Contents

Overview

Purpose

The Career Plan tool is used by career planners while working with customers to:

- Review Assessment Results
- Create goals based on Assessment Results
- Identify steps/services needed to achieve those goals
- Document the status and flag when interview is needed

Highlights:

- The career planner reviews information and identifies recommended next steps that include start/end dates, status, notes, associated costs, and earned credentials (when applicable upon successful completion of the credential).
- The career planner adds recommended steps/services by selecting from a list of steps/services.

Who Enters/Maintains Data

Only staff and customers with access to the program can view the Career Plan.

- Statewide User Roles – Statewide staff view/edit Career Plans for all customers.
- Grantees – Staff view/edit Career Plans for their customers.
- Customers – Customers access their information from program tools located in My Dashboard.

Access Climate Works Customer Plan Overview Page

1. Go to illinoisworknet.com and login to your partner account
2. Go to My Dashboard

3. Select the Customer Support Center icon in the Partner Tools section
4. Select a customer, then select the Career Plan tab

How is the Career Plan Organized?

The Main Career Plan Navigation

Plan Overview – provides a summary view of assessments, career goals, accomplishments, and steps related to goals.

1. Review Assessment – provides assessment results saved in Illinois workNet and an Assessment Summary area to write a summary of the assessment results.

2. Set Goals – provides an area to add goals to the Career Plan. Categorize them as short/long-term goals, identify the type of goal, and set the status.

3. Add Steps/Services – provides an area to add services related to each goal. All services include the related goal, status, start date, weekly hours, and notes. A completion date is required if the status is complete.

Update Log – provides a log of Career Plan updates and uploads for customer Career Plan agreements.

Career Plan Sections – Grantee View

Plan Overview

Case Notes allow career planners to enter case notes to document changes, updates, and other notes.

Profile provides:

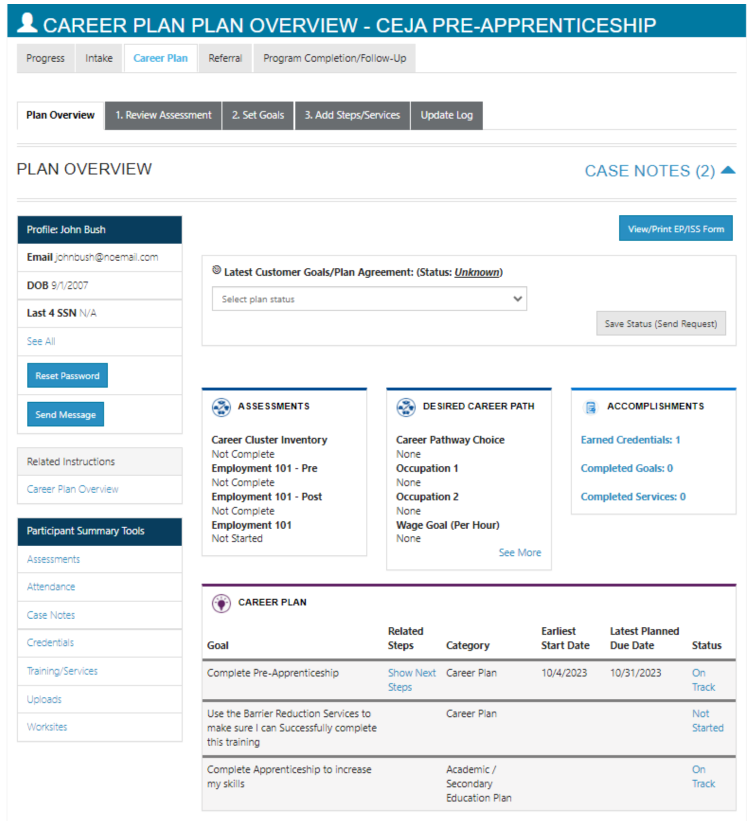
- Summary of customer information
- Message button
- Reset Password button

Instructions link to the Creating a Career Plan instructions.

Participant Summary Tools provide quick access to:

- Assessments
- Case Notes
- Upload Tool
- Worksite Information

Latest Customer Goal/Plan Agreement – This section provides evidence that the customer participated in the development of their Career Plan.



- Physical Signature – Use the View/Print Form button to have the customer and career planner sign the bottom of the document. Then upload the agreement using the Uploads tool. You will finish the physical signature process by selecting the status that reflects a signature was collected, and documentation was uploaded/on file.
- Electronic Signature – Use the Send Electronic Request for Customer Agreement option to send a customer the electronic version to sign. The customer will receive an email and an Illinois workNet Dashboard Message with instructions on how to sign the document. Once the document is signed, the customer's account will update to reflect such.
- Unable to Collect Signature – Use the Unable to Get Customer Agreement on File option.

