

Illinois Workforce Development System (IWDS)



Background

- Illinois Department of Commerce and Economic Opportunity (DCEO) awards Workforce Innovation and Opportunity Act (WIOA) state-wide grants (grants issued directly from DCEO to an agency); these grants are housed under LWIA 90 within IWDS
- All activities for Federal Reporting on the State-wide grant recipients requires the client have their application in IWDS under LWIA 90
- Local Workforce Innovation Areas (LWIA's) receive formula grants each year from DCEO
- Individuals can be enrolled in services under both State-wide Grants as well as LWIA formula grants
- The key is the service plans for both the State-wide Grant and the LWIA formula grant clients must be coordinated

Additional Background

- For the LWIA 7 application, it was built under Career Connect, and then an interface has been created that feeds the information from the Career Connect application into IWDS, as IWDS serves as the official system of record the State of Illinois uses for WIOA Reporting.
- So it is important to understand that if you are wanting to co-enroll an individual in a State-wide Grant, who is a current WIOA LWIA 7 Registrant, you must make sure to find their LWIA 7 record in IWDS when creating the LWIA 90 record.

Why Co-Enroll

- Customers should **ONLY** be co-enrolled when there is a programmatic reason to leverage both traditional WIOA and state-wide grants, and when both grantees agree to co-enroll and coordinate services.
 - Examples for Co-enrollment reasons might be an instance where a State-wide Grant is set-up for an innovative, non-traditional training program that is not available under traditional WIOA formula funding
 - Other reasons might be if a State-wide grant is specifically set-up for a program that meets the clients assessed needs to regain full-time, self-sustaining employment. An example is enrollment in an Adult Apprenticeship currently administered by some of our state-wide grantees
 - Other reasons could include limited training dollars are available under traditional WIOA formula funding, so the State-wide grant picks up the training service and the LWIA formula grant might fund the supportive services
- ***Only co-enroll if both state-wide grant and formula grant have services the individual needs***

Objective

- The primary objective of this power point is to demonstrate the steps required for creating an application in IWDS under LWIA 90, for a client who is a current WIOA Registrant with their application appearing under LWIA 7 in IWDS.

Secondary Objectives

- Secondary objectives include discussing the importance of coordinating the plan for serving individuals who are going to be co-enrolled clients under State-wide Grants and traditional formula grants, demonstrating enrollment in services, closing services, recording credentials earned while in services, and documenting a measurable skill gain on a client.
- Lastly this power point will demonstrate exiting a client who had completed services and enrolling the client in Follow-up services.

LWIA 90 in IWDS

- LWIA 90 is the location in IWDS that houses all of the state-wide grants regardless of the title under which the client will be served

Working with IWDS

- A Career Planner who will work with clients under a State-wide Grant, must have a LWIA 90 IWDS User ID and password.
- This LWIA 90 IWDS User ID will be held separately from the traditional LWIA IWDS User ID and password.
- The LWIA 90 ID must be used for clients who you would like to serve with your State-wide grant

Working with IWDS

- When you have an IWDS User account, you must log-in to your IWDS User account at least once every 35 days or you will be locked out of IWDS due to long term inactivity

Working with IWDS

- If you are locked out of your LWIA 90 IWDS account, you contact either James (Jim) Potts at (217) 558-2456 or e-mail at james.potts@illinois.gov OR
- Kristofer (Kris) Theilen at (217) 557-5559 or e-mail at kristofer.theilen@illinois.gov

Logging in IWDS



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Staff Logon

Welcome to the Illinois Workforce Development system. Please enter your user name and password below.

User Name:

Password:

NOTICE: IWDS only supports Internet Explorer versions 6.0 and above.

Forgot your Password?

If you have forgotten your user name or password, please click the button below.

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IWDS Systems Administrator

- Up to five times you can attempt log-in before getting locked out
- Your local systems administrator is the contact to reset your IWDS account if you get locked out
- So for the state-wide grants housed under LWIA 90 you would contact either myself or my office partner Kris Theilen as we serve as systems administrator for LWIA 90



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Informational Message:

Last login was 01/23/2019 09.43 AM.

Next >

Welcome to Training.

Next >

Next >

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First thing you do?

- From the “Staff Menu” you must always search for the individual at the “Customer” level in IWDS
- Why is it important to search customers first before just adding an application?



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- [Outcomes-Final\(PYs reported to DOL\)](#)

• [Rect](#)

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Reporting

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IWDS Illinois Workforce Development System

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Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

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You can search many ways...

- What are the ways?

No Longer Search Full SSN

- For protection of Personally Identifiable Information (PII) the ability to search for a customer or applicant by complete Social Security Number (SSN) was removed from IWDS

Searching for a customer....

- IWDS will Search for exact spellings; different search ways:
 - Last Name
 - Last Name and First Name
 - Part of Last Name
 - Part of last Name and part of first name
 - Part of last Name and last four of SSN
 - Entire last Name and last four of SSN

Other newer search options....

- Added other ways to search for a customer which includes:
 - Just searching the last four of SSN
 - Part of first name and last four of SSN
 - Also the ability to use any of the previously listed combinations along with birth date could be used to search for a customer

Other newer search options....

- These other search options were needed because without the ability to search full SSN's, when a client was previously put in IWDS with a unique name, the client was difficult to identify

Searching for a customer....

- With many people who have the same name or in IWDS with misspelled names, I recommend search customer by first letter of the client's first name and first letter of last name along with last four of SSN for the best chance of identifying if your client is currently in IWDS

First Try This Way:



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Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

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Other Good Ways - especially for female clients

Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

Search Customers

Last Name:

First Name:

SSN # (Last 4 Digits):

Birth Date:

Filter List of Career Planners by LWA:

Any of those Searches would have found the record



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List Customers

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| | Name | SSN | Address | Applications | LWA |
|-------------------------------------|---------------|--------------|-------------------------------------|-------------------|-----|
| <input type="button" value="View"/> | Howard, David | ***-**- 1441 | 4821 N. Austin Chicago, IL 60634 | 1 | 7 |

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“View” brings up Customer Menu



IWDS Illinois Workforce Development System Case Management

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Referrals

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Customer Menu

[David Howard](#)

Applications

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Reports

- [Customer Info Report](#)
- [View Wages](#)

Rect

If Going to Co-enroll

- If you are going to co-enroll a current LWIA 7 Registrant, and if you are not the LWIA 7 Provider who currently has the client registered via Career Connect, you need to make contact with the current LWIA 7 WIOA Service Provider

List Application



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List Applications

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| | Name | SSN | App Date | Program | Status | TAA Status | Career Planner |
|-------------------------------------|---------------|-------------|------------|---------|------------|------------|-------------------------------|
| <input type="button" value="View"/> | Howard, David | ***-**-1441 | 07/02/2018 | WIOA | Registrant | | Danny Carlson |

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Information on LWIA 7 Career Planner

View Staff Information

Name: Danny Carlson

Partner: Chicago Cook Workforce Partnership

Illinois workNet(TM)Center: Chicago Cook Workforce Partnership

Address: 69 West Washington Street Suite 2860
Chicago, IL 60602

Work Phone: (312)603-0294

Email Address: dcarlson@workforceboard.org

Return

If not your LWIA 7 Client

- If you are going to co-enroll a current LWIA 7 Registrant who is not your original client, do your homework and check the following items on the clients current application:
 - Eligibility Certification Titles and the Documentation Used
 - Services the “Registrant” has had and continues to receive through the LWIA 7 grantee
 - Review Case Notes for any possible information about the current plan and contact that has been occurring

Review LWIA 7 Application



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SSN: 1441 **App LWA:7** **App Date:07/02/2018**

