

Contents

Overview	1
Purpose:	1
Who Enters/Maintains Data	1
Access Customer Progress Page	2
How is the Career Plan organized?	2
Career Plan Sections	2
Overview	2
Complete Assessments	4
Set Goals	4
Build a Plan.....	5
Service/Step Level Information (Not Worksite Placements)	6
Service/Step Level Information (Worksite Placements)	6
Sync Services with IWDS – Illinois Workforce Development System	7
Sync a Service in the Career Plan	8
Sync a Service that is not in the Career Plan.....	8

Overview

Purpose:

Career Plan is a tool that case workers/career navigators can use with their customers to:

- Review assessment results
- Create goals based on assessment results
- Identify steps/services needed to achieve those goals
- Document current status of the plan
- Flag the customer’s account when intervention is needed

Highlights:

- Customer information, submitted during the application process, is used to populate the Career Plan.
- The career navigator reviews the information and identifies recommended next steps that include start/end dates, status, notes, associate cost and earned credentials (when applicable upon successful completion of the credential).
- The career navigator adds recommended steps/services by selecting them from a list.

Who Enters/Maintains Data

Only staff and customers, whom have been given access to the program, can view the Career Plan.

- **Statewide User Role** – Statewide staff can view and edit Career Plans for all customers.

- **Career Planner/Case Worker Role** – Staff can view and edit Career Plans for customers in their region or office.
- **Customer Role** – Customers can access their information from their program tools located in My Dashboard (coming next).

Access Customer Progress Page

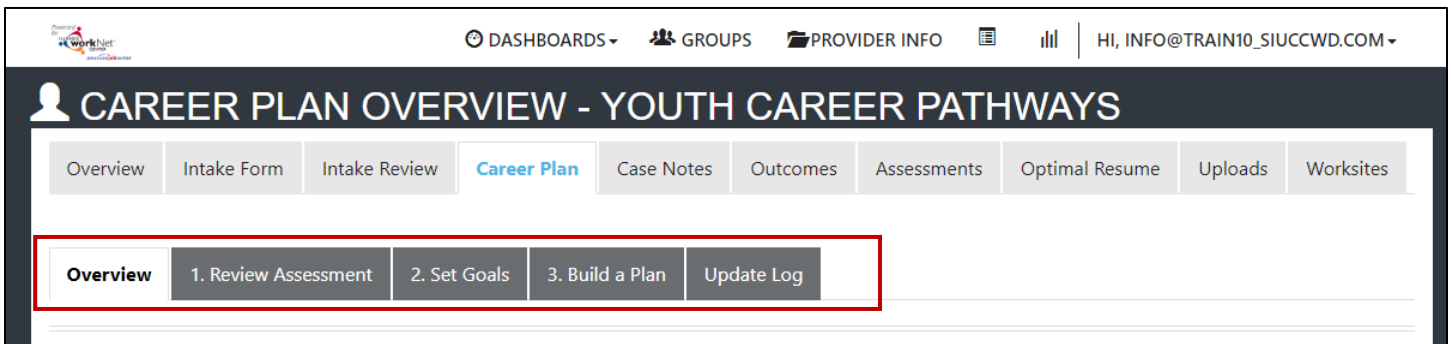
1. Log into www.illinoisworknet.com.
2. Select **My Dashboard**.
3. Select **Partner Tools**.
4. Select **Customer Support Center**.
5. Select **Groups** in the top menu.
6. Select **Youth Career Pathways Partner Tools**.
7. Select the **customer's name** to access their information.
8. Select the **Career Plan** tab.

Shortcut Tip:

Go to www.illinoisworknet.com/ycppartners.
Select the link for **Youth Career Pathway Partner Tools Dashboard**.

How is the Career Plan organized?

The Main Career Plan Navigation



Overview provides a summary view of assessments, career goals, accomplishments, and steps required to achieve goals.

1. **Review Assessments** provides assessment results that are saved in Illinois workNet and an area to write a summary of the assessment results.
2. **Set Goals** provides an area to identify goals and organize them by short/long term, type, and status.
3. **Build a Plan** provides system generated recommended services/steps and can be added to the plan.
4. **Update Log** provides a log of Career Plan updates and uploads for customer Career Plan agreements.

