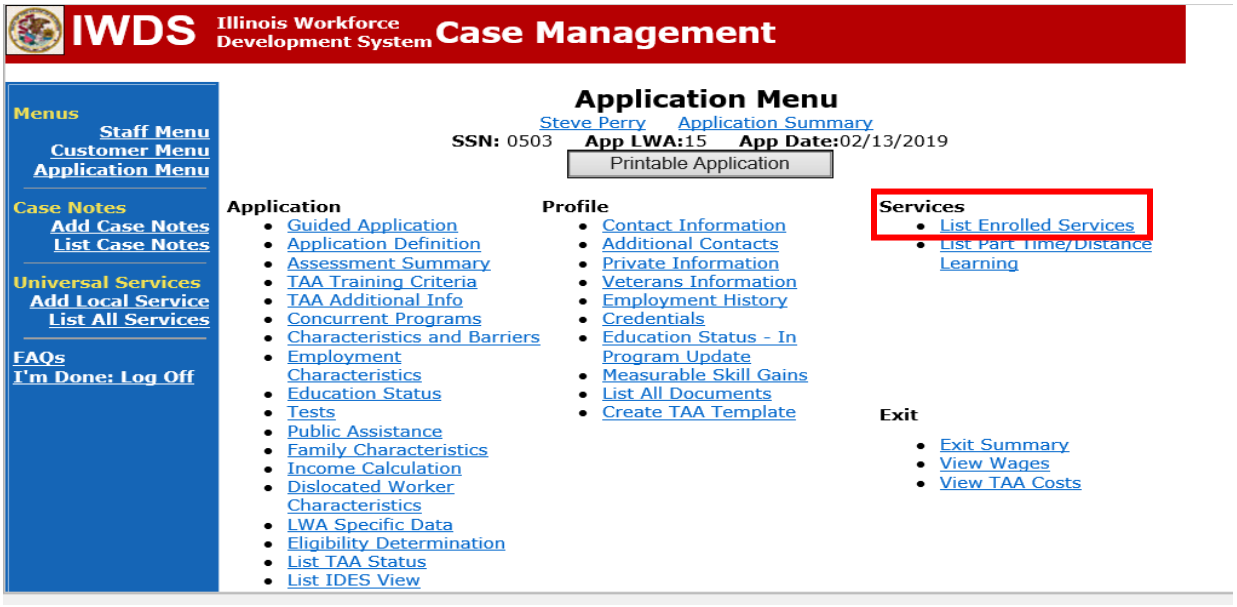
OCCUPATIONAL SKILLS TRAINING

The career planner will do the following for submission of requests to approve Occupational Skills Training:

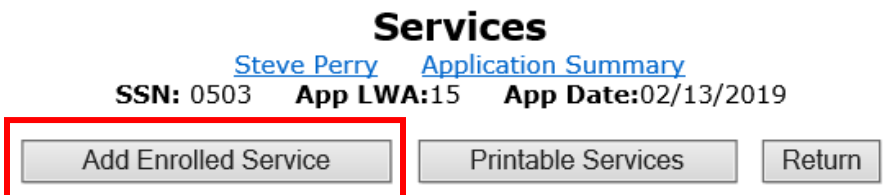
Complete a **Trade Individual Employment Plan Commerce/Trade Form #014 (IEP)**. See the recorded training dated 10/28/21 on Eligibility & Enrollment, Agent/Liable, and 2021R Program Differences and the IEP Form with Instructions for specific instructions on completing the **IEP**.

If this is the initial service (IEP not already state merit staff approved) for the participant:

Enter the **IEP Service Record** by selecting **List Enrolled Services** under the **Services** section on the **Application Menu** on the **TAA Application** for the participant.



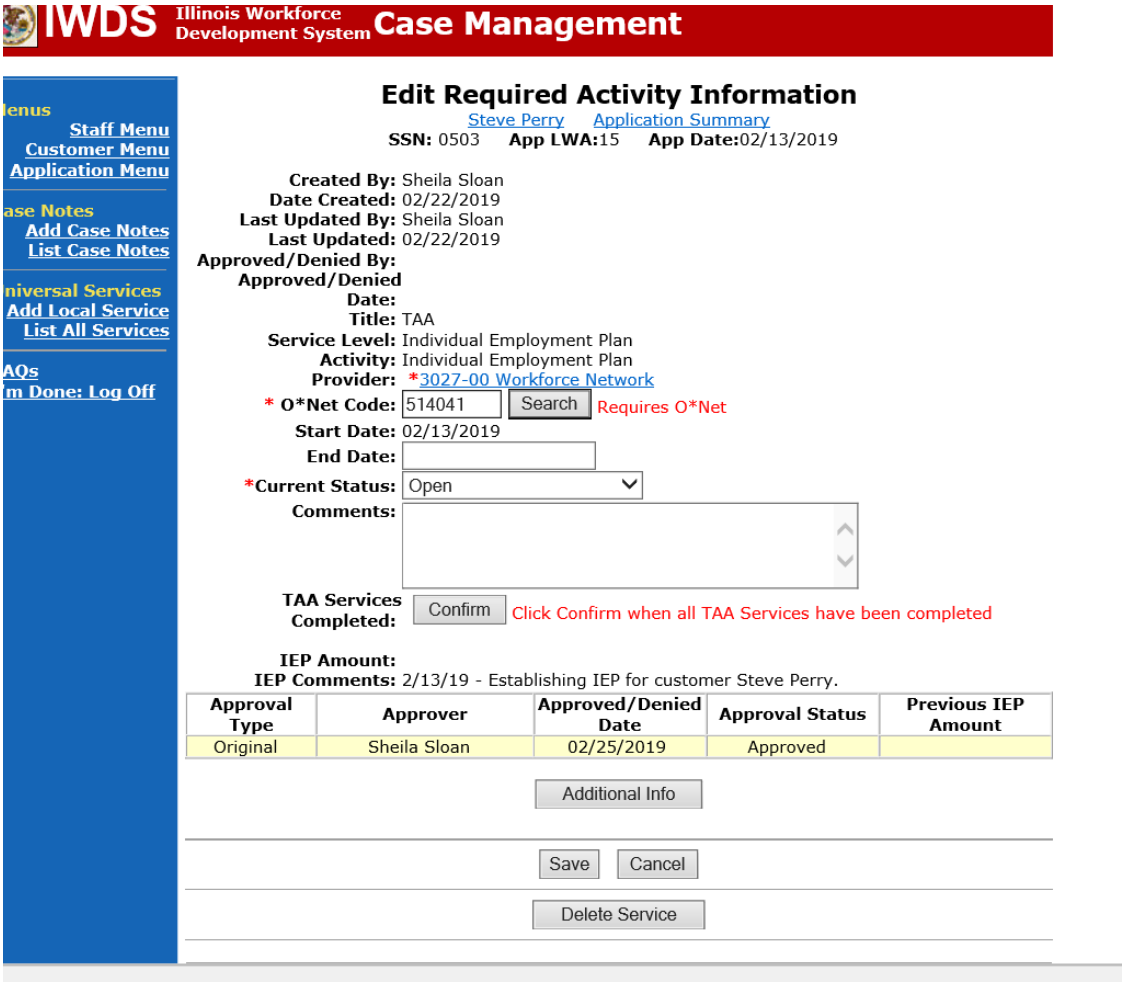
Click **Add Enrolled Service**.



Select **TAA** from the drop down for the **Title**. Then click **Next**.

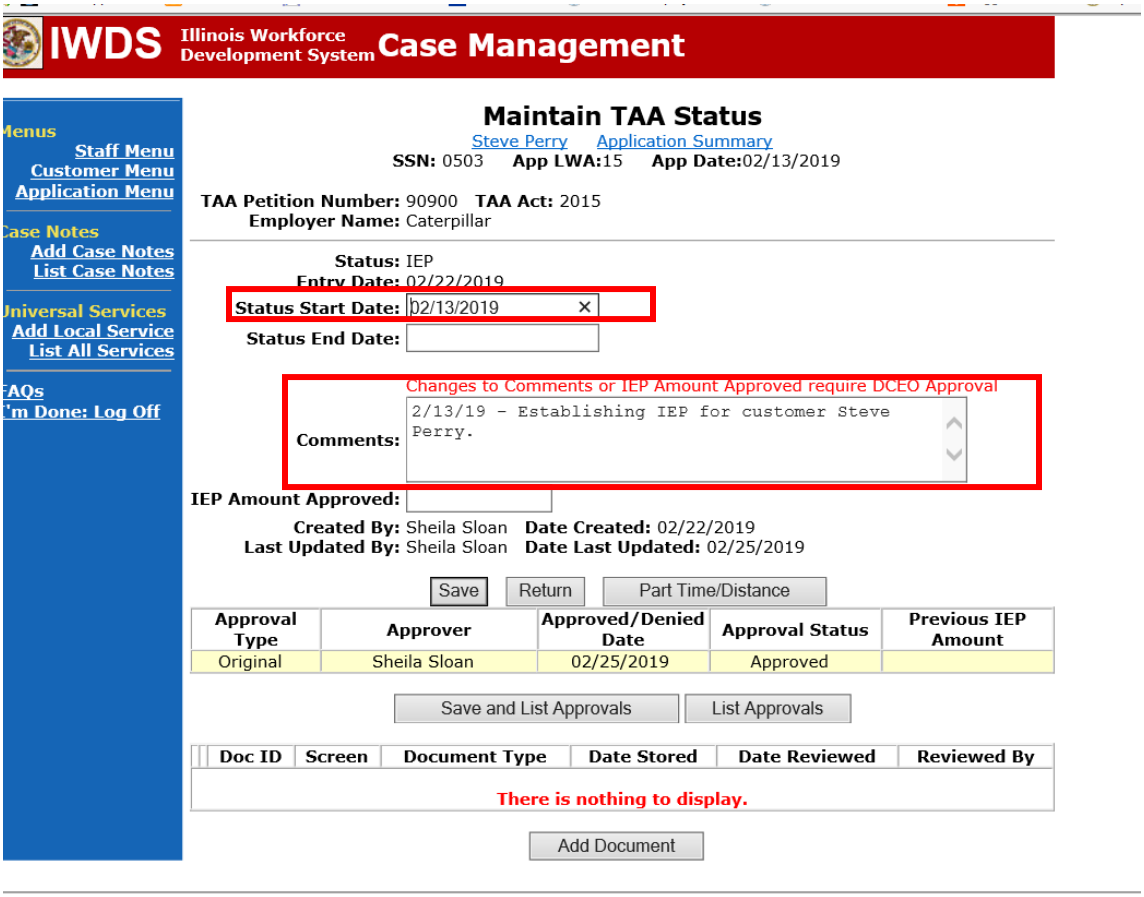
Select **Individual Employment Plan** from the drop down for the **Service Level.**
Enter the **Start Date.**
Click **Next**.

Complete the information on the screen and click **Save**



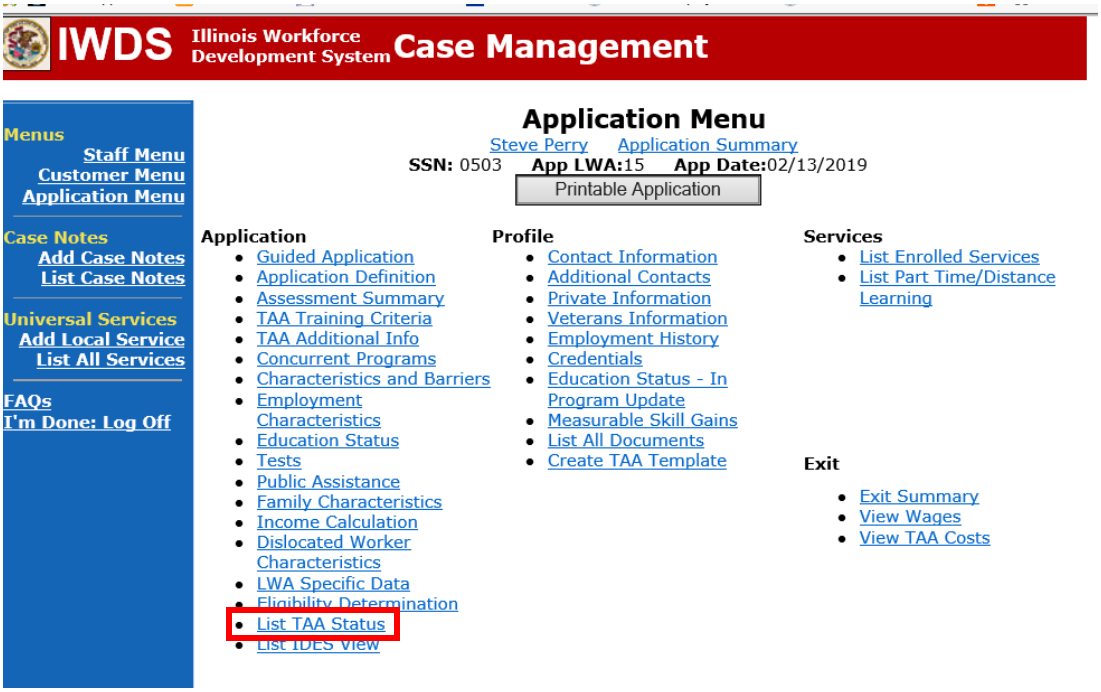
Upon saving the **IEP Service Record**, IWDS will transfer the career planner to the **IEP Status Record** to complete entry.

Complete the **Status Start Date**
Enter a dated comment in the **Comment Box**
Enter an **IEP Amount Approved**, if known.
Click **Save**.

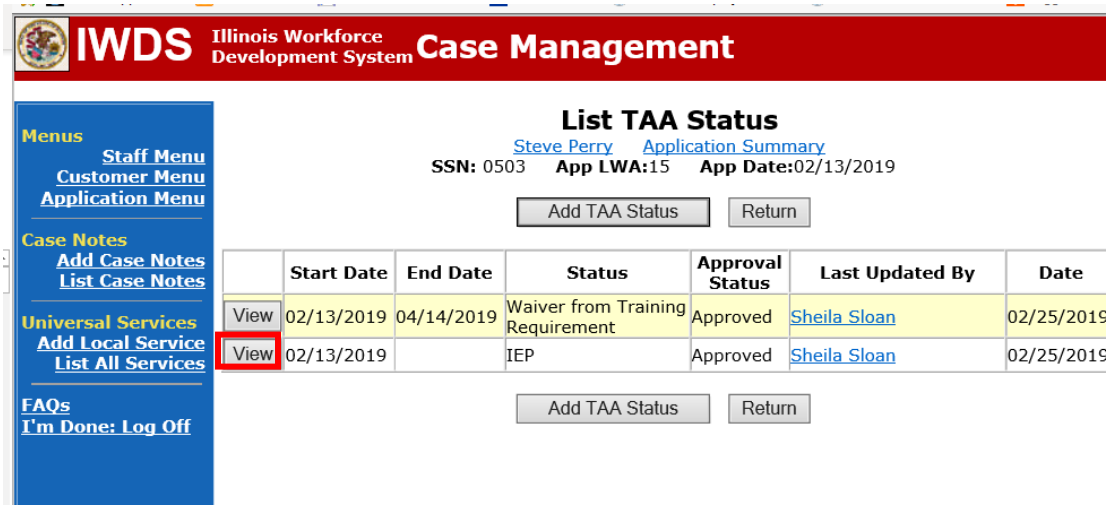


If this is an IEP modification (IEP already state merit staff approved) for the participant:

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

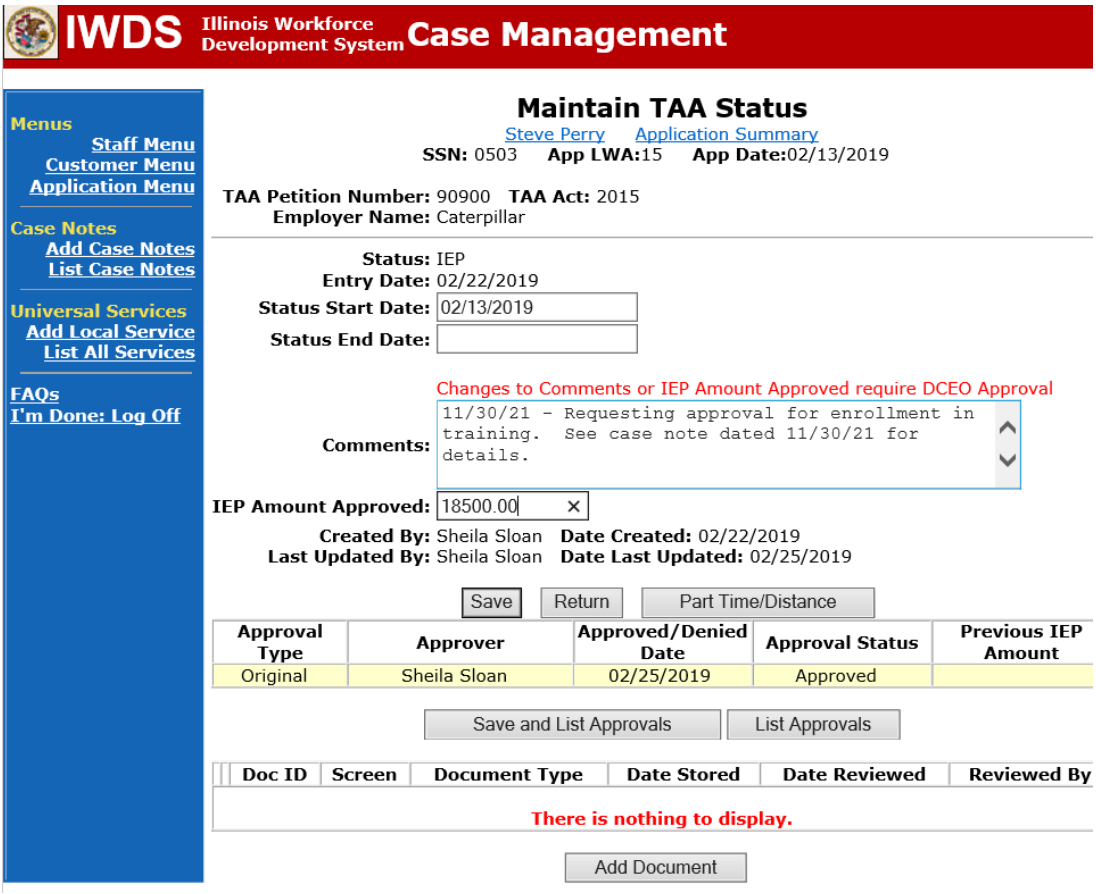


Click on **View** for the **IEP Status Record**.



