

REMEDIAL TRAINING

The career planner will do the following for submission of requests to approve remedial 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.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header, the user's name "Steve Perry" and "Application Summary" are displayed. The user's SSN is 0503, App LWA is 15, and App Date is 02/13/2019. A "Printable Application" button is visible. The main content area is divided into three sections: "Application", "Profile", and "Services". The "Services" section is highlighted with a red box and contains a list of options, including "List Enrolled Services", "List Part Time/Distance Learning", "Exit Summary", "View Wages", and "View TAA Costs". A left-hand navigation menu contains various options such as "Staff Menu", "Customer Menu", "Application Menu", "Case Notes", "Universal Services", and "FAQs".

Click **Add Enrolled Service**.

The screenshot shows the "Services" section of the application menu. At the top, the user's name "Steve Perry" and "Application Summary" are displayed. The user's SSN is 0503, App LWA is 15, and App Date is 02/13/2019. Below this information, there are three buttons: "Add Enrolled Service", "Printable Services", and "Return". The "Add Enrolled Service" button is highlighted with a red box.

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

- 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 Title

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

*Title: TAA ▾

< Back Next >

Cancel

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

- 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 Service Level and Start Date

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

Title: TAA

*Service Level: Individual Employment Plan ▾
*Start Date:

< Back Next >

Cancel

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

- Menu
 - [Staff Menu](#)
 - [Customer Menu](#)
 - [Application Menu](#)
- Case Notes
 - [Add Case Notes](#)
 - [List Case Notes](#)
- Universal Services
 - [Add Local Service](#)
 - [List All Services](#)
- FAQs
 - [Home](#)
 - [Log Off](#)

Edit Required Activity Information

[Steve Perry](#) [Application Summary](#)

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

Created By: Sheila Sloan
Date Created: 02/22/2019
Last Updated By: Sheila Sloan
Last Updated: 02/22/2019
Approved/Denied By:
Approved/Denied:
Date:
Title: TAA
Service Level: Individual Employment Plan
Activity: Individual Employment Plan
Provider: *3027-00 Workforce Network
*** O*Net Code:** Requires O*Net
Start Date: 02/13/2019
End Date:
***Current Status:**
Comments:
TAA Services Completed: Click Confirm when all TAA Services have been completed

IEP Amount:
IEP Comments: 2/13/19 - Establishing IEP for customer Steve Perry.

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

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**.

IWDS Illinois Workforce Development System **Case Management**

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: 02/13/2019 X
 Status End Date:

Comments: 2/13/19 - Establishing IEP for customer Steve Perry.

IEP Amount Approved:

Created By: Sheila Sloan Date Created: 02/22/2019
 Last Updated By: Sheila Sloan Date Last Updated: 02/25/2019

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

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

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**.

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
View	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	Sheila Sloan	02/25/2019
View	02/13/2019		IEP	Approved	Sheila Sloan	02/25/2019

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

Click **Save**.

IWDS
Illinois Workforce Development System
Case Management

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:

IEP Amount Approved:

Created By: Sheila Sloan **Date Created:** 02/22/2019
Last Updated By: Sheila Sloan **Date Last Updated:** 02/25/2019

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

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



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: <input type="text"/>		2. Modification #: <input type="text"/>	
3. Date of Modification Request: <input type="text"/>		4. Date Modification to Take Effect: <input type="text"/>	
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.			
<input type="checkbox"/> Invoking Equitable Tolling Justification: <input type="text"/>			
<input type="checkbox"/> Waiver Change: <input type="checkbox"/> Criteria Change		<input type="checkbox"/> Date Extension <input type="checkbox"/> Revocation	
<input type="checkbox"/> Additional service(s) List Service(s): <input type="text"/>		<input type="checkbox"/> End Service List Service(s): <input type="text"/>	
<input type="checkbox"/> Date Extension Reason: <input type="text"/> Current End Date: <input type="text"/> New End Date: <input type="text"/>		<input type="checkbox"/> Switch to a New Training Program Reason: <input type="text"/> Current Training Institution: <input type="text"/> Current Training Program: <input type="text"/> New Training Institution: <input type="text"/> New Training Program: <input type="text"/>	
<input type="checkbox"/> Changes in Cost Reason: <input type="text"/>		<input type="checkbox"/> Change in Full-Time/Part-Time Status Reason: <input type="text"/>	
<input type="checkbox"/> Potential Suspension Start Date: <input type="text"/>		<input type="checkbox"/> Switch in On-Site/Online Status	
<input type="checkbox"/> Vacation Break Start Date: <input type="text"/> End Date: <input type="text"/>		<input type="checkbox"/> Final Cost Reconciliation <input type="checkbox"/> Other <input type="text"/>	
<input type="checkbox"/> Switch from Transportation to Subsistence		<input type="checkbox"/> Switch from Subsistence to Transportation	
6. How does the modification affect the total IEP cost?			
Increase \$ <input type="text"/>	Decrease \$ <input type="text"/>	<input type="checkbox"/> No Change	New Total IEP Amount \$ <input type="text"/>
7. Documentation to support Modification: (Mark all that apply)			
<input type="checkbox"/> Training institution documentation		<input type="checkbox"/> Participant documentation/request	
<input type="checkbox"/> File Audit			
<input type="checkbox"/> Other: List documentation: <input type="text"/>			
8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)			
Number of TRA weeks paid: <input type="text"/>		Number of eligible TRA weeks remaining: <input type="text"/>	
With this modification, the participant has enough remaining weeks of TRA eligibility to complete the training? <input type="checkbox"/> Yes <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input type="checkbox"/> No			

8 words  

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.

