these changes public or select **Save Draft** to save updates.



- a. The **Update Version & Timeline Notification** checkmark is marked by default – By keeping this box checked a new version will be created, revisions show on users’ timeline, and updates are emailed to subscribers.
- b. To update the policy without creating a new version, uncheck the default check box and select **Update Timeline Notification** – By using this option no new version will be created, but the revisions will show on users’ timeline and updates are emailed to subscribers.

11. To rescind a section of the policy, select **Rescind**.

The screenshot shows the 'Manage Policy' interface. On the left, a list of chapters is displayed: Chapter 1. Governance, Chapter 2. Planning, Chapter 3. Performance Accountability and Reporting, Chapter 4. Service Delivery, Chapter 5. Program Eligibility, Chapter 6. Program Funding, Chapter 7. Program Services, Chapter 8. Administration and Financial Management, Chapter 9. Rapid Response, Chapter 10. Methods of Administration, and Chapter 11. Trade Adjustment Assistance. A red arrow labeled 'Sibling' points to the 'Move' icon next to Chapter 1. Another red arrow labeled 'Child' points to the 'Move' icon next to Chapter 2. A 'Hide' button is visible above the list. On the right, the 'Governance' section details are shown, including: Chapter: 1 Section: 1, Revision Date: 6/20/2017 4:12:04 PM, Published Date: 6/20/2017 4:12:04 PM, Version: 1, Status: Current, and a 'Rescind' button. There are also checkboxes for 'Update Timeline Notification' (unchecked) and 'Update Version & Timeline Notification' (checked), along with 'Save Draft' and 'Publish' buttons. Below this, there are tabs for 'Details' and 'Overview', and a 'Section Title\*' field containing 'Governance'. The 'Effective Date\*' field contains '12/1/2014'. The 'Expiration Date' field is empty. A 'Comments' section is at the bottom. On the right side of the details, there is a 'Tags' section with an 'Input Tag' field and an 'Add Tag' button. A note explains that tags are added by typing into the box and hitting 'Add Tag', and that tags are not added to the policy until published.

## Adding and Editing Documents

1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Login to your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **Documents**.

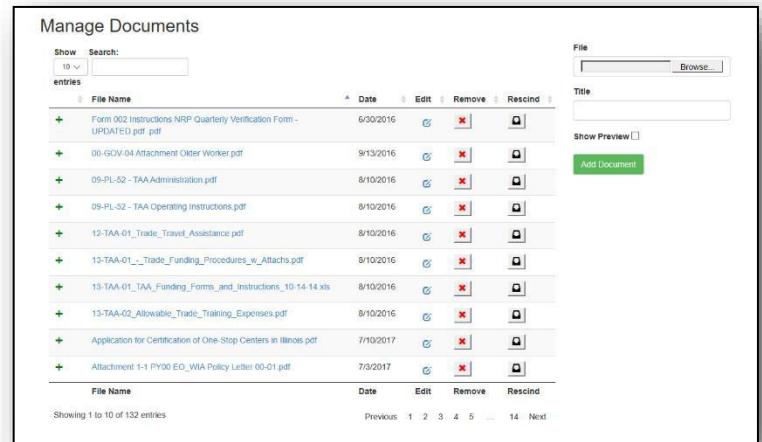
## Adding Documents

1. Select the **Choose File/Browse** button on the right side of the screen.
2. Browse your computer to select a file to **Open**.
3. Add the document **Title**.
4. Select **Show Preview** to give users the ability to preview documents before downloading them.
  - a. Note: A fillable PDF document cannot be previewed, as the previewer cannot support them.
5. Select **Add Document**.



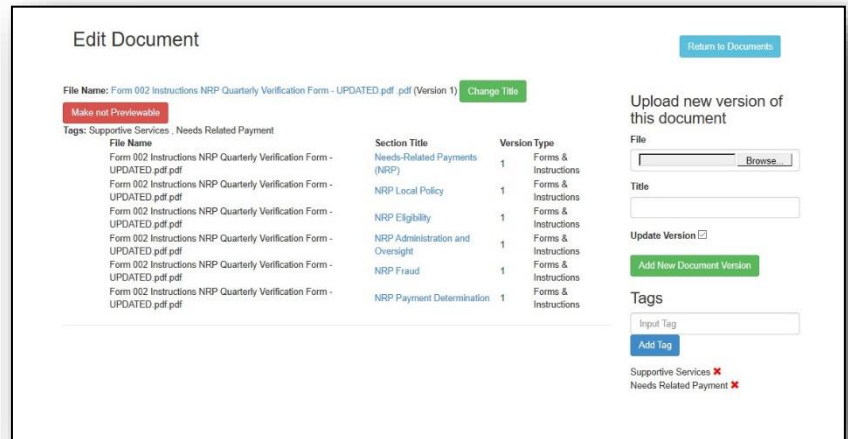
## Managing Documents

- To view an existing Document:
  - Find the document to view in the list.
  - Select the **File Name** and the document will open.
- To view the history of a document:
  - Find the document to view in the list.
  - Select the **+** sign next to the file name and the list of policies will open.
- Select the **Edit** button next to a document to make edits.
- Select **X** to remove a document.
- Select **Rescind** to rescind a document.



