

# IWDS 2.0 CAREER PLANNER LEARNING SERIES

# Session 4: The Career Plan Workflow

# Recording Notice

The Illinois Department of Commerce and Economic Opportunity (DCEO) allows for the recording of audio, visuals, participants, and other information sent, verbalized, or utilized during business-related meetings. This meeting is scheduled to be recorded by DCEO.

- ☐ Your participation in this meeting without expressing an objection to recording will be treated as consent. Any participant who prefers to participate via audio only should disable their video camera so only their audio will be captured.

# Virtual Meeting Guidelines

**1**

## **Minimize Background Sounds**

Mute your phone or computer microphone when you are not speaking to keep the session clear and focused for all participants.

**2**

## **Be Present**

Use the "Raise Hand" reaction to indicate you'd like to speak aloud. Wait until you're called on. Stay engaged and minimize distractions during the session.

**3**

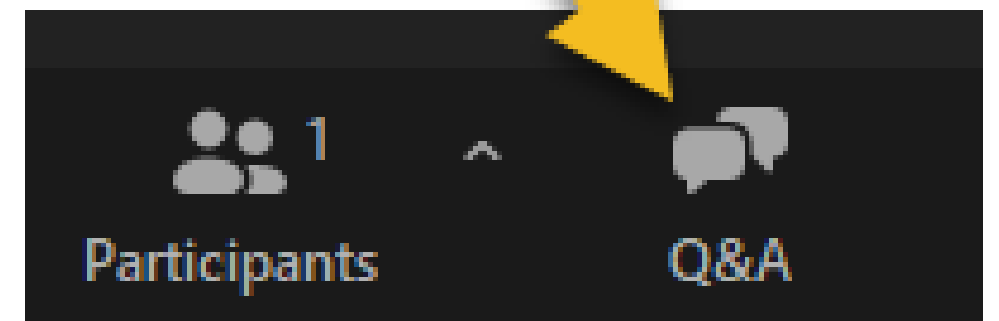
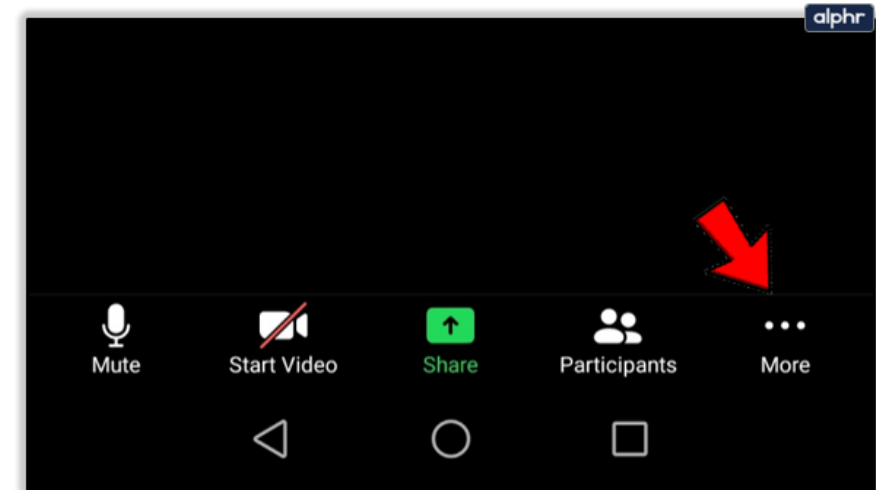
## **Engage Everyone**

Turn on your camera if you feel comfortable doing so. Put any questions or comments in the chat so everyone can benefit from the discussion.



# Please use the Q&A feature for questions!

- To locate the Q&A feature, click on the "More" icon on the toolbar the bottom of your screen
- Then select "Q&A" - this will place the Q&A feature on the toolbar for easy access.



# Career Planner Learning Series

VIRTUAL

APRIL 2026

Six focused virtual sessions will walk career planners through the complete workflow — from first contact with a customer to account access in IWDS 2.0. Each session builds on the last to give you a full picture before in-person training begins.

01

## Session 1: Customer-Centered Career Planner Workflow



An overview of how the full workflow is structured around the customer's journey, not the system's requirements.