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

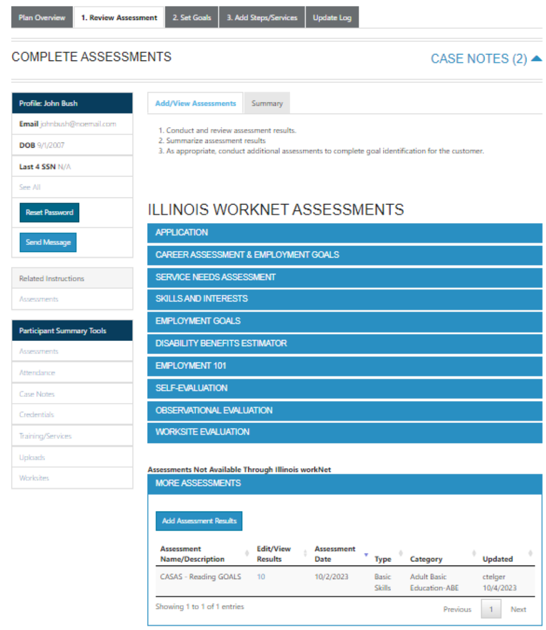
The desired Career Path is part of the Employment Goal assessment. This information can be updated at any time. Select See More to go directly to the Employment Goals in the assessment section.

Accomplishments provide 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. It includes a list of the steps/services associated with each goal. The start and end dates for goals are automatically generated by the steps/services of that goal. Goal status is set by the career planner and is used to identify not started, on track, off track, or complete.

Review Assessment

It is important to complete assessments to identify customer skills, interests, goals, and barriers.



1. Go through each of the assessment sections.
2. Add an Assessment Summary (optional). Saved assessment summaries are available in the Assessment Summary tab.

Set Goals

Goals should be written to address barriers, employment goals, education/training, and related credentials that can be earned to advance the customer through their career pathway. Goals should be realistic, measurable, and attainable. **Note**: Goals will be pre-populated for the CEJA program, but they can be edited by selecting the button "Edit".

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

1. Select the Set Goals tab and Add Goal Statement.
2. Enter a Goal Statement that is 144 characters or less.
3. Select a Category.
4. Identify if the goal is Short-Term or Long-Term.
5. Set Goal Status.
    a. Not Started = This status is the default setting. The career planner should update when the customer started working towards this goal. Goals with a status of "Not Started" automatically update to "Started" when the related service has started.
    b. On Track = The customer is continuing to progress through the steps in this section of the plan at an acceptable rate.
    c. Off Track = The customer is not progressing through the steps in this section of the plan at an acceptable rate.
    d. Complete = The career planner verified the customer completed this section of the plan.

Services

Service Types

There are four basic types of templates that are used for services.

Training service sections include:

- Status (required) - All services include the related goal, status, start date, weekly hours, notes, and related barriers. A completion date is required if the status is complete
- Service Provider (required) - Identify who is providing the service. The grantee is the default provider. If the grantee is not providing the service, enter the provider information

- Post-assessment (required upon completion) – The post-assessment section is preset with 70% as the passing score. The grantee will need to enter a post-assessment score of 70% or higher before the service can be marked as successfully completed.
- Credentials – There are several credentials listed on this tab. Select the credentials earned with the service. The fields will be prepopulated so that only the credential source and date earned need to be entered. If additional credentials are earned, they can be manually entered.

Wrap Around Service/Barrier Reduction service sections include:

- Status (required)
- Service Provider
- Dollar Value of Service (required) – Enter the dollar amount related to the service. For example, if transportation, a bus pass, or a gas card was provided, you can add it to this service.

Student Support Service sections include:

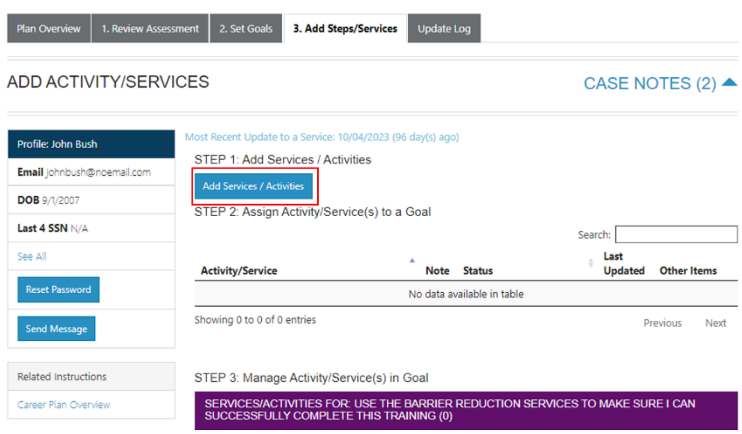
- Status (required)
- Service Provider
- Dollar Value of Service

Transition Service sections include:

- Status (required)
- Service Provider
- Dollar Value of Service

Add/Edit Services

Career plan goals will be prepopulated with required training and career services.



