IWDS 2.0

IWDS 2.0 CAREER PLANNER LEARNING SERIES

Session 6: Getting to Know IWDS 2.0

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

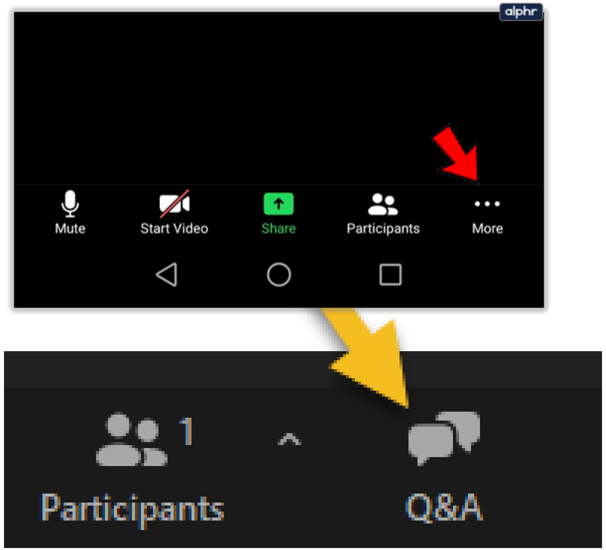
Engage Everyone

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-MAY 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.

02

Session 2: Intake and Eligibility Workflow

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

03

Session 3: The Getting Started Assessment

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

04

Session 4: The Career Plan Workflow

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

05

Session 5: The Referral System

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

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 5

•Were you able to attend or watch the recording of Microteach 5?

Yes

No

What opportunity do you think the Integrated Referral Module will create for staff?

- Better support for participants
- Better coordination of services
- Stronger referral tracking
- Improved participant outcomes
- Increased local coordination

Chat Storm

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

👋 **Your Name**

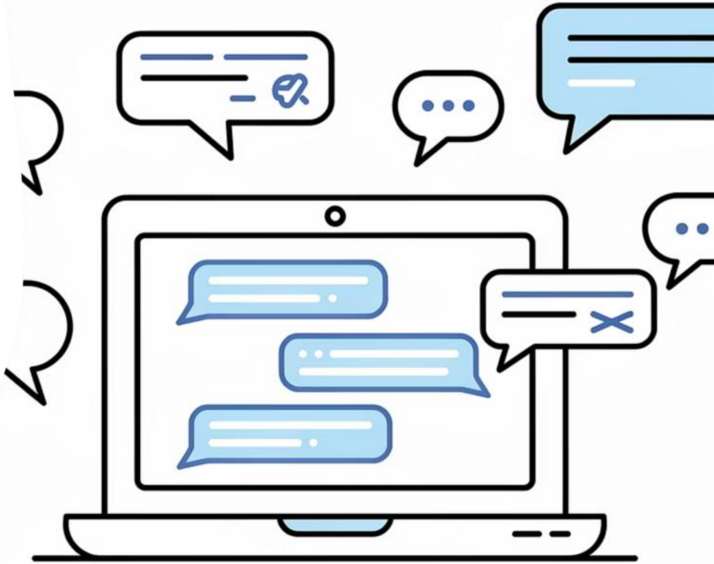
Introduce yourself so the group knows who's in the room today.

📍 **Your LWIA**

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

❤️

What are you most excited to explore in IWDS 2.0?



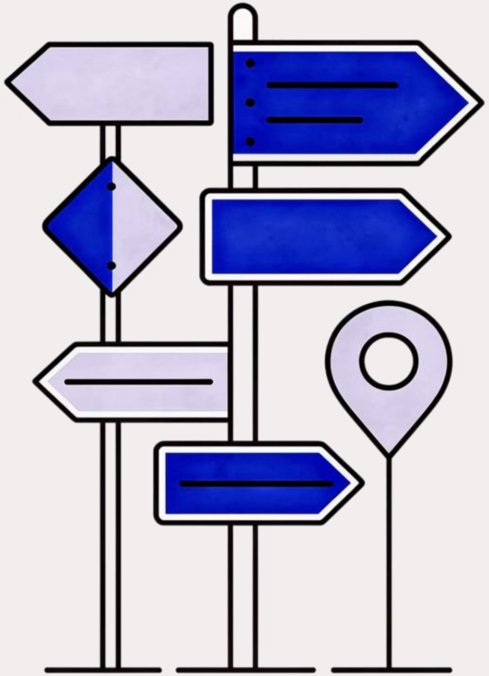
Microteach 6: Getting to Know the Case Management System

A guided walkthrough of the new case management system — built to help you support customers more efficiently from day one.

Agenda

Here's what we'll cover in this session. We'll start with some context before diving into each part of the system.

- Setting the Stage
- Getting to Know the System
    - Homepage
    - Dashboard
    - Customer Lists
    - Customer Profile
    - Participant Summary Tool
        - Case Note
        - Self Service and Information Only Services
        - Referrals
        - Resumes & Work History
        - Logs
        - Legacy Summary
    - Reports
- Getting Logged In



Setting the Stage

This System Is Still Being Built

- Parts of the system are not yet finished
- You may see **"TO DO"** labels during training — this is expected
- Your trainer will point out what's still in progress as we go

Things May Change

- Some steps and business rules are still being finalized
- The training version may look less complete than the final system
- Final details will be locked in closer to the go-live date

⚠ Don't be surprised if something looks unfinished — that's okay! We'll flag anything that's still under construction.

Setting the Stage

Training Environment (UAT)

- Training takes place in a **practice system** — not the live environment (UAT)
- You will **not** break anything — feel free to explore
- **Do not enter real personal information (PII)** at any time during training

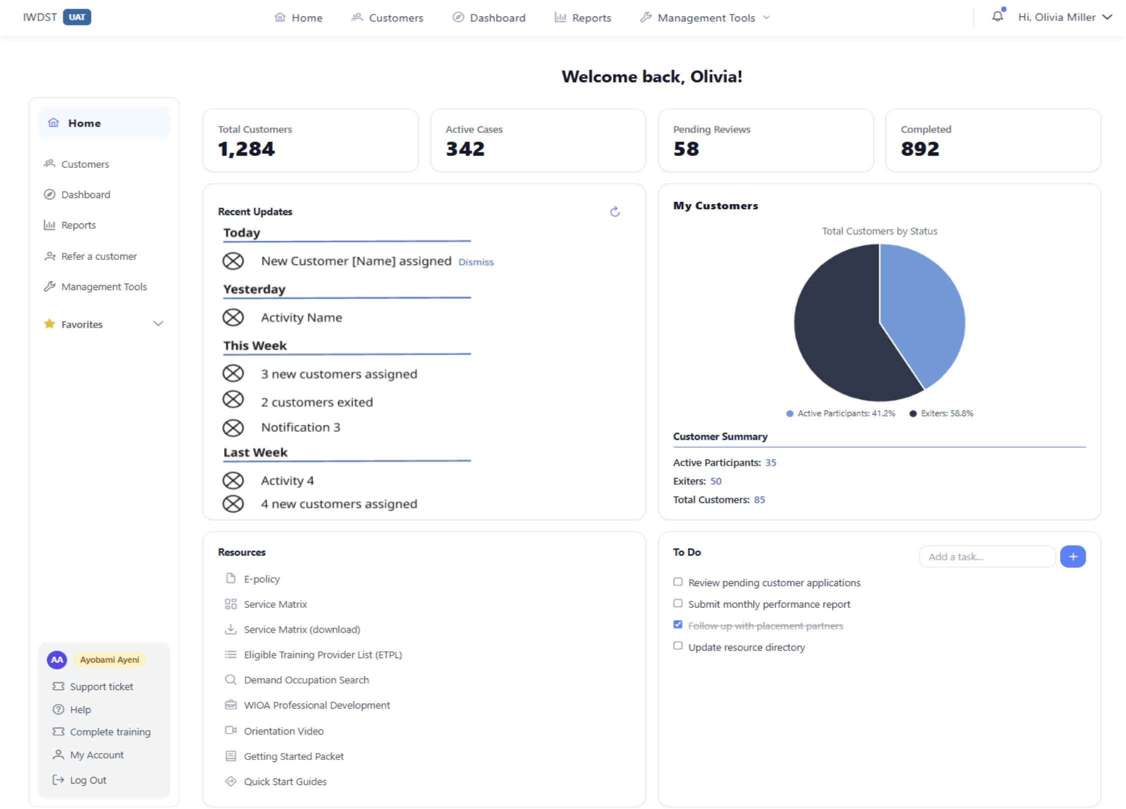
Practice Personas

- You'll use **test customers** built with realistic fake data
- These personas are provided specifically for hands-on practice
- They're designed to mirror real-world customer scenarios so you can follow along naturally

Getting to Know the System

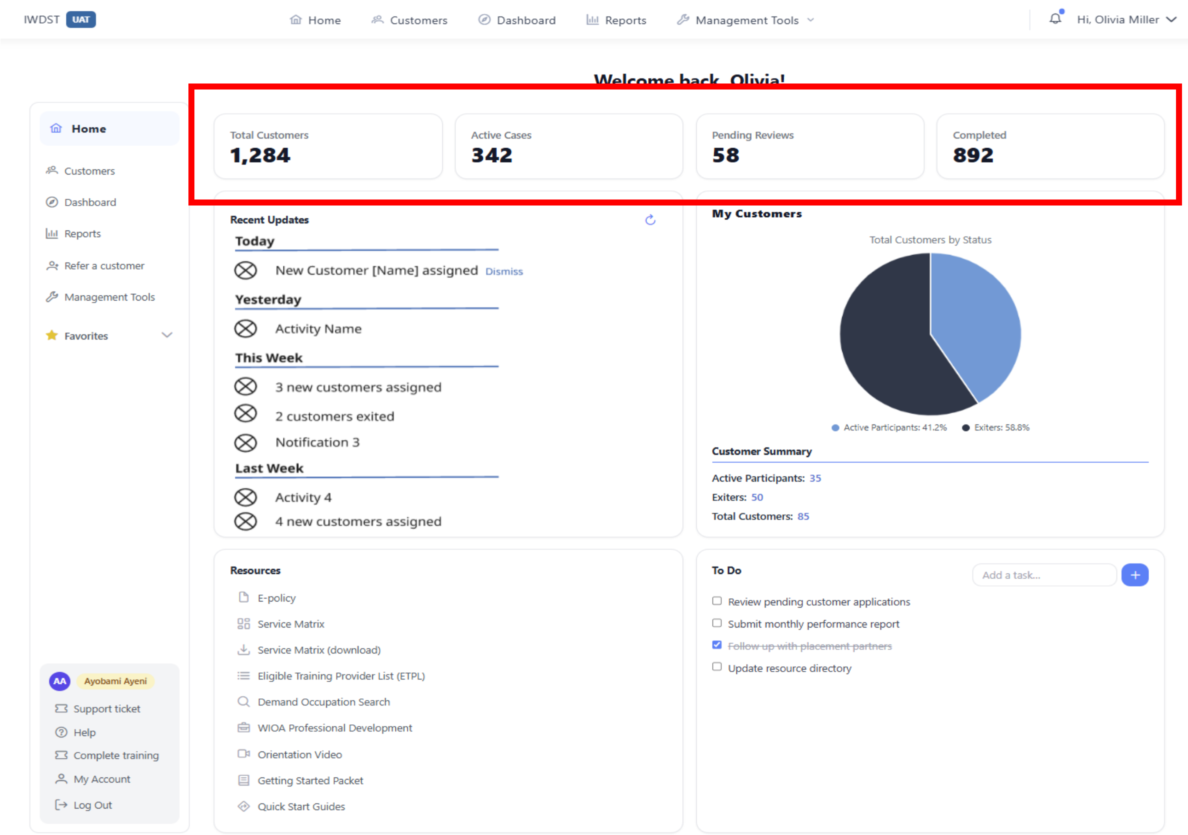
The Home Page: Your Daily Starting Point

