


# IWDS 2.0 Customer Journey

CUSTOMER ENTRY

 SYSTEM PROCESS

# Scheduling Appointments

-  At the end of the Application, customers will be prompted to make an appointment with their local office, and encouraged to complete the Skills & Interest Survey and upload their Work History.

# General Process: Requesting Appointments

IWDS 2.0 includes a built-in tool that connects customers to their local American Job Center in a few simple steps.

Designated local administrative staff are responsible for reviewing incoming requests and assigning the appropriate staff to respond.

01

## Locate Office

The customer locates the office they wish to connect with.

02

## Office Notified

The system notifies the local area of the customer's request.

03

## Staff Assignment

Local staff assign a primary and secondary career planner to the customer.

04

## Initial Contact

The career planner makes reasonable efforts to contact the customer and schedule a meeting.

# Policy: Responding to Customer Inquiries and Scheduling Appointments

Local boards must develop a procedure to ensure the following steps are complete **within five (5) business days** from the date of submission.



**Inquiries are addressed**



**Local staff is assigned**



**The customer is contacted to schedule an appointment**

# Pre-Meeting Preparation

Prior to the meeting, local staff should review the submitted application to understand the customer's situation and identify any submitted or missing documentation.

This review should be completed with enough lead time to notify the customer if additional or corrected documents are needed. The review must not impose documentation requirements beyond what the system specifies.

- ❏ For local areas with an Eligibility Specialist (ES) role, the local area may assign the application to an ES to conduct the eligibility certification. Once, the customer is certified, local areas will assign a primary and an optional secondary career to the customer. A different staff person can now take lead if necessary.

CHAPTER 4

# Eligibility Certification

Verifying and confirming program eligibility for WIOA services.

# During the Meeting: Completing the Application

## Collect Documentation

Career planners collect any missing documentation and verify that all provided documents meet source documentation requirements outlined in policy, including the use of self-attestation where permitted.

## Complete the Application

If the customer was unable to complete the application independently, the career planner must work with them to finish it before proceeding to eligibility determination.

## Career Planner Questions

Career planners are responsible for answering certain application questions that are not displayed in the customer-facing application.

# Documentation Required: No Self-Attestation

Selective Service Requirements	Terminated, laid off, or received notice	UI Benefits	Tenure with Employer at Separation
Low Growth/Declining Industry	Requires Additional Assistance (Adult/Dislocated Worker version)	Profiled to Exhaust UI Benefits	Income reduction due to military-related circumstances
Spouse of a member of Armed Forces on active duty	Relocation due to permanent change of duty station	Attending School	Family Size
Free or Reduced-Price Lunch	Youth living in high poverty area	Veteran/Transitioning Service Member	Qualified Spouse of a Veteran

# Supporting Documents & Reducing Barriers

While certain documents (such as a driver's license or social security card) may not be strictly necessary for determining program eligibility, they are often essential for securing employment. Career planners can significantly reduce the administrative burden on customers—particularly those from underserved backgrounds—by proactively helping them obtain the necessary documentation for their professional success.

## Key Documents for Employment

- Driver's license or identification card
- Social Security card
- Birth certificate

## Refer to Partner Organizations

Connect customers with:

- Legal assistance partners
- Support organizations for immigrants and refugees
- Resources for homeless customers, youth, and justice-involved individuals

## Career Planner Guidance

Career planners are encouraged to assist customers in obtaining these documents to directly reduce barriers to employment, ensuring a more inclusive and efficient experience for all applicants.



# Certifying Eligibility

If the customer's information has flagged them as eligible and required supporting documentation has been uploaded and verified, career planners must certify them eligible without adding local forms, procedures, etc.

## Cheat Sheet Available

Career planners have access to a system-generated Program Eligibility and Priority of Service Determination Cheat Sheet, customized to the customer based on their Pre-Screen and Application responses.

## Program Status Management

Career planners can certify a customer eligible for any or all programs. They can set programs as "Inactive" or "Active" as the customer's journey evolves (e.g., Adult vs. Youth program).