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Eligibility Determination

Eligibility Determination

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:7 App Date:07/02/2018

| | | Certify | Title / Program | Eligibility Date | Certification Date |
|-------------------------------|--------------------------|---------|---|------------------|----------------------------|
| Documentation | Criteria | Yes | 1A - Adult BSD Career Services | 07/02/2018 | 07/02/2018 |
| Documentation | Criteria | Yes | 1A - Adult BSD Training Services | 07/02/2018 | 07/02/2018 |
| Documentation | Criteria | Yes | 1A - Adult Low Income Career Services | 07/02/2018 | 07/02/2018 |
| Documentation | Criteria | Yes | 1A - Adult Low Income Training Services | 07/02/2018 | 07/02/2018 |

* Application Date: 07/02/2018

* Eligibility Determination Date:

[Printable Application](#)

[Determine Eligibility >](#)

Cancel

| Criteria | Conjunction |
|--|-------------|
| Documentation and Subcriteria | |
| (Authorized to Work in the U S | |
| Birth Certificate | AND |
| Compliant With Selective Service | |
| Selective Service Registration Card | AND |
| Age 18+ at Enrollment | |
| Birth Certificate | AND |
| (WIOA Income Eligible | |
| | OR |
| Food Stamp Recipient | |
| Public Assistance Records/Printout | OR |
| Homeless | |
| | OR |
| Foster Child | |
| | OR |
| Cash Welfare Recipient | |
| |) 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 | |
| |)) |

Cancel

Services Screen

Services

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:7 App Date:07/02/2018

Add Enrolled Service

Printable Services

Return

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| Start Date | End Date | Service Provided | Status | Created By |
|------------|------------|--|-----------------------|--------------------------------------|
| 11/19/2018 | 11/19/2018 | Diagnostic Testing - 1A | Successful Completion | James Potts (LWIA 7) |
| 08/22/2018 | | Adult education and literacy activities - 1A | Open | James Potts (LWIA 7) |
| 08/21/2018 | 08/21/2018 | Diagnostic Testing - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/17/2018 | 08/20/2018 | Adult education and literacy activities - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/10/2018 | 07/10/2018 | Job Club - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/02/2018 | 12/24/2018 | Case Management - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/02/2018 | 11/19/2018 | Development of an IEP - 1A | Successful Completion | James Potts (LWIA 7) |

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Add Enrolled Service

Printable Services

Return



List Case Notes

[David Howard](#) Application Summary

SSN: 1441 App LWA:7 App Date:07/02/2018

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| | Contact Date | Note Category | Program | Note Subject | Updated By |
|----------------------|--------------|---------------------------------------|---------|---|----------------------|
| View | 12/24/2018 | Case Note Supporting Same Day Service | WIOA | Two way Communication | James Potts (LWIA 7) |
| View | 11/19/2018 | Case Note Supporting Same Day Service | WIOA | Post assessment reading test | James Potts (LWIA 7) |
| View | 11/19/2018 | Case Note Supporting Same Day Service | WIOA | Updated IEP to reflect new TABE Scores and Plan | James Potts (LWIA 7) |
| View | 10/22/2018 | Case Note Supporting Same Day Service | WIOA | Two way Communication | James Potts (LWIA 7) |
| View | 09/22/2018 | Case Note Supporting Same Day Service | WIOA | Two way Communication | James Potts (LWIA 7) |
| View | 08/22/2018 | Case Note Supporting Same Day Service | WIOA | Updating IEP | James Potts (LWIA 7) |
| View | 08/21/2018 | Case Note Supporting Same Day Service | WIOA | Here to take post assessment math test | James Potts (LWIA 7) |
| View | 08/02/2018 | Case Note Supporting Same Day Service | WIOA | Two way Communication | James Potts (LWIA 7) |
| View | 07/10/2018 | Case Note Supporting Same Day Service | WIOA | Attended Monthly Job Club | James Potts (LWIA 7) |
| View | 07/02/2018 | Case Note Supporting Same Day Service | WIOA | Initial Case Management | James Potts (LWIA 7) |
| View | 07/02/2018 | Case Note Supporting Same Day Service | WIOA | Initial Individual Employment Plan (IEP) | James Potts (LWIA 7) |

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Client Not From Your Agency

- Now that you have done your homework on the client, reach out to the current WIOA Service Provider and work with them in regards to your communication and plan with the client.
- When co-enrolling from a current WIOA Registrant you can just get a copy of the current WIOA application and documentation that was used to support the eligibility on the original WIOA application; also get copies of scoring sheets of previous assessment tests.

Creating the LWIA 90 Application

- Now, regardless of if the client is your LWIA 7 client or if the client is from another LWIA 7 Service provider, the steps you will take are the same.
- First go back to the LWIA 7 “Application Menu” screen, click on “Application Definition” and get the original “Contact date”; in this example it is 7/2/2018 - note that as you will want to use this same date when you create your LWIA 90 application

Application Menu

Application Menu

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SSN: 1441 **App LWA:7** **App Date:07/02/2018**

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Application Definition

Application Definition

[David Howard](#)

Statutory Program: WIOA

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

TAA Act:

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

LWA: 07 - Chicago Cook Workforce Partnership

Illinois workNet(TM)Center: Arlington Heights Workforce Center - 8100

Arlington Heights Workforce Center - 8100

Contact Date: 07/02/2018 ←

Partner: Chicago Cook Workforce Partnership

Career Planner: Carlson, Danny

Carlson, Danny

Show on My Applications:

Cancel

Time to Create the LWIA 90 Application

- Go back to the original Customer record, click on “List Application”, which will take you to the screen on the next slide.

Original “List Application”

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List Applications

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| | Name | SSN | App Date | Program | Status | TAA Status | Career Planner |
|-------------------------------------|---------------|-------------|------------|---------|------------|------------|-------------------------------|
| <input type="button" value="View"/> | Howard, David | ***-**-1441 | 07/02/2018 | WIOA | Registrant | | Danny Carlson |

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Creating LWIA 90 Application

- When you are logged in with your LWIA 90 IWDS User ID, and click on “List Application” it will bring up the LWIA 90 “Application Definition Screen” for the client.

Application Definition Screen

Application Definition

[David Howard](#)

***Statutory Program:**

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

TAA Act:

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

LWA: 90 - State Workforce Investment Area

***Illinois workNet(TM)Center:**

***Contact Date:**

Partner: 90-State Workforce Investment Area

Career Planner: Potts, Jim

Show on My Applications:

Application Definition Screen

- Statutory Program is WIOA.
- LWA will be auto populated with LWA 90, if not, then you are not logged in with your LWIA 90 User ID.
- Illinois workNet Center: populate with LWA 007-007
- Contact Date, as mentioned earlier for this example client is 7/2/2018 (more on this in a bit)
- Partner is 90 - State Workforce Investment Area
- Your Name goes in Career Planner
- Show Application: Populate with “Yes”

Contact Date for Application

- The importance of the Contact Date is that no activity can ever be recorded on the application on any date prior to whatever date you record as the application contact date
- This is especially important if you are working with a client who is a current Registrant under a traditional LWIA, and you intend to co-enroll under your State-wide Grant housed under LWIA 90
- In this case, I recorded the contact date as 7/02/2018

Once Completed Click “Next”

Application Definition

[David Howard](#)

*Statutory Program:

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

TAA Act:

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

LWA: 90 - State Workforce Investment Area

*Illinois workNet(TM)Center:

*Contact Date:

Partner: 90-State Workforce Investment Area

Career Planner: Potts, Jim

Show on My Applications:

Guided Applications

Create WIOA Application

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

▶ **1Y**

In-School Youth
 Out-of-School Youth

▶ **1A**

Adult Career Services
 Adult Training Services

▶ **1D - 1N - 1S - 1E - 1DC - 1EC**

Dislocated Worker Career Services - Displaced Homemaker
 Dislocated Worker Career Services - Formerly Self-Employed
 Dislocated Worker Career Services - Plant Closure or Substantial Lay-off
 Dislocated Worker Career Services - Spouse of Active Duty Service Member
 Dislocated Worker Career Services - Unlikely to Return to Previous Industry or Occupation
 Dislocated Worker Training Services - Displaced Homemaker
 Dislocated Worker Training Services - Formerly Self-Employed
 Dislocated Worker Training Services - Plant Closure or Substantial Lay-off
 Dislocated Worker Training Services - Spouse of Active Duty Service Member
 Dislocated Worker Training Services - Unlikely to Return to Previous Industry or Occupation

Different applications ask different questions?