03

## Session 3: The Getting Started Assessment



How to conduct assessments that support individualized service planning rather than one-size-fits-all categorization.

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## Session 5: The Referral System

Navigating referrals to partner services and supports to ensure customers get holistic, coordinated assistance.

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## Session 2: Intake and Eligibility Workflow



Step-by-step guidance on gathering information and determining eligibility in a welcoming, customer-centered way.

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## Session 4: The Career Plan Workflow

Building and maintaining career plans as living documents that evolve with the customer's goals and circumstances.

06

## Session 6: IWDS 2.0 Account Access for Career Planners

Practical guidance on setting up and managing account access so you're ready for day one.

# Polling Questions – Reflections on Microteach 3

Take a moment to reflect on the last session before we dive into today's content. Your responses help us calibrate and ensure everyone is starting from the same place.

**1**

## Question 1: Attendance

Were you able to attend or watch the recording of Microteach 3?

- Yes
- No

**2**

## Question 2: Your Mindset on the Getting Started Assessment

Which statement best matches how you're thinking about it now?

- It's a guided conversation that builds on intake to understand goals, history, skills, and barriers — and shapes the first career plan
- It's mostly something I complete to move the customer forward in the system or meet timelines
- It's mainly where I decide whether a customer is ready for training or work-based learning
- I'm still not totally clear on how the Getting Started Assessment fits into the overall process

# Today's Learning Objectives

By the end of today's session, you'll have a clear and practical understanding of the Universal Career Plan, Outcomes, and the Exit process — and how each connects to your day-to-day work with customers.



## Explain the Purpose

Articulate why the Universal Career Plan exists and how it supports customer-centered service delivery.



## Describe Key Sections

Walk through the major components of the Universal Career Plan and what each section is designed to capture.



## Goals, Steps & Services

Describe the key actions Career Planners take using the Recommendations page to manage goals, steps, and services.



## Outcomes & Exit

Explore high-level aspects of Outcomes, Exit, and Follow-Up processes that close the loop on a customer's service journey.

# Today's Agenda

This session is structured to take you from the big picture of *why* we're changing to the practical details of *what's* changing and *how* you'll be supported throughout.

**1**

## Part 1

Purpose of the Universal Career Plan — the "why" behind the new approach

**2**

## Part 2

Features of the Universal Career Plan — a detailed look at its structure and sections

**3**

## Part 3

Outcomes, Exit, and Follow-Up — closing the loop on a customer's service journey

**4**

## Part 4

Next Steps — what to expect, what to practice, and how to get support

# Chat Storm ⚡

We want to hear from you! In the chat, please share:

