

IEP Modifications

For all IEP Modifications, the career planner will do the following:

Complete the **Individual Employment Plan (IEP) Modification Form Commerce/Trade Form #014a (IEP Modification Form)**.

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 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. 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**

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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
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 that details all information related to the IEP modification that is being requested including any updated amounts and reasons for the modification.

Click **Save and Return**.

The screenshot displays 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 features a yellow informational message about Case Note completion. Below this is the 'Add Case Note' form for staff member 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 located at the bottom of the form.

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

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), "FAQs", and "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 that details all information related to the IEP modification that is being requested including any updated amounts and reasons for the modification.

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: "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), 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.

Update the IEP Status.

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

IWDS Illinois Workforce Development System **Case Management**

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

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Exit

- [Exit Summary](#)
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Click on **View** beside the **IEP Status Record**.


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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"/>	12/15/2021	12/15/2021	Payable Training Interruption		Sheila Sloan	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	Sheila Sloan	12/15/2021
<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** and update the **IEP Amount Approved**, if appropriate in IWDS.

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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: IEP
Entry Date: 02/22/2019
Status Start Date:
Status End Date:

Changes to Comments or IEP Amount Approved require DCEO Approval

Comments:

12/15/2021 - IEP Modification to (enter reason for mod). See case note dated 12/15/21 for details.

IEP Amount Approved:

Created By: Sheila Sloan **Date Created:** 02/22/2019
Last Updated By: Sheila Sloan **Date Last Updated:** 11/30/2021

Approval Type	Approver	Approved/Denied Date	Approval Status	Previous IEP Amount
IEP Revision	Sheila Sloan	12/02/2021	Approved	
Original	Sheila Sloan	02/25/2019	Approved	

Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
There is nothing to display.					

Upload the IEP Modification Form (#014a), Waiver (#003), Training Enrollment Form (#006), Transportation/Subsistence Assistance Form (#005), Program Tracking Form (#006d or #006e), RTAA Application (#011), and any other relevant documents in IWDS.

To upload documents in IWDS, click on **List All Documents** under the **Profile** section on the **Application Menu**. Make sure you are on the correct application for the participant (WIOA or TAA).

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

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Exit

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Click **Add Document**.

IWDS Illinois Workforce Development System **Case Management**

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

	Doc ID	Screen	Document Type	Date Stored	Date Reviewed	Reviewed By
<input type="button" value="Remove"/>	71	Application Menu	Form #014 DCEO/Trade Trade Individual Employment Plan	Tue May 25 13:25:10 CDT 2021		

Click **Browse** to search for the document to upload. Once you find the file, double click the document or select it and click **Open**.

Then select the **Type** from the drop down options. There should be an option to select any of the Trade forms.

Each document can be uploaded separately or combined into a single document. If you upload the documents as one single document, select **Form #014 DCEO/Trade Trade Individual Employment Plan** as the **Type**. If you upload the documents as separate documents, select the appropriate name from the drop down options for **Type**.

IWDS Illinois Workforce Development System **Case Management**

Upload Document

Path: Browse...

Type:

- Form #001 2021R Trade Benefits Rights and Obligations
- Form #002 DCEO/Trade Trade Application
- Form #003 DCEO/TAA 2002 TAA Illinois Waiver from Training
- Form #003 DCEO/TAAEA 2011 TAAEA Illinois Waiver from Training
- Form #003 DCEO/TAARA Illinois Waiver from Training
- Form #003 DCEO/TGAAA 2009 TGAAA Illinois Waiver from Training
- Form #003 2021R Illinois Waiver from Training
- Form #003a DCEO/Trade Trade Waiver Termination Letter
- Form #003b DCEO/Trade Trade Waiver Non-Compliance Letter
- Form #003c DCEO/Trade Trade Potential Suspension Letter
- Form #003d DCEO/Trade Trade Waiver Revocation Letter
- Form #003e DCEO/Trade Trade Waiver from Training Fact Sheet
- Form #004 DCEO/TAA TAA Bona Fide Application for Training
- Form #004 DCEO/TAA2014R Bona Fide Application for Training
- Form #004 2021R Trade Bona Fide Application for Training
- Form #005 DCEO/Trade Eligibility Determination for Trade Transportation/Subsistence Assistance
- Form #005 DCEO/Trade Eligibility Determination for Trade Travel Assistance
- Form #006 DCEO/Trade Verification of Trade Training Enrollment
- Form #006 DCEO/TAAEA Verification of TAAEA Training Enrollment
- Form #006 DCEO/TAA2014R Verification of Training Enrollment
- Form #006 DCEO/TGAAA Verification of TGAAA Training Enrollment
- Form #006a DCEO/Trade Bi-Weekly Verification of Trade Training Attendance
- Form #006b DCEO/Trade Trade Training Requirements Fact Sheet
- Form #006c DCEO/Trade Training Benchmark Warning Letter
- Form #006c DCEO/TAAEA TAAEA Training Benchmark Warning Letter
- Form #006d DCEO/Trade Training Program Tracking Form
- Form #006e DCEO/Trade Training Program Course Tracking Form
- Form #007 DCEO/Trade Trade Individual Training Account (ITA) Projection
- Form #008 DCEO/Trade Trade On-the-Job Training OJT Agreement
- Form #009 DCEO/Trade Trade On-the-Job Training OJT Invoice

Send an email request to state merit staff for approval by forwarding the last state merit staff approval email and use the following format:

