

# POTENTIAL SUSPENSION REQUEST INSTRUCTIONS BENCHMARKS NOT MET – NO COMPLETION TRA

Complete the **Trade Potential Suspension Letter Commerce/Trade Form #003c (Potential Suspension Letter)** marking the box for **Participant has failed to meet required Training Benchmarks and Completion TRA is in jeopardy**. Mark the appropriate box for modification of the training plan, as applicable.

Send the **Potential Suspension Letter** to the participant.

The start date of the letter must match the start date of entry of the **Potential Suspension Request Status Record**

Trade Potential Suspension Letter

Date:  /  /

Participant Name:

Mailing Address:

City, State, Zip:

**It has been determined you have not met all eligibility requirements to qualify for and maintain benefits in the Trade/TRA Program. Contact was previously made to inform you of this determination and request additional information or documentation. All documentation and information provided has been reviewed, however it does not support your continued participation and receipt of benefits.**

This letter serves as notification that the Illinois Department of Employment Security will investigate your eligibility for benefits from the Trade/TRA Program due to the following reason:

- Participant was provided a waiver from training and refused suitable employment.
- Participant enrolled in training but failed to start.
- Participant failed to maintain full-time or part-time (as appropriate) status in a training program. Participant failed to attend all scheduled training classes and other training activities scheduled by the training institution in any week of the training program.
- Participant did not meet one of the qualifying requirements for eligibility in a Trade/TRA Program.
- Participant is non-compliant with Trade training requirements (including alleged fraud).
- Participant has failed to meet required Training Benchmarks and Completion TRA is in jeopardy.
  - Training Plan will be modified.  Training Plan cannot be modified.

**APPEAL RIGHTS**  
*If you disagree with this determination, you may complete and submit a request for reconsideration/appeal. A letter will suffice if you do not have an agency form. Your request must be filed with the Illinois Department of Employment Security ("IDES") within thirty (30) calendar days after the date at the top of this letter. If the last day for filing your request is a day that IDES is closed, the request may be filed on the next day that IDES is open. Please file the request by mail to: IDES P.O. Box 19509 Springfield, IL 62794 or fax to: 217-557-4913. Any request submitted by mail must bear a postmark date within the applicable time limit for filing.*

If you have any questions, please call me at (  )  -  Ext.   
*(Telephone Number)*

\_\_\_\_\_  
Printed Name of Career Planner

\_\_\_\_\_  
Signature of Career Planner

\_\_\_\_\_  
Date

Enter a **Potential Suspension Request Status Record** in IWDS.  
Click **List TAA Status** on the **Application Menu** on the **TAA Application** for the participant.

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

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

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- [TAA Additional Info](#)
- [Concurrent Programs](#)
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- [Education Status](#)
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- [List Part Time/Distance Learning](#)

**Exit**

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Click Add TAA Status.



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

### List TAA Status

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

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

Select **Potential Suspension Request** for the **Status**.

Enter the **Status Start Date**. The start date is the date of entry (this should also match the date of the **Potential Suspension Letter**).

Select **Benchmarks Not Met, No Completion TRA** as the **Suspension Request Reason**.

Enter a dated comment in the **Comment Box** explaining the reason for the **Potential Suspension Request**.

**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:** Potential Suspension Request

**Status Start Date:**

**Status End Date:**

**Waiver Reason:**

**Suspension Request Reason:**

**Reason:**

**Comments:**

**IEP Amount Approved:**

**Revocation Reason:**

**TAA Return to work Part Time:**

**Qualifies Under 45 Day Extension:**

**Qualifies Under 60 Day Extension:**

**Qualifies Under Federal Good Cause Provision:**

**Qualifies Under Equitable Tolling:**

Here is the screen after a completed entry of a **Potential Suspension Request**.

