

December 11, 2023



Local System Administrator Training

Editing IWDS Client Screens

Acronyms used in this presentation

DCEO – Department of Commerce and Economic Opportunity

OET – DCEO Office of Employment and Training

IWDS – Illinois Workforce Development System

IwNC – Illinois workNet Center

LSA – Local System Administrator

Local System Administrator Training - Editing IWDS Client Screens



Overview

This training is not meant to be a substitute for the WIOA training series offered by OET.

This training is about what a Local System Administrator can change/edit on client screens after the client has been certified and how to submit for client modifications that need assistance from OET.

Overview

Please be aware that just because something can be changed doesn't always mean it should be changed.

The LSA needs to be aware of how certain changes to a client record can affect client eligibility before making any alterations or submitting for modification.

The LSA could be changing an item that was the only thing that made the client eligible for Basic Skills Deficient or Low Income or for particular titles that already have services.

IWDS Client Levels

IWDS has 2 distinct levels for client data entry.

The **Customer Level** is where the most up to date information is stored. There is only one Customer Level record per client. An IWDS user can also manually update the Customer Level data at any time.

If a new application is added to an existing client, the client information from the newest application will overwrite the existing Customer Level customer profile data.

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[Ruth Aaron](#)

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- [View Wages](#)

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Referrals

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Local System Administrator Training - Editing IWDS Client Screens



IWDS Client Levels

The **Customer Level** is where the career planner would record any changes in the customer record after certification.

Address updates, legal name changes (marriage, divorce, other), new phone number, new email address, new job, and any other changes that occur after the application record was certified would be recorded here.

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IWDS Client Levels

The one exception to the “snapshot in time” rule is Selective Service.

If your client is a male who is under 18 at the time of certification, who then registers with Selective Service after the certification date, the Selective Service Number **has to be added** to the Application Level (which will then update the Customer Level automatically).

You will need to contact the IWDS System Administrators to update the Selective Service.

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IWDS Client Levels

The **Application Level** is where the client services are recorded.

A client can have multiple Application Level records. The client could be co-enrolled, or they could have pre-existing Inquirant or Exiter records.

List Applications

[Ruth Aaron](#)

Add Application

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	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
View	Aaron, Ruth	***-**- 7547	05/01/2020	WIOA	Registrant		Chris Daniels
View	Mays, Ruth	***-**- 7547	07/01/2019	WIOA	Inquirant		Chris Daniels
View	Mays, Ruth	***-**- 7547	04/30/2011	WIOA	Exiter		Chris Daniels
View	Musial, Ruth	***-**- 7547	07/05/2015	WIOA	Applicant		Chris Daniels

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IWDS Client Levels

Each Application Level record is a “Snapshot in time”. Each Application should have the client’s correct information **AT THE DATE/TIME OF THE APPLICATION.**

So, if this client got married, moved, or had any other changes after the 5/1/2020 App Date, then the updated information would go on the Customer Level, as the Application Level was accurate on 5/1/2020.

List Applications

[Ruth Aaron](#)

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	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
View	Aaron, Ruth	***-**- 7547	05/01/2020	WIOA	Registrant		Chris Daniels
View	Mays, Ruth	***-**- 7547	07/01/2019	WIOA	Inquirant		Chris Daniels
View	Mays, Ruth	***-**- 7547	04/30/2011	WIOA	Exiter		Chris Daniels
View	Musial, Ruth	***-**- 7547	07/05/2015	WIOA	Applicant		Chris Daniels

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IWDS Client Levels

Notice that this client has different last names. This is very common in IWDS, especially for (but not limited to) female clients.

In this case its very likely she was single, then married, divorced, and then married again.

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View	Aaron, Ruth	***-**- 7547	05/01/2020	WIOA	Registrant		Chris Daniels
View	Mays, Ruth	***-**- 7547	07/01/2019	WIOA	Inquirant		Chris Daniels
View	Mays, Ruth	***-**- 7547	04/30/2011	WIOA	Exiter		Chris Daniels
View	Musial, Ruth	***-**- 7547	07/05/2015	WIOA	Applicant		Chris Daniels

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IWDS Client Levels

Question: if Ruth Aaron legally changed her name back to Ruth Mays due to a life event (divorce) on 9/1/2023 while still enrolled as a Registrant in IWDS, what needs to happen in IWDS (besides a case note)?

- 1- change the name on the current application
- 2- change the name on all applications
- 3- change the name on the customer level
- 4- nothing

List Applications

[Ruth Aaron](#)

Add Application

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	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
View	Aaron, Ruth	***-**- 7547	05/01/2020	WIOA	Registrant		Chris Daniels
View	Mays, Ruth	***-**- 7547	07/01/2019	WIOA	Inquirant		Chris Daniels
View	Mays, Ruth	***-**- 7547	04/30/2011	WIOA	Exiter		Chris Daniels
View	Musial, Ruth	***-**- 7547	07/05/2015	WIOA	Applicant		Chris Daniels

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IWDS Client Levels

Answer: Change the name on the Customer Level. Go to Customer menu, click on Contact Information, and update the last name there.

- 1- change the name on the current application
- 2- change the name on all applications
- 3- **change the name on the customer level**
- 4- nothing

Customer Menu

[Ruth Aaron](#)

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- [Employment History](#)
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Applications

- [List Applications](#)

Contact Information

[Ruth Aaron](#)

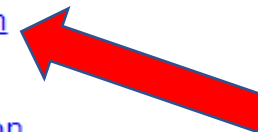
SSN: 7547

* First Name:

Middle Initial:

* Last Name:

Street Address:



IWDS Client Records

Sometimes when a client comes into an LWIA, the career planner may forget to search for an existing IWDS record for the client or they may not find the existing record due to a name change or a spelling error. So they create a duplicate IWDS client record.

Usually, what will happen is the career planner will get an error on the SSN when they try to save the new record. If this happens, the LSA should instruct the career planner to try 4 simple searches.

Searching IWDS Client Records

There are 4 simple searches that will find 99.9% of existing IWDS clients. The 4 searches will take approximately 2 minutes to complete and can be done for Customer Level and Application Level.

We are going to use sample client Justina Thompson for the examples.

How to search for clients in IWDS

Sample Client: **Justina Thompson**
DOB 6/5/1991
SSN 366-12-3456

Searching IWDS Client Records

1) Partial Last Name and Last 4 SSN

The reason we recommend partial names is that the search function will look for what you type in.

If the client's name is marK, but you search for marC, it will not be in the results.

But a search for mar will return both mark, marc, markus, marcus, marchand, marcel, etc...

1) The first search I would do is a partial last name and last 4 SSN:

Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

Searching IWDS Client Records

2) Partial Last Name and Partial First Name (with or without Last 4 SSN)

By adding more search field criteria, it will reduce the results to a list of more concentrated specific results.

