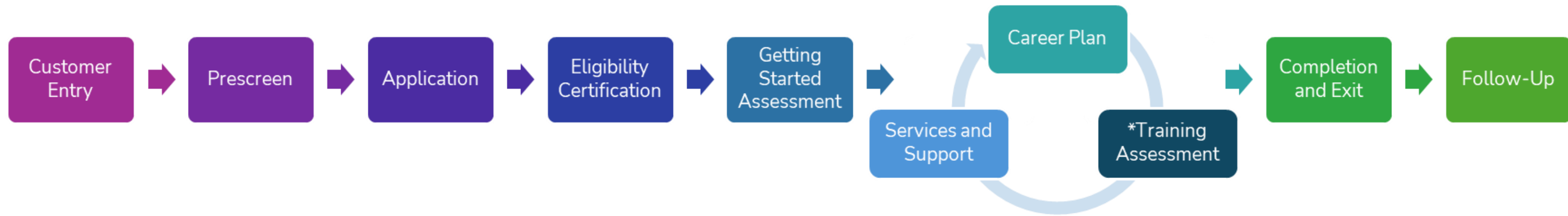


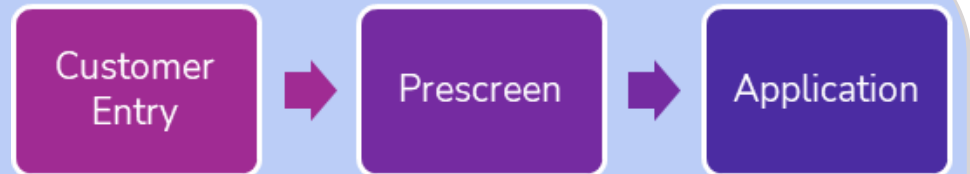
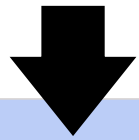
IWDS 2.0:

Leadership Prep Series

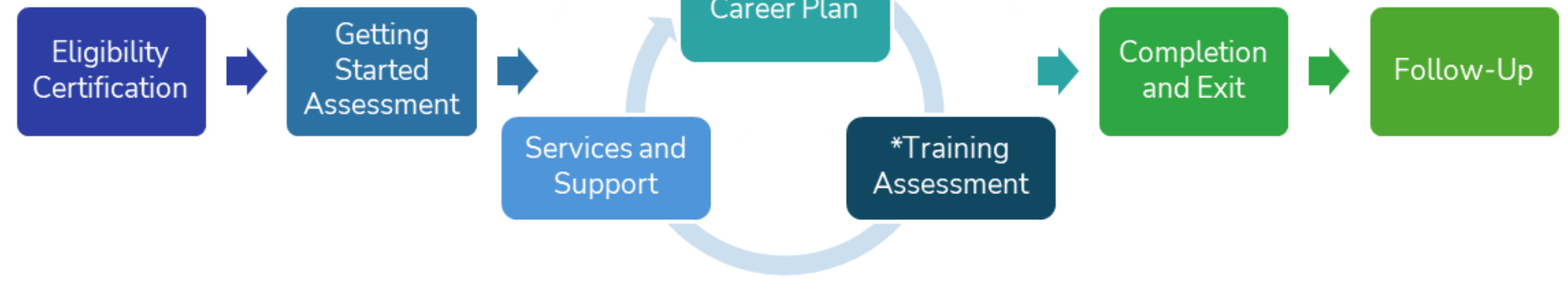


IWDS 2.0 Customer Journey

Today's Focus



Review IWDS 2.0 Process and Customer Questions, Policy Updates, and Performance and Reporting Reminders that may impact Local Ares



A Note Before We Begin

As we walk through the IWDS 2.0 system, you'll notice a comprehensive set of questions across each stage. Here's an important context to keep in mind:

The System is Intuitive

IWDS 2.0 dynamically presents only the questions that are applicable to each individual customer. Not every customer will see every question — the system adapts based on their responses, program eligibility, and service pathway.

About This Presentation

This training reviews all questions that exist within the system. This is intentional — so staff understand the complete picture. In practice, customers will only encounter the questions relevant to their situation.

☐ Think of this as seeing the full menu — your customers will only be served what applies to them.

