Training & Education Assessment

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS

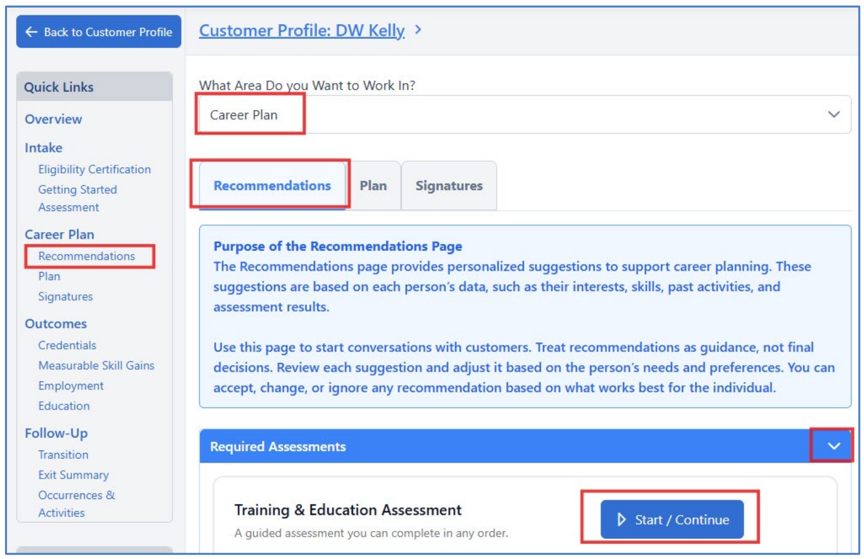
Purpose

The Training & Education Assessment documents a structured conversation with the customer to determine whether training is the right fit, identify a suitable training program, and unlock training services in IWDS 2.0. Complete all tabs in order — each must be finished before advancing to the next.

Audience

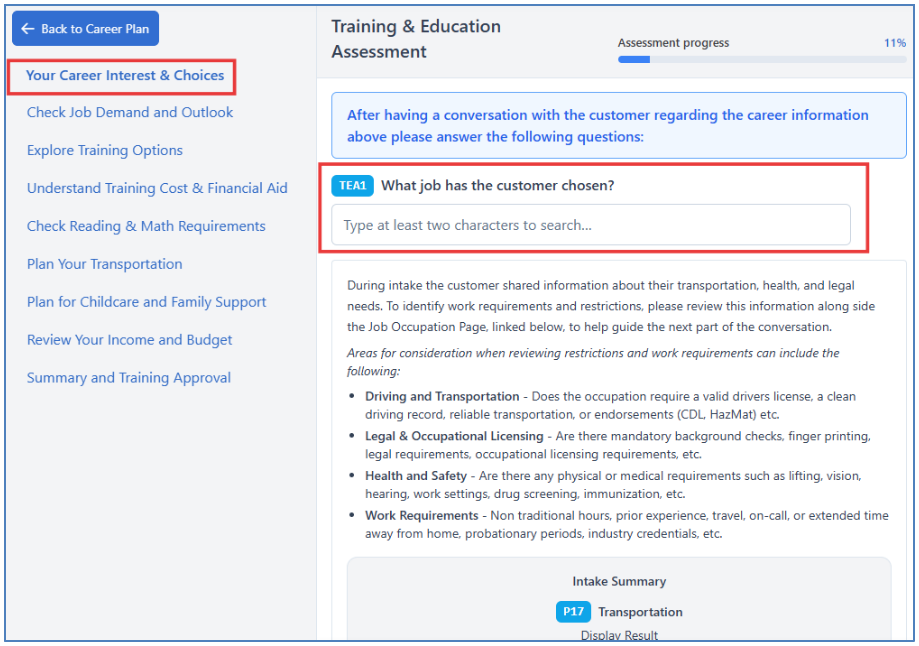
This guide provides step-by-step instructions for completing the Training & Education Assessment in IWDS 2.0.

