



# Add & Edit Services on Career Plan

## IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



### Purpose

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

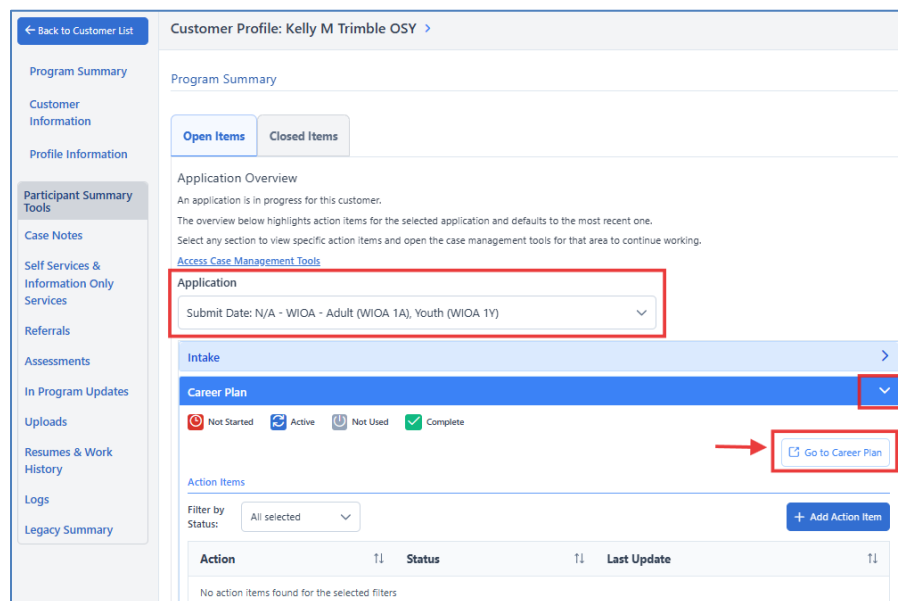
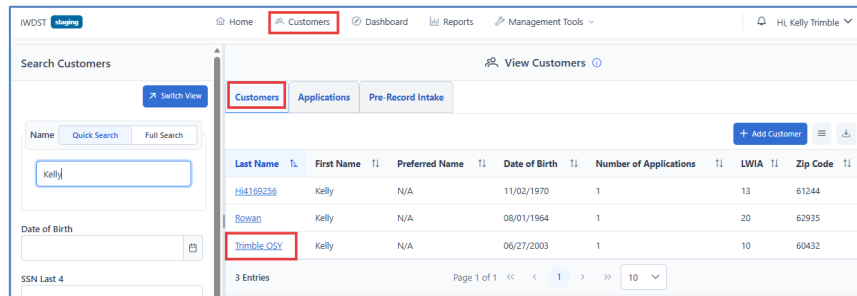
### Audience

This document is designed to guide both trainers and end users through the process of adding and editing services 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 into 3 tabs –



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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  
Select a Goal or Step...

+ Add Goal and Steps + Add Service

Type	Name	Status	Actions
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## View the Career Plan Services

- 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 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 Services on the Career Plan.

Recommendations **Plan** Signatures

Manage Goals, Steps & Services

Key: Goals Steps Services

View: Goals & Steps Select 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	

English Language Education

← Back to Career Plan

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

Goal: N/A

**Edit**

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- Selecting View Services allows for editing a Service when needed with the **Edit** Button.



### Add Services to Career Plan

- To add a service to the Career Plan, Filter the View to Services, then Select **Add Service**

- **Note** – In order to add a service, there must be a Goal & Step associated.

- After selecting Add Service, the Add Services Page will display. Utilize the Keyword Search or Advanced Search as needed. Select

the Goal and Step in the drop down menus to add related services.

- In the Filtered Services table, the related services will display. Click the box in the Selected column to edit a service, using the **Edit** pen.

Recommendations **Plan** Signatures

Manage Goals, Steps & Services

Key: Goals Steps Services

View: Services Select a Goal or Step Select a Goal or Step... **+ Add Service**

EE	Name	Status	Start Date	End Date	Actions
<input checked="" type="checkbox"/>	Job Search Activities and Assistance (STAFF ASSISTED) (1 episodes)	Planned/Not Started			
<input checked="" type="checkbox"/>	Career Information Services (STAFF ASSISTED) (1 episodes)	Planned/Not Started			

Add Services - Kelly Trimble OSY - Adult (WIOA 1A), Youth (WIOA 1Y)

[← Back to Career Plan](#)

Keyword Search: Enter Keyword... [Reset](#)

Goal: Get Ready for or complete an Associate Degree in Computer and Mathematical for career stability and growth.

Step: Look into and get information about job or school training programs that match your career goals and industry needs.

[Advanced Search](#)

Service Level	Service Name	Program-SubProgram	Selected	Actions
Career Services	Post-Secondary Prep & Transition Activities	WIOA - Youth (WIOA 1Y)	<input checked="" type="checkbox"/>	

[Save](#) [Cancel](#)

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- Clicking the Edit pen will display the Edit Service screen for the selected Service. This Service Template displays the required fields to add the service to the Career Plan.

Edit Service - Post-Secondary Prep & Transition Activities

Program: WIOA - Youth (WIOA 1Y) Service Level: Career Services Grant Number: N/A

Goal \*  
Get Ready for or complete an Associate Degree in [career cluster] for career stability and growth. X

Step \*  
Look into and get information about job or school training programs that match your career goals and industry needs. X

Providing Entity \* Supplier  
Select an answer Refer Service

Sub Program \*  
Select an answer

Completion Status \*  
Select an answer

Start Date \*  
mm/dd/yyyy

End Date  
mm/dd/yyyy

Comments

Save Cancel Delete

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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