

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

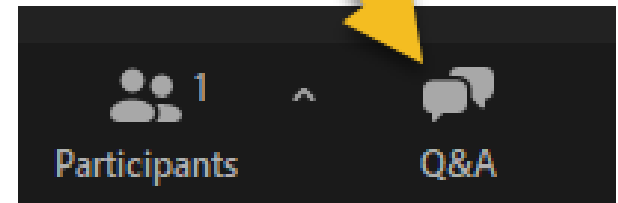
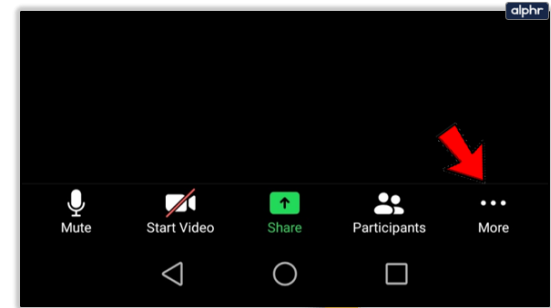
Engage Everyone

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.

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

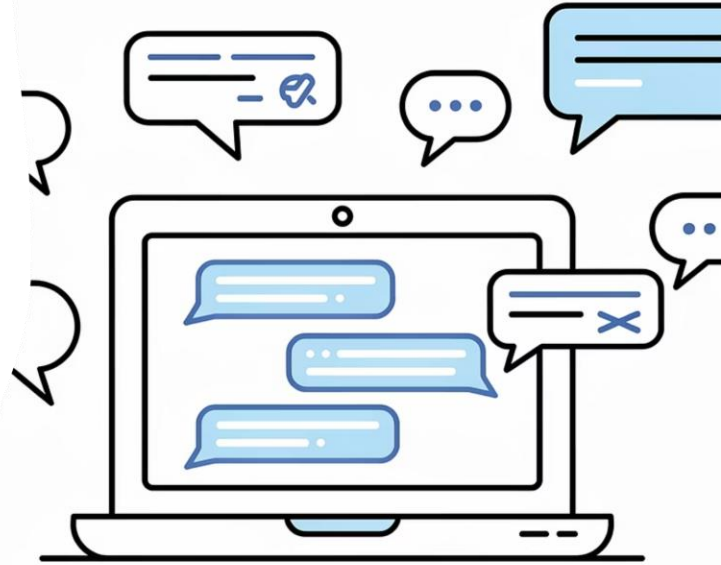
Introduce yourself so the group knows who's in the room today.

Your LWIA

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



What are you most excited to explore in IWDS 2.0?



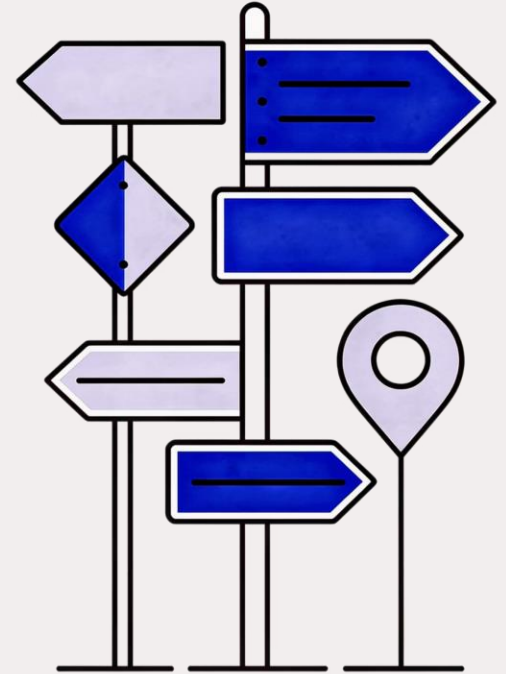
Microteach 6: Getting to Know the Case Management System

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

IWDST UAT

Home Customers Dashboard Reports Management Tools

Hi, Olivia Miller

Welcome back, Olivia!

Home

- Customers
- Dashboard
- Reports
- Refer a customer
- Management Tools
- Favorites

Total Customers
1,284

Active Cases
342

Pending Reviews
58

Completed
892

Recent Updates

Today

- New Customer [Name] assigned [Dismiss](#)

Yesterday

- Activity Name

This Week

- 3 new customers assigned
- 2 customers exited
- Notification 3

Last Week

- Activity 4
- 4 new customers assigned

My Customers

Total Customers by Status

● Active Participants: 41.2% ● Exitters: 58.8%

Customer Summary

Active Participants: 35
Exitters: 50
Total Customers: 85

Resources

- E-policy
- Service Matrix
- Service Matrix (download)
- Eligible Training Provider List (ETPL)
- Demand Occupation Search
- WIOA Professional Development
- Orientation Video
- Getting Started Packet
- Quick Start Guides

To Do

Add a task...