Email Subject Line: IEP modification approval request for (reason for modification) – “Participant First Name Initial and Last Name” – LWIA XX

Body of Email:

Can we have an IEP modification approval for (reason for modification) for:

Include the items below that are applicable for the modification. The justification must always be included:

Participant Name:

Current Training Institution:

New Training Institution:

Current Training Program:

New Training Program:

Current Total Training Weeks:

New Total Training Weeks:

Start Date of Current Training Program:

Start Date of New Training Program:

Planned End Date of Current Training Program:

Planned End Date of New Training Program:

New Planned End Date of Current Training Program:

Current Training Cost:

New Training Cost:

Current Transportation/Subsistence Cost:

New Transportation/Subsistence Cost:

Current Approved IEP Amount:

New IEP Amount:

Final IEP Amount:

Justification:

State merit staff will do the following:

- 1) Review the email, IWDS entries, and uploaded documents to ensure all entries are made as required and all documents are complete.
- 2) If issues are found, state merit staff will email the career planner and inform him/her of the issues that need addressed.
- 3) Once the issues have been addressed, the career planner will forward back the email from state merit staff and note that issues have been addressed.
- 4) State merit staff will review corrections.
- 5) Once all issues have been corrected, state merit staff will approve all service and status records and forward the email chain to the career planner to inform them of the approval.
- 6) If approval is not possible and the request is denied, state merit staff will direct the career planner on the next steps to take.

In addition to the steps above, complete the following steps for each type of IEP modification:

To add additional training services:

- 1) Add a new **Training Service Record** for the specific type of training being added. Find the specific instructions for the type of training being added in the **Occupational Skills Training Instructions, Pre-Requisite Training Instructions, Remedial Training Instructions, or Work-Based Training Instructions** documents.

For ending a training service:

- 1) End the **Training Service Record(s)** as **Successful/Unsuccessful Completion** on the date of last documented attendance.
- 2) End the **Travel and/or Subsistence Service Record(s)** as **Successful Completion** on the date of last documented attendance, if applicable.
- 3) For participants who are enrolled in a training program with multiple levels of achievement or sections (ESL, ELA, SLL) who complete the state merit staff approved portion of the training, but do not continue to all potential levels or segments available in the program, the training record should be marked as a successful completion. This is the case even if the actual end date differs slightly from the planned end date. **ESL, ELA, SLL training will be approved based on semester increments.** The career planner must monitor the progress of the participants in these types of training and submit modifications timely.

For date extensions:

- 1) Update the **Training Service Record Planned End Date**.
- 2) Update the Benchmark for On Track to Complete Within the Timeframe with an outcome of **Not Met – Modification** and provide a justification for the date extension.

Switching to a different training program:

- 1) Update the Benchmark for On Track to Complete Within the Timeframe with an outcome of **Not Met – Modification** and provide a justification for the date extension.
- 2) Complete a new **Trade Verification of Trade Training Enrollment Commerce/Trade Form #006 (Training Enrollment Form)**.
- 3) Complete a new **Transportation/Subsistence Form (#005)** to determine eligibility for transportation-subsistence assistance including Google Map printout.
- 4) Complete a new **Tracking Form (#006d or #006e)**.
- 5) Enter a **Case Note** detailing the six criterion for approval of training for the new training program.
- 6) Enter the new **Training Service Record**.
- 7) Enter the **Travel in Training or Subsistence in Training Service Record**, if a service record for travel or subsistence is not already active.

- 8) Enter **Part Time/Distance Learning Indicator**, if an indicator for part-time or distance learning is not already active.
- 9) **Following state merit staff approval** of the above, the career planner will:
 - a) End the existing **Training Service Record**.
 - b) End the **Travel in Training** or **Subsistence in Training Service Record**, if eligibility for this service ends with the new training program.

For changes in cost, update the IEP Amount Approved on the IEP Status Record.

- 1) Complete a new **Transportation/Subsistence Form (#005)** to determine eligibility for transportation-subsistence assistance including Google Map printout, if applicable.
- 2) Enter a new **Travel in Training** or **Subsistence in Training Service Record**, if applicable.
- 3) Update the **Tracking Form**, if applicable.

For changes in full-time/part-time status, update the Part Time indicator.

- 1) Under **Services** in IWDS, the career planner will select **List Part Time/Distance Learning**.
- 2) Select **Part Time** under **Status Type**, enter the date the part-time training begins under **Start Date**, and select **Yes** or **No** under **Status**.

For potential suspension request see the Chapter 9: Potential Suspension Requests (PSR).

For a switch from on-site to online (distance learning):

- 1) Under **Services** in IWDS, the career planner will select **List Part Time/Distance Learning**.
 - a. Select **Distance Learning** under **Status Type**, enter the date the part-time training begins under **Start Date**, and select **Yes** under **Status**.

NOTE: A switch from online (distance) learning to on-site does not require a change in the indicator. Once the indicator has been marked "Yes", it remains that way.

For final cost reconciliation:

- 1) Update the **IEP Status** with a dated comment in the **Comment Box**, enter a **Status End Date** equal to the date of request or later, and update the **IEP Amount Approved**, if applicable.
 - a. Ensure that **IEP Amount Approved** in the **IEP Status Record**, the **IEP Modification Form**, and the **View TAA Cost Reporting Items** all match.
 - b. End all open **Service Records**.

For A/RTAA, see the A/RTAA Instructions document.

For other modifications, contact state merit staff.