## 👋 Your Name

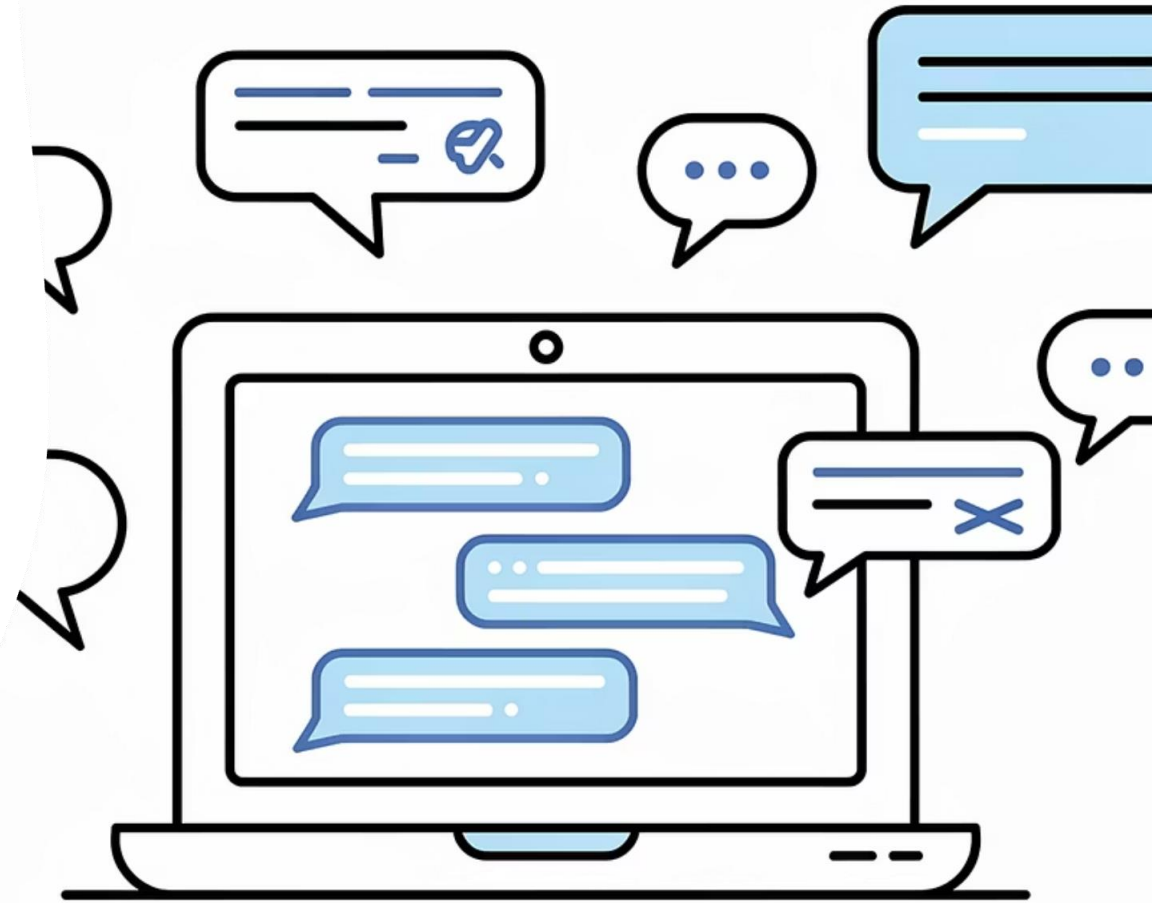
Introduce yourself so the group knows who's in the room today.

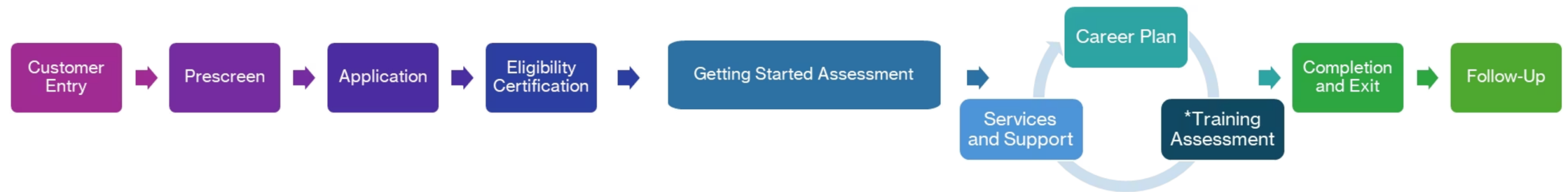
## 📍 Your LWIA

Let us know which Local Workforce Innovation Area you're representing.



Think of the last few career plans you put together with your customers. What was most valuable about that process?