Career Plan Sections

Overview

Case Notes allow career planners/partners to document changes, updates, and other notes.

Profile provides a:

- Summary of customer information
- Message button

Customer Goal/Plan Agreement section provides evidence of the customer participating in the development of their Career Plan. At this time, use the **Print Customer Copy** button and ask the customer to sign the bottom of this document then upload the agreement under the Upload tab.

OVERVIEW
CASE NOTES (0) ▲

Print Customer Copy
Export IWDS Crosswalk

Profile: Fast Eddie

Email feddie@noemail123.com

User Name feddie123

Last 4 SSN 4562

See All

Sync With IWDS

Last Sync: 9/13/2018 2:02 AM

Reset Password Send Message

Latest Customer Goals/Plan Agreement: (Status: *Unknown*)

Select plan status

Save Status (Send Request)

ASSESSMENTS

Career Cluster Inventory
Not Complete

Employment 101 - Pre
Not Complete

Employment 101 - Post
Not Complete

NOCTI
Not Complete

[See More](#)

DESIRED CAREER PATH

Career Pathway Choice
Agriculture, Food, and Natural Resources

Occupation 1
None

Occupation 2
None

Wage Goal (Per Hour)
None

[See More](#)

ACCOMPLISHMENTS

Earned Credentials: 0

Completed Goals: 0

Completed Services: 3

INDIVIDUALIZED, SERVICES, TRAINING AND EMPLOYMENT PLAN (ISTEP)

Goal	Related Steps	Category	Earliest Start Date	Latest Due Date	Status
Increase reading and math level.	Show Next Steps	Education/Training Plan	8/27/2018	12/28/2018	On Track
Earn forklift certificate and get a job in a warehouse.	Hide Next Steps	Education/Training Plan	9/3/2018	9/29/2018	On Track
	Start permanent employment as part of this program.		9/4/2018		Started (Open)
	Receive job retention services.		9/3/2018	9/29/2018	Started/Open

Assessments view provides a high level of completed assessments. Select **See More** to go to the Assessment page.

Desired Career Path is part of the Employment Goal assessment; this information is able to be updated at any time. Select **See More** to go directly to the Employment Goal assessment section.