1. Edit existing services by selecting the service or the pencil icon next to the services to update existing services.
2. Add new services by selecting Add Step/Service.
    a. A modal will open with services to select from. Click Add next to each step to add to this customer's Career Plan.
    b. It will appear at the top under Step 2: Assign Service to a Goal. Once you have assigned it to a goal in the status tab, it will move to Step 3: Manage Services within each goal section.
3. Edit Services – Click the pencil icon to update the service.
    1. **Status** - All services include the
        a. Related goal (required)
        b. Start/end dates (required)
        c. Status (required)
            i. Planned/Not Started (Scheduled) – The start date must be on or after the application date.
            ii. Started/Open – The start date must be on or after the application date.

   iii. Successful Completion – The completion date will appear. The completion date must be at least one day after the start date. If the service is a training service, a provider and post-assessment are required.
   iv. Unsuccessful Completion – The completion date will appear. The completion date must be at least one day after the start date. If the service is a training service, a provider is required.
   v. Evaluation/Not Required
  d. Weekly Hours (required) – This is a numeric text box. If weekly hours do not apply to a specific situation, the system allows the user to enter 0.
  e. Notes (optional)
2. **Service Provider** - Identify who is providing the service. The grantee is the default provider. If the grantee is not providing the service, enter the provider information
3. **Post-assessment**– This section is for training services only. The post-assessment section is preset with 70% is the as the passing score. The grantee will need to enter a post-assessment score 70% or higher before the service can be marked as successfully completed.
4. **Credentials** – There are several credentials listed on this tab. Select the credentials earned with the service. The fields will be prepopulated so that only the credential source and date earned need to be entered. If additional credentials are earned, they can be manually entered.
5. **Dollar Value** - On this tab you will enter the cost by selecting the Add Service Cost button (**Note**: you can enter multiple costs to one Barrier Reduction/Support Service, i.e. you are not required to add one service for one cost.) Enter in the information for the cost for all required fields and then click the Save button. The cost information will then be entered into the table for that service. It will also show up on the customer's Progress tab and is aligned to the Service Needs Assessment.

Career Plan Sections – Customer View

How To Get To Your Career Plan

1. Log into www.illinoisworknet.com
2. Select My Dashboard.
3. Select Dashboard.
4. Select CEJA in the Career Plan Section. The bar next to your career plan will show your progress.

Getting Started

1. As you work with your career planner, your career plan will be created and available in your Illinois workNet account.
2. Once your first draft is complete, your career planner will as you to agree to the plan.
   a. They may print a copy and have you sign it, or
   b. They may ask you to sign it electronically. That means that you must:
      i. Go to your Career Plan and
      ii. Select the Respond link. Then agree or disagree with the plan.

Features Overview

All Career Plan menu tabs include the Customer Goals/Plan Agreement section. This is where you can:

- Agree or disagree to the plan.
- View the agreement status.
- Print a copy of your plan.

The Skills, Interests & Experience tab is where you can:

- View assessment results that were used to identify your goals and steps.
- View assessment results to show your progress when you are in the program.

The Plan Goals and Steps tab is where you can view:

- A summary of your goals and planned steps to reach those goals.
- Related Illinois workNet resource for some steps.
- Your progress and planned completion dates.
- Steps/Services are a link to see more information about that step.
  - Select the information icon to see a short description of the step/service.
  - Some steps have a link to more information in Illinois workNet.

The Accomplishments tab is where you can:

- View a summary of your earned credentials, completed goals, and completed steps/services.
- View a checklist of Resume Builder items that are saved in your account.
- Easily get to the Resume Guide.
- Easily get to the Resume Builder. Make you update your resume with your new skills, work history, and earned credentials.

The Job Leads tab is where you have easy access to:

- Job search tools.
- Job search-related articles
- Your bookmarked Job Finder job postings.

The Update Log tab is where you view a history of changes made to your career plan.