IWDS
Illinois Workforce  
Development System
Case Management

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### Maintain TAA Status

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

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**TAA Petition Number:** 90900   **TAA Act:** 2015  
**Employer Name:** Caterpillar

---

**Status:** Potential Suspension Request  
**Entry Date:** 12/15/2021  
**Status Start Date:** 12/15/2021  
**Status End Date:**

**Suspension Request Reason:** Benchmarks Not Met, No Completion TRA

**Comments:**

Participant failed to meet two benchmarks.  
Training Plan cannot be modified.

**Created By:** Sheila Sloan   **Date Created:** 12/15/2021  
**Last Updated By:** Sheila Sloan   **Date Last Updated:** 12/15/2021

Approval Type	Approver	Approved/Denied Date	Approval Status
Original			Pending Approval

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

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

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

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu on the left 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 shows 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 on Trade Case Management – TAA.

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

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

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	10/25/2020	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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Click **Add Additional Episode**.

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### Edit Required Activity Information

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

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

**Created By:** Sheila Sloan  
**Date Created:** 10/29/2020  
**Last Updated By:** Sheila Sloan  
**Last Updated:** 10/29/2021  
**Approved/Denied By:**  
**Approved/Denied Date:**  
**Title:** TAA  
**Service Level:** Employment and Case Management  
**Activity:** Trade Case Management **Same Day Service**  
**\*Grant:** 17661015-United Workforce Development Board aka Career Link  
**Provider:** \*1502-00 Carl Sandburg College  
**Start Date:** 10/25/2020  
**End Date:** 10/25/2020  
**Current Status:** Successful Completion  
**\*Weekly Hours:** 10.0  
**\* Bridge Program Activity?:** No  
**Comments:**  
**TAA Services Completed:**  *Click Confirm when all TAA Services have been completed*



Complete the following fields:

**Contact Date** – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

**Program** – Select **TAA/NAFTA** from the drop down list.

**Note Category** – Select the appropriate entry from the drop down list.

**Confidential** – Select **Yes** or **No** to indicate if the case note is confidential.

**Note Subject** – Enter a subject for the case note that describes what service is being provided.

**Case Note** – Enter a detailed case note detailing the circumstance of the **Potential Suspension Request** and the date the **Potential Suspension Letter** was sent 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), 'FAQs', and 'I'm Done: Log Off'. The main content area features a yellow 'Informational Message' box stating that a Case Note must be completed when an Additional Episode is added to 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 status (No), Note Subject (Case Management Services), and a large text area for the Case Note (Provided Case Management Service to participant.). A 'Save and Return' button is located at the bottom of the form.

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.

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, the user's name "Steve Perry" and "Application Summary" are displayed, along with "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". There are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

A table titled "Services" shows 3 found results on Page 1 of 1. The table has columns for Start Date, End Date, Service Provided, Status, and Created By. The first row shows a "Trade Case Management - TAA" service with a start date of 10/25/2020 and an end date of 11/01/2021 (highlighted in red), with a status of "Successful Completion" and created by "Sheila Sloan". The second row shows an "Individual Employment Plan - TAA" service with a start date of 02/13/2019 and a status of "Open", also created by "Sheila Sloan". The third row shows an "Issued Waiver - TAA" service with a start date of 02/13/2019 and an end date of 04/14/2019, with a status of "Successful Completion" and created by "Sheila Sloan".

Below the table, there are three buttons: "Add Enrolled Service", "Printable Services", and "Return".

WIOA Application: No entry.

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

Trade Application: No entry.

### WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).

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

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this is a blue sidebar menu with options like "Staff Menu", "Customer Menu", "Application Menu", "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. Below the user info are three columns of links: "Application" (including 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, and Eligibility Determination), "Profile" (including Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, and List All Documents), and "Services" (including List Enrolled Services, ITA Characteristics, and List Part Time/Distance Learning). The "Services" column is highlighted with a red box. At the bottom right, there is an "Exit" section with links for Exit Summary, View Wages, and Performance Impact.

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



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### Services

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

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

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

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Click **Add Additional Episode**.



