

UAT Guide – Release #14, Cycle 1

Career Plan - Services

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Overview

User Acceptance Test (UAT) Release #14 cycle 1, has been deployed to the SIU UAT environment. Security constraints for this environment will require a login through the State Login Portal. When you follow the link to the UAT environment, the system will route the user to the State of Illinois Login. After a successful login, the user will be returned to the UAT environment where IWDS-2.0 is running.

When the user is returned to the UAT environment, there will be NO security role permission constraints to access the application at this time. Security permissions will be deployed later.

It is still important not to enter any personal identifiable information (PII).

Purpose

The purpose of Release #14 cycle 1 is to review **Services** and *how they relate* to **Goals & Objectives** on the **Career Plan**. The UAT cycle will be open from **March 5th – March 19th, 2026**. This provides you with 10 working days to complete the review. Your participation is appreciated.

UAT Release #14 – Cycle 1 Expectations & Homework

Homework Areas

For this week, UAT tasks will focus on the following key areas listed below:

- Navigating to the Career Plan
- Career Plan List View (All)
- Career Plan List View (Goals & Objectives)
- Adding a Goal & Objectives
- Viewing a Goal & Objectives
- Editing a Goal & Objectives
- Career Plan List View (Services)
- Adding a Service
- Viewing a Service
- Editing a Service

Due Date

Please complete your testing in these areas and submit your feedback by **EOD Thursday, March 19th**. This will give us an opportunity to address any issues prior to the next release.

Access to UAT Environment

To access the UAT environment in your browser, follow the link provided here.

<https://testapps.illinoisworknet.com/iwdst-Preview>

Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our shared notebook - [UAT Reporting Notebook](#) . The main purpose of using a shared notebook is for collaboration between members of the UAT team and Business Analysts. This will cut down on duplicate issues being reported.

When logging your entries:

- You should document this information as you are completing your UAT work.
 - The first page of the notebook is labeled as Example Issue Reporting. Please refer to that page to get an idea of how you can report an issue.
 - In the notebook, you will find a section labeled Release #14 – Cycle 1. The section is divided into several pages; each page is specific to the pages of the training plan. Ensure that each item is tracked under the correct category for the cycle and feature set you are providing feedback on.
 - Be concise but detailed.
 - If multiple issues arise in one area, log each one separately for clarity.
 - Please add your name/initials to your entry.
- **If you have issues accessing the OneNote notebook-** Please contact one of the Business Analysts (BA) on the team. The business analysts are:
 - Laura Menke - laura.menke@siu.edu
 - Andi Grabemeyer - andi.grabemeyer@siu.edu
 - Al Menke - al.menke@siu.edu
 - Olivia Miller - olivia.miller@siu.edu
 - Lynette Tritz - lynette.tritz@siu.edu

Expectations for UAT

As you test these areas, please keep in mind the following best practices:

- **Test Thoroughly:** Ensure that you navigate through all functions and features within these areas. Pay attention to any discrepancies between expected and actual results. Please explain your expected results and the actual results you found.
- **Detail-Oriented:** When reporting issues, provide as much context as possible, including:
 - Steps to reproduce the issue
 - Screenshots or recordings, if possible

- Browser or device used during testing
- Actual outcome vs. Expected outcome
- **Feedback Categories** – The SIU team will categorize your findings into three (3) possible classifications.
 - **Bugs**- When the system does not perform as expected, and the system is not performing according to the requirements, then a bug will be reported, tracked, fixed, and retested.
 - **Issues**- If the system is performing according to the requirements, but the user feels that the requirement was not captured correctly or now the user feels like the requirement is just not working as expected, then this is recorded as an issue. Issues are tracked and prioritized for change.
 - **Enhancements**- Once we are in UAT and the users recognize an area that could be improved, then this will be also logged as an issue and tagged as an enhancement.

Best Practices for Effective UAT

- **Think like the end user:** Approach your testing from the perspective of someone unfamiliar with the system. This will help us identify usability issues and areas for improvement.
- **Be specific and thorough:** The more specific your feedback, the easier it will be to address. Include specific steps, expected outcomes, and actual results.
- **Provide context:** Always give context for your feedback. For instance, explain why an enhancement would improve the user experience or system performance.

By following these guidelines and providing detailed feedback, you're helping to ensure the final product meets user expectations and performs as intended.

Step-by-Step Guide

Managing the career plan is an essential part to assist a customer in reaching their goals. This UAT will focus on adding Services to the customer's career plan and associating those services with Goals & Objectives. The career plan is in the context of an application for one or more programs that a customer is eligible. In IWDS-2.0 the career plan is a universal career plan, dynamic and active, replacing the previous hard copy Individual Employment Plan (IEP) and Individual Service Strategy (ISS).

Note: In IWDS-2.0, a service must be associated with a goal and objective. Currently the system will allow the user to add a service that is not associated with a goal and objective. In the next release, this system will not allow the user to add a service without first having a goal and objective in the plan.

Navigating to the Career Plan

Before getting into the essential elements of working with the Career Plan, we will discuss the steps necessary to access a customer, their active application, and navigation to the career plan area.

Note: In the current system we have not associated the user with a career planner role or LWIA. Because of this, you will see all customers on the customer landing page, and it will not default to a specific LWIA's or career planner's customer.

Select **Customers** from the main menu. This will navigate to the **Customers** management landing page.



The **Customers' landing page** is a two (2) panel page with a **Search Customers panel** on the left and a **View Customers panel** below.

Note: Since the customer search panel has been covered in multiple UAT sessions, it will not be covered here, we will go directly to selecting the customer.

Search Customers ←

Switch View

Name Quick Search Full Search

Date of Birth

SSN Last 4

Programs
Select a Program...

Status
Select a status...

Advanced Search >

Search Reset

View Customers

Customers Applications Pre-Record Intake

+ Add Customer

| 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 | Sophia | N/A | 03/30/1987 | 1 | 20 | 60439 |
| anderson | James | N/A | 01/25/2008 | 0 | N/A | 62704 |
| Anderson | robie | N/A | 12/21/2007 | 1 | 20 | 62704 |
| Baker | Kennedy | N/A | 02/21/2008 | 0 | N/A | 61761 |
| Bell | Audrey | N/A | 05/04/2005 | 0 | N/A | 60604 |
| Bennett | James | N/A | 06/22/2007 | 0 | N/A | 60606 |
| Brooks | Elijah | N/A | 12/20/2007 | 1 | 20 | 61801 |
| Brooks | Elijah | N/A | 02/22/2008 | 0 | N/A | 61801 |

53 Entries Page 1 of 6 << < 1 2 3 4 5 > >> 1 10

When you find the **Customer** with an **Application** in the list that you want to work with, the first column contains the **Last Name** as a link (to the customer profile) that is underlined. Select the **Name link** for the customer that you want to work with.

Search Customers

Switch View

Name Quick Search Full Search

Date of Birth

SSN Last 4

Programs
Select a Program...

Status
Select a status...

Advanced Search >

Search Reset

View Customers

Customers Applications Pre-Record Intake

+ Add Customer

| Last Name | First Name | Preferred Name | Date of Birth | Number of Applications | LWIA | Zip Code |
|--------------------------|------------|----------------|---------------|------------------------|------|----------|
| Monroe | Katelyn | N/A | 06/21/2007 | 0 | N/A | 62458 |
| Morgan | Alex | N/A | 02/02/2008 | 0 | N/A | 62704 |
| Morgan | Caleb | N/A | 04/20/1981 | 0 | N/A | 60101 |
| Morris | Jackson | N/A | 07/02/1991 | 0 | N/A | 60611 |
| Morris | Marcus | Mark | 09/02/2000 | 1 | 10 | 62629 |
| Nguyen | Zoe | N/A | 09/10/1999 | 0 | N/A | 60208 |
| O'Connor | Liam | N/A | 07/22/1995 | 0 | N/A | 60613 |
| Ortiz | Jonathan | N/A | 02/04/1983 | 0 | N/A | 62701 |
| Parker | Peter | N/A | 09/15/1995 | 0 | N/A | 62711 |
| Parker | Peter1 | N/A | 02/09/2000 | 0 | N/A | 62722 |

120 Entries Page 8 of 12 << < 6 7 8 9 10 > >> 8 10

Note: Each UAT user will be issued a customer persona, please find that customer in the list and select it.