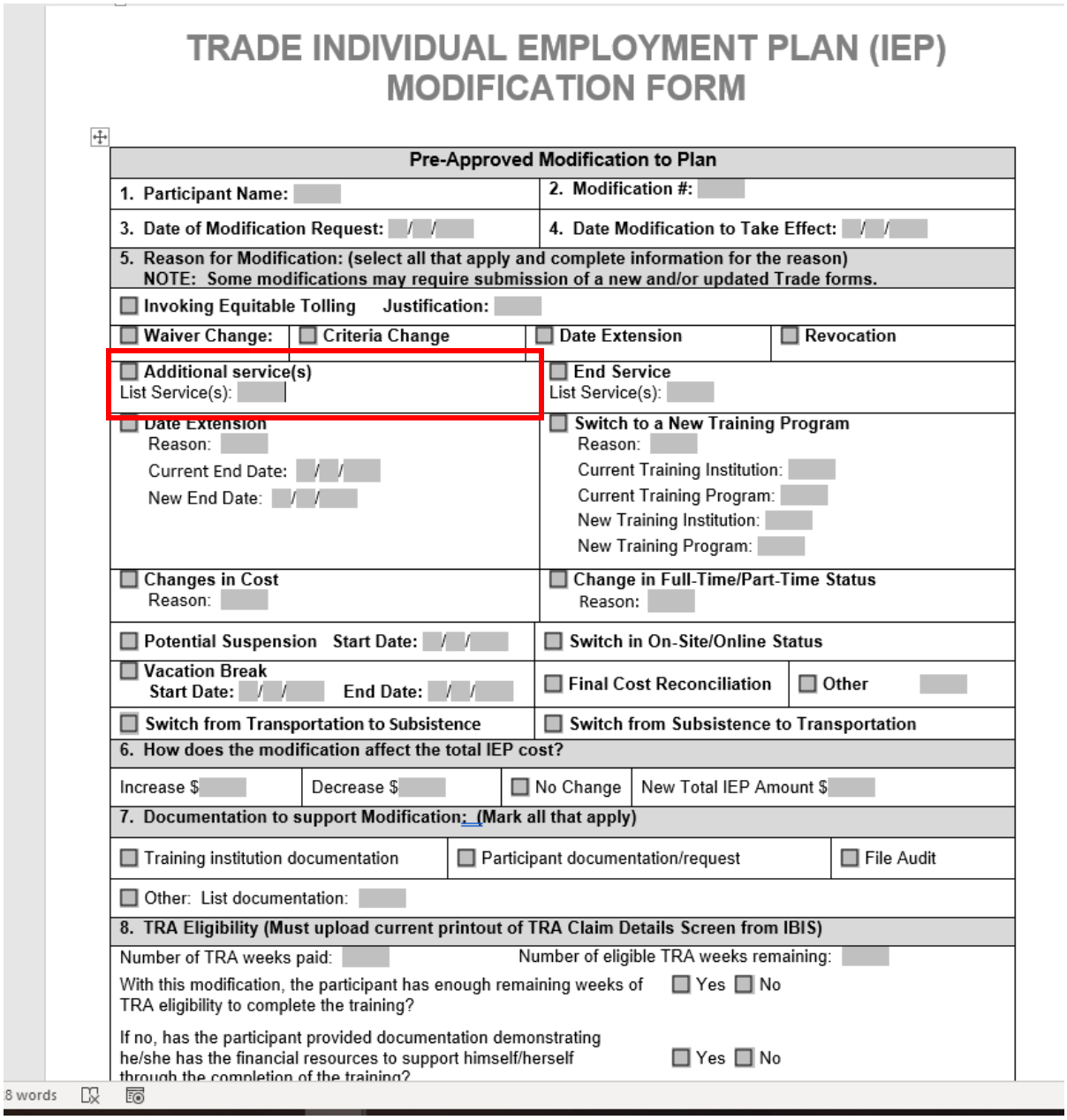
Update the **IEP Status Record** with a dated comment in the **Comment Box** describing the reason for the modification.

Click **Save**.



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

Fill out all necessary information. Mark the **Additional service(s)** and enter **Waiver** in the List Service(s) box.



TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM

Pre-Approved Modification to Plan	
1. Participant Name:	2. Modification #:
3. Date of Modification Request: / /	4. Date Modification to Take Effect: / /
5. Reason for Modification: (select all that apply and complete information for the reason) NOTE: Some modifications may require submission of a new and/or updated Trade forms.	
☐ Invoking Equitable Tolling Justification:	
☐ Waiver Change: ☐ Criteria Change	☐ Date Extension ☐ Revocation
☐ Additional service(s) List Service(s):	☐ End Service List Service(s):
☐ Date Extension Reason: Current End Date: / / New End Date: / /	☐ Switch to a New Training Program Reason: Current Training Institution: Current Training Program: New Training Institution: New Training Program:
☐ Changes in Cost Reason:	☐ Change in Full-Time/Part-Time Status Reason:
☐ Potential Suspension Start Date: / /	☐ Switch in On-Site/Online Status
☐ Vacation Break Start Date: / / End Date: / /	☐ Final Cost Reconciliation ☐ Other
☐ Switch from Transportation to Subsistence	☐ Switch from Subsistence to Transportation
6. How does the modification affect the total IEP cost?	
Increase $ Decrease $ ☐ No Change	New Total IEP Amount $
7. Documentation to support Modification: (Mark all that apply)	
☐ Training institution documentation ☐ Participant documentation/request	☐ File Audit
☐ Other: List documentation:	
8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)	
Number of TRA weeks paid: Number of eligible TRA weeks remaining:	
With this modification, the participant has enough remaining weeks of TRA eligibility to complete the training? ☐ Yes ☐ No	
If no, has the participant provided documentation demonstrating he/she has the financial resources to support himself/herself through the completion of the training? ☐ Yes ☐ No	

Complete a **Trade Verification of Trade Training Enrollment Commerce/Trade Form #006 (Training Enrollment Form)**.

Complete a **Trade Eligibility Determination for Trade Transportation-Subsistence Commerce/Trade Form #005 (Transportation-Subsistence Form)** along with a Google Maps printout supporting the mileage distance between the residence and the training institution site, to determine eligibility for transportation-subsistence assistance.

Complete a **Trade Training Program Tracking Form Commerce/Trade Form #006d (Tracking Form)** or **Trade Training Program Course Tracking Form Commerce/Trade Form #006e (Tracking Form)**, as appropriate.

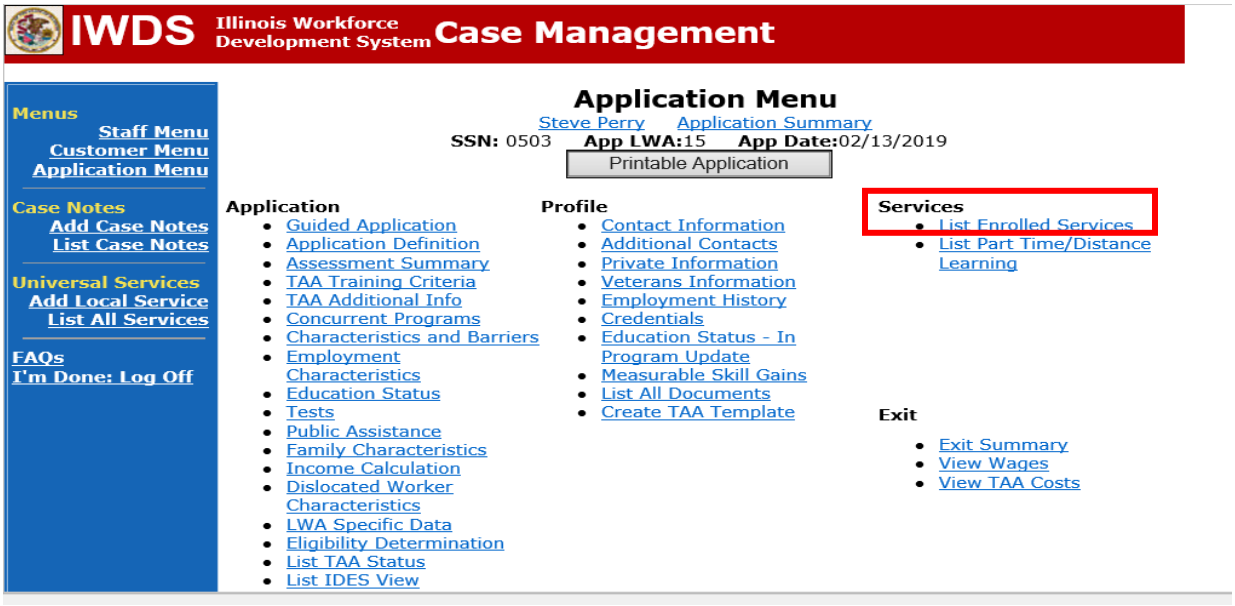
Add **Case Management Services** in IWDS on the WIOA and Trade applications based on the following:

For participants covered by certifications numbered up to 97,999:

Trade Application:

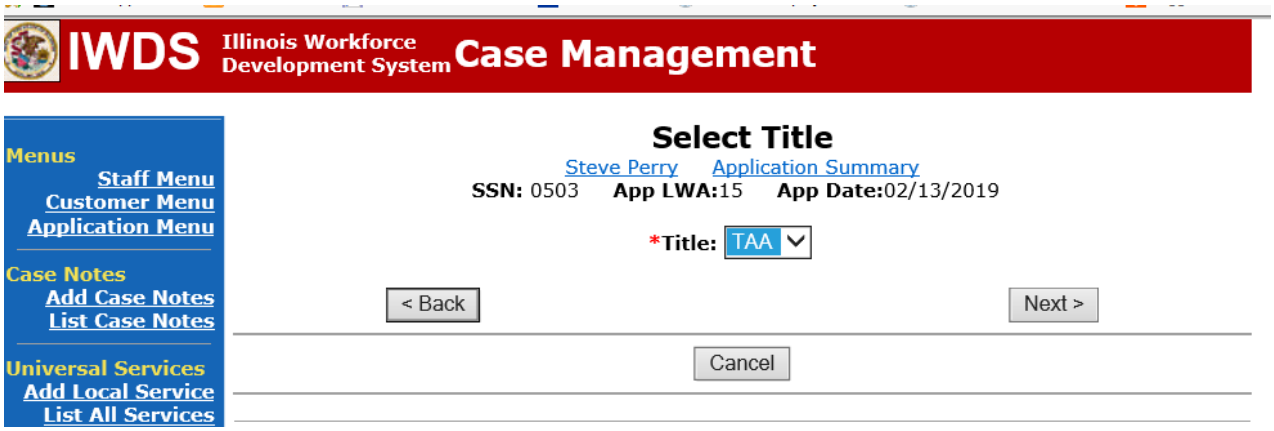
Trade Application Entry (Initial Trade Case Management Service)

Click **List Enrolled Services** on the **Application Menu** on the **TAA Application** for the participant.



Click **Add Enrolled Service.**

Select **TAA** for the Title from the drop down list.
Click **Next**.
Select **TAA** for **Title**.
Click **Next.**



Select **Employment and Case Management** for the **Service Level** from the drop down list.
Enter **Start Date**. (Date of entry or date service first provided).
Click **Next**.

IWDS
Illinois Workforce Development System
Case Management
Menus
Staff Menu
Customer Menu
Application Menu
Case Notes
Add Case Notes
List Case Notes
Universal Services
Add Local Service
List All Services
FAQs
Select Service Level and Start Date
Steve Perry
Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019
Title: TAA
*Service Level: Employment and Case Management
*Start Date: 11/1/2021
< Back
Next >
Cancel

Complete all required fields:

Search Providers – Click on the **Search Providers Button** and see instructions below.

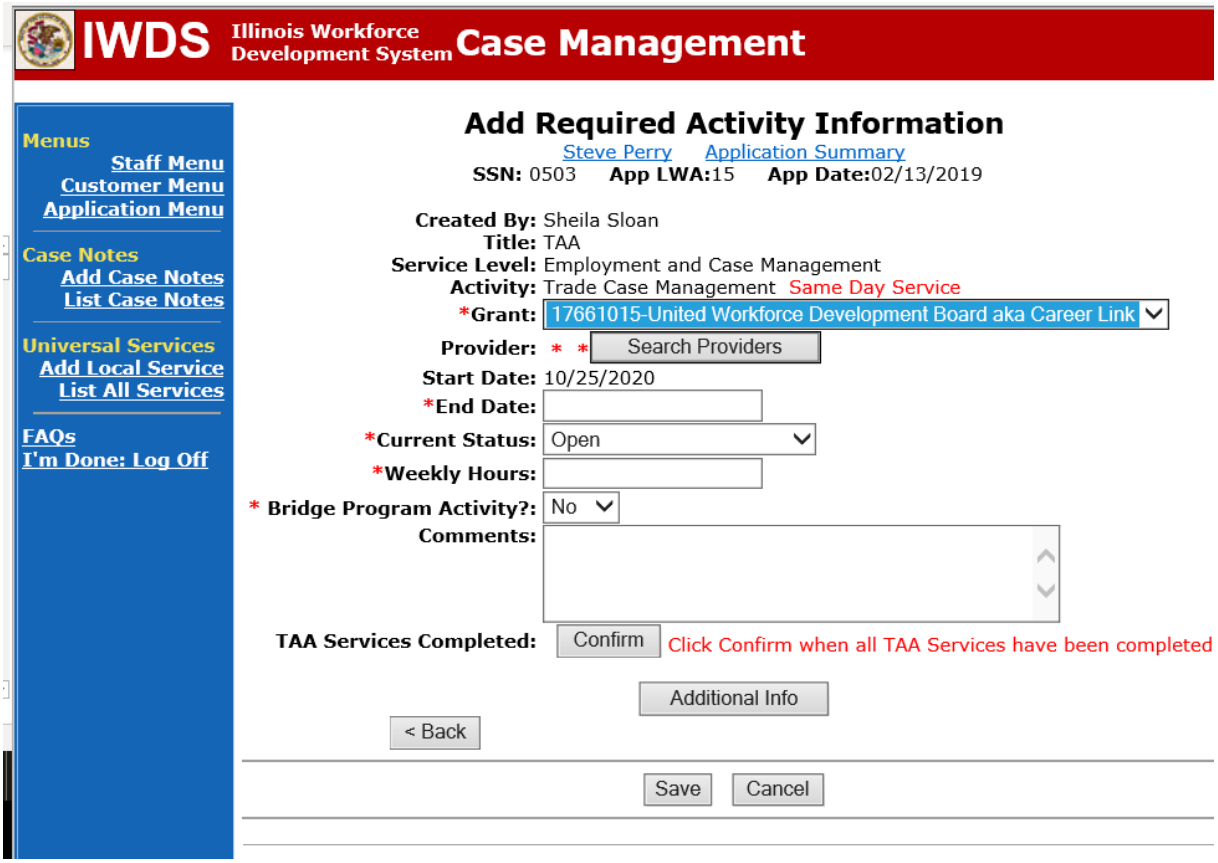
End Date – today's date or date service provided.

Current Status – Select Open, Successful Completion or Unsuccessful Completion. Usually this would be marked as Successful Completion.

Weekly Hours – enter estimated number of weekly hours case management is being provided.

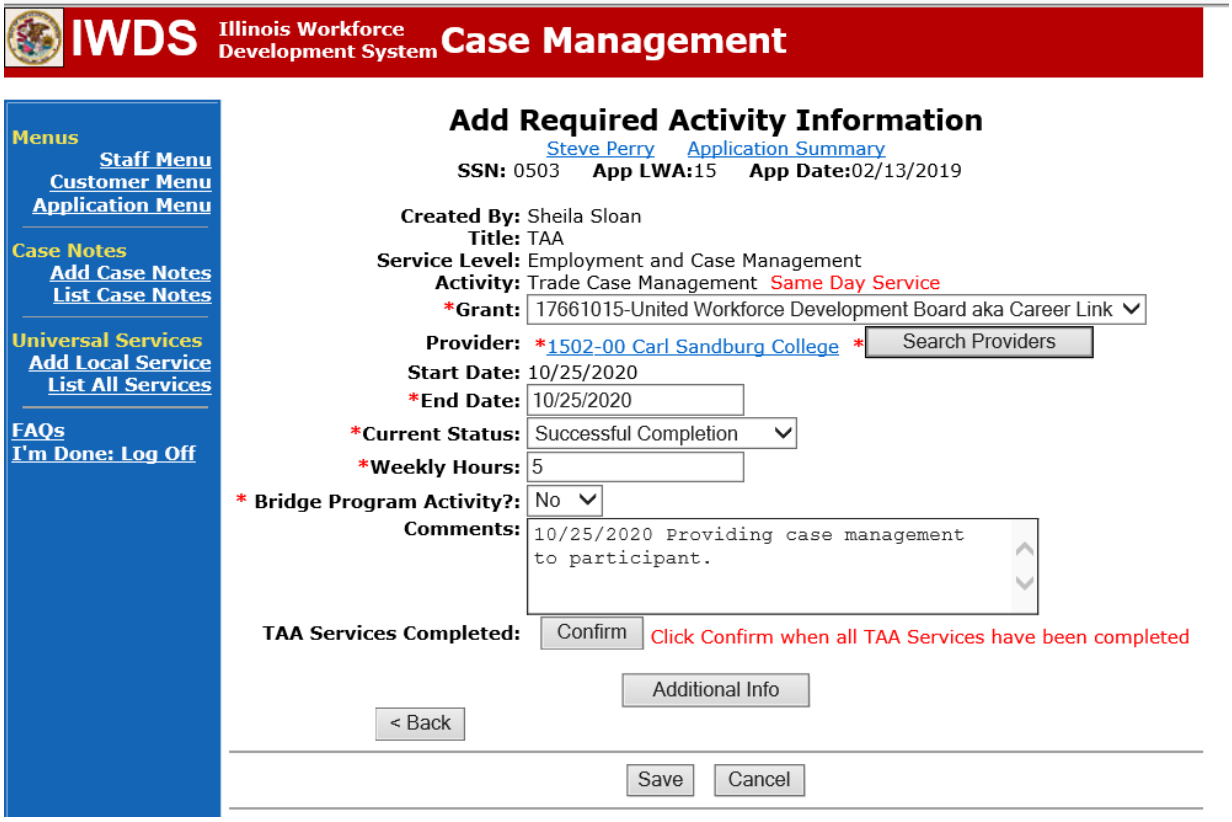
Bridge Program Activity – Usually marked "No".

