



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.

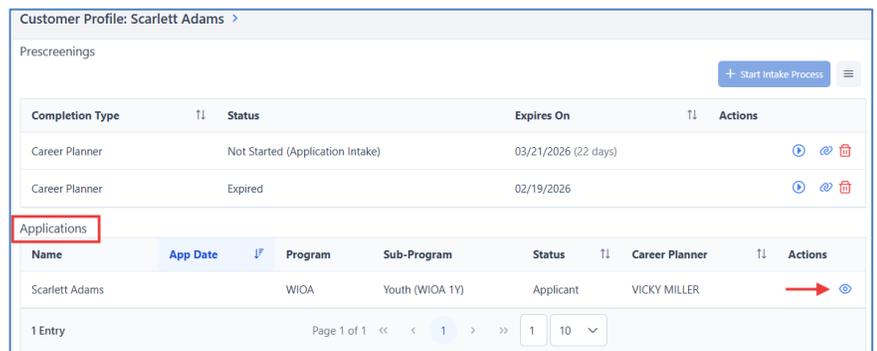
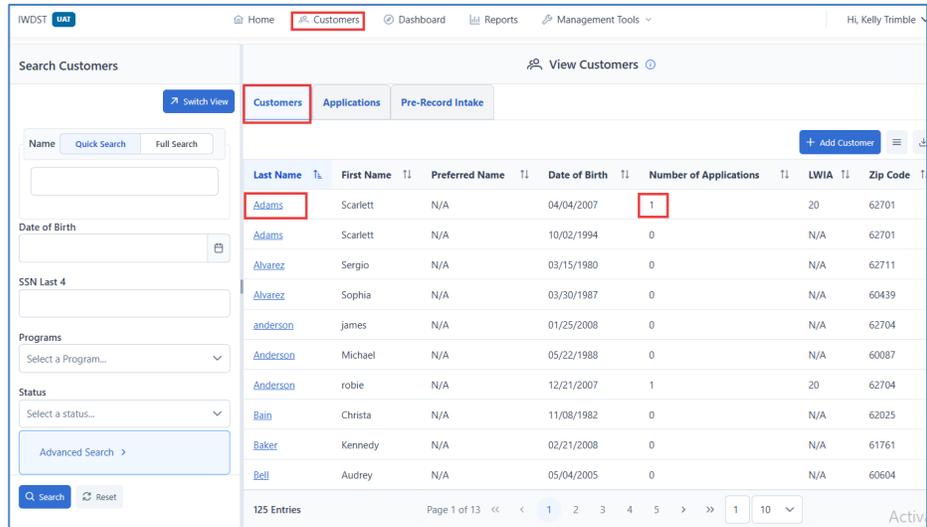
Audience

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 **Customers**.
- The View Customers Page is displayed.
- 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.
- Scroll to the Applications section of the customer profile – select the **View** icon.



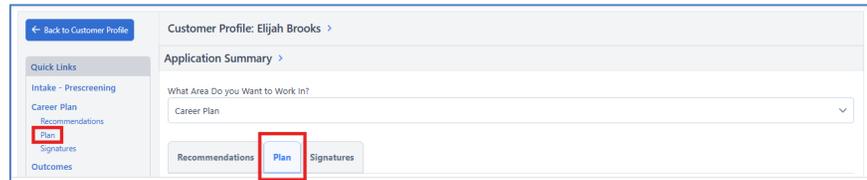
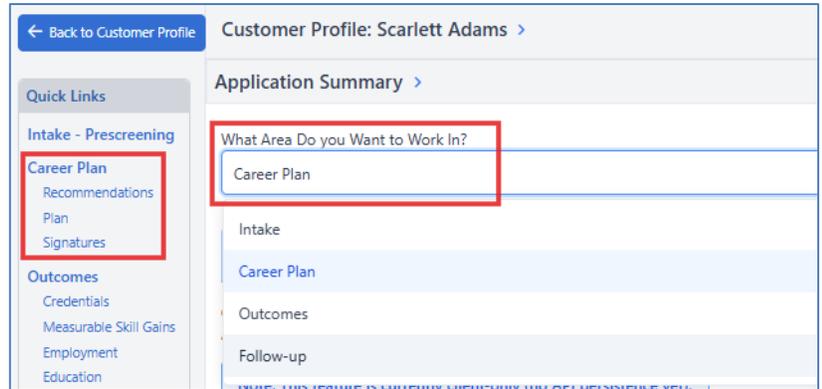
IWDS 2.0 Site