- Review pending customer applications
- Submit monthly performance report
- Follow-up with placement partners
- Update resource directory

The Home Page: Understanding Your Caseload

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

The screenshot displays a dashboard interface for a user named Olivia Miller. The top navigation bar includes links for Home, Customers, Dashboard, Reports, and Management Tools. A welcome message "Welcome back, Olivia!" is prominently displayed. Below this, a row of four summary tiles is highlighted with a red box, showing: Total Customers (1,284), Active Cases (342), Pending Reviews (58), and Completed (892). The main content area is divided into several sections: "Recent Updates" with a list of activities from Today, Yesterday, This Week, and Last Week; "My Customers" featuring a pie chart titled "Total Customers by Status" showing 41.2% Active Participants and 58.8% Exiters, along with a "Customer Summary" table; "Resources" listing various documents and guides; and a "To Do" list with a task input field and a plus button.

WDST UAT Home Customers Dashboard Reports Management Tools Hi, Olivia Miller

Welcome back, Olivia!

Total Customers **1,284** Active Cases **342** Pending Reviews **58** Completed **892**

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Welcome back, Olivia!

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My Customers

Total Customers by Status

Status	Percentage
Active Participants	41.2%
Exiters	58.8%

Customer Summary

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Add a task...

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AA Ayobami Ayeni

- Support ticket
- Help
- Complete training
- My Account
- Log Out

The Home Page: Understanding Your Caseload

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

The dashboard is titled "Welcome back, Olivia!". It features a navigation bar with "Home", "Customers", "Dashboard", "Reports", and "Management Tools". A user profile "Hi, Olivia Miller" is in the top right.

Summary Tiles:

- Total Customers: **1,284**
- Active Cases: **342**
- Pending Reviews: **58**
- Completed: **892**

Recent Updates (highlighted in red):

- Today**
 - ⊗ New Customer [Name] assigned [Dismiss](#)
- Yesterday**
 - ⊗ Activity Name
- This Week**
 - ⊗ 3 new customers assigned
 - ⊗ 2 customers exited
 - ⊗ Notification 3
- Last Week**
 - ⊗ Activity 4
 - ⊗ 4 new customers assigned

My Customers: A pie chart titled "Total Customers by Status" shows "Active Participants: 41.2%" (blue) and "Exiters: 58.8%" (dark blue).

Customer Summary:

- Active Participants: 35
- Exiters: 50
- Total Customers: 85

Resources:

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To Do:

- Review pending customer applications
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- Update resource directory

A "Personal To Do list" is visible in the bottom left, including "Support ticket", "Help", "Complete training", "My Account", and "Log Out".

The Home Page: Understanding Your Caseload

- Summary tiles
- My Customers panel
- Recent Updates
- Resources in one place
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The Home Page: Understanding Your Caseload

- Summary tiles
- My Customers panel
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The dashboard home page for 'IW DST UAT' features a navigation bar with links for Home, Customers, Dashboard, Reports, and Management Tools. A user profile for 'Hi, Olivia Miller' is visible in the top right. The main content area is titled 'Welcome back, Olivia!' and includes a sidebar with navigation options like Home, Customers, Dashboard, Reports, Refer a customer, Management Tools, and Favorites. The central area contains several summary tiles: 'Total Customers' (1,284), 'Active Cases' (342), 'Pending Reviews' (58), and 'Completed' (892). Below these are sections for 'Recent Updates' (Today, Yesterday, This Week, Last Week) and 'My Customers' (Total Customers by Status pie chart, Customer Summary). A 'Resources' section lists various tools like E-policy, Service Matrix, and Demand Occupation Search. A 'To Do' list is highlighted with a red border, containing tasks such as 'Review pending customer applications', 'Submit monthly performance report', 'Follow-up with placement partners', and 'Update resource directory'.

Summary Tiles:

- Total Customers: 1,284
- Active Cases: 342
- Pending Reviews: 58
- Completed: 892

Recent Updates:

- Today:** New Customer [Name] assigned
- Yesterday:** Activity Name
- This Week:** 3 new customers assigned, 2 customers exited, Notification 3
- Last Week:** Activity 4, 4 new customers assigned

My Customers:

Total Customers by Status

● Active Participants: 41.2% ● Exitors: 58.8%

Customer Summary:

- Active Participants: 35
- Exitors: 50
- Total Customers: 85

Resources:

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To Do:

- Review pending customer applications
- Submit monthly performance report
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- Update resource directory

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

Reporting Dashboard - Intake Last Calculated: 05/05/2026, 04:03 AM

Program: All Programs

LWIA: All LWIAs

Office: All Offices

Career Planner: All Career Planners

	Intake	Career Plan	Outcomes	Follow-up
PreScreening				
Prescreen In Progress	0			
Prescreen Completed — No Application Started	0			
Prescreen Inactive for 90+ Days	0			
Prescreen Inactive for 170+ Days	0			
Application				
Application In Progress	0			
Application Inactive for 90+ Days	0			
Application Inactive for 170+ Days	0			
Application Completed but not Submitted	0			
Application Review & Eligibility Certification				
Application Submitted Appointment Needed	0			
Application Submitted 3 Days Ago & No Appointment Scheduled	0			
Application Submitted 5 days Ago & No Appointment Scheduled	0			
Application Submitted 10 days Ago & No Appointment Scheduled	0			
Application Submitted 15+ days Ago & No Appointment Scheduled	0			
Application Submitted & Appointment Scheduled	0			

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.