Comments – Enter a dated comment in the comment box describing the case management being provided to the participant.



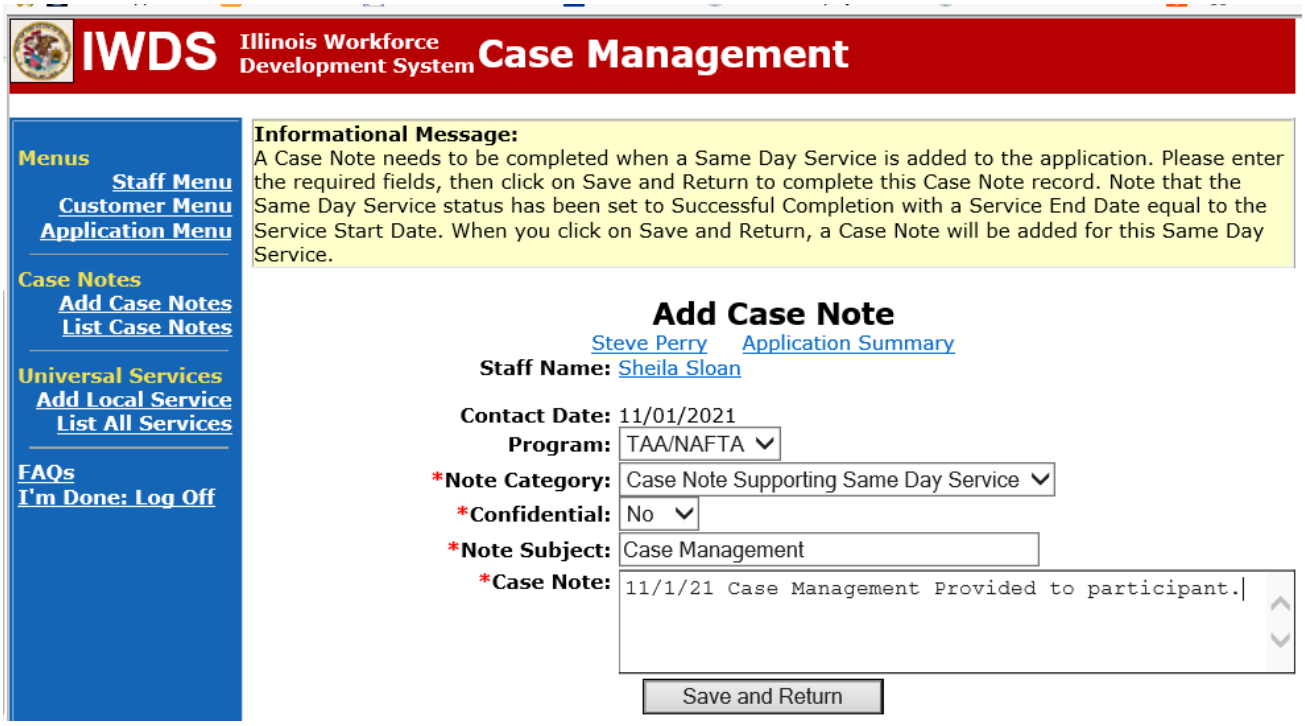
To **Search Providers:**
Click **Show All**
Select **Provider** from list. This should be the LWIA providing the case management service unless there is another organization providing the case management service. If so, select the appropriate provider of the case management service.

Click **Save**.



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 detailed case note detailing the case management service that is being provided to the participant.

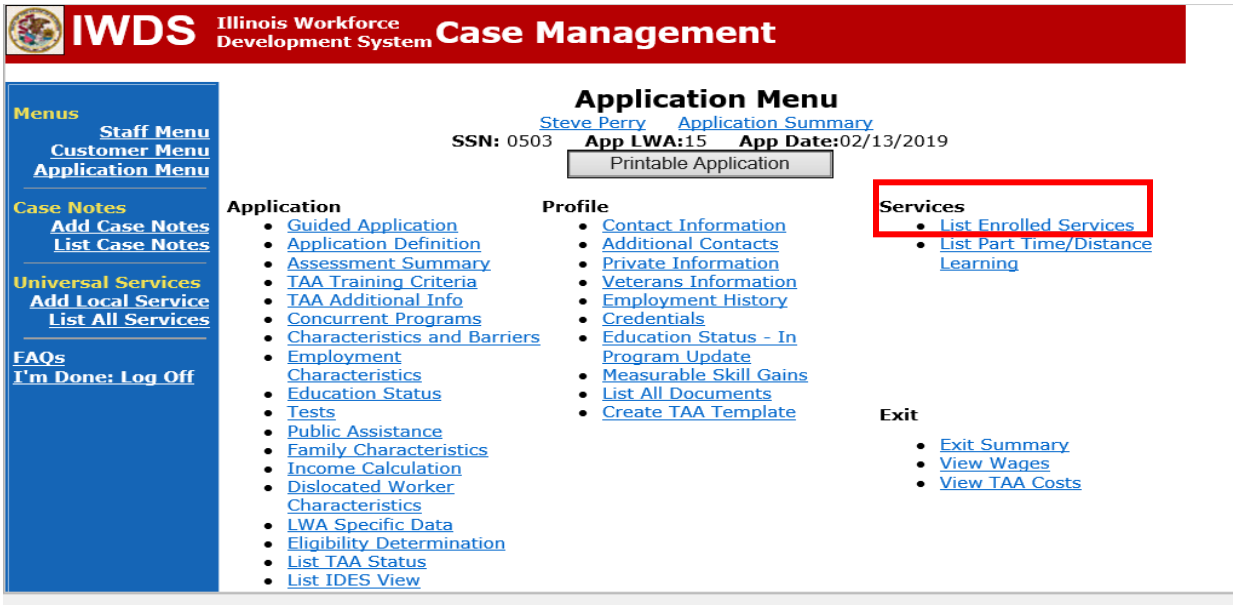
Click **Save and Return**.



This is the **List Enrolled Services Screen** once you have saved the **Case Management Service Record**.

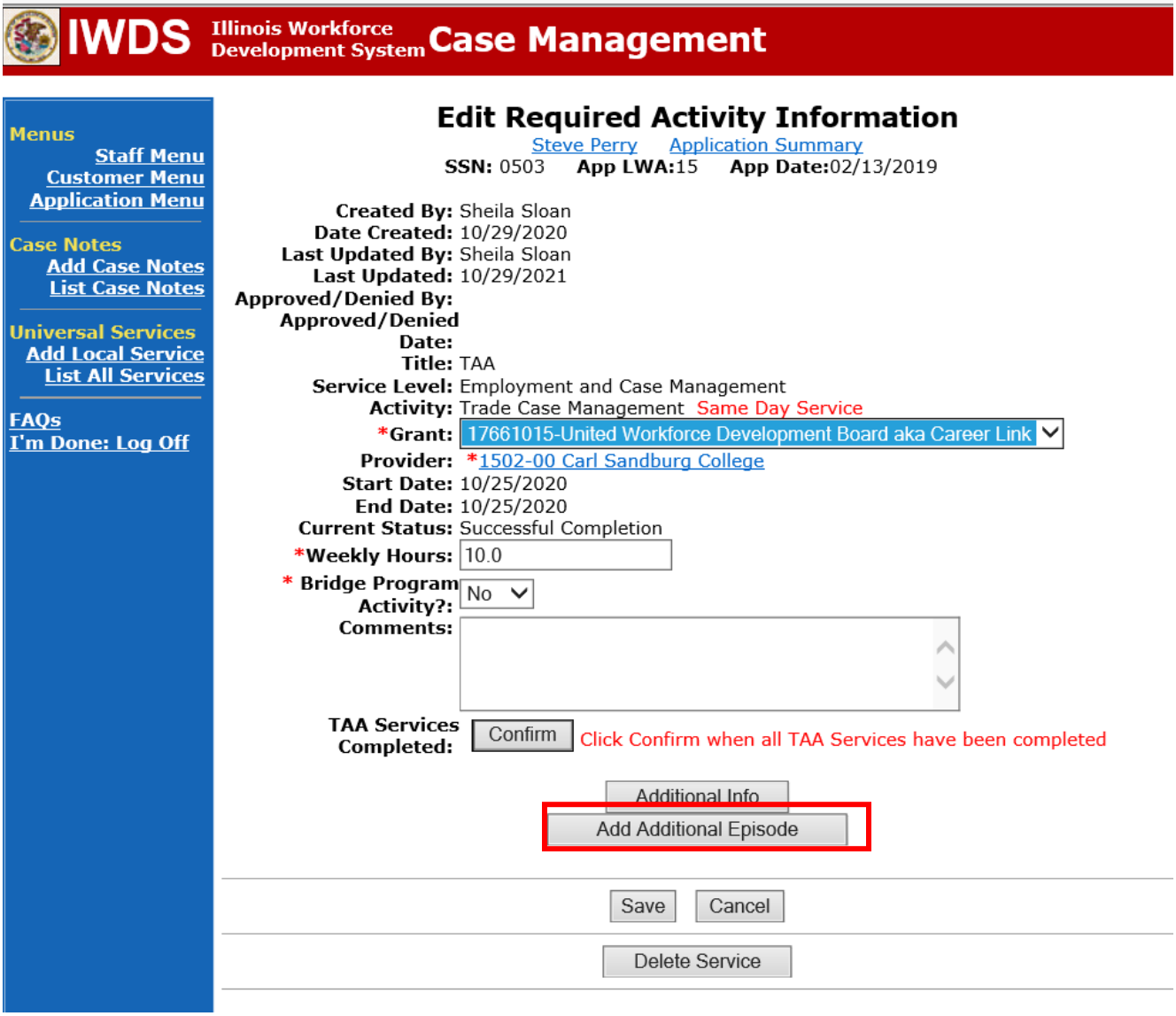
Trade Application Entry (Add Additional Episode to Trade Case Management Service Record)

Click **List Enrolled Services** on the **Application Menu** on the **TAA Application** for the participant.



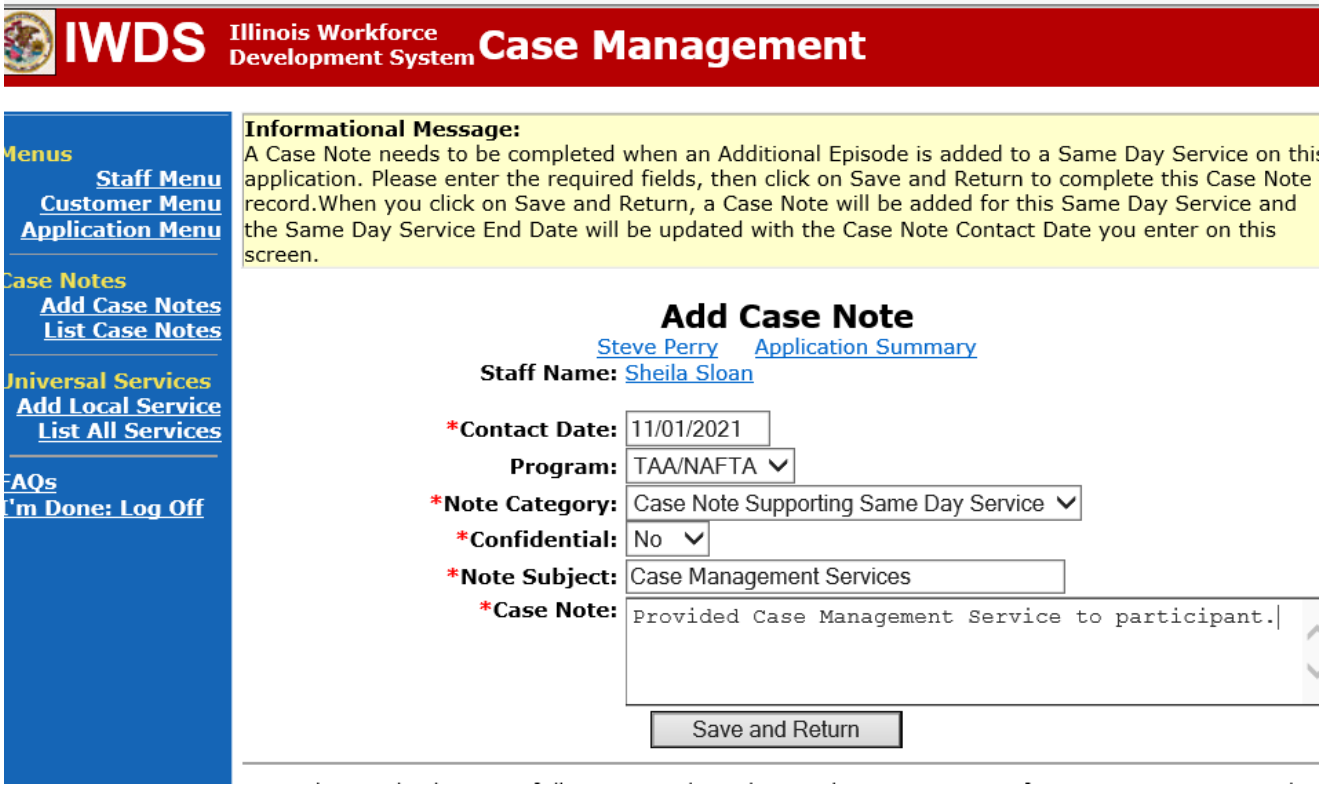
Click on **Trade Case Management – TAA.**

Click **Add Additional Episode**.

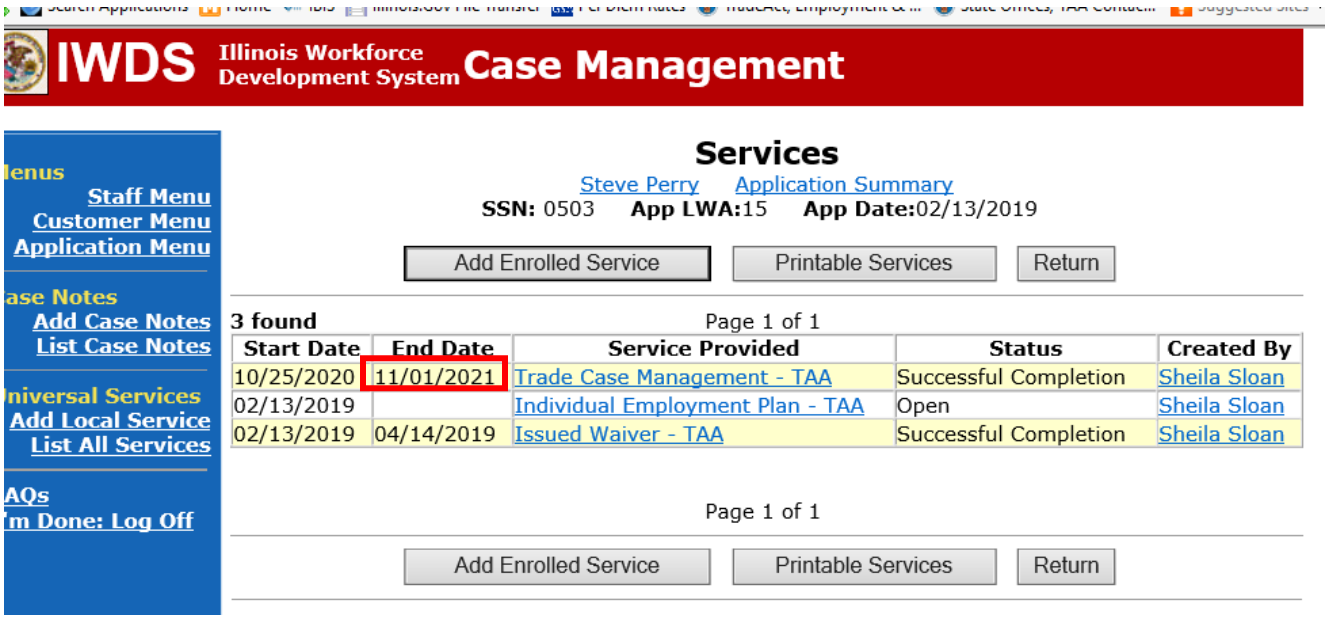


Complete the following fields:
Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.
Program – Select **TAA/NAFTA** from the drop down list.
Note Category – Select the appropriate entry from the drop down list.
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 detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.



NOTE: The End Date for the Trade Case Management – TAA Service Record has updated with the current date of the entry that was just made.



WIOA Application: No entry.

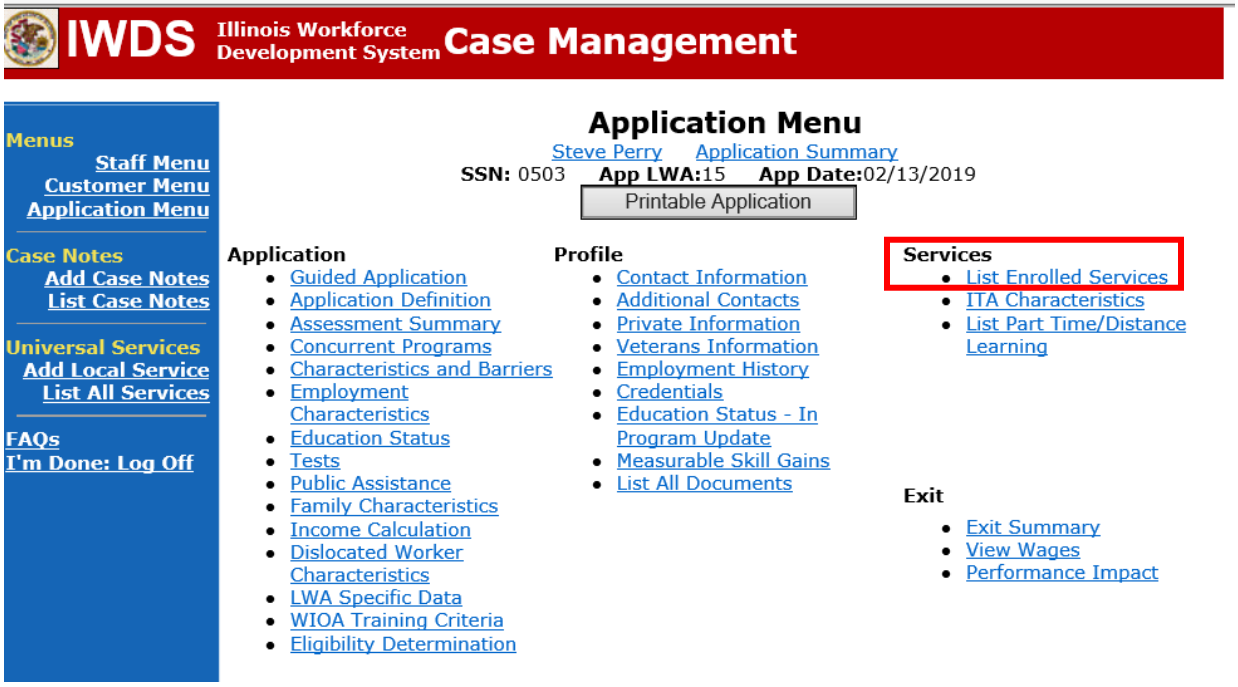
For those participants covered by certifications numbered 98,000+ (2021R):

Trade Application: No entry.