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### Edit Required Activity Information

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

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

Created By: Sheila Sloan  
 Date Created: 11/01/2021  
 Last Updated By: Sheila Sloan  
 Last Updated: 11/01/2021  
 Title: IDC  
 Service Level: Career Services  
 Activity: Career Planning (Case Management) **Same Day Service**  
 \*Grant: 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

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 circumstance of the **Potential Suspension Request** and the date the **Potential Suspension** Letter was sent to the participant.

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. At the top, a red header 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 an Additional Episode to a Same Day Service. Below this is the 'Add Case Note' form for staff member Steve Perry. The form includes fields for Staff Name (Sheila Sloan), Contact Date (11/01/2021), Program (WIOA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management), and Case Note (11/1/21 Case Management for participant). A 'Save and Return' button is located at the bottom of the form.

If Illinois is the agent state, the career planner must communicate the **Potential Suspension Request** status for the participant to the Liable State.

### IDES Notification of Adjudication

Following the career planner's IWDS entries, the Potential TRA Training/Waiver file Maintenance Report is transmitted to IDES overnight.

### Career planner's Follow-Up to IDES Adjudication of the Potential Suspension Request

The career planner will review the IBIS Claimant Issue List Screen for the outcome. Ongoing case management must be provided to determine next steps and process an **IEP** modification, if applicable.

**If IDES affirms (participant did not meet benchmarks and is not eligible for Completion TRA), the career planner will do the following:**

Update the **Potential Suspension Status Record** with a dated comment in the **Comment Box** detailing the outcome of the IDES adjudication and enter a **Status End Date** (date of IDES determination).

Click **List TAA Status** 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

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- Public Assistance
- Family Characteristics
- Income Calculation
- Dislocated Worker Characteristics
- LWA Specific Data
- Eligibility Determination
- List TAA Status**
- List IDES View

**Profile**

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- Private Information
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- Employment History
- Credentials
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- 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 **View** for the **Potential Suspension Request Status Record**.

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Illinois Workforce Development System
Case Management

### List TAA Status

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

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Enter the **Status End Date** (date of IDES outcome).  
 Enter a dated comment in the **Comment Box** describing the IDES outcome.  
 Click **Save**.

IWDS
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Case Management

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### Maintain TAA Status

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

**TAA Petition Number:** 90900   **TAA Act:** 2015  
**Employer Name:** Caterpillar

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**Status:** Potential Suspension Request  
**Entry Date:** 12/15/2021  
**Status Start Date:** 12/15/2021  
**Status End Date:** 12/30/2021

**Suspension Request Reason:** Benchmarks Not Met - No Completion TRA

**Comments:** 12/30/2021 - Comment describing outcome from IDES.  
Participant failed to meet two benchmarks.

**Created By:** Sheila Sloan   **Date Created:** 12/15/2021  
**Last Updated By:** Sheila Sloan   **Date Last Updated:** 12/15/2021

Approval Type	Approver	Approved/Denied Date	Approval Status
Original			Pending Approval

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

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 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.

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

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- Dislocated Worker Characteristics
- LWA Specific Data
- Eligibility Determination
- List TAA Status
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- Contact Information
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- 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**

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

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	10/25/2020	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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Click **Add Additional Episode**.

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### Edit Required Activity Information

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

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

**Created By:** Sheila Sloan  
**Date Created:** 10/29/2020  
**Last Updated By:** Sheila Sloan  
**Last Updated:** 10/29/2021  
**Approved/Denied By:**  
**Approved/Denied Date:**  
**Title:** TAA  
**Service Level:** Employment and Case Management  
**Activity:** Trade Case Management **Same Day Service**  
**\*Grant:** 17661015-United Workforce Development Board aka Career Link  
**Provider:** \*1502-00 Carl Sandburg College  
**Start Date:** 10/25/2020  
**End Date:** 10/25/2020  
**Current Status:** Successful Completion  
**\*Weekly Hours:** 10.0  
**\* Bridge Program Activity?:** No  
**Comments:**  
**TAA Services Completed:**  *Click Confirm when all TAA Services have been completed*