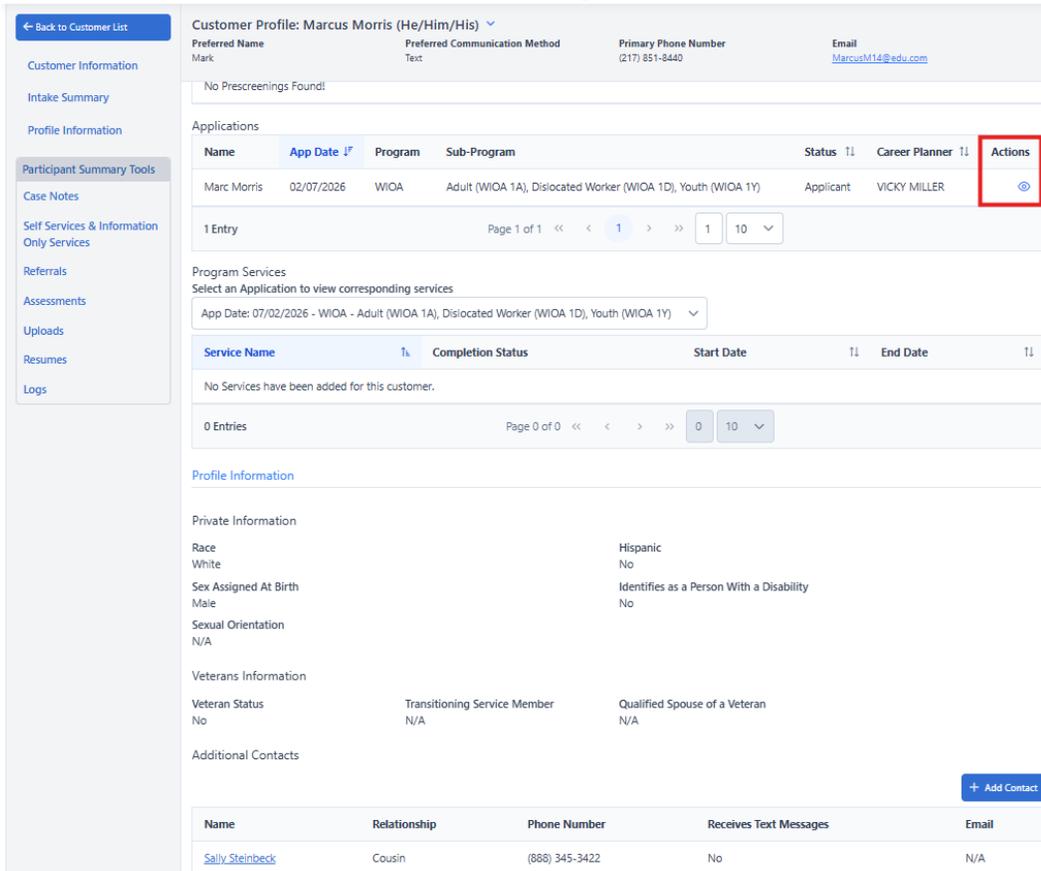
After selecting the **customer link**, the **Customer Profile** page will open. View the page and get familiar with it.

This screen is showing the **top half** of the **View Page**.

Note: This page is going through multiple upgrades to improve its look and feel. Your focus will be on finding the application

Find the **Applications** section in the middle of the page to see the active application in a grid. The **Actions View Icon** is located at the far right of the row.

This screen shows the **bottom half** of the **View Page**.



Customer Profile: Marcus Morris (He/Him/His) >

Preferred Name: Mark
 Preferred Communication Method: Text
 Primary Phone Number: (217) 851-8440
 Email: MarcusM14@edu.com

No Prescreenings Found!

Applications

| Name | App Date !? | Program | Sub-Program | Status !? | Career Planner !? | Actions |
|-------------|-------------|---------|---|-----------|-------------------|---|
| Marc Morris | 02/07/2026 | WIOA | Adult (WIOA 1A), Dislocated Worker (WIOA 1D), Youth (WIOA 1Y) | Applicant | VICKY MILLER |  |

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

Program Services
 Select an Application to view corresponding services
 App Date: 07/02/2026 - WIOA - Adult (WIOA 1A), Dislocated Worker (WIOA 1D), Youth (WIOA 1Y)

| Service Name | Completion Status | Start Date | End Date |
|--|-------------------|------------|----------|
| No Services have been added for this customer. | | | |

0 Entries Page 0 of 0 << < > >> 0 10

Profile Information

Private Information
 Race: White
 Sex Assigned At Birth: Male
 Sexual Orientation: N/A
 Hispanic: No
 Identifies as a Person With a Disability: No

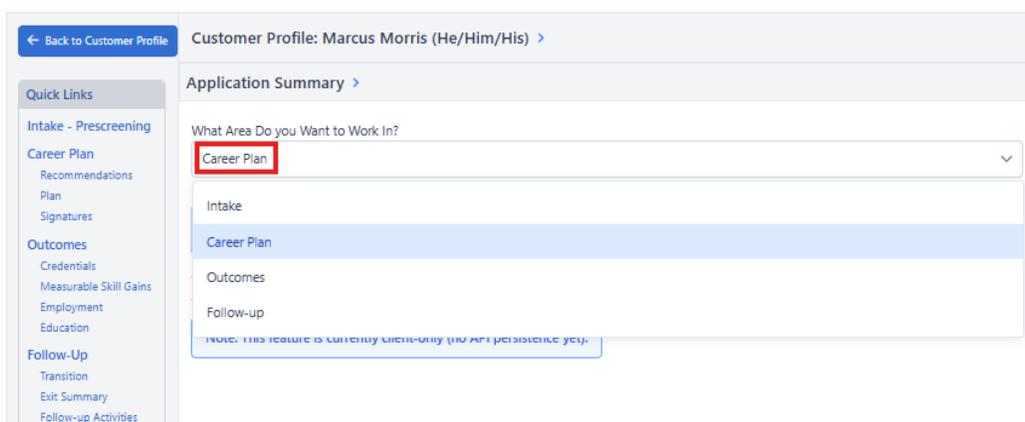
Veterans Information
 Veteran Status: No
 Transitioning Service Member: N/A
 Qualified Spouse of a Veteran: N/A

Additional Contacts

| Name | Relationship | Phone Number | Receives Text Messages | Email |
|-----------------|--------------|----------------|------------------------|-------|
| Sally Steinbeck | Cousin | (888) 345-3422 | No | N/A |

When selecting the **Actions View Icon**, it moves the user to the “What Area Do You Want to Work In?”.

Select the Career Plan in the “What Area Do You Want to Work In?” selection dropdown.



Customer Profile: Marcus Morris (He/Him/His) >

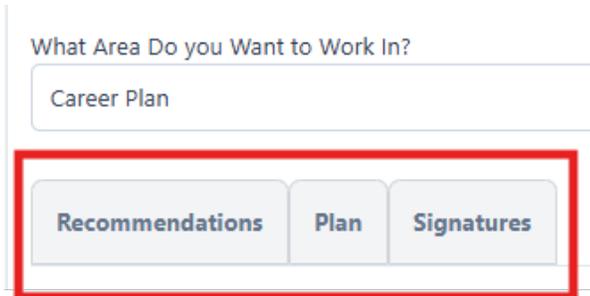
Application Summary >

What Area Do you Want to Work In?
Career Plan

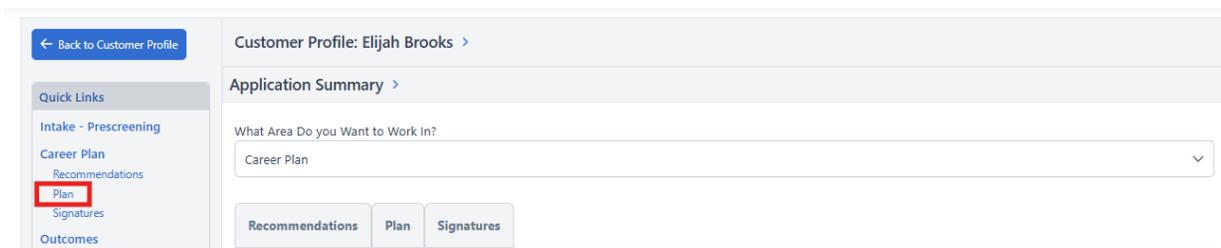
- Intake
- Career Plan**
- Outcomes
- Follow-up

NOTE: This feature is currently client-only (no API responses yet).

After selecting the **Career Plan** area, a three-tab page is displayed with **Recommendations** as the first tab, **Plan** as the second tab, and **Signatures** as the third tab.



There are two ways to navigate to the **Plan** in the **Career Plan** area. First, notice the **Quick Links** section in the left navigation panel. Click on **Plan link**.



The system will navigate to the Career Plan area, and the Plan tab should be in focus.



Second, in the Career Plan area, notice the **Plan tab**. Select the **Plan Tab**.



After selecting the **Plan Quick Link** or **Plan tab**, the Customer Profile page appears. Select the [**Back to Customer Profile**] button.

Customer Profile: Elijah Brooks

Preferred Name: Elijah | Preferred Communication Method: N/A | Primary Phone Number: (217) 555-0105 | Email: Brooks@fakemail.com

Application Summary

What Area Do you Want to Work In?
 Career Plan

Recommendations | **Plan** | Signatures

Manage Goals, Objectives & Services

Key: Goals | Objectives | Services

View: Services | Select a Goal or Objective: Select a Goal or Objective... | Show Unassigned Services Only | + Add Service

The system routes back to the **Customer Information** page.