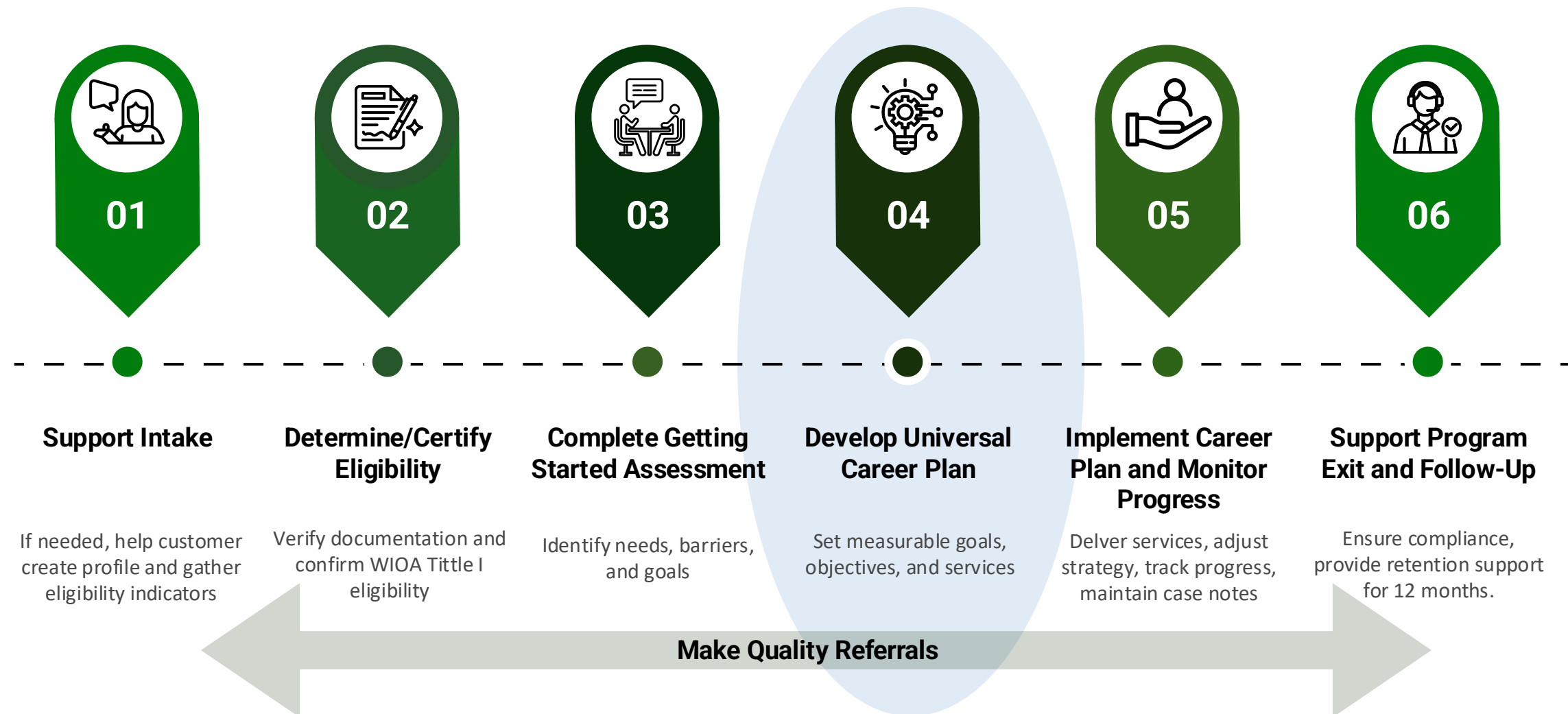


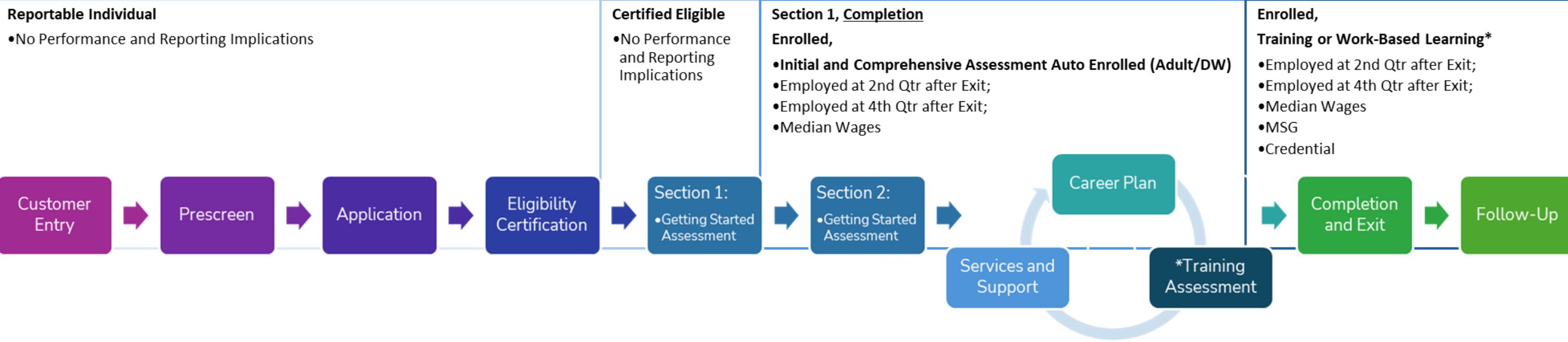


# IWDS 2.0 Customer Journey

# Career Planner Workflow as Supported by IWDS 2.0

The statewide workflow guides career planners and customers through a structured, consistent journey from first contact to long-term follow-up. Each phase builds on the last to ensure no step is missed.