Accessing the Training & Education Assessment



- Navigate to the Career Plan section of the Customer Application and click the **Recommendations** Tab.
  - Note - A customer's application must be certified before the Training & Education Assessment is available.
- Click Required Assessments to open the panel and select the **Start/Continue** button to open the assessment.
  - Note - The assessment is triggered by specific goals and services selected in the Career Plan.
- The Training & Education Assessment must be completed before a start date can be added to any training service.
- A Work-Based Learning Assessment will also appear, which is a shorter version for customers pursuing work-based learning.

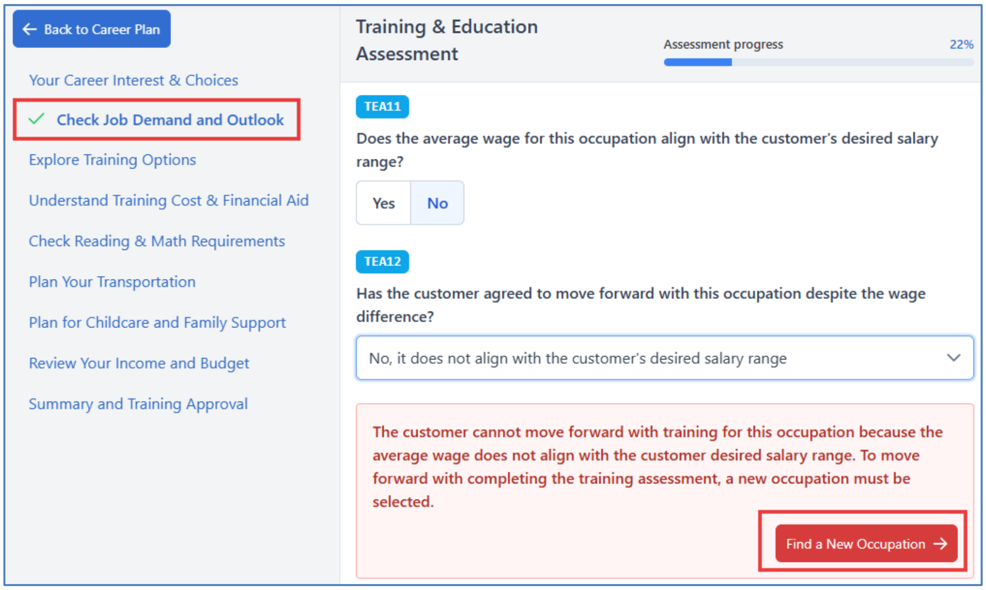
Your Career Interest & Choices



- Review the read-only section at the top. The system has pre-populated career interests, Getting Started Assessment responses, and interest survey results.
- Scroll down past the read-only section to the prompt: "After having a conversation with the customer..."
- Enter the customer's chosen job in the search field. The system will retrieve the O*NET code for that occupation.
    - Note - The career selected here drives demand data, training alignment, and everything on the following tabs, so accuracy matters.
- Review the Restrictions section. It helps you compare the customer's transportation, health, and legal situation against the occupation's requirements.
    - Note - The restrictions section is pre-populated from the Getting Started Assessment (GSA).
- Click the O*NET Occupation Page link to review specific occupation requirements side by side.
- Confirm whether this is still the career direction the customer wants to pursue.
- Complete the questions as asked, then click Next.