2) If the results are too large (too many pages), then I would do partial last name, partial first name, and last 4 SSN:

Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

Searching IWDS Client Records

3) Last 4 SSN and Birth Date

4) Partial First Name and Last 4 SSN

These last two searches are essential if you think there could be a legal name change (especially if the client is female – much more likely to have a legal name change with a marriage or divorce).

You can have 1 client with multiple applications with different last names.

3) If you think there has been a legal name change, another option would be Last 4 SSN and Birth Date:

Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

4) Or partial first name and Last 4 SSN:

Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

Searching IWDS Client Records

If you discover that a client has multiple client level records and you are positive they are for the same person, there are 2 choices: delete the bad record(s) or request to merge the records.

List Customers

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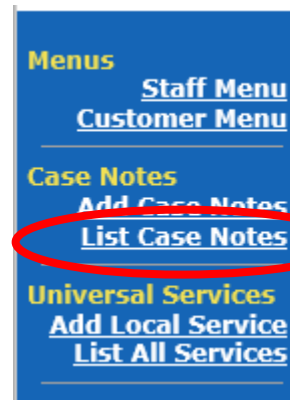
	Name	SSN	Address	Applications	LWA
<input type="button" value="View"/>	Masten BACILIO, JESUS		, IL 61102	0	
<input type="button" value="View"/>	Masten BACILIO, JESUS	***_**- 5473	, IL 61102	0	

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Merging/Deleting Multiple IWDS Client Records

If the “bad record” has Case Notes or Universal Services, then OET recommends requesting a “merge”.

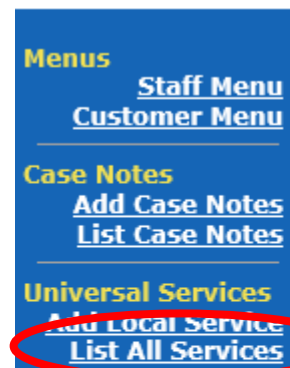
If there are no case notes or services, then request a “delete”.



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

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

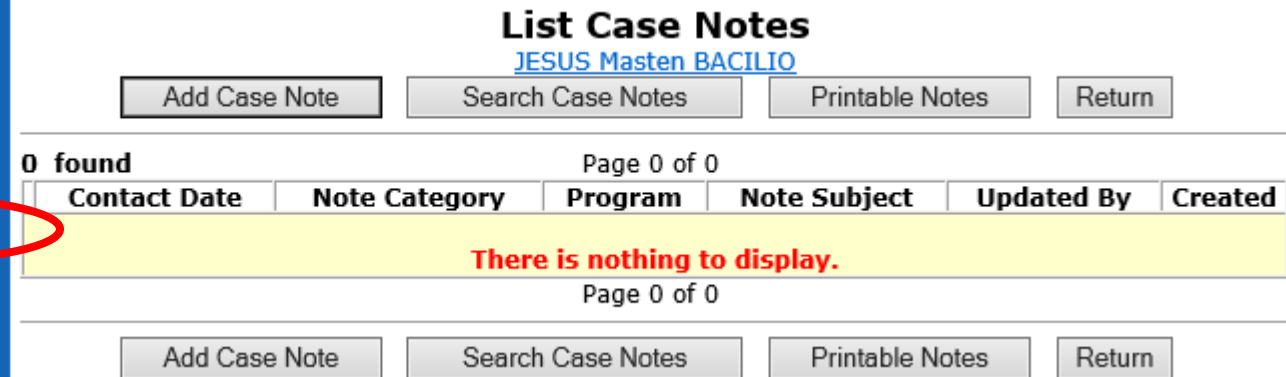
Universal Services
[Add Local Service](#)
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Menus
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Case Notes
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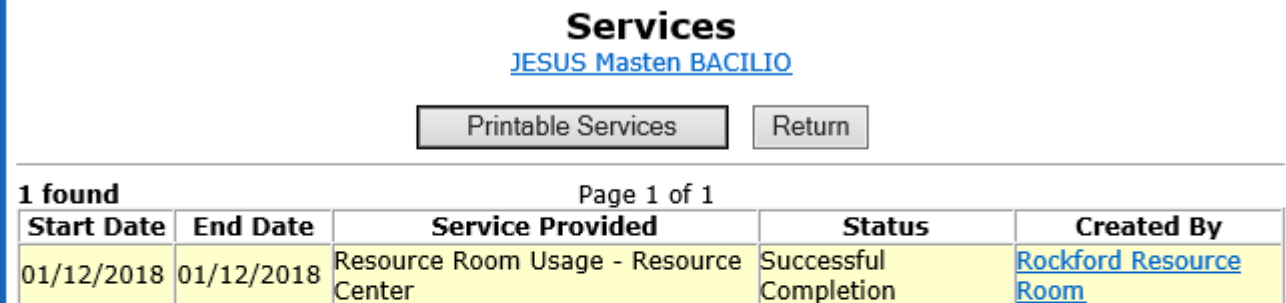
List Case Notes

[JESUS Masten BACILIO](#)

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Contact Date	Note Category	Program	Note Subject	Updated By	Created
There is nothing to display.					

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Services

[JESUS Masten BACILIO](#)

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Start Date	End Date	Service Provided	Status	Created By
01/12/2018	01/12/2018	Resource Room Usage - Resource Center	Successful Completion	Rockford Resource Room

Merging/Deleting Multiple IWDS Client Records

To request to merge or delete the client records, the LSA will need to send an email to the IWDS System Administrators **with a screen shot of the customer records** (*like the example on the right*) and detail which record has the customer level information you want to keep on the merged record or which records to delete from IWDS.

List Customers

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	Name	SSN	Address	Applications	LWA
<input type="button" value="View"/>	Masten BACILIO, JESUS		, IL 61102	0	
<input type="button" value="View"/>	Masten BACILIO, JESUS	***_**- 5473	, IL 61102	0	

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Questions

Are there any questions on
Searching for IWDS clients
or
Merging/Deleting IWDS client records?

Making Corrections to IWDS Clients

There are 4 different stages for an Application Level record:

- 1) **Inquirant** – Application started, but not certified
- 2) **Applicant** – Application certified, but no services entered
- 3) **Registrant** – Application certified, at least one service entered
- 4) **Exiter** – application certified, client services all closed, exit screen completed

List Applications

[Ruth Aaron](#)

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View	Aaron, Ruth	***-**- 7547	07/01/2019	WIOA	Inquirant		Chris Daniels
View	Aaron, Ruth	***-**- 7547	07/05/2015	WIOA	Applicant		Chris Daniels
View	Aaron, Ruth	***-**- 7547	04/30/2011	WIOA	Exiter		Chris Daniels

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Making Corrections to IWDS Clients

If the application is still in Inquirant status, the career planner can edit the client themselves as none of the fields will be locked.