WIOA Application:

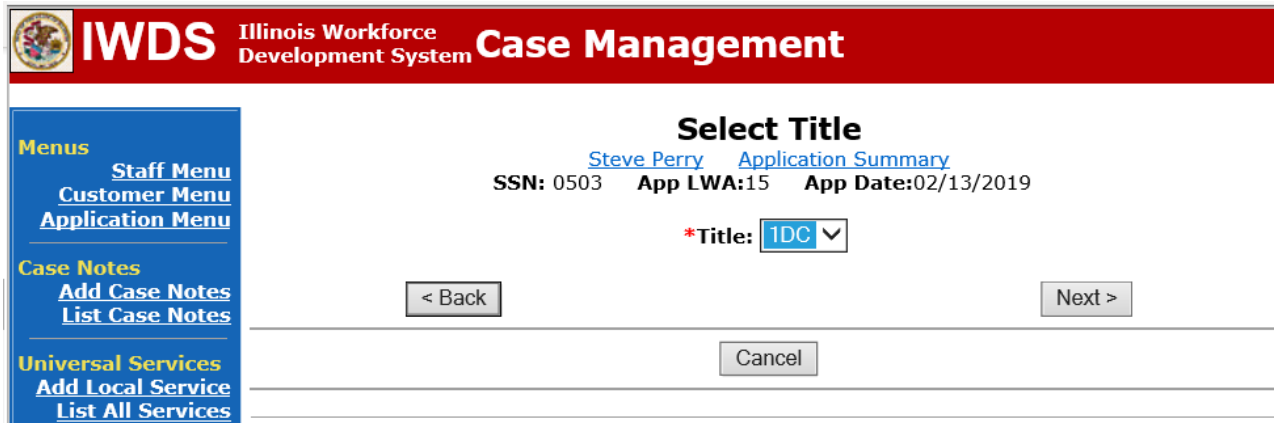
WIOA Application Entry (Initial Career Planning (Case Management) Service Record).

Click **List Enrolled Services** on the **Application Menu** on the **WIOA Application** for the participant.

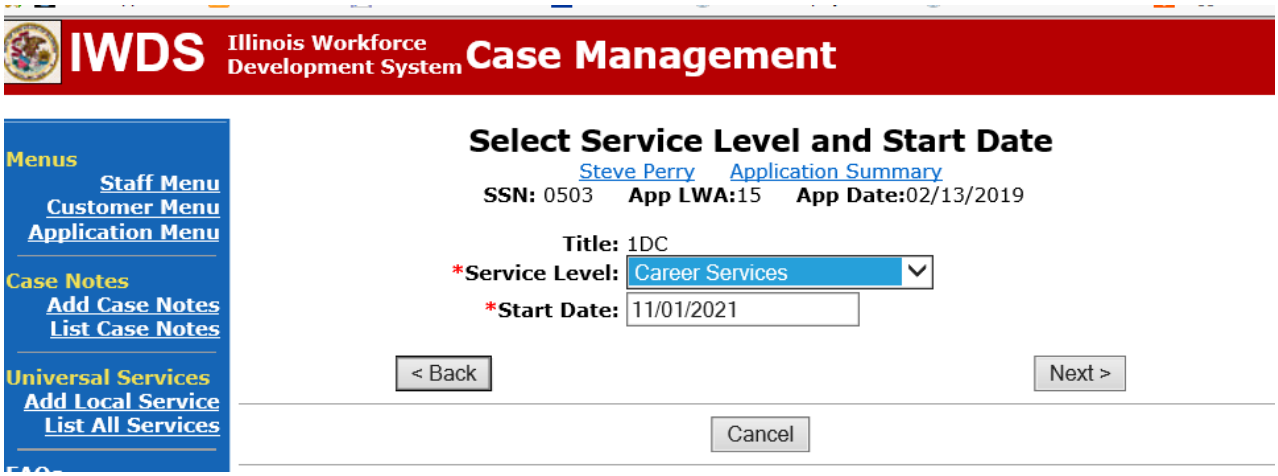


Click **Add Enrolled Service**.

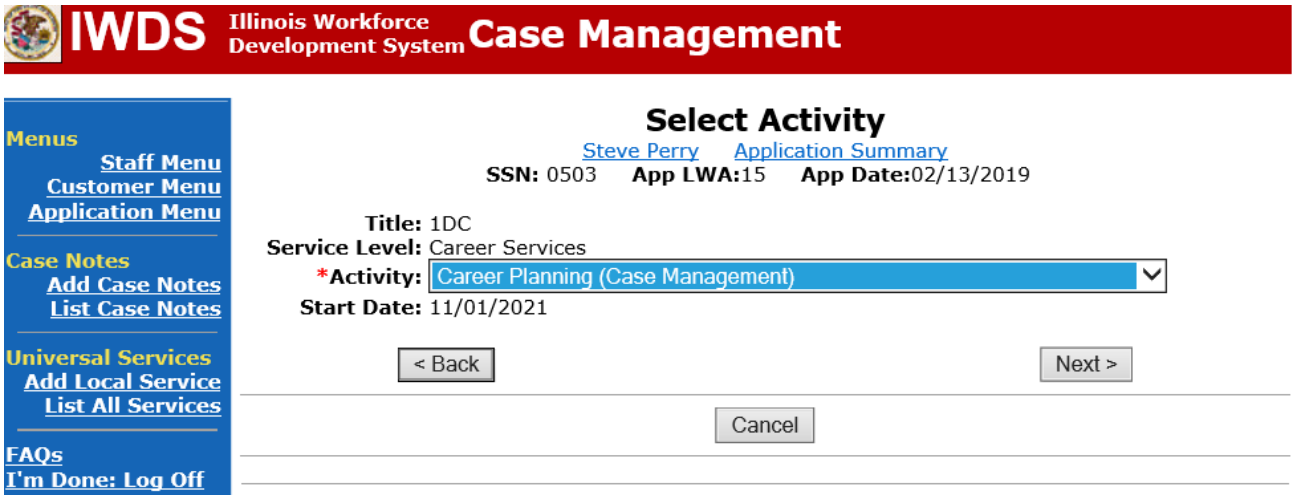
Select **1DC or 1EC** from the drop down list for **Title**.
Click **Next.**



Select **Career Services** for **Service Level** from the drop down list.
Click **Next.**



Select **Career Planning (Case Management)** for **Activity** from the dop down list.



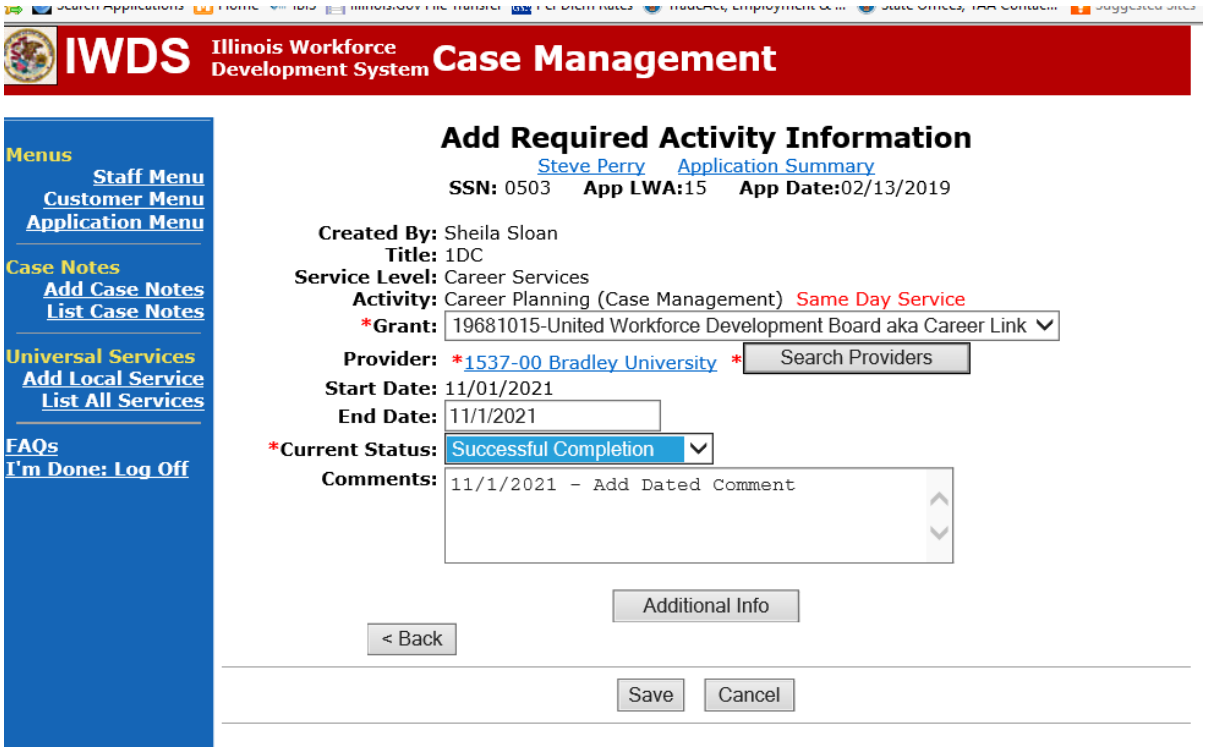
Complete all required fields:

Search Providers – Click on the **Search Providers Button** and see instructions below.

End Date – today's date or date service provided.

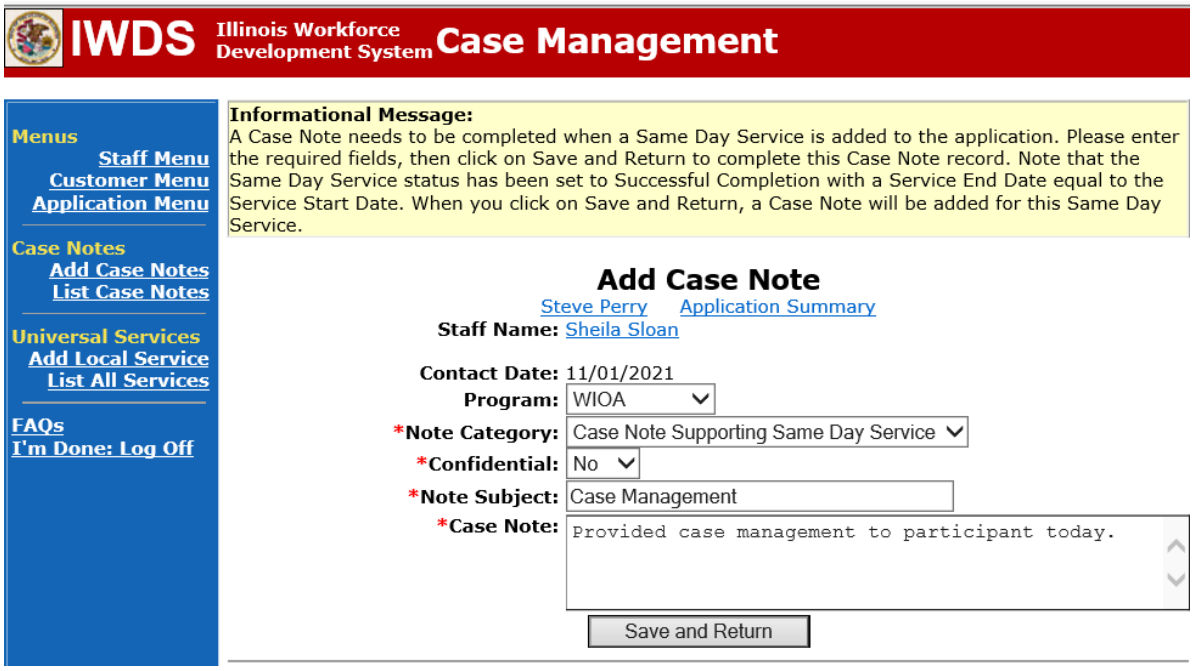
Current Status – Select Open, Successful Completion or Unsuccessful Completion. Usually this would be marked as Successful Completion.

Comments – Enter a dated comment in the comment box describing the case management being provided to the participant.



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 detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.



NOTE: Any additional WIOA funded services being provided to the participant need to be entered on the WIOA application on IWDS.

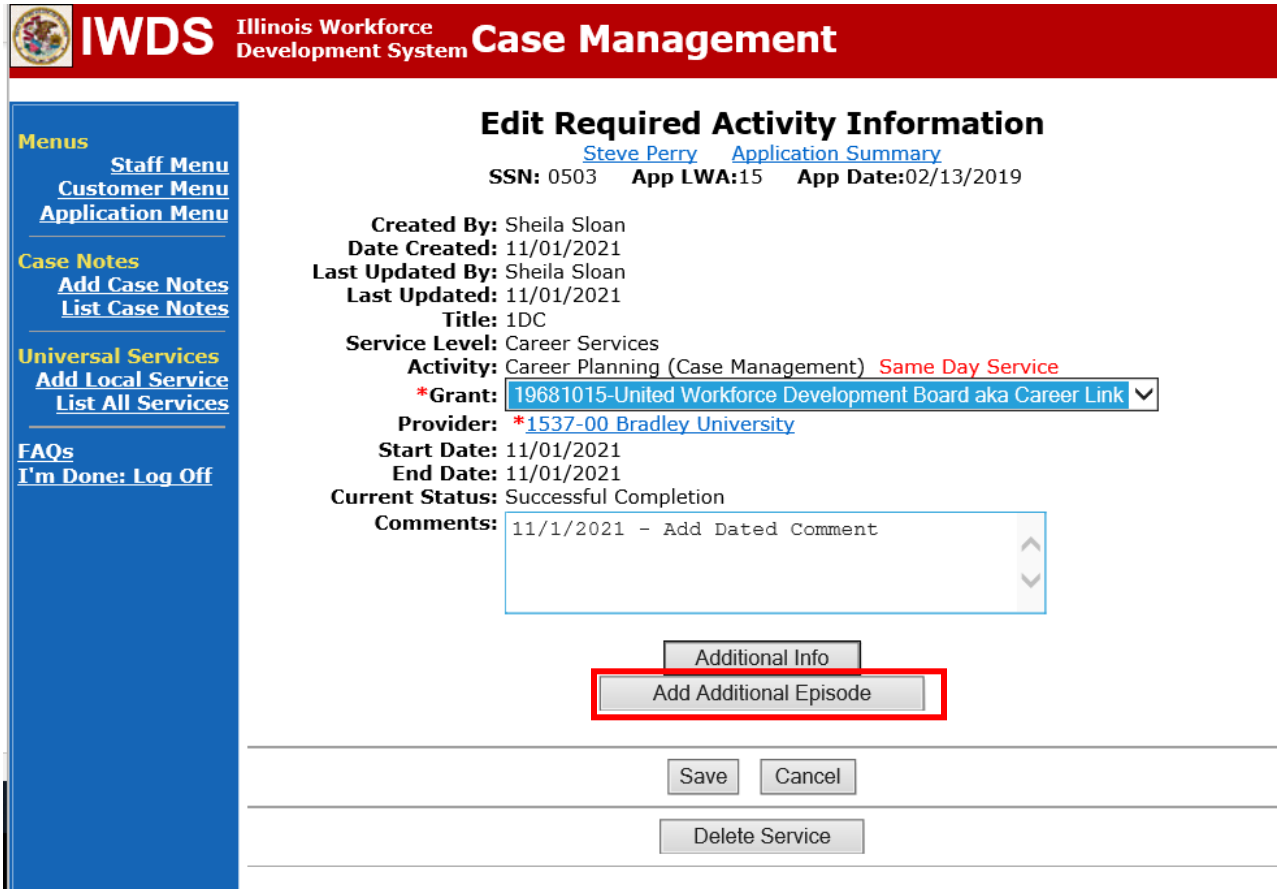
This is the **List Enrolled Services Screen** once you have saved the **Career Planning (Case Management) Service Record**.

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.