- One place to start your day
- See what needs attention
- Keep track of your caseload



The Home Page: Understanding Your Caseload

- Summary tiles
- My Customers panel
- Recent Updates
- Resources in one place
- Personal To Do list



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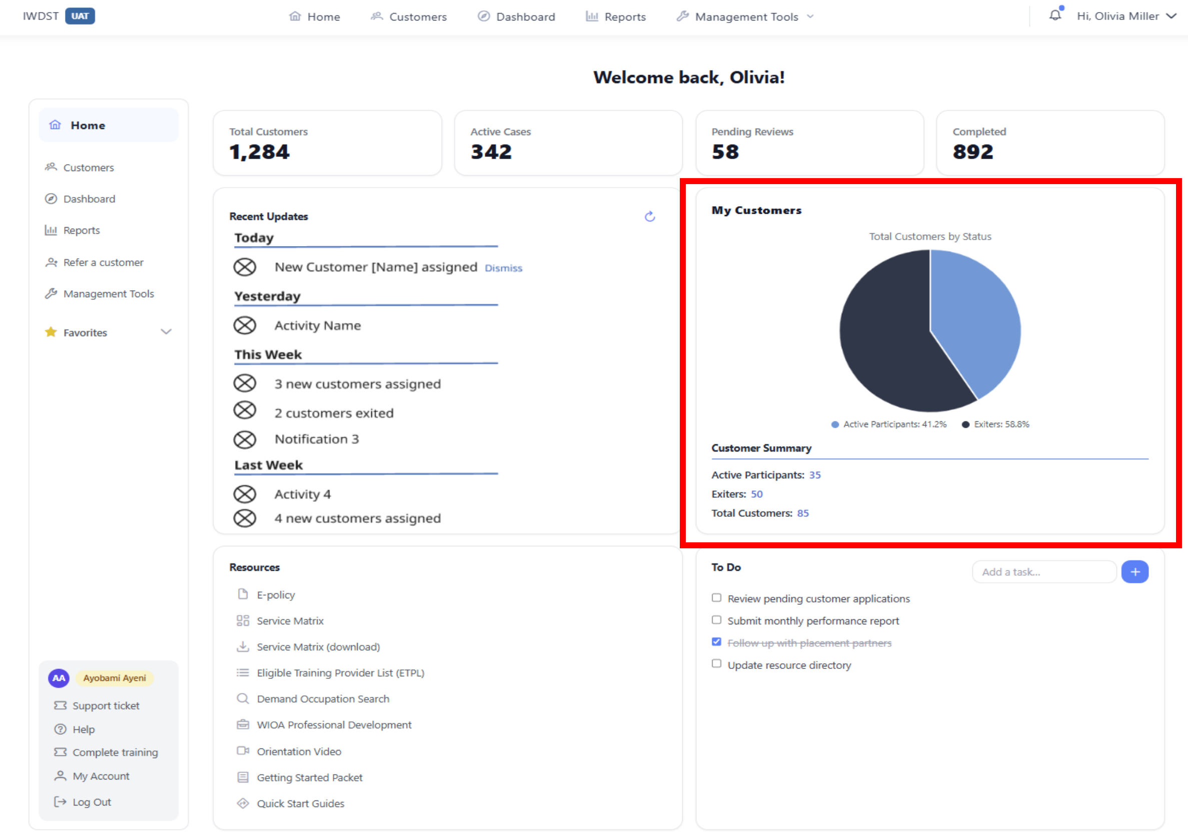

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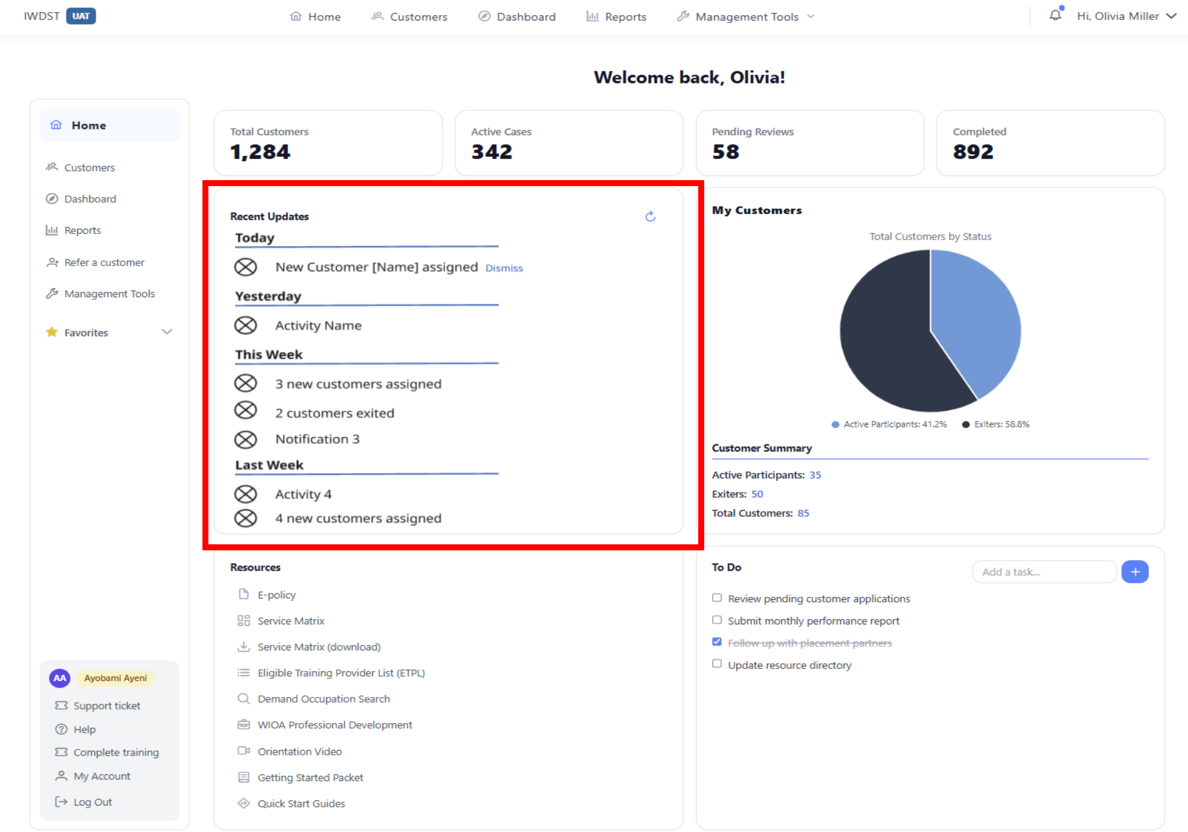

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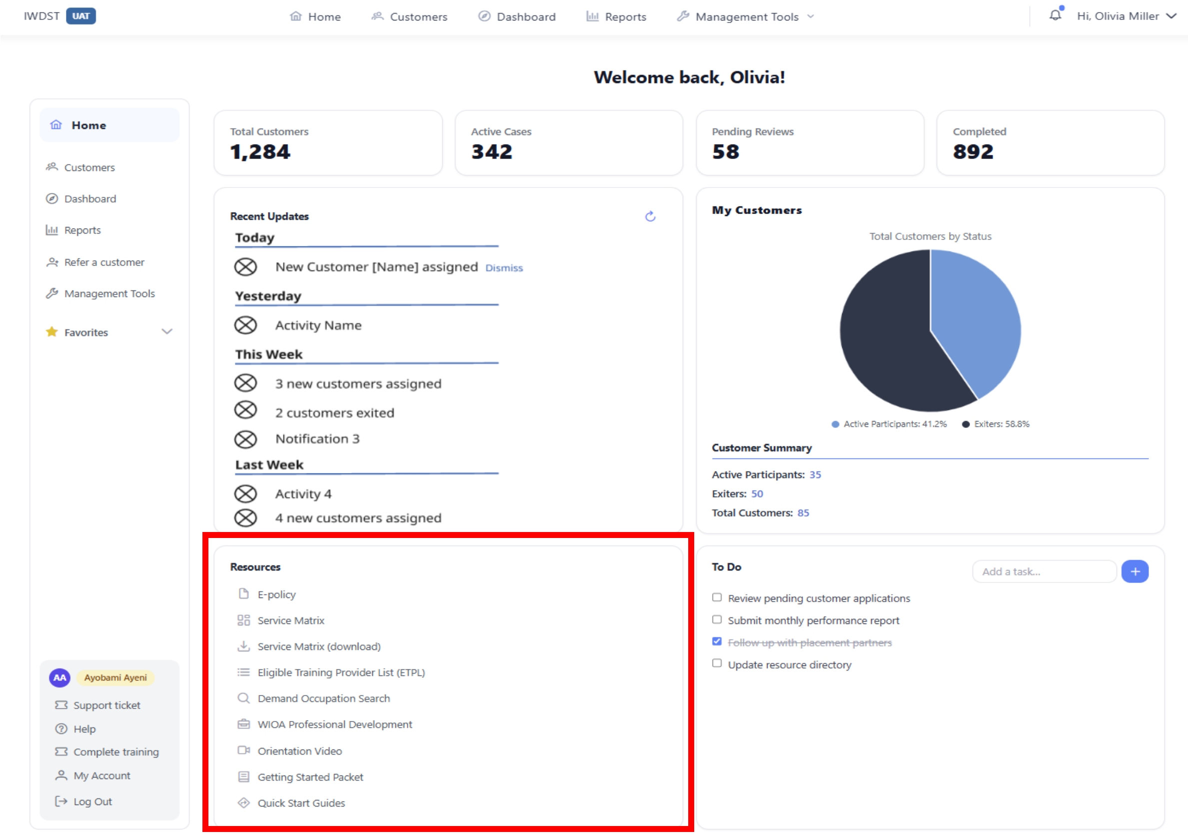