The screenshot displays the 'View Customers' interface in the IWDST system. The top navigation bar includes 'Home', 'Customers', 'Dashboard', 'Reports', and 'Management Tools'. The user is identified as 'Hi, Olivia Miller'. The main content area is titled 'View Customers' and features three tabs: 'Customers', 'Applications', and 'Pre-Record Intake'. A search sidebar on the left allows filtering by Name (Quick Search or Full Search), Date of Birth, SSN Last 4, Programs, and Status. The main table lists customer records with columns for Last Name, First Name, Preferred Name, Date of Birth, Number of Applications, LWIA, and Zip Code. The table shows 1575 entries and includes a pagination control at the bottom.

Last Name	First Name	Preferred Name	Date of Birth	Number of Applications	LWIA	Zip Code
Ab3927209	Masood	N/A	12/17/1970	2	05	60115
Ab4161858	Justin	N/A	02/03/1997	1	07	60411
Ab4171879	Ammona	N/A	10/19/1979	0	N/A	61108
Ab4171992	Mohammad	N/A	01/27/1987	0	N/A	60477
Ad3041733	Jacquitta	N/A	03/31/1990	3	07	60644
Ad4152821	Hayley	N/A	07/04/2005	1	14	61412
Ad4164296	Yvette	N/A		0	N/A	60915
Ad4165054	Keven	N/A	06/24/1998	1	07	60411

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

The screenshot displays the 'View Applications' page in the IWDST staging environment. The interface includes a search sidebar on the left and a main table of application records. The sidebar contains search filters for Name (Quick Search and Full Search), Date of Birth, SSN Last 4, Programs, and Status. The main table has columns for Last Name, First Name, Preferred Name, Date of Birth, App Date, Status, and Career Planner. The table shows six rows of application data for various customers. The bottom of the page indicates 1183 entries and provides pagination controls.

Last Name	First Name	Preferred Name	Date of Birth	App Date	Status	Career Planner
Ab3927209	Masood		12/17/1970	10/04/2017	ExitedParticipant	Linda Kocjan
Ab3927209	Masood		12/17/1970	10/31/2025	Applicant	Alannis Munoz
Ab4161858	Justin		02/03/1997	06/25/2025	ActiveParticipant	Victoria Brownlee
Ad3041733	Jacquitta		03/31/1990	08/28/2008	ExitedParticipant	Jahmela McGhee
Ad3041733	Jacquitta		03/31/1990	08/24/2009	ExitedParticipant	Diana Flores
Ad3041733	Jacquitta		03/31/1990	09/30/2025	ActiveParticipant	Lucia Nava-Figueroa

Customer Lists: Pre-Records

The screenshot shows a web application interface for "Customer Pre-Record Intake Management". The top navigation bar includes "IWDST staging", "Home", "Customers", "Dashboard", "Reports", and "Management Tools". The user is logged in as "Hi, Olivia Miller".

The main content area is titled "Customer Pre-Record Intake Management" and has three tabs: "Customers", "Applications", and "Pre-Record Intake". The "Pre-Record Intake" tab is active, displaying a table of customer records. The table has columns for "Last Name", "First Name", "Phone", "Email", "DOB", "Progress", "Zip", "LWIA", and "Created At".

On the left, there is a search sidebar titled "Search Customer Pre-Records" with a "Switch View" button and input fields for "First Name", "Last Name", "Phone Number", "Zip Code", "Date of Birth", and "LWIA". A "Search" button and a "Reset" button are at the bottom of the sidebar.

The table contains the following data:

Last Name	First Name	Phone	Email	DOB	Progress	Zip	LWIA	Created At
Builder	Bob		bobbuilder@fakemail.com	01/01/2000	1%	62629	N/A	05/05/2026
miller	olivia		ogrie6554@gmail.com	01/01/2000	1%	62629	N/A	05/05/2026

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: Sam Iam

Program Summary

Open Items Closed Items

Start Intake Process

There are currently No Open Items

Customer Information

First Name Sam	Middle Initial N/A	Last Name Iam
Preferred Name Sam	Primary Phone Number N/A	Address CHATHAM, 62629
Pronouns N/A	Primary Phone Receives Text Messages N/A	Email siam@lakemail.com
Date of Birth 01/01/2000	Secondary Phone Number N/A	Preferred Communication Method N/A
Age 26 years, 4 months, 4 days old	Secondary Phone Receives Text Messages N/A	LWMA N/A
IwN ID 38508	IwN Username Slam	

Private Information

Social Security Number N/A	Selective Service Number N/A
Race White	Hispanic No
Sex Assigned At Birth Male	Identifies as a Person With a Disability No

