

CHAPTER 4:  
INTAKE PROCESS & CAREER PLANNING

- Intake Process
- Career Planning
- Program Training Outline

All Grantees must use the Illinois workNet (IWN) System for completing intake/eligibility, documenting assessments, creating a career plan, documenting actual services provided, facilitating/communicating participants progress and documenting outcomes.

### INTAKE PROCESS (IWN)

Each participant must go through an intake review process which includes consideration of suitability between the participant and the program. Part of intake process is to review and choose whether or not to participate in the program(s) offered by the Grantee. Even though a person may know something about the program, the intake form is solid way to determine a program match. To determine one's aptness for a program, the online intake form has a series of questions to determine interests, values, preferences, motivations, and abilities.

Once an assessment is completed, grantees have **10 working days** to complete eligibility, enroll the participant into the program, and provide case management services in the IWN system.



Tip

At enrollment it is a best practice to open the Career planning (Case Management) service in workNet.

1.  **For more information on getting started in the Illinois workNet system, see the JTED Partner Guide:** <https://www.illinoisworknet.com/partners/Pages/JTEDPartnerGuide.aspx>

In order to enroll into any program offered, grantees must have the following information for each participant documented in the IWN system.

### Eligibility Questions

1. Are you eligible for selective service?
2. Are you authorized to work in the United States (JTED participants must be citizens and nationals of the United States, lawfully admitted permanent resident aliens, refugees, asylees, and parolees, and other immigrants authorized by the Attorney General to work in the United States (Sec. 188 (a)(5)



Exception

Authorized to work in the United States is not required for In-School-Youth, the primary intent in continuing education in a career pathway and not employment.

3. Do you live in a Qualified Census Tract (QCT) or Disproportionately Impacted Area (DIA) or receive services in a QCT or DIA?
4. Were you negatively impacted by Covid?
  - a. Have you experienced unemployment or increased food or housing insecurity due to the COVID-19 pandemic?
  - b. Are you a low-income or moderate-income individual, which experienced negative impacts due to the COVID-19 pandemic?
  - c. Has there been a loss of instructional time in K-12 schools: any student that lost access to in-person instruction for a significant period of time.



**Confirm or Register for Selective Service:** [www.sss.gov](http://www.sss.gov)



**Documentation to Prove Eligible to Work in the US:**

- Enhanced Driver's License/REAL ID
- Birth certificate (original or certified copy issued by a state, county, municipal authority or outlying possession of the United States)
- Certificate of Naturalization (INS Form N550 or N-570)
- Hospital record of birth or baptismal/church record (if place of birth shown)
- U.S. social security card issued by the Social Security Administration (other than a card that indicates not valid for employment)
- U.S. Passport (Unexpired or Expired)
- E-Verify with documentation
- Certificate of U.S. Citizenship (INS Form N560 or N-561)
- Consular Report of Birth Abroad or Certification of Birth
- Certification of Birth Abroad issued by the Department of State (Form FS-240, Form FS-545 or Form DS-1350)
- Alien Registration Card indicating Right to Work
- DD-214 / Report of Transfer or Discharge
- Permanent Resident Card or Alien Registration Receipt Card with photograph (INS Form I-151 or I-551)
- Foreign Passport stamped eligible to work
- Unexpired Foreign Passport, with I-551 stamp or attached INS Form I-94 indicating unexpired employment authorization
- Unexpired Temporary Resident Card (INS Form I-688)
- Unexpired Employment Authorization Document (INS Form I-688A, I-688B, or I766) with or without photograph
- Unexpired Reentry Permit (INS Form I-327)
- Unexpired Refugee Travel Document (INS Form I-571)
- ID Card for use of Resident Citizen in the United States (INS Form I-179)
- Self-attestation on how to meet DACA requirements outlined in – DOL TEGL 02- 14

**NOTE: Another verification source list is the “List of Acceptable Documents Used for INS Form I-9 to Determine Identity and Employment Eligibility”. One verification source from List A OR one verification source from List B AND one verification source from List C are required to determine Identity and Employment Eligibility) [Employment Eligibility Verification | USCIS](#)**



**Qualified Census Tracts and Disproportionately Impacted Areas:** [Illinoisworknet.com/qcTdiemap](http://Illinoisworknet.com/qcTdiemap)



**Low-Income** as defined by the Secretary of the Treasury (Treasury) rules for the American Rescue Plan Act of 2021 (ARPA) that established the Coronavirus State and Local Fiscal Recovery Funds (SLFRF) definition of low income as (i) income at or below 185 percent of the Federal Poverty Guidelines (FPG) for the size of its household based on the most recently published poverty guidelines by the Department of Health and Human Services (HHS).