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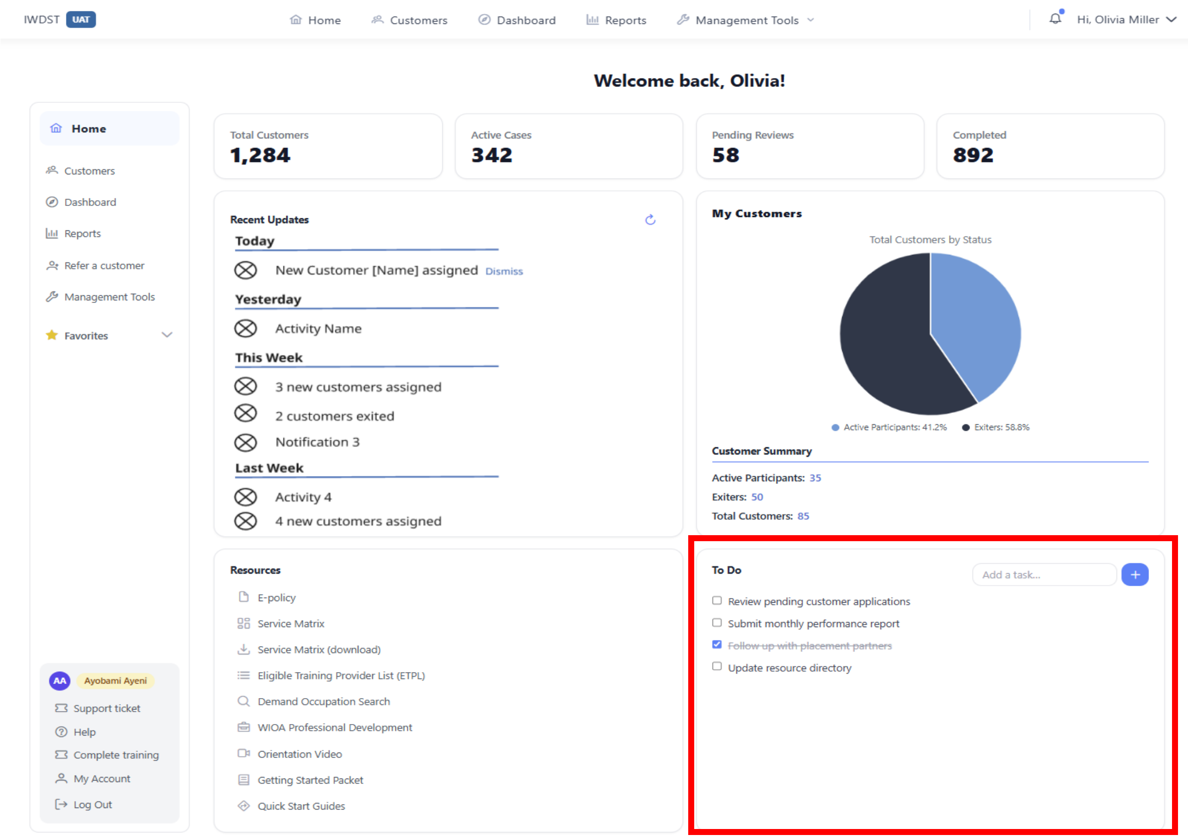


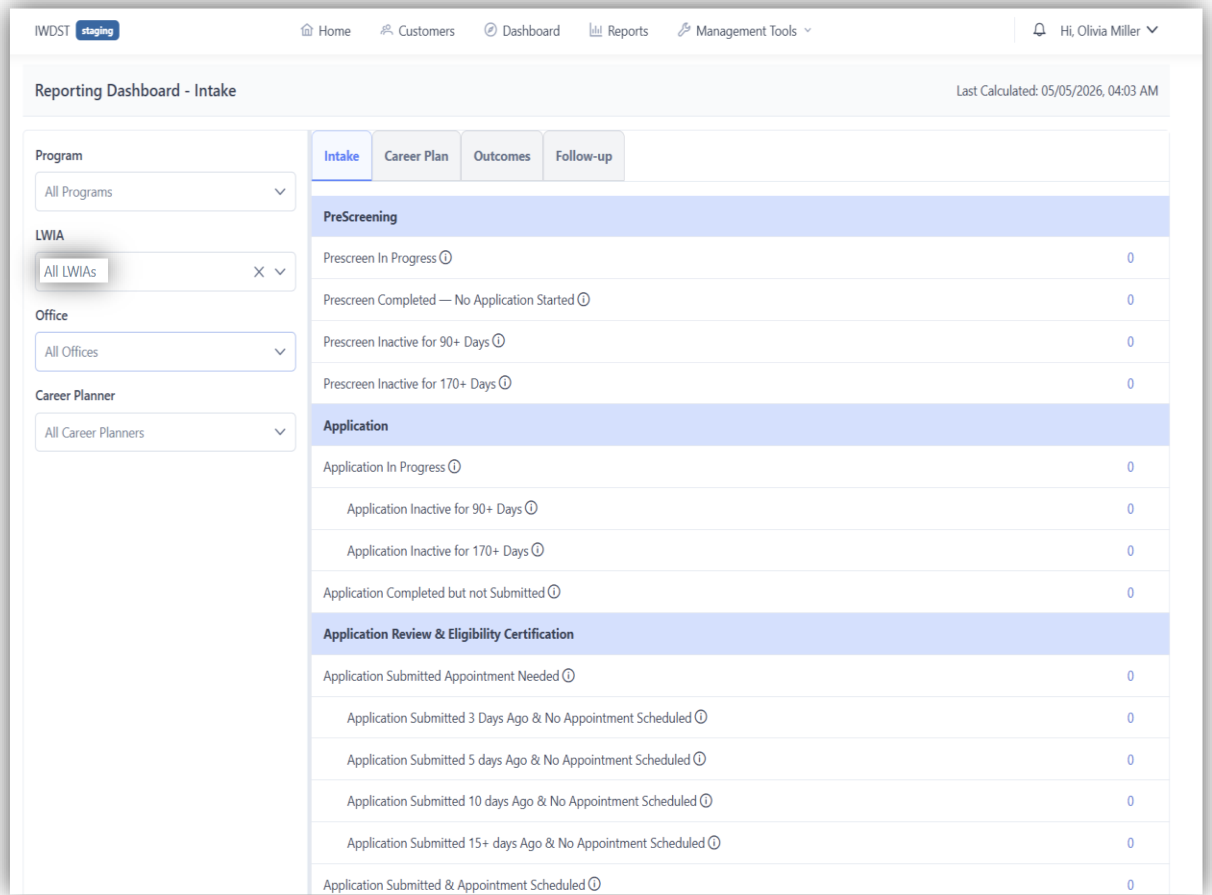
Dashboard: Track Customers & Spot Attention Areas

Tack customers through:

- Intake,
- Career Planning,
- Documenting outcomes, and
- Exits/Follow-Up

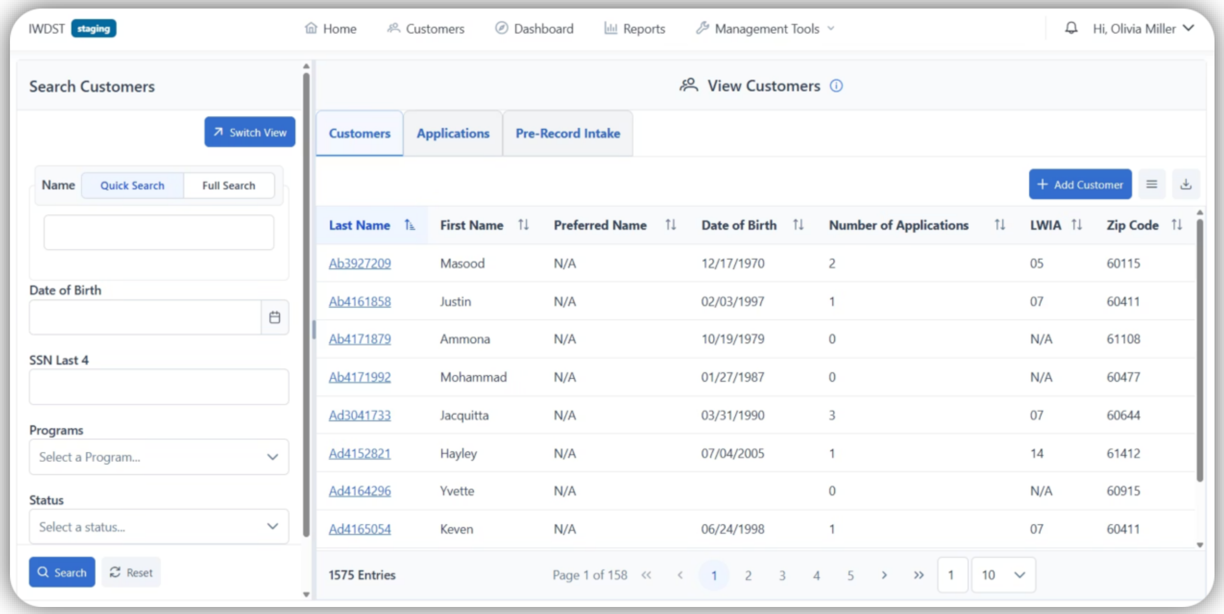
Real-time reporting (on a schedule)

Click counts to see customers



Customer Lists: Customers

The **Customers tab** is your primary tool for locating any individual in the system. Each customer appears only once, making it the cleanest, most reliable way to search.