List Applications
[Bobbi Fieri](#)

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	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
View	Fieri, Bobbi	***_**- 0231	03/01/2021	WIOA	Inquirant		Chris Daniels - career planner

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Making Corrections to IWDS Clients

If the application is in Applicant or Registrant status, the LSA and/or the Career Planner can only edit unlocked fields. The LSA will be able to edit more fields than an IWDS user with the case manager supervisor or career planner roles.

Any locked fields will require an IWDS Modification Request form. There will be an example of this form later in the presentation.

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[Bobbi Fieri](#)

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	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
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	Name	SSN	App Date	Program	Status	TAA Status	Career Planner
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Making Corrections to IWDS Clients

The Local System Administrator can edit fields, delete services, even delete eligibility certifications in an application.

Application Menu

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 **App LWA:15** **App Date:03/01/2021**

Printable Application

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- [Application Definition](#)
- [Assessment Summary](#)
- [Concurrent Programs](#)
- [Characteristics and Barriers](#)
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- [Income Calculation](#)
- [Dislocated Worker Characteristics](#)
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- [List Part Time/Distance Learning](#)

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- [Performance Impact](#)

Making Corrections to IWDS Clients

On the Application Definition screen, the LSA can change the IwNC or the assigned Career Planner with the options in the dropdowns.

The only choices available in these 2 dropdown menus will be specific to the LWIA where the client is assigned.

Application Definition
[Bobbi Fieri](#)

Statutory Program: WIOA

TAA Petition Number: - [Verify TAA Petition Number](#)

TAA Act:

NAFTA Petition Number: - [Verify NAFTA Petition Number](#)

LWA: 15 - United Workforce Development Board aka Career Link

***Illinois workNet(TM) Center:** Career Link - Tazewell County - 200

***Contact Date:**

Partner: 15 - City of Peoria Workforce Development Department

***Career Planner:** Daniels - career planner, Chris

Show on My Applications:

Making Corrections to IWDS Clients

If you try to change the “Contact Date”, the IWDS system will not allow the new date to be greater than the application date.

If the client is not showing up in the career planner’s “My Customers” menu, check to be sure the “Show on My Applications” field = Yes

Application Definition
[Bobbi Fieri](#)

Statutory Program: WIOA

TAA Petition Number: - [Verify TAA Petition Number](#)

TAA Act:

NAFTA Petition Number: - [Verify NAFTA Petition Number](#)

LWA: 15 - United Workforce Development Board aka Career Link

*Illinois workNet(TM) Center: Career Link - Tazewell County - 200

*Contact Date:

Partner: 15 - City of Peoria Workforce Development Department

*Career Planner: Daniels - career planner, Chris

Show on My Applications:

Making Corrections to IWDS Clients

From the Application Definition screen, the LSA has the ability to delete the entire Application by clicking the **DELETE** button.

CAUTION – this will delete almost EVERYTHING connected to this application. Services, certification, client data, test data, and more will all be deleted.

This will **not** delete case notes, Universal Services or Customer Level client information.

Application Definition
[Bobbi Fieri](#)

Statutory Program: WIOA

TAA Petition Number: - [Verify TAA Petition Number](#)

TAA Act:

NAFTA Petition Number: - [Verify NAFTA Petition Number](#)

LWA: 15 - United Workforce Development Board aka Career Link

*Illinois workNet(TM) Career Link - Tazewell County - 200


Center:

*Contact Date:

Partner: 15 - City of Peoria Workforce Development Department

*Career Planner: Daniels - career planner, Chris

Show on My Applications:



Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Concurrent Programs screen, the LSA can change all the choices.

Keep in mind, this screen should reflect concurrent programs for the client on the Application Date, not programs added after that date.

Concurrent Programs

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 **App Date:03/01/2021**

WIOA Title II: Adult Education and Family Literacy Act (AEFLA):	No	▼
WIOA Title III: Wagner-Peyser Act (W-P):	No	▼
WIOA Title IV: Vocational Rehabilitation (VR):	No	▼
Job Corps:	No	▼
YouthBuild:	No	▼
Native American Program:	No	▼
Migrant and Seasonal Farmworkers Program (MSFW):	No	▼
Senior Community Services Employment Program (SCSEP):	No	▼
Career & Technical Education (CTE/Perkins) Programs:	No	▼
Trade Adjustment Assistance (TAA):	No	▼
Jobs for Veterans Outreach Programs (DVOP/LVER):	No	▼
Community Services Block Grant (CSBG) E&T Activities:	No	▼
Department of Housing and Urban Development (HUD) E&T Activities:	No	▼
State Unemployment Compensation/Insurance (UI):	No	▼
Second Chance Act Programs:	No	▼
Temporary Assistance for Needy Families Program (TANF):	No	▼
Other Non-WIOA Partner Program:	No	▼

Save Cancel

Making Corrections to IWDS Clients

On the Characteristics and Barriers screen, the LSA cannot change any fields.

Any changes to this screen will require an IWDS Modification Request form.

Characteristics and Barriers

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Drug/Alcohol Dependency:No

English Language Learner:No

Language of Preference:French

Language Other:

Offender, Felon:No

Offender, Misdemeanor:No

Homeless:No

Single Parent Barrier:No

Facing Substantial Cultural Barriers:No

Foster Child:No

Youth Aged Out of Foster Care:No

Cancel

Making Corrections to IWDS Clients

On the Employment Characteristics screen, the LSA can only change the “Tenure” and the “Dependent of a seasonal, or migrant and seasonal farmworker” fields.

Changes to any other field on this screen will require an IWDS Modification Request form.

Employment Characteristics
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Labor Force Status: Unemployed
UI Status: Receiving Benefits
*Tenure:

Primarily Employed in Farm Work: No
Minimum Threshold of Farm Work Performed: No
Migrant Status:

Dependent of a seasonal, or migrant and seasonal farmworker:

Type of Qualifying Farm Work:
Under-Employed:
UI Profilee Date: None
UI Profilee Eligible: No

Making Corrections to IWDS Clients

On the Employment Status – Application screen, the LSA can only change the “Pell Grant Recipient” and the “Pell Grant Amount” fields.

Changes to any other field on this screen will require an IWDS Modification Request form.

