



Customer Follow Up – Transition

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

This document is intended to explain how to view and use the Follow Up Customer Transition section of the Application in the IWDS 2.0 System.

Audience

This document is designed to guide both trainers and end users through the process of viewing and utilizing the Customer Transition Follow Up Page in the IWDS 2.0 system.



Navigate to Application Summary – Transition

- Log into IWDS 2.0. ([Link](#))
- From the Customers page, select the Customer last name. The customer must have an application.
- In the customer profile, in the **Application** section, use the **Eye icon** to view the customer application.
- The Application Summary will display. Select **Follow Up** from the dropdown menu, and the **Transition** tab.

Name	App Date	J#	Program	Sub-Program	Status	TI	Career Planner	TI	Actions
Scarlett Adams			WIOA	Trade	Applicant		VICKY MILLER		

1 Entry Page 1 of 1 << < 1 > >> 1 10

Customer Profile: Lena Chau >

Application Summary >

What Area Do you Want to Work in?
Follow-Up

Transition Exit Summary Occurrence or Activity

Sections

General Transition Information	General Transition Information
LWIA	Office
0 - Land of Lincoln Workforce Alliance	N/A
Career Planner Assigned SALLY PFLIBSEN	Last Communication Date N/A
Last Service End Date 02/25/2026	Last Service Received Workforce Preparation Skills

- **Note** – The Quick Links will also display the Transition tab.

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IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Transition Page Details

- The transition Page has 3 sections.
- General Transition Information** – This is View only information to provide the user with general information relevant to transition for the customer.
- Career planning Checklist** – This is an area for the Career Planner to check on progress on outcomes and goals. Clicking the Quick Links, will bring the user to the selected area to update outcomes and goals & objectives where necessary.
- Transition Process** – This area enables the career planner to enter a reason for transition to exit. Selecting the toggles will open Employment and Education information. If no information is tied, the Career Planner can use the Quick Links to update either section.

Career Planning Checklist

Have you entered all outcomes and closed goals?	Outcome Completion
<input type="checkbox"/> Credentials Quick Link	03/03/2026
<input type="checkbox"/> Measurable Skill Gains Quick Link	N/A
<input type="checkbox"/> Employment Quick Link	N/A
<input type="checkbox"/> Education Enrollment Quick Link	N/A
<input type="checkbox"/> Goals & Objectives Closed Quick Link	—

Transition Process

Transition Reason

Select a reason ▼

The customer is employed at transition.

Employment [Quick Link](#)

No employment record selected. Please navigate to the Employment tab to add or select a record.

The customer is enrolled in education at transition.

Education Enrollment [Quick Link](#)

No education enrollment record selected. Please navigate to the Education tab to add or select a record.

- Note** – Some Transition reasons will auto check the Excluded from Performance checkbox.

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