Sexual Orientation
Bisexual

Accommodations

Best support and accommodation
N/A

Veterans Information

Veteran Status No	Transitioning Service Member N/A
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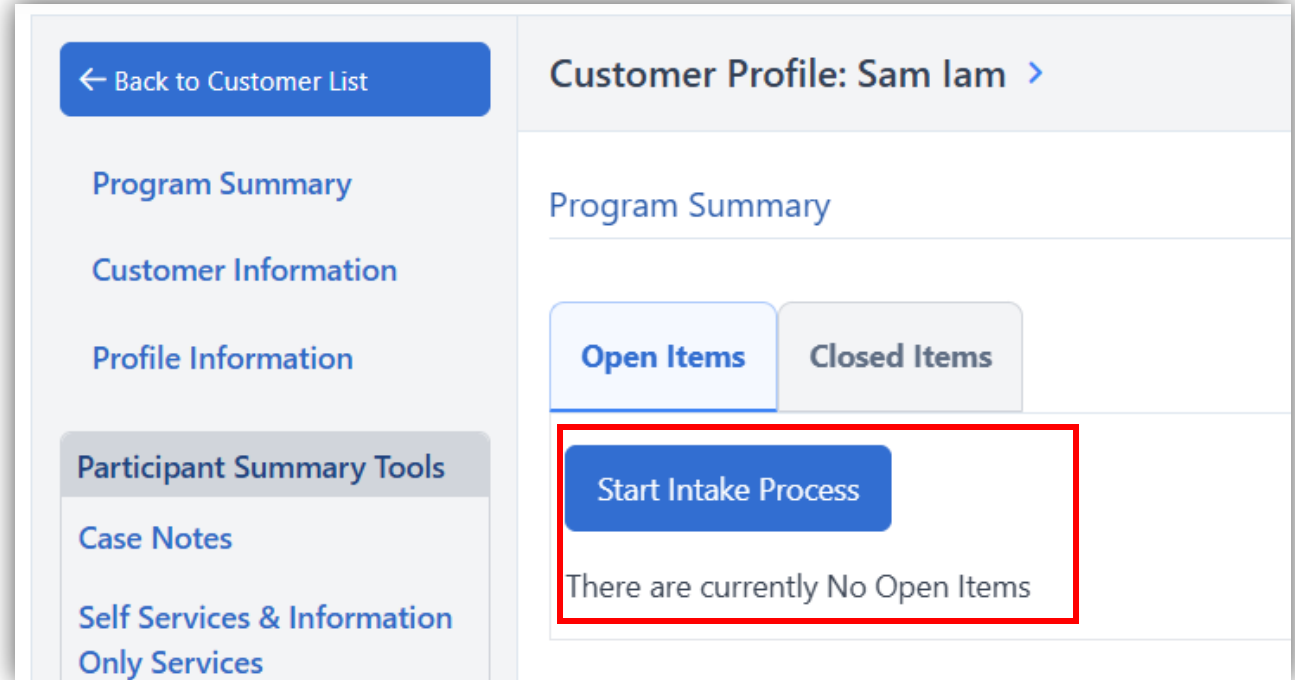
Qualified Spouse of a Veteran
N/A

Additional Contacts

Name	Relationship	Phone Number	Receives Text Messages	Email
No additional contacts have been added for this customer.				

Customer Profile: Program Summary Status

Intake Not Started



The screenshot displays a web interface for a customer profile. On the left is a navigation sidebar with a blue button '← Back to Customer List' at the top. Below it are menu items: 'Program Summary', 'Customer Information', 'Profile Information', 'Participant Summary Tools', 'Case Notes', 'Self Services & Information', and 'Only Services'. The main content area is titled 'Customer Profile: Sam lam >'. Underneath is a 'Program Summary' section with two tabs: 'Open Items' (active) and 'Closed Items'. A blue button labeled 'Start Intake Process' is highlighted with a red border. Below the button, the text reads 'There are currently No Open Items'.

← Back to Customer List

Customer Profile: Sam lam >

Program Summary

Open Items Closed Items

Start Intake Process

There are currently No Open Items

Customer Profile: Program Summary Status

Intake In Progress

The screenshot displays a web interface for a customer profile. On the left is a navigation sidebar with a blue button '← Back to Customer List' at the top. Below it are menu items: 'Program Summary', 'Customer Information', 'Profile Information', 'Participant Summary Tools' (highlighted), 'Case Notes', 'Self Services & Information Only Services', 'Referrals', and 'Assessments'. The main content area is titled 'Customer Profile: test adult >'. Underneath is a 'Program Summary' section with two tabs: 'Open Items' (active) and 'Closed Items'. A red box highlights the 'In Progress' section, which contains an 'Application Intake' card. This card shows a progress bar at 53%, a status of 'In Progress', and a timer 'Expires in 29 days'. Below the progress bar, it states 'Application Started yesterday' and 'Updated yesterday'. To the right of this text are four icons: a play button, a link icon, a calendar icon, and a trash can icon.

← Back to Customer List

Customer Profile: test adult >

Program Summary

Open Items Closed Items

In Progress

Application Intake Expires in 29 days

In Progress

53%

Application Started yesterday Updated yesterday

▶ 🔗 📅 🗑️

Customer Profile: Program Summary Status

IWDST **staging** Home Customers Dashboard Reports Management Tools Hi, Olivia Miller

[← Back to Customer List](#)

Customer Profile: olivia test

Program Summary

[Open Items](#) [Closed Items](#)

Application Overview

An application is in progress for this customer.
The overview below highlights action items for the selected application and defaults to the most recent one.
Select any section to view specific action items and open the case management tools for that area to continue working.
[Access Case Management Tools](#)

Application

Submit Date: N/A - WIOA - Adult (WIOA 1A)