CHAPTER 1

Customer Entry

The first step in the IWDS 2.0 journey — designed to be accessible, low-barrier, and available through both self-service and staff-assisted pathways. Customer Entry establishes the foundation for every interaction that follows.

CUSTOMER ENTRY

 SYSTEM PROCESS

2.0 Process: Customer Entry

IWDS 2.0 supports two distinct entry pathways, ensuring customers can access services regardless of their starting point or comfort with technology.

Path A: Self-Accessed Entry

The customer visits the **WIOA Welcome Page** to learn about programs and services. If interested, they complete a brief **Self-Service Form**.

Once the customer submits the form, the system will automatically email them a link the **Prescreen**.

Path B: Career Planner Assisted

If an American Job Center is already working with a customer, a Career Planner can select **Start Intake Process** directly in the system.

Self-Accessed Entry Questions

Customers complete the following fields to begin their IWDS 2.0 journey.

First Name

Last Name

Email

Phone Number

Zip Code

Date of Birth

How can we help you?

- Train for a new career
- Find a new job
- Further my education

Upcoming Policy Updates: Self-Accessed Customer Entry

A critical policy distinction in IWDS 2.0 is the line between **Self-Service/Information-Only** and **Staff-Assisted** services. Recognizing this boundary is essential for accurate service recording and compliance; use the comparison below to distinguish between these two service pathways.

Self-Service & Information-Only

Services are self-service when they provide **general workforce information that is not personalized** — broad, generic, and applicable to anyone, not tailored to an individual's specific barriers, work history, or goals.

Staff involvement is limited to:

- Greeting or intake triage
- Providing general instructions on how to access systems
- Directing individuals to publicly available information
- Delivering general labor market or program information applicable to all customers

Staff-Assisted Services

A service becomes **Staff-Assisted** at the point when staff provides **individualized guidance** — including when staff:

- Interprets information considering a person's unique work history or barriers
- Reviews personal documentation
- Recommends specific employment or training options
- Applies professional judgment to tailor advice to an individual's situation

Whenever professional judgment is applied to an individual's unique situation, the service **must be classified and recorded as staff-assisted**.

Upcoming Policy Updates: Self-Service vs. Staff-Assisted — What's the Difference?

The key distinction is not *how* a service is delivered — it's whether **professional judgment is applied to an individual's specific situation**. IWDS 2.0's customer-centered design enables the system to systematically capture and record this distinction accurately.

Self-Service

"Here are all the things WIOA can do."

"Here's how to access services."

This information is **standard** — it is not dependent on the individual's specific circumstances, goals, or history. Any customer could receive the same information.

Staff-Assisted

*"Based on what we know about **you** — these specific services would help."*

A Career Planner uses their **professional judgment**, combining their knowledge of the system with what they learn about the customer, to determine the best next step for that specific individual.

Note: These policies are not new — IWDS 2.0 simply makes recording and tracking more systematic and consistent.

CUSTOMER ENTRY

 POLICY

Upcoming Policy Updates: Customer-Centered Design Guardrails

Two key policy requirements apply at the Customer Entry stage:

No Additional Local Requirements

Under the customer-centered design principle, **local boards may not add additional criteria, forms, or questions** for customers at any stage of the process. This standardized statewide experience ensure consistent customer access.

No Wrong Door

A local area **may not limit customer choice** by having a local policy that requires a customer to either live or work within the boundaries of their local area.

Performance & Reporting Reminders: Virtual Customer Entry

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	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.

CHAPTER 2

Pre-Screen

The Pre-Screen is the first structured interaction in the IWDS 2.0 journey — designed to gather essential information early, determine potential eligibility, and connect customers to the right services quickly and efficiently.

2.0 Pre-Screen: What's Included

The Pre-Screen is structured as a guided, multi-section experience that collects information progressively — keeping the process approachable while ensuring completeness.

01

Introduction

Welcomes the customer, sets a positive tone, and explains what to expect throughout the process.

03

Getting to Know You Better

Gathers information on transportation, childcare, housing stability, financial needs, and other personal considerations.

05

Eligibility Questions

Collects general and program-specific eligibility information for WIOA services.

02

Selection of Goals

Captures short- and long-term career and education aspirations.