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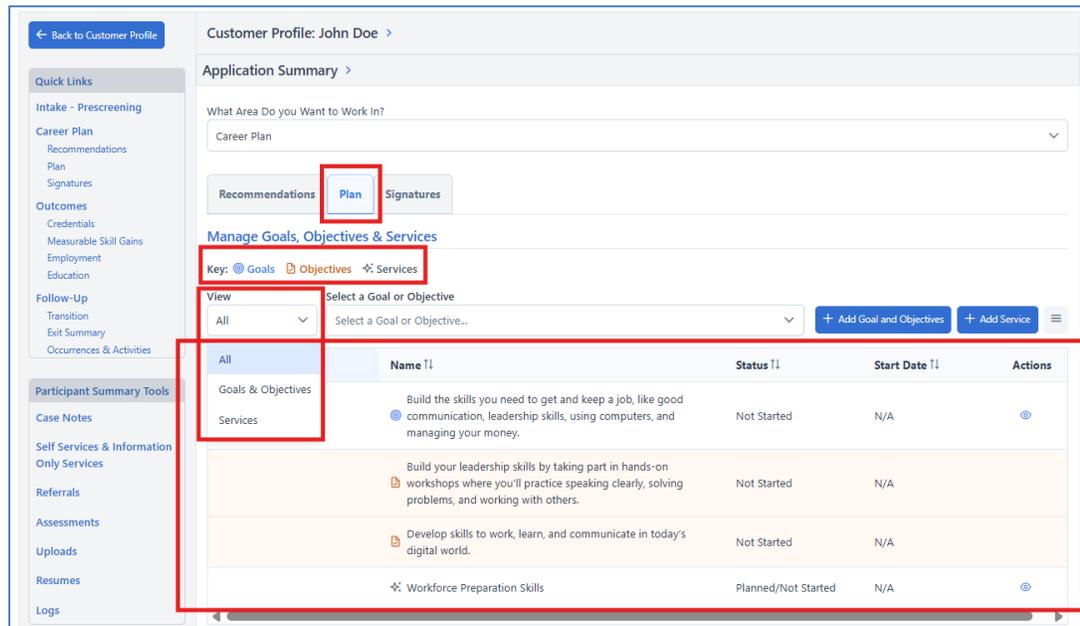
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- In the “Which Area do you want to work in” drop-down, select Career Plan.
 - Note** – you can also utilize the quick links on the left to access the Career Plan
- The Career Plan is divided into 3 tabs – Select the **Plan** tab or **Plan quick link**.



View the Career Plan Services

- The Career Plan consists of Goals, Objectives 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**.



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- **Note** – use the **Select a Goal or Objective 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.
- Selecting View Services allows for editing a Service when needed with the **Edit** Button.

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: Goals Objectives Services

View: Services Select a Goal or Objective Select a Goal or Objective... Show Unassigned Services Only + Add Service

EE	Name	Status	Start Date	End Date	Actions
	English Language Education	N/A - Goal Not Assigned	N/A (Planned)	N/A (Planned)	Eye icon

English Language Education

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

Goal: N/A

Edit



Add Services to Career Plan

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

Recommendations **Plan** Signatures

Manage Goals, Objectives & Services

Key: Goals Objectives Services

View: Services Select a Goal or Objective Select a Goal or Objective... Show Unassigned Services Only + Add Service

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- **Note** – In order to add a service, there must be a Goal & Objective associated.
- After selecting Add Service, the Add Services Page will display. Utilize the Keyword Search or Advanced Search as needed. Select the Goal and Objective 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.
- 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.

Add Services - David Doe - Adult (WIOA 1A)

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

Goal Objective

Advanced Search

Filtered Services

Service Level	Service Name	Program-SubProgram	Selected	Actions
Individualized Career Services	Financial Literacy Services	WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)	<input checked="" type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="info"/>
Basic Career Services (Staff Assisted)	Job Search Activities and Assistance (STAFF ASSISTED)	WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)	<input type="checkbox"/>	<input type="button" value="info"/>
Training Services	OJT - Private Sector	WIOA - Adult (WIOA 1A), WIOA - Dislocated Worker (WIOA 1D)	<input type="checkbox"/>	<input type="button" value="info"/>

Edit Service - Financial Literacy Services

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

Goal*

Objective*

Providing Entity*

Completion Status*

Start Date*

End Date

Comments

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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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