**IWDS 2.0 Customer Journey- *Performance and Reporting Reminders***

## Performance & Reporting Reminders – *Customer Entry- GSA Section 1*

Understanding what data is collected at each step — and how it affects reporting status — is essential for compliance. The table below summarizes the reporting implications of the Customer Entry stage in IWDS 2.0.

2.0 System Step	Data Gathered	Reporting Status	Performance & Reporting Notes
Customer Entry- GSA Section 1	Name, Email, Zip Code, Date of Birth, Optional: Phone	Reportable Individual	1A, 1D, 1Y — None. Data is collected but no performance measures are triggered at this stage.

## Performance & Reporting Reminders – *After submitting GSA Section 1*

Understanding what data is collected at each step — and how it affects reporting status — is essential for compliance. The table below summarizes the reporting implications of the Customer Entry stage in IWDS 2.0.

2.0 System Step	Data Gathered	Reporting Status	Performance & Reporting Notes
After <b>submitting</b> GSA Section 1	Contact Information Eligibility Information Goals, Expectations, Employment and Education History	Participant	Employed at 2 <sup>nd</sup> Qtr after Exit; -Employed at 4 <sup>th</sup> Qtr after Exit; -Median Wages

# First, a Quick Recap

Before moving forward, let's revisit a few key concepts from the last session — particularly around enrollment — to make sure we're all aligned, and any lingering questions are addressed.

- **When exactly is someone considered enrolled?** — When the Career Planner submits Section 1 of the GSA
- **What's the difference between a Reportable Individual and an Enrolled participant?** — Reportable Individuals have no performance implications; Enrolled Participants do.
- **Does enrollment auto-populate the career plan?** — When a customer is enrolled, the system will unlock the recommendations their data has activated- those will be viewable on the Recommendations Tab on their Career Plan.

# When You Are Ready to Enroll

Once you have completed the first section of the Getting Started Assessment, the system will display a confirmation screen. This screen is an intentional checkpoint — it ensures that Career Planners are fully aware that by moving forward, the customer will be officially enrolled in the program.

01

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## **Complete Section 1 of the Getting Started Assessment**

Conduct the guided conversation covering goals, work history, skills, expectations, and barriers.

02

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## **Review the Enrollment Confirmation Screen**

The system displays a screen prompting you to acknowledge that advancing will enroll the customer.

03

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## **Confirm and Advance**

Once confirmed, the customer is enrolled and the career plan begins to take shape based on their assessment data.

Phase 5

# Career Plan & Services

A structured guide to career planning, service delivery, progress tracking, case notes, and program exit under WIOA.

# The Getting Started Assessment and the Customer Journey

Complete Getting Started Assessment with career planner

01



02

Complete training assessment with career planner (if needed)

Complete other assessments as needed

03



Identify goals and services

04

05  
Sign career plan



# What Is a Career Plan in IWDS 2.0

## Definition

The Career Plan is an **electronic**, jointly developed, living document that identifies a customer's educational and employment goals, achievement steps, career pathway, supportive service needs, and required services.

## Purpose

It serves as the primary instrument for documenting service decisions and ensuring all assessed needs are fully addressed — continuing through exit and follow-up.

 No more paper Career Plans — the Career Plan is now fully housed in the system.

# A Living Document

The initial Career Plan is informed by intake assessments, including the Pre-Screen, Application, and Getting Started Assessment.

As additional assessments are conducted and more information is gained and input into the system, the Career Plan continues to evolve and is updated to reflect new information.

## **Adults & Dislocated Workers**

Career Plan incorporates the **Individual Employment Plan (IEP)**

## **Youth**

Career Plan incorporates the **Individual Service Strategy (ISS)**

# Career Plan: Three Sections

## Recommendations

System-generated Goals, Steps, and Services based on assessments. Career Planners select, add, and finalize.

