

WIOAB 01-21

DATE: July 21, 2021
TO: All WIOA Subrecipients
FROM: Danilo Cabrera *Danilo Cabrera*
Program Operations Manager
SUBJECT: Participant Records transfer to IdahoWorks

Thank you all for working hard to get your documents and case notes transferred from Participant Records into *IdahoWorks*.

We are receiving reports of random/sporadic instances where career planners receive a “Request Denied” error message when trying to paste and save their previous notes into an Enrollment Note. We have been troubleshooting the issue with AJL and the sudden, large and increased bursts of this activity are creating the error.

In the interest of time and workload, we are issuing this new guidance.

From this point forward, career planners can instead:

- Convert the entire case note document (notes through 06/30/21 **only**) into PDF format (see below). Notes after this time should be entered individually into *IdahoWorks*.
- Upload that PDF into the Document Uploader
- Select the *Case Notes (copies)* category from the Document Item List
- Enter a new note in the Enrollment Note page that the document (Case Notes, ISS/Case Note, etc.) was uploaded and can be found in the Document Uploader

Document Uploader

The following file types are accepted: PDF, JPG, or PNG. The file may be no larger than 10 MB.

Document Name (required)
ISS and Case Notes 01/01/21-06/30/21.pdf

File Description
WIOA 130
1000 character maximum

Document Item (required)
Case Notes (copies)

Item Scope (required)
 Universal
 Enrollment

Document Type (required)
 Supporting
 Enrollment

Enrollment: Adult: July 12, 2021 (Open)

Data Elements to be Verified
 Case File Documentation

If you have already pasted notes into the Enrollment Notes section, please check a few of the records to ensure all the notes were pasted into the Enrollment Notes section. If you find they did not, you may follow the procedure above and transfer the entire document into the Document Uploader.

CONVERT TO PDF INSTRUCTIONS

1. Retrieve your Microsoft Word Document
2. Click *File* in the ribbon
3. Select *Save as Adobe PDF* (this will keep any web links/URLs active)
4. Select the location where you want the PDF saved
5. Name the PDF using the standard convention (last name, last four of SSN, document name).

The recently posted FAQ will be updated with this new guidance.
Please direct questions to the WIOA/TAA mailbox.