"Low-income individual" means an individual who:

receives, or in the past 12 months has received, or is a member of a family household that is receiving or in the past 12 months has received, assistance through:

- Children’s Health Insurance Program (CHIP);
- Childcare Subsidies through the Child Care and Development Fund (CCDF) Program;
- Medicaid;
- National Housing Trust Fund (HTF), for affordable housing programs only;
- Home Investment Partnerships Program (HOME), for affordable housing programs only;
- Temporary Assistance for Needy Families (TANF);
- Supplemental Nutrition Assistance Program (SNAP);
- Free and Reduced-Price Lunch (NSLP) and/or School Breakfast (SBP) programs;
- Medicare Part D Low-income Subsidies;
- Supplemental Security Income (SSI);
- Head Start and/or Early Head Start;
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC);
- Section 8 Vouchers;
- Low-Income Home Energy Assistance Program (LIHEAP);
- Pell Grants;

or

has income that is at or below 185 percent of the Federal Poverty Guidelines (FPG) for the size of their household based on the most recently published poverty guidelines by the U.S. Department of Health and Human Services (HHS);

Below are the current low-income guidelines:

2022 POVERTY GUIDELINES FOR THE 48 CONTIGUOUS STATES AND THE DISTRICT OF COLUMBIA

Persons in family/household	Poverty guideline	JTED Eligibility 185% of FPG
1	\$13,590	\$ 25,142
2	\$18,310	\$ 33,874
3	\$23,030	\$ 42,606
4	\$27,750	\$ 51,338
5	\$32,470	\$ 60,070
6	\$37,190	\$ 68,802
7	\$41,910	\$ 77,534
8	\$46,630	\$ 86,266
For families/households with more than 8 persons, add \$4,720 for each additional person.		

[Poverty Guidelines | ASPE \(hhs.gov\)](#)



**Moderate-Income** as defined by the Secretary of the Treasury (Treasury) rules for the American Rescue Plan Act of 2021 (ARPA) that established the Coronavirus State and Local Fiscal Recovery Funds (SLFRF) definition of moderate income as income at or below 300 percent of the FPG for the size of its household based on the most recently published poverty guidelines by HHS.

"Moderate-income individual" means an individual whose income is at or below 300% of the FPG for the size of their household based on the most recently published poverty guidelines by HHS.

Below are the current moderate-income guidelines:

2022 POVERTY GUIDELINES FOR THE 48 CONTIGUOUS STATES AND THE DISTRICT OF COLUMBIA

Persons in family/household	Poverty guideline	JTED Eligibility 300% of FPG
1	\$13,590	\$ 40,770
2	\$18,310	\$ 54,930
3	\$23,030	\$ 69,090
4	\$27,750	\$ 83,250
5	\$32,470	\$ 97,410
6	\$37,190	\$ 111,570
7	\$41,910	\$ 125,730
8	\$46,630	\$ 139,890
For families/households with more than 8 persons, add \$4,720 for each additional person.		

[Poverty Guidelines | ASPE \(hhs.gov\)](#)

### Comprehensive Assessment

A thorough assessment is the foundation for understanding the participant's employment goals, existing skills, career readiness and determining all barriers to employment that may exist. It is neither a one-time activity nor is it a one-size-fits-all approach. Assessments help prepare participants in determining existing skills, identifying those that require additional training, developing an employment plan, and connecting them to services through appropriate referrals. The type of assessment should be determined by the circumstances of a client. For example, a participant in the Category 2 (Employer Focus) receiving training for skill upgrades with the existing employer may need minimal assessments; a Category 1 (Jobseeker Focus) that needs a GED or High School Equivalency may need basic skills assessments.

At a minimum the assessment process must be appropriate for the participant and address the areas below to inform the employment plan. Areas the applicant will need to assess for include:

- Employment goals
- Interest and skills inventory
- Essential employability skills
- Basic Skills deficiency
- Digital and financial literacy assessment
- Barriers to employment
- Suitability for the desired training program
- Review of training options that align with interest and skills inventory
- Employer assessments
- Determination of referrals

Additionally, assessments must evaluate and identify suitability of the participant when developing the employment goals, appropriate achievement objectives, and the needed combination of services to address barriers.