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 "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 View TAA Costs.

Click **Add Enrolled Service**.

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

0 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
There is nothing to display.				

Page 1 of 1

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

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

*Title:

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**.



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:

*Start Date:

< 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.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. A blue sidebar on the left contains navigation menus: 'Staff Menu', 'Customer Menu', 'Application Menu', 'Case Notes', 'Universal Services', and 'FAQs'. The main content area is titled 'Add Required Activity Information' and displays details for 'Steve Perry'. The form includes fields for SSN (0503), App LWA (15), and App Date (02/13/2019). It lists 'Created By: Sheila Sloan' and 'Title: TAA'. The 'Service Level' is 'Employment and Case Management', and the 'Activity' is 'Trade Case Management Same Day Service'. The 'Grant' is '17661015-United Workforce Development Board aka Career Link'. The 'Provider' field has a 'Search Providers' button. The 'Start Date' is '10/25/2020'. The 'End Date' is empty. The 'Current Status' is 'Open'. The 'Weekly Hours' is empty. The 'Bridge Program Activity?' is 'No'. There is a 'Comments' text area. At the bottom, there is a 'Confirm' button with the instruction 'Click Confirm when all TAA Services have been completed', a '< Back' button, an 'Additional Info' button, and 'Save' and 'Cancel' buttons.

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.

Search Provider Relationships

Show All

Provider Relationship Name:

Relationship Number: -

Statutory Program: TAA/NAFTA
Title: TAA
Service Level: Employment and Case Management
Activity: Trade Case Management
Start Date: 10/25/2020

Search Return

Click **Save**.

Add Required Activity Information

[Steve Perry](#) [Application Summary](#)

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

Created By: Sheila Sloan
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 * Search Providers
Start Date: 10/25/2020
*End Date: 10/25/2020
*Current Status: Successful Completion
*Weekly Hours: 5
* Bridge Program Activity?: No
Comments: 10/25/2020 Providing case management to participant.

TAA Services Completed: Confirm Click Confirm when all TAA Services have been completed

Additional Info

< Back

Save Cancel

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**.

The screenshot displays the IWDS (Illinois Workforce Development System) 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 that a Case Note must be completed when adding a Same Day Service. Below this is the "Add Case Note" form, which includes fields for "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), and "*Case Note" (11/1/21 Case Management Provided to participant.). A "Save and Return" button is located at the bottom of the form.

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

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

Add Enrolled Service Printable Services Return

3 found Page 1 of 1

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

Page 1 of 1

Add Enrolled Service Printable Services Return

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.

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

Printable Application

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

Services

- List Enrolled Services
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- View TAA Costs

Click on Trade Case Management – TAA.

 **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](#)

Services

[Steve Perry](#) [Application Summary](#)

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

3 found Page 1 of 1

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

Page 1 of 1

Click **Add Additional Episode**.

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](#)

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

Click **Save and Return**.

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](#)

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

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.

Search Applications Home IWDS Illinois Workforce Development System Case Management

Menu

[Staff Menu](#)

[Customer Menu](#)

[Application Menu](#)

Case Notes

[Add Case Notes](#)

[List Case Notes](#)

Universal Services

[Add Local Service](#)

[List All Services](#)

AQs

[I'm Done: Log Off](#)

Services

[Steve Perry](#) [Application Summary](#)

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

3 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
10/25/2020	11/01/2021	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

Page 1 of 1

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.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this is a blue sidebar menu with sections for "Menus", "Case Notes", "Universal Services", and "FAQs". 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. The menu is organized into three columns: "Application", "Profile", and "Services". The "Services" column is highlighted with a red box and contains the following items: "List Enrolled Services", "ITA Characteristics", and "List Part Time/Distance Learning". There is also an "Exit" section with "Exit Summary", "View Wages", and "Performance Impact".

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

Application Menu
Steve Perry Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019
Printable Application

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

Services

- List Enrolled Services
- ITA Characteristics
- List Part Time/Distance Learning

Exit

- Exit Summary
- View Wages
- Performance Impact

Click **Add Enrolled Service**.

Services
Steve Perry Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019

Add Enrolled Service Printable Services Return

0 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
There is nothing to display.				

Page 1 of 1

Add Enrolled Service Printable Services Return

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

Select Title
Steve Perry Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019

*Title: 1DC

< Back Next >

Cancel

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

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: '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 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: 1DC'. The '*Service Level:' dropdown is set to 'Career Services' and the '*Start Date:' is '11/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

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

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: '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 'Select Activity' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: 1DC'. The 'Service Level:' is 'Career Services' and the '*Activity:' dropdown is set to 'Career Planning (Case Management)'. The 'Start Date:' is '11/01/2021'. Navigation buttons include '< Back', 'Next >', and '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.