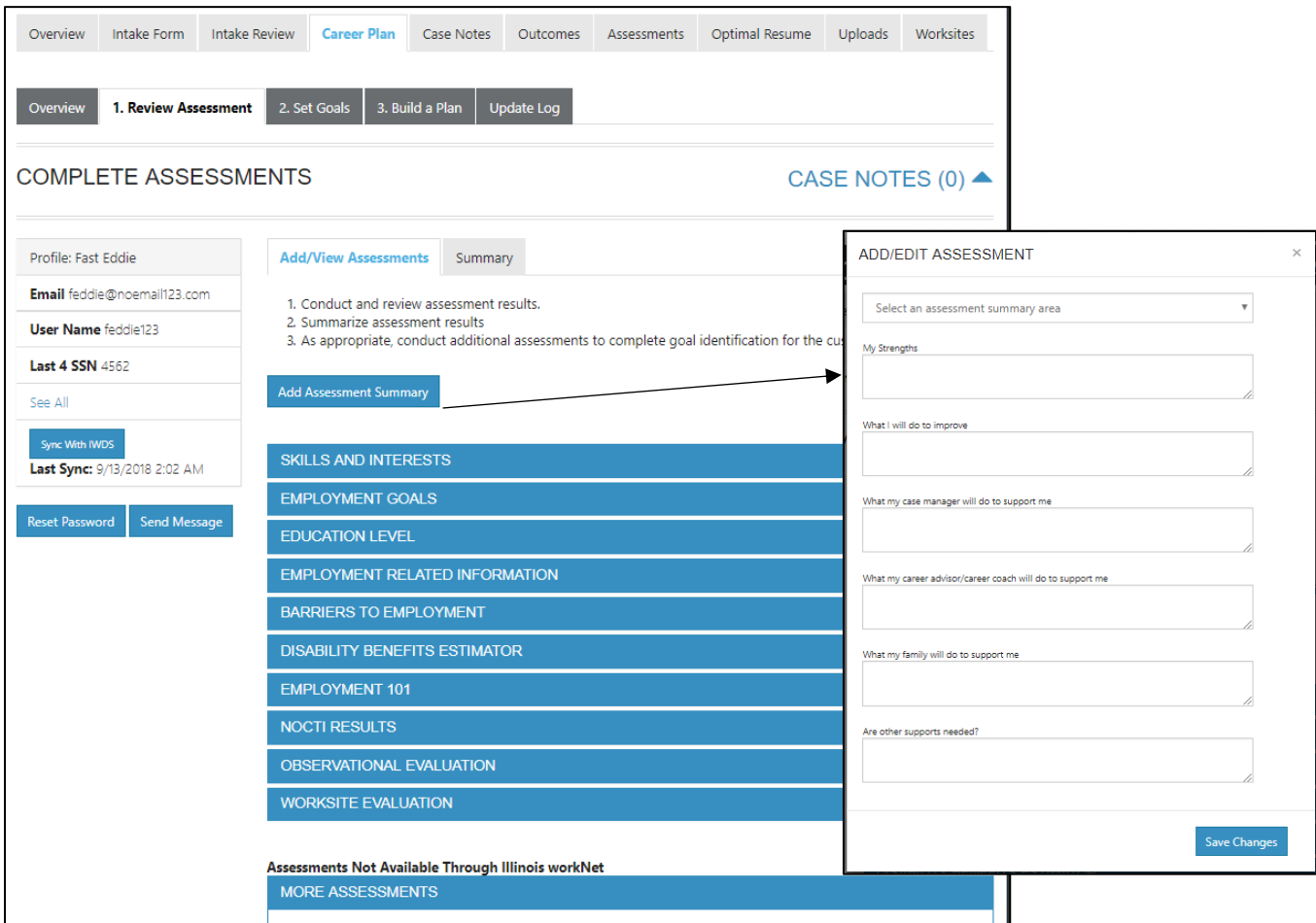
Accomplishments provides a quick count of earned credentials, completed goals, and completed services that link to a list of those items.

The **Career Plan** section is organized by goals and includes a list of steps/services associated with each goal. The start and end dates for the goals are automatically generated by the steps/service of that goal. Goal Status is set by the career planner and is used to identify whether the plan is not started, on track, off track, or complete.

Complete Assessments

It is important to complete assessments to identify customer skills, interests, goals, and barriers. Some of this information is collected when the customer completes the online application (Initial Assessment); this information is saved under the **Career Plan Complete Assessment** and **View Results** section.

1. Go through each of the assessment sections.
2. Add an **Assessment Summary**. Saved assessment summaries are available in the Assessment History link.



The screenshot displays the 'Career Plan' interface. At the top, there are navigation tabs: Overview, Intake Form, Intake Review, **Career Plan**, Case Notes, Outcomes, Assessments, Optimal Resume, Uploads, and Worksites. Below these are sub-tabs: Overview, **1. Review Assessment**, 2. Set Goals, 3. Build a Plan, and Update Log.

The main content area is titled 'COMPLETE ASSESSMENTS' and includes a 'CASE NOTES (0)' link. On the left, a profile card for 'Fast Eddie' shows contact information and a 'Sync With IWDS' button. The central area has tabs for 'Add/View Assessments' and 'Summary'. A list of assessment categories is shown, including 'SKILLS AND INTERESTS', 'EMPLOYMENT GOALS', 'EDUCATION LEVEL', 'EMPLOYMENT RELATED INFORMATION', 'BARRIERS TO EMPLOYMENT', 'DISABILITY BENEFITS ESTIMATOR', 'EMPLOYMENT 101', 'NOCTI RESULTS', 'OBSERVATIONAL EVALUATION', and 'WORKSITE EVALUATION'. A blue button 'Add Assessment Summary' is highlighted with an arrow pointing to a modal window.