Education Status - Application

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Application Highest Grade Completed: Associate Degree

Application Pursuing GED/Diploma/Certificate/Degree? No
Attending Alternative School? No
*Pell Grant Recipient?
Pell Grant Amount:
Attending School? No *Excluding Adult Education*
Full Time Attending School? No
High School Dropout? No
Based on a completed Basic Skills Screening Tool, does the client meet Basic Skills Deficient Criteria? No
Basic Skills Deficient? Yes
Youth In/Out School? N/A

Save

Cancel

Making Corrections to IWDS Clients

On the Tests screens, the LSA can not make any changes to existing tests.

The LSA and the career planner can both add new tests to the application.

If you click “view” on a test, you go to the Maintain Test screen which shows the detail information for the selected test.

Tests
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

	Category	Functional Area	Test	Level	Test Date	PY	EFL	GLE	SS	Gain
<input type="button" value="View"/>	Adult Basic Education-ABE	Reading	TABE 11-12	Difficult	03/01/2021	20	5	10	600	
<input type="button" value="View"/>	Adult Basic Education-ABE	Math	TABE 11-12	Medium	03/01/2021	20	3	5	525	

Skill Type	Date Skill Attained	PY	Comment
There is nothing to display.			

Making Corrections to IWDS Clients

On the Maintain Test screens, the LSA can not make any changes to the test record.

Changes to all fields on the Maintain Test screen or a request to delete a test record will require an IWDS Modification Request form.

Be aware that changes to test dates and test scores could affect eligibility.

Maintain Test

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 **App LWA:**15 **App Date:**03/01/2021

Test Date: 03/01/2021

Category: Adult Basic Education-ABE

Functional Area: Reading

Test: TABE 11-12

Test Level: Difficult *Required for Test TABE 11-12 only*

GLE: 10

Scale Score: 600

Functioning Level: 5-Low Adult Secondary Education-ABE

Comments:

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Making Corrections to IWDS Clients

On the Public Assistance screen, the LSA can only change the “Most Recent Date Referred to Other Federal/State Assistance” field.

Changes to any other field on this screen will require an IWDS Modification Request form.

Be aware that changes to fields on this screen could affect eligibility.

Public Assistance
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Transitional Assistance: No
Refugee Help: No
SSI: No
SSDI: No
On Food Stamp: No
TANF: No
DHS Case #?:
Months Received TANF in Prior 60 months? 0

► **New WIOA Fields**
Long-Term Unemployed at Program Entry? No
Yes = Unemployed at or greater than 27 consecutive weeks
Exhausting TANF Within 2 Years? No
Yes = an individual has 36 or more months of TANF benefits used
Ticket to Work Holder? No
Employment and Training Services Related to SNAP? No
Most Recent Date Referred to Other Federal/State Assistance:

Making Corrections to IWDS Clients

On the Family Characteristics and List Family screens, the LSA cannot change any fields.

Any changes to this screen including adding or removing family members will require an IWDS Modification Request form.

Family Characteristics

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Family Type:Parent in one-parent family

Family Size:2

Dependant Less than 18:1

Family of 1 due to Disability:No

List Family

Cancel

List Family

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Family Size: 2

Dependant Under 18:1

Return

	First	Last	Relationship	Age	Dependent	Has Income
View	Giada	Fieri	Daughter	11 Years	Y	N
View	Bobbi	Fieri	Applicant	30 Years	N	Y

Return

Making Corrections to IWDS Clients

On the Income Calculation screen, the LSA cannot change any fields.

Any changes to this screen will require an IWDS Modification Request form.

Be aware that changes to the income fields on this screen could affect eligibility.

Income Calculation

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Monthly	1	2	3	4	5	6	Row Total
Wages	\$4333.00	\$4333.00	\$4333.00	\$12533.00	\$0.00	\$0.00	\$25532.00
Self-Employed Wages							\$0.00
Pension							\$0.00
Insurance Annuity							\$0.00
Alimony							\$0.00
Other							\$0.00
UI Benefits							\$0.00
Total	\$4333.00	\$4333.00	\$4333.00	\$12533.00	\$0.00	\$0.00	\$25532.00

Monthly: \$4255.33

Annual: \$51064.00

Calculate Totals

Cancel

Making Corrections to IWDS Clients

On the Dislocated Worker Characteristics screen, the LSA can only change the “Displaced Homemaker” field and the 4 DWG Disaster fields.

Changes to any other field on this screen will require an IWDS Modification Request form.

Dislocated Worker Characteristics
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Requires additional assistance: Yes
Unemployed at least six months prior to application: No
Completed one month of job search: Yes
Displaced Homemaker:
Spouse of Active Duty Service Member: No
a. Employment loss due to relocation:
b. Unemployed, underemployed and is experiencing difficulty in obtaining or upgrading employment:

Client has no work history: No
Was client unemployed or underemployed for 10 non-consecutive weeks out of the last 26 weeks: Yes
In the last twenty-four months, client held, or is currently holding, a temporary or seasonal job: No
In the last twenty-four months, has client employment ended more than once: No

The following question is for Employment Recovery Only:
Department of Defense Contractor employee in a non-managerial position at risk of termination due to defense reductions resulting in Contractor's conversion of operations from defense to non-defense applications:

* Required and Allowed for DWG Disaster Only:
Received Physical:
Received Tetanus Shot:
Received Background Check:
Received Drug Screening:

Making Corrections to IWDS Clients

On the WIOA Training Criteria screen, the LSA can change all of the fields.

WIOA Training Criteria
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

▶ WIOA Training Criteria

Assessment:

a. Assessment completed by:

Initial IEP:

a. Initial IEP completed by:

Meets Qualifications for Selected Training Program:

Selected Training Program is in Demand:

Other Grant Sources are Unavailable:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Eligibility Determination screen, the LSA can add new Title/Program eligibility and certify it.

Enter a “Eligibility Determination Date” that is on or after the “Application Date” and if there are any other Title/Programs that the client is eligible for, they will appear as choices.

Eligibility Determination

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1A - Adult Career Services	03/01/2021	03/01/2021
Documentation	Criteria	Yes	1A - Adult BSD Career Services	03/01/2021	03/01/2021

* Application Date: x

* Eligibility Determination Date:

Eligibility Determination

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1A - Adult BSD Career Services	03/01/2021	03/01/2021
Documentation	Criteria	Yes	1A - Adult BSD Training Services	03/01/2021	03/01/2021
Documentation	Criteria	Yes	1D - 1N - 1S - 1E - 1DC - 1EC - Dislocated Worker Career Services - Displaced Homemaker	04/01/2021	04/01/2021
Documentation	Criteria	Yes	1D - 1N - 1S - 1E - 1DC - 1EC - Dislocated Worker Training Services - Displaced Homemaker	04/01/2021	04/01/2021

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

If you click on the Certification Date for a particular Title/Program, the LSA has the ability to delete the previously completed Title/Program certification by clicking “Delete”.

However, the LSA should be very careful to make sure any related services are deleted before deleting a certification.