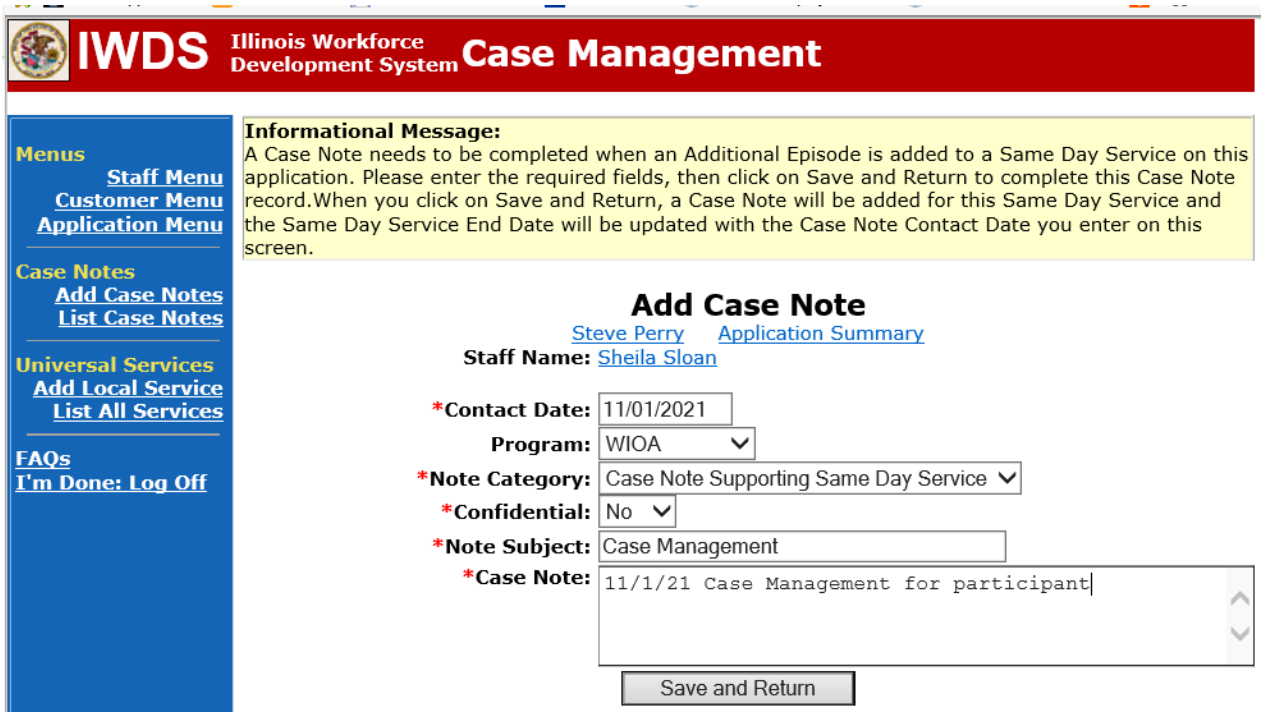
Click on **Career Planning (Case Management) – 1DC.**

Click **Add Additional Episode.**



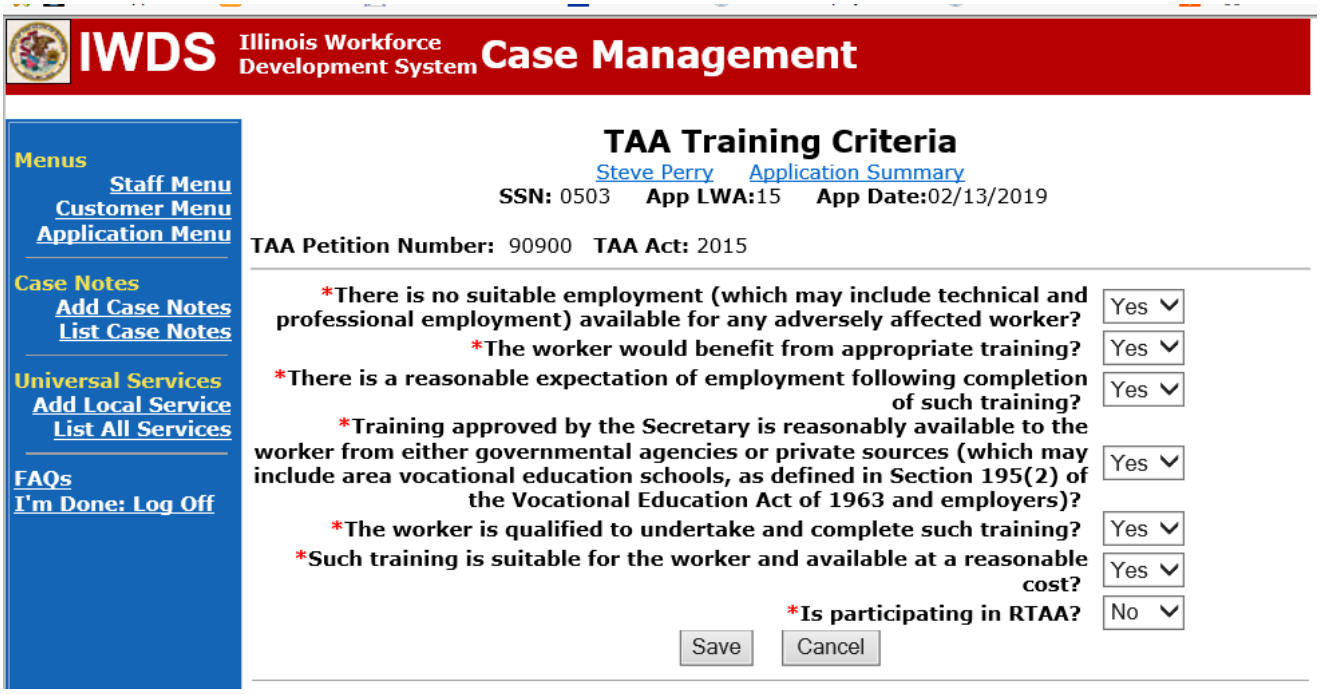
Complete the following fields:
Contact Date – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.
Program – Select **WIOA** from the drop down list.
Note Category – Select the appropriate entry from the drop down list.
Confidential – 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 detailed case note detailing the case management service that is being provided to the participant.

Click **Save and Return**.



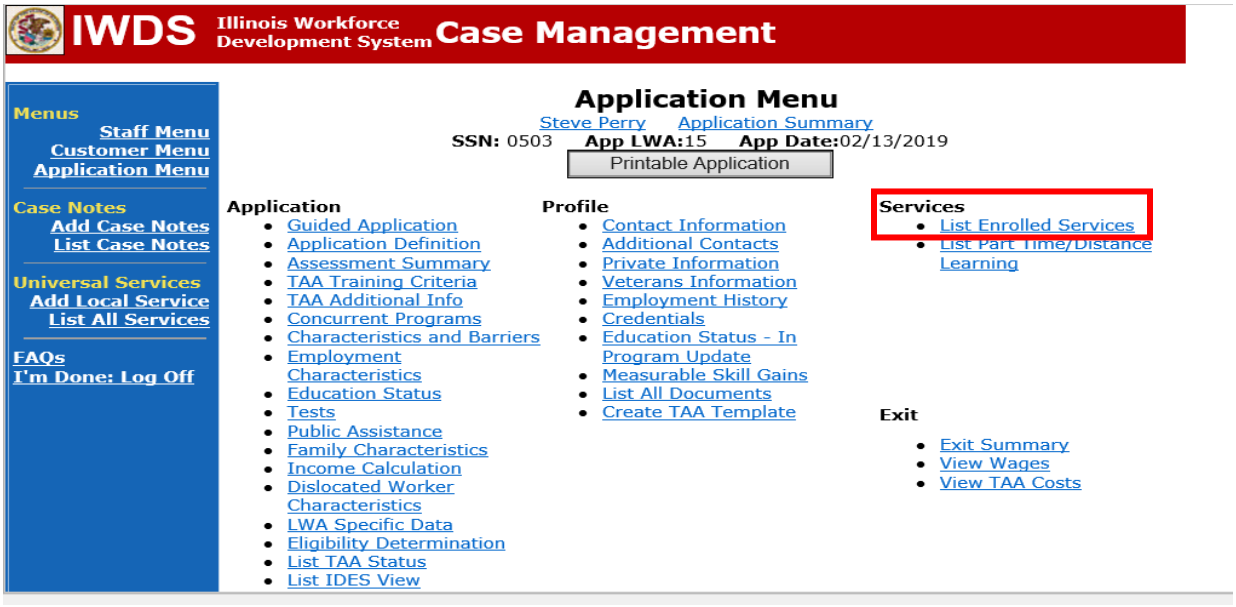
Update the **TAA Training Criteria** screen in IWDS.

If enrolling a participant in training, the first six questions must be answered "Yes". The RTAA question is answered "No" unless the participant is enrolling in RTAA.

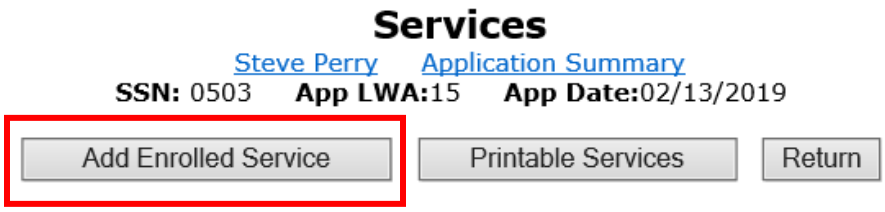


Occupational Skills Training

To enter Occupational Skills Training:



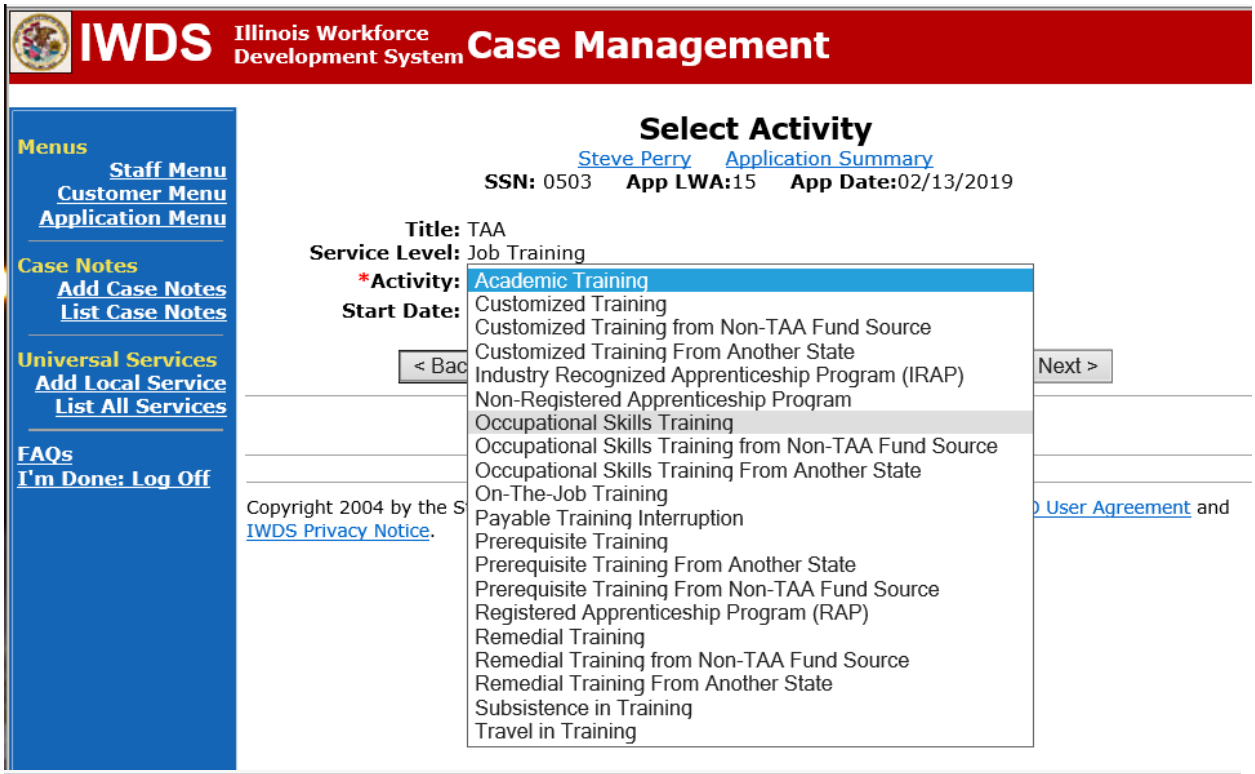
Click **Add Enrolled Service**.

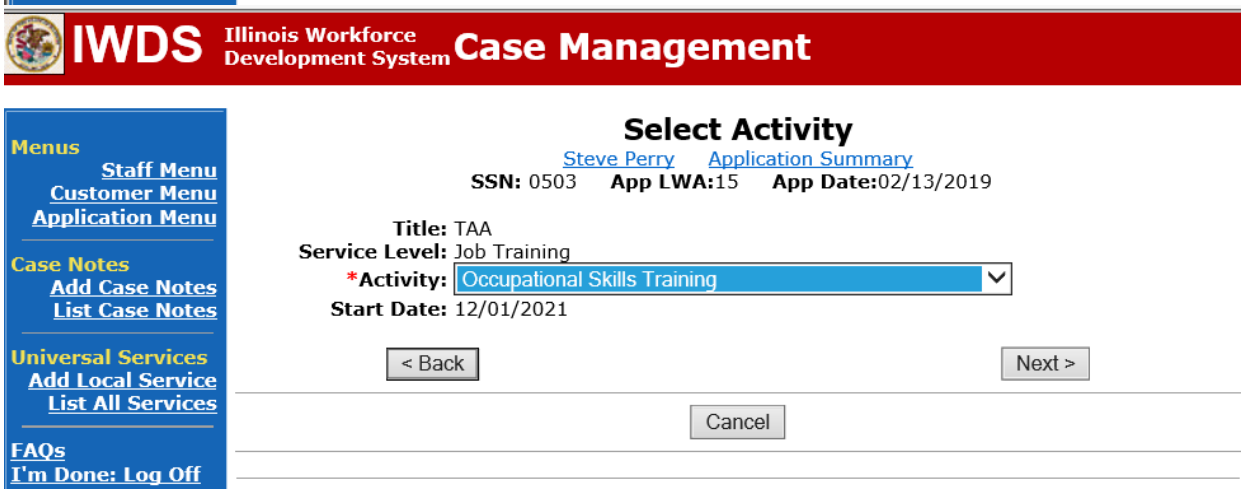


Select **TAA** from the drop down for the **Title**. Then click **Next**.

Select **Job Training** for **Service Level**.
Enter **Start Date**. The start date should be the date the training will begin.
Click **Next**.

Select the type of training the participant is being enrolled in for **Activity**.
Click **Next**.

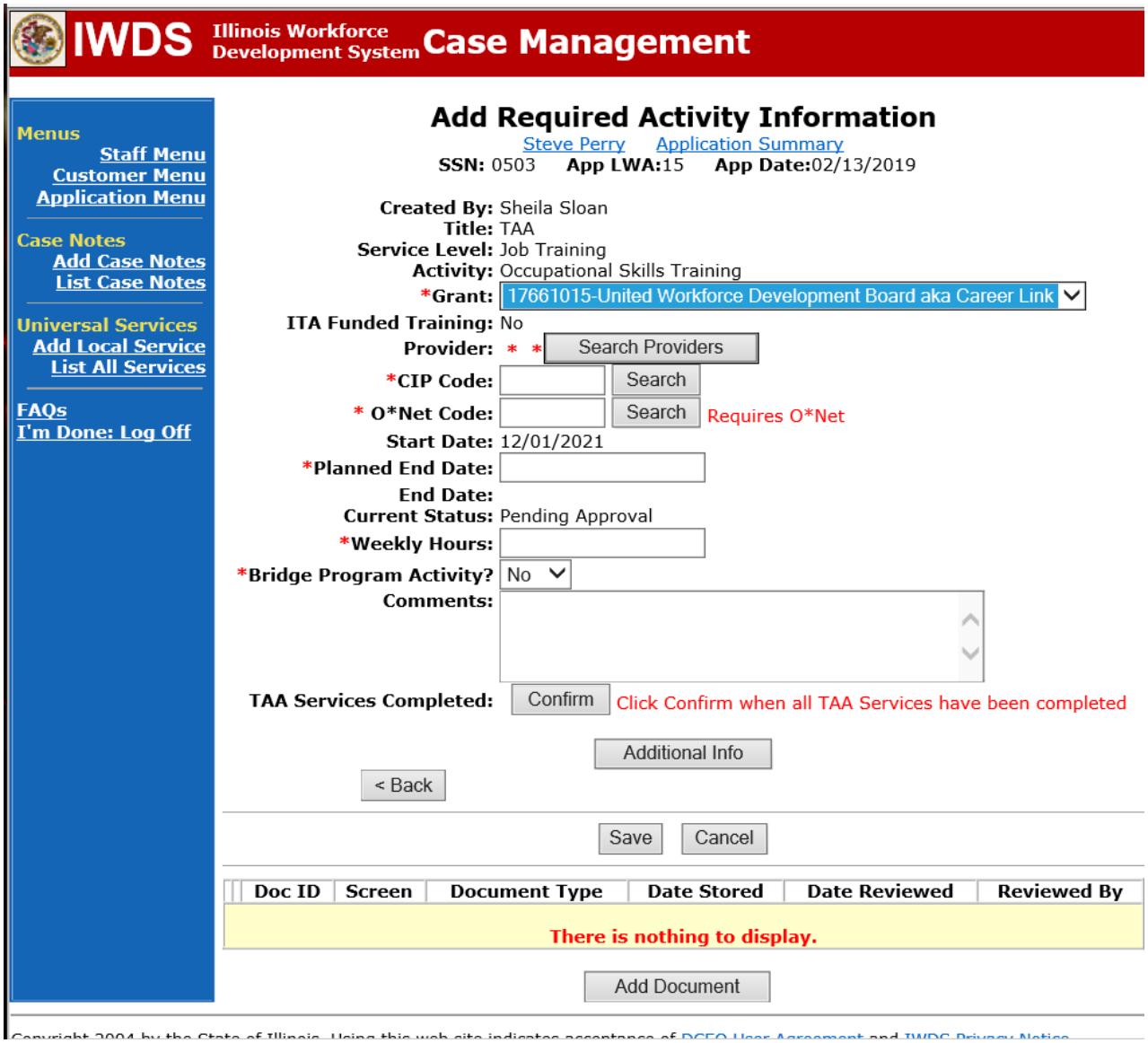




For Trade, the **ITA Funded Training** should always be **No**.
Click **Next**.

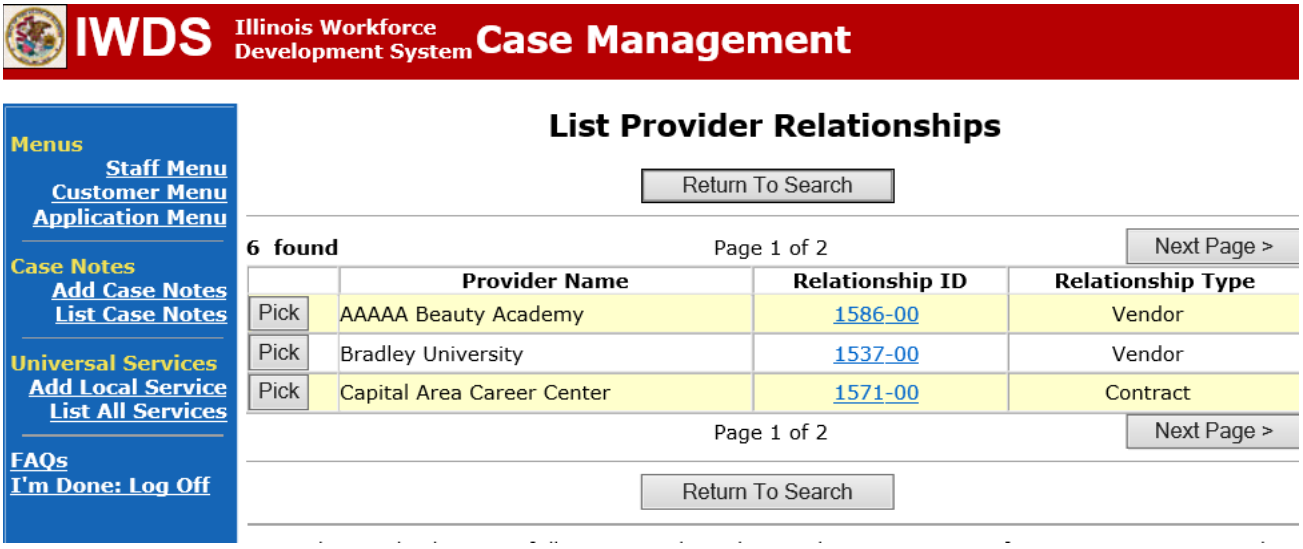
IWDS
Illinois Workforce Development System
Case Management
Menus
Staff Menu
Customer Menu
Application Menu
Case Notes
Add Case Notes
List Case Notes
Universal Services
Add Local Service
List All Services
FAQs
I'm Done: Log Off
Select Training Type
Steve Perry
Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019
Title: TAA
Service Level: Job Training
Activity: Occupational Skills Training
* ITA Funded Training: No
Start Date: 12/01/2021
< Back
Next >
Cancel

Select the correct **Grant** from the drop down. This should be the most recent grant number.