Complete the following fields:

**Contact Date** – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

**Program** – Select **TAA/NAFTA** from the drop down list.

**Note Category** – Select the appropriate entry from the drop down list.

**Confidential** – Select **Yes** or **No** to indicate if the case note is confidential.

**Note Subject** – Enter a subject for the case note that describes what service is being provided.

**Case Note** – Enter a detailed case note detailing the outcome of the IDES adjudication and any other actions taken as a result of the outcome.

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. On the left is a blue navigation menu with links for Staff Menu, Customer Menu, Application Menu, Case Notes, Universal Services, and FAQs. The main content area features a yellow informational message about Case Note completion. Below this is the 'Add Case Note' form, 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 status (No), Note Subject (Case Management Services), and a text area for the Case Note (Provided Case Management Service to participant.). A 'Save and Return' button is located at the bottom of the form.

**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:

Program:

\*Note Category:

\*Confidential:

\*Note Subject:

\*Case Note:

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.

**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

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Start Date	End Date	Service Provided	Status	Created By
10/25/2020	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

Page 1 of 1

Add Enrolled Service Printable Services Return

WIOA Application: No entry.

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

Trade Application: No entry.

**WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).**

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

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this 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 the user info are three columns of links: "Application" (Guided Application, Application Definition, Assessment Summary, Concurrent Programs, Characteristics and Barriers, Employment, Characteristics, Education Status, Tests, Public Assistance, Family Characteristics, Income Calculation, Dislocated Worker Characteristics, LWA Specific Data, WIOA Training Criteria, Eligibility Determination), "Profile" (Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents), and "Services" (List Enrolled Services, ITA Characteristics, List Part Time/Distance Learning). The "Services" section is highlighted with a red box. At the bottom right, there is an "Exit" section with links for Exit Summary, View Wages, and Performance Impact.

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



**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

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	<b>Career Planning (Case Management) - IDC</b>	Successful Completion	<a href="#">Sheila Sloan</a>

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: 11/01/2021  
 Last Updated By: Sheila Sloan  
 Last Updated: 11/01/2021  
 Title: IDC  
 Service Level: Career Services  
 Activity: Career Planning (Case Management) **Same Day Service**  
 \*Grant:   
 Provider: \*[1537-00 Bradley University](#)  
 Start Date: 11/01/2021  
 End Date: 11/01/2021  
 Current Status: Successful Completion  
 Comments:



Complete the following fields:

**Contact Date** – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

**Program** – Select **WIOA** from the drop down list.

**Note Category** – Select the appropriate entry from the drop down list.

**Confidential** – Select **Yes** or **No** to indicate if the case note is confidential.

**Note Subject** – Enter a subject for the case note that describes what service is being provided.

**Case Note** – Enter a detailed case note detailing the outcome of the IDES adjudication and other actions taken as a result of the outcome.

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 an Additional Episode is added to 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 (WIOA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management), and Case Note (11/1/21 Case Management for participant). A 'Save and Return' button is located at the bottom of the form.

If the participant can demonstrate he/she has the financial means to support himself/herself to complete the training, the training can continue.

If the participant cannot demonstrate he/she has the financial means to support himself/herself to complete the training, the training must end upon the IDES determination.

The career planner will do the following:

Complete the **IEP Modification Form** marking all appropriate boxes for the modification.

TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM			
<b>Modification Information</b>			
1. Participant Name: <input style="width: 80%;" type="text"/>	2. Modification #: <input style="width: 80%;" type="text"/>		
3. Date of Modification Request: <input style="width: 80%;" type="text"/>	4. Date Modification to Take Effect: <input style="width: 80%;" type="text"/>		
<b>5. Reason for Modification:</b> (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 style="width: 100%;" 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 style="width: 100%;" type="text"/>		<input type="checkbox"/> End Service List Service(s): <input style="width: 100%;" type="text"/>	
<input type="checkbox"/> Change to Training End Date Reason: <input style="width: 100%;" type="text"/> Current End Date: <input style="width: 80%;" type="text"/> New End Date: <input style="width: 80%;" type="text"/>		<input type="checkbox"/> Switch to a New Training Program Reason: <input style="width: 100%;" type="text"/> Current Training Institution: <input style="width: 100%;" type="text"/> Current Training Program: <input style="width: 100%;" type="text"/> New Training Institution: <input style="width: 100%;" type="text"/> New Training Program: <input style="width: 100%;" type="text"/>	
<input type="checkbox"/> Changes in Cost Reason: <input style="width: 100%;" type="text"/>		<input type="checkbox"/> Change in Full-Time/Part-Time Status Reason: <input style="width: 100%;" type="text"/>	
<input type="checkbox"/> Potential Suspension Request    Start Date: <input style="width: 80%;" type="text"/>		<input type="checkbox"/> Switch in On-Site/Online Status	
<input type="checkbox"/> Vacation Break    Start Date: <input style="width: 80%;" type="text"/> End Date: <input style="width: 80%;" type="text"/>		<input type="checkbox"/> Switch in Transportation/Subsistence	
<input type="checkbox"/> Final Cost Reconciliation	<input type="checkbox"/> Close IEP	<input type="checkbox"/> Other <input style="width: 100%;" type="text"/>	
<b>6. How does the modification affect the total IEP cost?</b>			
Increase \$ <input style="width: 80%;" type="text"/>	Decrease \$ <input style="width: 80%;" type="text"/>	<input type="checkbox"/> No Change	New Total IEP Amount \$ <input style="width: 80%;" type="text"/>

## TRADE INDIVIDUAL EMPLOYMENT PLAN (IEP) MODIFICATION FORM

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: _____		

8. TRA Eligibility (Must upload current printout of TRA Claim Details Screen from IBIS)
Number of eligible TRA weeks remaining: _____ OR TRA Exhaustion Date: ____/____/____
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

9. Training Weeks
Training weeks completed: _____ Training weeks being added: _____ Total training weeks: _____
With the Modification, the participant will complete training within the allowable 130 weeks utilizing Trade funding? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A If No, explain: _____

10. Certification & Affidavit	
<b>Notice of Certification:</b> I certify that the preceding information is correct to the best of my knowledge and that there is no intent to commit fraud.	
Participant Signature: _____	Date: ____/____/____
<b>AFFIDAVIT</b>	
I certify that the preceding information is correct to the best of my knowledge and that there is no intent to commit fraud. I hereby acknowledge that the information contained in this form that I am attesting to is complete and accurate and that the documentation described in the form is contained in the participant's file.	
10. Career Planner Signature: _____	Date: ____/____/____

End the **Training Service Record(s)** as unsuccessful completion on the date of last documented attendance.

Click on **List Enrolled Services**.

**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

**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 the name of the appropriate **Training Service Record** that you are ending.

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

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

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

**FAQs**  
[Home Done: Log Off](#)

**Services**

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

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Start Date	End Date	Service Provided	Status	Created By
12/15/2021	12/15/2021	<a href="#">Payable Training Interruption - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
12/10/2021		<a href="#">On-The-Job Training - TAA</a>	Pending Approval	<a href="#">Sheila Sloan</a>
12/08/2021		<a href="#">RTAA Registrant - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021	12/01/2021	<a href="#">Occupational Skills Training - TAA</a>	UnSuccessful Completion	<a href="#">Sheila Sloan</a>
12/01/2021	12/01/2021	<a href="#">Travel in Training - TAA</a>	UnSuccessful Completion	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Prerequisite Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Remedial Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
11/01/2021	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
10/25/2020	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>