- The application(s) are selected will determine the questions that will be asked
- For this example client, since the client is an Adult Client under the LWIA 7 application, and we are using that application, we will check the guided for Adult Career Services and Adult Training Services.

Guided Applications

Create WIOA Application

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

▶ 1Y

In-School Youth
 Out-of-School Youth

▶ 1A

Adult Career Services
 Adult Training Services

▶ 1D - 1N - 1S - 1E - 1DC - 1EC

Dislocated Worker Career Services - Displaced Homemaker
 Dislocated Worker Career Services - Formerly Self-Employed
 Dislocated Worker Career Services - Plant Closure or Substantial Lay-off
 Dislocated Worker Career Services - Spouse of Active Duty Service Member
 Dislocated Worker Career Services - Unlikely to Return to Previous Industry or Occupation
 Dislocated Worker Training Services - Displaced Homemaker
 Dislocated Worker Training Services - Formerly Self-Employed
 Dislocated Worker Training Services - Plant Closure or Substantial Lay-off
 Dislocated Worker Training Services - Spouse of Active Duty Service Member
 Dislocated Worker Training Services - Unlikely to Return to Previous Industry or Occupation

Guided Applications

- When you go through the Guided Application for a client that you are co-enrolling under LWIA 90, you will need the following items:
 - Copy of the original LWIA 7 completed and signed application along with copies of all documentation used to support eligibility
 - Copies of the previous assessment tests scoring sheets

LWIA 90 Application

- Most of the information from the original LWIA 7 application will carry over in the LWIA 90 application. Items that do not carry over, you can get from the copy of the original LWIA 7 application.
- Once you have completed the LWIA 90 application you will want to certify the clients eligibility. This is where it is important to have copies of all the documentation used from the original LWIA 7 application certification.

Two Separate Files

- Even if you are the provider for both the LWIA 7 and the LWIA 90 application, there needs to be two complete separate files for each grant because they will be monitored separately and could get selected for Data Validation separately.
- However, both files should look the same for the application and eligibility certification/documentation, but then the different paperwork on the services provided after certification of course will be different as it should support the services that the grant funds.

Duplicate IEP's

- For co-enrolled Adult (or Dislocated Worker clients) under both LWIA 7 and LWIA 90, the Individual Employment Plan (IEP) should explain which grant is funding which service(s), but the overall objectives and goal for both IEP's should mirror one another.

Same for Youth

- Same for Youth, for co-enrolled clients under both LWIA 7 and LWIA 90, the Individual Service Strategy (ISS) should explain which grant is funding which service activities, but the overall objectives and goal for both ISS' should mirror one another.

Career Connect IEP/ISS

- Demonstration of how to label IEP/ISS Objectives in CC when a customer is co-enrolled.
- At this time Dena is going to demonstrate in “test” Career Connect

Now you have seen:

- An LWIA 90 application created in IWDS
- This application encompassed an Adult application, in this example it is based off of LWIA 7 Adult Registrant David Howard
- For the next portion we will determine eligibility, certify the client in the same WIOA titles that were certified under the LWIA 7 application, and then demonstrate enrollment in a WIOA Service of “Development of IEP” under a WIOA State-wide Grant

Eligibility Determination

Eligibility Determination

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Guided Application

| | Certify | Title / Program | Eligibility Date | Certification Date |
|--------------------------------------|---------|-----------------|------------------|--------------------|
| No Title/Programs were found. | | | | |

* Application Date:

Recta

* Eligibility Determination Date:

Printable Application

Determine Eligibility >

Eligibility Determination Date(s)

- For this client, his eligibility determination should be whenever the LWIA 90 Career Planner began working with the individual.
- It could be any date on or after 7/2/2018 since that was the original contact date and certification date of the LWIA 7 application which the eligibility is derived from.
- In this example the LWIA 90 Career Planner staff began working with the client after the new year, so we are using the date of 1/2/2019 for both the eligibility determination and certification date.

Eligibility Determination Date(s)

Eligibility Determination

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Guided Application

| | Certify | Title / Program | Eligibility Date | Certification Date |
|--------------------------------------|---------|-----------------|------------------|--------------------|
| No Title/Programs were found. | | | | |

* Application Date: 1/2/2019

* Eligibility Determination Date: 1/2/2019

Printable Application

Determine Eligibility >

Titles for Eligibility

Eligibility Determination

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

| | | Certify | Title / Program | Eligibility Date | Certification Date |
|-------------------------------|--------------------------|--------------------------|---|------------------|--------------------|
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult Career Services | 01/02/2019 | |
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult BSD Career Services | 01/02/2019 | |
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult Training Services | 01/02/2019 | |
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult BSD Training Services | 01/02/2019 | |
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult Low Income Career Services | 01/02/2019 | |
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult Low Income Training Services | 01/02/2019 | |

Show All Subgroups

Application Date: 01/02/2019

Printable Application

Certify >

Adult Titles

- Since we are using the Adult application from a current LWIA 7 Registrant for the LWIA 90 application, the client should be, and in this case is, eligible under the exact same criteria as the client was under the LWIA 7 Grant.
- Since we received copies of the original signed application and documentation that supported the eligibility from the current LWIA 7 application, everything should match.
- A word of caution on this, **IF** the original LWIA 7 application incorrectly determined an individual eligible, and there is not documentation to support eligibility, **DO NOT** use the incorrect documentation and certify the LWIA 90 application.

More on this.....

- When you are co-enrolling a client with a current WIOA application, **if you determine the original application and documentation does not support the client being eligible to receive WIOA services, you cannot use the original application.**
- You could then only serve the client by taking a new application and collecting the documentation that can support WIOA Eligibility.
- I would then recommend letting the original grantee who determined the client eligible incorrectly know what you have discovered.

From slide 35 - documentation from LWIA 7 Application

Cancel

| Criteria Documentation and Subcriteria | Conjunction |
|---|-------------|
| (Authorized to Work in the U S Birth Certificate | AND |
| Compliant With Selective Service Selective Service Registration Card | AND |
| Age 18+ at Enrollment Birth Certificate | AND |
| (WIOA Income Eligible | OR |
| Food Stamp Recipient Public Assistance Records/Printout | OR |
| Homeless | OR |
| Foster Child | OR |
| Cash Welfare Recipient |) 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 |)) |

Cancel

Now I will populate LWIA 90 Documentation for Adult Low Income Training

Save Cancel

| Criteria | Conjunction |
|--|-------------|
| Documentation and Subcriteria | |
| (Authorized to Work in the U S | |
| Birth Certificate | AND |
| Compliant With Selective Service | |
| Selective Service Registration Card | AND |
| Age 18+ at Enrollment | |
| Birth Certificate | AND |
| (WIOA Income Eligible | |
| | OR |
| Food Stamp Recipient | |
| Public Assistance Records/Printout | OR |
| Homeless | |
| | OR |
| Foster Child | |
| | OR |
| Cash Welfare Recipient | |
|) | 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 | |
|) | |

Save Cancel

Now I will populate LWIA 90 Documentation for Adult BSD Training

Save Cancel

| Criteria | Conjunction |
|--|-------------|
| Documentation and Subcriteria | |
| (Authorized to Work in the U S | |
| Birth Certificate | AND |
| Compliant With Selective Service | |
| Selective Service Registration Card | AND |
| Age 18+ at Enrollment | |
| Birth Certificate | 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 |) |

