Contents

Purpose:

The CEJA/FEJA Reporting System intake tools are used to document customer outreach, demographics, status/outcomes, and referrals to other programs. As customers are added and move through the system's intake process, their status is updated automatically (system generated) or manually.

Customer Status and Descriptions Table

Stage	Customer Status	Description	System / Manual Entry
Intake	**Do Not Contact**	Customers who were added to the system and later indicated they did not want to be contacted can be marked as "do not contact" before enrollment.	Manual Entry
Intake	**Inquiry**	Customers who were entered into the system have not completed the prescreening process and have not been marked as do not contact.	System Generated
Intake	**Prescreening**	Customers who have completed prescreening, are found eligible, are interested in the program, and have either been synced with an Illinois workNet account or an account was created for them.	System Generated
Intake	**Applicant**	Customers who have started or completed the application process, are found eligible but have not been formally accepted into the program yet.	System Generated
Intake	**Not Enrolled - Not Eligible**	Customers who completed the prescreening and application process, and results indicate the customer is not eligible.	System Generated
Intake	**Not Enrolled – Declined to Participate**	Customers who have completed the prescreening and application process, are found eligible, and the customer indicated they did not want to participate.	Manual Entry
Service Delivery	**Enrolled**	Customers who have completed the prescreening and application process and started a service are automatically enrolled in the program.	System Generated
Outcomes	**Withdrawn (manual entry)**	Customers who have started a service and they withdraw or are dismissed from the program.	Manual Entry

Outcomes	**Complete**	Customers who completed program training services and continue to receive career/transition services.	Manual Entry
Outcomes	**Exited**	Customers who no longer receive training, transition/career services, or student support services. They have one year of active follow-up and transition services for one year. After one year, they no longer receive support services.	Manual Entry

Who Enters/Maintains Data

- Grantees enter minimal customer information into the reporting system to document customer outreach and a follow-up date. They complete the prescreening to identify eligible and priority customers. They complete the application to verify eligibility and to apply for a specific CEJA program.

Customer Information Tab Features

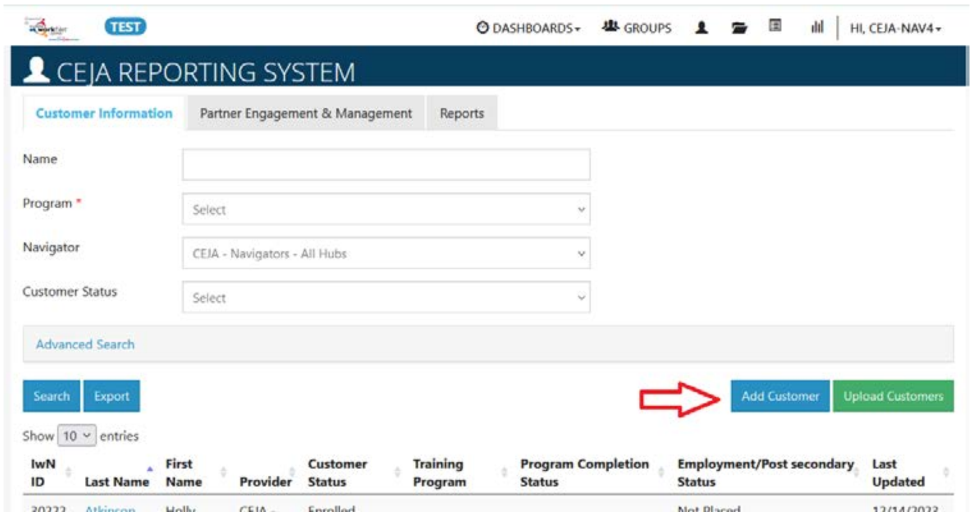
The Customer Information tab provides a list of customers in the reporting system. Grantees use this tool to:

- Add/upload customers
- Search/filter customers by:
  - Name
  - Program
    - CEJA – Climate Works – Includes customers who were entered into the system by a Climate Works Grantee, have a Climate Works grantee identified in their prescreen or applied to the Climate Works program.
    - CEJA – Contractor Incubator/Accelerator Program - Includes customers who have a Contractor Incubator program identified in their prescreen.
    - CEJA – Refer to Navigator- Includes customers who were an applicant in a CEJA program and then referred back to a navigator to switch programs.
    - CEJA – Referred to NonCEJA Program – Includes customers who were referred to a NonCEJA program during the prescreening process.
    - CEJA – Returning Residents – Includes customers who were entered into the system by a Returning Resident Grantee, have a Returning Resident grantee identified in their prescreen or applied to the Returning Resident program.
    - CEJA Waiting List – Include customers who were put on a waiting list during the prescreening process.
    - CEJA – Workforce Hubs – Includes customers who were entered into the system by a Workforce Hub Grantee, have a Workforce Hub grantee identified in their prescreen or applied to the Workforce Hub program.
  - Navigator grantee – This field is displayed for users who are Navigator Program grantees.
  - Provider grantee – This field is displayed for users who are Climate Works or Workforce Hub Program grantees.
  - Customer status
    - Do Not Contact