Suitability includes working with the participant on:

- Aligning career goals to interests, skills, and abilities;
- Reviewing occupational profiles and employment outlooks for the selected occupation. This not only includes wage information, and training needed, but also includes what employees do in the job; and
- Exploring the career services that are needed to achieve the participants' employment goals
- Researching the training services that are needed to achieve the participants' employment goals that include, but not limited to:
  - Assessing the participant's preferred training delivery method (traditional classroom, virtual, hands-on)
  - Assessing the cost and the length of the training program
  - Considering work-based-learning opportunities including, but not limited to, Registered Apprenticeships, On-the-Job Training, Transitional Job, and/or work experience
  - Finding the supportive services and/or barrier reduction that are needed to achieve the participants' employment goals

The information garnered from the comprehensive assessment is used to develop the Career Plan. This plan outlines the steps the participant will need to complete the successful transition from training to

employment and beyond. Once the assessment is administered, results are reviewed and documented. Information is then entered into IWN by the grantee. Analysis of the results will determine the need for additional assessments to be administered.

To help guide grantees in selecting which basic skills assessments may be appropriate for their participants, we have listed some of the available assessments as well as a brief summary of their function.

**Assessments- [Illinois workNet Home](#)**

Type of Assessment	<i>Summary of Assessment</i>
CASAS Goals	CASAS Goals will determine the basic academic level (Reading & Math) for participants. It is available in Spanish and is administered online. The results include a narrative assessment on the individual's skills.
TABE 11 & 12	TABE will determine the basic academic level (Reading & Math) for participants. It is available in Spanish and is administered online and through a paper copy.
Casey Life Skills	The Casey Life Skills Assessment which is traditionally used for youth in foster care is a free tool that assesses the behaviors and competencies youth need to achieve their long-term goals. It aims to set youth on their way toward developing healthy, productive lives. It also highlights life skills and interest of the participant.
Best/Best Plus	Best/Best Plus is a face-to-face oral interview designed to assess the English language proficiency of adult English language learners in the United States.

While one of four formal assessments may be used (the TABE ([Test of Adult Basic Education](#)), CASA Goals ([Comprehensive Adult Student Assessment System](#)), [BEST and/or BEST Plus](#)), it is common practice to use the TABE to determine proficiency in math and reading.

To ensure both consistency in processes and validity in identifying appropriate instructional levels, all staff members administering assessments are required to have participated in the online training offered by the Illinois Community College Board Adult Education Professional Development Network (PDN) for any assessment test they will be administering. In addition to professional development for face-to-face assessments, the PDN developed online training courses for remote proctoring of assessments.

Professional development is available for administering the TABE 11&12 and CASAS GOALS (Reading and Math) tests for English speaking individuals and the BEST Literacy™, BEST Plus™ 2.0, or CASAS Life and Work Reading for English Language Learners can be found on the Illinois Learning, Educational and Academic Resource Network (iLearn).

While the above list of assessments is provided as a resource, each grantee has the option to use their own assessments or industry-recognized assessments to assist participants.

## CAREER PLANNING

Career planning is a customer-centered approach in the delivery of services to prepare and coordinate comprehensive career (employment) plans for participants that ensures access to workforce activities and supportive services during program participation and continuing for one (1) year after job placement.

Successful career planning is a collaborative and ongoing process rather than a one-time activity. The process is individualized to the job seeker and prepares them for obtaining employment that leads to self-sufficiency and places them on a path for lifelong learning. Effective career planning includes assessment, career readiness activities, preparation, and training along with appropriate job matching and placement ending with one (1) year of follow up. Providing supportive services and conducting follow-up are essential to the success of the jobseeker.

Key components of career planning include building rapport, effectively communicating, identifying appropriate services, convening key service providers, connecting participants with services, creating a strong employment plan, motivating, and encouraging participants, following up after an appointment(s), monitoring services, and follow-up after job placement to ensure success. Additionally, keeping accurate, timely, and descriptive records of career planning efforts through appropriate case management is essential.