Check Job Demand and Outlook

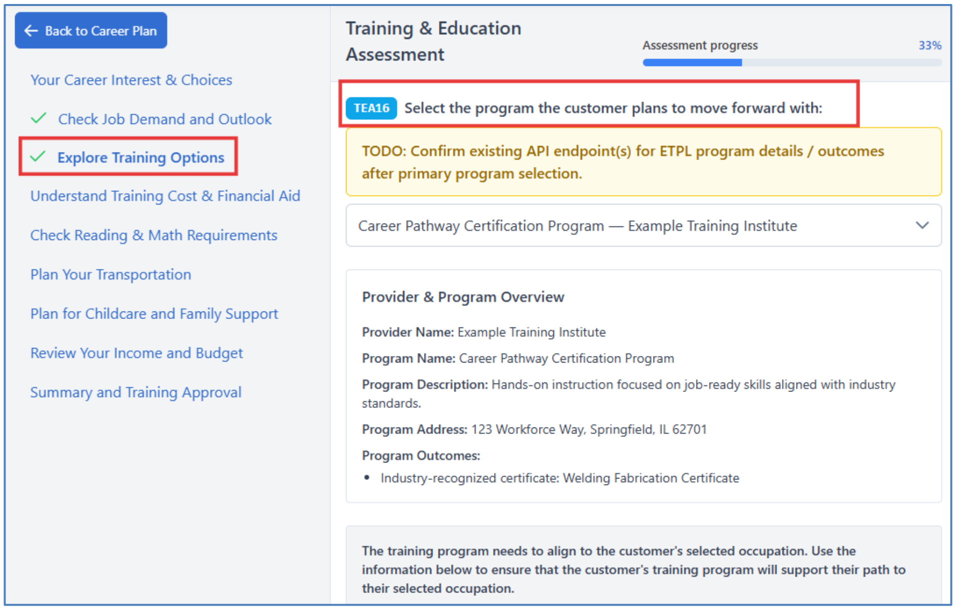
- Review the Demand Occupation indicator at the top: green = high demand, yellow = moderate, red = not on demand list.
- Review the Employment Outlook section — it links to labor market data (wages, trends, job details) to support your conversation.
    - Note that customer preferences from intake (schedule, work type, priorities) are already pre-populated.
- If the customer wants to change direction, use the course correction link (red message) to navigate back and update the occupation.
- Complete the questions on the page, then click Next.



- Red demand warning does not stop you, but does require additional follow-up.
    - Note - The demand indicator is automated and is populated from demand occupation information at the state level.

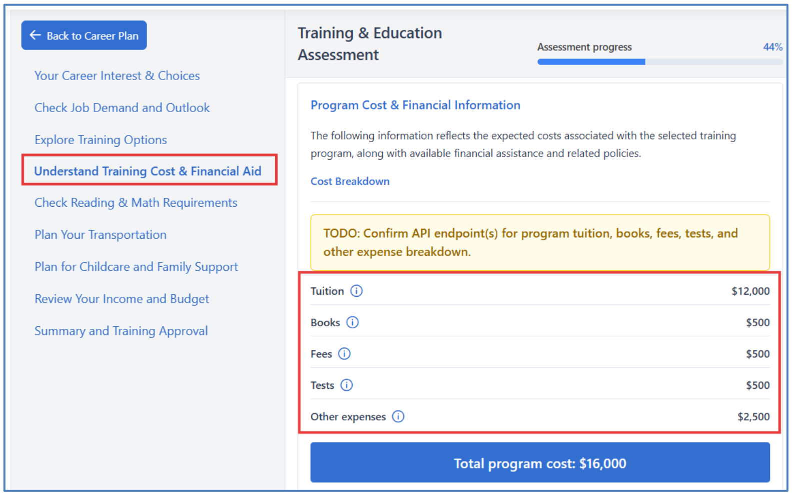
Explore Training Options

- Review bookmarked training programs at the top, if any (not all customers will have these).
- Explore the ETPL with the customer collaboratively. This should be a shared conversation.
- Confirm that the full state ETPL was shared with the customer (this is a WIOA requirement).



- Select the training program the customer plans to move forward with.
- Review the Provider & Program Overview that the system pulls in automatically.
- Confirm program alignment with the selected occupation and local policy. If either is "No," a different program must be selected.
- Enter a brief justification for the program choice — this becomes part of the case record.
- If the occupation matches a program in O*NET, alignment will auto-default to "Yes." Otherwise, the career planner makes that determination.