CUSTOMER ENTRY

 POLICY

# Policy: Responding to Customer Inquiries and Scheduling Appointments



## 30-Day Review Window

Career planners have 30 calendar days to determine eligibility after the application is submitted. If not reviewed in time, information must be re-verified before proceeding.

# Closing Applications & Dashboard Tracking

## Closing Applications

The Customer and Career Planner can close applications prior to certification, but must define the reason for closure.

## Reopening Applications

Closed applications can be reopened. If reopened, the application must be re-reviewed and a new eligibility certification date must be established.

## Activity Log

All activity is logged so State and Local staff can see when and why applications were closed and reopened.

## Auto-Close Rule

IWDS 2.0 will automatically close the application if there is inactivity for 90 days or the GSA has been closed.

# Application Closure Options

Application Closed Prior to Enrollment

Closure Reason: System Closure Due to 90 Days of Inactivity

Closure Reason: Customer Chose Not to Move Forward (\*M)

Closure Reason: Doesn't Meet Eligibility Criteria (\*M)

Closure Reason: Found Employment (\*M)

Closure Reason: Getting Started Assessment Ended

Closure Reason: Health Reason (\*M)

Closure Reason: Legal Reason (\*M)

Closure Reason: Moved Out of Area (\*M)

Closure Reason: Personal/Family Reasons (\*M)

Closure Reason: Unable to Locate Customer (\*M)

Closure Reason: Other

(\*M) = Manual Reasons to close

CHAPTER 5

# Getting Started Assessment

Initial skills and needs assessment to connect customers with the right services and pathways.

# What Is the Getting Started Assessment?

The Getting Started Assessment is not a one-time event — it is an ongoing, individualized conversation.

Once the application is complete, supporting documents are submitted, and the customer is certified eligible, the system will prompt the career planner to begin the Getting Started Assessment. This guided conversation builds on intake responses to identify career goals and determine the most appropriate services

- ❏ A thorough assessment is the foundation of effective service delivery. It helps career planners understand a customer's employment goals, existing skills, career readiness, and barriers to education or employment.

# GSA System Reminders

## When WIOA Isn't the Right Fit

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If the conversation reveals that WIOA is not the best fit based on the customer's goals and expectations, Career Planners may close the assessment — which will also close the application.

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### Close the Assessment

A "Close Assessment" button appears on every page of the first portion of the GSA. Career Planners must discuss this determination with the customer and connect them to support services that better align with their needs and goals.

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### Document the Decision

Career Planners must document the reasoning for this decision in a case note.

# Getting Started Assessment

Section 1

# Part 1: Reviewing Customer Information

## What the Career Planner Does

Review the customer's answers to Pre-Screen and Application questions covering:

- Health needs
- Accommodation needs
- Transportation access
- Childcare/dependent care
- Housing situation
- Legal situation
- Financial situation
- Public assistance
- Basic skills flags

## Why This Matters

Understand the customer's current life situation, identify potential barriers early, and prepare for a focused, supportive conversation.

**Key Mindset:** This is not for screening people out — it's to meet customers where they are.

# Part 2: Understanding Employment Expectations

## What the Career Planner Does

Discuss and confirm:

- Urgency to find a job
- Career interests or fields
- Type of work (full-time, part-time, etc.)
- Work schedule preferences
- Desired wages
- Benefits preferences
- Travel distance
- Job search activity

## Why This Matters

- Align services with customer goals
- Set realistic expectations
- Identify readiness for employment vs. training

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Understanding Job Readiness and Needed Services

## What the Career Planner Does

Ask what steps the customer has taken to find work, and whether they want help with resume, interviews, or job search.

## Why This Matters

This helps determine immediate service needs and tailor support to where the customer is in their job search journey.

# Understanding Immediate Employment or Training Barriers

## What the Career Planner Does

Career Planners will be prompted to discuss the following potential barriers with the customer:

- Driver's license status
- Background check concerns
- Willingness for drug testing

## Training Note

These barriers should inform planning, not prevent participation. Use this information to guide service planning and connect customers with appropriate support.