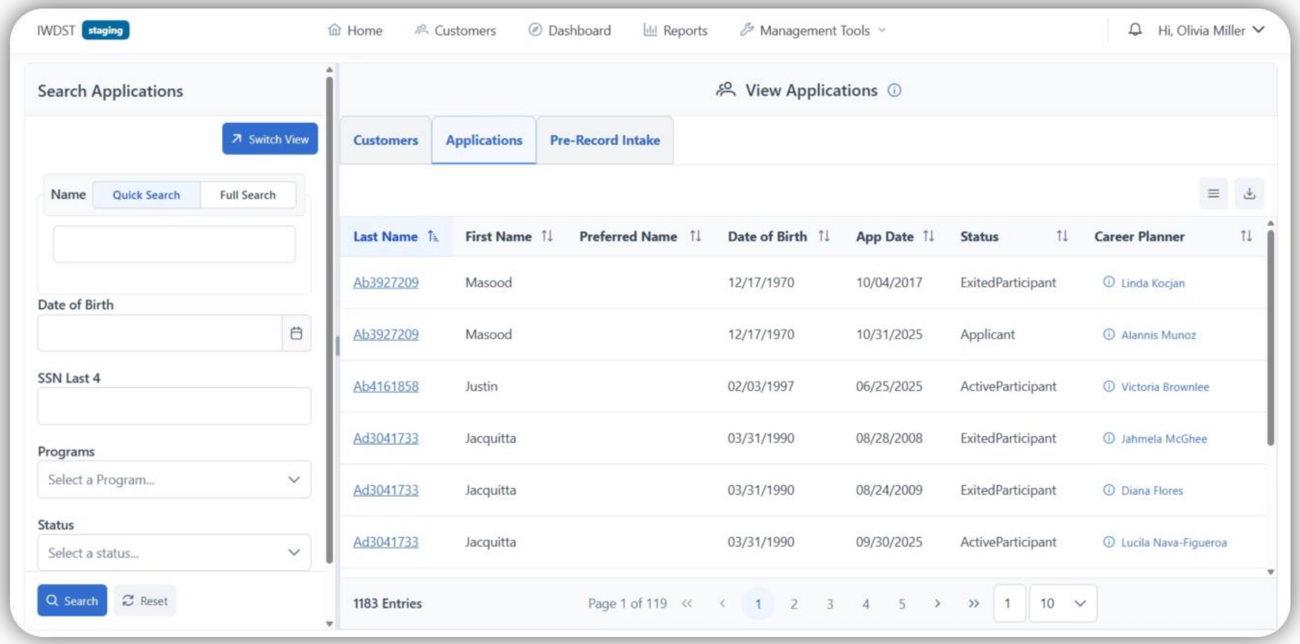
Full, Non-Duplicative Customer List

One Row Per Customer

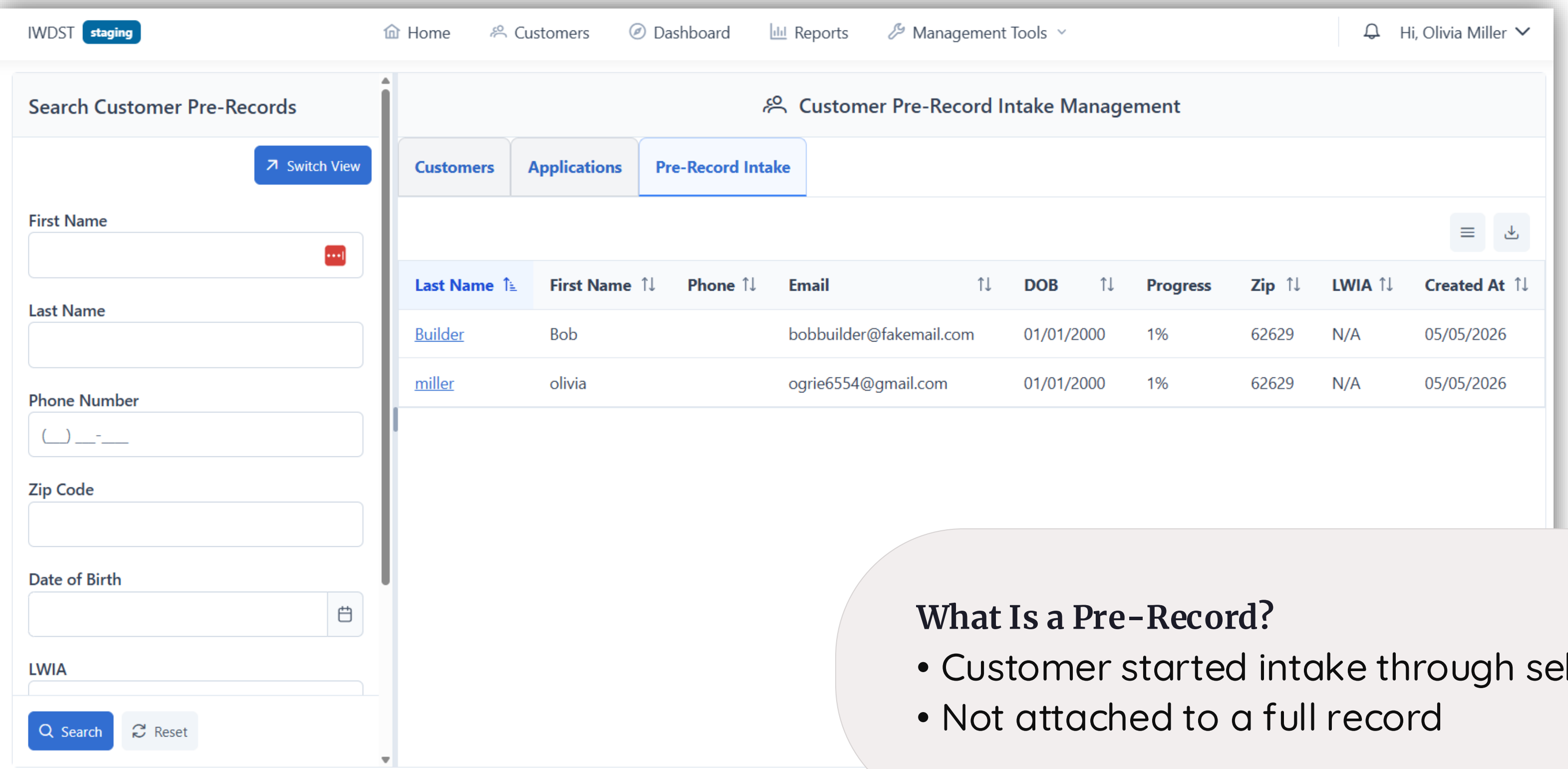
Best Place to Find Someone

Customer Lists: Applications

- Lists applications, not people
- Same person may appear multiple times
- Each row = one application



Customer Lists: Pre-Records

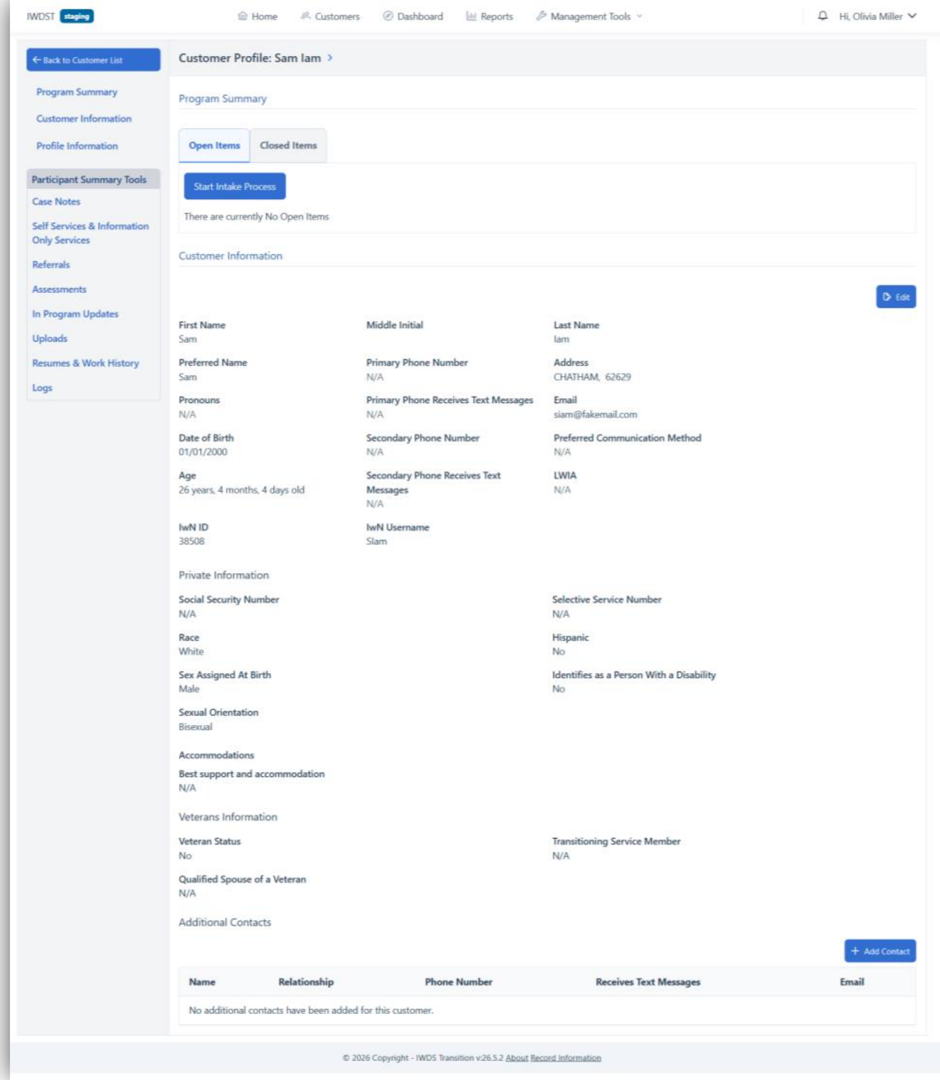


What Is a Pre-Record?