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

The screenshot shows the IWDS Case Management interface. At the top, there is a navigation bar with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. Below this is a blue sidebar menu with sections for 'Menus', 'Case Notes', 'Universal Services', and 'FAQs'. The main content area is titled 'Add Required Activity Information' and includes the following fields and options:

- Created By:** Sheila Sloan
- Title:** 1DC
- Service Level:** Career Services
- Activity:** Career Planning (Case Management) **Same Day Service**
- *Grant:** 19681015-United Workforce Development Board aka Career Link
- Provider:** *1537-00 Bradley University *
- Start Date:** 11/01/2021
- End Date:** 11/1/2021
- *Current Status:** Successful Completion
- Comments:** 11/1/2021 - Add Dated Comment

At the bottom of the form, there are buttons for '< Back', 'Additional Info', 'Save', and 'Cancel'.

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**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. At the top, there is a red header with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left side, there is a blue navigation menu with the following items: '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 a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.' Below this message is the 'Add Case Note' form. The form includes the following fields: 'Staff Name: Sheila Sloan' (with links for Steve Perry and Application Summary), 'Contact Date: 11/01/2021', 'Program: WIOA' (dropdown menu), '*Note Category: Case Note Supporting Same Day Service' (dropdown menu), '*Confidential: No' (dropdown menu), '*Note Subject: Case Management' (text input field), and '*Case Note: Provided case management to participant today.' (text area with a scroll bar). A 'Save and Return' button is located at the bottom of the form.

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**.

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

Add Enrolled Service Printable Services Return

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	Career Planning (Case Management) - IDC	Successful Completion	Sheila Sloan

Page 1 of 1

Add Enrolled Service Printable Services Return

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.

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

Printable Application

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](#)

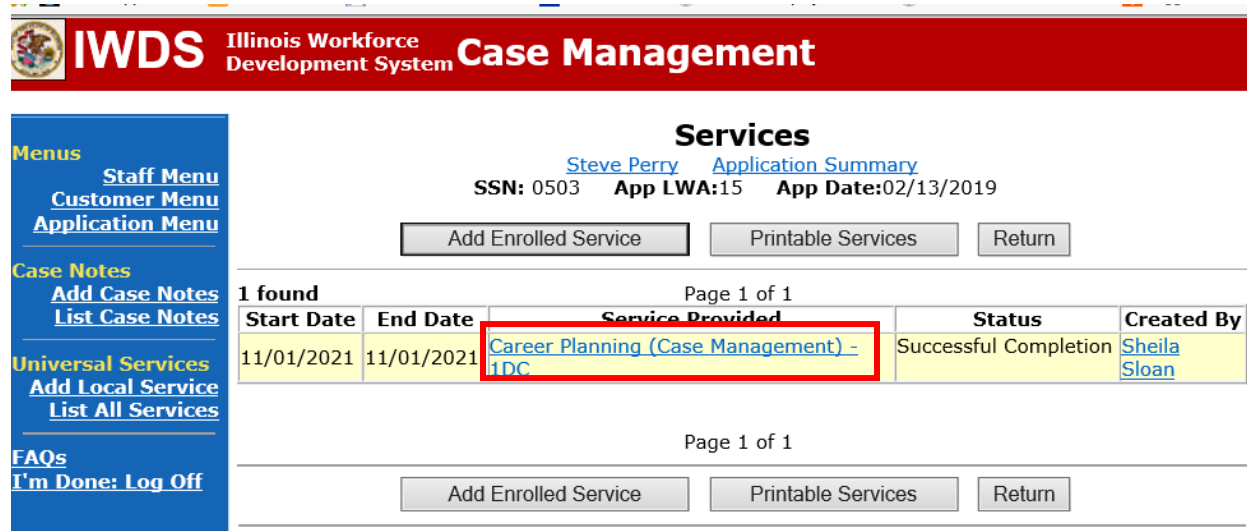
Services

- [List Enrolled Services](#)
- [ITA Characteristics](#)
- [List Part Time/Distance Learning](#)

Exit

- [Exit Summary](#)
- [View Wages](#)
- [Performance Impact](#)

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



The screenshot shows the 'Services' page in the IWDS Case Management system. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. The user is identified as Steve Perry, with SSN: 0503, App LWA:15, and App Date:02/13/2019. A table lists services, with one entry highlighted: 'Career Planning (Case Management) - 1DC' with a status of 'Successful Completion' and created by 'Sheila Sloan'. The page includes navigation buttons like 'Add Enrolled Service', 'Printable Services', and 'Return'.