Customer Profile: Elijah Brooks

Customer Information [Edit]

| | | |
|---------------------------------------|---|--|
| First Name Elijah | Middle Initial N/A | Last Name Brooks |
| Preferred Name Elijah | Primary Phone Number (217) 555-0105 | Address 1401 W Green St Urbana, IL 61801 |
| Pronouns N/A | Primary Phone Receives Text Messages N/A | Email Brooks@fakemail.com |
| Date of Birth 12/20/2007 | Secondary Phone Number (217) 555-0115 | Preferred Communication Method N/A |
| Age 18 years, 2 months, 4 days old | Secondary Phone Receives Text Messages N/A | LWIA N/A |
| IwN ID 0 | IwN Username N/A | |

Select the [**Back to Customer Profile**] button. The system routes back to the **View Customers** page.

View Customers

Customers | Applications | Pre-Record Intake

| 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 |

Career Plan List View (All)

The active career plan is shown on the Plan tab. The **Career Plan** consists of **Goals, Objectives** and **Services** that have been added by the system automatically or by the career planner from the Recommendations page, or manually by the career planner.

Select the **Plan** tab (*below*). The system now displays the Career Plan with a grid of **Goals, Objectives**, and **Services**.

In the middle of the tab page there is an **Icon Key** depicting an icon for the **Goal**, the **Objectives**, and the **Services**.

Under the icon key is the switch **View** dropdown filter. This filters the list to (**All, Goals & Objectives**, or **Services**).

Customer Profile: John Doe >

Application Summary >

What Area Do you Want to Work In?
Career Plan

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: ● Goals ▢ Objectives ✦ Services

View: All | Select a Goal or Objective: Select a Goal or Objective... | + Add Goal and Objectives | + Add Service

| View | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|--------------------|--|---------------------|---------------|---------|
| All | | | | |
| Goals & Objectives | | | | |
| Services | | | | |
| | Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. | Not Started | N/A | 👁 |
| | Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. | Not Started | N/A | |
| | Develop skills to work, learn, and communicate in today's digital world. | Not Started | N/A | |
| | ✦ Workforce Preparation Skills | Planned/Not Started | N/A | 👁 |

To the right of the **View All** filter is the **Select a Goal or Objective** dropdown filter. This filters the list of goals and objectives associated with a service.

View: All | Select a Goal or Objective: Select a Goal or Objective... | + Add Goal and Objectives | + Add Service

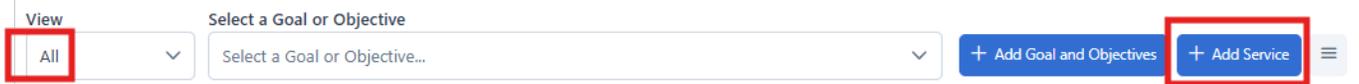
Type ↓

- 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.
- ▢ Earn new certifications or licenses to help you qualify for better jobs and grow in your career.
- ▢ Talk with your career planner every month for a year to help with your job and future career.
- ▢ Learn and use ways to solve problems at work to handle tough situations and keep moving forward.

To the right of **Select a Goal or Objective** dropdown there is an **[Add Goal and Objectives]** button. This routes to the Add Goals page.



To the right of the **[Add Goal and Objectives]** button is an **[Add Service]** button. This appears when the list is filtered to **All**, or **Services**.



To the right of the **[Add Service]** button is the column selector **hamburger icon**. The column selector hamburger icon provides the user with a way to add or remove columns from the grid.



The View filter dropdown selection defaults to **All**. Under the filters and buttons row is the grid listing **Goals**, **Objectives**, and **Services** that have been added to the plan.

[← Back to Customer Profile](#)

Quick Links

- Intake - Prescreening
- Career Plan
 - Recommendations
 - Plan
 - Signatures
- Outcomes
 - Credentials
 - Measurable Skill Gains
 - Employment
 - Education
- Follow-Up
 - Transition
 - Exit Summary
 - Occurrences & Activities

Participant Summary Tools

- Case Notes
- Self Services & Information
- Only Services
- Referrals
- Assessments
- Uploads
- Resumes
- Logs

Customer Profile: John Doe

| | | | |
|------------------------|---------------------------------------|-----------------------------|---|
| Preferred Name John | Preferred Communication Method N/A | Primary Phone Number N/A | Email test@test.com |
|------------------------|---------------------------------------|-----------------------------|---|

Application Summary

| | | | |
|-----------------|----------------------------------|---------------------------------|--------------------------------|
| Program WIOA | Subprogram(s) Adult (WIOA 1A) | Application Status Applicant | Application Date 02/21/2026 |
|-----------------|----------------------------------|---------------------------------|--------------------------------|

What Area Do You Want to Work In?
Career Plan

Recommendations | **Plan** | Signatures

Manage Goals, Objectives & Services

Key: ● Goals | 📌 Objectives | ⚙️ Services

View: **All** | Select a Goal or Objective

| Type | Name | Status | Start Date | Actions |
|--------------|--|---------------------|------------|---------|
| ▼ Employment | Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. | Not Started | N/A | 🔗 |
| | Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. | Not Started | N/A | |
| | Develop skills to work, learn, and communicate in today's digital world. | Not Started | N/A | |
| ⚙️ | Workforce Preparation Skills | Planned/Not Started | N/A | 🔗 |

In the rows, prior to the first column, the user will see an **expand/collapse chevron**. This chevron will expand the goal to show the **objectives** and **services** associated with the goal.

| Type ↓↑ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions | |
|---------|------------|---|-----------------------|------------|---|
| > | Training | Finish a Registered Apprenticeship Program to achieve recognized certification. | Not Started | N/A | ⊙ |
| > | Training | Earn a Credential in [specific area (CIP)?] to help get a better job. | In Progress | N/A | ⊙ |
| > | Training | Finish a training program to learn job skills in [occupation (ONET)]. | Not Started | N/A | ⊙ |
| ∨ | Employment | Get a part-time or seasonal job while working on your career planning, job training, or school goals. | Completed | 02/18/2026 | ⊙ |
| | | Attend job fairs and career events to learn about different job opportunities. | Completed | N/A | |
| | | ✦ OJT - Private Sector | Open | 02/18/2026 | ⊙ |
| | | ✦ Out-of-Area Job Search/Relocation Assistance | Successful Completion | 02/19/2026 | ⊙ |
| | | ✦ Career Exploration or Youth Career Planning or Career Awareness, Guidance, and Exploration | Planned/Not Started | N/A | ⊙ |

In the first column is the **Goal Type**. Goal types are only displayed in goal rows. In the column header, to the right of the **Type** label, is a **sort icon**. This icon sorts the list alphabetically toggling between ascending and descending order.

| Type ↓↑ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|---------|---------|-----------|---------------|---------|
|---------|---------|-----------|---------------|---------|

In the Second column is the **Name**. Each row has a name corresponding to a **Goal**, **Objective**, or a **Service**. In the column header to the right of the **Name** label, is a **sort icon**. This icon sorts the list by Goal name alphabetically toggling between ascending and descending order.

| Type ↓↑ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|---------|---------|-----------|---------------|---------|
|---------|---------|-----------|---------------|---------|

In the third column is the **Status**. Statuses will show on every row. In the column header to the right of the **Status** label, is a **sort icon**. This icon sorts the list by Goal status toggling between ascending and descending order.

| Type ↓↑ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|---------|---------|-----------|---------------|---------|
|---------|---------|-----------|---------------|---------|

In the fourth column is the **Start Date**. Start Dates for goals and objectives are derived by the start date on the associated services. To the right of the **Start Date** label, is the **sort icon**. This icon sorts the list by the Goal Start Date toggling between ascending and descending order.

| Type ↓ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|--------|---------|-----------|---------------|---------|
|--------|---------|-----------|---------------|---------|

In the fifth column is the **Actions**. The column has a view icon for each Goal and Service Row. When selected it takes the user to the view details page. Of the corresponding Goal or Service accordingly. Objectives are viewed with the Goals.

| Type ↓ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|--------|---------|-----------|---------------|---------|
|--------|---------|-----------|---------------|---------|

In the sixth column is the **Hamburger Icon**. The column selector hamburger icon provides the user with a way to add or remove columns from the grid.

View: All | Select a Goal or Objective: Select a Goal or Objective... | + Add Goal and Objectives | + Add Service | ☰

Career Plan List View Goals and Objectives

Career planners can **view Goals & Objectives** on the career plan using the **Plan** tab. By selecting the All filter or the Goals & Objectives filter in the plan, Goals will show in rows on the plan.

In the **Plan** tab, make sure the view filter is set to **Goals & Objectives** by selecting the View drop-down and selecting **Goals & Objectives**.



On each Goal row, in the **Actions** column is a view icon. Select one of the **view icons**.

| Type ↓↑ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|----------|--|-------------|---------------|---------|
| Training | Finish a Registered Apprenticeship Program to achieve recognized certification. | Not Started | N/A | |
| | Complete all steps to become an apprentice in an appropriate U.S. DOL Registered Apprenticeship program. | Not Started | N/A | |

Selecting the **view icon** will open the **view page** for that goal and associated objectives.