- Customer started intake through self-service
- Not attached to a full record

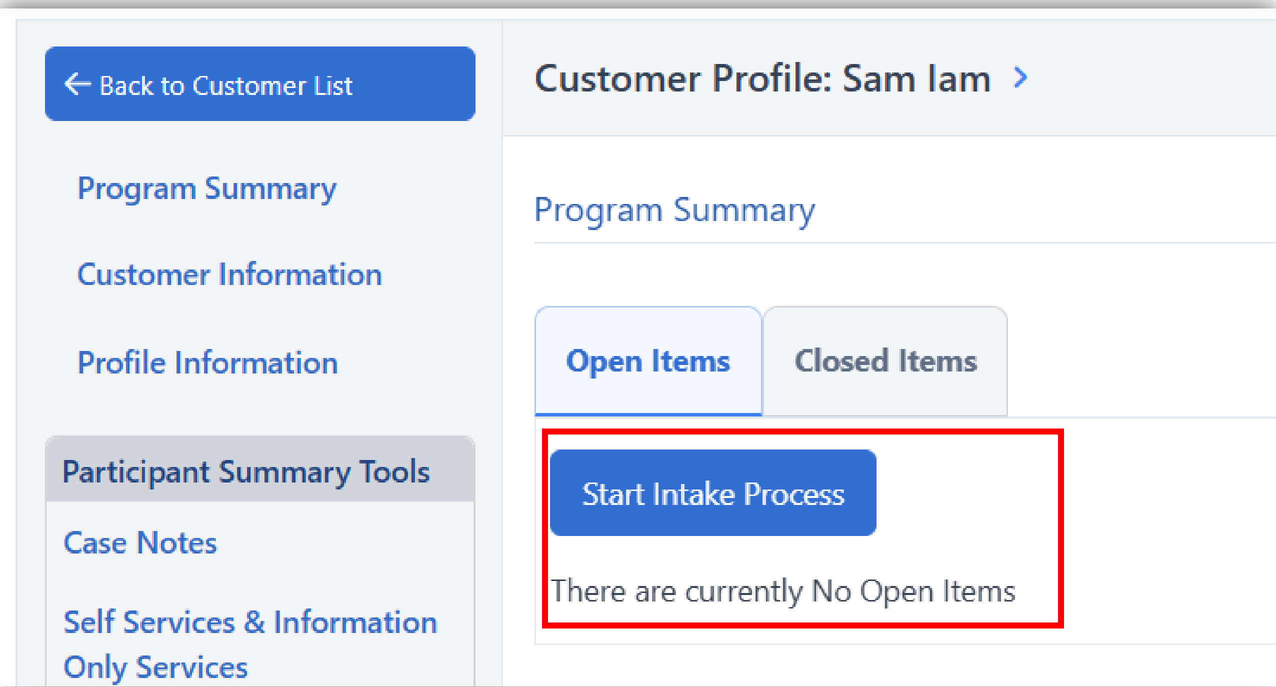
Customer Profile

- Intake summary
- Customer Information
- Private Information
- Veteran Information
- Additional contacts



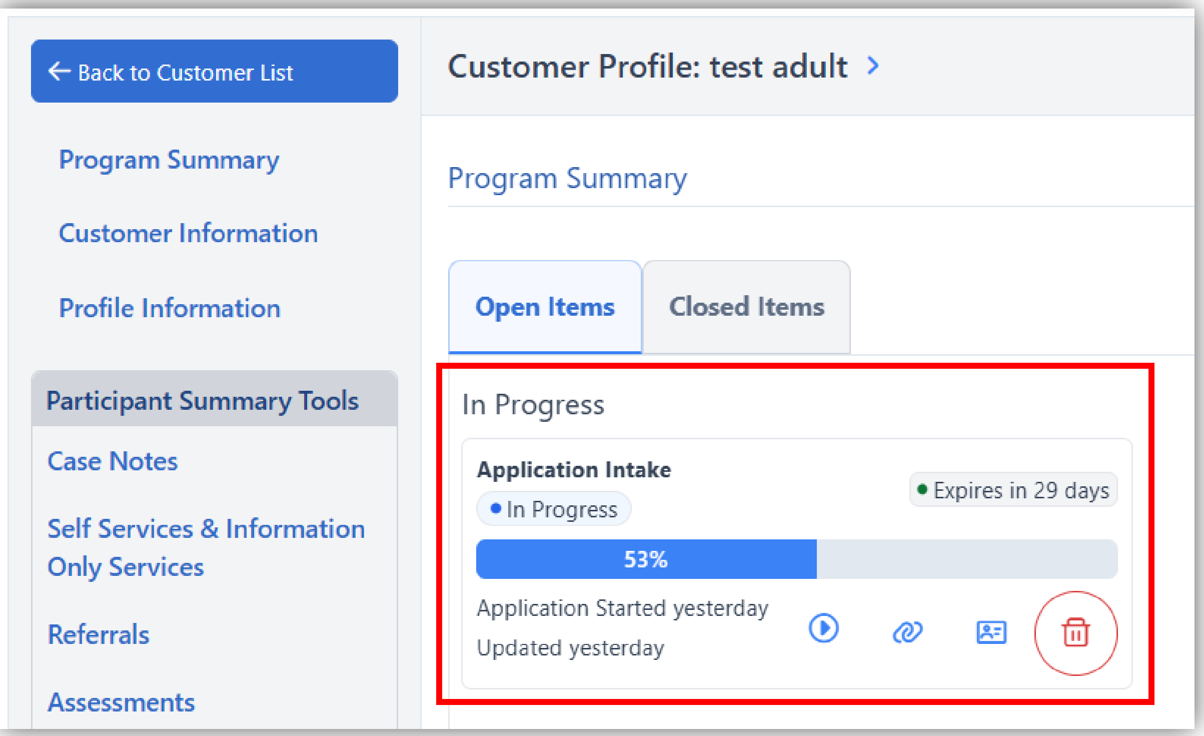
Customer Profile: Program Summary Status

Intake Not Started



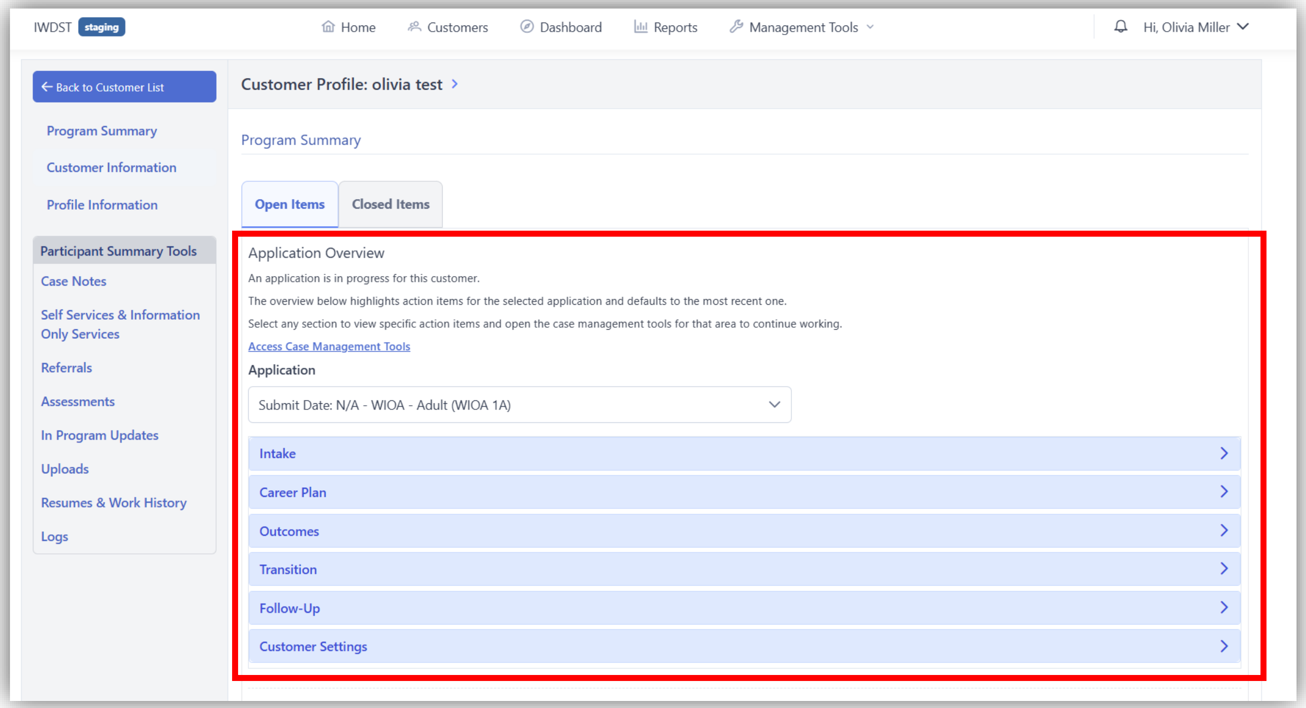
Customer Profile: Program Summary Status

Intake In Progress



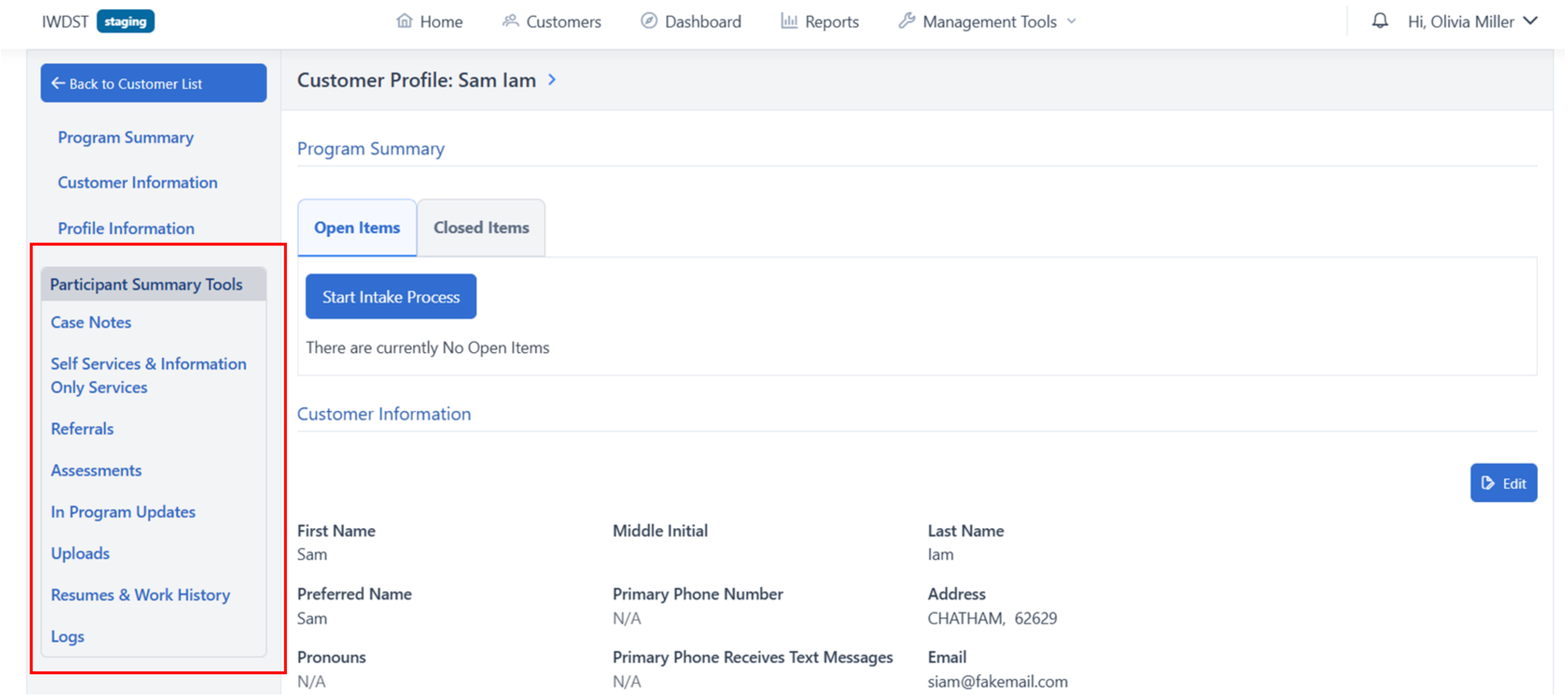
Customer Profile: Program Summary Status