The 'ADD/EDIT ASSESSMENT' modal window contains a dropdown menu to 'Select an assessment summary area'. It features several text input fields: 'My Strengths', 'What I will do to improve', 'What my case manager will do to support me', 'What my career advisor/career coach will do to support me', 'What my family will do to support me', and 'Are other supports needed?'. A 'Save Changes' button is located at the bottom right of the modal.

Set Goals

Goals should be written so they address barriers, employment goals, education/training, and related stackable credentials that can be earned to advance the customer through their career pathway. Goals should be realistic, measurable, and attainable.

Use completed assessments as a resource to discuss and develop goals with your customer. The customer will need to agree to the overall initial plan. If customer goals are added or marked as off track, the customer will need to agree to this update.

1. Select the **Set Goals** tab and **Add Goal Statement**.
2. Enter a **Goal Statement** that is no more than 144 characters.
3. Select a **category** (Support Services, Career Plan, Education/Training Plan).
4. Identify if the goal is a **short-term or long-term** goal.

5. Set **Goal Status**.

- Not Started = The default status setting. Career planners should update this when the customer has started working towards the goal.
- On Track = The customer is continuing to progress through the steps in this section of the plan at an acceptable rate. Once a service is marked as started, the status will automatically update on track. This can be manually updated any time.
- Off Track = The customer is not progressing through the steps in this section of the plan at an acceptable rate. This status is set by the career planner. *(Coming soon enhancement – A notification will be sent to the customer informing them of their plan is now set to off track and the career planner would like to help them get back on track.)*
- Complete = The career planner has verified the customer has completed this section of the plan; this status is only set by the career planner.

Add Goal Statement					
Goal Statement	Category	Short/Long Term	Status	Plan Services	
Get support services lined up to help ensure workplace success.	Support Services	Short Term Goal	On Track	Transportation assistance	Edit
Gain permanent employment with an employer in the Health Science industry.	Career Plan	Short Term Goal	Not Started	Get permanent employment as part of this program., Explore jobs, required skill/credentials, and wage information., Prepare your resume.	Edit
Get training/certified as a care giver.	Education/Training Plan	Long Term Goal	Not Started		Edit



Build a Plan

Start adding planned services and steps for the customer to reach their goals.

1. Select steps to add from a list by clicking on **System Generated Service Recommendations** to identify the planned services (for step 2). Once a step has been added to the planned service, a checkmark will show it has been added. You can add a service more than once.

SYSTEM GENERATED SERVICE RECOMMENDATIONS				
Filter By Type	Filter By Category	Search: <input type="text"/>		
Type	Category	Service	Tags	
Self-Service	Training	Build your portfolio.	Building Futures, Youth Career Pathways	Add
Self-Service	Employment	Be part of a job club.	Building Futures, Youth Career Pathways	Add
Self-Service	Employment	Build your network of people that can help you find a job.	Building Futures, Youth Career Pathways	Add
<input checked="" type="checkbox"/> Staff Assisted	Training	Attend adult education and literacy classes.	Building Futures, Youth Career Pathways	Add

2. **Edit the Planned Services** to identify related goals, what barriers the step addresses, status of step, service provider, dollar value of service, and more. Select the edit icon to edit the service.

PLANNED SERVICES				
Filter By Status	Filter By Goal	Search: <input type="text"/>		
Step/Service	Note	Status	Goal	Other Items
Attend adult education and literacy classes. ✎ ✖ ⓘ		Started/Open Start Date: 8/27/2018		

Service/Step Level Information (Not Worksite Placements)