Save Cancel

Certification on LWIA 90 Adult Priority Titles

Eligibility Determination

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

| | | Certify | Title / Program | Eligibility Date | Certification Date |
|-------------------------------|--------------------------|-------------------------------------|---|------------------|--------------------|
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult Career Services | 01/02/2019 | |
| Documentation | Criteria | <input checked="" type="checkbox"/> | 1A - Adult BSD Career Services | 01/02/2019 | |
| Documentation | Criteria | <input type="checkbox"/> | 1A - Adult Training Services | 01/02/2019 | |
| Documentation | Criteria | <input checked="" type="checkbox"/> | 1A - Adult BSD Training Services | 01/02/2019 | |
| Documentation | Criteria | <input checked="" type="checkbox"/> | 1A - Adult Low Income Career Services | 01/02/2019 | |
| Documentation | Criteria | <input checked="" type="checkbox"/> | 1A - Adult Low Income Training Services | 01/02/2019 | |

Show All Subgroups

Application Date: 01/02/2019

Printable Application

Certify >

Certification Screen

Certification

[David Howard](#) [Application Summary](#)

SSN: 1441 **App LWA:**90

Title / Program(s): 1A - Adult Low Income Career Services
1A - Adult Low Income Training Services
1A - Adult BSD Career Services
1A - Adult BSD Training 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.

No ▾

Rect

Date:

< Back

Next >

Certification Date

Certification

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Title / Program(s): 1A - Adult Low Income Career Services
1A - Adult Low Income Training Services
1A - Adult BSD Career Services
1A - Adult BSD Training 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.

Yes ▾

Rect

Date: 1/2/2019

< Back

Next >

Applicant Record

Services

[David Howard](#) [Application Summary](#)
SSN: 1441 App LWA:90

Next >

Add Enrolled Service

0 found

Page 1 of 1

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

Page 1 of 1

Add Enrolled Service

Next >

Applicant Record

- Once a client is certified, they are considered an “Applicant” within the IWDS logic.
- An individual can stay as an “Applicant” for up to 45 days after certification. If not enrolled in services within 45 days after certification the record is really just a “lame duck” application as no services can be added.
- Typically a client is only going to be certified when a grantee is getting ready to enroll a client in WIOA services.

Enrollment in Career Services

Select Service Level and Start Date

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Title: 1A

*Service Level:

*Start Date:

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Next >

Cancel

Enrollment in WIOA Services

- For the LWIA 90 applications, it is really important for the grantee to know their grant number as all grantee's have access to all other state-wide grants under the same title

Adult Career Services

Select Activity

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Title: 1A
Service Level: Career Services
***Activity:** Asset Development
Start Date:

- Asset Development
- Career Planning
- Case Management
- Child/Dependent Care
- Development of an IEP
- Diagnostic Testing
- English language acquisition and integrated education and training
- Federal Job Referral and Placement Services
- Financial Literacy Education
- Follow-up Services
- Group Counseling
- Health Care
- Holding
- Housing Assistance
- In-depth interviewing and evaluation
- Individual Job Development
- Integrated Resource Team
- Internship
- Job Club
- Job Referral and Placement Services
- Job Search Skills Training
- Needs Related Payments
- NEG Disaster - Temporary Job
- Other Job Search Assistance
- Other Supportive Services
- Out-of-Area Job Search
- Paid Work Experience
- Personal Counseling
- Relocation
- Screened Referral

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Development of an IEP

- IWDS logic requires that every WIOA client must be enrolled in the Career Service of “**Development of an IEP**” before the client can be enrolled in any training services.
- Next several slides will demonstrate enrollment in this service under a State-wide grant.

Development of an IEP

Select Activity

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Title: 1A

Service Level: Career Services

* Activity:

Start Date: 01/02/2019

< Back

Next >

Cancel

Know your Grant

Add Required Activity Information

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Created By: Jim Potts

Title: 1A

Service Level: Career Services

Activity: Development of an IEP **Same Day Service**

*Grant:

Provider: *

Start Date: 01/02/2019

End Date:

*Current Status:

*Weekly Hours:

Comments:

Select your Grant

Add Required Activity Information

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Created By: Jim Potts

Title: 1A

Service Level: Career Services

Activity: Development of an IEP **Same Day Service**

***Grant:**

Provider: 16633441-State Workforce Investment Area - ABC IL

Start Date: 17634050-DCEO - Chicago Women in Trades

End Date: 17634051-DCEO - Institute for Latino Progress

***Current Status:** 17634052-DCEO - Career Link
17634053-DCEO - McHenry County College District 528

***Weekly Hours:** 17634054-DCEO - Safer Foundation

Comments: 17634055-DCEO - Skills for Chicagoland's Future

17634056-DCEO - SIU E

17634057-DCEO - SYMBOL

17634058-DCEO - Prairie State College

17634059-DCEO - National ABLE

17634061-DCEO - CALUMET

17634062-DCEO - Moraine Valley CC

< Back

Save

Cancel

In this example using Symbol

Add Required Activity Information

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Created By: Jim Potts
Title: 1A
Service Level: Career Services
Activity: Development of an IEP **Same Day Service**
*Grant:
Provider: *
Start Date: 01/02/2019
End Date:
*Current Status:
*Weekly Hours:
Comments:

Provider Relationships

Click “Search Provider”

Add Required Activity Information

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Created By: Jim Potts

Title: 1A

Service Level: Career Services

Activity: Development of an IEP **Same Day Service**

*Grant: 17634057-DCEO - SYMBOL

Provider: * Search Providers

Start Date: 01/02/2019

End Date:

*Current Status: Open

*Weekly Hours:

Comments:

Additional Info

< Back

Save

Cancel

Click on “Show All”

Search Provider Relationships

Show All ←

Provider Relationship Name:

Relationship Number:

 -

Statutory Program: WIOA

Title: 1A

Service Level: Career Services

Activity: Development of an IEP

Start Date: 01/02/2019

Rec

Search

Return

List Provider Relationships

[Return To Search](#)

5 found Page 1 of 2 [Next Page >](#)

| | Provider Name | Relationship ID | Relationship Type |
|----------------------|----------------------------------|--------------------------------|-------------------|
| Pick | Jane Addams Resource Corp | 17252014-90 | Contract |
| Pick | Moraine Valley Community College | 17634062-90 | Contract |
| Pick | Prairie State College | PrairieSt90-90 | Contract |

Page 1 of 2 [Next Page >](#)

[Return To Search](#)

List Provider Relationships

[Return To Search](#)

5 found Page 2 of 2 [< Prev Page](#)

| | Provider Name | Relationship ID | Relationship Type |
|----------------------|---|--------------------------------|-------------------|
| Pick | Southern Illinois University Edwardsville | 17634056-90 | Contract |
| Pick | Symbol Training Institute | RR 16654121-90 | Contract |

Page 2 of 2 [< Prev Page](#)

[Return To Search](#)

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If your Provider is not shown:

- Couple things, first make sure you have the correct title selected that your State-wide Grant states you can serve clients. 1A is self-explanatory, but many times if your grant is serving Dislocated Workers, often the title under State-wide grant is 1E.
- If you have the correct title and your Provider is not appearing, as previously mentioned, myself or my office partner Kris Theilen serve as Local Systems Administrators for LWIA 90 and we can work with you to get your Provider/Entity Relationship set-up correctly

Same Day Service

Add Required Activity Information

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90

Guided Application

Created By: Jim Potts

Title: 1A

Service Level: Career Services

Activity: Development of an IEP Same Day Service

*Grant: 17634057-DCEO - SYMBOL

Provider: [RR 16654121-90 Symbol Training Institute](#) * Search Providers

Start Date: 01/02/2019

End Date:

*Current Status: Open

*Weekly Hours: 2

Comments:

Additional Info

< Back

Save

Cancel

Same Day Service

- In IWDS there are several services that are considered “Same Day Services” meaning the system will auto close the service on the date it is created.
- On these same day services it automatically sends you to same day service case note.
- When you finish the note and save, the service will then display the end date and mark the service as Successful.