## Plan

Finalized hierarchical plan — Goals, Steps, Services. Actionable, realistic, and tailored to the customer.

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## Signatures

Electronic signatures by the customer and Career Planner confirm mutual understanding and commitment.

- For youth, the plan can be forwarded to parents and guardians for electronic signatures.



Customers will also have access to a customer-friendly version of their Career Plan.

# Building the Career Plan - The Recommendation Page

The Recommendations tab displays **system-triggered** assessments, Goals, Steps, and Services based on customer responses.

## What It Displays

The Recommendations tab displays **system-triggered** assessments, Goals, Steps, and Services based on customer responses.

## Selecting Items

Check boxes to select items for inclusion in the Career Plan

# Purpose of the Recommendations Page

## What It Does

The Recommendations page helps Career Planners provide personalized, goal-focused guidance. Suggestions are created by the system based on each person's data — interests, skills, past activities, and assessment results.

## Suggestions May Include

- Assessments to better understand the individual's skills, interests, or readiness
- Goals that align with the individual's overall career path and/or development needs
- Clear steps to achieve those goals
- Services that support progress toward those steps and, ultimately, broader goals

# How Career Planners Should Use the Recommendation Page

## Starting Point

Use this page as a starting point for conversations with each customer. The recommendations are meant to guide planning, not make decisions for you.

## Stay Focused

Focus on the most important goals and steps to avoid overwhelming the individual. Selected Goals, Steps, and Services will build a clear plan and allow Career Planners and customers to track progress over time.

## Review & Adjust

Review each suggestion based on the person's needs, preferences, and goals. Accept, change, or ignore recommendations as needed — make sure the final choices are useful and realistic.

## Key Reminder

Recommendations are based on data, but they are not required. Career Planners play an important role in reviewing and adjusting them to fit each person's needs and goals.

# Career Plan Hierarchy

The Career Plan is built around a clear, three-tiered structure. Every element — from the broadest aspiration to the most specific support resource — has a defined place. This hierarchy ensures both clarity for the customer and accountability for the Career Planner.



## Services

Resources, training, and support options that directly help the customer achieve each step.

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## Steps

Measurable milestones with timelines that break the goal into actionable, trackable tasks.

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## Goal

The desired employment or education outcome — the foundation and driving purpose of the entire plan.

# The WIOA Title IB Services Matrix Powers Goals, Steps & Services

Every service on the **WIOA Title IB Services Matrix** is mapped to one or more Goals and Steps already built into the system. This means Career Planners don't have to start from scratch — the system surfaces the right language and structure based on the services selected.

## **Example 1: Youth Service**

**Service:** Occupational Skills Training (Youth)

**Goal:** Get ready for or complete an Associate Degree in [customer's target occupation/industry] for career stability and growth.

**Step:** Sign up for and take part in the degree program that matches your training and job goals.

## **Example 2: Individualized Career Service**

**Service:** Career Planning (Individualized Career Service)

**Goal:** Get a full-time job like you had before in [customer's target career field] with similar or better pay and benefits.

**Step:** Create and adjust your resume and cover letter to match the job you want.

# A Familiar Process, Redesigned

## What Changed

Previously, Career Planners created unique goals for each individual and tracked them on paper or within their own systems. The OET team has now aligned goals and steps with the service matrix.

## How It Works Now

Career Planners can select options that connect directly to data collected during intake, ongoing assessments, and career planning activities — ensuring each step is tied to a reportable service.

## Why It Matters

We recognize that Career Planners were often already providing many of these services without receiving proper credit. The system has now been designed to better reflect and capture the work already being done.

# Assessment Overview – Training & Work-Based Learning

## Purpose of Assessments

- Help customers make informed, realistic decisions before starting Training or Work-Based Learning (WBL) services
- Ensure readiness, feasibility, and alignment with the customer's career goals
- Create a documented record that supports program compliance and reporting

## When Assessments Are Triggered

- Added **automatically** when an associated goal is entered in the Career Plan
- Appear in the **Recommended Assessments** tab on the customer profile

## Important Requirement

Either the **Training & Education Assessment** or the **Work-Based Learning Assessment** must be completed before a start date can be entered. Completion confirms eligibility, readiness, and program fit.