        - Inquiry
        - Prescreen
        - Applicant
        - Enrolled
        - Not Enrolled - Not Eligible
        - Not Enrolled – Declined to Participate
        - Not Enrolled – Referred to a NonCEJA Program
        - Withdrawn (manual entry)
        - Complete
        - Exited
    - EJC/R3 (Filter to identify the priority of service customers)
        - EJC Only
        - R3 Only
        - EJC and R3
        - Not in EJC or an R3
    - Other Eligibility Situations (Filter to identify the priority of service customers)
        - Foster Care
        - Prior involvement with the legal system
        - Formerly Incarcerated
        - Displaced Energy Worker
    - Other Barriers to employment (Filter to identify the priority of service customers)
        - Yes
        - No
        - Prefer Not to Say
    - Gender
    - Ethnicity
    - Age
    - Veteran Status (Filter to identify the priority of service customers)
- Export customer information
- Sort customers by column headers
- View detailed customer information by selecting the customer's last name link

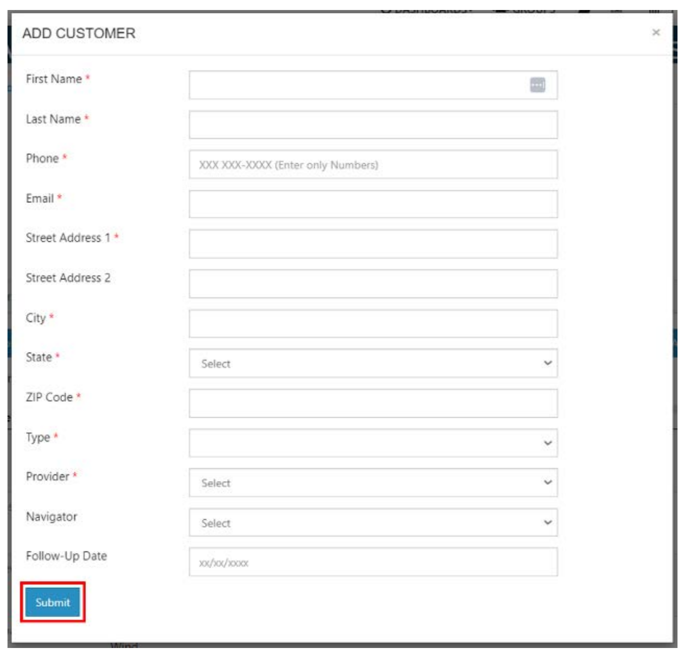
Access List of Customer and Customer Details

1. Log into www.illinoisworknet.com
2. Select My Dashboard
3. Select Customer Support Center under Partner Tools.
4. Select Groups in the top menu
5. Select the group CEJA/FEJA Programs
6. On the customer list page, grantees can add customers to their program.



Add Customers Option 1: Enter Individual Customers

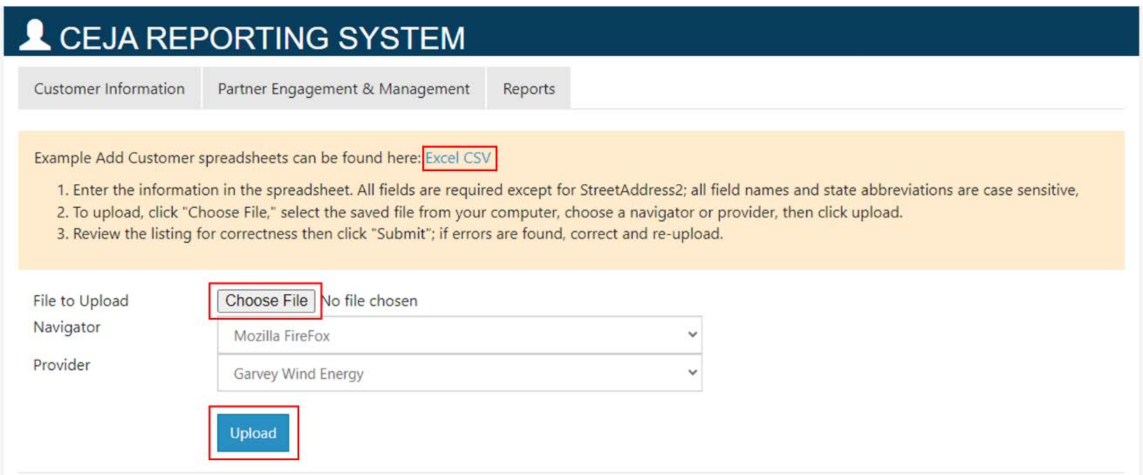
1. Select the button Add Customer
    a. Enter the information in the Add Customer window
    b. Name
    c. Phone
    d. Email
    e. Address
    f. Customer Type
    g. Provider or Navigator
    h. Follow-Up Date
2. Click the button to Submit.
3. If the customer already exists in the CEJA/FEJA Reporting System (whether added by your organization or another), the system will notify you to submit a ticket through the Help Request System.
4. If the customer does not already exist in the system, you can either:
    a. Follow-up at a later date, or
    b. Proceed to the customer's prescreening information.
5. At this point the customer status is inquiry unless they have been marked as do not contact.