Status

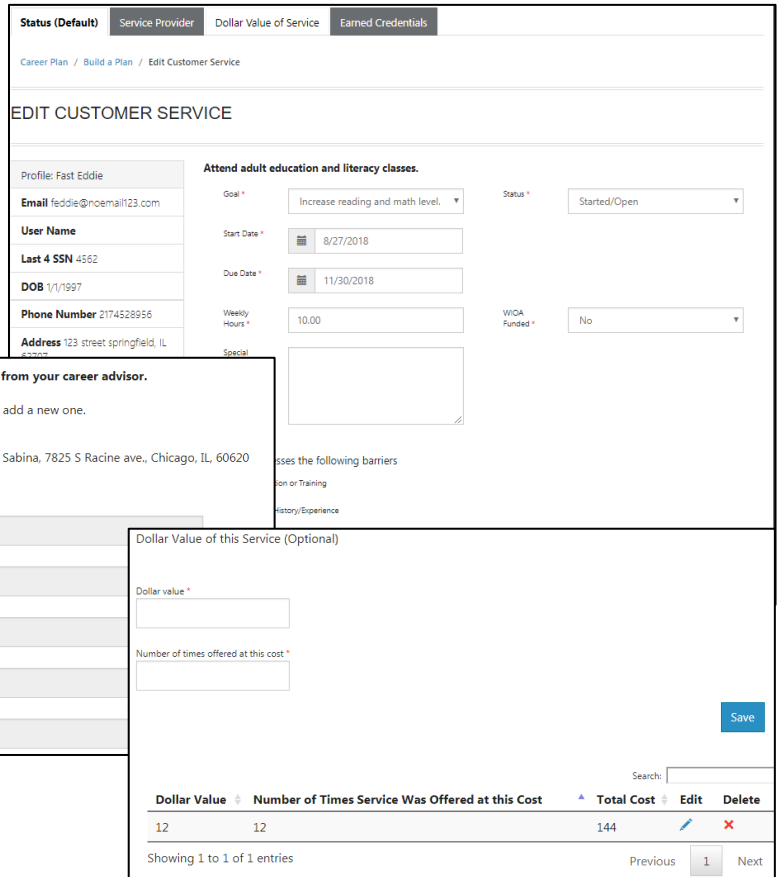
All services include related goals, status, start date, weekly hours, WIOA funded (answer no for this project), notes, and related barriers. If the status is complete, a completion date is required.

Service Provider

Identify who is providing the service. The grantee will be the default provider. If the grantee is not providing the service, enter the provider information.

Dollar Value (Not Required)

Enter the dollar amount related to the service. For example, if a transportation bus pass or gas card was provided, you can add it to this service.



Dollar Value	Number of Times Service Was Offered at this Cost	Total Cost	Edit	Delete
12	12	144		

Get career/job planning guidance from your career advisor.

Pick the initial service provider OR add a new one.

Catholic Bishop of Chicago - St. Sabina, 7825 S Racine ave., Chicago, IL, 60620
 Other provider

Name *

Address *

City *

State *

ZipCode *

Dollar Value of this Service (Optional)

Dollar value *

Number of times offered at this cost *

Service/Step Level Information (Worksite Placements)

Important Notes:

- Before entering Worksite Placements into the Career Plan, make sure all employers and worksites have been identified in the worksite placement tool.
- Add customers to a worksite through their Career Plan, it will also populate the worksite placement tool. You do not need to do it in both places.
- Payroll is uploaded in Worksite Placement for you to enter information for the entire group.

Status

All services include related goals, status, start date, weekly hours, WIOA funded (answer no for this project), notes, and related barriers. This type of service/step also includes worksite placement fields.

To add the customer, select **Add** and enter the following information:

- Minimum Wage for placement based on your region and customer age/circumstance.
- Hourly wage will be prepopulated with information entered with the job. You can change this for each customer. Hourly wage must be equal to or greater than the minimum wage.
 - Enter the subsidized wage.
 - Days in subsidized employment is listed with each placement.
 - Unsubsidized wage will automatically be calculated by subtracting the subsidized wage from the hourly wage.

- Select the **type of position**.
 - Full-time.
 - Part-time
- Select a **Status**.
 - Planned/Not Started
 - Started (Open)
 - On Hold (Inactive)
 - Terminated
- Enter the Start/End Date.
- **Follow-up** is required at 30, 60, 90, 180, and 270 days. The follow-up section will be available and activated once each of the timeframes have been met. When the customer reaches each milestone, review the information for accuracy, update the Subsidized Wage as needed, and select that you have verified employment.

Get permanent employment as part of this program.

Add this customer to a worksite. If you do not have any worksites listed, add the employer/worksite in [worksite placement](#). Once added, they will be available in ISTEP.

