

### Purpose:

To provide a tool case workers/career navigators can use to develop Individualized Services, Training and Employment Plan that:

- Documents achievements and goals.
- Identifies steps needed to achieve those goals.
- Documents current status and flags when intervention is needed.

### Highlights:

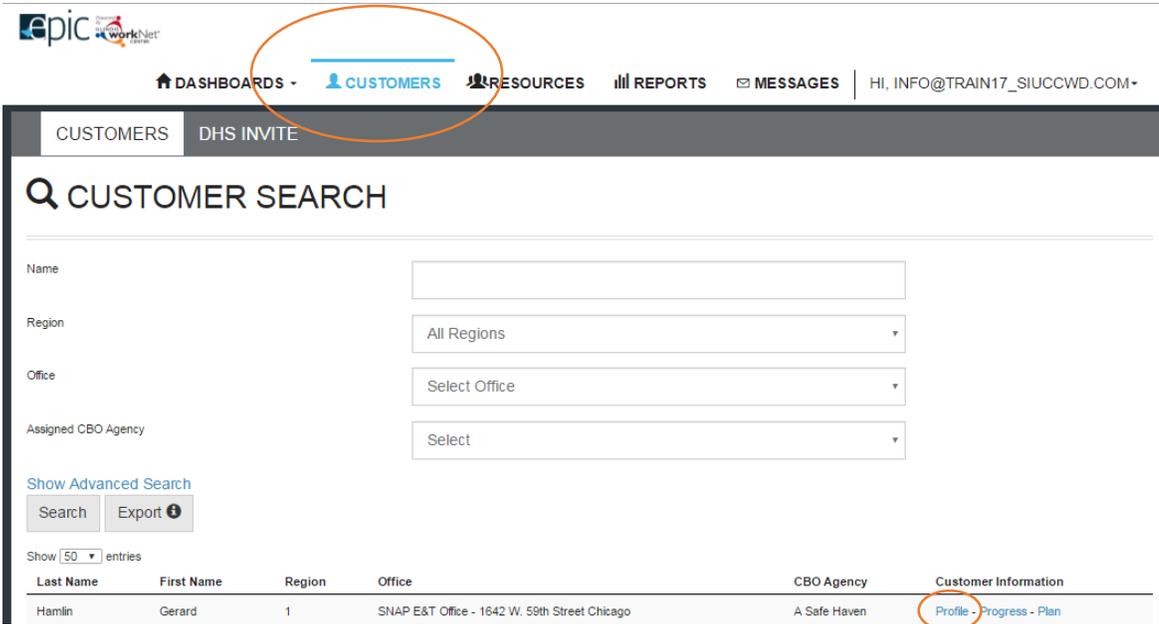
- Customer information submitted during the EPIC application process is used to populate the ISTEP.
- The career navigator reviews the information and identifies recommended next steps that include: start/end dates, status, notes, and earned credentials (when applicable upon successful completion of the item).
- The career navigator adds recommended steps by selecting from a list of steps/services that are aligned to IWDS services. Co-enrolled EPIC/WIOA customers that have ISTEP services identified will automatically populate IWDS.
- Customers will be able to view through their Illinois workNet account. Recommended steps will be displayed using customer-friendly text with links to related resources in Illinois workNet.
- The ISTEP was developed based on feedback from Commerce and Career Planners. This is the initial release and development is ongoing. Career navigators and program partners will continue to be involved in the co-engineering process to develop a useful, universal tool for all Illinois workNet partners.

**Who can use the ISTEP?** Only staff and customers, that have been given access to the program, can view the ISTEP.

- **Statewide User Roles** - Statewide staff view/edit ISTEPs for all customers who have submitted an EPIC application.
- **Career Planner/Case Worker Role** - Staff can view/edit ISTEPs for customers in their region/office who have submitted an EPIC application.
- **CBO Role** - Staff can view/edit ISTEPs for customers in their region/office who have submitted an EPIC application.
- **Partner Roles** - Staff can view/edit ISTEPs for customers, in their team, who have submitted an EPIC application. Some personal identifiable information is hidden from this role (i.e., email, address, phone, etc.).
- **Customers** – Customer's, who have submitted an EPIC application, will be able to view their ISTEP through their EPIC program tools located in My Dashboard (*coming soon*).