Add Customers Option 2: Add One or More Customers Using the Upload Tool

1. On the customer list screen click the button "Upload Customers".
2. Click to download the example Excel "CSV file" and update the information in the spreadsheet with your customers' information.
3. Save the updated file and click the "Choose File" button to upload your file.

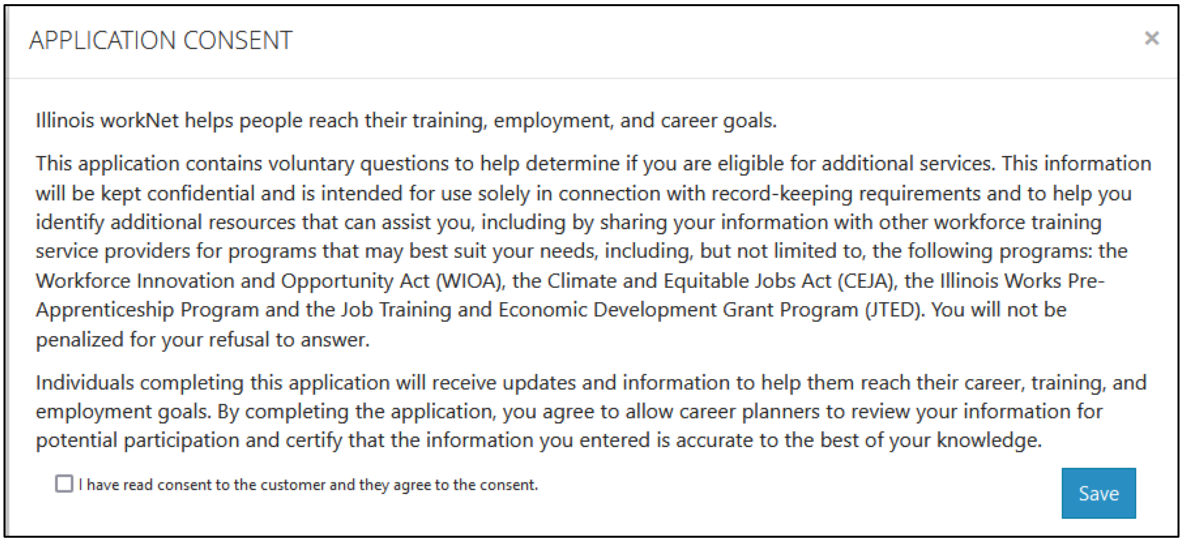
4. Then select the "Upload" button to add your customers into the Climate Works system.
5. If there are any issues with the data being uploaded, this will be specified on screen. You can update the data and re-upload the customers at that time. Once uploaded, these customers will have an inquiry status unless they have been marked as do not contact.



Enter Prescreening

Prescreening is completed by grantees and is used to collect basic customer information to identify programs they may be eligible for before completing a program application. It is used as a discussion tool to share information about CEJA programs to help the customer make an informed decision.

1. If the customer was added by:
   a. Entering them with the Add Customer button (Option 1), the following steps will automatically happen once the customer information has been added to the system.
   b. Uploading one or more customers (Option 2), go to the customer list and select the linked customer name to continue with the intake process.
2. Read the consent to the customer. Once the customer verbally agrees to the consent, check the consent box and continue with the prescreening.



APPLICATION CONSENT

Illinois workNet helps people reach their training, employment, and career goals.

This application contains voluntary questions to help determine if you are eligible for additional services. This information will be kept confidential and is intended for use solely in connection with record-keeping requirements and to help you identify additional resources that can assist you, including by sharing your information with other workforce training service providers for programs that may best suit your needs, including, but not limited to, the following programs: the Workforce Innovation and Opportunity Act (WIOA), the Climate and Equitable Jobs Act (CEJA), the Illinois Works Pre-Apprenticeship Program and the Job Training and Economic Development Grant Program (JTED). You will not be penalized for your refusal to answer.

