



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.

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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.

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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.

← Back to Career Plan

Your Career Interest & Choices

- ✓ Check Job Demand and Outlook
- Explore Training Options
- Understand Training Cost & Financial Aid
- Check Reading & Math Requirements
- Plan Your Transportation
- Plan for Childcare and Family Support
- Review Your Income and Budget
- Summary and Training Approval

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Assessment progress 22%

TEA11

Does the average wage for this occupation align with the customer's desired salary range?

Yes No

TEA12

Has the customer agreed to move forward with this occupation despite the wage difference?

No, it does not align with the customer's desired salary range

The customer cannot move forward with training for this occupation because the average wage does not align with the customer desired salary range. To move forward with completing the training assessment, a new occupation must be selected.

Find a New Occupation →

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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.

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TEA16 Select the program the customer plans to move forward with:

TODO: Confirm existing API endpoint(s) for ETPL program details / outcomes after primary program selection.

Career Pathway Certification Program — Example Training Institute

Provider & Program Overview

Provider Name: Example Training Institute
Program Name: Career Pathway Certification Program
Program Description: Hands-on instruction focused on job-ready skills aligned with industry standards.
Program Address: 123 Workforce Way, Springfield, IL 62701
Program Outcomes:
• Industry-recognized certificate: Welding Fabrication Certificate

The training program needs to align to the customer's selected occupation. Use the information below to ensure that the customer's training program will support their path to their selected occupation.

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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.

Program Cost & Financial Information	
The following information reflects the expected costs associated with the selected training program, along with available financial assistance and related policies.	
Cost Breakdown	
TODO: Confirm API endpoint(s) for program tuition, books, fees, tests, and other expense breakdown.	
Tuition	\$12,000
Books	\$500
Fees	\$500
Tests	\$500
Other expenses	\$2,500
Total program cost: \$16,000	



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.

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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.

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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.

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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.

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