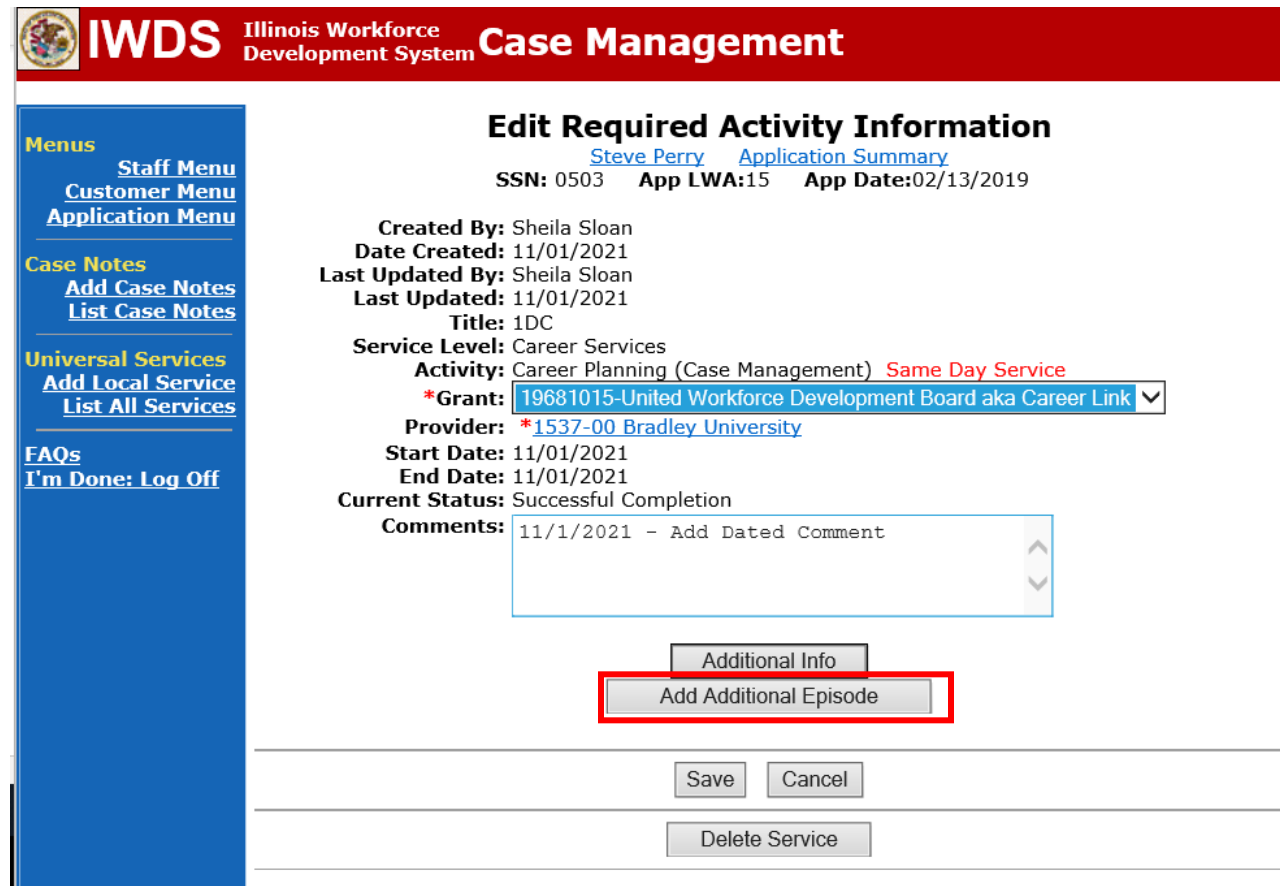
Services
Steve Perry Application Summary
SSN: 0503 App LWA:15 App Date:02/13/2019

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	Career Planning (Case Management) - 1DC	Successful Completion	Sheila Sloan

Page 1 of 1

Click **Add Additional Episode**.



The screenshot shows the 'Edit Required Activity Information' page in the IWDS Case Management system. The user is identified as Steve Perry, with SSN: 0503, App LWA:15, and App Date:02/13/2019. The page displays details for a service episode, including 'Created By: Sheila Sloan', 'Date Created: 11/01/2021', 'Last Updated By: Sheila Sloan', 'Last Updated: 11/01/2021', 'Title: 1DC', 'Service Level: Career Services', 'Activity: Career Planning (Case Management) Same Day Service', '*Grant: 19681015-United Workforce Development Board aka Career Link', 'Provider: *1537-00 Bradley University', 'Start Date: 11/01/2021', 'End Date: 11/01/2021', and 'Current Status: Successful Completion'. A comment field contains '11/1/2021 - Add Dated Comment'. The 'Add Additional Episode' button is highlighted with a red box.

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: 1DC
Service Level: Career Services
Activity: Career Planning (Case Management) Same Day Service
*Grant: 19681015-United Workforce Development Board aka Career Link
Provider: *1537-00 Bradley University
Start Date: 11/01/2021
End Date: 11/01/2021
Current Status: Successful Completion
Comments: 11/1/2021 - Add Dated Comment

Additional Info
Add Additional Episode

Save Cancel
Delete Service

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**.

The screenshot shows the IWDS (Illinois Workforce Development System) Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". On the left is a blue sidebar menu with sections for "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 has 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 the message is the "Add Case Note" form. The form includes: "Staff Name: Steve Perry" and "Application Summary" (links); "Staff Name: Sheila Sloan"; "*Contact Date:" with a text box containing "11/01/2021"; "Program:" with a dropdown menu showing "WIOA"; "*Note Category:" with a dropdown menu showing "Case Note Supporting Same Day Service"; "*Confidential:" with a dropdown menu showing "No"; "*Note Subject:" with a text box containing "Case Management"; and "*Case Note:" with a large text area containing "11/1/21 Case Management for participant". At the bottom of the form is a "Save and Return" button.

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.

For **Remedial Training Service Records**, a separate record must be entered for each course being taken. In addition, the **Comment Box** on each **Remedial Training Service Record** must contain the name of the specific course and the semester it is being taken.

Enter **Remedial Training Service Records** by:

Select **List Enrolled Services** on the **Application Menu** for the participant.

Case Management

Application Menu

[Steve Perry](#) [Application Summary](#)

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

Printable Application

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](#)

Services

- [List Enrolled Services](#)
- [List Part Time/Distance Learning](#)

Exit

- [Exit Summary](#)
- [View Wages](#)
- [View TAA Costs](#)

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](#)

Click **Add Enrolled Service**.