- [Intake](#)
- [Career Plan](#)
- [Outcomes](#)
- [Transition](#)
- [Follow-Up](#)
- [Customer Settings](#)

Participant Summary Tools

- Case Notes
- Self Services & Information Only Services
- Referrals
- Assessments
- In Program Updates
- Uploads
- Resumes & Work History
- Logs

Submitted
Application

Customer Profile- Participant Summary Tools

Quick access to universal tools to support the customer

IWDST **staging** Home Customers Dashboard Reports Management Tools Hi, Olivia Miller

← Back to Customer List

Customer Profile: Sam lam >

Program Summary

Open Items Closed Items

Start Intake Process

There are currently No Open Items

Customer Information

Edit

First Name	Sam	Middle Initial		Last Name	lam
Preferred Name	Sam	Primary Phone Number	N/A	Address	CHATHAM, 62629
Pronouns	N/A	Primary Phone Receives Text Messages	N/A	Email	siam@fakemail.com

Case Notes – Participant Summary Tools

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

← Back to Customer Profile

Case Notes: Sam lam >

Participant Summary Tools

- Case Notes
- Self Services & Information Only Services
- Referrals
- Assessments
- In Program Updates
- Uploads
- Resumes & Work History
- Logs

Search Case Notes ▾

Category: Select a category... ▾

Sub-Category: Select a category first...

Subject: Enter a subject

Program: Select a program... ▾

From Date: mm/dd/yyyy

To Date: mm/dd/yyyy

Entered By: Enter username...

Search Reset

Case Notes

+ Add Case Note

Category	Sub-Category	Subject	Contact Date	Actions
Customer Contact	Successful Two Way Communication	Interest in Services	05/05/2026	

1 Entry

Page 1 of 1 << < 1 > >> 10 ▾

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

The screenshot displays the IWDST staging application interface. The main navigation bar includes 'Home', 'Customers', 'Dashboard', 'Reports', and 'Management Tools'. The user is logged in as 'Hi, Olivia Miller'. The left sidebar contains 'Participant Summary Tools' with a red box highlighting 'Self Services & Information Only Services'. The main content area shows a 'Self Services' section with a search bar and a list of service providers. A modal window titled 'Add Self Service & Information Only Services' is open, featuring a grid of checkboxes for various services such as 'Resource Room', 'Eligibility Determination', 'In-demand Industries', 'Outreach, Intake, Orientation', 'Local Job Trends and Data (LMI)', 'Job Vacancies', 'Local Performance', 'Eligible Training Provider List (ETPL)', 'Job Skills Necessary to Fill Vacancies', 'Availability of Supportive Services or Assistance', and 'In-demand Jobs, Wages, Skills, and Outlook', 'Job Search Assistance (self-directed) incl. Job Clubs/Group Workshops'. The modal also includes a 'Date Completed*' field with the value '05/05/2026', a 'Completion Status' dropdown set to 'Successful Completion', and a text field for 'What step is this Self Service & Information Only Service tied to?'. 'Save' and 'Cancel' buttons are at the bottom right of the modal.

Participant Summary Tools: Referrals

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

The screenshot displays the IWDST staging interface for the 'Referrals' section of a customer profile (Sam lam). The interface includes a navigation menu on the left, search filters, and a table of referral records.

Navigation Menu:

- Participant Summary Tools
 - Case Notes
 - Self Services & Information Only Services
 - Referrals** (highlighted with a red box)
 - Assessments
 - In Program Updates
 - Uploads
 - Resumes & Work History
 - Logs

Search Referrals:

Filters: Incoming/Outgoing (Select), Referred To (Select), Services (Select), Referral Status (Select)

Buttons: Search, Clear

Table:

Incoming/Outgoing	Referred To	Services	Referred From	Sent Date	Referral Status	Response Date	Last Updated
> Outgoing	Natasha's workforce Services	1	N/A	N/A	Draft/Not Sent	N/A	5/5/26