Goals & Objectives

[← Back to Career Plan](#)

🕒 Training Goal - Finish a Registered Apprenticeship Program to achieve recognized certification. ^

[Edit Goal](#)

Term
Short Term (Less than 6 months)

Status
Not Started

Planned End Date
02/2026

Actual Start Date
N/A

Actual End Date
N/A

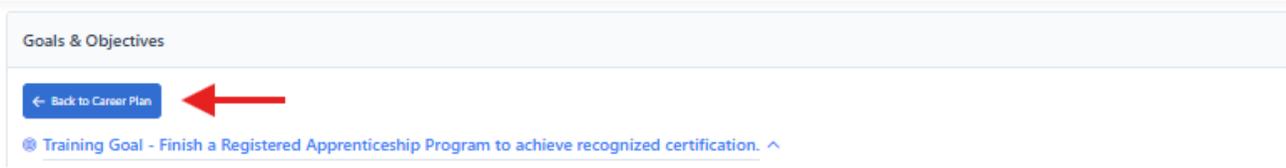
Program(s) the goal is associated with.
WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Youth (WIOA 1Y), WIOA - Adult (WIOA 1A), WIOA - Adult (WIOA 1A)

Comments
N/A

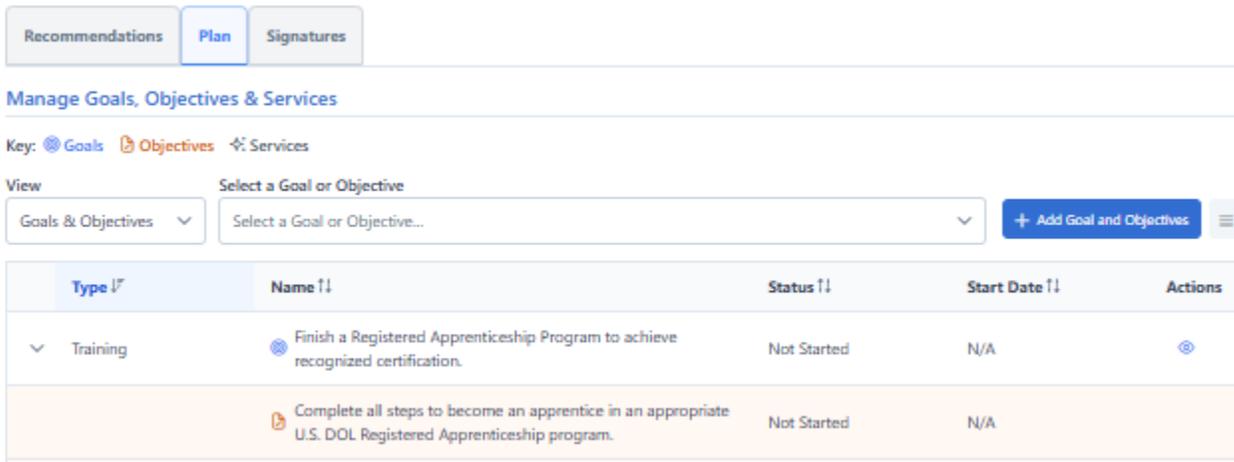
🔗 Objective - Complete all steps to become an apprentice in an appropriate U.S. DOL Registered Apprenticeship program. v

🔗 Objective - Take part in and complete related training instruction (RTI). v

Select the [Back to Career Plan] button.



The system will return to the Plan tab of the career plan.



Adding a Goal & Objective

Career planners can **add Goals & Objectives** to the career plan using the **Plan** tab. By selecting the All filter or the Goals & Objectives filter in the plan, the Add Goal and Objectives button will be available.

In the **Plan** tab, make sure the view filter is set to **Goals & Objectives** by selecting the View drop-down and selecting Goals & Objectives.



At the top right of the grid there will be a [+ Add Goal and Objectives] button.

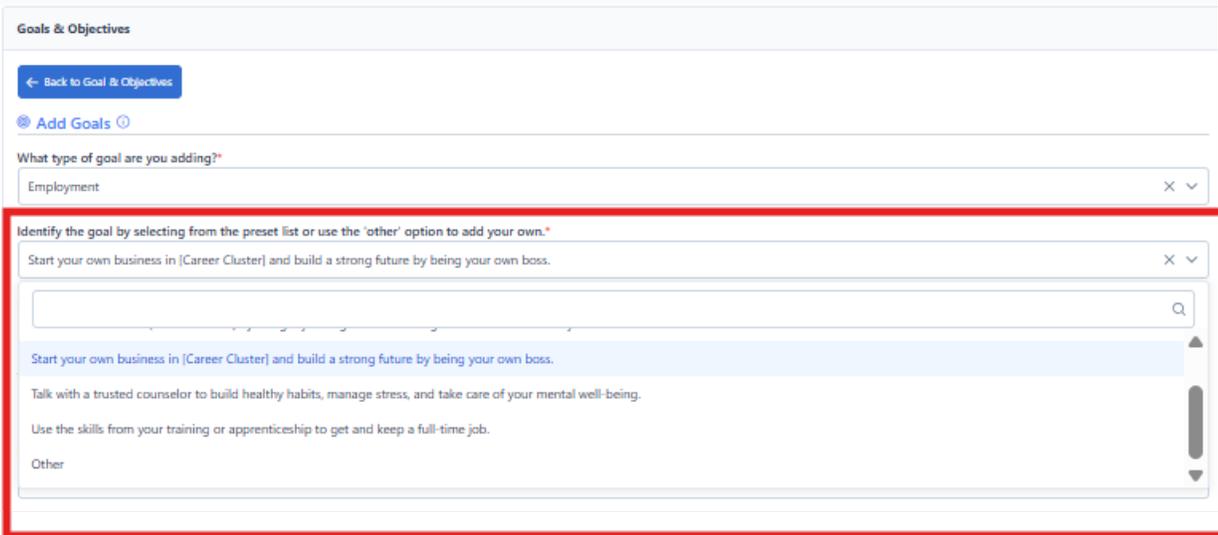


Select the **[+ Add Goal and Objectives]** button. The system will display the Add Goals & Objectives page.

The first field is the **What type of goal are you adding?** This is a required field. Select from the drop-down the desired type. (Employment, Education, Training, Supportive Services, Follow-Up, Other, Goal Not Listed).

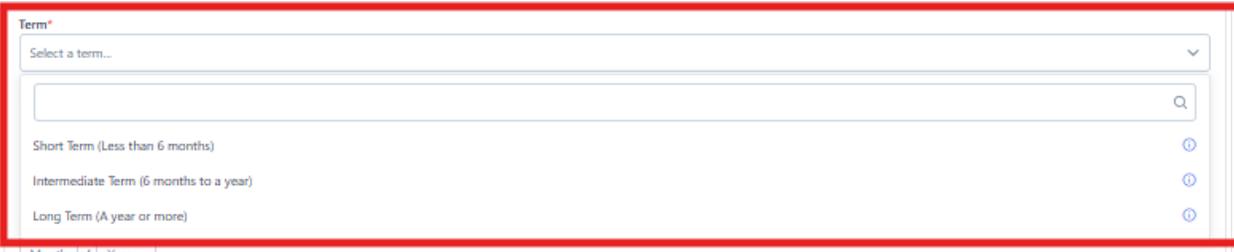
When a **Goal Type** is selected, other fields open on the page.

The second field is to Identify the **goal** by selecting from the preset list or use the 'other' option to add your own. This is a dropdown to select a Goal. The Goals in this list are not currently on the plan. Select the desired goal.



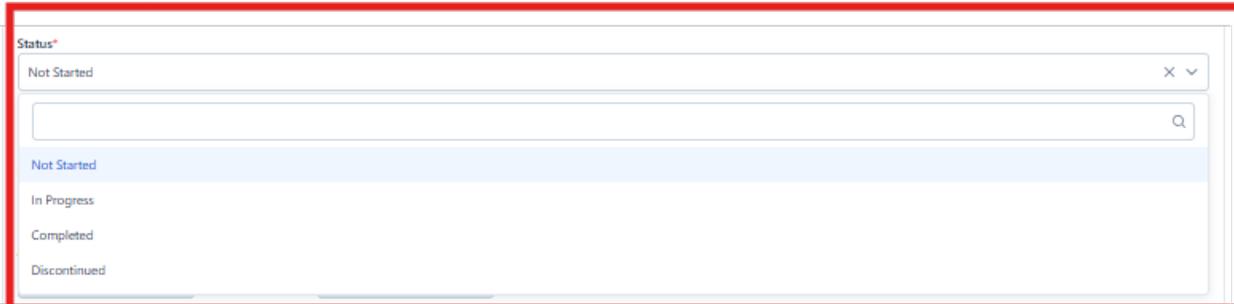
The screenshot shows the 'Goals & Objectives' section of a web form. At the top, there is a blue button labeled '← Back to Goal & Objectives' and a link 'Add Goals'. Below this is a dropdown menu titled 'What type of goal are you adding?' with 'Employment' selected. The main dropdown menu is open, displaying a list of goal options. The first option is 'Start your own business in [Career Cluster] and build a strong future by being your own boss.', which is highlighted in blue. Other options include 'Talk with a trusted counselor to build healthy habits, manage stress, and take care of your mental well-being.', 'Use the skills from your training or apprenticeship to get and keep a full-time job.', and 'Other'. A search bar is visible above the list.