# Part 3: Skill & Interest Alignment

## What the Career Planner Does

Review (or complete) the Skill & Interest Survey. The link is sent to the customer after completing their Application. If not completed ahead of time, a link can be sent during the meeting. The survey is mobile-friendly and takes about 5-15 minutes. Once completed, compare results to customer expectations from the previous section.

## Why This Matters

Ensures career goals align with skills and interests, and guides customers toward realistic pathways.

# Part 4: Goal Setting

## What the Career Planner Does

Confirm or refine career goals, discuss selected occupations, and review labor market alignment (e.g., demand occupations).

## Why This Matters

Creates a clear direction for services and connects goals to training and employment opportunities.

## Important Guidance

When discussing occupations: Do not discourage customers. Use information to inform and guide, not block choices.

# Part 5: Reviewing Job Requirements & Restrictions

## What the Career Planner Does

Discuss potential job requirements such as:

- Driver's License and Record
- Background checks
- Physical requirements
- Work schedules

## Why This Matters

Helps customers understand real-world expectations and prevents future barriers or drop-off.

## Required Confirmation

Career Planners must confirm this discussion occurred in the system before proceeding.

# Part 6: Training & WIOA Program Alignment

## What the Career Planner Does

Ask if the customer is willing to pursue training and how they think WIOA can support them.

## If Willing to Train

Career Planners will review:

- Local policy reminders (ITA Policies, Supportive Service Policies, Demand Occupation Priority Areas)
- How the Demand Occupation and the ETPL work with local policies
- Expectations of participation

## Why This Matters

Ensures the customer understands the commitment and that goals are aligned with program services.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Part 7: Motivation & Engagement ("The WHY")

## What the Career Planner Does

Ask: "What motivates you to reach your goals?"

## Why This Matters

Understanding motivation drives long-term success and helps Career Planners provide personalized, sustained support throughout the customer's journey.

# Employment History

## Covers

- Work history
- Skills gained
- Employment patterns
- Barriers to maintaining employment

## Why It Matters

Helps assess:

- Job readiness
- Transferable skills
- Need for training vs. job placement

# Part 8: Deep Dive Assessment Areas

## Covers

- Current enrollment
- Credentials
- Co-Enrollment Questions

## Why It Matters

Helps build a complete picture of the customer to determine training readiness and eligibility.

# What Does the Customer Know at this Point?



## Clarity on Their Goals

Better understanding of what they want to do and why



## Awareness of Their Options

Exposure to career pathways, training, and services



## Understanding of Expectations

What participation requires and how the process works



## Insight Into Their Situation

How factors like transportation, childcare, or finances may impact their plan



## Connection to Support

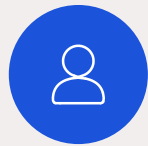
Awareness of resources available to help them succeed



## A Path Forward

A clearer, more realistic next step toward employment or training

# What Has a Career Planner Learned So Far?



## A Complete Customer Picture

Background, living situation, and real-life context



## Experience & Skill Foundation

Work history, education, and skill level



## Career Direction & Preferences

Goals, interests, and job expectations



## Practical Considerations

Ability to participate in work or training consistently



## Support Needs & Opportunities

Barriers and supportive service needs



## Engagement & Readiness


Motivation and preparedness for next steps

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Enrollment


With a comprehensive picture of the customer's background, goals, and barriers, career planners are well-positioned to determine the most appropriate services — and customers have a clearer understanding of how WIOA can support them.

-  At this stage, IWDS 2.0 will automatically enroll the customer in Initial and Comprehensive Services based on the completed assessment.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

## Section 2: GSA Conditional Assessment

-  Section 2 of the Getting Started Assessment will only be asked if WIOA can help the customer. This section is conditionally triggered based on the customer's eligibility and program fit.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Health & Support Needs

## Covers

- Physical/mental health
- Disability
- Support services
- Substance use or mental health referrals

## Why It Matters

Identifies the supports needed for the customer to be successful in work, school, or training.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Transportation

## Covers

- Access to car or public transit
- Barriers to transportation

## Why It Matters

Transportation is a major factor in job retention. Identifying barriers early allows career planners to connect customers with appropriate support services.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Childcare & Dependent Care

