



Add & Edit Goals & Steps on Career Plan

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

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

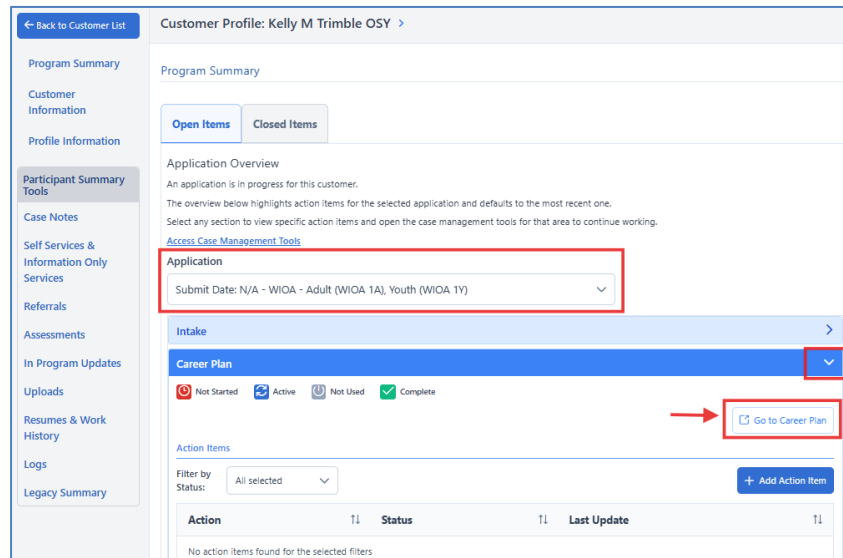
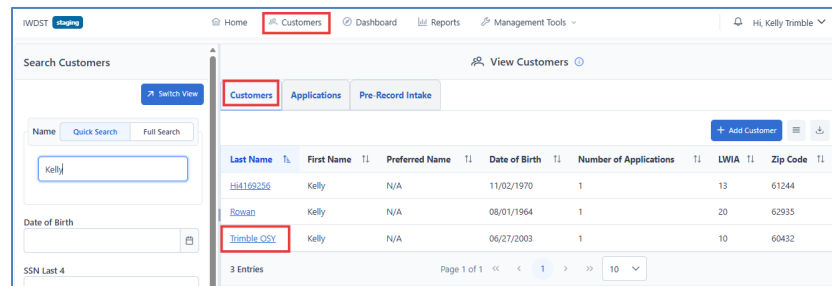
Audience

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



Navigate to Customer Career Plan

- Log into IWDS 2.0. ([Link](#))
- Select the Customers Tab.
- 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.
- The Program Summary and Application Summary will appear. Expand the Career Plan tab and select **Go to Career Plan**.
- The Career Plan is divided



IWDS 2.0 Site



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IWDS 2.0 TECHNICAL TRAINING DOCUMENTS

into 3 tabs – Select the **Plan** tab or **Plan quick link**.

- **Note** – you can also utilize the quick links on the left to access the Career Plan

Customer Profile: Kelly M Trimble OSY

Preferred Name: Kelly | Preferred Communication Method: Email | Primary Phone Number: (999) 999-5555 | Email: ktrimble3@fakemail.com

Program(s): WIOA - Adult, WIOA - Youth | Application Status: Applicant | Application Date: N/A | Est. Exit Date: N/A

What Area Do you Want to Work In? Career Plan

Recommendations | **Plan** | Signatures

Manage Goals, Steps & Services

Key: Goals | Steps | Services

View: All | Select a Goal or Step... | + Add Goal and Steps | + Add Service

Type	Name	Status	Actions
Follow-Up	Keep a steady job in [specific field/occupation] and/or stay enrolled in college or training, while meet regularly with a career planner to get support for success in work or school and plan for the future.	Not Started	
	Talk with your career planner every month for a year to help with your job and future career.	Not Started	

Recommendations | **Plan** | Signatures

Manage Goals, Steps & Services

Key: Goals | Steps | Services

View: Goals & Steps | Select a Goal Type: Select a type... | + Add Goal and Steps

Type	Name	Status	Actions
Follow-Up	Keep a steady job in [specific field/occupation] and/or stay enrolled in college or training, while meet regularly with a career planner to get support for success in work or school and plan for the future.	Not Started	
	Talk with your career planner every month for a year to help with your job and future career.	Not Started	



View Goals and Steps

- The Career Plan consists of Goals, Steps 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**.
- **Note** – use the **Select a Goal or Step** drop down to

Recommendations | **Plan** | Signatures

Manage Goals, Steps & Services

Key: Goals | Steps | Services

View: All | Select a Goal or Step: Select a Goal or Step... | + Add Goal and Steps | + Add Service

Type	Name	Status	Actions
Follow-Up	Keep a steady job in [specific field/occupation] and/or stay enrolled in college or training, while meet regularly with a career planner to get support for success in work or school and plan for the future.	Not Started	
	Talk with your career planner every month for a year to help with your job and future career.	Not Started	
	Follow-Up Services Youth (Element 9)	Planned/Not Started	

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IWDS 2.0 TECHNICAL TRAINING DOCUMENTS

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 Steps on the Career Plan.
- Selecting the Eye icon allows for editing a goal when needed with the **Edit Goal and Edit Step** Buttons. Use the chevrons to expand the section.
- Editing the Goal or Step will open the screen to make changes or delete a goal or step.



Add Goals & Steps to Career Plan

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

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IWDS 2.0 TECHNICAL TRAINING DOCUMENTS

- **Note** – Goals and Steps must be added before a service can be added
- After selecting Add Goal and Steps, 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 to **Add at least one Step** to the goal. Complete the fields associated with the Step.
- From here the user can **Add Another Step, Save & Add Service, or Save Goal/Steps** 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.](#)

Goals & Steps

← Back to Goal & Steps

● Add Goals ⓘ

What type of goal are you adding?*

+ Add Another Step | Save & Add Service | Save Goal/Steps | X Cancel

Goals & Steps

← Back to Goal & Steps

● Add Goals ⓘ

What type of goal are you adding?*

Education X

Identify the goal by selecting from the preset list or use the 'other' option to add your own.*

Term*

Select a term...

Status*

Select a status...

Note: Only the Planned End Date is editable; all other dates will be automatically calculated based on the services associated with it.

Planned End Date

Month / Year

Start Date

End Date

Comments

+ Add Another Step | Save & Add Service | Save Goal/Steps | X Cancel

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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