The third field is the **Term**. There are three (3) term choices. (Short Term, Intermediate Term, Long Term). Select the desired **term**.



The screenshot shows the 'Term' dropdown menu. The dropdown is open, showing three options: 'Short Term (Less than 6 months)', 'Intermediate Term (6 months to a year)', and 'Long Term (A year or more)'. Each option has a small circular icon to its right. A search bar is located above the list.

The fourth field is the **Status** of the Goal. There are four (4) status options. (Not Started, In Progress, Completed, Discontinued). Select **Not Started**.



The screenshot shows the 'Status' dropdown menu. The dropdown is open, showing four options: 'Not Started', 'In Progress', 'Completed', and 'Discontinued'. Each option has a small circular icon to its right. A search bar is located above the list.

The fifth field is the **Planned End Date**. End dates are the only date setting on a Goal. Actual Start Date and Actual End Date are completed on the service and shown in the associated Goal.

The sixth field is the **Subprogram(s)** field. When a customer is eligible for multiple programs, then there will be multiple choices to select. When the customer is only eligible for a single program, this field will already be preset. Select the desired subprogram(s).

The seventh field is the **Comments** field. This field is optional.

After completing all the fields on the Goal, the user must **add** at least one objective. The **objective** fields are next.

The first field when adding the objective is to select an objective from the drop-down. There are a set of **objectives** that are pre-associated to the goal you selected. Just select one of the objectives in the list.

The second objective field is **Status**. This is a drop-down to select one of the following values. (Not Started, In Progress, Completed, Discontinued.) Select the desired status for the objective.

The third field when adding an objective is the **Planned End Date** field. This is the only date field on the objective that can be set. The Planned End Date is just the planned month and planned year. Setting the Planned End Date is optional.

The final field when adding the objective is an optional **Comments** field. Add text in the comment field.

There are four (4) buttons at the bottom of the Add Goals and Objectives page.
[+ Add Another Objective], [Save & Add Service], [Save Goal/Objectives], [Cancel]



Select the **[Save Goal/Objectives]** button. The system will save the new Goal and Objective and return to the Plan tab of the Career Plan. The new Goal & Objective will be shown in the Plan Goals & Objectives Grid.

| Type | Name | Status | Start Date | Actions |
|----------|--|-------------|------------|---------|
| Training | Finish a Registered Apprenticeship Program to achieve recognized certification. | Not Started | N/A | |
| Training | Complete all steps to become an apprentice in an appropriate U.S. DOL Registered Apprenticeship program. | Not Started | N/A | |

The **[+Add Another Objective]** button would stay on the new goal and add another objective form to complete.

The **[+Save & Add Service]** button would save the Goal & Objective(s) and open the **add service** page. That Goal and the objectives just added would be already in the filter of the add services page, ready to select a service to associated to the Goal & Objectives.

| Service Level | Service Name | Program-SubProgram | Selected | Actions |
|--------------------------------|---|--|--------------------------|-------------------|
| Training Services | Customized Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Training Services | Entrepreneurial Skills Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Training Services | Occupational Skills Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Training Services | Prerequisite Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Training Services | Skill Upgrading and Retraining | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | WBL - Job Shadowing (Individualized) | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | WBL - Pre-Apprenticeship Program | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | WBL - Transitional Jobs | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Training Services | WIOA Title 1B Funded Adult Education w/Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | Workforce Preparation Skills | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |

Viewing a Goal & Objective

Career planners can view Goals & Objectives on the career plan using the Plan tab. By selecting the All filter or the Goals & Objectives filter in the plan, each Goal will have a corresponding view icon to select to view the Goal & Objectives.

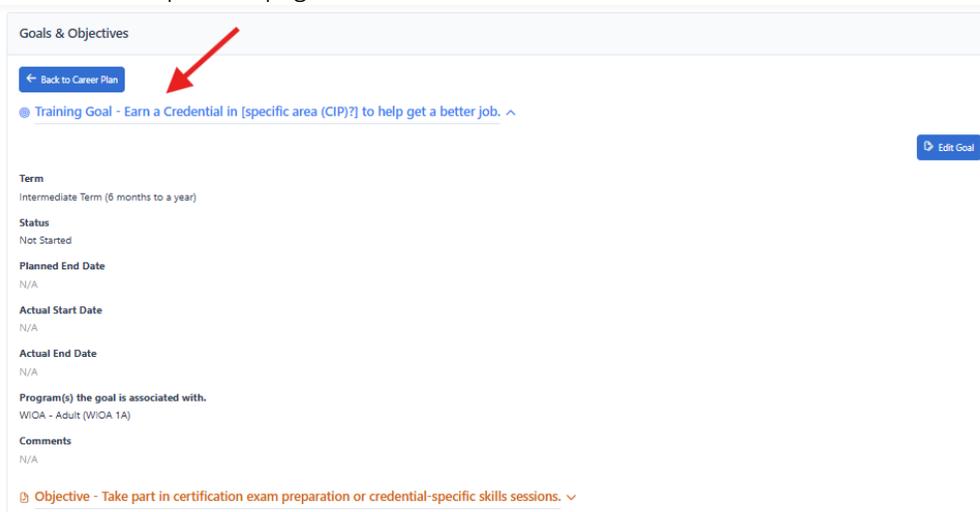
In the **Plan** tab, make sure the view filter is set to Goals & Objectives by selecting the View drop-down and selecting Goals & Objectives.



In each Goal row of the grid there is a view icon in the Actions column.

| Type | Name | Status | Start Date | Actions |
|------------|--|-------------|------------|---------|
| Training | Earn a Credential in [specific area (CIP)?] to help get a better job. | Not Started | N/A | |
| | Take part in certification exam preparation or credential-specific skills sessions. | Not Started | N/A | |
| Employment | Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. | Not Started | 02/25/2026 | |
| | Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. | Not Started | N/A | |
| | Develop skills to work, learn, and communicate in today's digital world. | Not Started | N/A | |

Select a **View icon** on one of the Goal rows. The system will open the **view Goal & Objective(s) page**. The Goal is listed at the top of the page under the Rack to Career Plan button.



The Objective(s) are listed at the bottom of the view page.

Goals & Objectives

[← Back to Career Plan](#)

● Training Goal - Earn a Credential in [specific area (CIP)?] to help get a better job. ^

[Edit Goal](#)

Term
Intermediate Term (6 months to a year)

Status
Not Started

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 - Take part in certification exam preparation or credential-specific skills sessions. v

Select the **[Back to Career Plan]** button.

Goals & Objectives

[← Back to Career Plan](#)

● Training Goal - Earn a Credential in [specific area (CIP)?] to help get a better job. ^

[Edit Goal](#)

The system will route back to the Plan tab of the career plan.

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: ● Goals 📌 Objectives ⚙️ Services

View: Goals & Objectives | Select Goal Type: Select a type... | [+ Add Goal and Objectives](#)

| Type | Name | Status | Start Date | Actions |
|------------|--|-------------|------------|---------|
| Training | ● Earn a Credential in [specific area (CIP)?] to help get a better job. | Not Started | N/A | ⊙ |
| | 📌 Take part in certification exam preparation or credential-specific skills sessions. | Not Started | N/A | |
| Employment | ● Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. | Not Started | 02/25/2026 | ⊙ |
| | 📌 Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. | Not Started | N/A | |
| | 📌 Develop skills to work, learn, and communicate in today's digital world. | Not Started | N/A | |

Editing Goals & Objectives

Career planners can edit Goals & Objectives on the career plan using the Plan tab. By selecting the All filter or the Goals & Objectives filter in the plan, each Goal will have a corresponding view icon to select to view the Goal & Objectives. From the View page, an Edit button will provide a way to edit the Goal & Objectives.

In the **Plan** tab, make sure the view filter is set to **Goals & Objectives** by selecting the View drop-down and selecting Goals & Objectives.



In each Goal row of the grid there is a view icon in the Actions column.

| Type ↑ | Name ↓ | Status ↓ | Start Date ↓ | Actions |
|------------|--|-------------|--------------|---------|
| > Training | Finish a Registered Apprenticeship Program to achieve recognized certification. | Not Started | N/A | 👁️ |
| ▼ Training | Earn a Credential in [specific area (CIP)?] to help get a better job. | In Progress | N/A | 👁️ |
| | Take part in certification exam preparation or credential-specific skills sessions. | In Progress | N/A | |
| ▼ Training | Finish a training program to learn job skills in [occupation (ONET)]. | Not Started | N/A | 👁️ |
| | Complete Financial Aid applications and other necessary college paperwork to ensure program accessibility. | Not Started | N/A | |

Select a **View** icon on one of the Goal rows. The system will open the **view page** of the **Goal & Objective(s)**.