Page navigation: << < 1 > >> 10

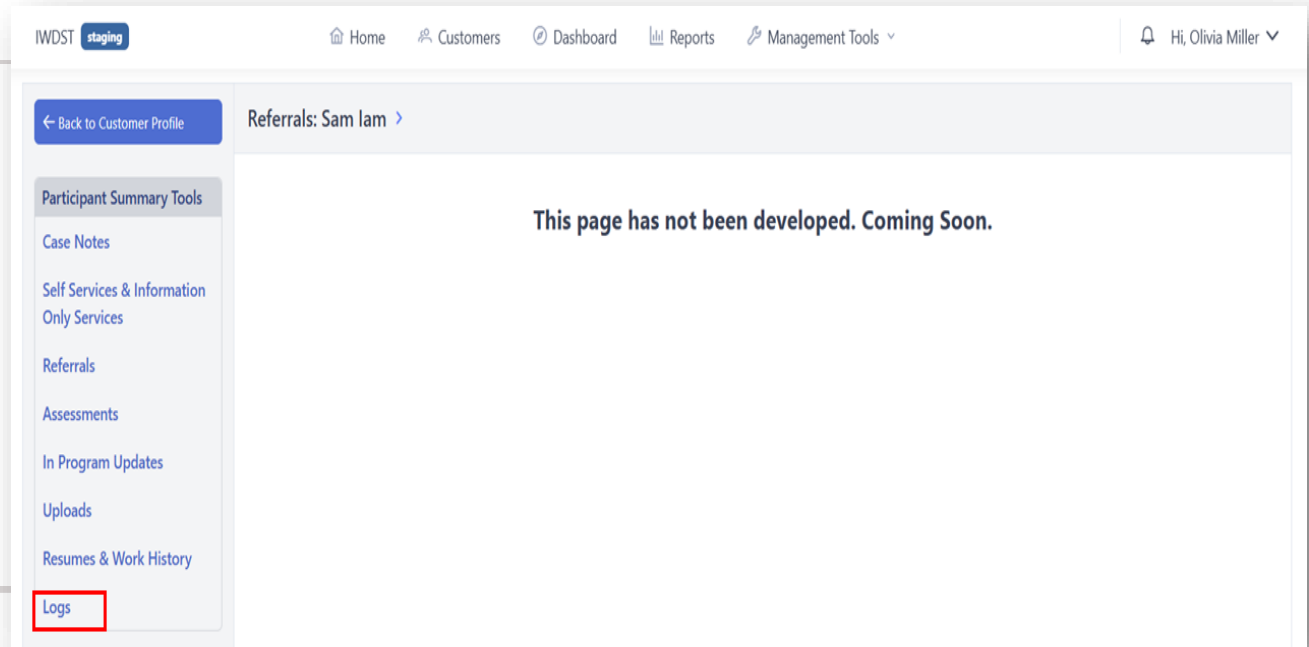
Participant Summary Tools: Resume & Work History

- 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

The screenshot displays the IWDST staging application interface. The top navigation bar includes links for Home, Customers, Dashboard, Reports, and Management Tools, along with a user profile for Hi, Olivia Miller. The main content area is titled 'Resumes: Sam lam' and features a sidebar menu for 'Participant Summary Tools' with options like Case Notes, Self Services & Information Only Services, Referrals, Assessments, In Program Updates, Uploads, Resumes & Work History (highlighted with a red box), and Logs. The 'Resumes & Work History' section is divided into two parts: 'Resume & Cover Letter' and 'Work History'. The 'Resume & Cover Letter' section shows a table with columns for Name, Type, Created, Updated, and Actions, and a message stating 'No resumes or cover letters found in WorkNet.' Below this is a pagination control showing 'Showing 0 to 0 of 0 documents' and a dropdown menu set to '10'. An 'Add File' button is visible. The 'Work History' section shows a table with columns for Employer, Job Title, Start Date, End Date, Current, Source, and Created, and a message stating 'No employment history found.' Below this is a pagination control showing 'Page 0 of 0' and a dropdown menu set to '10'.

Participant Summary Tools – Logs

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



The screenshot shows the IWDST staging application interface. The top navigation bar includes links for Home, Customers, Dashboard, Reports, and Management Tools, along with a user profile for Olivia Miller. The main content area is titled 'Referrals: Sam lam' and contains a message: 'This page has not been developed. Coming Soon.' On the left, a sidebar menu lists various tools under 'Participant Summary Tools', with 'Logs' highlighted by a red box.

IWDST **staging** Home Customers Dashboard Reports Management Tools Hi, Olivia Miller

[← Back to Customer Profile](#) Referrals: Sam lam >

Participant Summary Tools

- Case Notes
- Self Services & Information Only Services
- Referrals
- Assessments
- In Program Updates
- Uploads
- Resumes & Work History
- Logs**

This page has not been developed. Coming Soon.

Participant Summary Tools – Legacy Summary

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

The screenshot shows a web application interface for a 'Legacy Summary'. At the top, there is a navigation bar with a blue button labeled '← Back to Customer Profile' and the text 'Legacy Summary: Masood Ab3927209 >'. Below this is a sidebar menu titled 'Participant Summary Tools' with several options: 'Case Notes', 'Self Services & Information Only Services', 'Referrals', 'Assessments', 'In Program Updates', 'Uploads', 'Resumes & Work History', 'Logs', and 'Legacy Summary' (which is highlighted with a red box). The main content area is titled 'Services' and is divided into three sections: 'Mapped services', 'Unmapped legacy services', and 'Applications'. The 'Mapped services' section lists 'APPLICATION #10751' with four bullet points: 'Job Search Activities and Assistance (STAFF ASSISTED)', 'Initial Assessment of Skill Levels & Other Service Needs (STAFF ASSISTED)', 'Job Search Activities and Assistance (STAFF ASSISTED)', and 'Career Information Services (STAFF ASSISTED)'. The 'Unmapped legacy services' section lists two items: '[10/30/2017 – 10/30/2017] Eligibility Determination (activity #85, level #41)' and '[1/3/2019 – 9/23/2019] Self-Directed Job Search (activity #472, level #57)'. The 'Applications' section contains two entries: '[2025-10-31] Application #11469 · Applicant · LWIA Kane County Office of Community Reinvestment · CP: Alannis Munoz' and '[2017-10-25] Application #10751 · ExitedParticipant · LWIA Kane County Office of Community Reinvestment · CP: Linda Kojan'. Each application entry has sub-sections for 'GOALS' (with the text 'No goals.') and 'OBJECTIVES' (with the text 'No objectives yet.'). At the bottom of the page, there is a link for 'Legacy IEP (Career Connect)'.

