Login to IWDS System in Training Environment

1.   Click on the Internet Explorer browser shortcut

2.   Use this URL:

      a. http://dceot.cmcf.state.il.us/mhdsm05x/staffhome.html

3.   Click on continue

4.   Change toolbars to remove Standard and Address toolbars. (Refer to p. 1-25 in your binder.)

5.   Change various settings for the browser. (Refer to pp. 1-19 – 1-22 in your binder.)

6.   Enter the following information for userid:

      a. Positions: _1_ _2_ 3-6 = user

          1 – Where first position is the course alpha character – given from the instructor (value will be a, b, c, d, e, f, g, h, I or j)

          2 – Where second position is the alpha character assigned for you in the class – given from the instructor (values will range from a – z)

          3 – 6 – user

          Example: Class a, User a = aauser
                            Class a, User d = aduser
                            Class b, User b = bbuser

7.   Enter the following password:

      a. Positions: _1_ 2-8 = student

          1 – Where first position is the course alpha character given from the instructor (values will range from a – j)

          2 – 8 – student

          Example: Class a, User a = aauser, password is astudent
                            Class a, User c = acuser, password is astudent
                            Class b, User a = bauser, password is bstudent

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8.   Click on Next

9.   For training purposes, each user has been set up as a Case Manager with various authorizations as listed below

☐ Case Management View Only	☐ Case Manager Supervisor	☐ Federal Reports	☑ IDES Case Manager
☐ JTD System Administrator	☐ Local System Administrator	☑ Overview Reports	☑ Participant Reports
☐ Performance Goal Manager	☑ Performance Management Reports	☑ Performance Management View Only	☐ Security Reports
☑ Summary Reports	☑ Training And Services Reports	☑ Wage Reports	☑ WIA Youth Certification (Not 5%)
☑ WIA 5% Youth Certification	☑ WIA/WTW Case Manager	☑ WIA/WTW Non-Youth Certification	☑ WIA/WTW Obligation Approval

10.   You may or may not have the same authorizations when you return to your LWA

11.   If so, enter new password in appropriate locations and click on Next

12.   You are now in your Staff Menu

13.   Create a new password

Naming standards for Customers:

Each student will be creating 3 or more customers during this training. Although it would be permissible to create customers with the same names, it will be less confusing if customer names and social security numbers are unique. We are using a training database and the customers that you add will be deleted following the class.

Customer Names

Use the following convention when creating customer names and social security numbers:

Customer first name--------------------Use a name of your choice (your name, your nickname, name of a famous person, your pet's name, etc)

Customer last name--------------------Same as above for first name, but also add either 1A, 1Y, or 1D, depending on the program title that we are creating

Some Examples: <u>First Name</u>   <u>Last Name/Title</u>
                    Elvis   Presley 1A
                    Fido   Dogg 1D
                    Elmer   Fudd 1Y

Social Security Number

Use a portion of your business phone number (to make it unique) for each customer that you create, for example:

<u>Your Business Phone Number</u>	<u>Training Social Security Number</u>
(318) 54**3-7500** ext **3421**	375-00-3421
(3**09**) **287-8765**	092-87-8765

Change 1 digit in the training social security number when adding additional customers (1D and 1Y). If the social security number that you choose is the same as another customer's, the system will still work, however it could be somewhat confusing.

Add a Customer with minimal information; Enter Case Notes and Enroll them in Universal Services

This lab will add a customer with minimal information (contact information, additional contacts, and private information). The lab will provide hands-on training to introduce the IWDS system. Follow the process outlined in the chapter to enter information. Add a suffix to last name (**1A)** for this customer.

1) Check for an existing Customer using "Search Customers"
    (search for a customer with the same name as the one you are creating)

2) Enter basic customer information. (Refer to pp. 2-23 – 2-32 in your binder.)

    Customer Name   _____
        Birth Date (10/01/1955)
    Contact information
        Street Address   (1212 Walker Apartments)
        City   (Charleston)
        State   (Illinois)
        Zip Code   (61920)
        County   (Coles)
        Home Phone   (217)-348-5309
    Additional contact information
        Last name – First name   (McGowan Brindley)
        Relationship   (family friend)
        Street Address   (1217 Walker Avenue)
        City   (Charleston)
        State   (Illinois)
        Zip Code   (61920)
        Home Phone   (217) 348-4000)
    Private information
        SSN   (**above**)
        Hispanic   (**no**)
        Race/Ethnic.   (**Black and Asian**)
        Gender   (**male**)
        USA work authorization   (**yes**)
        Selective Service Authorization   (**Not Applicable**)
        Disabled   (**no**)

3) Enter Non-Confidential case notes describing initial discussions with them

4) Record job club and orientation universal services for a customer

Log Off

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