Goals & Objectives

[← Back to Career Plan](#)

⊙ [Training Goal - Finish a Registered Apprenticeship Program to achieve recognized certification.](#) ^

[▶ Edit Goal](#)

Term
Short Term (Less than 6 months)

Status
Not Started

Planned End Date
02/2026

Actual Start Date
N/A

Actual End Date
N/A

Program(s) the goal is associated with.
WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Youth (WIOA 1Y), WIOA - Adult (WIOA 1A), WIOA - Adult (WIOA 1A)

Comments
N/A

📄 [Objective - Complete all steps to become an apprentice in an appropriate U.S. DOL Registered Apprenticeship program.](#) v

📄 [Objective - Take part in and complete related training instruction \(RTI\).](#) v

📄 [Objective - Visit employers, go to career fairs, and attend events to find apprenticeship sponsors.](#) v

📄 [Objective - Finish on-the-job training, lab work, or other learning needed for the apprenticeship.](#) v

At the top right of the view page is the **[Edit]** button. Select the **[Edit]** button.

Goals & Objectives

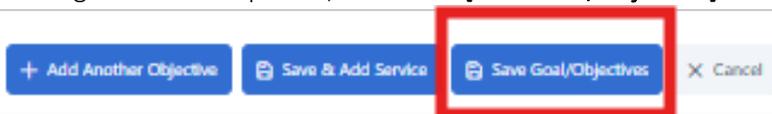
[← Back to Career Plan](#)

⊙ [Training Goal - Finish a Registered Apprenticeship Program to achieve recognized certification.](#) ^

[▶ Edit Goal](#)

The system will open the **Goal & Objectives** in **edit** mode. The user can then change the values throughout the Goal and Objectives as desired.

At the bottom of the Goal & Objectives page are the same four (4) buttons found on the Add Goal & Objectives page. After making the desired updates, Select the **[Save Goal/Objective]** button.



The **Goal & Objective updates** will be **saved**, and the system will route back to the **Plan** tab of the Career plan.

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: Goals Objectives Services

View: Select a Goal or Objective

Goals & Objectives Select a Goal or Objective... + Add Goal and Objectives

| Type | Name | Status | Start Date | Actions |
|----------|--|-------------|------------|---------|
| Training | Finish a Registered Apprenticeship Program to achieve recognized certification. | Not Started | N/A | |
| | Complete all steps to become an apprentice in an appropriate U.S. DOL Registered Apprenticeship program. | Not Started | N/A | |
| | Take part in and complete related training instruction (RTI). | Not Started | N/A | |
| | Visit employers, go to career fairs, and attend events to find apprenticeship sponsors. | Not Started | N/A | |
| | Finish on-the-job training, lab work, or other learning needed for the apprenticeship. | Not Started | N/A | |

Career Plan List View (Services)

When the career plan view filter is set to **Services**, only **Services** show in the grid, Goals & Objectives are hidden. This gives the career planner the ability to only focus on the assigned services.

Under the icon key, is the switch **View** filter. This filters the list to (All, Goals & Objectives, and Services). Select **Services** from the dropdown.

Manage Goals, Objectives & Services

Key: Goals Objectives Services

The screenshot shows the 'Manage Goals, Objectives & Services' interface. The 'View' dropdown is set to 'Services'. The 'Select a Goal or Objective' dropdown is empty. The table below shows one service: 'Workforce Preparation Skills' with a status of 'Planned/Not Started' and start/end dates of 'N/A (Planned)'. The 'Show Unassigned Services Only' checkbox is unchecked. The '+ Add Service' button is visible. The footer shows '1 Service' and pagination controls.

| EE | Name | Status | Start Date | End Date | Actions |
|----|------------------------------|---------------------|---------------|---------------|---------|
| | Workforce Preparation Skills | Planned/Not Started | N/A (Planned) | N/A (Planned) | |

To the right of the View filter is a Select a **Goal or Objective** dropdown. When the user selects a **Goal** in the dropdown, the list will filter the **Services** to all services that are associated to the goal selected.

The screenshot shows the 'Manage Goals, Objectives & Services' interface. The 'View' dropdown is set to 'Services'. The 'Select a Goal or Objective' dropdown is populated with the text 'Build the skills you need to get and keep a job, like good communication, lead...'. The table below shows one service: 'Workforce Preparation Skills' with a status of 'Planned/Not Started' and start/end dates of 'N/A (Planned)'. The 'Show Unassigned Services Only' checkbox is unchecked. The '+ Add Service' button is visible. The footer shows '1 Service' and pagination controls.

| EE | Name | Status | Start Date | End Date | Actions |
|----|------------------------------|---------------------|---------------|---------------|---------|
| | Workforce Preparation Skills | Planned/Not Started | N/A (Planned) | N/A (Planned) | |

To the right of the **Goal or Objective** dropdown is the **checkbox** for the **Show Unassigned Services Only**.

The screenshot shows the 'Manage Goals, Objectives & Services' interface. The 'View' dropdown is set to 'Services'. The 'Select a Goal or Objective' dropdown is empty. The 'Show Unassigned Services Only' checkbox is highlighted with a red box. The '+ Add Service' button is visible. The footer shows '1 Service' and pagination controls.

To the right of the **checkbox** is the **[+ Add Service]** button. This appears when the list is filtered to Services

The screenshot shows the 'Manage Goals, Objectives & Services' interface. The 'View' dropdown is set to 'Services'. The 'Select a Goal or Objective' dropdown is empty. The 'Show Unassigned Services Only' checkbox is unchecked. The '+ Add Service' button is highlighted with a red box. The footer shows '1 Service' and pagination controls.

To the right of the **[+ Add Service]** button is the column selector **hamburger icon**. The column selector hamburger icon

provides the user with a way to add or remove columns from the grid.

The screenshot shows a user profile page for 'John Doe'. It includes sections for 'Customer Profile', 'Application Summary', and 'Manage Goals, Objectives & Services'. A red box highlights the 'Additional Columns' menu on the right, which contains the following options:

- EE
- Name
- Status
- Start Date
- End Date
- Actual Start Date
- Actual End Date
- Program

Another red box highlights the 'View' dropdown menu in the 'Manage Goals, Objectives & Services' section, which is currently set to 'Services'.

Under the **filters and buttons row** is the grid list for **Service(s)**.

The first column is labeled **EE**. The EE column shows which services extend eligibility when added. There's an info bubble icon to the right of the **EE header**. When the user hovers the mouse over the **info icon**, a full description of the meaning of EE will appear in an info bubble.

| EE ⓘ | Name | ↑↓ | Status | ↑ | Start Date | ↑↓ | End Date | ↑↓ | Actions |
|------|------|----|--------|---|------------|----|----------|----|---------|
|------|------|----|--------|---|------------|----|----------|----|---------|

The second column is **Name**. Each row has a **service name**. To the right of the **Name label** in the column header is a **sort icon**. This icon sorts the list by service name alphabetically toggling between ascending and descending order.

| EE ⓘ | Name | ↑↓ | Status | ↑ | Start Date | ↑↓ | End Date | ↑↓ | Actions |
|------|------|----|--------|---|------------|----|----------|----|---------|
|------|------|----|--------|---|------------|----|----------|----|---------|

The third column is the **Status** column. **Statuses** will show on every row. In the column header to the right of the **Status label**, is a **sort icon**. This icon sorts the list by service status toggling between ascending and descending order.

| EE ⓘ | Name | ↑↓ | Status | ↑ | Start Date | ↑↓ | End Date | ↑↓ | Actions |
|------|------|----|--------|---|------------|----|----------|----|---------|
|------|------|----|--------|---|------------|----|----------|----|---------|

The fourth column is the **Start Date**. To the right of the **Start Date label**, is a **sort icon**. This icon sorts the list by the Service Start Date between ascending and descending order.

| EE ⓘ | Name | ↑↓ | Status | ↑ | Start Date | ↑↓ | End Date | ↑↓ | Actions |
|------|------|----|--------|---|------------|----|----------|----|---------|
|------|------|----|--------|---|------------|----|----------|----|---------|

The fifth column is the **End Date**. To the right of the **End Date label**, is the sort icon. This icon sorts the list by the Service Start Date toggling between ascending and descending order.

| EE ⓘ | Name | ↑↓ | Status | ↑ | Start Date | ↑↓ | End Date | ↑↓ | Actions |
|------|------|----|--------|---|------------|----|----------|----|---------|
|------|------|----|--------|---|------------|----|----------|----|---------|

The sixth column is **Actions**. The **Actions** column has a **view icon** for each Service Row. When selected, it takes the user to the view details page.

| EE ⓘ | Name | ↑↓ | Status | ↑ | Start Date | ↑↓ | End Date | ↑↓ | Actions |
|------|------|----|--------|---|------------|----|----------|----|---------|
|------|------|----|--------|---|------------|----|----------|----|---------|

At the bottom of the grid is a **Pagination** control.

| | | | | | | | | | |
|-------------|-------------|----|---|---|---|----|---|----|---|
| 10 Services | Page 1 of 1 | << | < | 1 | > | >> | 1 | 10 | ▼ |
|-------------|-------------|----|---|---|---|----|---|----|---|

Adding a Service

Career planners can **add Services** to the career plan using the **Plan** tab. When services are added to the plan, they must be associated with a Goal & Objective. A Goal & Objective can be associated with multiple services. This feature set covers adding a service to a plan and associating it with a Goal & Objective.