04

Skills Screening

Uses the Basic Skills Screening Tool to assess literacy, numeracy, digital, and job-specific skill levels.

06

Demographic Data & Review

Captures race, ethnicity, gender, veteran status, and other characteristics. Customer reviews and confirms all responses.

Goal Questions

Customers select goals that best describe what they're working toward. Selections shape the services and pathways offered.

Train for a New Career

- Start/Change Career
- Return to Work
- Become an Apprentice
- Earn a Job-Ready Credential
- I'm unsure

Find a Job Now

- Start/Change Career
- Return to Work
- Get a Job
- Start a Business
- Gain hands-on experience
- Become an Apprentice
- I'm unsure

Further my Education

- Get HS diploma or equivalent
- Earn a Job-Ready Credential
- Earn a Degree
- I'm unsure

Getting to Know You

These questions help staff understand the customer's goals, urgency, and career interests to connect them with the right services.

- 1** What are some goals you're working toward or interested in achieving? (Select all that apply)
- 2** How urgently do you need to find a job now?
- 3** Do you have a specific career goal in mind, or are you exploring your options?
- 4** What career do you have in mind? (Pick your top three)
- 5** What career field do you have in mind? (Pick your top three)
- 6** What training programs do you have in mind? (Pick your top three)

Getting to Know You Better

These questions identify potential barriers and support needs to ensure customers receive appropriate services.

Job Preferences

What factors do you need to consider when looking for a job?

Work Experience

Which description best fits your work history?

Health Needs

Do any health needs impact your ability to work or attend training?

Transportation Situation

How will you get to work or school?

Childcare & Dependent Care Needs

Do you care for children (0-18) or other family members?

Housing Needs

Which description best fits your current housing situation?

Legal Needs

Do any legal situations impact your ability to work or attend training?

Money Needs

How do you feel about your current financial situation?

2.0 Pre-Screen: Basic Skills Screening Tool

The **Basic Skills Screening Tool** is embedded directly within the Pre-Screen. It is designed to be accessible and non-intimidating — using plain language to help customers self-report their current skill levels.

For each item, customers select **I can't do this yet** · **I need help** · **I'm not sure** · **I can do this on my own**

Reading & Writing

- I can read and understand stories, articles, or directions written in English.
- I can write notes, lists, or short paragraphs in English so others can understand my ideas.

Math & Communication

- I can add, subtract, multiply, and divide numbers without a calculator. Example: $245 + 178$, or 96×7
- I can speak English well enough to get or keep a job.

Digital & Functional Skills

- I can use a computer to complete tasks (email, job applications, online payments).
- I can follow step-by-step written or visual instructions.
- I can fill out forms such as medical forms or job applications.

PRE-SCREEN

 IWDS 2.0 QUESTIONS

General Eligibility Questions

Basic eligibility questions asked of all customers to determine program qualification.

1 Confirm Date of Birth

2 Confirm Sex Assigned at Birth

3 Are you a U.S. Citizen?

4 Can you legally work in the U.S.?

5 Do you meet the Selective Service requirements?

Youth Eligibility Questions

These questions determine eligibility for In-School Youth (ISY) and Out-of-School Youth (OSY) programs.

School Status

- Are you currently enrolled in school? (includes high school, home school, college, trade school, or other training)
- Have you graduated high school?

Income & Support (*Select all that apply*)

- I or someone in my family gets SNAP (food stamps/EBT) or got them in the last 6 months
- I or someone in my family gets TANF or got it in the last 6 months
- I or someone in my family gets SSI
- I or someone in my family gets other cash assistance from state/local government
- I get free or reduced-price lunch at school
- My family or I have limited income
- None of these describe me

Youth Eligibility — Additional Barriers

Customers select any barriers that apply to their situation. These responses help determine eligibility and appropriate support services.

- I need a permanent place to live
- I am in foster care right now
- I used to be in foster care
- I am younger than 18 and have left home without my parent's or guardian's permission
- I have trouble reading and understanding English
- I have trouble writing in English
- I have trouble doing math without a calculator
- I have trouble speaking English well enough to get or keep a job
- I have trouble using a computer to complete tasks
- I have trouble following step-by-step instructions
- I have trouble filling out forms
- I am pregnant right now
- I have a child (or children)
- I have been involved with the court system
- I have a disability
- None of these describe me

PRE-SCREEN

 IWDS 2.0 QUESTIONS

Out-of-School Youth Eligibility Questions

These questions determine whether a customer qualifies as Out-of-School Youth (OSY) under WIOA.