# Developing the Career Plan: What It Looks Like in Practice

The Universal Career Plan is not just a form to fill out — it's a living document co-created with the customer. Here's how Career Planners bring it to life during and after the Getting Started Assessment.

## 1 Start with the Customer's Voice

Use the Getting Started Assessment conversation to surface the customer's goals, work history, strengths, and barriers. Let their words shape the language in the plan — this builds ownership and trust.

## 3 Assign Services and Support

Tie services directly to steps in the plan — from career counseling and skills training to supportive services. Each service should have a clear purpose tied to a specific step or goal.

## 2 Select Goals & Steps from the Recommendations Page

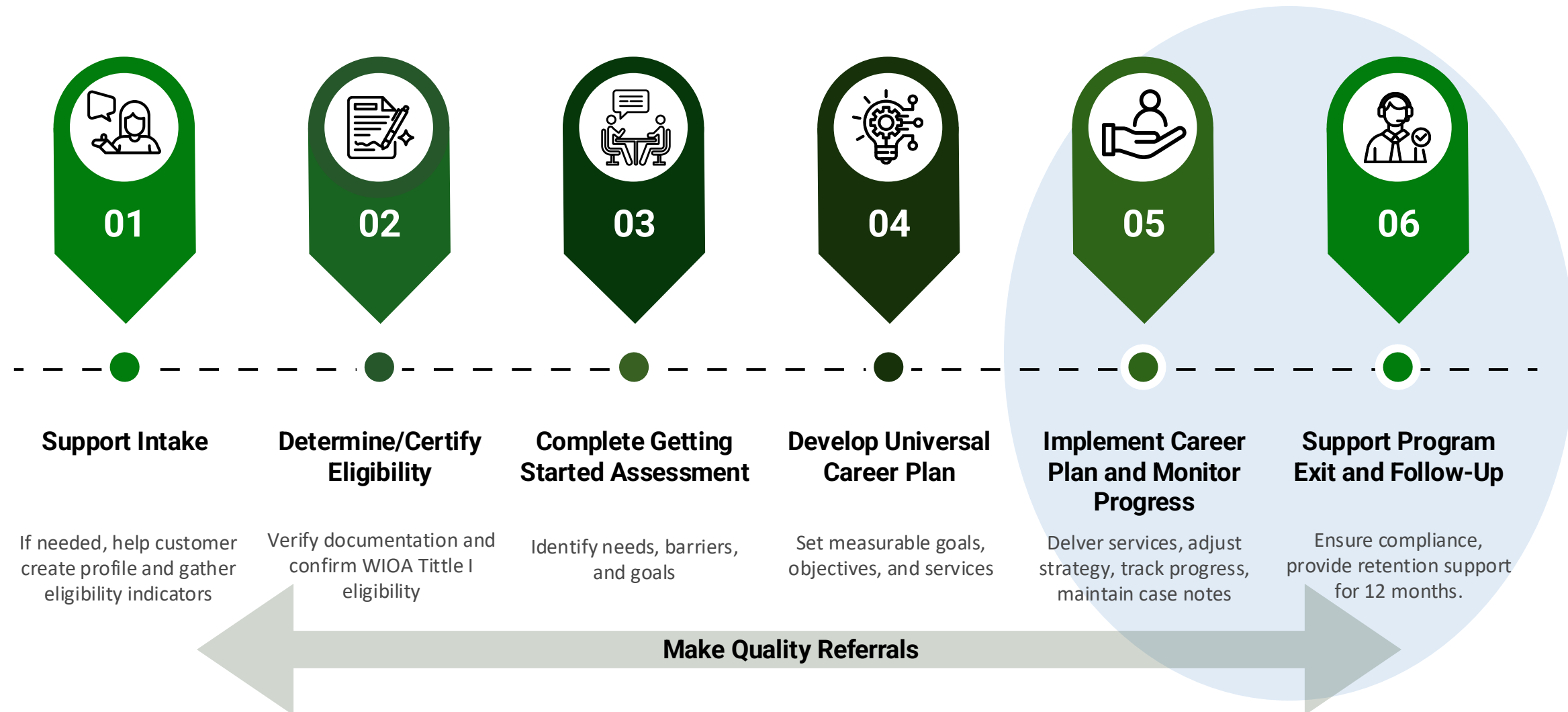
After completing the assessment, use the Recommendations page to add goals and steps that are already aligned to WIOA services. Review them with the customer and adjust as needed.