## Covers

- Availability of care
- Barriers to finding care
- Support needs

## Why It Matters

Childcare and dependent care are critical for participation in work or training. Identifying needs early helps connect customers with the right support services.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Legal Needs

## Covers

- Justice involvement
- Court obligations
- Legal barriers

## Why It Matters

Legal needs may impact employment options and scheduling. Identifying these early allows career planners to connect customers with legal assistance and plan services accordingly.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Financial Needs

## Covers

- Income stability
- Housing concerns
- Financial literacy
- Support services

## Why It Matters

Helps identify the need for supportive services and ensures customers have the financial stability to participate in work or training.

GETTING STARTED ASSESSMENT

 SYSTEM PROCESS

# Veteran Information

## Covers

- Military service
- Veteran programs
- Service-connected disabilities

## Why It Matters

Ensures priority of service for veterans and connects them with specialized programs and support available through WIOA and veteran-specific resources.

# Additional Demographics

## Covers

- Cultural/language barriers
- Farmworker status
- Other program participation

## Why It Matters

Identifies additional eligibility or support programs and ensures customers from specialized populations receive appropriate services and referrals.

# Potential Procedural Impact

Local areas should begin reviewing current workflows to identify procedural changes needed to align with IWDS 2.0

## Document Current Workflows

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

## Identify Policy Conflicts

Flag any local practices diverge from the standardized IWDS 2.0 Pre-Screen process.

## Prepare for Updates

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

TRAINING

VIRTUAL

# Virtual Training

To support the IWDS 2.0 launch on July 1, the Office of Employment and Training (OET) is offering a series of virtual trainings to prepare staff across all roles.

These trainings will:



## Foundational Knowledge

Build core understanding of IWDS 2.0



## Regional Prep

Prepare staff for in-person regional trainings



## Role-Specific Instruction

Deliver targeted system guidance by role

## Training Topics

Career Planner Journey

ETPL/Entity Management

Referral System

Performance & Reporting

Grant Management

Phase 1 Focus: Staff who support Career Planners

# **Getting Started Assessment Questions**

## *Getting Started Assessment Questions: Employment Expectations*

### **Work Schedule**

What schedule are you interested in working? (Full-time, Part-time, Temporary, Seasonal, Contract, Apprenticeship or internship, Remote or hybrid work, Any/open to options). What shift? (Day, Evening, Overnight, Weekdays, Weekends, Flexible)

### **Desired Salary**

What is your desired salary range? (Hourly, Monthly, Yearly, Other). Resources available if unsure about desired salary.

### **Employment Benefits**

What kind of employment benefits are you interested in? (Health Insurance, Paid Vacation Time, Paid Sick Time, Retirement/Pension, Other)

### **Travel Distance**

How far are you able to travel to get to work or school/training? (Up to 5, 15, 25, 50, or 100 miles)

## *Getting Started Assessment Questions: Job Readiness*

### **Steps Taken to Find Work**

What steps have you recently taken to look for work? (Select all that apply):

- Started or updated my resume
- Searched for jobs online, through apps, or in person
- Applied for one or more jobs
- Attended a job fair or hiring event
- Contacted employer directly
- Worked with a career coach or employment counselor (Where?)

### **Areas Where Help Is Wanted**

Would you like help in any of these areas?

- Updating my resume
- Searching for jobs
- Finding job fairs to attend
- Career Guidance
- Help with interviews
- Skills to Prepare for Any Job
- Learning to Manage Money

## *Getting Started Assessment Questions: Employment Barriers*

### **Driver's License Status**

Do you have a valid driver's license?

- I have a valid driver's license.
- I am working on getting my driver's license.
- I have a driver's license, but it has restrictions (e.g., work permit, vision restriction).
- I have a driver's license, but it is currently suspended.
- I do not currently have a driver's license.