Page 1 of 2

Enter the **End Date** (last date of documented attendance).  
Select **Unsuccessful Completion** from the drop down for **Current 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](#)

**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:** 12/02/2021  
**Last Updated By:** Sheila Sloan  
**Last Updated:** 12/02/2021  
**Approved/Denied By:** Sheila Sloan  
**Approved/Denied Date:**  
**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:** 320104   
**CIP Description:** Developmental/Remedial Mathematics.  
**\* O\*Net Code:** 433031  Requires O\*Net  
**Start Date:** 12/01/2021  
**\*Planned End Date:** 05/12/2022  
**End Date:**  
**\*Current Status:** Open ▼  
**\*Weekly Hours:** 4.0  
**\*Bridge Program Activity?** No ▼  
**Comments:** Math 099

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

End Travel and/or Subsistence Service Record.

Click the name of the Travel in Training/Subsistence in Training Service Record.

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

Add Enrolled Service
Printable Services
Return

Start Date	End Date	Service Provided	Status	Created By
12/15/2021	12/15/2021	<a href="#">Payable Training Interruption - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
12/10/2021		<a href="#">On-The-Job Training - TAA</a>	Pending Approval	<a href="#">Sheila Sloan</a>
12/08/2021		<a href="#">RTAA Registrant - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021	12/01/2021	<a href="#">Occupational Skills Training - TAA</a>	UnSuccessful Completion	<a href="#">Sheila Sloan</a>
12/01/2021	12/01/2021	<a href="#">Travel in Training - TAA</a>	UnSuccessful Completion	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Prerequisite Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
12/01/2021		<a href="#">Remedial Training - TAA</a>	Open	<a href="#">Sheila Sloan</a>
11/01/2021	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
10/25/2020	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>

Page 1 of 2
Next Page >

Page 1 of 2
Next Page >

Add Enrolled Service
Printable Services
Return



Enter the **End Date** (last date of documented attendance).  
Select **Successful Completion** from the drop down for **Current 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](#)

**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:** 12/02/2021  
**Last Updated By:** Sheila Sloan  
**Last Updated:** 12/30/2021  
**Approved/Denied By:** Sheila Sloan  
**Approved/Denied**

**Date:**  
**Title:** TAA  
**Service Level:** Job Training  
**Activity:** Travel in Training

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

**Provider:** \*1537-00 [Bradley University](#)

**Start Date:** 12/01/2021

**End Date:**

**\*Current Status:** Open ▼

**Comments:**

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

Update the IEP Status Record.

Click **List TAA Status** 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 this is a blue sidebar menu with sections for "Menus", "Case Notes", "Universal Services", and "FAQs". The "Application Menu" is highlighted in the sidebar. 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 four columns: "Application", "Profile", "Services", and "Exit". The "List TAA Status" option under the "Application" column is highlighted with a red box.

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

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

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

**FAQs**  
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**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 **View** beside the IEP Status Record.

**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 TAA Status

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

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/30/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/30/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

Enter a dated comment in the **Comment Box**.  
 Update the **IEP Amount Approved**, if applicable.  
 Click **Save**. This will set the record to 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](#)

### 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:** 11/30/2021

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

Upload the **IEP Modification 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** 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 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 "Application Menu" and displays user information: "Steve Perry Application Summary", "SSN: 0503", "App LWA:15", and "App Date:02/13/2019". A "Printable Application" button is visible. The menu is divided into three columns: "Application" (with 18 items), "Profile" (with 8 items, where "List All Documents" is highlighted with a red box), and "Services" (with 2 items). An "Exit" section at the bottom right contains 3 items.

**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 **Add Document**.

 **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 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"/>	<a href="#">Z1</a>	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 Individual Employment Plan** as the **Type**. If you upload the documents as separate documents, select the appropriate name from the drop down options for **Type**.

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

### Upload Document

Path:  Browse...

Type:

Copyrig 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 by forwarding the last state merit staff approval email for the participant and use the following format:

**Email Subject Line:** IEP Modification Request for approval for ending training services – “Participant First Name Initial and Last Name” – LWIA XX.