## 4 Review, Update, and Keep It Current

The career plan should be revisited at each meaningful touchpoint. As the customer progresses, update steps, add services, and document outcomes to keep the plan accurate and actionable.

# Career Planner Workflow as Supported by IWDS 2.0

The statewide workflow guides career planners and customers through a structured, consistent journey from first contact to long-term follow-up. Each phase builds on the last to ensure no step is missed.



# Tracking Customer Progress

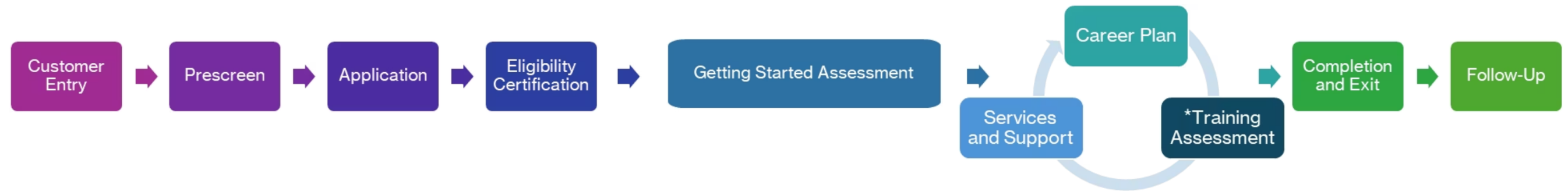
Career Planners must maintain **regular two-way contact every 30 calendar days** — or sooner as needed — to learn of changes that may alter the Career Plan or require additional services.

- During the required 30-day contact, Career Planners may need to add or defer services based on what they learn about the customer's progress.

PHASE 6

# Recording Outcomes

Accurately recording WIOA outcomes tracks customer progress, ensures accountability, and measures performance — supporting compliance with federal and state reporting requirements.



# IWDS 2.0 Customer Journey

# Transition & Exit

## Why It Matters

A planned transition confirms goals are met, services delivered, and the customer understands next steps. It promotes long-term retention and accurate performance reporting.

## Career Planner Responsibilities

Ensure all goals are closed, outcomes recorded, and employment or postsecondary entry documented before exit.

## Transition Steps

- Active Services (goals met and outcomes recorded)
- Review & Confirm (verify progress and finalize plan)
- Exit & Follow-Up (self-sufficiency and continued engagement)

# How Exit Works

## Automated Process

Exit occurs in IWDS 2.0 when there is no service activity for 90 consecutive days and no future planned services *unless* there is a recorded, allowable, reason for a pause in the system.

## Co-Enrolled Customers

Exit only when no staff-assisted services for **90 consecutive days across all DOL-funded programs** and no future services scheduled.

## Exit Date

Applied **retroactively** to the last date of service in any program.

# Key Takeaways

- The Career Plan is a **living document** — jointly developed, regularly updated, and followed through exit
- Services must be entered in IWDS within **10 days**; enrollment within **90 days** of certification
- Accurate outcome recording and a planned exit ensure **compliance, accountability, and customer success**

PART 3

# What's Next **Career Planner Learning Series**

This section provides a roadmap for the full suite of training resources being developed to support career planners through the IWDS 2.0 transition—so you know what to expect and how to prepare.

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MAY 2026

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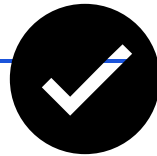
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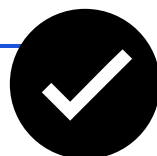
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# Stay In Touch

Please complete the session evaluation before you go!

Additional resources, updates, and announcements about IWDS 2.0 and the Career Planner Learning Series are available through the Illinois workNet page. Bookmark it to stay current as launch approaches.



[IWdSTransition](#) Visit Illinois workNet for the latest training schedules, policy updates, desk aides, and technical support resources related to IWDS 2.0. (more content coming soon!)



Thanks!

# Reference Slides – The Career Plan