### **Background Check**

Many employers do a background check before hiring. Do any of the following apply? (Select all that apply)

- I have a non-violent felony that might show up
- I have a violent felony that might show up
- I'm listed on the sex offender registry
- I have a misdemeanor that might show up
- None of these apply to me
- I'm not interested in jobs that required a background check
- I prefer not to answer

### **Work Requirements & Restrictions**

Are there things a job may ask you to do that could be hard right now, like travel, work hours, lifting, a background check, or a license?

What else about your employment expectations should we know so we can plan in a way that works best for you?

## *Getting Started Assessment Questions: Goal Setting*

### **Occupation Confirmation**

You indicated you were interested in \_\_\_\_\_, are you still interested in this occupation? If no longer interested, the system will allow the Career Planner to update the customer's preferred occupation based on the conversation.

### **Occupation Data Display**

Based on the selected occupation, the system will display: Demand Occupation Status for the selected occupation, and an Occupation output page with relevant labor market information.

# *Getting Started Assessment Questions: Job Requirements & Restrictions*

## **Driving & Transportation**

Does the occupation require a valid driver's license, a clean driving record, reliable transportation, or endorsements (CDL, HazMat)?

## **Legal & Occupational Licensing**

Are there mandatory background checks, fingerprinting, legal requirements, or occupational licensing requirements?

## **Health & Safety**

Are there physical or medical requirements such as lifting, vision, hearing, work settings, drug screening, or immunization?

## **Work Requirements**

Nontraditional hours, prior experience, travel, on-call, extended time away from home, probationary periods, industry credentials, etc.

# *Getting Started Assessment Questions: Training & WIOA Alignment*

## **Training Willingness**

If it is needed, would you be willing to get training or education to reach your career goal?

## **If Yes — System Prompts**

The system will prompt the career planner to discuss with the participant: local policy, Demand Occupation Training List (DOTL), and Individual Training Account (ITA) policies.

## *Getting Started Assessment Questions: Education History*

### **Current Education Status**

Are you currently in school?  
What kind of school or training are you in right now?  
Have you ever received extra help in school (more time on tests, tutoring, other tools)?  
Can you share more about the type of support you received? Add up to the most recent 5 credentials earned.

### **Co-Enrollment Questions**

Have you been enrolled in Adult Education?  
Career/Technical Education (Perkins CTE)? Job Corps?  
YouthBuild? SNAP  
Employment & Training?  
National Farmworker Jobs Program?

### **System Check**

Please use the IDES system to determine whether the customer is currently or previously receiving services in additional programs.

## *Getting Started Assessment Questions: Employment History*

### **Recently Employed**

Based on the work history collected, I see you have worked at [List Employer]. Can you tell me more about the tasks you did, skills you learned, and why you left?

### **Many Jobs**

I see you have had a few different jobs recently. Can you tell me what was going on that led to those changes?

### **Little Work History**

Tell me about times where you have helped your family, volunteered, or spent time on hobbies. These things can show important skills — even if you haven't had a job or only worked a little bit.

### **Teamwork & Conflict**

Can you share a time when you worked really well with someone and got something done together? Also, can you tell me about a time when you didn't agree with someone at work?

### **Disability-Focused**

Are you currently working in a community job (CIE), supported group job, or center-based/facility job? Have you ever had a job with extra support (job coach, employment specialist)? Have you received customized employment support?

## *Getting Started Assessment Questions: Health & Support Needs*

☐ Career Planners will review the customer's responses to each section. Only relevant questions will be asked.

### **General Health**

Do you need any support to be successful in work or school/training? Are there any benefits or general health items you need assistance with? Do you have any upcoming appointments, procedures, or health needs that might keep you from work or training/school? Do you work with a social worker, counselor, or therapist? Would you like information on services or referrals to help with mental health, substance use recovery, or housing/safety support?

### **Disability-Focused**

Tell me more about the type of equipment or features you need to be successful at work or school/training. To help us better support you, please tell us what type(s) of disability apply to you (you may select all that apply, or choose not to answer):


- Physical or health condition (e.g., asthma, diabetes)
- Mobility challenges
- Mental or psychiatric health condition
- Vision
- Hearing
- Learning
- Cognitive or intellectual disability
- I prefer not to answer

### **Program Referrals**

Have you received services or support from any of the following programs or agencies?

