



Add & Edit Goals & Objectives on Career Plan

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

This document is intended to explain how to add, view and Goals and Objectives on a customer career plan in IWDS 2.0.

Audience

This document is designed to guide both trainers and end users through the process of adding and editing goals and objectives on a customer career plan in the IWDS 2.0 system.



Navigate to Customer Career Plan

- Log into IWDS 2.0. ([Link](#))
- Select **Customers**.
- The View Customers Page is displayed.
- The View Customers page is a two-panel page with the **Search Filter** on the left and the **List View** on the right.
- Select the customer **Last Name** with an application.
- Scroll to the Applications section of the customer profile – select the **View** icon.

Last Name	First Name	Preferred Name	Date of Birth	Number of Applications	LWIA	Zip Code
Adams	Scarlett	N/A	04/04/2007	1	20	62701
Adams	Scarlett	N/A	10/02/1994	0	N/A	62701
Alvarez	Sergio	N/A	03/15/1980	0	N/A	62711
Alvarez	Sophia	N/A	03/30/1987	0	N/A	60439
anderson	james	N/A	01/25/2008	0	N/A	62704
Anderson	Michael	N/A	05/22/1988	0	N/A	60087
Anderson	robie	N/A	12/21/2007	1	20	62704
Bain	Christa	N/A	11/08/1982	0	N/A	62025
Baker	Kennedy	N/A	02/21/2008	0	N/A	61761
Bell	Audrey	N/A	05/04/2005	0	N/A	60604

Name	App Date	Program	Sub-Program	Status	Career Planner	Actions
Scarlett Adams		WIOA	Youth (WIOA 1Y)	Applicant	VICKY MILLER	

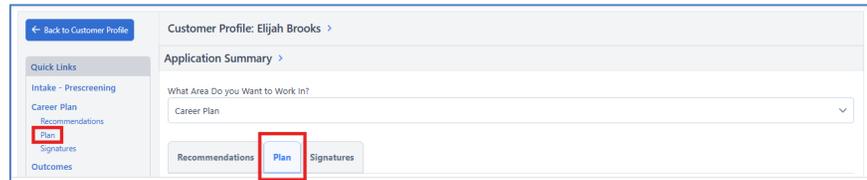
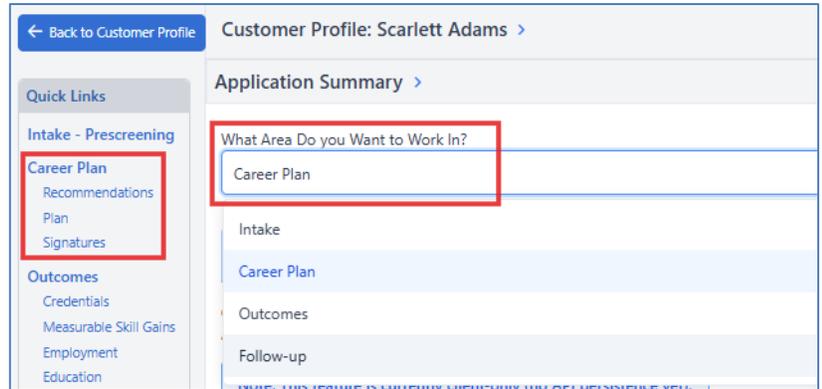
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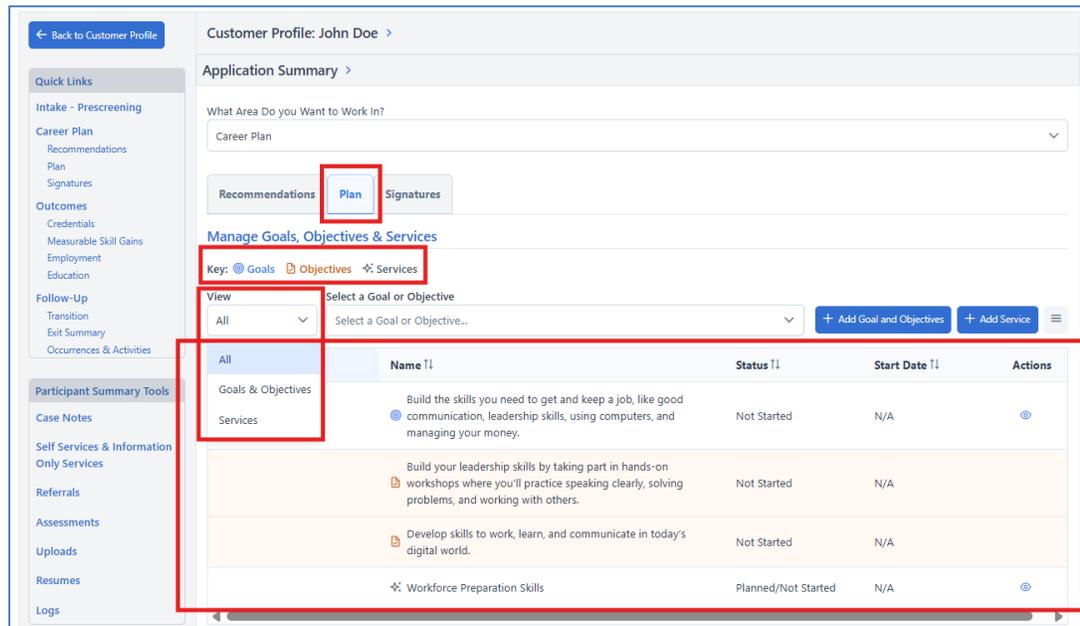
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- In the “Which Area do you want to work in” drop-down, select Career Plan.
 - Note** – you can also utilize the quick links on the left to access the Career Plan
- The Career Plan is divided into 3 tabs – Select the **Plan** tab or **Plan quick link**.