Did you get your high school diploma?

Yes / No

Did you get a GED or High School Equivalency (HSE)?

Yes / No

Have you attended school in the last 3 months?

Not counting summer break. (Yes / No)

Additional Barriers

Are there other reasons making it hard to reach your education or job goals that we can help with?

Dislocated Worker Eligibility Questions

Customers who have lost employment through no fault of their own may qualify as Dislocated Workers. Select all that apply.

- 1 Did you lose your job even though it wasn't your fault, or receive a layoff notice?
- 2 Did the place you worked close or have to let people go?
- 3 I lost my last job and had to take other work, but I earn less or no longer have health care coverage.
- 4 I need help finding a new job because I can't go back to my old one.
- 5 I have applied for, am currently receiving, or am no longer receiving Unemployment Insurance (UI) benefits.
- 6 I worked at a job that did not pay into UI, or I earned less than \$4,000 in the last 6 months.
- 7 I used to work for myself or run a business but had to stop due to something out of my control.
- 8 I worked full-time for a self-employed person for at least one year, and that business has now closed.
- 9 I used to rely on a spouse or family member's income while caring for my home, but that support has changed and I am ready for a job.
- 10 I recently served in the Armed Forces or am transitioning to civilian life and am ready to find a new job.
- 11 I am the spouse of an active-duty military member and lost my job due to relocation or need help finding a better job.

Demographic Data Questions

These questions collect demographic information for reporting purposes and to connect customers with appropriate language and accessibility support.

Language & Accessibility Support

1. Do you need any accommodations or assistance to participate?
2. What parts of using English are hard for you? (Check all that apply)
3. What language did you grow up speaking?
4. What language do you speak at home?
5. Would you like information about free programs to help you improve your English?
6. What kind of help or support do you need?

Personal Information & Identity

1. First Name / Middle Initial / Last Name / Preferred Name
2. Do you identify as a person of Hispanic, Latino, or Spanish ethnicity?
3. Which race(s) do you identify with? (Select all that apply)
4. Would you mind telling us your sexual orientation?
5. Would you care to share any disability status? (Asked for reporting purposes)
6. Are you a veteran?

Upcoming Policy Updates: Pre-Screen — Eligibility Determination

Based on the data the customer inputs, the system will automatically determine whether a customer is potentially eligible for WIOA services — removing manual guesswork and ensuring consistency in eligibility triage.

If Potentially Eligible

- Customer receives a prompt indicating they may be a good fit for WIOA.
- Customer is required to watch an **Orientation Video** before accessing the application.
- Customer receives a **Preparation Packet** outlining required documents to submit.
- Customers may proceed independently to the application, or complete it with a Career Planner.

If Not Potentially Eligible

- System directs the customer to **other resources** that may assist them.
- Customer is encouraged to reapply if their situation changes.
- Pre-screen data remains available for reporting and outreach.

 **Discussion:** Do you provide any local forms or documents to customers for information or to sign?

PRE-SCREEN

 POLICY

Upcoming Policy Updates: Pre-Screen — Outreach for Ineligible Customers

When a customer's pre-screen indicates they may not currently be eligible, IWDS 2.0 provides tools to stay connected and support re-engagement over time.

Reporting & Data Availability

Pre-screen data is available through reporting, allowing local areas to review outcomes and conduct outreach if eligibility factors or customer circumstances change. This creates a feedback loop between triage data and service delivery.

Outreach Encouragement

While outreach to ineligible individuals is **not required** under IWDS 2.0 or its accompanying policies, **engagement is encouraged** — particularly as new providers supported by non-WIOA funding are introduced in the area. Customers already connected to the Illinois workforce system are a priority for re-engagement when circumstances change.