- State Developmental Disabilities Agency (SDDA)
- Local or State Mental Health Agency (LSMHA)
- State Medicaid Home and Community-Based Services (HCBS) waiver
- State Vocational Rehabilitation Program (VR)

## *Getting Started Assessment Questions: Transportation*

-  Career Planners will review the customer's responses to each section. Only relevant questions will be asked.

### **Car Concerns**

Do you have any concerns about using your car?  
(Select all that apply)

### **Public Transit Concerns**

Do you have any concerns about using public transportation? (Select all that apply)

### **Additional Needs**

What else would you like to share about your transportation needs?

# *Getting Started Assessment Questions: Childcare & Dependent Care*

 Career Planners will review the customer's responses to each section. Only relevant questions will be asked.

## **Childcare Needs**

You identified you need more reliable childcare. What has made it hard to find reliable childcare? (Select all that apply). Would you like information about childcare services and help with cost? Do you have someone who can help with childcare while you're working or in school/training?

## **Dependent Care Needs**

Can you tell me more about the dependent(s) you take care of? Do you have someone who can help with care while you're working or in school/training? What makes it hard to find dependent care? Would you like information about dependent care services and help with cost?

## **Additional Context**

In the past, when you needed to go somewhere or had other responsibilities, how were you able to arrange childcare or dependent care? What else about your childcare or dependent care should we know so we can plan in a way that works best for you?

## *Getting Started Assessment Questions: Legal Needs*

- Career Planners will review the customer's responses to each section. Only relevant questions will be asked.

### **Legal Assistance & Obligations**

Would you like information about legal assistance? Are there any probation, parole, or aftercare requirements that might affect your work or training schedule? Do you have any outstanding warrants, pending charges, or court dates scheduled?

### **Justice-Involved Programs**

Have you ever been in a program that helped you find a job or learn new skills after being involved with the justice system? These programs help people build work skills, find support, and get jobs after leaving jail or prison, or after being on probation or parole.

### **Additional Context**

What else about your legal needs should we know so we can plan in a way that works best for you?

## *Getting Started Assessment Questions: Financial Needs*

 Career Planners will review the customer's responses to each section. Only relevant questions will be asked.

### **Pay & Money Concerns**

How do you plan to get your paycheck — direct deposit or another way? Do you have any money or credit concerns? (Select all that apply). Have you ever received help understanding your benefits or managing your money?

### **Housing & Basic Needs**

Are you worried about paying for your housing in the next 6 months? Would you like information about housing support? Would you like information about clothing services or referrals? Would you like information about services that can help you when you move out of aftercare?

### **Additional Tools**

Extra Income Assessments, Expense Worksheet. What else about your money needs should we know so we can plan in a way that works best for you?

## *Getting Started Assessment Questions: Veteran Information*

 Career Planners will review the customer's responses to each section. Only relevant questions will be asked.

### **Military Service**

When did you serve in the military? Did you earn a campaign or expeditionary medal while serving? Do you have a disability connected to your military service?

### **Veteran Programs**

Have you ever received help from a veterans' employment specialist through the Veteran Readiness and Employment program (VR&E)? Would you like information about programs that can support you as a veteran?

### **Family & Additional Context**

Are you related to someone who is serving or has served in the military? What else about your veteran status should we know so we can plan in a way that works best for you?

## *Getting Started Assessment Questions: Additional Demographics*

### **Cultural & Language Barriers**

Do you feel that your culture, customs, or the language you speak make it hard for you to get or keep a job?

### **Farmworker Status**

Do you or your family work in the farming or fishing industry?

### **Indian & Native American Program**

Did you ever get services through the Indian and Native American program? These programs are specially designed to help Native Americans with education, job training, and finding work. You may have received services in another state or been given tools or resources to use on your own.

### **Senior Community Service Employment**

Have you ever been in a program that helped you, as an older adult, learn new job skills or find work in the community? This is commonly referred to as the Senior Community Service Employment Program (SCSEP).