If you are removing both Career and Training certification in the same title, remove the Training certification first.

Eligibility Determination

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1A - Adult Career Services	03/01/2021	03/01/2021
Documentation	Criteria	Yes	1A - Adult BSD Career Services	03/01/2021	03/01/2021



Certification

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Title / Program(s): 1A - Adult Career Services

I have reviewed the eligibility criteria for this Title or Program, along with any required documents, and certify that the above named customer is eligible.

Date: 03/01/2021



Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

Eligibility Determination

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

If you click on the “Documentation” for a Title/Program certification, you will see the Eligibility Documentation screen.

		Certify	Title / Program	Eligibility Date	Certification Date
Documentation	Criteria	Yes	1A - Adult Career Services	03/01/2021	03/01/2021
Documentation	Criteria	Yes	1A - Adult BSD Career Services	03/01/2021	03/01/2021

Save Cancel

The LSA can change the selected documentation on an eligibility criteria if needed.

If you do this, it is strongly recommended to add a case note detailing the change.

Criteria	Conjunction
Documentation and Subcriteria	
(Authorized to Work in the U S	
Birth certificate (original or certified copy issued by a state, county, municipal authority or outlying possession of the United States) ▾	AND
Compliant With Selective Service	
Not Applicable ▾	AND
Age 18+ at Enrollment	
Birth certificate (original or certified copy issued by a state, county, municipal authority or outlying possession of the United States) ▾	AND
Received an Assessment	
By LWIA ▾	AND
Has an Individual Employment Plan	
By LWIA ▾	AND
Meets Qualifications of Selected Training Program	
Assessment Records ▾	AND
Selected Training Program in Demand	
Demand Occupation Training List ▾	AND
Other Grant Sources are Unavailable or Inadequate	
Training Budget Worksheet ▾	AND
(Non-Veteran Status	OR
Veteran Status with acceptable documentation) AND
(Basic Skills Deficient	
Results from an authorized assessment test ▾	OR
English Language Learner	OR
Basic Skills Deficient Screening Tool)

Save Cancel

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Contact Information screen, the LSA cannot change any fields.

Any changes to this screen will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Contact Information screen on the Customer Level.

Contact Information

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

First Name: Bobbi

Middle Initial:

Last Name: Fieri

Street Address: 500 E Monroe

Apt: 5C

City: Springfield

State: Illinois

Zip Code: 62701

County: Logan County

Home Phone:

Work Phone: **Ext:**

Cell Phone: (217)557-5559

Email Address: BF@dceo.org

Cancel

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Additional Contacts screen, the LSA can add new contacts and change any fields on an existing contact.

To remove a contact will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Additional Contacts screen on the Customer Level.

Additional Contacts

[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

	Name	Relationship	Work Phone	Home Phone
<input type="button" value="View"/>	Flay, Guy	friend		(217)557-5558

Maintain Contact

[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

*First Name:

Middle Initial:

*Last Name:

Relationship:

Street Address: Apt:

City:

State:

*Phone Number: Zip Code:

Work Phone Number: Ext:

Email Address:

Comment:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Private Information screen, the LSA can change the “Race/Ethnicity”, “Individual with a Disability”, “Category of Disability”, and all of the New WIOA Fields.

Any changes to the other fields on this screen will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Private Information screen on the Customer Level.

Private Information
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Social Security Number: 366-22-0231
Hispanic or Latino? No
Race/Ethnicity: American Indian or Alaskan Native Asian
 Black Hawaiian or Pacific Island
 Prefer Not To Answer White

Gender: Female
Birth Date: 05/05/1990
Mother's Maiden Name: Drummond
Authorized to Work In USA: Yes
Selective Service Compliance: Not Applicable [Verify Compliance](#)
Selective Service Number:
Individual with a Disability? **Yes**
 Physical/Chronic Health Condition
 Physical/Mobility Impairment
 Mental or Psychiatric Disability

Category of Disability: Vision-related disability
 Hearing related disability
 Learning Disability
 Cognitive/Intellectual disability

▶ New WIOA Fields
Received services funded by the State Developmental Disabilities Agency (SDDA):
Received services funded by a local or state mental health agency (LSMHA):
Received services funded via a state Medicaid HCBS waiver:
Does the participant have a Section 504 plan: No
Does the participant have an Individualized Education Program/Special Education Service:
Type of Disability Work Setting:
Type of Customized Employment Services (CES) Received:
Type of Financial Services Received:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Veterans Information screen, the LSA cannot change any fields.

Any changes to the fields on this screen will require an IWDS Modification Request form.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the Veterans Information screen on the Customer Level.

Veterans Information
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

Veteran or Qualified Spouse of a Veteran or Transitioning Service Member? No

An individual shall be considered a **U.S. Armed Forces Veteran** if they have served in the active military, naval, or air service, serving at least one day and were discharged or released from such service under conditions other than dishonorable. Active service includes full-time duty in the National Guard or a Reserve component, other than full-time duty for training purposes.

You are a **Qualified Spouse**, if you are the spouse of a veteran who has a 100% service-connected disability, who died from a service-connected disability or has been missing in action, has been captured or has been detained by a foreign power for more than 90 days.

You are a **Transitioning Service Member**, if you are an individual who is on active U. S. military status (including separation leave) and is within 24 months of retirement or 12 months of separation from military service.

Answer question below determined by the veterans or qualified spouse eligibility documentation.

Branch:	to
Dates of Service:	
Nature of Military Discharge:	
Armed Forces Campaign or Expeditionary Medal?	Expeditionary Medal
Service connected disability?	A Disabled Veteran has a service connected disability of 29% or less A Special Disabled Veteran has a service connected disability of 30% or greater
U.S. Citizen?	
▶ WIOA Fields for Veteran, Qualified Spouse or Transitioning Service Member	
Did the customer receive priority of service?	Veterans, Qualified Spouses and Transitioning Service Members are entitled to priority of service. Under the Jobs for Veterans Act, a "covered person" is entitled to priority of service under 20 DOL-funded workforce programs, including WIOA Title I Adult, Youth, and Dislocated Worker programs, statewide activity programs, National Emergency Grants (NEG), and the Trade Adjustment Assistance (TAA) program.
Did the customer attend a Transitional Assistance Program (TAP) in the last 3 years?	
Has acceptable documentation been used and retained when Veteran, Qualified Spouse of a Veteran or Transitioning Service Member status is claimed?	Acceptable Documentation
▶ New WIOA Fields	
Most Recent Date received services from DVOP Specialist: Referred to Department of Veterans Affairs (VA) Services?	
Date Referred to Department of Veterans Affairs (VA) Vocational Rehabilitation/Employment Program:	
Referred to Jobs for Veterans State Grants (JVSG) Services?	
<input type="button" value="Cancel"/>	

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Veterans Information screen, there is one field that career planners may not understand.