## Editing Documents

- When editing a document, use the **Change Title** button to update the document's title.
- Use the **Make Previewable** or **Make Not Previewable** button to edit the document to either allow or shut off the preview function.



## Uploading New Versions

- When editing a document, select the **Choose File/Browse** button on the right side of the screen.
- Browse your computer to select the **File**.
- Type the document's **Title**.
- To create a new version of the document, leave the **Update Version** box checked. To leave the version number the same, uncheck the **Update Version** checkbox.
- Select the **Add New Document Version** button.

## Tagging Documents

- When editing a document, type in a related tag.
- Select **Add Tag**.
  - Repeat for additional tags.

## Returning to Documents List

- When editing a document, select **Return to Documents** button to Return to the Documents listing.

## Adding and Editing Notices

- Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
- Login to your Illinois workNet account.



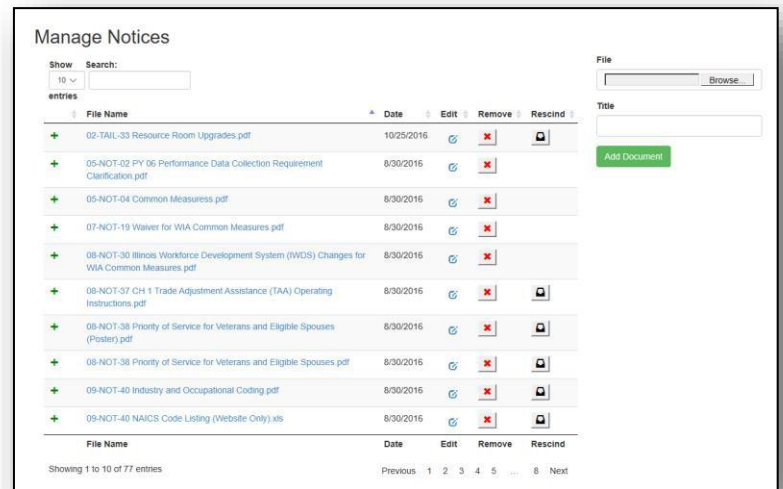
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **Notices**.

## Adding Notices

1. Select the **Choose File/Browse** button then select the file to upload.
2. Add a **Title** to the document.
3. Select **Add Document**.

## Managing Notices

1. To view an existing Notice:
  - a. Find a Notice to view in the list.
  - b. Select the **File Name** and the document will open.
2. To view the history of a notice:
  - a. Find the notice to view in the list.
  - b. Select the **+** sign next to the file name and the notice's history will open.
3. Select **X** to remove a notice.
4. Select **Rescind** to rescind the notice.
5. Select the **Edit** button next to the notice to edit.



## Editing Notices

1. When editing a notice, use the **Change Title** button to update the notice's title.
2. Use **Make Previewable/Make Not Previewable** to edit the notice to either allow or shut off the preview function.

## Uploading New Versions

1. When editing a notice, select the **Choose File/Browse** button on the right side of the screen.
2. Browse your computer to select the **File**.
3. Type in the Notice **Title**.
4. To create a new version of the Notice, leave the **Update Version** box checked. To leave the version number the same, uncheck the **Update Version** checkbox.
5. Select the **Add New Document Version** button.

## Tagging Notices

1. When editing a notice, type in the **Related Tag**.
2. Select **Add Tag**.
  - a. Repeat for additional tags.

## Returning to Notices List

1. When editing a notice, select **Return to Notices** to return to the notices listing.





## Adding and Editing Resources and References

1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Login to your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **Resources/References**.

## Adding Resources and References

1. Enter the Resource's/Reference's **Title**.
2. Enter the **Resources/References Text**.
  - a. To add a link, highlight the text needing to be linked and select the **Link** button.
  - b. Paste the **URL**.
  - c. Select **OK**.
3. Select **Add Resources/References**.

## Managing Resources and References

1. To view an existing resource/reference:
  - a. Find the resource/reference to view in the list.
  - b. Select the **File Name** and the resource/reference will open.
2. To view the history of a resource/reference:
  - a. Find the resource/reference to view in the list.
  - b. Select the **+** sign next to the file name and the history of that resource/reference will open.
3. Select **X** to remove a resource/reference.
4. Select the **Edit** button next to the resource/reference to edit.