Performance & Reporting Reminders: Pre-Screen

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
Pre-Screen	<ul style="list-style-type: none">• Goals• Challenges• Basic Skills Screening Tool• General Eligibility Criteria• Specific Program Requirements• High-Level Demographic Data	Reportable Individual	1A, 1D, 1Y — None. Data is collected but no performance measures are triggered at this stage.

CHAPTER 3

Application

This section covers the IWDS 2.0 application process, which asks more detailed eligibility questions.

APPLICATION

SYSTEM PROCESS

Process: Application



Before the Application

The customer is required to watch an **Orientation Video** and receives a **Preparation Packet** outlining the documents needed for submission.



Start Application

Customers completing the process on their own may proceed directly to the application. If working with a career planner, the application can be completed together, or the link can be sent to the customer to complete independently.

IWDS 2.0 Application Questions

Customer Details

- Information Verification
- Marital Status
- Living Situation
- Street Address
- Mailing Address

Phone & Communication

- Phone Ownership
- SMS Capability
- Preferred Contact Method

Additional Contact

- Name Information
- Contact Phone
- Contact Email
- Relationship Details

APPLICATION

 IWDS 2.0 QUESTIONS

Veteran Information Questions

Transitioning Service Member

Are you a transitioning service member?

Qualified Spouse

Are you a qualified spouse?

Discharge Reason

What was your discharge reason?

Private Information

Identity & Citizenship

- Date of Birth
- Are you a US Citizen?
- Can you legally work in the US?

Selective Service

- This question would display for Males, within 30 days of turning 18 or older and selected I'm unsure or I need assistance.
- *The customer indicated they do not know if they meet selective service requirements. Please work with the customer to determine if they are registered or qualify for a waiver. You can search selective service numbers here [<https://www.sss.gov/>].*

Personal Circumstances

- Do you have a disability?
- Do any of the following apply?
 - Justice system involvement
 - English language challenges
 - Additional applicable items

Social Security Number

- You don't have to give us your Social Security Number (SSN), but we ask for it to help serve you better.

Here's why: To find your account – Your SSN helps us check if you already have an account in IWDS or if you've used workforce services in Illinois before. To meet federal rules – We use your SSN to follow federal rules for reporting and tracking workforce programs. To improve services – Sharing your SSN helps us show how well the WIOA program is working. This helps keep the program strong so it can support more people with jobs and education.

If you choose to share your SSN, we will keep it safe and private. We will not share it with anyone unless you say it's okay.

Education Information

Current School/Training

What kind of school or training are you in right now? (Choose one)

Highest Education Completed

What is the most school or training you've finished so far?

High School Dropout Confirmation

Based on information gathered at prescreening it looks like you dropped out of high school. Is that right?

School Absence Confirmation

Based on information gathered at prescreening it looks like you haven't been in school for 3 or more months while school was in session. Is that right?

Household Information

Financial Support Change

- Spouse/family member lost their job
- Spouse deployed or called to active duty
- Spouse had a change in military station or assignment
- Spouse has a service-connected injury or disability
- Spouse passed away due to military service
- Spouse passed away (not related to military service)
- Divorced or legally separated from spouse
- Support changed for another reason

Current Work Situation

- No job and having a hard time finding one
- Has a job but not enough hours or pay
- Has a job but wants to move up or find something better
- Not working and not looking right now
- Situation is different from these options

Household Information (Dislocated Worker)

Family Member Dislocation Job

- Dislocation job entry
- Employer search & name
- Job title & IEBS ID
- Address
- Date notified of layoff
- Projected & actual layoff date
- Pre-layoff earnings
- UI benefits situation
- UI eligibility check

Industry & Occupation Codes

- NAICS code & description
- Declining industry flag
- O*NET code & description
- Low growth occupation flag

Customer Employment Status

- Current employment situation
- Reason no longer self-employed
- UI claimant status & verification
- Customer dislocation job & earnings
- UI benefits situation & eligibility
- Declining industry & low growth occupation
- Needs additional assistance
- Reason for additional assistance

Family & Household Information

Do any of the following apply to you? Select all that apply.