View Goals and Objectives

- The Career Plan consists of Goals, Objectives and Services that have been added to a Customer by the system or Career Planner.
- Under the Plan tab, use the View drop down menu to **View All**.



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- **Note** – use the **Select a Goal or Objective drop down** to filter the list.
- **Note** – Utilize the Sort Icon in each column as needed and the Hamburger menu to add additional columns to the table.
- Select the **Eye** icon to View Goals and Objectives on the Career Plan.
- Selecting the Eye icon allows for editing a goal when needed with the **Edit Goal and Edit Objective** Buttons. Use the chevrons to expand the section.
- Editing the Goal or Objective will open the screen to make changes or delete a goal or objective.

Type	Name	Status	Start Date	Actions
Follow-Up	Keep a steady job in [specific field/occupation] and meet regularly with a career planner to talk about your job, set goals, and build on your success at work.	In Progress	N/A	
	Earn new certifications or licenses to help you qualify for better jobs and grow in your career.	In Progress	N/A	

Goals & Objectives

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Follow-Up Goal - Keep a steady job in [specific field/occupation] and meet regularly with a career planner to talk about your job, set goals, and build on your success at work.

[Edit Goal](#) [Remove Goal](#)

Term
Short Term (Less than 6 months)

Status
In Progress

Planned End Date
N/A

Actual Start Date
N/A

Actual End Date
N/A

Program(s) the goal is associated with.
WIOA - Adult (WIOA 1A)

Comments
N/A

Objective - Earn new certifications or licenses to help you qualify for better jobs and grow in your career.

[Edit Objective](#) [Remove Objective](#)

Status
In Progress

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Add Goals & Objectives to Career Plan

- To add a service to the Career Plan, Filter the View to Goals & Objectives, then Select **Add Goal and Objectives**

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: Goals Objectives Services

View: **Goals & Objectives** Select Goal Type: Select a type... **+ Add Goal and Objectives**

- Note** – Goals and Objectives must be added before a service can be added
- After selecting Add Goal and Objectives, the Add Goals Page will display. Select the Goal Type in the drop down menu and the appropriate fields will display.
- After completing the goal portion of the page, the user is required to **Add at least one objective** to the goal. Complete the fields associated with the objective.

Goals & Objectives

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Add Goals

What type of goal are you adding?*

+ Add Another Objective [Save & Add Service](#) [Save Goal/Objectives](#) [X Cancel](#)

Goals & Objectives

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Add Goals

What type of goal are you adding?*

[+ Add Another Objective](#) [Save & Add Service](#) [Save Goal/Objectives](#) [X Cancel](#)

- From here the user can **Add Another Objective, Save & Add Service, or Save Goal/Objectives** on the Career Plan.
- Save and Add Service** will Open to the Add Services page.
 - [Quick Start Guide for Adding Services to the Career Plan.](#)

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The Illinois workNet Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711. This workforce product was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration.

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