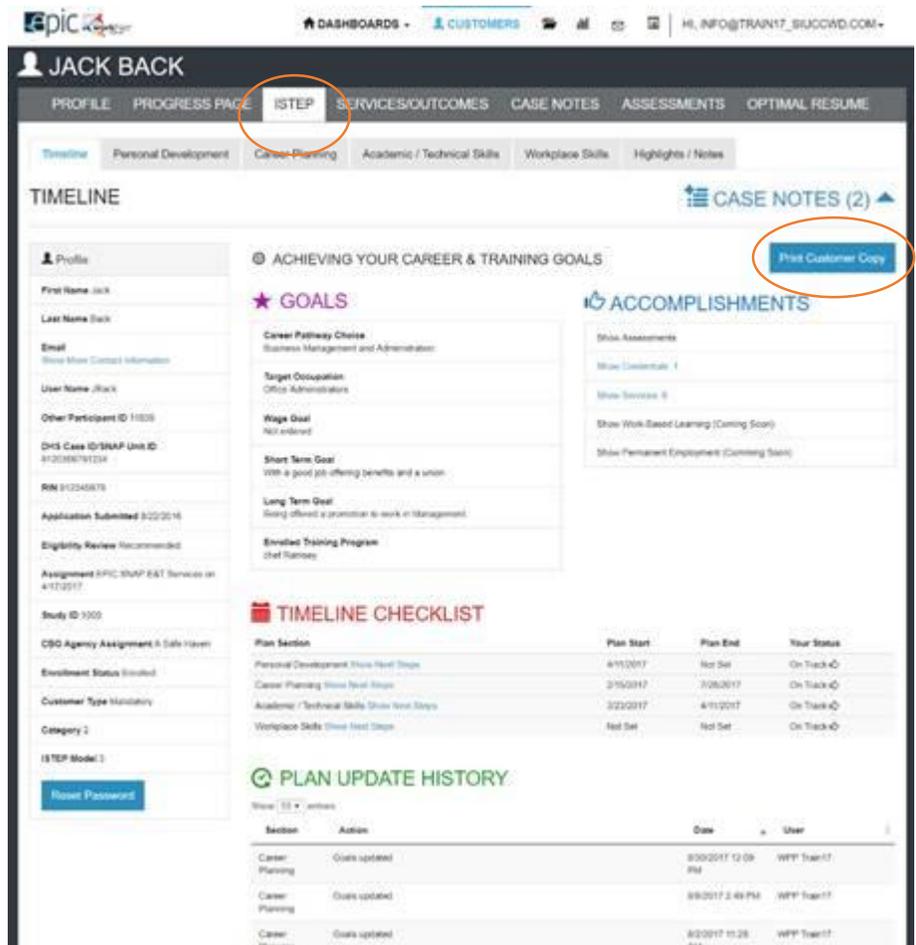
### How do you access the ISTEP?

1. Go to [www.illinoisworknet.com](http://www.illinoisworknet.com) and **log in** to your account.
2. Go to **My Dashboard** and select **Partner Tools**.
3. Select **EPIC Partner Tools**.
4. Access the list of customers and select the customer's **Profile** link.
5. Once in the customer's profile, select the **ISTEP** tab.



Once on the customer’s profile, select ISTEP.

Add steps based upon the plan established for the training program selected for the customer. When finished adding steps, print a copy for the customer, obtain a signature, and retain a signed paper copy in the customer file. Give a copy to the customer. A copy of the signed version can be uploaded to the customer progress page, but is not required.



## How is the ISTEP organized?

### The Main ISTEP Navigation



#### Timeline includes:

- Customer goals.
- Easy access to customer accomplishments documented in Illinois workNet.
- ISTEP timeline and status overview.
- History of ISTEP updates.

**Personal Development** – Includes a checklist and notes area to identify potential employment barriers. A referral area provides a tool to communicate local resources and services that can help the customer manage or overcome their barriers.

**Career Planning** – Includes a summary of academic achievements documented in the system. It also includes an area for career navigators to identify the steps needed to gain the academic, technical, and work place skills to earn the credentials to make them a competitive job candidate.