Reports – Finding What You Need

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

The screenshot shows the IWDST Reports page. The top navigation bar includes 'Home', 'Customers', 'Dashboard', 'Reports', and 'Management Tools'. The user is logged in as 'Hi, Olivia Miller'. The page is divided into two main sections: 'Report Filters' on the left and 'View Reports' on the right.

Report Filters:

- Search:** A text input field with the placeholder 'Search'.
- Category:** A dropdown menu currently set to 'All'.
- Buttons:** 'Search' and 'Reset' buttons.

View Reports Table:

Name	Category	Run
> Caseload Summary	Participant	▶ Run Custom run
> Detail LWIA-Provider Relationship	Provider Management	▶ Run Custom run
> Detail Service Provider Registration	Provider Management	▶ Run Custom run
> Detail Training Provider Entity	Provider Management	▶ Run Custom run
> New Certified Training Programs	Provider Management	▶ Run Custom run
> Participants by Grant	Grant	▶ Run Custom run
> Target Population Summary	Provider Management	▶ Run

Footer: 11 Entries, Page 1 of 2, navigation buttons, and a dropdown menu showing '1' and '10'.

Reports – Understanding the List

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

View Reports

Name	Category	Run
Detail Service Provider Registration	Provider Management	Run Custom run

Description: Customer registrations (applications created within the reporting period) tied to a specific service, service level, or program. Each row shows the funding entity, location, relationship identifier, and the customer's application status.

Report Data: LWIA, Entity Name, FEIN, Location, Relationship #, Customer Name, Customer ID, App Status, Registration Date, Program, Service Level, Service, ITA Funded

Filter Criteria: LWIA: All, Service Level: All, Service: All, Program(s): All, ITA Funded (ask AI): All, Relationship # (ask AI): All, Reporting Period From: today-90d, Reporting Period To: today

Grouping and Aggregation: Grouping: LWIA | Aggregate: Customer Name

Available Views: Table View

Run: Detail Service Provider Registration

Customer registrations (applications created within the reporting period) tied to a specific service, service level, or program. Each row shows the funding entity, location, relationship identifier, and the customer's application status.

LWIA	Service Level
All	All
Service	Program(s)
All	All
ITA Funded (ask AI)	Relationship # (ask AI)
No filter	
Reporting Period From	Reporting Period To
02/03/2026	05/04/2026

Cancel Reset to defaults Run report

Reports – Using Reports

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

IWDST **staging** Home Customers Dashboard Reports Management Tools Hi, Olivia Miller

Detail Service Provider Registration

Customer registrations (applications created within the reporting period) tied to a specific service, service level, or program. Each row shows the funding entity, location, relationship identifier, and the customer's application status.

Draft behavior for demo: saved views and report creation are session-only.

Report Parameters

TOTAL PARTICIPANTS PER RELATIONSHIP	TOTAL PARTICIPANTS PER PROVIDER	TOTAL PARTICIPANTS PER LWIA
110	66	64

Filter rows

Search all columns

Visible columns

9 items selected

Entity Name	FEIN	Location	Relationship #	Customer Name	Customer ID	App Status	Registration Date
<input type="text" value="Filter Entity Name"/>	<input type="text" value="Filter F"/>	<input type="text" value="Filter Location"/>	<input type="text" value="Filter Relation"/>	<input type="text" value="Filter Customer"/>	<input type="text" value="Filter Custor"/>	<input type="text" value="Filter App"/>	<input type="text" value="Filter Reg"/>
▼ (10) Workforce Investment Board of Will County (2 rows)							
PROGRESSIVE TRUCK DRIVING SCHOOL, INC.	363558891	Progressive Truck Driving School Inc	102004001-00	Trimble OSY, Kelly	12669	Applicant	05/04/2026
				Trimble OSY, Kelly	12669	Applicant	05/04/2026
> (15) Career Link/LWIA 15 (3 rows)							
> (20) Land of Lincoln Workforce Alliance (105 rows)							