Same Day Service Case Note

Informational Message:

A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.

Add Case Note

[David Howard](#) [Application Summary](#)

Staff Name: [Jim Potts](#)

• Recta

Contact Date: 01/02/2019

Program:

* Note Category:

* Confidential:

* Note Subject:

* Case Note:

Save and Return

Same Day Service Case Note

Informational Message:

A Case Note needs to be completed when a Same Day Service is added to the application. Please enter the required fields, then click on Save and Return to complete this Case Note record. Note that the Same Day Service status has been set to Successful Completion with a Service End Date equal to the Service Start Date. When you click on Save and Return, a Case Note will be added for this Same Day Service.

Add Case Note

[David Howard](#) [Application Summary](#)

Staff Name: [Jim Potts](#)

Recta

Contact Date: 01/02/2019

Program: WIOA

*Note Category: Case Note Supporting Same Day Service

*Confidential: No

*Note Subject: Initial Individual Employment Plan (IEP)

*Case Note:

This is a co-enrolled LWIA 7 client who had been receiving services with BCS; see the hard copy of the IEP in the file.

Save and Return

Services Screen

Services

[David Howard](#) [Application Summary](#)
 SSN: 1441 App LWA:90

Next >

Add Enrolled Service

1 found Page 1 of 1

| Start Date | End Date | Service Provided | Status | Created By |
|------------|------------|--|-----------------------|---------------------------|
| 01/02/2019 | 01/02/2019 | Development of an IEP - 1A | Successful Completion | Jim Potts |

Page 1 of 1

Add Enrolled Service

Next >

Client is now a LWIA 90 Registrant

- Once your LWIA 90 client is enrolled in a service, they then are considered a “Registrant”.
- As mentioned, for any client who is co-enrolled under LWIA 90 and LWIA 7, the services must be coordinated between both grantees and the plan (IEP for Adult or Dislocated Worker & ISS for Youth) must be coordinated and address which grants are funding the various services the co-enrolled client will be receiving.

Other Services

- I am going to go ahead and record the other LWIA 90 services for this example client:
 - Career Planning
 - Case Management
 - Occupational Classroom Training

LWIA 90 Services

Services

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

[Add Enrolled Service](#) [Printable Services](#) [Return](#)

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| Start Date | End Date | Service Provided | Status | Created By |
|------------|------------|--|-----------------------|---------------------------|
| 01/07/2019 | | Occupational Classroom Training - 1A | Open | Jim Potts |
| 01/02/2019 | 01/02/2019 | Development of an IEP - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 01/02/2019 | Career Planning - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 01/07/2019 | Case Management - 1A | Successful Completion | Jim Potts |

Page 1 of 1

[Add Enrolled Service](#) [Printable Services](#) [Return](#)

Co-enrolled Under LWIA 7 & 90

List Applications

[Return](#)

2 found

Page 1 of 1

| | Name | SSN | App Date | Program | Status | TAA Status | Career Planner |
|----------------------|---------------|--------------|------------|---------|------------|------------|--|
| View | Howard, David | ***-**- 1441 | 07/02/2018 | WIOA | Registrant | | Danny Carlson |
| View | Howard, David | ***-**- 1441 | 01/02/2019 | WIOA | Registrant | | Jim Potts <small>Rec</small> |

Page 1 of 1

[Return](#)

CC Co-enrollment Services

- Demonstration of adding a “Co-enrollment” services in CC.

LWIA 7 Services

- So now lets go back and review the LWIA 7 services this client is enrolled in under the formula grant

Co-Enrolled under LWIA 7

Services

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:7 App Date:07/02/2018

Add Enrolled Service

Printable Services

Return

9 found

Page 1 of 1

| Start Date | End Date | Service Provided | Status | Created By |
|------------|------------|--|-----------------------|--------------------------------------|
| 01/07/2019 | | Transportation - 1A | Open | James Potts (LWIA 7) |
| 01/07/2019 | | Training in Other Title - 1A | Open | James Potts (LWIA 7) |
| 11/19/2018 | 11/19/2018 | Diagnostic Testing - 1A | Successful Completion | James Potts (LWIA 7) |
| 08/22/2018 | | Adult education and literacy activities - 1A | Open | James Potts (LWIA 7) |
| 08/21/2018 | 08/21/2018 | Diagnostic Testing - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/17/2018 | 08/20/2018 | Adult education and literacy activities - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/10/2018 | 07/10/2018 | Job Club - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/02/2018 | 01/07/2019 | Case Management - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/02/2018 | 01/02/2019 | Development of an IEP - 1A | Successful Completion | James Potts (LWIA 7) |

Page 1 of 1

Add Enrolled Service

Printable Services

Return

Details of Co-enrolled Clients

- It is essential both grantees record services accurately and timely; it is of the utmost importance to close service lines when a clients actual service ends.
- Both grantees must understand the client cannot be exited from one grant, if the client has open services with another grant.
- This is yet another reason that the communication between both grantees is essential and as mentioned, each plan should mirror the objectives and overall goal for any co-enrolled client.

Exit - When Should it Occur?

- A WIOA Registrant must be exited when they are no longer are receiving any WIOA service (under either grant) for 90 days.
- The exit date is always going to reflect back to the last date the client received a WIOA service.

Exiting a Co-enrolled Client

- The LWIA 7 and LWIA 90 staff must coordinate the closure/exit in both programs.
- All services must be closed in both systems. (The Career Connect “Co-enrollment” service should be closed with an end date equal to the exit date.)
- As previously mentioned, both grantees must understand the client cannot be exited from one grant if the client has open services with another grant.

Exiting a Co-enrolled Client

- For internal Career Connect logic, the LWIA 90 Exit must be completed in IWDS first. (The LWIA 7 exit will not transmit to IWDS if the LWIA 90 application is still open.)
- The LWIA 7 Closure/Exit should be completed in Career Connect ***immediately after (on the same date)*** that the LWIA 90 exit is completed.

Closing the LWIA 90 Services

Edit Required Activity Information

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Created By: Jim Potts
Date Created: 02/20/2019
Last Updated By: Jim Potts
Last Updated: 02/20/2019
Title: 1A
Service Level: Training Services
Activity: Occupational Classroom Training
*Grant: 17634057-DCEO - SYMBOL

ITA Funded Training: No
Contract Funded Training: Yes
*Green Related: No

Provider: [RR 16654121-90 Symbol Training Institute](#)
CNC 203: CNC Programming, Setup and Operation
Certified Program: Search Certified Programs

CIP Code: 143601
CIP Description: Manufacturing Engineering
* O*Net Code: 514012 Search View Available
Requires O*Net

Start Date: 01/07/2019
End Date: 2/20/2019
*Current Status: Successful Completion
*Weekly Hours: 15.0
*Bridge Program Activity? No

Comments:

Additional Info

Save Cancel

Closing the LWIA 90 Services

Informational Message:
Update Successful

Services

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

[Add Enrolled Service](#) [Printable Services](#) [Return](#)

4 found

Page 1 of 1

| Start Date | End Date | Service Provided | Status | Created By |
|------------|------------|--|-----------------------|---------------------------|
| 01/07/2019 | 02/20/2019 | Occupational Classroom Training - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 01/02/2019 | Development of an IEP - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 01/02/2019 | Career Planning - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 02/08/2019 | Case Management - 1A | Successful Completion | Jim Potts |

Page 1 of 1

[Add Enrolled Service](#) [Printable Services](#) [Return](#)

Recording Earned Credentials

- All industry recognized credentials earned while in WIOA services must be recorded.
- In this “example” client, he earned a CNC Certified Machinist credential on 2-20-19 so I will demonstrate recording that credential.