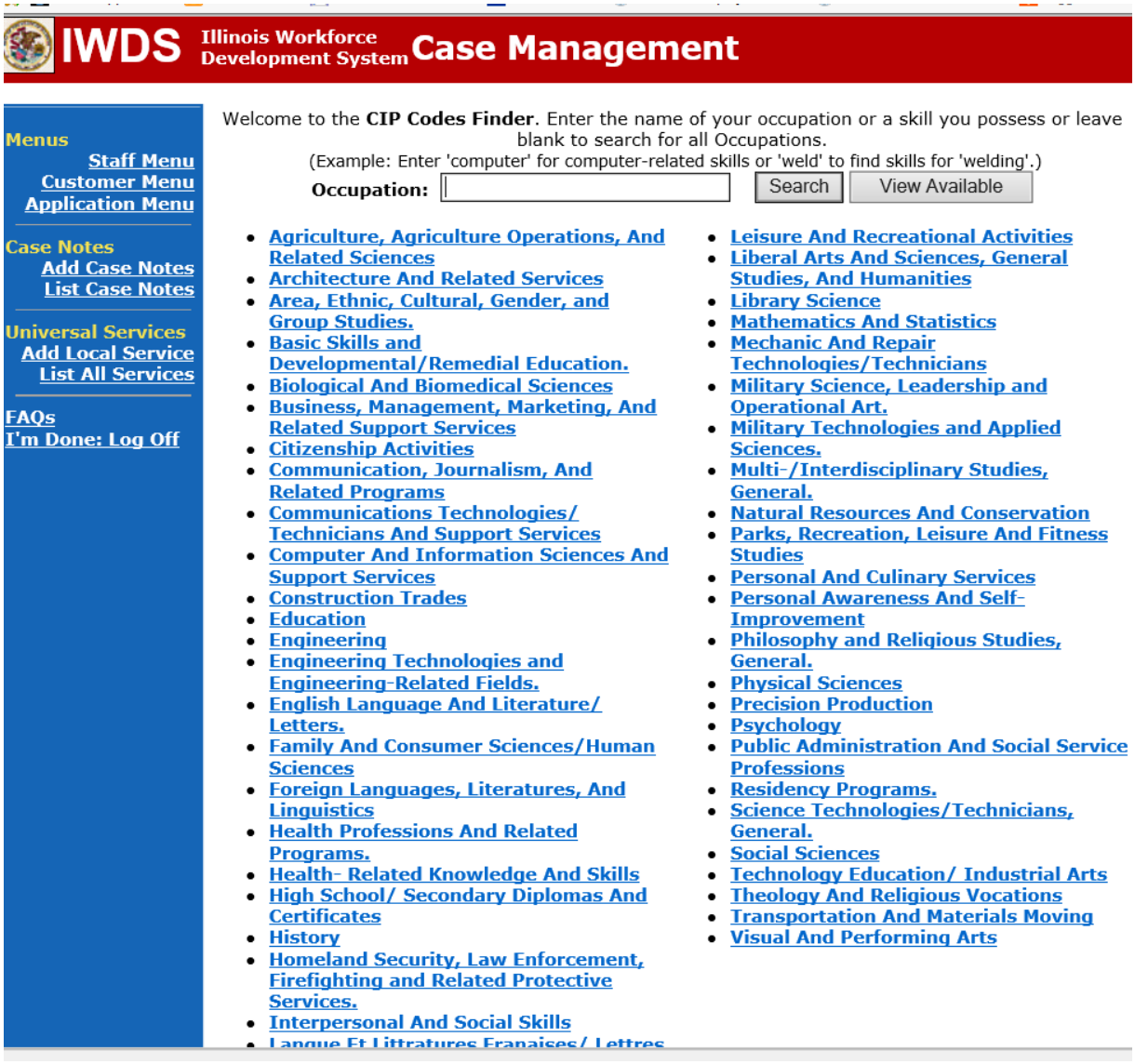
Click **Search Providers** to select the training provider where the participant will be attending for the training.
Click **Show All** or enter the Provider name to search for the training provider.

Select the appropriate training provider by clicking **Pick** beside the provider name.

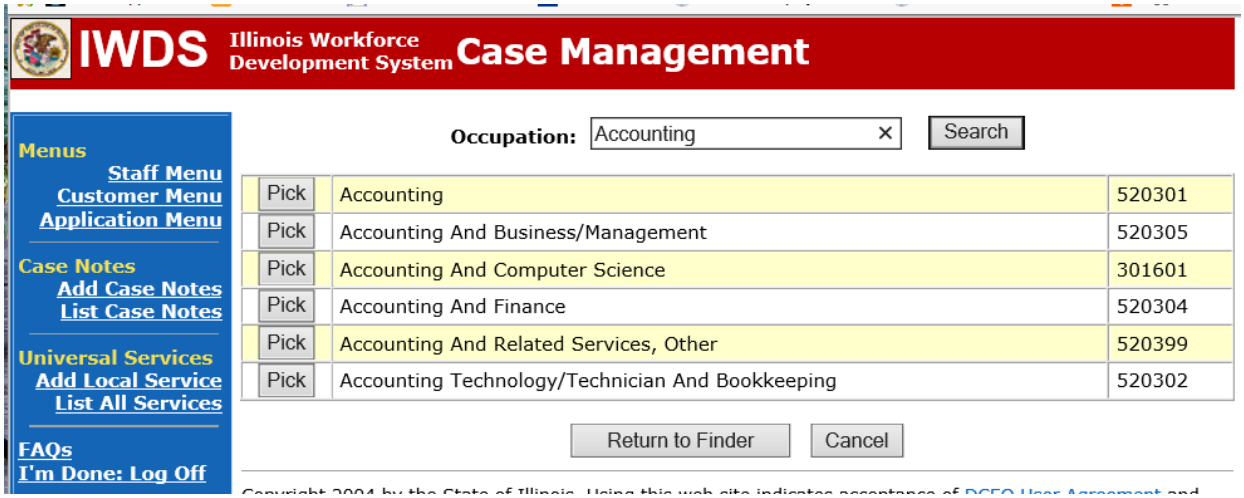


Click **Search** for the CIP Code to select the appropriate **CIP Code** for the training the participant will be attending.

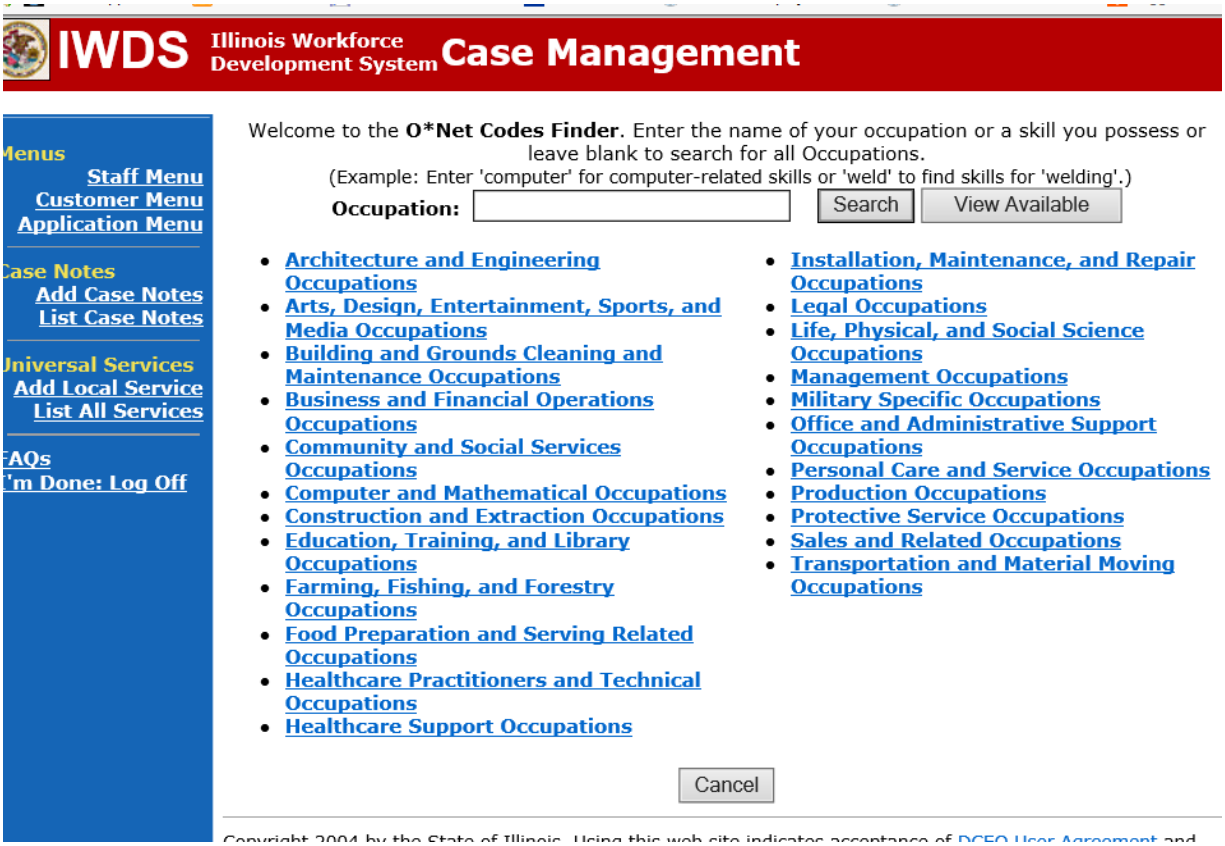
Enter an **Occupation** in the Box and Click **Search** or select from the categories listed.



Click **Pick** for the occupation the participant will be training for.

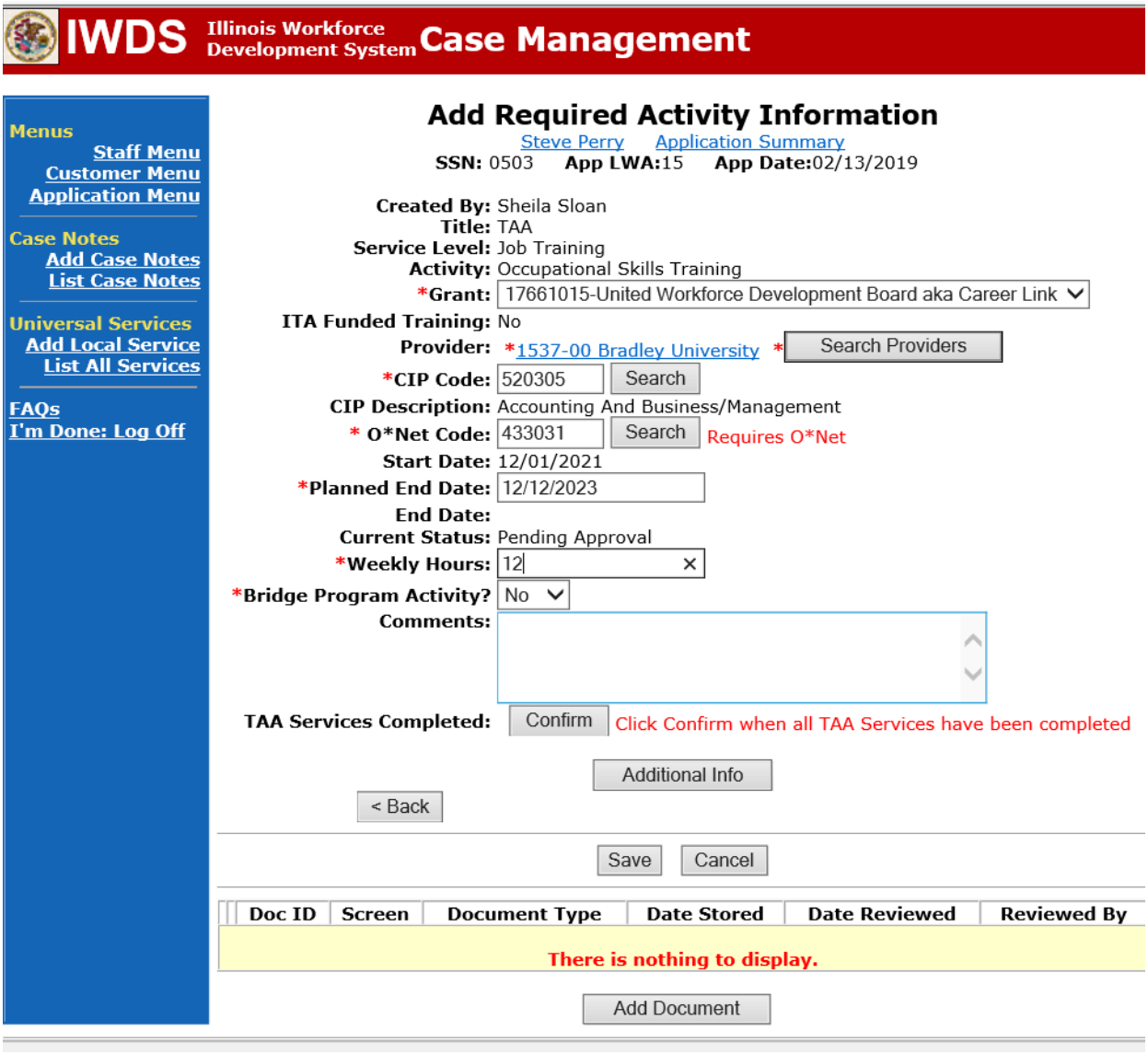


Click **Search** for the **O*Net Code** for the training the participant will be attending.
Enter an **Occupation** in the Box and Click **Search** or select from the categories listed.



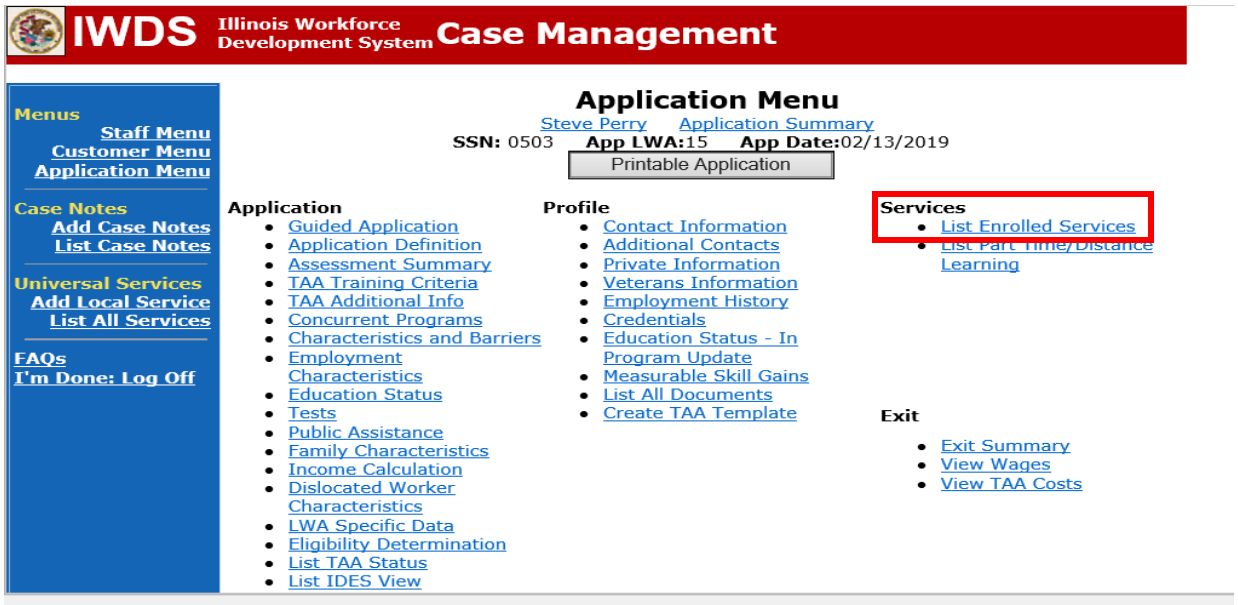
Click **Pick** next to the occupation that the participant is attending training for.

Enter the **Planned End Date** for the training.
Enter the **Weekly Hours** it is estimated the participant will be attending training.
Select the appropriate answer for the **Bridge Program Activity.** Unless the participant is enrolled in a specific Bridge type of program, this should be marked "No".
Enter any specific comments in the **Comment Box** that are necessary. NOTE: For Remedial and Pre-Requisite Training, the courses being taken must be entered in the **Comment Box.**
Click **Save**. This will set the record to a pending approval status.

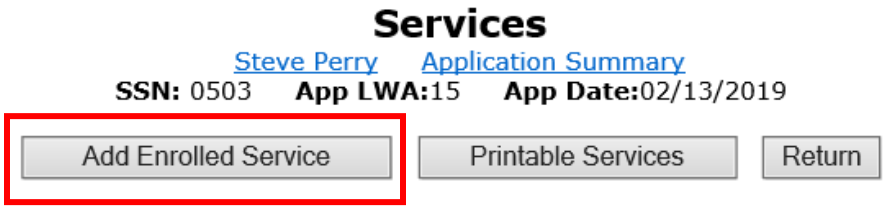


If the participant is eligible for travel/subsistence reimbursements, the career planner must enter the **Travel in Training** or **Subsistence in Training Service Record** following these steps:

Enter the **Travel in Training** or **Subsistence in Training Service Record**, if applicable.