Veteran's priority of service means that a veteran client is to go to the top of the list for service. They should not have to wait "in line".

The questions "Did the customer receive priority of service?" should only be answered "NO" if the client was **DENIED** priority of service. Meaning the career planner deliberately chose to wait on another client and made the veteran wait for service.

If there was no one "in line" ahead of the veteran, then the client still received priority.

Did the customer receive priority of service?

Veterans, Qualified Spouses and Transitioning Service Members are entitled to priority of service. Under the Jobs for Veterans Act, a "covered person" is entitled to priority of service under 20 DOL-funded workforce programs, including WIOA Title I Adult, Youth, and Dislocated Worker programs, statewide activity programs, National Emergency Grants (NEG), and the Trade Adjustment Assistance (TAA) program.

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the List Work History screen, neither the career planner nor the LSA can add any new records after certification. If you need to add a job where the client was employed on or prior to the application date, you will need to turn in an IWDS Modification Request form.

Any new job the client started after the application date may be entered on the Customer Level by the career planner.

However, the LSA can click on any existing employer record to make changes on that record.

List Work History

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

[Return](#)

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Employer Name	Employment Dates	Dislocation Job?	DETS ID
Mel-O-Cream Donuts International, Inc.	12/01/2015 - 01/31/2021	Y	20210121002

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Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On the Edit Job screen, the LSA can change all of the fields.

To completely remove an employer, the LSA can click the DELETE button.

However, the LSA should verify that any changes to this screen were accurate on the application date.

Any changes that occurred after the application date should be made to the List Work History screen on the Customer Level. The exception would be for any jobs associated with the DW Eligibility. Those changes will not transfer over since the job at the application level that had eligibility criteria is locked

Edit Job
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

DETS ID: 20210121002

TAA Petition: - [Verify TAA Petition Number](#)

*Employer Name: Mel-O-Cream Donuts International, Inc

*Employment Status: Laid Off

*Start Date: 12/01/2015 End Date: 01/31/2021

Job Title: Production Operation Manag

Street Address: 5456 International Pkwy

City: Springfield

State: Illinois Zip Code: 62711

Contact Name: Montgomery Burns

Contact Phone: (217)557-5557 Extension:

Wages: \$52000.00 Per: Year

*Hours Per Week: 40.0

Job Duties:

* Primary Occupation: Yes Dislocation: Yes

Self Employed: No Family Member/Farmhand: No

Layoff Reason: Lack of Work at Employer

Received Severance Pay: Yes

Date Notified of Layoff: 01/02/2021

Received Rapid Response Services: Yes

Last Date Received Rapid Response Services: 02/28/2021

Nafta Petition: - [Verify NAFTA Petition Number](#)

TAA Return to Work: No

ATAA/RTAA Employment?: No

*NAICS Code: 311991

Description: Perishable Prepared Food Manufacturing

Declining: Y

*O*Net(SOC): 351012

Description: FirstLine Supervisors of Food Preparation and Serving Workers

Low Growth?: Y

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

The exception is that any job associated with the WIOA Dislocated Worker eligibility criteria cannot be updated by the LSA at the application level.

This will require a Request for IWDS Modification form submission to make any changes.

List Work History

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

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Employer Name	Employment Dates	Dislocation Job?	DETS ID
Mel-O-Cream Donuts International, Inc.	12/01/2015 - 01/31/2021	Y	20210121002

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Making Corrections to IWDS Clients

Some services will allow the LSA to make changes. On the Services screen, the LSA will need to click on the individual service record to see if they can make changes.

In this case, the LSA will click on the Development of the IEP service.

Services
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
03/01/2021	03/01/2021	Development of an IEP - 1A	Successful Completion	Chris Daniels - career planner

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Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

On this service, the LSA can change the “Grant”, “Provider”, “Weekly Hours”, and “Comments” fields.

Any changes to the other fields on this screen will require an IWDS Modification Request form.

The LSA also has the option to delete this service with the “Delete Service” button.

Different services will have different fields open and closed.

Edit Required Activity Information

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Created By: Chris Daniels - career planner
Date Created: 03/12/2021
Last Updated By: Chris Daniels - career planner
Last Updated: 03/12/2021
Title: 1A
Service Level: Career Services
Activity: Development of an IEP **Same Day Service**
***Grant:**
Provider: *[gingers-00 Gingers Community College](#)
Start Date: 03/01/2021
End Date: 03/01/2021
Current Status: Successful Completion
***Weekly Hours:**
Comments:

Additional Info

Add Additional Episode

Save

Cancel

Delete Service

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

If the start date of a service is wrong, that service will need to be deleted and re-entered with the correct start date.

Even the IWDS System Administrators cannot change the start date on a service.

Edit Required Activity Information

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Created By: Chris Daniels - career planner
Date Created: 03/12/2021
Last Updated By: Chris Daniels - career planner
Last Updated: 03/12/2021
Title: 1A
Service Level: Career Services
Activity: Development of an IEP **Same Day Service**
***Grant:** 19681015-United Workforce Development Board aka Career Link
Provider: *gingers-00 Gingers Community College
Start Date: 03/01/2021
End Date: 03/01/2021
Current Status: Successful Completion
***Weekly Hours:**
Comments:

Additional Info

Add Additional Episode

Save

Cancel

Delete Service

Making Corrections to IWDS Clients

Some services may not allow the LSA to delete them if other services are present on the client that require that pre-requisite service.

In that case, contact the IWDS System administrators with the screen shot of the error message.

Edit Required Activity Information

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021

Created By: Chris Daniels - career planner
Date Created: 03/12/2021
Last Updated By: Chris Daniels - career planner
Last Updated: 03/12/2021
Title: 1A
Service Level: Career Services
Activity: Development of an IEP **Same Day Service**
***Grant:** 19681015-United Workforce Development Board aka Career Link ▾
Provider: *gingers-00 Gingers Community College
Start Date: 03/01/2021
End Date: 03/01/2021
Current Status: Successful Completion
***Weekly Hours:** 1.0
Comments:

Additional Info

Add Additional Episode

Save

Cancel

Delete Service

Making Corrections to IWDS Clients

On the List Case Notes screen, the LSA will need to click on the individual case note they want to update.

The LSA cannot delete case notes. Any case notes that need deleted will require an IWDS Modification Request form.