Related Goal:

Show entries Search:

	Employer	Worksite	Job	Total Number of Openings
Add	Testing CYEP Employer	Testing CYEP Employer	Business Operations Specialists, All Other	5
Add	Double E	Double E	Computer Operators Level 1	1
Add	Double E	Double E	Computer Programmers	7
Add	Dee's Dogs	Dee's Dogs	Dog Trainer	2
Add	tests	tests	Geological Sample Test Technicians	3

Showing 1 to 5 of 8 entries Previous Next

Job Title: Employer:

Employment Type: Worksite:

Minimum Wage for Placement: Position Type:

Hourly Wage for Placement: Status:

Subsidized Wage or Training Wage Match: Start Date:

Unsubsidized/Employers Wage Match: End Date:

Service Provider

The grantee will be the default provider.

Dollar Value (Not Required)

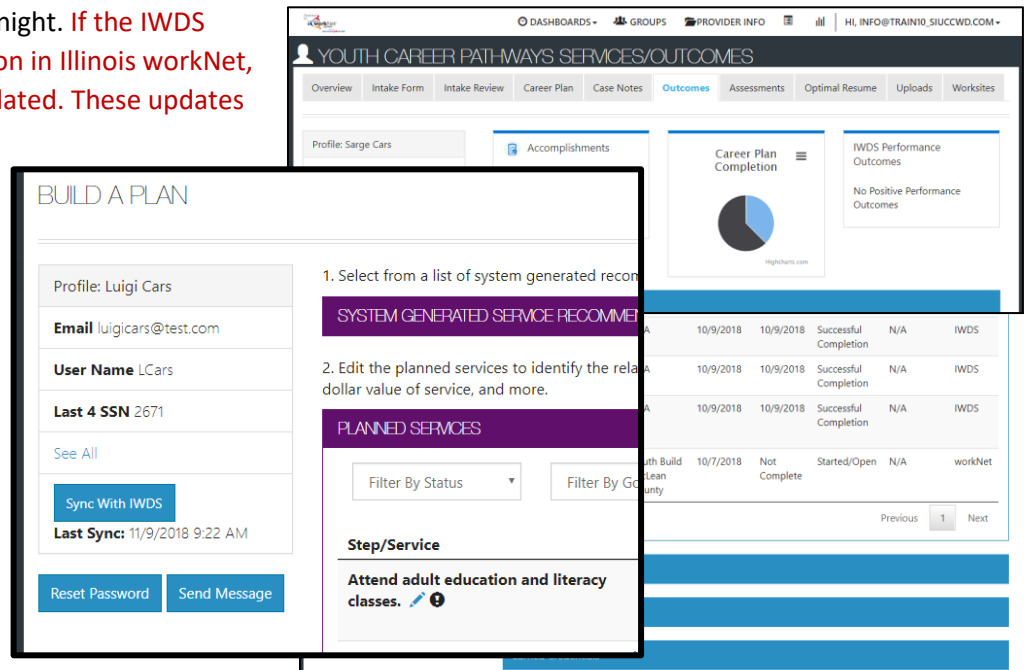
Enter the dollar amount related to the service. Do **not** use this as payroll upload, those cost should be added via the payroll upload. A possible future enhancement may be to pull payroll uploads into this section.

Sync Services with IWDS – Illinois Workforce Development System

Files automatically sync with IWDS each night. **If the IWDS services and start dates match information in Illinois workNet, the Career Plan will automatically be updated. These updates are visible to the customer.**

Any time, a manual sync of information can be performed by clicking the “Sync With IWDS” button under the customer’s profile on any page of the customer’s file.

There are some instances where synced services do not populate the Career Plan since it may cause confusion for the customer. Eligibility Determination, Individual Service Strategy and Follow-up services do not populate the Career Plan. They can be found under the **Outcomes** tab.



BUILD A PLAN

Profile: Luigi Cars
 Email: luigicars@test.com
 User Name: LCars
 Last 4 SSN: 2671
 See All
 Sync With IWDS
 Last Sync: 11/9/2018 9:22 AM
 Reset Password Send Message

1. Select from a list of system generated recommendations.
2. Edit the planned services to identify the relationship, dollar value of service, and more.