## Editing Resources and References

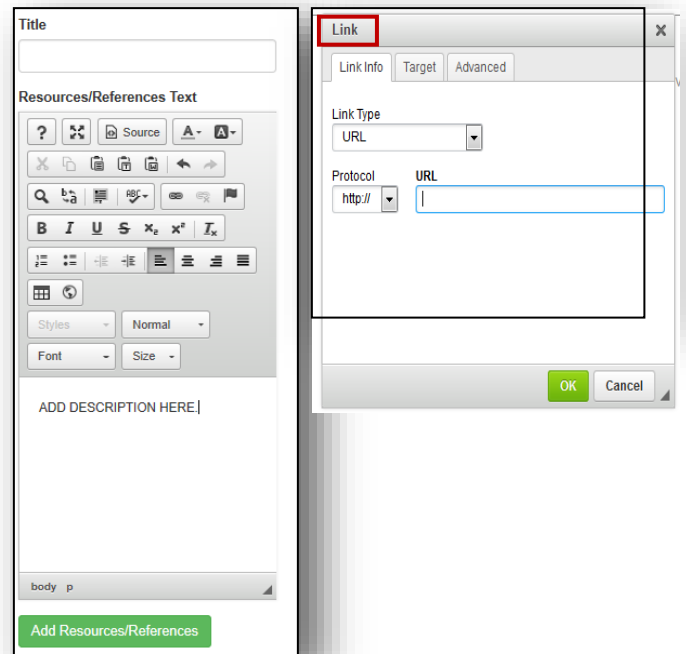
1. When editing a resource/reference, use the **Title** text box to change the Title.
2. Use the **Reference** text box to change the resource/reference information.
3. Select **Save** after changes are made.

## Tagging Resources and References

1. When editing a resource/reference, type in **Related Tag**.
2. Select **Add Tag**.
  - a. Repeat for additional tags.

## Adding and Editing Helpful Links

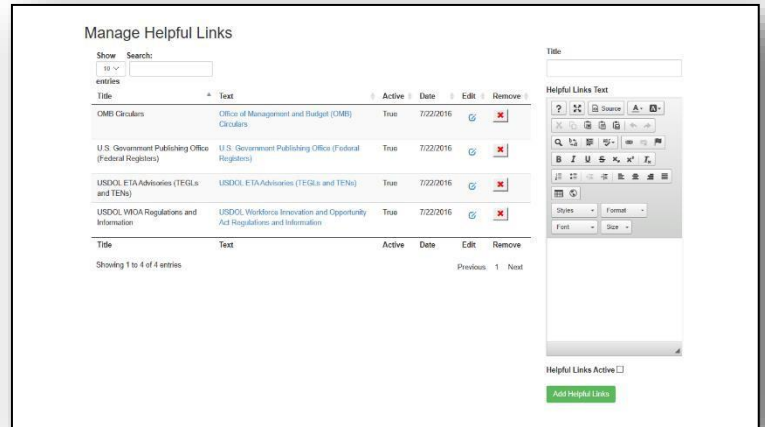
1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Login to your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **Helpful Links**.





## Adding Helpful Links

1. To upload a new helpful link:
  - a. Enter helpful link **Title**.
  - b. Type in the **Helpful Links Text** describing the purpose of the link.
    - To add a link, highlight the text to link and select the **Link** button.
    - Paste in **URL**.
    - Select **OK**.
  - c. Select the checkbox next to **Helpful Links Active** to activate the helpful link.
  - d. Select **Add Helpful Links**.



## Managing Helpful Links

1. To view existing helpful links:
  - a. Find the helpful link to view in the list.
  - b. Select the **File Name** and the helpful link will open.
2. Select **X** to remove a helpful link.
3. Select the **Edit** button next to the helpful link to edit.

## Editing Helpful Links

1. Make changes to the **Title** or helpful link **Text**.
2. Select **Is Active** to make the helpful link active.
3. Select **Save**.
4. Use the **Return to Helpful Links** button to get back to the list of helpful links.

## Adding and Editing Glossary Terms

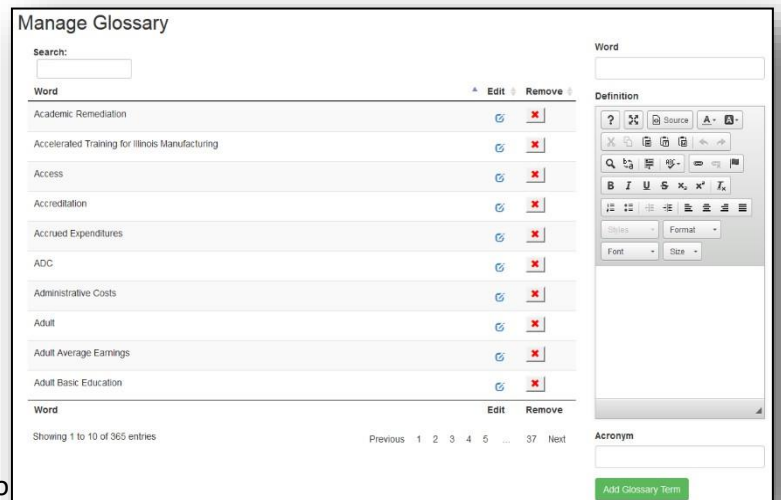
1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Login to your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **Glossary**.