Submitted Application



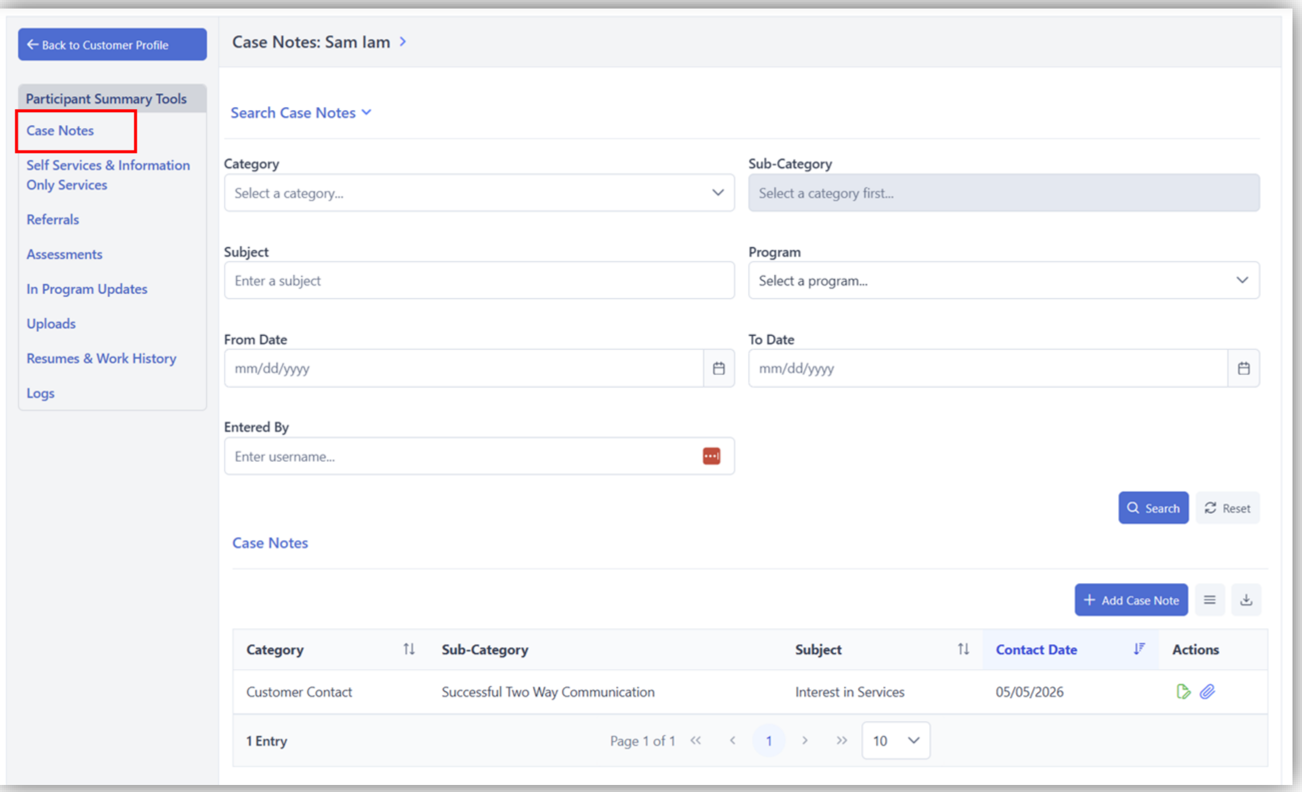
Customer Profile- Participant Summary Tools

Quick access to universal tools to support the customer



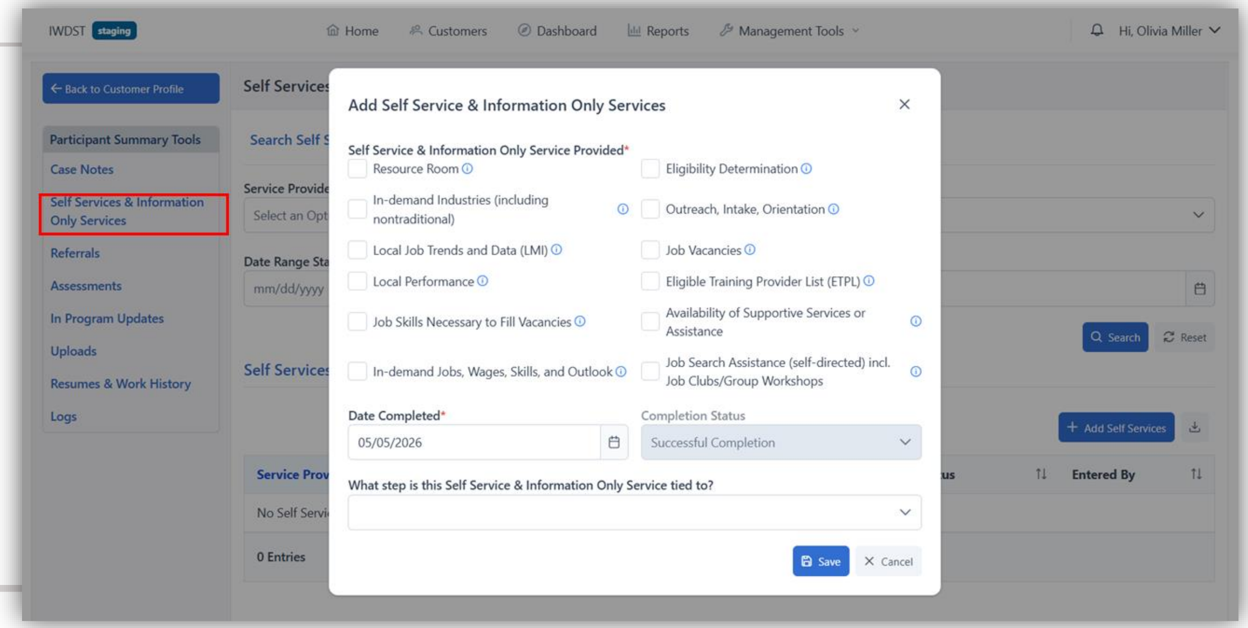
Case Notes – Participant Summary Tools

- View all case notes together
- Add notes as you work
- Filter to find what you need



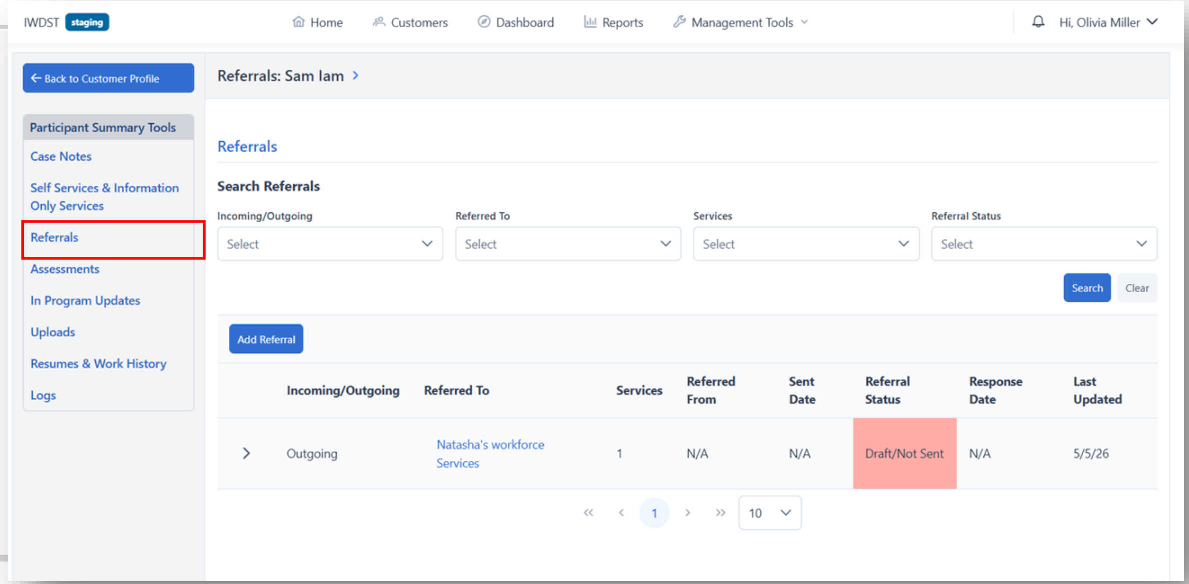
Participant Summary Tools: Self & Info Services

- Quickly add self or info only services
- Tie to a career plan if one has been started
- See a full listing of self or info services provided



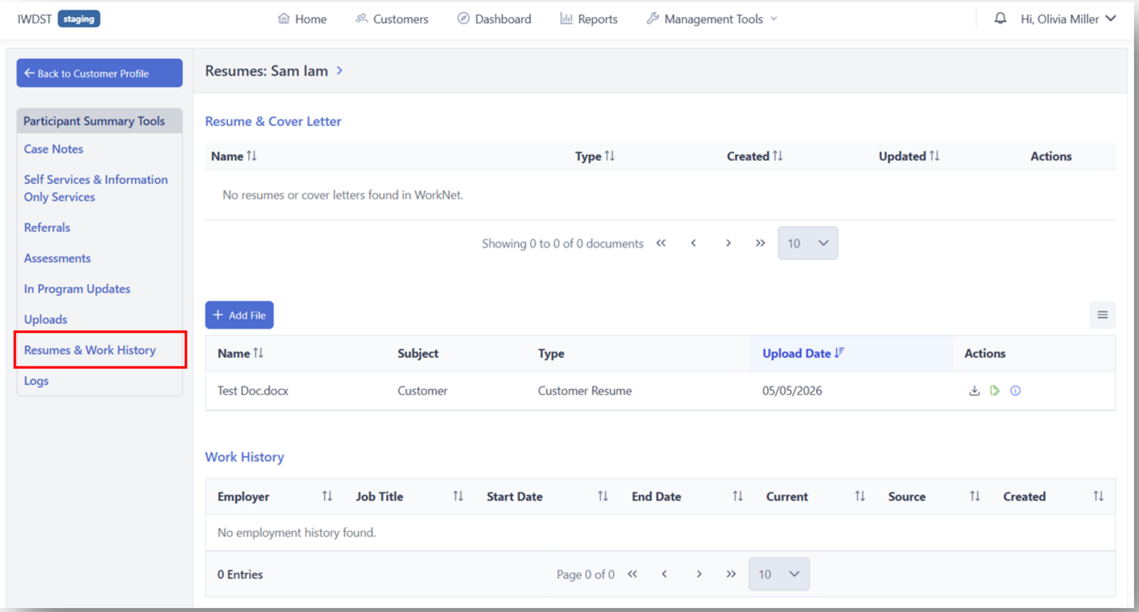
Participant Summary Tools: Referrals

- Powered by the IwN universal referral system
- Manage referrals for non-enrolled customers
- View sent and received referrals