Record Credential

Application Menu

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Printable Application

Application

- [Guided Application](#)
- [Application Definition](#)
- [Assessment Summary](#)
- [Concurrent Programs](#)
- [Characteristics and Barriers](#)
- [Employment Characteristics](#)
- [Education Status](#)
- [Tests](#)
- [Public Assistance](#)
- [Family Characteristics](#)
- [Income Calculation](#)
- [Dislocated Worker Characteristics](#)
- [WIOA Training Criteria](#)
- [Eligibility Determination](#)

Profile

- [Contact Information](#)
- [Additional Contacts](#)
- [Private Information](#)
- [Veterans Information](#)
- [Employment History](#)
- [Credentials](#) ←
- [Education Status - In Program Update](#)
- [Measurable Skill Gains](#)
- [List All Documents](#)

Services

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

• Rec

Exit

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

Record Credential Earned

Add Credential

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

*Credential: Occupational Skills Certificate or Credential

*Institution: NIMS

*Source: Copy of certificate

*Date Attained: 2/20/2019

*Description of Credential/Diploma: Certified CNC Machinist

Informational Message:
Update Successful

List Credentials

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

1 found

Page 1 of 1

| Credential | Institution | Date Attained | Updated By | Created |
|---|-------------|---------------|---------------------------|----------------------------|
| Occupational Skills Certificate or Credential | NIMS | 02/20/2019 | Jim Potts | 2019-02-20 13:40:18.479 |

Page 1 of 1

Record Measurable Skill Gain

- A newer performance indicator (separate power point will be conducted on the details of Measurable Skill Gains).
- In this “example” client his credential earned also meets the criteria of a Measurable Skill Gain, so the next few slides will demonstrate recording the Measurable Skill Gain.

Record Measurable Skill Gain

Application Menu

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

[Printable Application](#)

Application

- [Guided Application](#)
- [Application Definition](#)
- [Assessment Summary](#)
- [Concurrent Programs](#)
- [Characteristics and Barriers](#)
- [Employment Characteristics](#)
- [Education Status](#)
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- [Dislocated Worker Characteristics](#)
- [WIOA Training Criteria](#)
- [Eligibility Determination](#)

Profile

- [Contact Information](#)
- [Additional Contacts](#)
- [Private Information](#)
- [Veterans Information](#)
- [Employment History](#)
- [Credentials](#)
- [Education Status - In Program Update](#)
- [Measurable Skill Gains](#)
- [List All Documents](#)

Services

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

Exit

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



Add Skill Gain

List Measurable Skill Gains

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Add Skill Gain

Return

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

Skills Progressions/Diploma

Maintain Measurable Skill Gain

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

* Skill Type: Skills Progression/Diploma

* Date Skill Attained: 2/20/2019

Comment: Certified CNC Machinist

Verification: I have verified that this customer has met the requirements listed below for the Skill Type selected.

Save Cancel

| Skill Type | Requirement |
|--------------------------------------|---|
| Postsecondary Transcript/Report Card | Participant's transcript or report card for postsecondary education who complete a minimum of 12 hours per semester, or for part time students a total of at least 12 credit hours over the course of two completed consecutive semesters during the program year, that shows a participant is meeting the State unit's academic standards. |
| Secondary Transcript/Report Card | Participant's transcript or report card for secondary education for one semester showing that the participant is meeting the State unit's academic standards. |
| Skills Progression/Diploma | Participant successfully completed an exam that is required for a particular occupation, or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams and/or diploma. |
| Training Milestone | Participant had a satisfactory or better progress report towards established milestones from an employer/training provider who is providing training (e.g., completion of on-the-job training (OJT), completion of one year of a registered apprenticeship program, etc.). |
| Educational Functioning Level (EFL) | Will be automatically generated by the system. |

Preparing Client for Exit in CC

- Demonstration closing of services of a “Co-enrollment” client in CC.
- Recording Measurable Skill Gains in CC.
- Making Sure Credentials are Recorded in CC.

Co-Enrolled Services Closed

Services

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:7 App Date:07/02/2018

9 found Page 1 of 1

| Start Date | End Date | Service Provided | Status | Created By |
|------------|------------|--|-----------------------|--------------------------------------|
| 01/07/2019 | 02/20/2019 | Transportation - 1A | Successful Completion | James Potts (LWIA 7) |
| 01/07/2019 | 02/20/2019 | Training in Other Title - 1A | Successful Completion | James Potts (LWIA 7) |
| 11/19/2018 | 01/21/2019 | Diagnostic Testing - 1A | Successful Completion | James Potts (LWIA 7) |
| 08/22/2018 | 01/21/2019 | Adult education and literacy activities - 1A | Successful Completion | James Potts (LWIA 7) |
| 08/21/2018 | 08/21/2018 | Diagnostic Testing - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/17/2018 | 08/20/2018 | Adult education and literacy activities - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/10/2018 | 07/10/2018 | Job Club - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/02/2018 | 01/07/2019 | Case Management - 1A | Successful Completion | James Potts (LWIA 7) |
| 07/02/2018 | 01/02/2019 | Development of an IEP - 1A | Successful Completion | James Potts (LWIA 7) |

Page 1 of 1

Exiting the LWIA 90 Application

- As previously addressed, a WIOA Registrant must be exited when they are no longer are receiving any WIOA service for 90 days.
- For this “example” client we are going to go ahead and demonstrate the steps for exiting the client now.
- In IWDS, on the LWIA 90 application at the “Application Menu”.
- Click on “Exit Summary”

Employment at Exit

- For this example client, he was fortunate enough to obtain employment on the date he completed training (wouldn't it be nice if every client had this magically occur!)

Employment at Exit

- In IWDS the “Employment at Exit” is recorded on the “Exit Summary” screen.
- So the next several slides will demonstrate the steps to record this “example” clients new employment.

Application Menu

Application Menu

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

[Printable Application](#)

Application

- [Guided Application](#)
- [Application Definition](#)
- [Assessment Summary](#)
- [Concurrent Programs](#)
- [Characteristics and Barriers](#)
- [Employment Characteristics](#)
- [Education Status](#)
- [Tests](#)
- [Public Assistance](#)
- [Family Characteristics](#)
- [Income Calculation](#)
- [Dislocated Worker Characteristics](#)
- [WIOA Training Criteria](#)
- [Eligibility Determination](#)

Profile

- [Contact Information](#)
- [Additional Contacts](#)
- [Private Information](#)
- [Veterans Information](#)
- [Employment History](#)
- [Credentials](#)
- [Education Status - In Program Update](#)
- [Measurable Skill Gains](#)
- [List All Documents](#)

Services

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

[Rec](#)

Exit

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

Update - Employment at Exit

Exit Control Panel

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

[Return](#)

| | | | |
|---------------------------|--|--|------------------------|
| GENERAL | | Exit Date: NOT EXITED | Update |
| <u>Title</u> 1A | <u>Registration Date</u> 01/02/2019 | <u>Exit Reason</u> | Rec |
| CREDENTIALS | | Enter Credentials Attained | Update |
| EMPLOYMENT AT EXIT | | No Employment Specified | Update |
| 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 | |



Click on “Pick Job”

Employment at Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date:

School Status at Exit:

| | |
|--|-----------------|
| Employer Name: Employment Start: Employment End: Contact Name: Contact Phone: O*Net: Non Traditional: | Pick Job |
|--|-----------------|

Source Employed:

Job Type:

*Related to Training?