List Case Notes
[Bobbi Fieri](#)
SSN: 0231

1 found Page 1 of 1

	Contact Date	Note Category	Program	Note Subject	Updated By	Created
View	03/01/2021	Case Note Supporting Same Day Service	WIOA	IEP	Chris Daniels - career planner	2021-03-12 17:18:32.456

Page 1 of 1

Making Corrections to IWDS Clients

On the Maintain Case Notes screen, the LSA can edit the “Program”, “Note Category”, “Confidential”, “Note Subject”, and “Case Note” fields.

The LSA cannot change the “Staff Name” or “Contact Date”. If those fields need changed, the LSA will need to have the record deleted and then have the career planner re-enter the case note.

Maintain Case Note
Bobbi Fieri
Staff Name: [Chris Daniels - career planner](#)

Contact Date: 03/01/2021
Program:
WIOA

*Note Category:

*Confidential:

*Note Subject:

*Case Note:

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

Anything involving an application in “exiter” status needs to be sent to the WIOA Performance Measures Staff and cc: the IWDS System Administrators. Sometimes corrections may affect past quarters that have already been reported.

The WIOA Performance Measures Staff also handles exiting clients that are over the date limit as well as removing exits from clients.

Exit Control Panel
[Bobbi Fien](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021

[Return](#)

GENERAL		Exit Date: NOT EXITED	Update
Title ID	Registration Date 04/01/2021	Exit Reason	
CREDENTIALS			Update
Type Occupational Skills Certificate or Credential	Institution Levi Ray & Shoup	Date 10/31/2023	
EMPLOYMENT AT EXIT			Update
Employer Name: Levi Ray Shoup Inc Employment Start: 11/01/2023 Employment End: null Contact Name: Kris Theilen Contact Phone: (217)299-2161 Green Job: No - Computer Programmers Job Title: Programmer Job Duties:			
Q1 POST EXIT		UI Wages: No Supplemental Q1 Information Specified	
Q2 POST EXIT		UI Wages: No Supplemental Q2 Information Specified	
Q3 POST EXIT		UI Wages: No Supplemental Q3 Information Specified	
Q4 POST EXIT		UI Wages: No Supplemental Q4 Information Specified	
WAGE DATA			View
Pre-Enrollment		Current/Exit	
Jan - Mar 2021	Not Available	Oct - Dec 2023	Not Available
Oct - Dec 2020	Not Available	Jul - Sep 2023	Not Available
Jul - Sep 2020	Not Available	Apr - Jun 2023	Not Available
Apr - Jun 2020	Not Available	Jan - Mar 2023	Not Available
		Oct - Dec 2022	Not Available
		Jul - Sep 2022	Not Available

[Return](#)

Local System Administrator Training - Editing IWDS Client Screens



Making Corrections to IWDS Clients

Anything involving an application in “exiter” status needs to be sent to the WIOA Performance Measures Staff and cc: the IWDS System Administrators. Sometimes corrections may affect past quarters that have already been reported.

The WIOA Performance Measures Staff also handles exiting clients that are over the date limit as well as removing exits from clients.

Exit Control Panel
[Bobbi Fieri](#) [Application Summary](#)
SSN: 0231 App LWA:15 App Date:03/01/2021 Exit Date:10/31/2023
[Return](#)

GENERAL Update		
Exit Date: 10/31/2023 School Status At Exit: Not attending school; H.S. graduate		
Title ID	Registration Date 04/01/2021	Exit Reason Attained Credential/Diploma/Certificate
CREDENTIALS Update		
Type Occupational Skills Certificate or Credential	Institution Levi Ray & Shoup	Date 10/31/2023
EMPLOYMENT AT EXIT Update		
Employer Name: Levi Ray Shoup Inc Employment Start: 11/01/2023 Employment End: null Contact Name: Kris Theilen Contact Phone: (217)299-2161 Green Job: No - Computer Programmers Job Title: Programmer Job Duties:		
Q1 POST EXIT Jan - Mar 2024 UI Wages: Not Available No Supplemental Q1 Information Specified		
Q2 POST EXIT Apr - Jun 2024 UI Wages: Not Available No Supplemental Q2 Information Specified		
Q3 POST EXIT Jul - Sep 2024 UI Wages: Not Available No Supplemental Q3 Information Specified		
Q4 POST EXIT Oct - Dec 2024 UI Wages: Not Available No Supplemental Q4 Information Specified		
WAGE DATA View		
Pre-Enrollment	Current/Exit	
Jan - Mar 2021 Not Available	Jan - Mar 2025 Not Available	
Oct - Dec 2020 Not Available	Oct - Dec 2024 Not Available	
Jul - Sep 2020 Not Available	Jul - Sep 2024 Not Available	
Apr - Jun 2020 Not Available	Apr - Jun 2024 Not Available	
	Jan - Mar 2024 Not Available	
	Oct - Dec 2023 Not Available	

[Return](#)

Making Corrections to IWDS Clients

The LSA cannot do anything on the General Exit screen after the client has been exited.

They will have to submit an email to the WIOA Performance Measures Staff and cc: the IWDS System Administrators. This can also be submitted with a Request for IWDS Modification form submission to make any changes.

General Exit

[Bobbi Fieri](#) [Application Summary](#)

SSN: 0231 App LWA:15 App Date:03/01/2021 Exit Date:10/31/2023

Exit Date: 10/31/2023

Comment:

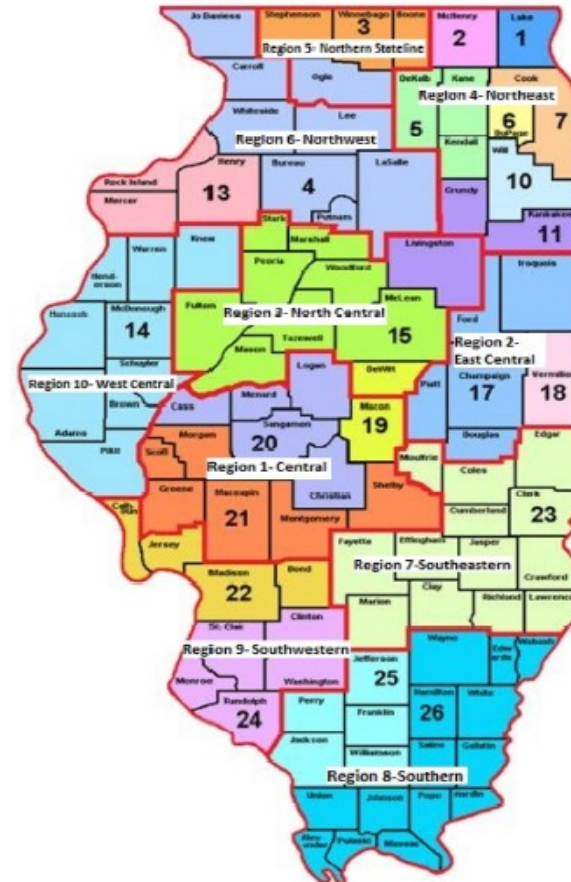
School Status At Exit: Not attending school; H.S. graduate

Title	Registration Date	LWA	Reason
1D	04/01/2021	15	Attained Credential/Diploma/Certificate

Cancel

Submitting IWDS Modifications to Monitors

When submitting IWDS modifications to the OET Monitoring staff, the LWIAs are separated into 1 of 3 regions.