 **IWDS** Illinois Workforce Development System **Case Management**

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

Add Enrolled Service Printable Services Return


6 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/01/2021		Occupational Skills Training - TAA	Open	Sheila Sloan
12/01/2021		Travel in Training - TAA	Open	Sheila Sloan
11/01/2021	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
10/25/2020	11/01/2021	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

Page 1 of 1

Add Enrolled Service Printable Services Return

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

 **IWDS** Illinois Workforce Development System **Case Management**

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

*Title: ▼

< Back Next >

Cancel


Select **Job Training** from the drop down for **Service Level**.
Enter **Start Date** of the **Remedial Training**.
Click **Next**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue navigation menu with categories: 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 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: TAA'. The '*Service Level:' dropdown is set to 'Job Training'. The '*Start Date:' field is empty. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Click **Next**.

The screenshot shows the IWDS Case Management interface. The header includes the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue navigation menu with categories: 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 'Select Activity' and includes links for 'Steve Perry' and 'Application Summary'. It displays 'SSN: 0503 App LWA:15 App Date:02/13/2019' and 'Title: TAA'. The 'Service Level:' is 'Job Training'. The '*Activity:' dropdown is set to 'Remedial Training'. The 'Start Date:' is '12/01/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'.

Select **No** from the drop down for **ITA Funded Training**.

 **IWDS** Illinois Workforce Development System **Case Management**

Select Training Type

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

Title: TAA
Service Level: Job Training
Activity: Remedial Training
* ITA Funded Training:
Start Date: 12/01/2021

Menu
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

FAQs
[System Done: Log Off](#)

Select the current active grant number for your local area from the drop down for **Grant**.
Click on **Search Providers** to select the provider of the training.

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](#)

Add Required Activity Information

[Steve Perry](#) [Application Summary](#)

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

Created By: Sheila Sloan

Title: TAA

Service Level: Job Training

Activity: Remedial Training

*Grant: 17661015-United Workforce Development Board aka Career Link

ITA Funded Training: No

Provider: * * Search Providers

*CIP Code: Search

* O*Net Code: Search Requires O*Net

Start Date: 12/01/2021

*Planned End Date:

End Date:

Current Status: Pending Approval

*Weekly Hours:

*Bridge Program Activity? No

Comments:

TAA Services Completed: Confirm Click Confirm when all TAA Services have been completed

Additional Info

< Back

Save Cancel

Enter the **Provider Relationship Name** or click **Show All**.
Click **Search**.

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](#)

Search Provider Relationships

Provider Relationship Name:

Relationship Number: -

Statutory Program: TAA/NAFTA
 Title: TAA
 Service Level: Job Training
 Activity: Remedial Training
 Start Date: 12/01/2021

Click **Pick** beside the name of the training provider.

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

5 found
Page 1 of 2

	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

Click **Search** to the right of **CIP Code** to search for the CIP Code for the training.

**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](#)

Add Required Activity Information

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

Created By: Sheila Sloan
Title: TAA
Service Level: Job Training
Activity: Remedial Training
***Grant:** 17661015-United Workforce Development Board aka Career Link ▼

ITA Funded Training: No
Provider: *1537-00 Bradley University *

***CIP Code:**

*** O*Net Code:** Requires O*Net

Start Date: 12/01/2021
***Planned End Date:**
End Date:
Current Status: Pending Approval
***Weekly Hours:**

***Bridge Program Activity?** No ▼
Comments:

TAA Services Completed: Click Confirm when all TAA Services have been completed

Enter the type of Remedial Training (Math or Reading) in the Occupation Box.
Click Search.

 **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](#)

Welcome to the **CIP Codes Finder**. Enter the name of your occupation or a skill you possess or leave blank to search for all Occupations.

(Example: Enter 'computer' for computer-related skills or 'weld' to find skills for 'welding'.)

Occupation:

- [Agriculture, Agriculture Operations, And Related Sciences](#)
- [Architecture And Related Services](#)
- [Area, Ethnic, Cultural, Gender, and Group Studies.](#)
- [Basic Skills and Developmental/Remedial Education.](#)
- [Biological And Biomedical Sciences](#)
- [Business, Management, Marketing, And Related Support Services](#)
- [Citizenship Activities](#)
- [Communication, Journalism, And Related Programs](#)
- [Communications Technologies/ Technicians And Support Services](#)
- [Computer And Information Sciences And Support Services](#)
- [Construction Trades](#)
- [Education](#)
- [Engineering](#)
- [Engineering Technologies and Engineering-Related Fields.](#)
- [English Language And Literature/ Letters.](#)
- [Family And Consumer Sciences/Human Sciences](#)
- [Foreign Languages, Literatures, And Linguistics](#)
- [Health Professions And Related Programs.](#)
- [Health- Related Knowledge And Skills](#)
- [High School/ Secondary Diplomas And Certificates](#)
- [History](#)
- [Homeland Security, Law Enforcement, Firefighting and Related Protective Services.](#)
- [Interpersonal And Social Skills](#)
- [Leisure And Recreational Activities](#)
- [Liberal Arts And Sciences, General Studies, And Humanities](#)
- [Library Science](#)
- [Mathematics And Statistics](#)
- [Mechanic And Repair Technologies/ Technicians](#)
- [Military Science, Leadership and Operational Art.](#)
- [Military Technologies and Applied Sciences.](#)
- [Multi-/Interdisciplinary Studies, General.](#)
- [Natural Resources And Conservation](#)
- [Parks, Recreation, Leisure And Fitness Studies](#)
- [Personal And Culinary Services](#)
- [Personal Awareness And Self-Improvement](#)
- [Philosophy and Religious Studies, General.](#)
- [Physical Sciences](#)
- [Precision Production](#)
- [Psychology](#)
- [Public Administration And Social Service Professions](#)
- [Residency Programs.](#)
- [Science Technologies/Technicians, General.](#)
- [Social Sciences](#)
- [Technology Education/ Industrial Arts](#)
- [Theology And Religious Vocations](#)
- [Transportation And Materials Moving](#)
- [Visual And Performing Arts](#)