Determination Method:

- Comparison of the Occupation codes between training activity and job
- Compared industry of employment with the Occupation of training using an appropriate crosswalk
- Other appropriate method

Save

Cancel

Add Job

List Work History

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Add Job

Return

0 found

Page 1 of 1

| Employer Name | Employment Dates | Dislocation Job? |
|-------------------------------------|------------------|------------------|
| There is nothing to display. | | |

Page 1 of 1

Add Job

Return

Record Employment at Exit

Add Job

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Save Cancel

*Employer Name: Search

*Employment Status:

*Start Date: End Date:

Job Title: [Help](#) [Reset](#)

Street Address:

City:

State: Zip Code:

Contact Name:

Contact Phone: Extension:

Wages: Per:

*Hours Per Week:

Job Duties:

Received Rapid Response Services:

Last Date Received Rapid Response Services:

*NAICS Code: Search

Description:
Declining:

*O*Net(SOC): Search

Description:

* Green Job?:

Low Growth?:

Show All

Save Cancel

New Employment

Edit Job

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Save Cancel

***Employer Name:** Metraflex Compnay Inc

***Employment Status:** Entered Employment

***Start Date:** 02/20/2019 **End Date:**

Job Title: Machinist

Street Address: 2323 W. Hubbard St

City: Chicago

State: Illinois **Zip Code:** 60613

Contact Name: Jim Smith

Contact Phone: (847)738-2312 **Extension:**

Wages: \$15.00 **Per:** Hour

***Hours Per Week:** 40.0

Job Duties:

Received Rapid Response Services:

Last Date Received Rapid Response Services:

***NAICS Code:** 3329

Description: Other Fabricated Metal Product Manufacturing

Declining: N

***O*Net(SOC):** 514032

Description: Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic

***Green Job?:** No

Low Growth?: Y

Show All

Save Cancel

Employment at Exit

List Work History

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

1 found Page 1 of 1

| | Employer Name | Employment Dates | Dislocation Job? |
|-------------------------------------|---------------------------------------|------------------|------------------------------------|
| <input type="button" value="Pick"/> | Metraflex Compnay Inc | 02/20/2019 - | <input type="button" value="Rec"/> |

Page 1 of 1

Pick Job

Informational Message:
Please click Save to confirm your changes.

Employment at Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date:

School Status at Exit:

| | | | |
|---|----------|------------|---------|
| <p>Employer Name: Metraflex Compnay Inc</p> <p>Employment Start: 02/20/2019</p> <p>Employment End:</p> <p>Contact Name: Jim Smith</p> <p>Contact Phone: (847)738-2312</p> <p>O*Net: 514032 - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic</p> <p>Non Traditional:</p> | Pick Job | Remove Job | Details |
|---|----------|------------|---------|

Source Employed:

Job Type:

***Related to Training?**

Determination Method:

- Comparison of the Occupation codes between training activity and job
- Compared industry of employment with the Occupation of training using an appropriate crosswalk
- Other appropriate method

Source of Employment

Employment at Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date:

School Status at Exit:

| | | | |
|---|-----------------|-------------------|----------------|
| <p>Employer Name: Metraflex Company Inc</p> <p>Employment Start: 02/20/2019</p> <p>Employment End:</p> <p>Contact Name: Jim Smith</p> <p>Contact Phone: (847)738-2312</p> <p>O*Net: 514032 - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic</p> <p>Non Traditional:</p> | <p>Pick Job</p> | <p>Remove Job</p> | <p>Details</p> |
|---|-----------------|-------------------|----------------|

Source Employed:

Job Type:

***Related to Training?**

Determination Method:

Comparison of the Occupation codes between training activity and job

Compared industry of employment with the Occupation of training using an appropriate crosswalk

Other appropriate method

Save Cancel

Job Type

Employment at Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date:

School Status at Exit:

| | |
|---|--|
| <p>Employer Name: Metraflex Compnay Inc</p> <p>Employment Start: 02/20/2019</p> <p>Employment End:</p> <p>Contact Name: Jim Smith</p> <p>Contact Phone: (847)738-2312</p> <p>O*Net: 514032 - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic</p> <p>Non Traditional:</p> | <p>Pick Job</p> <p>Remove Job</p> <p>Details</p> |
|---|--|

| | |
|--|--|
| Source Employed: | |
| Job Type: | Covered Under UI |
| *Related to Training? Determination Method: | <ul style="list-style-type: none"> Federal Civilian Federal Contractor Military Not Covered/Agricultural Not Covered/Domestics Not Covered/Family Business Employment Not Covered/Insurance Agents Not Covered/Local Government Employees Not Covered/Non-Profit Religious Institution Not Covered/Other Excluded Employment Not Covered/Self Employed or Independent Contractor Not Covered/Student Interns/Nurses Railroad Employees Real Estate Salespersons U.S. Postal Service |

Employment Related to Training

Employment at Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date:

School Status at Exit:

| | |
|---|--|
| <p>Employer Name: Metraflex Company Inc</p> <p>Employment Start: 02/20/2019</p> <p>Employment End:</p> <p>Contact Name: Jim Smith</p> <p>Contact Phone: (847)738-2312</p> <p>O*Net: 514032 - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic</p> <p>Non Traditional:</p> | <input type="button" value="Pick Job"/> <input type="button" value="Remove Job"/> <input type="button" value="Details"/> |
|---|--|

Source Employed:

Job Type:

*Related to Training? Determination Method:

- Cannot be determined
- Did not attend training
- No
- Training did not impart job-specific skills
- Yes

Other appropriate method

between training activity and job
with the Occupation of training using an

Determination Method

Employment at Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date:

School Status at Exit:

| | |
|---|--|
| <p>Employer Name: Metraflex Compnay Inc</p> <p>Employment Start: 02/20/2019</p> <p>Employment End:</p> <p>Contact Name: Jim Smith</p> <p>Contact Phone: (847)738-2312</p> <p>O*Net: 514032 - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic</p> <p>Non Traditional:</p> | <input type="button" value="Pick Job"/> <input type="button" value="Remove Job"/> <input type="button" value="Details"/> |
|---|--|

Source Employed:

Job Type:

*Related to Training?

- Determination Method:
- Comparison of the Occupation codes between training activity and job
 - Compared industry of employment with the Occupation of training using an appropriate crosswalk
 - Other appropriate method

Pick Credentials

Exit Control Panel

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

[Return](#)

| | | | |
|---|--------------------------|--------------------|---|
| GENERAL | | | Update |
| Exit Date: NOT EXITED | | | |
| <u>Title</u> | <u>Registration Date</u> | <u>Exit Reason</u> | Add Rec |
| 1A | 01/02/2019 | | |
| CREDENTIALS | | | Update |
| Enter Credentials Attained | | | |
| EMPLOYMENT AT EXIT | | | Update |
| <p>Employer Name: Metraflex Compnay Inc Employment Start: 02/20/2019 Employment End: null Contact Name: Jim Smith Contact Phone: (847)738-2312 Green Job: No - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic Job Title: Machinist Job Duties:</p> | | | |

Pick Credentials

List Credentials

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Add Credential

Return

1 found

Page 1 of 1

| | Credential | Institution | Date Attained | Updated By | Created |
|------|---|-------------|---------------|---------------------------|-----------------------------|
| Pick | Occupational Skills Certificate or Credential | NIMS | 02/20/2019 | Jim Potts | 2019-02-20 13:40:18.479 Rec |

Page 1 of 1

Add Credential

Return

Please fix the following before continuing:

You have chosen to associate the Occupational Skills Certificate or Credential from NIMS to the current application at exit time. Please click on Pick Credential to confirm your changes.