Individuals completing this application will receive updates and information to help them reach their career, training, and employment goals. By completing the application, you agree to allow career planners to review your information for potential participation and certify that the information you entered is accurate to the best of your knowledge.

☐ I have read consent to the customer and they agree to the consent.

Save

1. Enter the fields in the Prescreening window:
    a. Do you need any accommodations to complete this prescreening or application?*
    b. Name*
    c. Phone
    d. Email*
    e. Date of Birth*
    f. How did you hear about the program? *
    g. Are you interested in working in construction or the building trades? *
    h. Are you interested in working in the clean energy field? There are several career paths available, such as becoming a solar installer, wind turbine technician, or insulation installer.*
    i. Which of the following clean energy industries are you interested in learning more about? *
    j. Are you interested in applying for an apprenticeship program? *
    k. Are you willing and able to put in the time required by this program? *
    l. You may have challenges that make it difficult to participate in the training program. Our program covers training expenses and offers support, such as childcare and transportation vouchers, to help you succeed. You'll also receive a stipend. Are you experiencing any barriers that would keep you from attending the training? *
    m. Enter the address to determine if the customer lives in an EJC/R3 area. *
    n. Have you ever been incarcerated for a felony or misdemeanor? *
    o. Are you a graduate of foster care or currently in foster care? *
    p. Are you a displaced energy worker? *
    q. What racial or ethnic groups best describe you? *
    r. Veteran Status*
    s. Do you have a high school diploma, General Education Development (GED) certificate, or High School Equivalency Diploma (HiSED)? *
    t. A table will show that the customer may be eligible for the Climate Works and/or Workforce Network programs. It also includes check for availability, desire for apprenticeship and interest in Clean Jobs.
    u. Select the Program. *
    v. Select the Provider. *
    w. Select the prescreening results. *

x. Enter the prescreening date. *
y. Enter the follow-up date (not required).
z. Click the button to continue.

2. Once the prescreening information has been entered, make sure all of the required fields are entered. If the "no email address" box is checked, the system will automatically populate it with a placeholder email. KEEP the email address in the box and type the email address in the confirm email field. You will be able to update this information later in the program when the customer has a working email address.
3. Select Search for Existing Applicant to check to see if there is an existing Illinois workNet account based on this customer's information.
   a. If no account is identified, a new one will be created. You will see the customer's username and password for their Illinois workNet account. Provide both to the customer.
   b. If an account is identified, you can sync to that account. Make sure the customer knows their username. If they do not remember their password, they can recover it, or you can assist with providing them a temporary password.
   c. If more than one account is identified or the information conflicts with an existing account, you will need to submit a ticket through the Help Request System. A member of the Illinois workNet Team will then reach out to you to resolve this. Provide both to the customer.
4. At this point, the system-generated customer status is prescreening unless they have been manually marked as do not contact.
5. You can then click the button to Continue Initial Application.

Completing CEJA Application

The application is completed by the grantee. Prescreening information will prepopulate the application fields and can be updated as needed. Additional information is collected. Once the application is submitted for a specific CEJA program, eligibility is determined and the customer is identified as an applicant with the grantee's organization/program.

1. On the Demographic and Contact Information screen, enter the following information (**Note**: fields below that are bolded will auto-populate from the prescreening that was entered):
   a. **First Name***
   b. **Last Name***
   c. Do you have an SSN?*
   d. **Email***
   e. Confirm Email*
   f. **Street Address 1***
   g. **Street Address 2**
   h. **City***
   i. **State***
   j. **Zip Code***
   k. Primary Phone*
   l. Primary Phone Type*

m. Alternate Phone
n. Alternate Phone Type
o. **Date of Birth***
p. **What sex were you assigned at birth, on your birth certificate**?*
q. How do you currently describe yourself?*
r. Are you authorized to work in the US?*
s. **What racial or ethnic groups best describe you?***
t. **Have you ever been incarcerated for a felony or misdemeanor?***
u. **Are you a graduate of foster care or currently in foster care?***
v. **Are you a displaced energy worker?***
w. Do you have a high school diploma, GED, or HiSED?*
x. Application Submit Date*

2. Click the Cancel button or the Save and Go to the Next Page button.
3. The next page is the Eligibility check screen. The eligibility criteria will be listed showing what, if any, criteria the customer is meeting. To proceed with the customer's intake process click the button Continue to Intake. If the customer is not interested in participating select the I'm not interested button.
    a. Note: For adult programs, if the customer you have entered is not yet 18, but will be turning 18 while receiving training services, then you may select this from the radio button that appears and clicking the Continue to Intake button.