**Body of Email:**

Can we have an IEP modification approval for ending training services for:

**Participant Name:**

**Justification Statement:**

**State merit staff will do the following:**

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



If IDES denies (participant did meet benchmarks and can receive Completion TRA), the career planner will do the following:

Update the **Potential Suspension Status Record** with a dated comment in the **Comment Box** detailing the outcome of the IDES adjudication and enter a **Status End Date** (date of IDES determination).

Click **List TAA Status** on the **Application Menu** 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, there are three columns of links: "Application" (including 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, and List IDES View), "Profile" (including Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, and Measurable Skill Gains), and "Services" (including List Enrolled Services and List Part Time/Distance Learning). An "Exit" section contains links for Exit Summary, View Wages, and View TAA Costs. The "List TAA Status" link in the Application column is highlighted with a red box.

Click on **View** for the **Potential Suspension Request Status Record**.

IWDS
Illinois Workforce Development System
Case Management

### List TAA Status

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

	Start Date	End Date	Status	Approval Status	Last Updated By	Date
<input type="button" value="View"/>	12/15/2021	12/15/2021	Payable Training Interruption		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/15/2021		Potential Suspension Request	Pending Approval	<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/06/2021		Returned to Work		<a href="#">Sheila Sloan</a>	12/08/2021
<input type="button" value="View"/>	12/01/2021	12/11/2021	Ceased Participation in Training		<a href="#">Sheila Sloan</a>	12/15/2021
<input type="button" value="View"/>	12/01/2021		In Training		<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	11/30/2021	12/01/2021	Enrolled in Training - Not Yet Started	Approved	<a href="#">Sheila Sloan</a>	12/10/2021
<input type="button" value="View"/>	02/13/2019	04/14/2019	Waiver from Training Requirement	Approved	<a href="#">Sheila Sloan</a>	02/25/2019
<input type="button" value="View"/>	02/13/2019		IEP	Approved	<a href="#">Sheila Sloan</a>	11/30/2021

**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](#)

Enter the **Status End Date** (date of IDES outcome).  
 Enter a dated comment in the **Comment Box** describing the IDES outcome.  
 Click **Save**.

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**

[All Done: Log Off](#)

### 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:** Potential Suspension Request  
**Entry Date:** 12/15/2021  
**Status Start Date:** 12/15/2021  
**Status End Date:** 12/30/2021

**Suspension Request Reason:** Benchmarks Not Met - No Completion TRA

**Comments:** 12/30/2021 - Comment describing outcome from IDES.  
Participant failed to meet two benchmarks.

**Created By:** Sheila Sloan   **Date Created:** 12/15/2021  
**Last Updated By:** Sheila Sloan   **Date Last Updated:** 12/15/2021

Approval Type	Approver	Approved/Denied Date	Approval Status
Original			Pending Approval

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

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

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

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below the header is a blue sidebar menu on the left 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 on Trade Case Management – TAA.

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

**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	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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**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 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 outcome of the IDES adjudication and any other actions taken as a result of the outcome.

Click **Save and Return**.

The screenshot displays the IWDS (Illinois Workforce Development System) Case Management interface. On the left is a blue navigation menu with links for Staff Menu, Customer Menu, Application Menu, Case Notes, Universal Services, and FAQs. The main content area features a yellow informational message about Case Note completion. Below this is the 'Add Case Note' form for staff member Sheila Sloan. The form includes fields for Contact Date (11/01/2021), Program (TAA/NAFTA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management Services), and a Case Note text area containing 'Provided Case Management Service to participant.'. A 'Save and Return' button is located at the bottom of the form.

**Informational Message:**  
A Case Note needs to be completed when an Additional Episode is added to a Same Day Service on this application. Please enter the required fields, then click on Save and Return to complete this Case Note record. When you click on Save and Return, a Case Note will be added for this Same Day Service and the Same Day Service End Date will be updated with the Case Note Contact Date you enter on this screen.