Pick Credential

Cancel

Actual Exit

Exit Control Panel

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

[Return](#)

| | | | |
|---|--|---------------------------|------------------------|
| GENERAL | | | Update |
| Exit Date: NOT EXITED | | | |
| <u>Title</u> 1A | <u>Registration Date</u> 01/02/2019 | <u>Exit Reason</u> | * Rec |
| CREDENTIALS | | | Update |
| <u>Type</u> Occupational Skills Certificate or Credential | <u>Institution</u> NIMS | <u>Date</u> 02/20/2019 | |
| EMPLOYMENT AT EXIT | | | Update |
| Employer Name: Metraflex Compnay Inc Employment Start: 02/20/2019 Employment End: null Contact Name: Jim Smith Contact Phone: (847)738-2312 Green Job: No - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic Job Title: Machinist Job Duties: | | | |



School Status at Exit

General Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019
Exit Date: 02/20/2019

School Status At Exit:

| Title | Registration Date | LWA | Reason |
|-------|-------------------|-----|--|
| 1A | 01/02/2019 | 90 | |
| 1A | 07/02/2018 | 7 | Please contact The Partnership to exit the Career Connect application. |

Save Cancel

General Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019
Exit Date: 02/20/2019

School Status At Exit:

| Title | Registration Date | LWA | Reason |
|-------|-------------------|-----|--|
| 1A | 01/02/2019 | 90 | In-school,Alternative School |
| 1A | 07/02/2018 | | In-school,H.S. or less |
| | | | In-school,Post-H.S. |
| | | | Not attending school or H.S. Dropout |
| | | | Not attending school; within age of compulsory school attendance |
| | | | Not attending school; H.S. graduate |

Exit Reason

General Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date: 02/20/2019

School Status At Exit: ▼

| Title | Registration Date | LWA | Reason |
|-------|-------------------|-----|---|
| 1A | 01/02/2019 | 90 | |
| 1A | 07/02/2018 | 7 | <ul style="list-style-type: none"> Attained Credential/Diploma Cannot Locate Criminal Offender Deceased Entered Unsubsidized Employment Family Care Foster Care Health/Medical Incarcerated Institutionalized LacksTransportation Other, Services Completed Other, Services Not Completed Program Ended Reserve Forces Called to Active Duty Retirement |

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[Career Connect](#) and [Privacy Agreement](#)

Exit Reason

General Exit

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019

Exit Date: 02/20/2019

School Status At Exit: ▾

| Title | Registration Date | LWA | Reason |
|-------|-------------------|-----|--|
| 1A | 01/02/2019 | 90 | <input type="text" value="Entered Unsubsidized Employment"/> ▾ |
| 1A | 07/02/2018 | 7 | Please contact The Partnership to exit the Career Connect application. |

Please fix the following before continuing:

You are about to exit this application. Once the application is exited you will not be able to change the Exit Date. Exit Anyway?

Completed LWIA 90 Exit

Exit Control Panel

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019 Exit Date:02/20/2019

[Return](#)

| | | | |
|---|---|---------------------------------|------------------------|
| GENERAL | | | Update |
| Exit Date: 02/20/2019 | | | |
| School Status At Exit: Not attending school; H.S. graduate | | | |
| <u>Title</u> | <u>Registration Date</u> | <u>Exit Reason</u> | Rec |
| 1A | 01/02/2019 | Entered Unsubsidized Employment | |
| CREDENTIALS | | | Update |
| | <u>Type</u> | <u>Institution</u> | <u>Date</u> |
| | Occupational Skills Certificate or Credential | NIMS | 02/20/2019 |
| EMPLOYMENT AT EXIT | | | Update |
| Employer Name: Metraflex Compnay Inc | | | |
| Employment Start: 02/20/2019 | | | |
| Employment End: null | | | |
| Contact Name: Jim Smith | | | |
| Contact Phone: (847)738-2312 | | | |
| Green Job: No - Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic | | | |
| Job Title: Machinist | | | |
| Job Duties: | | | |

Legislatively Mandated Follow-up Services

- Training and Employment Guidance Letter (TEGL) 19-16 - dated March 1, 2017 requires that follow-up services for adults and dislocated worker participants who are placed in **unsubsidized employment, for up to 12 months after the first date of employment.**
- All Youth are required to have 12 months of follow-up services after exit.

Recording Follow-up in IWDS

Add Required Activity Information

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019 Exit Date:02/20/2019

Created By: Jim Potts

Title: 1A

Service Level: Career Services

Activity: Follow-up Services

*Grant: 17634057-DCEO - SYMBOL

Provider: [RR 16654121-90 Symbol Training Institute](#) * Search Providers

Start Date: 02/21/2019

End Date:

*Current Status: Open

*Supports Bridge Program?: No

Comments:

Additional Info

< Back

Save

Cancel

Recording Follow-up in IWDS

- The IWDS service of follow-up stays open and the actual recording the action of follow-up will be completed by recording a case note.
- See the next slide for an example case note.

Follow-up Does Not Extend Enrollment

Services

[David Howard](#) [Application Summary](#)

SSN: 1441 App LWA:90 App Date:01/02/2019 Exit Date:02/20/2019

5 found Page 1 of 1

| Start Date | End Date | Service Provided | Status | Created By |
|------------|------------|--|-----------------------|---------------------------|
| 02/21/2019 | | Follow-up Services - 1A | Open | Jim Potts |
| 01/07/2019 | 02/20/2019 | Occupational Classroom Training - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 01/02/2019 | Development of an IEP - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 01/02/2019 | Career Planning - 1A | Successful Completion | Jim Potts |
| 01/02/2019 | 02/08/2019 | Case Management - 1A | Successful Completion | Jim Potts |

Page 1 of 1

Recording Follow-up in IWDS

- The actual IWDS service of follow-up stays open and you would record the action of follow-up will be documented by recording case notes.
- An exited clients employment is followed for WIOA performance outcomes through four quarters post exit.
- At a minimum, each quarter the client should have follow-up action recorded on your client who was exited as “Entered Employment”.

Case Note from F/U Service

Add Case Note

[David Howard](#) [Application Summary](#)

Staff Name: [Jim Potts](#)

| | |
|---|--|
| *Contact Date: | <input type="text" value="2-21-2019"/> |
| Program: | <input type="text" value="WIOA"/> |
| *Note Category: | <input type="text" value="Post-Exit Follow-Up"/> |
| *Confidential: | <input type="text" value="No"/> |
| *Note Subject: | <input type="text" value="Began Employment at Metraflex"/> |
| *Case Note: | <input type="text" value="David completed his CNC training yesterday, 2-20-19 and had been in communication with Metraflex Inc. who had stated all along that when he graduated they had a job waiting from him. He"/> |
| <input type="button" value="Save, Add Another"/> <input type="button" value="Save and Return"/> <input type="button" value="Cancel"/> | |

Conducting Follow-up

- This “example” clients last date of service was on 2-20-19 and the individual also began their employment on that same date.
- So his follow-up service began being recorded on 2-21-19.

Exiting a Co-enrolled Client in CC

- Dena will demonstrate this step now in test CC.
- Once the LWIA 7 Closure/Exit is completed and transfers to IWDS, check to make sure that LWIA 7 and LWIA 90 Exit Dates match.
- If not, email helpdesk@workforceboard.org and The Partnership will make sure the exit dates are corrected to match.

Co-enrollment Reports

- IWDS Co-enrollment report is forthcoming
- In Career Connect, can run a “Services Provided Individual” report on the “Co-enrollment” service

Overview

- This power point demonstrated the steps required for creating an application in IWDS under LWIA 90, for a client who was a current WIOA Registrant under LWIA 7.
- Additionally, this power point discussed the importance of coordinating the plan for serving individuals that are co-enrolled under State-wide Grants and traditional LWIA 7 formula grants.
- This power point also demonstrated enrollment in services, closing services, recording credentials earned while in services, and documenting a measurable skill gain on a client.
- Lastly this power point demonstrated exiting a client who had completed services and enrolling the client in Follow-up services.

Questions?