Items to consider when developing a career planning:

- customer engagement
- application and eligibility determination
- the use of the basic skills screening tool
- the components of effective assessments
- the development of the career plan
- proper service documentation into the appropriate case management system
- the importance of case notes and file maintenance

Like the assessment, the Career Plan is a living document that identifies employment and education goals as part of a Career Pathway, objectives, and the appropriate combination of services for the participant to reach the goals. It is to be developed collaboratively between the career planner and the participant with mutually established goals. The plans must be developed after an objective assessment is completed and reflect the expressed interests and needs of the participant. Once developed, it must be signed by the participant and properly documented in the approved case management system. A copy should be provided to the participant, and a hard copy placed in the file. The Career Plan should be written with a S.M.A.R.T.E.R objective:

<b>Specific</b>	Identify specific short/long-term goals. Specific objectives are the action steps that outline exactly what the participant should do to achieve their goal(s).
<b>Measurable</b>	Define how progress will be tracked. Goals are measurable by the <i>Completion</i> of objectives. Measurable goals have benchmarks allowing the participant to see the progress towards successfully achieving goals.
<b>Attainable</b>	Goals and objectives are attainable if the participant can be realistically expected to complete the goal within the timeframe agreed upon.
<b>Relevant</b>	Goals and objectives must be relevant to what the participant is trying to achieve. An appropriate objective will be an action step toward completing the goal. The use of the comprehensive and



	specialized assessments will guide with creating relevant goals and objectives.
<b>Time-Driven</b>	There should be a target date of progress and completion. A goal without a commitment to a schedule or target dates tends to be forgotten or neglected. This will keep the participant on track and both parties accountable. Goals and defined as short, intermediate, or long-term.
<b>Evaluate</b>	Goals, objectives, activities/services, and <i>Case Notes</i> should be reviewed to assess the success or failure in achieving a participant's Career Plan completion.
<b>Reflection and Adjustment</b>	Reflection is a great way for a participant to increase confidence and be more proactive and excited to complete their plan. If any goal changes occur, the plan must be adjusted and mutually agreed upon with the participant.



Tip

When creating the Career Plan, please ensure that all service dates and expectations are realistic to the client and their goals.

#### 14 Elements for A Good Career Plan

Services are assigned to the participant based on the assessment review and goals created. Plans may vary dependent on if the customer is a job seeker, employed but needs a skill upgrade, or a youth. The plan should include one or more services that relates to the 14 elements. Educational services must include instructional approaches that offer a continuum of skill, grade-level, and developmentally appropriate educational options that connect to career pathways. Below are the 14 elements that should be considered when an agency created a successful program:

1. Tutoring, study skills training, instruction and dropout prevention strategies that lead to completion of a high school diploma includes services such as providing academic support, helping a customer identify areas of academic concern, assisting with overcoming learning obstacles, or providing tools and resources to develop learning strategies. Dropout prevention strategies intended to lead to a high school diploma include activities that keep a young person in-school and engaged in a formal learning and/or training setting.
2. Alternative secondary school services assist participants who have struggled in traditional secondary education. Dropout recovery services are those that assist participants who have dropped out of school. Both types of services help participants to re-engage in education that leads to the completion of a recognized high school equivalent. Examples of activities under this program element include the following:
  - Basic education skills training
  - Individualized academic instruction
  - English as a Second Language training
  - Credit recovery
  - Counseling and educational plan development

3. Paid and unpaid work experience is a planned, structured learning experience that takes place in a workplace and provides customers with opportunities for career exploration and skill development. A work experience may take place in the private for-profit section, the non-profit sector, or the public sector. Work experience for participants: summer employment and other employment opportunities available throughout the school year, pre-apprenticeship programs, internships and job shadowing, and on-the-job training.
4. Occupational skills training is an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels. Occupational skills training includes the following:
  - is outcome-oriented and focused on an occupational goal specified in the individual service strategy for the participant
  - is of sufficient duration to impart the skills needed to meet the occupational goal
  - leads to the attainment of a recognized postsecondary credential
5. Education offered concurrently with workforce preparation and training for a specific occupation element reflects an integrated education and training model and describes how workforce preparation activities, basic academic skills, and hands-on occupational skills training are to be taught within the same time frame and connected to training in a specific occupation, occupational cluster, or career pathway.
6. Leadership development opportunities encourage responsibility, confidence, employability, self-determination, and other positive social behaviors. Leadership development includes:
  - Exposure to postsecondary educational possibilities
  - Community and service-learning projects
  - Peer-centered activities, including peer mentoring and tutoring
  - Organizational and teamwork training, including team leadership training
  - Training in decision-making, including determining priorities and problem solving
  - Citizenship training, including life skills training such as parenting and work behavior training
  - Civic engagement activities which promote the quality of life in a community
  - Other leadership activities that place participants in a leadership role, such as serving on leadership committees
7. Supportive services enable an individual to participate in WIOA activities. These services enable an individual to participate in WIOA activities (such as, but not limited to, assistance with transportation, childcare, housing, health care, educational testing, and work-related tools).
8. Adult mentoring is a formal relationship between a youth participant and an adult mentor that includes structured activities where the mentor offers guidance, support, and encouragement to develop the competence and character of the mentee. Mentors should be someone other than a case manager.