Logging In: Knowing Your Path

Access depends on your account type

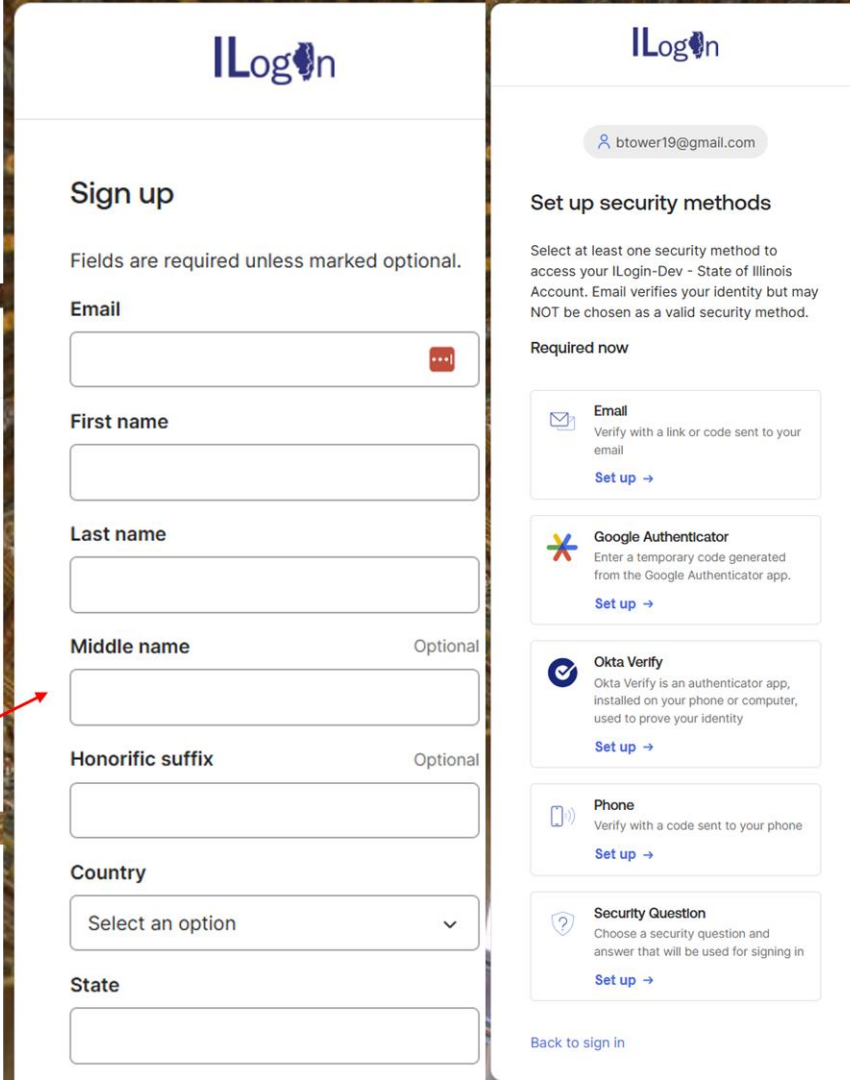
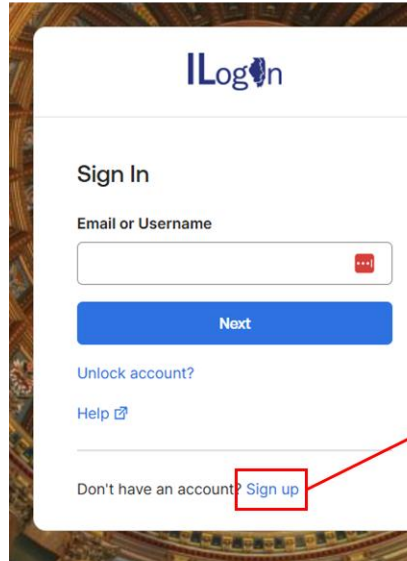
- Non-State Users (For most career planners at local organizations)
- State Users
- All users use 2-factor authentication (2FA)



Logging In: Non-State Users

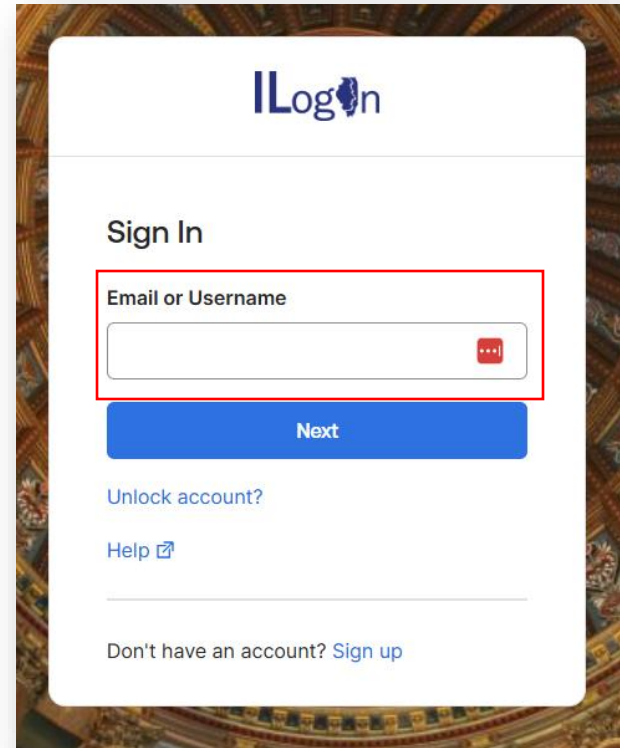
For individuals who do not have an [Illinois.gov](https://www.illinois.gov) email

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



Logging In: State Users

- [Illinois.gov](https://illinois.gov) users do **not** create anew account
- Access is connected by an Account Manager
- Help is available if issues come up



The screenshot shows the ILogIn sign-in interface. At the top is the ILogIn logo. Below it is the heading "Sign In". A red rectangular box highlights the "Email or Username" input field, which is currently empty and has a red "x" icon on the right side. Below the input field is a blue "Next" button. Underneath the button are links for "Unlock account?" and "Help" with an external link icon. At the bottom, there is a link for "Don't have an account? Sign 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!