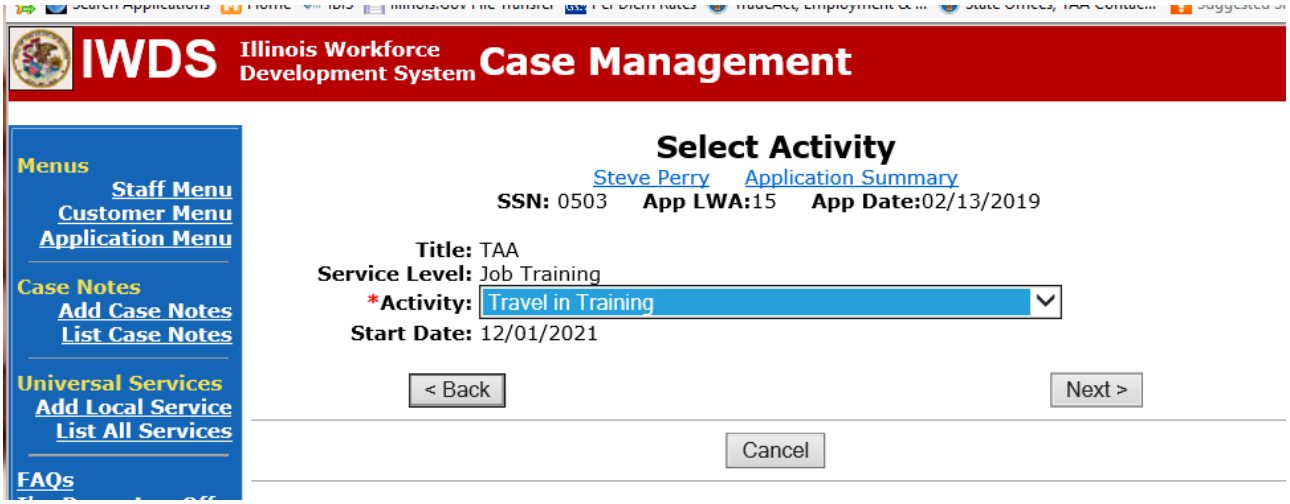
Click **Add Enrolled Service**.



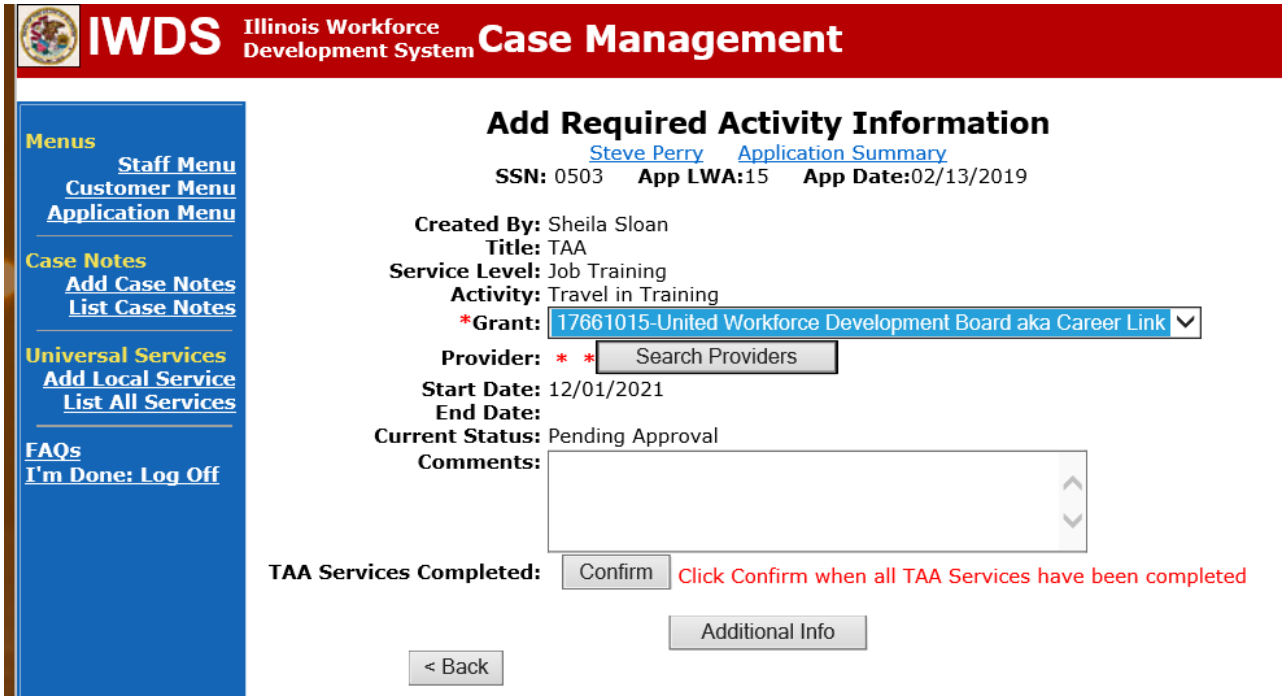
Select **TAA** from the drop down for the **Title**. Then click **Next**.

Select **Job Training** for **Service Level**.
Enter **Start Date**. The start date should be the date the training will begin.
Click **Next**.

Select **Travel in Training or Subsistence in Training**, as applicable, for **Activity**.
Click **Next**.

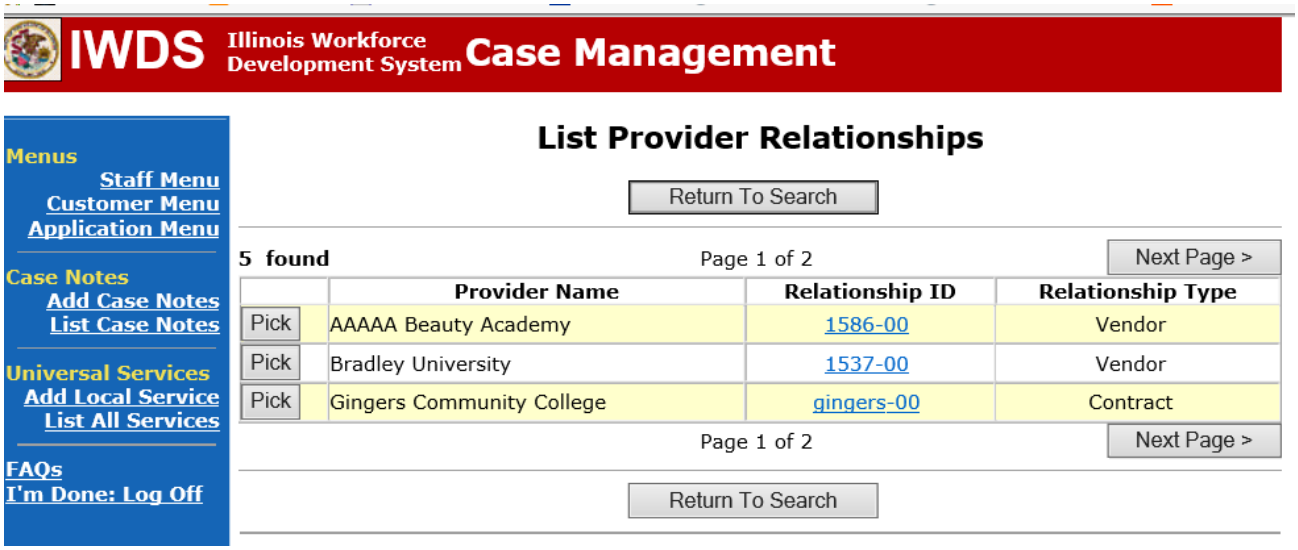


Click on **Select Provider**

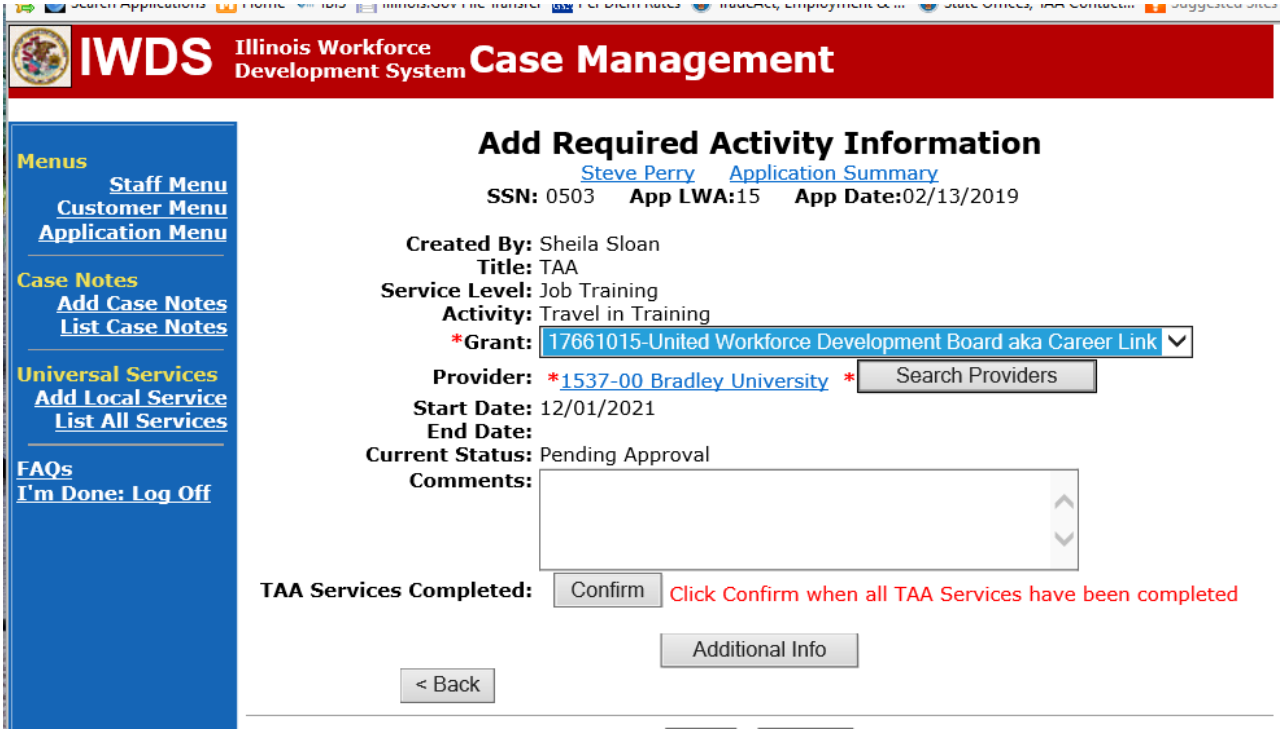


Enter the Provider Name and click **Search** or click on **Show All.**

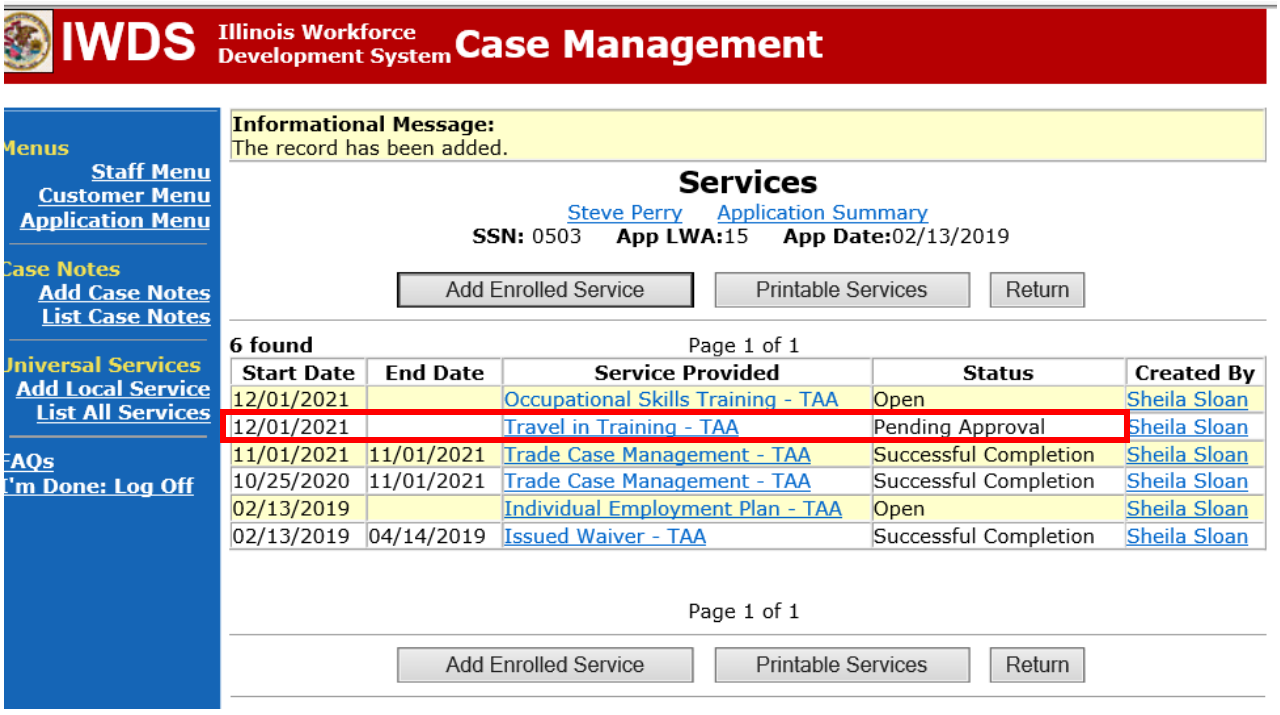
Select the provider by clicking on **Pick** beside the provider name.


IWDS
Illinois Workforce Development System
Case Management
Menus
Staff Menu
Customer Menu
Application Menu
Case Notes
Add Case Notes
List Case Notes
Universal Services
Add Local Service
List All Services
FAQs
I'm Done: Log Off
List Provider Relationships
Return To Search
5 found
Page 1 of 2
Next Page >
Provider Name
Relationship ID
Relationship Type
Pick
AAAAA Beauty Academy
1586-00
Vendor
Pick
Bradley University
1537-00
Vendor
Pick
Gingers Community College
gingers-00
Contract
Page 1 of 2
Next Page >
Return To Search

Click **Save**



The **Travel in Training Service Record** is now in a pending approval status.



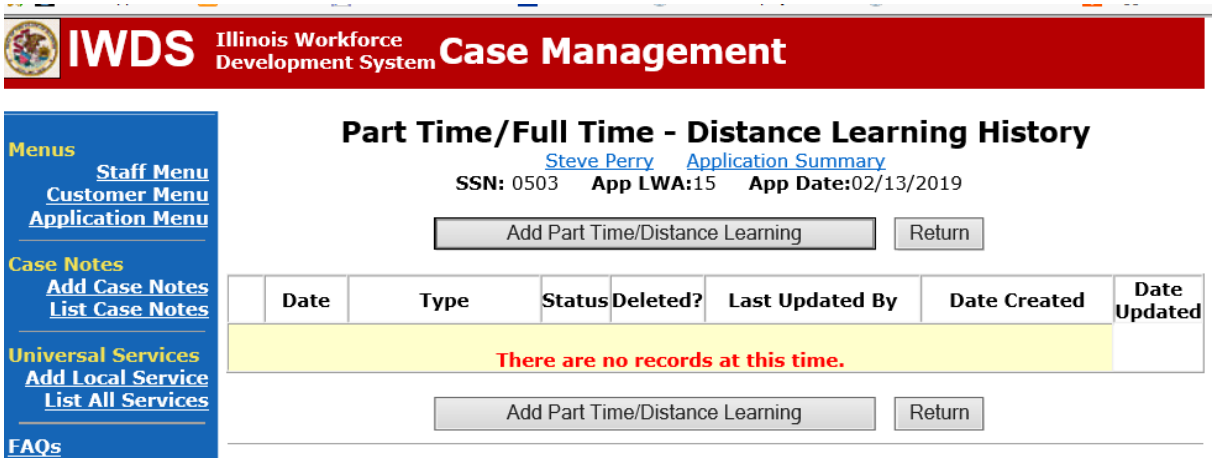
PART-TIME/DISTANCE LEARNING

If the **Occupational Skills Training** is part-time or online (distance learning), the career planner must complete the following steps:

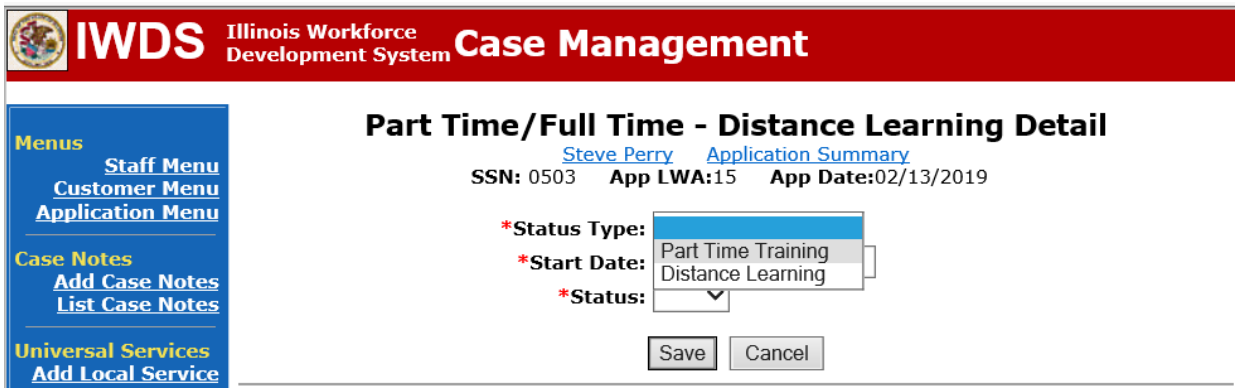
To add a **Part Time Indicator:**

Under **Services** in IWDS, the career planner will select **List Part Time/Distance Learning**

Click **Add Part Time/Distance Learning**

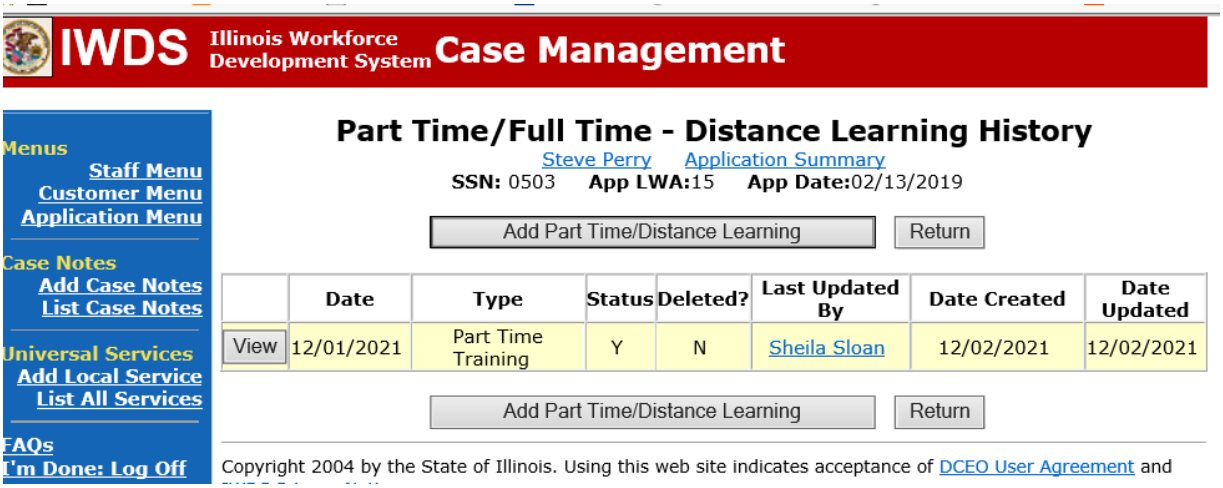


Select **Part Time** under **Status Type**
Enter the date the part-time training begins under **Start Date**
Select **Yes** for **Status**.