9. Follow-up services are critical services provided following a participant's exit from the program. The goal of follow-up services is to help ensure that participants are successful in employment and/or postsecondary education and training. Follow-up services may include regular contact with a participant's employer, including assistance in addressing work-related problems that arise.
10. Comprehensive guidance and counseling provides individualized counseling to participants. This program element also includes substance and alcohol abuse counseling, mental health counseling, and referral to partner programs.
11. Financial literacy education provides participants with the knowledge and skills that they need to achieve long-term financial stability. Financial literacy education encompasses information and activities on a range of topics, such as creating budgets; setting up checking and saving accounts; managing spending, credit, and debt; understanding credit reports and credit scores; and protecting against identify theft.
12. Entrepreneurial skills training provides the basics of starting and operating a small business. This training helps participants develop the skills associated with entrepreneurship, such as the ability to take initiative, creatively seek out and identify business opportunities, develop budgets, and forecast resource needs, understand various options for acquiring capital and the trade-offs associated with each option, and communicate effectively and market oneself and one's ideas. Examples of approaches to teaching youth entrepreneurial skills include:
  - Entrepreneurship education introducing to the values and basics of starting and running a business, such as developing a business plan and simulations of business start-up and operation
  - Enterprise development, which provides supports, and services that incubate and help youth develop their own businesses, such as helping participants access small loans or grants and providing more individualized attention to the development of viable business ideas
  - Experiential programs that provide participants with experience in the day to-day operation of a business
13. Services that provide labor market and employment information about in demand industry sectors or occupations available in the local area and includes career awareness, career counseling, and career exploration services. Labor market information also identifies employment opportunities, and provides knowledge of job market expectations, including education and skill requirements and potential earnings. Numerous tools and applications are available that are user-friendly and can be used to provide labor market and career information to youth. These tools can be used to help youth make appropriate decisions about education and careers.
14. Postsecondary preparation and transition activities help participants prepare for and transition to postsecondary education and training. These services include helping participants explore postsecondary education options, including technical training schools, community colleges, 4-year colleges and universities, and Registered Apprenticeship programs. Examples of other postsecondary preparation and transition activities include:

- Assisting youth to prepare for SAT/ACT testing
- Assisting with college admission applications
- Searching and applying for scholarships and grants
- Filling out the proper Financial Aid applications and adhering to changing guidelines
- Connecting youth to postsecondary education program.

### ESSENTIAL EMPLOYABILITY SKILLS



important

Grantees are expected to incorporate the Illinois Essential Employability Skills Framework into their programs. The Illinois Essential Employability Skills Framework is designed to define and clarify the essential employability skills and provide a standard for the state. The Essential Employability Skills Framework has been cross-walked to the [Illinois workNet Job Skills Guide](#). Essential employability skills are those general skills that are required to be successful in all sectors of the labor market and are separate from the technical skills attained in career pathways or academic skills such as math and reading. The framework includes four elements:

1. Personal Ethic: integrity, respect, perseverance, positive attitude
2. Work Ethic: dependability, professionalism
3. Communication Skills: active listening, clear communication
4. Teamwork: critical thinking, effective and cooperative work

The framework will assist programs with self-assessment to ensure that technical and basic skills training aligns with the Illinois Essential Employability Skills Framework. The document is divided into two sections. Section one includes an overview of the Illinois Essential Employability Skills Framework. Section two is the Essential Employability Skills Program Self-Assessment. The first part of the assessment focuses on developing program goals related to the framework. The second part of the assessment addresses exposure to employability skills in classrooms and work-based learning activities and is designed to provide an opportunity to reflect on how instruction is aligned with the framework's definition of essential employability skills. To access the Illinois Essential Employability Skills Framework and Self-Assessment, click on the following link:



**Essential Employability Skills Framework:** <https://icsps.illinoisstate.edu/cte/cte-resources/2-home/63-illinois-essential-employability-skills-framework>