

Purpose: To provide guidance on the components that partners should include when working with a customer to create an Individualized Services, Training, and Employment Plan (ISTEP).

Category	Exceed standards	Meets standards	Below standards	Customer Support Center Related Tools
Quality of Information		<ul style="list-style-type: none"> Information is accurate and current. Free from or minimal typos. Uses language that all partners and customers understand. If acronyms are used, spell them out the first time or use a legend to define. 	Does not meet all “meets standards” criteria.	
Contact information	Meets standards and includes: <ul style="list-style-type: none"> 2 or more additional contacts 	Initial Plan <ul style="list-style-type: none"> Don’t include full Social Security Number (SSN) Customers legal name and the name they go by/use Address Customer phone/text Social media for customer contact 1 additional contact person Case worker/Career Planner Contact Information Update Plan Review and update contact information as needed.	Does not meet all “meets standards” criteria.	Customer enters initial information into the online Illinois workNet application. Customer can update their personal information in their profile. Partner can identify the partner contacts on the customer’s Progress Page (Partner contact Info). Partners can add contact information in case notes and use the message feature to alert other partners that contact information has changed.
Assessment	Meets standards and includes one or more of the following: <ul style="list-style-type: none"> Assess Aptitudes 	Initial Plan <ul style="list-style-type: none"> Assess Barriers Assess Basic Skills for Adult Education/English As A Second Language Assess Employment/ Education History 	Does not meet all “meets standards” criteria.	Customer enters initial information into the application and completes the skills and interest assessments in Illinois workNet.

Category	Exceed standards	Meets standards	Below standards	Customer Support Center Related Tools
	<ul style="list-style-type: none"> Assess Everyday Life Skills Assess to determine if customer meets specific employer job requirements 	<ul style="list-style-type: none"> Assess Family/ Support System Assess Job/ Employability Skills Assess Skills and Interests <p>Update Plan</p> <ul style="list-style-type: none"> Reassess for basic skills for measurable skill gain Reassess current barriers Reassess job/employability skills 		<p>Partner completes/updates the barriers assessment, and employment/education history on the customer’s Progress page.</p> <p>Partners can review saved Optimal Resume items (i.e., assessments, resumes, cover letter, interview practice).</p> <p>Partner can update the “Other Assessment Information” on customer’s assessments tab.</p>
Goals	<p>Meets standards and includes one or more of the following:</p> <ul style="list-style-type: none"> Identify 1 year (short term) goal benchmarks Identify long term goal benchmarks 	<p>Initial Plan</p> <ul style="list-style-type: none"> Goals identify barrier to be addressed, education/training, occupations and related stackable credentials that can be earned to advance the customer through their career pathway. Identify immediate goals (short term) and benchmarks (i.e., state outcomes that are realistic, measureable, and attainable.) <ul style="list-style-type: none"> What is the biggest challenge to overcome right now? Where do you see yourself in 90 days if this barrier could be overcome? Identify 1-year (short term) goals Identify long term goals <ul style="list-style-type: none"> Long-term – 5 years Long-term – 10 years 	<p>Does not meet all “meets standards” criteria.</p>	<p>Customer enters initial information into the application.</p> <p>Partner completes/updates the goals on the customer’s Progress page.</p>

Category	Exceed standards	Meets standards	Below standards	Customer Support Center Related Tools
		<p>Update Plan Revisit goals to identify new immediate goals, 1 year goals, and long term goals as needed. (e.g., quarterly review)</p>		
Customer Centered Holistic Services	<p>Meets standards and includes one or more of the following:</p> <ul style="list-style-type: none"> • Use case notes message feature to remind them of upcoming deadlines. • Document two-way communication in case notes. 	<p>Initial Plan</p> <ul style="list-style-type: none"> • Initial plan is developed with the customer. • A copy of the plan is provided to the customer. The customer can receive/access an updated plan upon request. • Service can be provided by an in-house service, by a partner, or self-accessed. Each service should identify the provider of the service, planned start date, planned end date and projected number of weekly hours to dedicate to the service. • Identify supportive services based on goals and initial assessments such as a Family/ Support System and barriers. Each barrier show be addressed. • Identify training services based on goals and initial assessments such as basic skills, employment/education history, job/employability skills, and skills and interests. • Identify career/job search services based on goals and initial assessments such as basic skills, employment/education history, job/employability skills, skills and interests, and employers specific expectations and ensure customer services address those needs 	<p>Does not meet all “meets standards” criteria.</p>	<p>Partner completes/updates the services on the customer’s Progress page.</p> <p>Partners can use the case note message feature to send messages to the customer and/or partners.</p> <p>Partners can use the case note to document two-way communication and other service related information.</p> <p>Partners can review saved Optimal Resume items (i.e., assessments, resumes, cover letter, interview practice).</p> <p><i>Upcoming enhancements:</i> Print customer copy button will print the plan with signature lines as well as send the customer a notification that their plan is available.</p>

Category	Exceed standards	Meets standards	Below standards	Customer Support Center Related Tools
		<p>Updating Plan Document the following for each service identified in the plan:</p> <ul style="list-style-type: none"> • Service Type – i.e. Assessment, Career Planning, Education • Service – Name of service • Status – Not Started, Open, Complete, Did not Complete • Start Date • Due Date • Completed Date • Provider • Cost • Credentials Earned 		
Timeliness	<p>Initial Plan Developed in less than 5 days of completing assessments.</p>	<p>Initial Plan Developed within 5 days of completing assessments.</p> <p>Update Plan Review plan every 30 Days</p>	<p>Does not meet all “meets standards” criteria.</p>	<p>Use dashboard to: Identify those who do not have an initial plan.</p> <ul style="list-style-type: none"> - Youth Career pathway dashboard Customer Services section in the line “Customers Who Do Not Have Identified Planned Services” <p>Identify plans that need a 30-day review</p> <ul style="list-style-type: none"> - Youth Career pathway dashboard section “Progress Page Update”