Click **Pick** beside the training the participant is enrolling in.

The screenshot shows the IWDS Case Management interface. At the top, there is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header, there is a search bar with "Occupation: Remedial Math" and a "Search" button. A table below the search bar shows a single result: "Developmental/Remedial Mathematics." with a "Pick" button and the case number "320104". Below the table are "Return to Finder" and "Cancel" buttons. On the left side, there is a blue sidebar menu with options like "Staff Menu", "Customer Menu", "Application Menu", "Case Notes", "Add Case Notes", and "List Case Notes".

Click **Search** to the right of **O*Net Code** to search for the O*Net Code for the training.

The screenshot shows the "Add Required Activity Information" form in the IWDS Case Management system. The header is red with the IWDS logo and "Illinois Workforce Development System Case Management". The form title is "Add Required Activity Information" with links for "Steve Perry" and "Application Summary". The form contains the following fields and options: "SSN: 0503", "App LWA:15", "App Date:02/13/2019", "Created By: Sheila Sloan", "Title: TAA", "Service Level: Job Training", "Activity: Remedial Training", "*Grant: 17661015-United Workforce Development Board aka Career Link" (dropdown menu), "ITA Funded Training: No", "Provider: *1537-00 Bradley University" (with a "Search Providers" button), "*CIP Code: 320104" (with a "Search" button), "CIP Description: Developmental/Remedial Mathematics.", "*O*Net Code:" (with a "Search" button and the text "Requires O*Net"), "Start Date: 12/01/2021", "*Planned End Date:" (text input), "End Date:" (text input), "Current Status: Pending Approval", "*Weekly Hours:" (text input), "*Bridge Program Activity? No" (dropdown menu), "Comments:" (text area), "TAA Services Completed: Confirm" (button with the text "Click Confirm when all TAA Services have been completed"), "< Back" (button), "Additional Info" (button), "Save" (button), and "Cancel" (button). The left sidebar menu is the same as in the previous screenshot.

The **O*Net Code** for **Remedial Training** must match the **O*Net Code** for the **Occupational Skills Training** if the participant is enrolled in or will be enrolling in **Occupational Skills Training**.

The **Occupation** entered will be determined based on whether the participant is enrolled in or will be enrolling in **Occupational Skills Training**.

Welcome to the **O*Net Codes Finder**. Enter the name of your occupation or a skill you possess or leave blank to search for all Occupations.
(Example: Enter 'computer' for computer-related skills or 'weld' to find skills for 'welding'.)

Occupation:

- [Architecture and Engineering Occupations](#)
- [Arts, Design, Entertainment, Sports, and Media Occupations](#)
- [Building and Grounds Cleaning and Maintenance Occupations](#)
- [Business and Financial Operations Occupations](#)
- [Community and Social Services Occupations](#)
- [Computer and Mathematical Occupations](#)
- [Construction and Extraction Occupations](#)
- [Education, Training, and Library Occupations](#)
- [Farming, Fishing, and Forestry Occupations](#)
- [Food Preparation and Serving Related Occupations](#)
- [Healthcare Practitioners and Technical Occupations](#)
- [Healthcare Support Occupations](#)
- [Installation, Maintenance, and Repair Occupations](#)
- [Legal Occupations](#)
- [Life, Physical, and Social Science Occupations](#)
- [Management Occupations](#)
- [Military Specific Occupations](#)
- [Office and Administrative Support Occupations](#)
- [Personal Care and Service Occupations](#)
- [Production Occupations](#)
- [Protective Service Occupations](#)
- [Sales and Related Occupations](#)
- [Transportation and Material Moving Occupations](#)

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Click **Pick** beside the type of occupation the participant is training for.

Occupation:

<input type="button" value="Pick"/>	Bookkeeping, Accounting, and Auditing Clerks	433031	Growth
-------------------------------------	--	--------	--------

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Enter the **Planned End Date** of the training

Enter the **Weekly Hours** the participant is scheduled to attend the **Remedial Training**.

Bridge Program Activity should be No unless the participant is specifically enrolled in a Bridge Program.

In the **Comments** Box enter the course name and number for the **Remedial Training** being taken by the participant. If the participant is attending multiple semesters of the same type of **Remedial Training**, enter the course name and number and the semester each one will be taken.

Click **Save**.