SYSTEM GENERATED SERVICE RECOMMENDATIONS

Start Date	End Date	Status	Wage	System
10/9/2018	10/9/2018	Successful Completion	N/A	IWDS
10/9/2018	10/9/2018	Successful Completion	N/A	IWDS
10/9/2018	10/9/2018	Successful Completion	N/A	IWDS

PLANNED SERVICES

Filter By Status: Filter By Group:

Step/Service

Attend adult education and literacy classes.

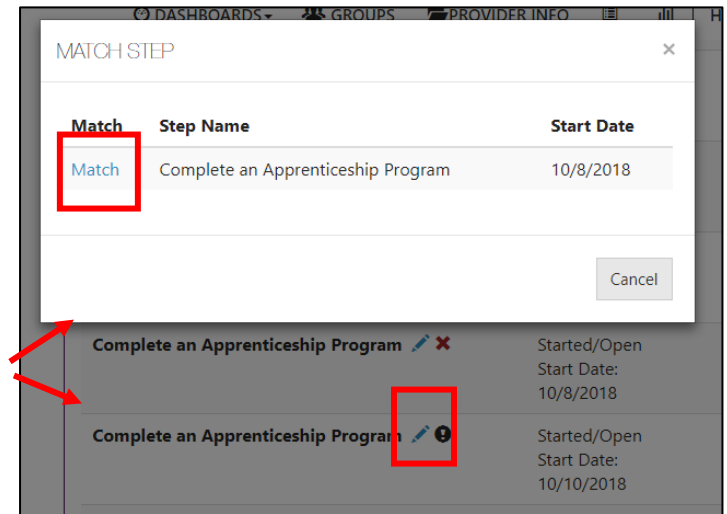
Sync a Service in the Career Plan

Services, entered in the Build a Plan section of the Career Plan, that match a service entered in IWDS will show duplicate in the list of Planned Services.

- Click the Exclamation Icon to view potential matches.
- Click Match to merge the two items into one.
- Once merged, the duplicate item is removed and show as “synced” with IWDS.
- The date is overridden with the date entered into IWDS because IWDS system holds the record for customer case files.

Items do not have to match or be matched with other items in the list of services. For example, a service provided more than once would display as the same service with different dates.

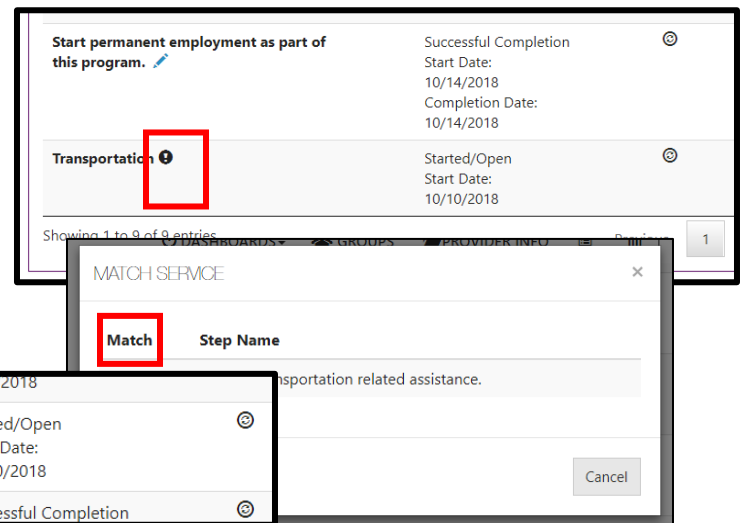
Or, a service may be added to IwN or IWDS but does not have a corresponding match between the two systems.



Sync a Service that is not in the Career Plan

Items entered into IWDS that are not in IwN Career Plan will appear in the list as “synced” with IWDS with an Exclamation Icon next to it.

- Click the Exclamation Icon to view potential service matches.
- Click Match to add the service to the customer plan.
- Click the pencil to complete adding information required for the service if applicable.



Once the service is synced and associated with a goal, it is visible in the customer’s Career Plan.