In the **Plan** tab, make sure the view filter is set to **Services** by selecting the drop-down and selecting **Services**. Select the **[+ Add Service]** button. The system routes to the **Add Services** page.

What Area Do you Want to Work In?
Career Plan

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: Goals Objectives Services

View: Services Select a Goal or Objective
Select a Goal or Objective... Show Unassigned Services Only **+ Add Service**

The system routes to the **Add Services** page (*below*):

The top **title bar** displays: Add Services-Customer Name - Programs enrolled in.

Below the title bar is a **[Back to Career Plan]** button. This button routes back to the Plan tab.

Add Services - John Doe - Adult (WIOA 1A)

← Back to Career Plan

Keyword Search
Enter Keyword... Reset

Goal: Select Goal... Objective: Select Objective...

Advanced Search

Filtered Services

| Service Level | T1 | Service Name | Program-SubProgram | Selected | Actions |
|--------------------------------|----|-----------------------------|--|--------------------------|---------|
| Individualized Career Services | | English Language Education | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | | Financial Literacy Services | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |

Under the **[Back to Career]** Plan button is the **Keyword Search** text field. By entering a word or phrase into the field, it will automatically filter the services that contain that Keyword or phrase. Enter a word or phrase into the Keyword Search field.

The **[Reset]** button will clear out the **Keyword Search** filter and reload the list unfiltered. Select the **[Reset]** button.

Add Services - Piper Gordon - Adult (WIOA 1A), Dislocated Worker (WIOA 1D), Youth (WIOA 1Y)

← Back to Career Plan

Keyword Search
WBL

Reset

Goal: Select Goal...
Objective: Select Objective...

Advanced Search

Filtered Services

| Service Level | Service Name | Program-SubProgram | Selected | Actions |
|--------------------------------|--|--|--------------------------|-------------------|
| Career Services | WBL - Job Shadowing | WIOA - Youth (WIOA 1Y) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | WBL - Job Shadowing (Individualized) | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Career Services | WBL - OJT - Private Sector (Youth) | WIOA - Youth (WIOA 1Y) | <input type="checkbox"/> | ⓘ |
| Career Services | WBL - Paid WEX/Internship (Not Limited to Summer Months) | WIOA - Youth (WIOA 1Y) | <input type="checkbox"/> | ⓘ |
| Career Services | WBL - Paid WEX/Internship (Youth Limited to Summer Months) | WIOA - Youth (WIOA 1Y) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | WBL - Pre-Apprenticeship Program | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Career Services | WBL - Pre-Apprenticeship Program | WIOA - Youth (WIOA 1Y) | <input type="checkbox"/> | ⓘ |
| Individualized Career Services | WBL - Transitional Jobs | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |
| Career Services | WBL - Unpaid WEX/Internship (Not limited to Summer Months) | WIOA - Youth (WIOA 1Y) | <input type="checkbox"/> | ⓘ |
| Career Services | WBL - Unpaid WEX/Internship (Youth Limited to Summer Months) | WIOA - Youth (WIOA 1Y) | <input type="checkbox"/> | ⓘ |

15 Services Page 1 of 2 << < 1 2 > >> 1 10

Save Cancel

The **Goal** dropdown selection field contains *all the goals* that are on the Plan. Select a **goal**, it will filter all the services that are *associated* and *support* that goal.

Add Services - Piper Gordon - Adult (WIOA 1A), Dislocated Worker (WIOA 1D), Youth (WIOA 1Y)

← Back to Career Plan

Keyword Search
WBL

Reset

Goal: Select Goal...
Objective: Select Objective...

Build basic reading and math skills through Adult Basic Education (ABE) for job and life success. (Referral Based Goal)

Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money.

Earn a Credential in [specific area (CIP)?] to help get a better job.

Finish a Registered Apprenticeship Program to achieve recognized certification.

| Service Level | Service Name | Program-SubProgram | Selected | Actions |
|--------------------------------|--------------------------------------|--|--------------------------|-------------------|
| Individualized Career Services | WBL - Job Shadowing (individualized) | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | ⓘ |

The **Objective** dropdown selection field will show all the Objectives that are *associated* to the *Goal selected*. Set the objective, it will filter the Services that are associated with that Objective.

Add Services - Piper Gordon - Adult (WIOA 1A), Dislocated Worker (WIOA 1D), Youth (WIOA 1Y)

[← Back to Career Plan](#)

Keyword Search
WBL Reset

Goal
Build basic reading and math skills through Adult Basic Education (ABE) for job and life success. (Referral Based Goal) × ▼

Objective
Select Objective...

Sign up for reading and math classes that match your career and life goals.

▼ Advanced Search

Select the **Advance Search** button, it will expand and provide more search fields for filtering services.

^ Advanced Search

Program
Select Subprogram(s)...

Service Level
Select Service Level...

Service Type
Select Service Type...

If the customer is eligible for multiple Programs, use the **Program** dropdown selection field to select a program. The services can be filtered by a specific program. Multiple programs can be selected.

^ Advanced Search

Program
(2 items selected)

WIOA
 Adult (WIOA 1A)
 Dislocated Worker (WIOA 1D)
 Youth (WIOA 1Y)

Select a **Service Level** from the Service Level selection dropdown, the services will filter for that service level.

If the user selects the **Service Type** from the Service Type selection dropdown, the services will filter for that service type.

Select the **[Advance Search]** button again, it collapses the Advance Search Area

Once the user has filtered the **Services** then the service to add to the plan should be in the **Filtered Services** grid.

Filtered Services

| Service Level | Service Name | Program-SubProgram | Selected | Actions |
|--|---|--|--------------------------|-------------------|
| Individualized Career Services | English Language Education | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | i |
| Individualized Career Services | Financial Literacy Services | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | i |
| Basic Career Services (Staff Assisted) | Job Search Activities and Assistance (STAFF ASSISTED) | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | i |
| Training Services | OJT - Private Sector | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | i |

The **Filtered Services** grid has the following Labels (refer to the below for descriptions)

Filtered Services

| Service Level | Service Name | Program-SubProgram | Selected | Actions |
|-------------------|---------------------|--|--------------------------|---------|
| Training Services | Customized Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | |

The first column in the grid is the **Service Level**. It can be sorted in ascending or descending alphabetical order.
 The second column in the grid is the **Service Name**. It can be sorted in ascending or descending alphabetical order.
 The third column in the grid is the **Program-Sub Program**.
 The fourth column in the grid is **Selected** with a check box. When the check box is **checked**, then the **edit icon** becomes visible.
 The fifth column is **Actions**. It has an **info bubble icon** that describes each Service.

Select a **checkbox**. Then select the **edit icon**.

| Service Level | Service Name | Program-SubProgram | Selected | Actions |
|-------------------|---------------------------------|--|-------------------------------------|---------|
| Training Services | Customized Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input checked="" type="checkbox"/> | |
| Training Services | Entrepreneurial Skills Training | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input type="checkbox"/> | |

The system will open the **Service Template** corresponding to the **selected service** and allow the user to set up the service attributes.

Edit Service - English Language Education

Program: WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) Service Level: Individualized Career Services Grant Number: N/A

Goal *

Objective *

Providing Entity *

Completion Status *

Start Date *

End Date

Comments

Fill in the service attributes in the template and select the **[Save]** button.

Edit Service - English Language Education

Program: WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) Service Level: Individualized Career Services Grant Number: N/A

Goal *
 Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. ✕ ▼

Objective *
 Develop skills to work, learn, and communicate in today's digital world. ✕ ▼

Providing Entity *
 160 DRIVING ACADEMY - 160 Driving Academy ✕ ▼

Completion Status *
 Planned Not Started ✕ ▼

Start Date

End Date

Comments
 Enter Comments here.

Save ✕ Cancel 🗑 Delete

The system will **save** the service and attributes and route back to the **Add Services** page.

Filtered Services

| Service Level | Service Name | Program-SubProgram | Selected | Actions |
|--------------------------------|----------------------------|--|-------------------------------------|-------------------------------------|
| Individualized Career Services | English Language Education | WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) | <input checked="" type="checkbox"/> | ✎ 🔍 |

Select the **[Save]** button on the add services page. The system will route back to the **Plan tab** of the Career Plan.

Individualized Career Services WBL - Transitional Jobs WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D) [🔍](#)

53 Services Page 1 of 6 << < 1 2 3 4 5 > >> 1 10 ▼

Save ✕ Cancel

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: 🔵 Goals 🔴 Objectives ⚙ Services

View: Services Show Unassigned Services Only + Add Service

| EE | Name | Status | Start Date | End Date | Actions |
|--------------------------|------------------------------|---------------------|---------------|---------------|-------------------|
| <input type="checkbox"/> | Workforce Preparation Skills | Planned/Not Started | N/A (Planned) | N/A (Planned) | 🔍 |
| <input type="checkbox"/> | English Language Education | Planned/Not Started | N/A (Planned) | N/A (Planned) | 🔍 |

2 Services Page 1 of 1 << < 1 > >> 1 10 ▼

Viewing a Service

Career planners can **view services** on the career plan using the Plan tab. By selecting the All filter or the Services filter in the plan, services will show in rows on the plan.