The screenshot shows the 'Add Required Activity Information' form in the IWDS Case Management system. The form is titled 'Add Required Activity Information' and includes the following fields and options:

- Created By:** Sheila Sloan
- Title:** TAA
- Service Level:** Job Training
- Activity:** Remedial Training
- *Grant:** 17661015-United Workforce Development Board aka Career Link (dropdown menu)
- ITA Funded Training:** No
- Provider:** *1537-00 Bradley University* (with a 'Search Providers' button)
- *CIP Code:** 320104 (with a 'Search' button)
- CIP Description:** Developmental/Remedial Mathematics.
- *O*Net Code:** 433031 (with a 'Search' button and 'Requires O*Net' text)
- Start Date:** 12/01/2021
- *Planned End Date:** 05/12/2022
- End Date:** Pending Approval
- Current Status:** Pending Approval
- *Weekly Hours:** 4
- *Bridge Program Activity?:** No (dropdown menu)
- Comments:** Math 099 (text area)
- TAA Services Completed:** Confirm (button) *Click Confirm when all TAA Services have been completed*

Navigation buttons include '< Back', 'Additional Info', 'Save', and 'Cancel'.

The Remedial Training Service Record is now in a Pending Approval Status.

Informational Message:
The record has been added.

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

Add Enrolled Service Printable Services Return

8 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/01/2021		Occupational Skills Training - TAA	Open	Sheila Sloan
12/01/2021		Travel in Training - TAA	Open	Sheila Sloan
12/01/2021		Prerequisite Training - TAA	Pending Approval	Sheila Sloan
12/01/2021		Remedial Training - TAA	Pending Approval	Sheila Sloan
11/01/2021	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
10/25/2020	11/01/2021	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

Page 1 of 1

Add Enrolled Service Printable Services Return

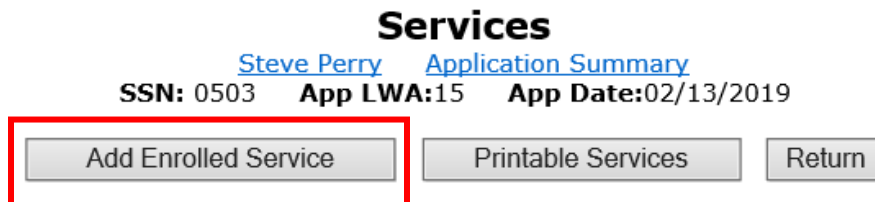
If the participant is eligible for travel/subsistence reimbursements, the career planner must enter the **Travel in Training** or **Subsistence in Training Service Record** following these steps:

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



The screenshot shows the 'Application Menu' for Steve Perry (SSN: 0503, App LWA:15, App Date:02/13/2019). The menu is divided into several sections: '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), 'Services' (List Enrolled Services, List Part Time/Distance Learning), and 'Exit' (Exit Summary, View Wages, View TAA Costs). A red box highlights the 'List Enrolled Services' link in the Services section.

Click **Add Enrolled Service**.



The screenshot shows the 'Services' page for Steve Perry (SSN: 0503, App LWA:15, App Date:02/13/2019). There are three buttons: 'Add Enrolled Service' (highlighted with a red box), 'Printable Services', and 'Return'.

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



The screenshot shows the 'Select Title' page for Steve Perry (SSN: 0503, App LWA:15, App Date:02/13/2019). The 'Title' dropdown menu is set to 'TAA' and is highlighted with a red box. There are three buttons: '< Back', 'Next >' (highlighted with a red box), and 'Cancel'.

Select **Job Training** for **Service Level**.

Enter **Start Date**. The start date should be the date the training will begin.

Click **Next**.

The screenshot shows the IWDS Case Management interface. The header is red with the IWDS logo and the text 'Illinois Workforce Development System Case Management'. On the left is a blue sidebar menu with categories: 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 'Select Service Level and Start Date' and includes links for 'Steve Perry' and 'Application Summary'. It displays the user's SSN (0503), App LWA (15), and App Date (02/13/2019). The 'Title' is set to 'TAA'. The '*Service Level' dropdown is set to 'Job Training'. The '*Start Date' is '12/1/2021'. Navigation buttons include '< Back', 'Next >', and 'Cancel'. A copyright notice at the bottom states: 'Copyright 2004 by the State of Illinois. Using this web site indicates acceptance of DCEO User Agreement and IWDS Privacy Notice.'

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

Click **Next**.

This screenshot shows the 'Select Activity' screen in the IWDS Case Management system. The header and sidebar are identical to the previous screenshot. The main content area is titled 'Select Activity' and shows the same user information (SSN: 0503, App LWA: 15, App Date: 02/13/2019) and title (TAA). The 'Service Level' is 'Job Training'. The '*Activity' dropdown is now set to 'Travel in Training'. The 'Start Date' is '12/01/2021'. The navigation buttons '< Back', 'Next >', and 'Cancel' are present.

Click on **Select Provider**

IWDS Illinois Workforce Development System **Case Management**

Add Required Activity Information
[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

Created By: Sheila Sloan
Title: TAA
Service Level: Job Training
Activity: Travel in Training
***Grant:** 17661015-United Workforce Development Board aka Career Link ▼
Provider: * *
Start Date: 12/01/2021
End Date:
Current Status: Pending Approval
Comments:

TAA Services Completed: Click Confirm when all TAA Services have been completed

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](#)

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

IWDS Illinois Workforce Development System **Case Management**

Search Provider Relationships

Provider Relationship Name:
Relationship Number: -
Statutory Program: TAA/NAFTA
Title: TAA
Service Level: Job Training
Activity: Travel in Training
Start Date: 12/01/2021

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

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**

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](#)

Add Required Activity Information

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


Created By: Sheila Sloan
Title: TAA
Service Level: Job Training
Activity: Travel in Training
***Grant:** [17661015-United Workforce Development Board aka Career Link](#) ▼
Provider: *[1537-00 Bradley University](#)* [Search Providers](#)
Start Date: 12/01/2021
End Date:
Current Status: Pending Approval
Comments:

TAA Services Completed: [Confirm](#) Click Confirm when all TAA Services have been completed

[Additional Info](#)

[< Back](#)

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

 **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](#)

Informational Message:
The record has been added.