**Add Case Note**  
[Steve Perry](#) [Application Summary](#)  
Staff Name: [Sheila Sloan](#)

\*Contact Date: 11/01/2021  
Program: TAA/NAFTA ▾  
\*Note Category: Case Note Supporting Same Day Service ▾  
\*Confidential: No ▾  
\*Note Subject: Case Management Services  
\*Case Note: Provided Case Management Service to participant.  
Save and Return

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.

**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

3 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
10/25/2020	11/01/2021	<a href="#">Trade Case Management - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>
02/13/2019		<a href="#">Individual Employment Plan - TAA</a>	Open	<a href="#">Sheila Sloan</a>
02/13/2019	04/14/2019	<a href="#">Issued Waiver - TAA</a>	Successful Completion	<a href="#">Sheila Sloan</a>

Page 1 of 1

Add Enrolled Service Printable Services Return

WIOA Application: No entry.



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

Trade Application: No entry.

**WIOA Application Entry (Add a New Episode to the Career Planning (Case Management) Service Record).**

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

The screenshot shows the IWDS Case Management interface. At the top is a red header with the IWDS logo and the text "Illinois Workforce Development System Case Management". Below this 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 the user info are three columns of links: "Application" (Guided Application, Application Definition, Assessment Summary, Concurrent Programs, Characteristics and Barriers, Employment, Characteristics, Education Status, Tests, Public Assistance, Family Characteristics, Income Calculation, Dislocated Worker Characteristics, LWA Specific Data, WIOA Training Criteria, Eligibility Determination), "Profile" (Contact Information, Additional Contacts, Private Information, Veterans Information, Employment History, Credentials, Education Status - In Program Update, Measurable Skill Gains, List All Documents), and "Services" (List Enrolled Services, ITA Characteristics, List Part Time/Distance Learning). The "Services" section is highlighted with a red box. At the bottom right, there is an "Exit" section with links for Exit Summary, View Wages, and Performance Impact.

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



- 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

1 found Page 1 of 1

Start Date	End Date	Service Provided	Status	Created By
11/01/2021	11/01/2021	<a href="#">Career Planning (Case Management) - IDC</a>	Successful Completion	<a href="#">Sheila Sloan</a>

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:** 11/01/2021  
**Last Updated By:** Sheila Sloan  
**Last Updated:** 11/01/2021  
**Title:** IDC  
**Service Level:** Career Services  
**Activity:** Career Planning (Case Management) **Same Day Service**  
**\*Grant:**    
**Provider:** \*1537-00 Bradley University  
**Start Date:** 11/01/2021  
**End Date:** 11/01/2021  
**Current Status:** Successful Completion  
**Comments:**

Complete the following fields:

**Contact Date** – This will autofill to the current date. If the case management is for a date other than the current date, enter the correct date.

**Program** – Select **WIOA** from the drop down list.

**Note Category** – Select the appropriate entry from the drop down list.

**Confidential** – Select **Yes** or **No** to indicate if the case note is confidential.

**Note Subject** – Enter a subject for the case note that describes what service is being provided.

**Case Note** – Enter a detailed case note detailing the outcome of the IDES adjudication and other actions taken as a result of the outcome.

Click **Save and Return**.

The screenshot displays the IWDS Case Management interface. At the top, a red banner contains the IWDS logo and the text "Illinois Workforce Development System Case Management". On the left, a blue sidebar menu lists 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 an Additional Episode to a Same Day Service. Below this is the "Add Case Note" form for staff member Steve Perry. The form includes fields for Staff Name (Sheila Sloan), Contact Date (11/01/2021), Program (WIOA), Note Category (Case Note Supporting Same Day Service), Confidential status (No), Note Subject (Case Management), and Case Note (11/1/21 Case Management for participant). A "Save and Return" button is located at the bottom of the form.