## Adding Glossary Terms

1. To add a new glossary term:
  - a. Type the **Word** for the new term.
  - b. Type in the **Definition**.
    - If necessary, add related **Acronym**.
  - c. Select **Add Glossary Term**.

## Managing Glossary Terms

1. Select **X** to remove a glossary term.
2. Select the **Edit** button next to the glossary term to





## Editing Glossary Terms

1. To edit an existing Glossary term:
  - a. Search for a specific term and select the **Edit** button within the list.
  - b. Make the necessary updates to the **Word**, **Definition**, or **Acronym**.
  - c. Select **Update Glossary Term**.
  - d. Use the **Return to Glossary** button to get back to the list of glossary terms.

## Adding and Editing Contacts

1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Login to your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **Contacts**.

## Adding Contacts

1. Select **New Contact**.
  - a. Enter text for the following fields:
    - **First Name\***.
    - **Last Name\***.
    - **E-Mail\***.
    - **Title**.
    - **Organization**.
    - **Additional Contact(s)**.
    - **Address**.
    - **City\***.
    - **State\***.
    - **Zip**.
  - Select **Create Contact**.

The screenshot shows a 'New Contact' form with the following fields and labels:

- First Name\*** (input field)
- Last Name\*** (input field)
- E-Mail\*** (input field)
- Title** (input field)
- Organization** (input field)
- Address** (input field)
- Address 2** (input field)
- City\*** (input field)
- State\*** (input field)
- Zip** (input field)
- Additional Contact(s) (separate multiple email addresses with a semicolon)** (input field)

A green **Create Contact** button is located in the top right corner of the form.

## Managing Contacts

1. Select **X** to remove a contact.
2. Select the **Edit** button next to the contact to edit.

## Editing Contacts

1. To edit an existing contact:
  - a. Search for a contact to edit and select the **Edit** button next to a contact's information.
  - b. Make the necessary changes to the contact's information.
  - c. Select **Update Contact**.
  - d. Use the **Return to Contacts** button to go back to the list of contacts.

## Adding Phone Numbers

1. When in editing a contact:
  - a. Use the **Add Phone** button to add a phone number:
    - **Phone\***.
    - **Ext.**



- **Primary** (Select the radio button to identify if it is the primary phone number).
  - Use the **X** to remove a phone number.
- b. After updating the phone number information select **Update Contact**.

## Adding Assignments

1. When editing a contact:
  - a. Input in the **Assignment text** in the Assignment text box.
  - b. Select **Add Assignment**.
2. To remove an assignment that has been added select **X**.

## View and Remove Tags

1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Log into your Illinois workNet Account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **View Tags**.

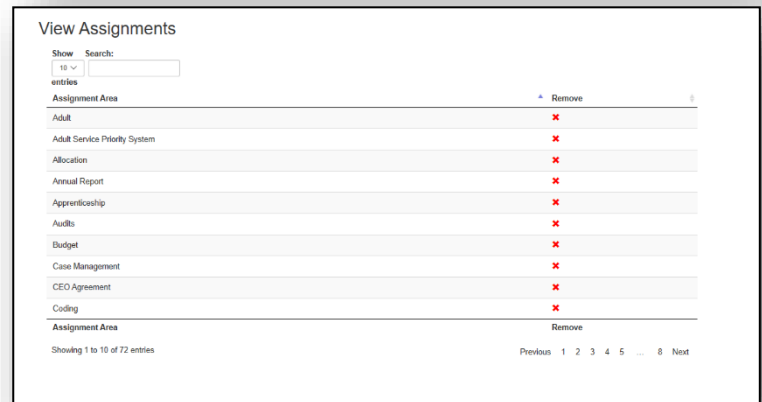


## Removing Tags

1. To remove an existing tag, search for the specific tag and select **Remove**.

## View and Remove Assignments

1. Go to [www.illinoisworknet.com/ePolicy](http://www.illinoisworknet.com/ePolicy).
2. Login to your Illinois workNet account.
3. Select **Menu** on the top left of the header.
4. Select **Manage**.
5. Select **View Assignments**.



## Removing Assignments

1. To remove an existing assignment, search for a specific assignment and select **Remove**.