- I get free or reduced-price lunch at school.
- I or someone in my family gets other cash help from the state or local government, or we got it in the last 6 months.
- I or someone in my family gets Refugee Cash Assistance or we got them in the last 6 months
- I get SSDI (Social Security Disability Insurance).
- I or someone in my family gets SSI (Supplemental Security Income).
- I or someone in my family is a Ticket to Work Program Ticket Holder.
- I or someone in my family gets SNAP (food stamps, EBT) or we got them in the last 6 months.
- I or someone in my family gets TANF (Temporary Assistance for Needy Families), or we got it in the last 6 months.
- My family or I have limited income
- None of these describe me.

Career Planner Questions

Career planners have access to a dynamic secondary page to collect supplemental information – displayed only when the customer's application responses indicate a need for further review.

This page will *not* display if eligibility or service priority has already been established through the customer's application responses – reducing redundancy and streamlining intake.

Basic Skills Deficiency

This customer did not meet the basic skills deficient criteria through the Skills Screening Tool. Does the customer meet the basic skills deficient requirements in other ways?

Low-Income Youth 5% Allowance

Would you like to request enrollment for this youth using the 5% allowance for individuals who do not meet the low-income requirement?

Supervisor Approval Pathway

For the items above, career planners may request supervisor approval if they believe a customer could be determined eligible under the low-income or in-school youth needing additional assistance exceptions.

TABE / CASAS Testing

If no other qualifying pathway has been established, a TABE or CASAS assessment may be administered to determine Basic Skills Deficiency eligibility.

When to Administer

A TABE or CASAS assessment should only be administered if:

1. The customer has not already met the Basic Skills Deficiency threshold through their application question responses *and*
2. The Career Planner believes the customer may qualify through this pathway

Important Reminder

- TABE or CASAS assessments should only be administered when eligibility has not already been established through another qualifying pathway.
- This assessment is a last resort — not a default step in the intake process.

Social Security Number (SSN) Policy

Career planners must request a customer's **Social Security Number (SSN)** when finalizing the application. Understanding the distinction between requesting and requiring an SSN is critical for compliant service delivery.

Required to Request

Local boards must request SSNs for performance reporting and wage record matching. Career planners should ask for the SSN during the application finalization step.

Not Required to Provide

- SSNs are **encouraged but not mandatory** for eligibility determination or service receipt.
- Services **cannot be denied** if a customer declines to provide their SSN.
- Local policies may **not require** SSN disclosure as a condition of service.
- **Alternative unique identifiers** will be used in the system when SSNs are not provided.

Application — Next Steps for Self-Service Customers

1. Customers who complete the application independently will be directed to schedule an appointment with their local office to finalize the intake process with a Career Planner.
2. Customers will have the option to upload supporting documentation for eligibility and priority items related to the information they entered in the system. Uploading documentation at this stage is optional; customers may also receive assistance from a Career Planner to upload documents later in the process.

**Career Planners will also be able to upload documentation in the system and are responsible for ensuring that all required documentation is uploaded before certifying eligibility.*

Performance & Reporting Reminders

The table below outlines the data gathered during Customer Entry, its current reporting status, and key performance and reporting notes for career planners and local area staff to keep in mind.

2.0 System Step	Data Gathered	Reporting Status	Performance & Reporting Notes
Application	Eligibility Information	Reportable Individual	1A, 1D, 1Y — None. Data is collected but no performance measures are triggered at this stage.

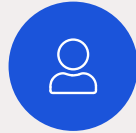
CUSTOMER ENTRY

PRE-SCREEN

APPLICATION

 SUMMARY

What We've Learned About the Customer



Basic Information

Name, demographics, and identity details



Contact Information

Phone, email, and communication preferences



Household & Living

Home, family, and living arrangements



Veteran Status

Military service and background



Goals

Career goals and motivation for applying



Employment Status

Current work situation and job history



Education Level

Highest education and current enrollment



Barriers to Employment

Challenges and circumstances affecting work

Potential Procedural Impact

Local areas should begin reviewing current workflows to identify procedural changes needed.

Document Current Workflows

Map your current procedures, including who conducts them, and what forms or systems are used.

Identify Conflicts

Flag any local practices and procedures that diverge from IWDS 2.0

Prepare for Updates

Revise local procedures and staff guidance documents to reflect the new IWDS 2.0 structure.

We're Still **Building** 😊

- Any Additional thoughts to keep in mind?
- Questions?
- Feedback?

THANKS!