



Accessing the Prescreening – Career Planner

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

This document is intended to explain how to access a customer profile to begin a prescreen in IWDS 2.0.

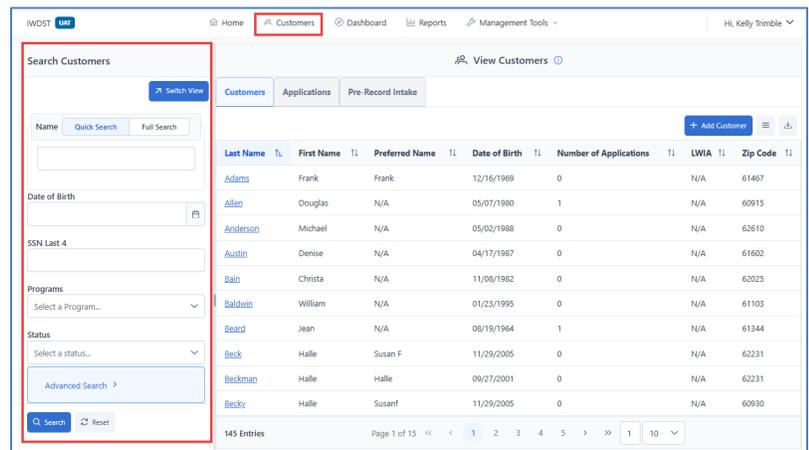
Audience

This document is designed to guide both trainers and end users through the process of accessing the prescreen as a career planner or intake staff member in the IWDS 2.0 System.



Navigate to Customers

- Log into IWDST 2.0. ([Link](#))
- Select **Customers**.
- The View Customers Page is displayed.
- The **Search Filter** on the left shows a Quick Search and Full Search option. Select Advanced Search for additional fields.



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View Customer Search Results

- Select your customer by clicking on the hyperlink for the customer's last name.

| Last Name | First Name | Preferred Name | Date of Birth | Number of Applications | LWIA | Zip Code |
|-----------------------|------------|----------------|---------------|------------------------|------|----------|
| Brown | Connor | N/A | 02/26/2001 | 0 | N/A | 61467 |
| Brown | Kelly | N/A | 01/15/1982 | 0 | N/A | 60073 |
| Brown | Connor | N/A | 02/09/1988 | 0 | N/A | 60505 |



View Customer Profile and Begin Prescreen

- The customer profile will display.
- Navigate to the Prescreen section and select **Start Intake Process**.
- A modal will display to determine how to move forward with Prescreen. Select The appropriate option for the customer and select **Confirm**.

Customer Profile: Frank T Adams

| | | |
|------------------------------|---|---------------------------------------|
| First Name Frank | Middle Initial T | Last Name Adams |
| Preferred Name Frank | Primary Phone Number (309) 375-6259 | Address ONEIDA, 61467 |
| Pronouns N/A | Primary Phone Receives Text Messages N/A | Email fadams@fakemail.com |
| Date of Birth 12/16/1969 | Secondary Phone Number N/A | Preferred Communication Method N/A |
| Age 56 years, 30 days old | Secondary Phone Receives Text Messages N/A | LWIA N/A |
| IwN ID 37540 | IwN Username FAdams1 | |

Intake Summary

Prescreenings

+ Start Intake Process

| Completion Type | Status | Expires On | Actions |
|-------------------------|--------|------------|---------|
| No Prescreenings Found! | | | |

- Complete with Customer Now will launch the prescreening for the user to complete with the customer.
- Send the customer a link to complete it on their own will send an email to the customer with a link to complete the prescreening.

Start the Application Process

To begin the Application process the customer will need to complete a prescreening.

How would you like to proceed with completing the prescreening for this customer?

Send the customer a link to complete it on their own.

Complete with the customer now.

Confirm Cancel

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- **Note** – If a Customer has an existing Prescreen, the Career Planner cannot initiate a new one. The Career Planner can either delete the existing entry or update the existing prescreen record
- If a Customer has an expired prescreen record, then the Career Planner can add a new prescreen record by selecting **Start Intake Process**

| Completion Type | Status | Expires On | Actions |
|-----------------|--------------------------------|----------------------|--------------------------------------|
| Career Planner | In Progress (Prescreen Intake) | 02/14/2026 (29 days) | Start Intake Process |

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