In the **Plan** tab, make sure the view filter is set to **Services** by selecting the drop-down and selecting Services.

The screenshot shows the 'Plan' tab selected in a navigation bar. Below it, there's a section titled 'Manage Goals, Objectives & Services'. A key indicates that 'Goals' are represented by a blue circle, 'Objectives' by an orange square, and 'Services' by a grey square. A 'View' dropdown menu is highlighted with a red box, showing 'Services' selected. To the right of the dropdown is a search box labeled 'Select a Goal or Objective...' and a 'Show Unassigned Services Only' checkbox. There is also an '+ Add Service' button and a menu icon.

On each service row, in the **Actions** column is a view icon. Select one of the view icons.

| EE ⓘ | Name | ⇅ | Status | ↑ | Start Date | ⇅ | End Date | ⇅ | Actions |
|--------------------------|------------------------------|---|---------------------|---|---------------|---|---------------|---|---------|
| <input type="checkbox"/> | Workforce Preparation Skills | | Planned/Not Started | | N/A (Planned) | | N/A (Planned) | | |
| <input type="checkbox"/> | English Language Education | | Planned/Not Started | | N/A (Planned) | | N/A (Planned) | | |

2 Services Page 1 of 1 << < 1 > >> 1 10 ▾

Selecting the view icon will open the **View Page** for that service.

The screenshot shows the 'View Page' for 'Workforce Preparation Skills'. At the top, there's a 'Back to Career Plan' button. Below that, program details are listed: Program (WIDA - Adult (WIDA 1A), WIDA - Dislocated Worker (WIDA 1D), WIDA - Adult (WIDA 1A), WIDA - Dislocated Worker (WIDA 1D)), Service Level (Individualized Career Services), and Grant Number (N/A). An 'Edit' button is visible. The main content area includes:

- Goal:** Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money.
- Objective:** Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others.
- Providing Entity:** AFFORDABLE HOME SYSTEMS, INC - Affordable Home Systems, Inc
- Completion Status:** Planned Not Started
- Start Date:** N/A
- End Date:** N/A
- Comments:** N/A

 At the bottom, there's a 'Service Files' section with an '+ Add File' button. A table header is shown with columns: Subject, Name ↑, Type, Stored At ↑, Accessed At ↑, Last Accessed By ↑, and Action. Below the header, it says 'No Files have been Uploaded for Workforce Preparation Skills.' and '0 Files Page 0 of 0 << < > >> 0 10 ▾'.

Select the **[Back to Career Plan]** button.

Workforce Preparation Skills

← Back to Career Plan
←

Program:
 WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)

Service Level:
 Individualized Career Services

Grant Number:
 N/A

The system will return to the **Plan** tab of the career plan.

Recommendations
Plan
Signatures

Manage Goals, Objectives & Services

Key: ● Goals ▢ Objectives ✦ Services

View: Services Select a Goal or Objective

Select a Goal or Objective... Show Unassigned Services Only + Add Service

| EE | Name | Status | Start Date | End Date | Actions |
|--------------------------|------------------------------|---------------------|---------------|---------------|--|
| <input type="checkbox"/> | Workforce Preparation Skills | Planned/Not Started | N/A (Planned) | N/A (Planned) | 🔍 |
| <input type="checkbox"/> | English Language Education | Planned/Not Started | N/A (Planned) | N/A (Planned) | 🔍 |

2 Services Page 1 of 1 << < 1 > >> 1 10

Editing a Service

Career planners can **edit services** on the career plan using the **Plan** tab. By selecting the All filter or the Services filter in the plan, services will show in rows on the plan. The user can then view and edit the service.

In the **Plan** tab, make sure the view filter is set to **All** by selecting the drop-down and selecting **Services**.

View

All

Select a Goal or Objective

Select a Goal or Objective...

+ Add Goal and Objectives

+ Add Service

☰

| Type | Name | Status | Start Date | Actions |
|--------------|---|---------------------|------------|--|
| ▼ Employment | 🎯 Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. | Not Started | N/A | 🔍 |
| | ▢ Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. | Not Started | N/A | |
| | ▢ Develop skills to work, learn, and communicate in today's digital world. | Not Started | N/A | |
| | ✦ Workforce Preparation Skills | Planned/Not Started | N/A | 🔍 |
| | ✦ English Language Education | Planned/Not Started | N/A | 🔍 |

On each service row, in the **Actions** column is a view icon. Select one of the **view icons**.

| Type ↑↓ | Name ↑↓ | Status ↑↓ | Start Date ↑↓ | Actions |
|------------|--|---------------------|---------------|---------|
| Employment | Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. | Not Started | N/A | |
| | Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. | Not Started | N/A | |
| | Develop skills to work, learn, and communicate in today's digital world. | Not Started | N/A | |
| | Workforce Preparation Skills | Planned/Not Started | N/A | |

Selecting the **view icon** will open the **view page** for that **service**.

Workforce Preparation Skills

[← Back to Career Plan](#)

Program: WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)
 Service Level: Individualized Career Services
 Grant Number: N/A

[▶ Edit](#)

Goal
 Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money.

Objective
 Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others.

Providing Entity
 AFFORDABLE HOME SYSTEMS, INC - Affordable Home Systems, Inc

Completion Status
 Planned Not Started

Start Date
 N/A

End Date
 N/A

Comments
 N/A

Service Files [+ Add File](#)

| Subject | Name ↑↓ | Type | Stored At ↑↓ | Accessed At ↑↓ | Last Accessed By ↑↓ | Action |
|---|---------|------|--------------|----------------|---------------------|--------|
| No Files have been Uploaded for Workforce Preparation Skills. | | | | | | |
| 0 Files Page 0 of 0 << < > >> 0 10 | | | | | | |

At the top right of the view page is the **[Edit]** button. Select the **[Edit]** button.

Workforce Preparation Skills

[← Back to Career Plan](#)

Program: WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)
 Service Level: Individualized Career Services
 Grant Number: N/A

[▶ Edit](#)

Goal

The system will display the appropriate **service template** where **edits** can be made.

Edit Episode - Workforce Preparation Skills

Program:
 WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)

Service Level:
 Individualized Career Services

Grant Number:
 N/A

Goal *
 Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. X v

Objective *
 Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. X v

Providing Entity *
 AFFORDABLE HOME SYSTEMS, INC - Affordable Home Systems, Inc X v

Completion Status *
 Planned Not Started X v

Start Date

End Date

Comments

Save Cancel Delete

Make edits to the service and select the **Save** button.

Edit Episode - Workforce Preparation Skills

Program:
 WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)

Service Level:
 Individualized Career Services

Grant Number:
 N/A

Goal *
 Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money. X v

Objective *
 Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others. X v

Providing Entity *
 AFFORDABLE HOME SYSTEMS, INC - Affordable Home Systems, Inc X v

Completion Status *
 Open X v

Start Date *
 02/25/2026

End Date

Comments
 Enter Comments here.

Save Cancel Delete

The system will route back to the **View service page**.

Workforce Preparation Skills

[← Back to Career Plan](#)

Program:
 WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)

Service Level:
 Individualized Career Services

Grant Number:
 N/A

[Edit](#)

Goal
 Build the skills you need to get and keep a job, like good communication, leadership skills, using computers, and managing your money.

Objective
 Build your leadership skills by taking part in hands-on workshops where you'll practice speaking clearly, solving problems, and working with others.

Providing Entity
 AFFORDABLE HOME SYSTEMS, INC - Affordable Home Systems, Inc

Completion Status
 Open

Start Date
 02/25/2026

End Date
 N/A

Comments
 Enter Comments here.

Service Files [+ Add File](#)

| Subject | Name | Type | Stored At | Accessed At | Last Accessed By | Action |
|---|------|------|-----------|-------------|------------------|--------|
| No Files have been Uploaded for Workforce Preparation Skills. | | | | | | |
| 0 Files | | | | | | |

Page 0 of 0

Select the **[Back to Career Plan]** button.

Workforce Preparation Skills

[← Back to Career Plan](#)

Program:
 WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D), WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)

Service Level:
 Individualized Career Services

Grant Number:
 N/A

The system will return to the **Plan tab** of the career plan.

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: Goals Objectives Services

View: Show Unassigned Services Only [+ Add Service](#)

| EE | Name | TI | Status | TI | Start Date | TI | End Date | TI | Actions |
|--------------------------|------------------------------|----|---------------------|----|---------------------|----|---------------|----|---------|
| <input type="checkbox"/> | Workforce Preparation Skills | | Open | | 02/25/2026 (Actual) | | N/A (Planned) | | |
| <input type="checkbox"/> | English Language Education | | Planned/Not Started | | N/A (Planned) | | N/A (Planned) | | |

2 Services

Page 1 of 1