Click **Save**.

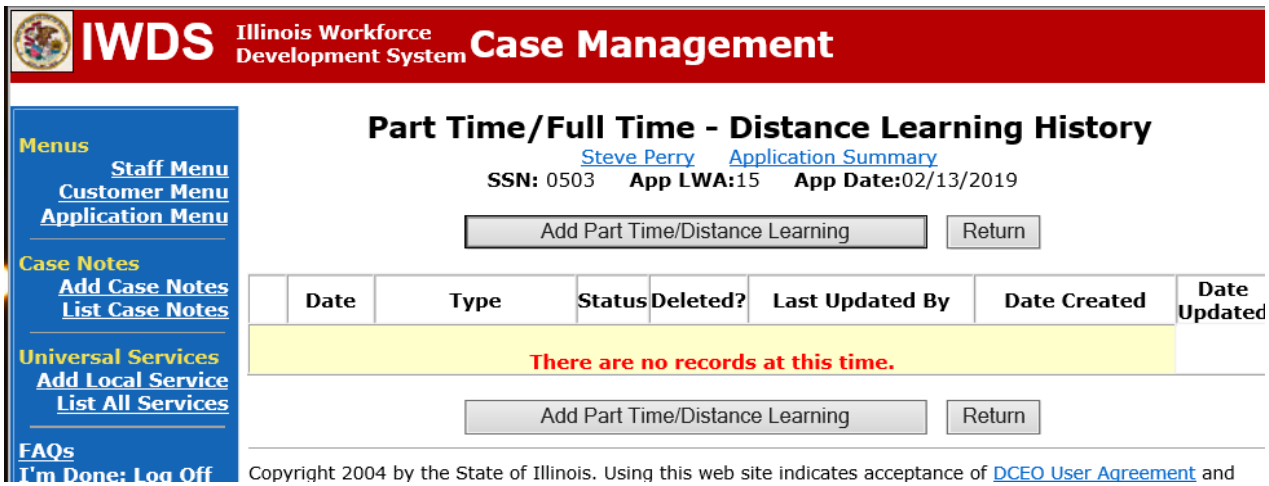
This is what the screen looks like after you click **Save.**



To add a **Distance Learning Indicator**:

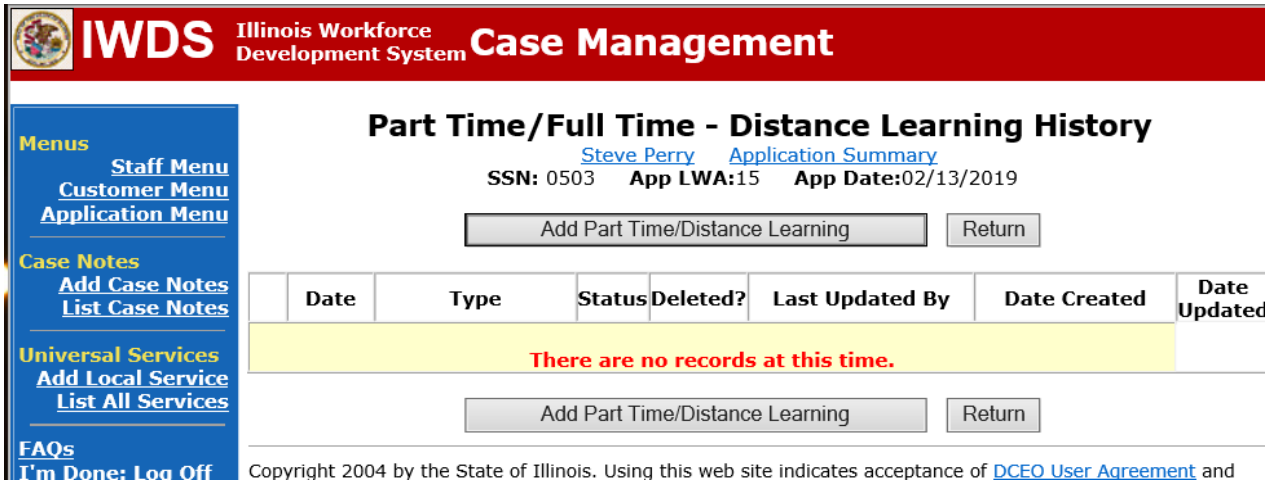
Under **Services** in IWDS, the career planner will select **List Part Time/Distance Learning**

Click **Add Part Time/Distance Learning**.

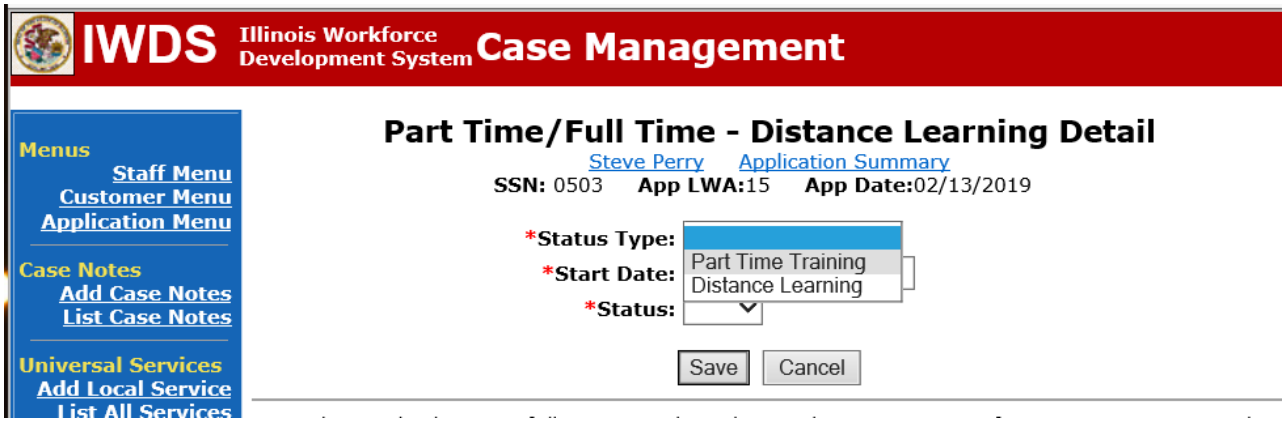


To add a **Distance Learning Indicator**:

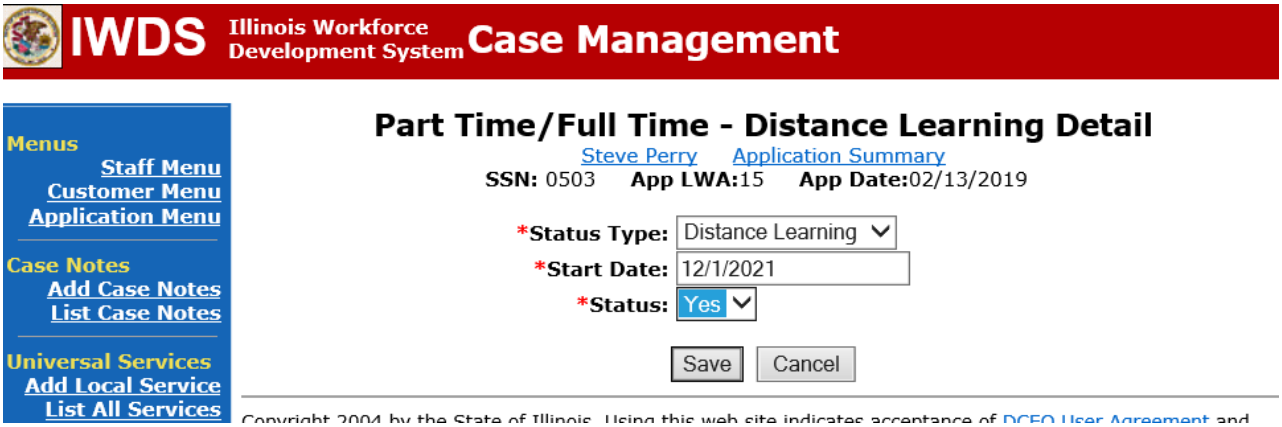
Click **Add Part Time/Distance Learning**.



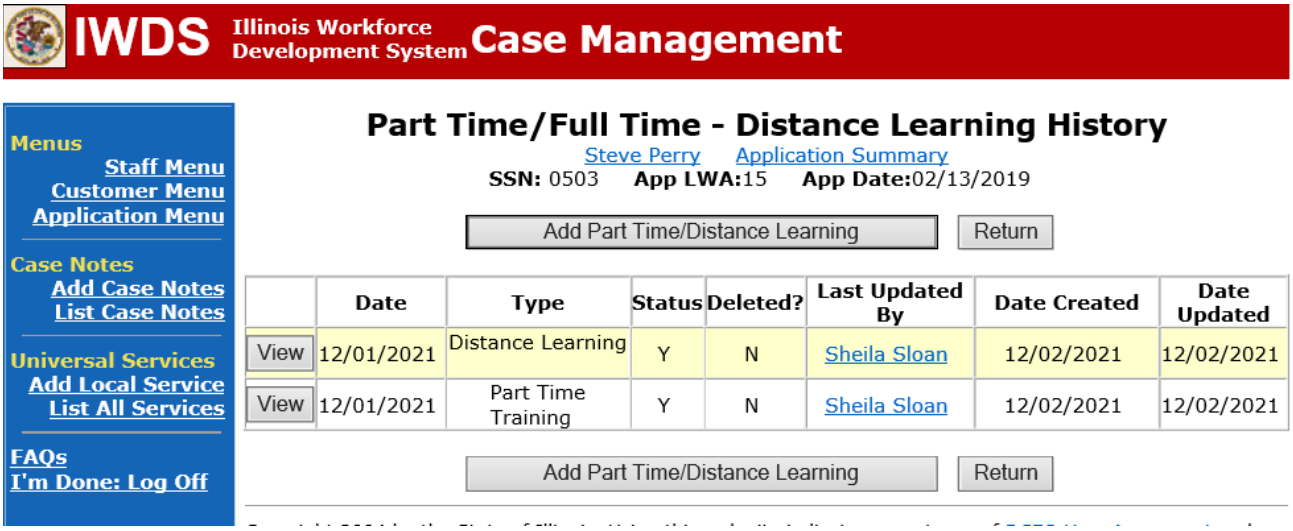
Select **Distance Learning** for **Status Type.**
Enter the date the distance learning begins under **Start Date**
Select **Yes** for **Status**.



Click **Save.**



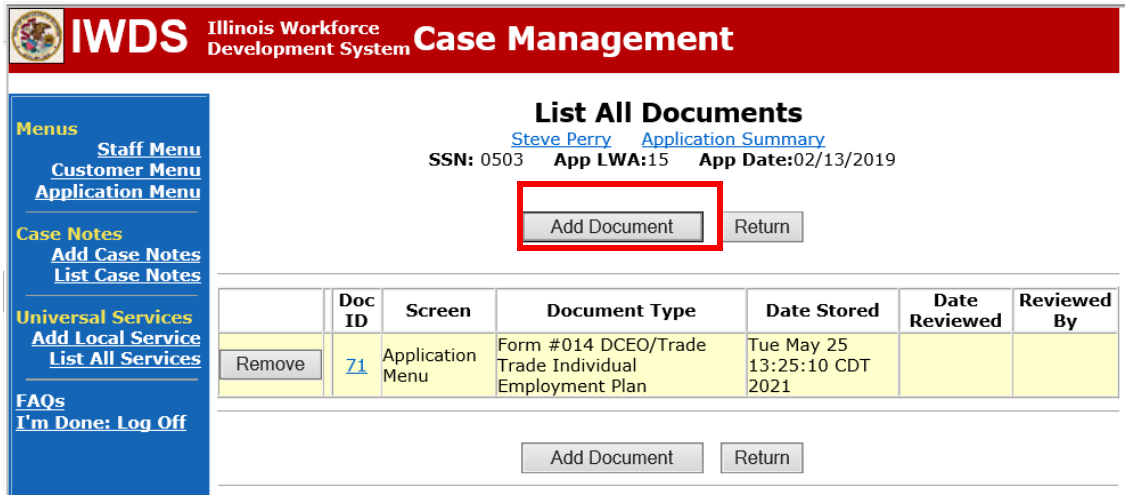
This is what the screen looks like after you click **Save.**



Upload the **IEP** and **IEP Modification Form**, **Training Enrollment Form** or **WBT Agreement**, **Transportation-Subsistence Form**, Google Maps printout, **Tracking Form**, 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).

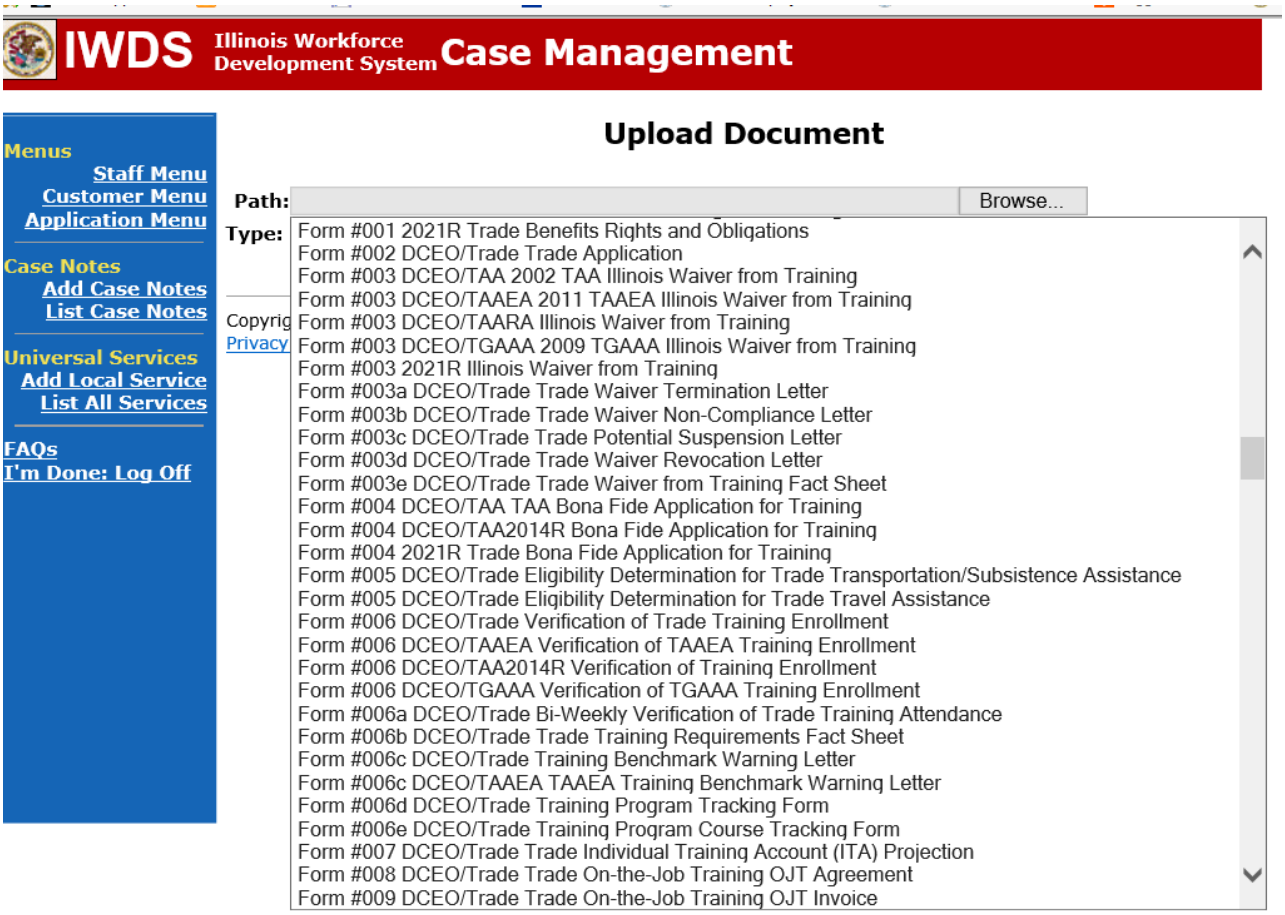
Click **Add Document**.



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.**



Send an email request to state merit staff for approval using the following format (if, it is a revision, forward the last state merit staff approval):

> **Email Subject Line:** New IEP or IEP Modification (as applicable) and Occupational Skills Training Approval Request – "Customer First Name Initial and Participant Last Name" – LWIA XX
> **Body of Email:**
> Can we have a New IEP (or IEP Modification) and Occupational Skills Training Approval for:
>
> **Include information for the items below:**
>
> **Participant Name:**
> **Training Institution:**
> **Training Program:**
> **Total Training Weeks:**
> **Start Date of Training Program:**
> **Planned End Date of Training Program:**
> **Training Cost:**
> **Transportation/Subsistence Cost:**
> **Total 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 him/her 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.