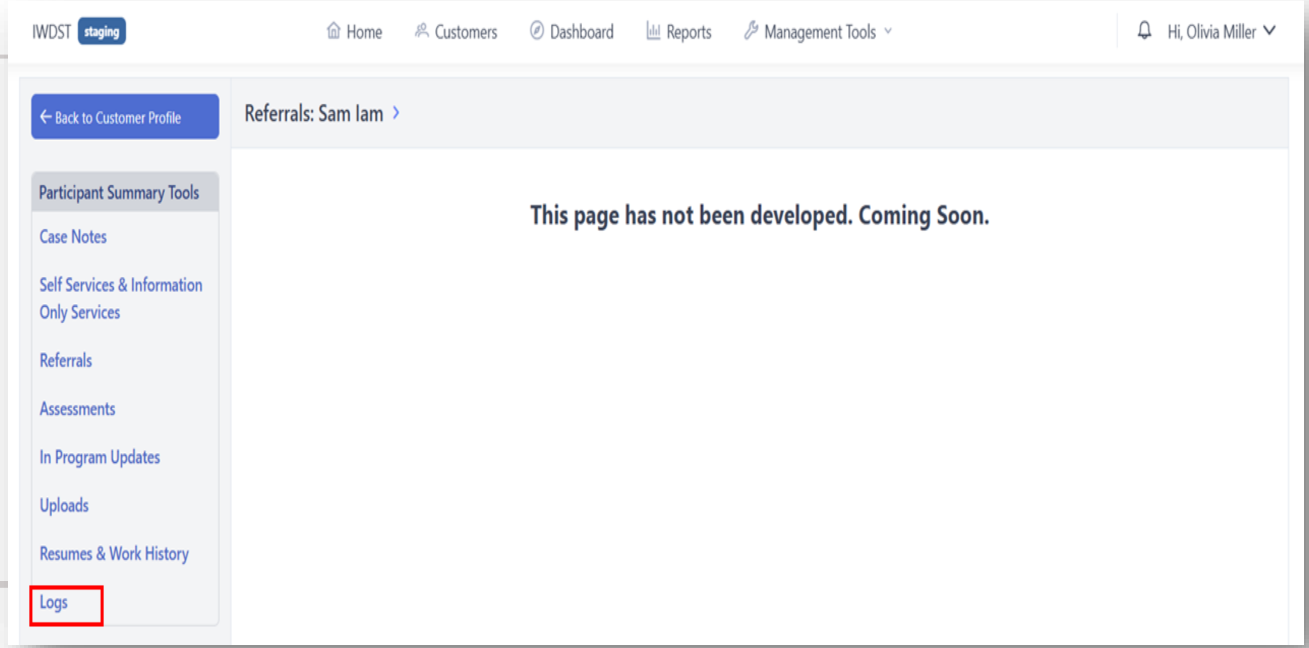
Participant Summary Tools: Resume & Work History

- Pulls in resumes saved to a customer IwN profile
- Provides a space to upload resumes
- Pull work history entered by customer or input into the Getting Started Assessment



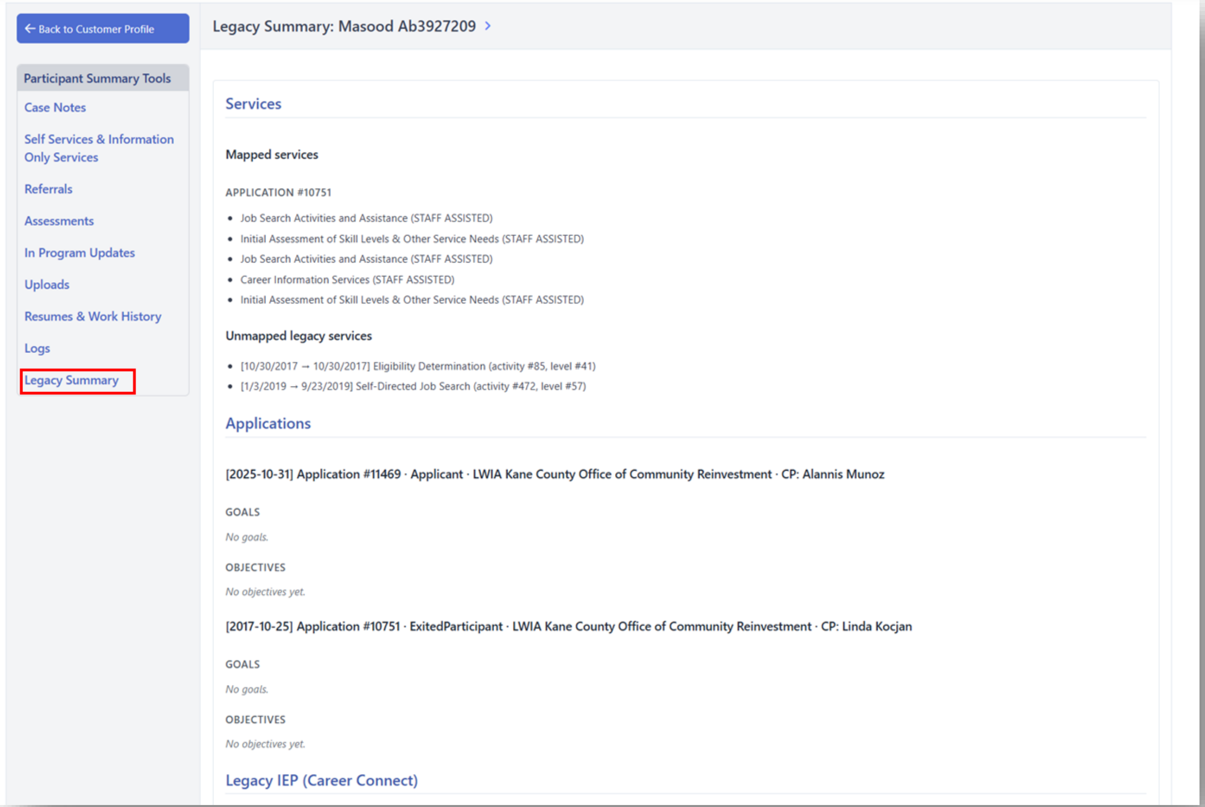
Participant Summary Tools – Logs

- Feature still under construction
- Central activity history
- See information added, changed, or deleted



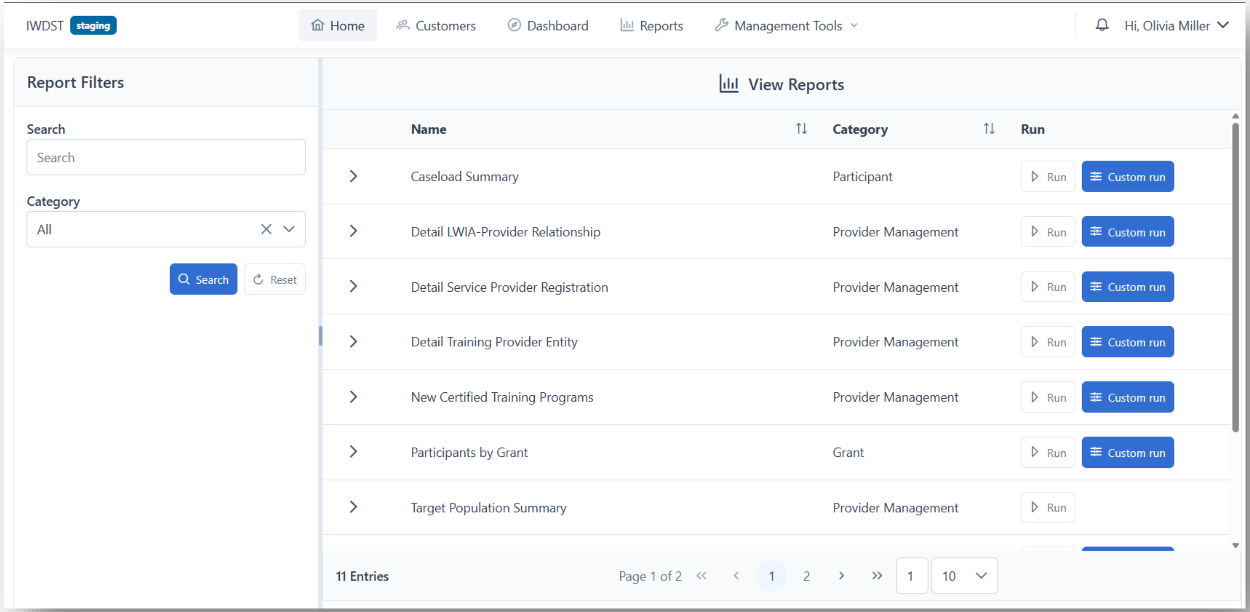
Participant Summary Tools – Legacy Summary

- Supports migrated customers by providing a summary of legacy system data
- Read only historical information