Submitting IWDS Modifications to Monitors

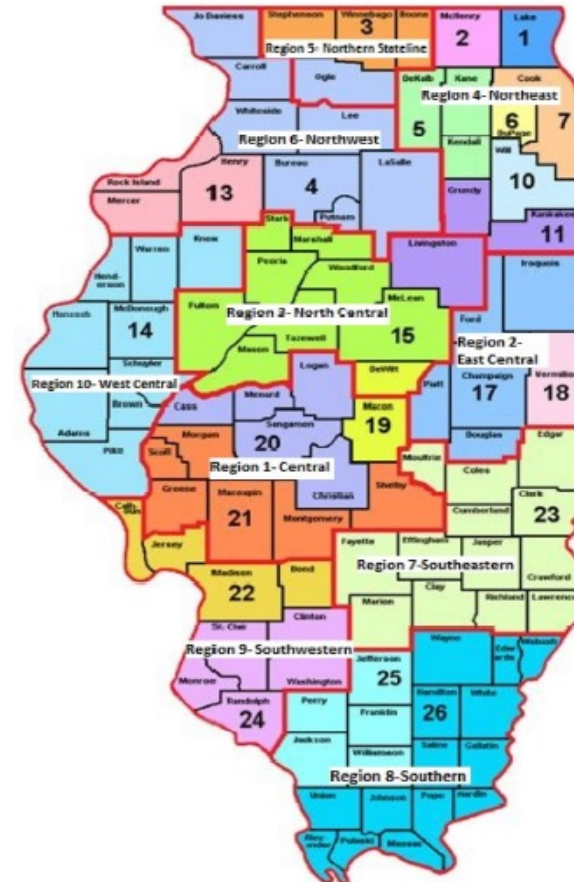
- **Northern Region:** LWIA's 1, 2, 3, 5, 6, 7, 10, 11, 27 (National Able)
- **Central Region:** LWIA's 4, 13, 14, 15, 17, 18, 19, 20, 21
- **Southern Region:** LWIA's 22, 23, 24, 25, 26



Submitting IWDS Modifications to Monitors

The OET contacts for each region are:

- **Northern Region:** Matt Hillen
- **Central Region:** Bryan Tippy
- **Southern Region:** Robin Kralman



(The contact information is listed at the end of the slideshow)

Local System Administrator Training - Editing IWDS Client Screens



Submitting IWDS Modifications to Monitors

This is the current version of the IWDS Modification form. The LWIA can request a copy of this form from the OET Monitoring staff.

The Local System Administrator should fill this out and email the form and supporting documentation and/or screen shots for the modification to their assigned OET Monitoring staff member.

The OET Monitoring staff will review the request, and if approved, forward it to the IWDS Support staff to complete the modification.

WIOA/TAA REQUEST FOR MODIFICATION TO IWDS

REQUEST IDENTIFICATION:

LWIA Date of Request Compliance Monitor
Customer: Last Name First Name SSN (Last 4)
Application Data: Application Date Title(s) Case Manager

REQUEST DESCRIPTION & RATIONAL

SUPPORTING DOCUMENTATION (check all that apply and attach documentation):

Case note screen print Service activity screen print Grant information screen print
 Exit screen print Education status screen print TAA service or status screens
 Other Performance impact screen print

(To be completed by DCEO)

DCEO APPROVAL:

Program	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Staff: _____	
Reporting	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Staff: _____	
Performance	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____
Fiscal	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____
Trade	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____

FINAL RESOLUTION:

APPROVED DENIED Date: _____

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Submitting IWDS Modifications to Monitors

If possible, when submitting a Request for Modification please include a screen shot of the error as well as a copy of any supporting documentation for the change.

In general, any time you are emailing the IWDS System Administrators, the Performance Measures staff, or the Monitoring staff about an IWDS client it is best to include screen shots of the error/issue.

WIOA/TAA REQUEST FOR MODIFICATION TO IWDS

REQUEST IDENTIFICATION:

LWIA Date of Request Compliance Monitor
Customer: Last Name First Name SSN (Last 4)
Application Data: Application Date Title(s) Case Manager

REQUEST DESCRIPTION & RATIONAL

SUPPORTING DOCUMENTATION (check all that apply and attach documentation):

Case note screen print Service activity screen print Grant information screen print
 Exit screen print Education status screen print TAA service or status screens
 Other Performance impact screen print

(To be completed by DCEO)

DCEO APPROVAL:

Program	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Staff: _____	
Reporting	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Staff: _____	
Performance	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____
Fiscal	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____
Trade	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> NA	Staff: _____

FINAL RESOLUTION:

APPROVED DENIED Date: _____

Transferring Clients Between LWIAs

Sometimes, clients will have a reason to switch LWIAs. It could be a physical move or another valid reason.

To begin the process of transferring the client from one LWIA to another, the giving and receiving LWIA's need to agree to make the transfer. It needs to be understood that the gaining LWIA is accepting the client for Performance Outcomes and for any future monitoring or data validation that might occur with the client.

The receiving LWIA does not have to accept the transfer if they don't want to be responsible for the client, such as if the client would be a negative affect on their performance outcomes.

Transferring Clients Between LWIAs

Once all parties have agreed to the client transfer, the Local System Administrator for the LWIA (either the giving or receiving) sends an email to both of the IWDS System Administrators, with the Local System Administrator from the other LWIA cc'd on the email.

The email will detail the customer's name, last 4 SSN, the Illinois WorkNet Center location, and the name of the case manager who will be taking over the client in the receiving LWIA.

The receiving LWIA's Local System Administrator must either state in the original email or send a reply to this email that their LWIA is accepting the transfer.

Once all of this has occurred, the IWDS System Administrators will submit the transfer to the programming staff, and they will notify the LWIAs when the transfer is completed.

Transferring Clients Between LWIAs

Finally, the receiving LWIA must receive the original hard copy files with all the supporting documentation. **Not copies.** The original documents should follow the client to the new LWIA.

Sometimes the giving LWIA will choose to keep a copy of everything for their records, since they expended grant money on the client.

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OET Contacts

IWDS SYSTEM ADMINISTRATORS

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CENTRAL REGION – Bryan Tippy: (217) 685-0587, Bryan.Tippy@illinois.gov

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QUESTIONS?

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