Understanding Training Cost & Financial Aid



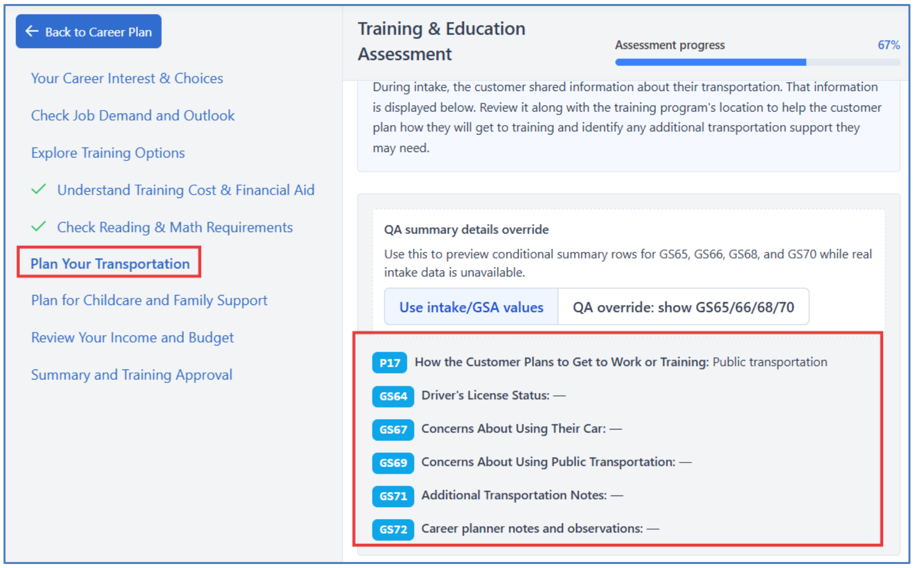
- Review the Program Cost and Financial Information section — tuition, books, fees, and more are pulled automatically from the ETPL.
- Review financial assistance options and refund policies with the customer.
- Document whether the customer has applied for financial aid (WIOA is the funder of last resort — other aid must be explored first).
- Document any financial aid the customer has already received.
- Confirm that you have discussed what WIOA will cover versus any out-of-pocket costs.
  - Note - These questions do not stop you from moving forward, but they ensure the conversation is documented.

Checking Reading and Math Requirements

- Review the exemptions section — check whether the customer has a degree, passing entrance exam, or is currently enrolled in postsecondary education. Upload documentation if the customer has exemption from the assessment.
- If no exemptions apply, an approved assessment must be added to the system.
- Review the Program Entry Requirements pulled directly from the ETPL (education, skills, and other criteria) and confirm whether the customer meets those requirements.
  - Note - If requirements are not met, select a different program before proceeding.

Plan Your Transportation

- Review the customer's transportation information pulled from intake (how they get around, license status, concerns).
- Review the distance comparison — it shows how far the customer is willing to travel versus the actual distance to the training program.
- If a gap exists, document the transportation plan (gas assistance, public transit, or other options).
- Confirm whether the customer still wants to move forward if transportation is a concern.

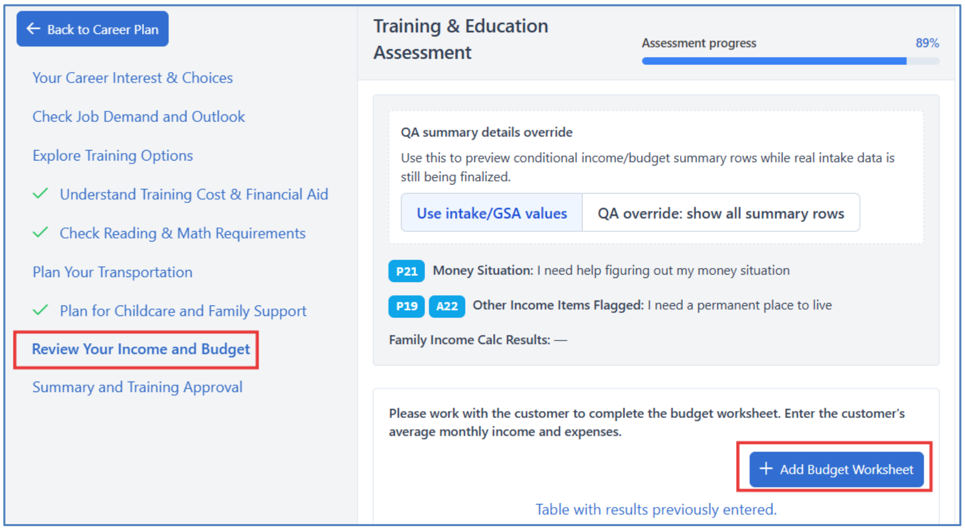


Plan for Childcare and Family Support

- Review the customer's childcare and family information pulled from intake.
- Review the training schedule alongside the customer's family responsibilities to assess whether it's manageable.
- Confirm the plan — whether support is already in place or if additional help (such as childcare assistance) is needed.
- Document how the customer will manage family responsibilities during training.