Services

[Steve Perry](#) [Application Summary](#)

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

6 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
12/01/2021		Occupational Skills Training - TAA	Open	Sheila Sloan
12/01/2021		Travel in Training - TAA	Pending Approval	Sheila Sloan
11/01/2021	11/01/2021	Trade Case Management - TAA	Successful Completion	Sheila Sloan
10/25/2020	11/01/2021	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

Page 1 of 1

December 14, 2021

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Remedial Training Instructions

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).

IWDS Illinois Workforce Development System **Case Management**

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

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](#)

Services

- [List Enrolled Services](#)
- [List Part Time/Distance Learning](#)

Exit

- [Exit Summary](#)
- [View Wages](#)
- [View TAA Costs](#)

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](#)

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**.

Upload Document

Path: Browse...

Type:

Copyright Privacy

- 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 using the following format (if, it is a revision, forward the last state merit staff approval):

1.

PART-TIME/DISTANCE LEARNING

If the **Remedial 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**

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

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[List All Services](#)

FAQs
[I'm Done: Log Off](#)

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](#)

Services

- [List Enrolled Services](#)
- [List Part Time/Distance Learning](#)

Exit

- [Exit Summary](#)
- [View Wages](#)
- [View TAA Costs](#)

To add a Part Time Indicator:

Click **Add Part Time/Distance Learning**

- Menus**
 - [Staff Menu](#)
 - [Customer Menu](#)
 - [Application Menu](#)
- Case Notes**
 - [Add Case Notes](#)
 - [List Case Notes](#)
- Universal Services**
 - [Add Local Service](#)
 - [List All Services](#)
- FAQs**

Part Time/Full Time - Distance Learning History

[Steve Perry](#) [Application Summary](#)

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

Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
There are no records at this time.						

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

- Menus**
 - [Staff Menu](#)
 - [Customer Menu](#)
 - [Application Menu](#)
- Case Notes**
 - [Add Case Notes](#)
 - [List Case Notes](#)
- Universal Services**
 - [Add Local Service](#)

Part Time/Full Time - Distance Learning Detail

[Steve Perry](#) [Application Summary](#)

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

*Status Type:

*Start Date:

*Status:

Click **Save**.

- Menus**
 - [Staff Menu](#)
 - [Customer Menu](#)
 - [Application Menu](#)
- Case Notes**
 - [Add Case Notes](#)
 - [List Case Notes](#)
- Universal Services**
 - [Add Local Service](#)
 - [List All Services](#)

Part Time/Full Time - Distance Learning Detail

[Steve Perry](#) [Application Summary](#)

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

*Status Type:

*Start Date:

*Status:

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

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning History
[Steve Perry](#) [Application Summary](#)
 SSN: 0503 App LWA:15 App Date:02/13/2019

Add Part Time/Distance Learning Return

	Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
View	12/01/2021	Part Time Training	Y	N	Sheila Sloan	12/02/2021	12/02/2021

Add Part Time/Distance Learning Return

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To add a **Distance Learning Indicator**:

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

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning History
[Steve Perry](#) [Application Summary](#)
 SSN: 0503 App LWA:15 App Date:02/13/2019

Add Part Time/Distance Learning Return

	Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
There are no records at this time.							

Add Part Time/Distance Learning Return

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Select **Distance Learning** for **Status Type**.

Enter the date the distance learning begins under **Start Date**

Select **Yes** for **Status**.

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning Detail
[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

*Status Type:
*Start Date:
*Status:

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

Click **Save**.

IWDS Illinois Workforce Development System **Case Management**

Part Time/Full Time - Distance Learning Detail
[Steve Perry](#) [Application Summary](#)
SSN: 0503 App LWA:15 App Date:02/13/2019

*Status Type:
*Start Date:
*Status:

Menus
[Staff Menu](#)
[Customer Menu](#)
[Application Menu](#)

Case Notes
[Add Case Notes](#)
[List Case Notes](#)

Universal Services
[Add Local Service](#)
[List All Services](#)

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

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](#)

Part Time/Full Time - Distance Learning History

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

	Date	Type	Status	Deleted?	Last Updated By	Date Created	Date Updated
<input type="button" value="View"/>	12/01/2021	Distance Learning	Y	N	Sheila Sloan	12/02/2021	12/02/2021
<input type="button" value="View"/>	12/01/2021	Part Time Training	Y	N	Sheila Sloan	12/02/2021	12/02/2021

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 Remedial 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 Remedial 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:

2. Review the email, IWDS entries, and uploaded documents to ensure all entries are made as required and all documents are complete.
3. If issues are found, state merit staff will email the career planner and inform him/her of the issues that need addressed.
4. 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.
5. State merit staff will review corrections.
6. 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.
7. If approval is not possible and the request is denied, state merit staff will direct the career planner on the next steps to take.