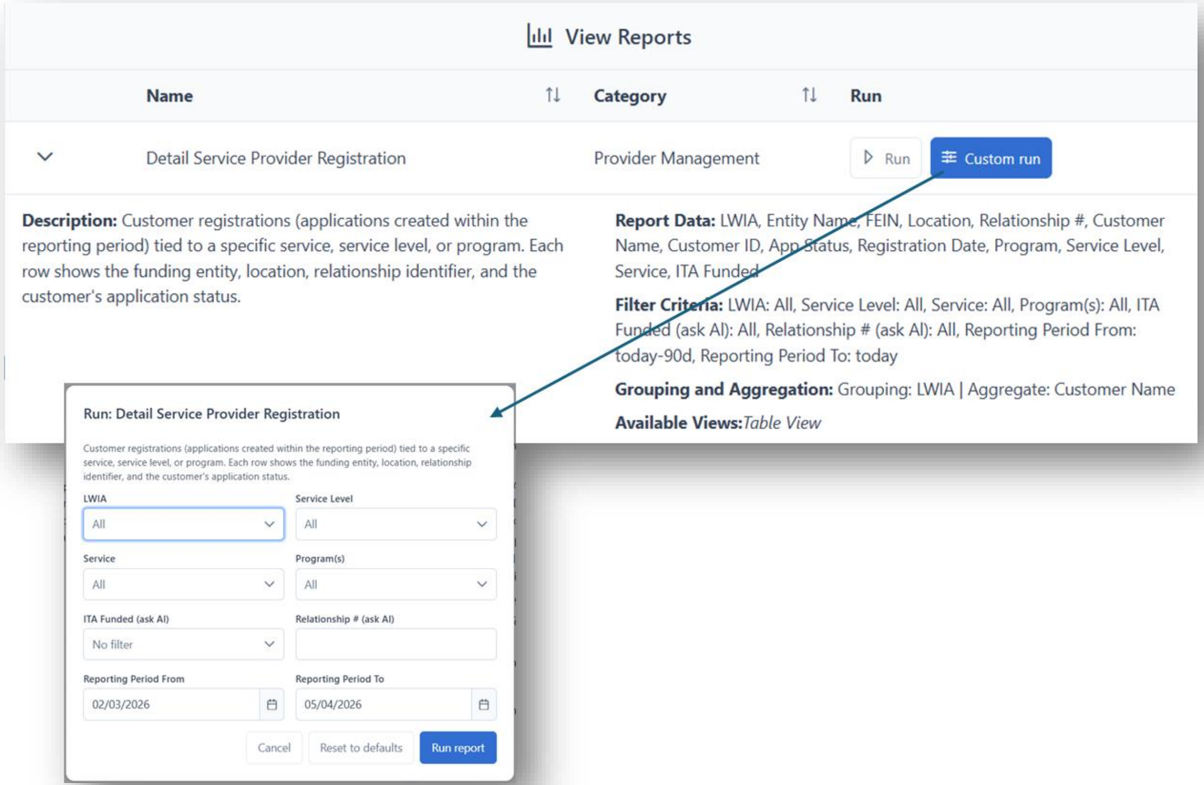
Reports – Finding What You Need

- All reports start on the Reports page
- Search on the left
- Report list on the right



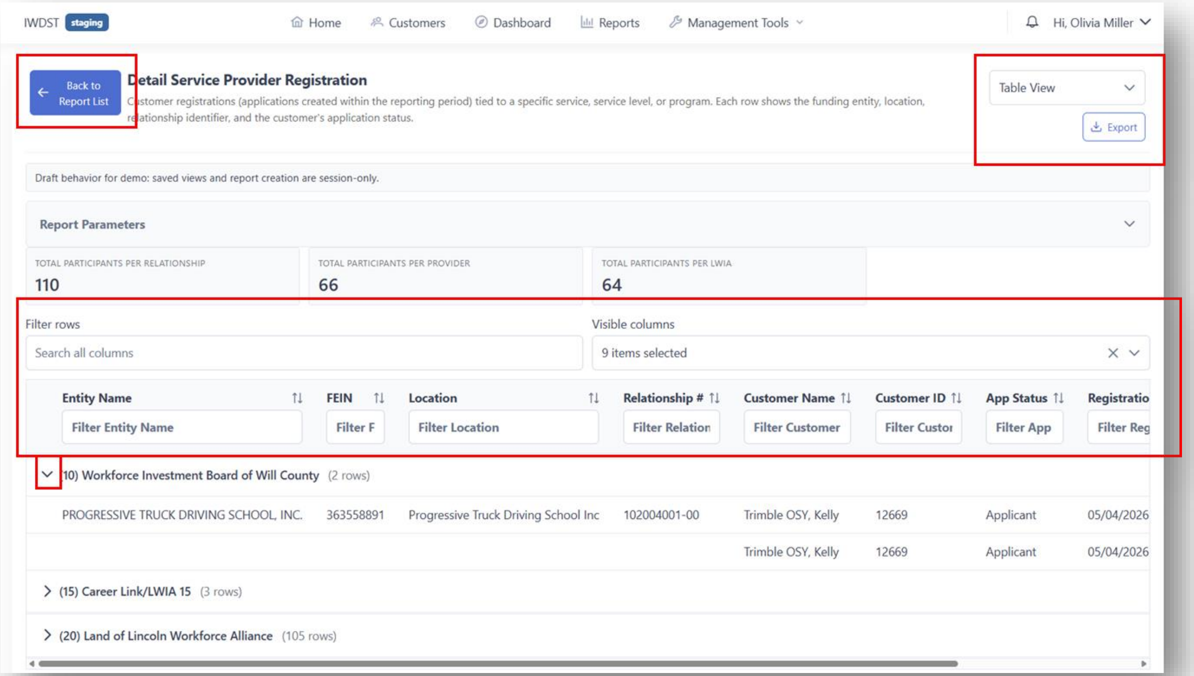
Reports – Understanding the List

- One row per report
- Expand for details
- Run or Custom Run



Reports – Using Reports

- Sort, filter, and adjust columns
- Expand groups to see details
- Change view and export data
- Easily return to reports list



Logging In: Knowing Your Path

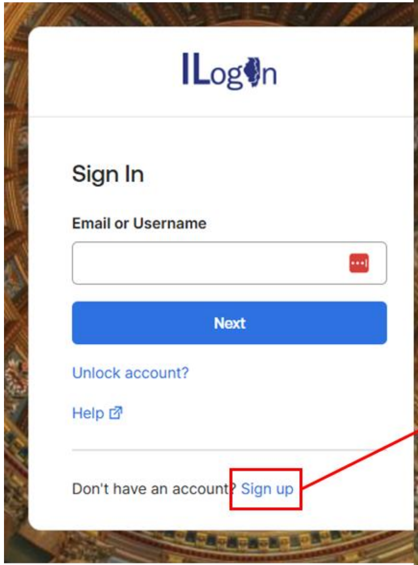
Access depends on your account type

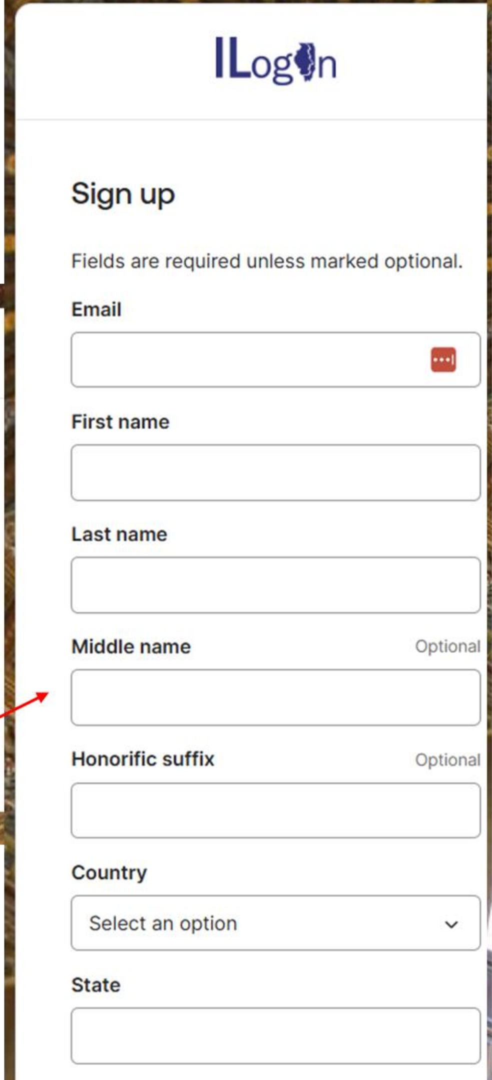
- Non-State Users (For most career planners at local organizations)
- State Users
- All users use 2-factor authentication (2FA)

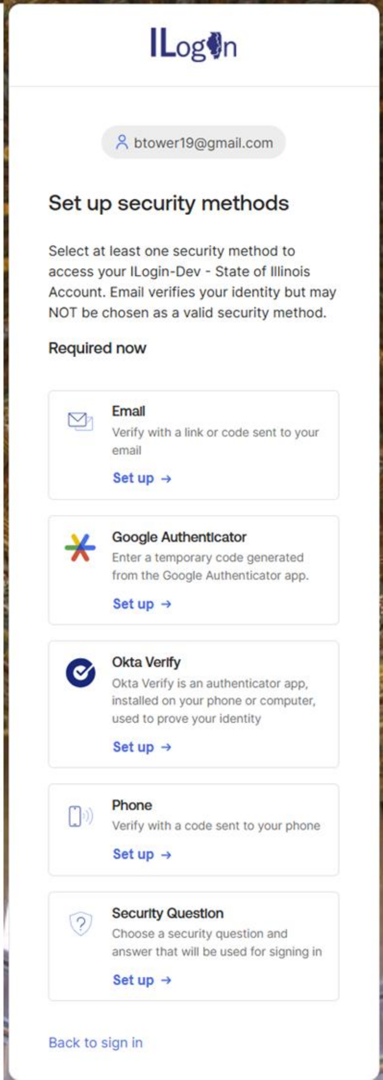
Logging In: Non-State Users

For individuals who do not have an Illinois.gov email

- Create an iLoginaccount though IWDS 2.0
- Set up 2FA
- Then log in to IWDS 2.0

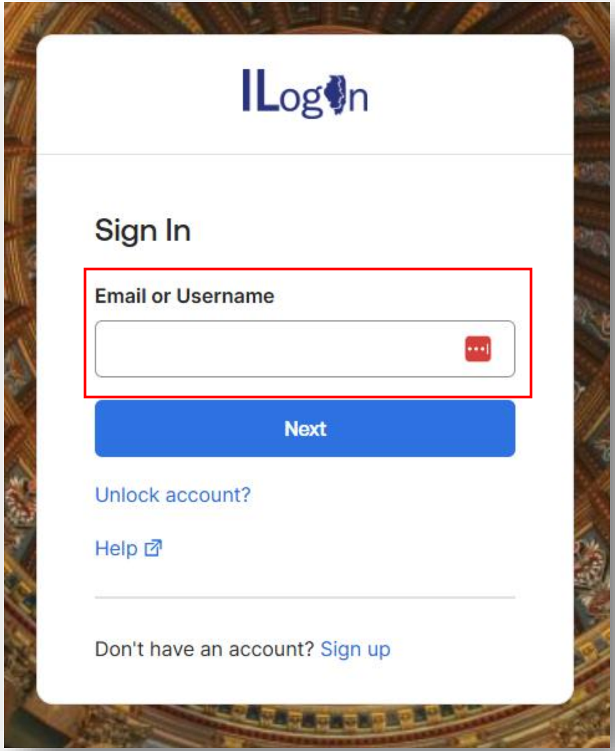






Logging In: State Users

- Illinois.gov users do **not** create anew account
- Access is connected by an Account Manager
- Help is available if issues come up



Logging In: Need Help?

?

Trouble logging in?

?

Questions about your account?

Help is available!
Contact Support at Illinois workNet Helpdesk at:

iwdst.info@illinoisworknet.com

Stay In Touch

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!