Review Your Income and Budget

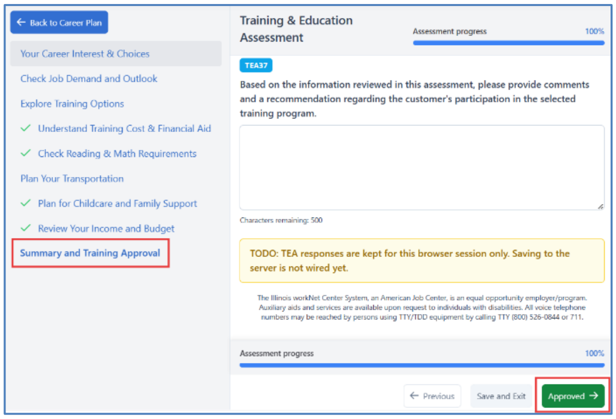
- Review the customer's income and expense information pulled from intake.
- Complete the embedded budget worksheet to map monthly income and expenses. The system calculates the difference automatically.



- Confirm whether training is financially manageable.
- If a gap exists, document the plan (supportive services, resources) to help close it.

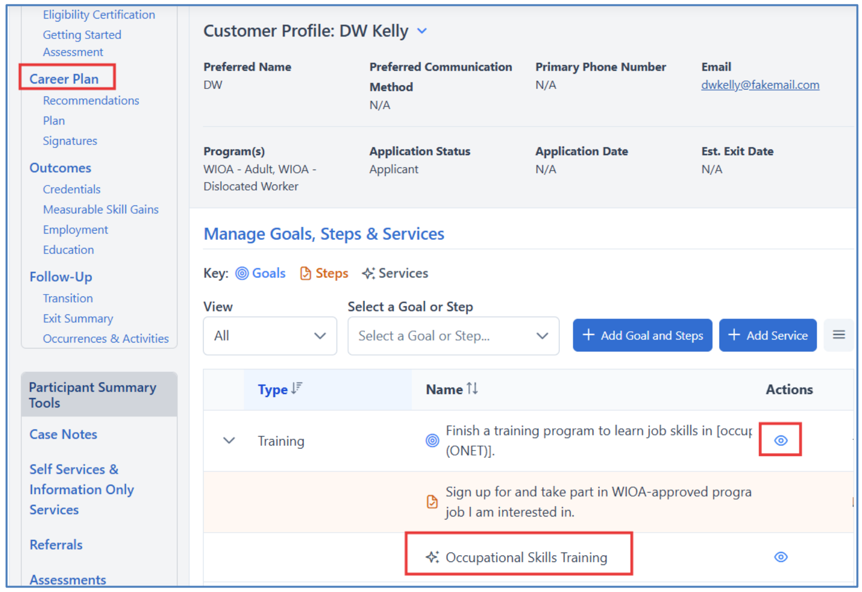
Summary and Training Approval

- Review the full summary with the customer. This brings everything together in one view, similar to Prescreen and Application Review.
- Make any updates if needed before approving.
- Enter a professional recommendation and clearly document whether you support the customer moving forward with the training program.
  - If a demand petition was involved, confirm its status.
- Click **Approved** to finalize the assessment.
  - Training services are now unlocked — you can start the service.
- Clicking Approve completes the process: one conversation, one decision, fully documented.



Open the Training or Education Service

- Navigate to Career Plan → Click the Plan Tab.
- Click the Eye icon to edit the Training or Education Goal.
- Click Save.
- Click Back to Career Plan.



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.