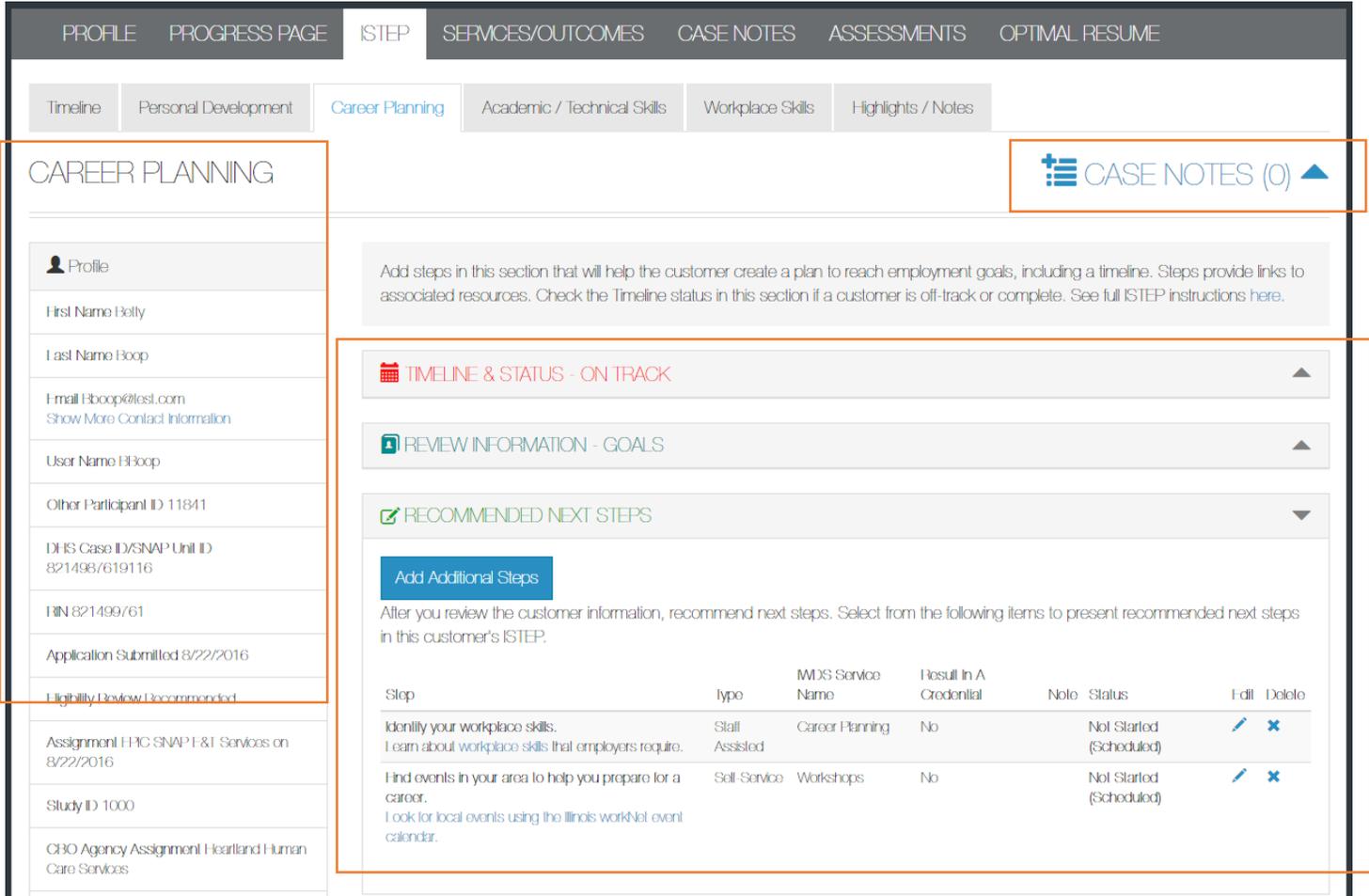
**Academic/Technical Skills** – Includes an area to identify training and career goals. It also includes an area for career planners to identify the steps needed to make informed decisions in developing a career plan.

**Find a Job (coming soon)** – Will include an area to review the customer’s employment history. It will also include an area for career navigators to identify the steps for developing a job search plan and preparing for the application and interviewing process.

**Work Experience** – Includes an area to review the customer’s work experience (i.e., job shadowing, internship, work site placement, etc.). It also includes an area for career navigators to identify steps for preparing and completing a training work experience, as well as adding them to a work experience site. Additionally, a customer’s payroll can be reviewed in this area.

**Highlights/Notes** – Is a summary of the files and case notes that were entered for each section of the ISTEP.

Main Page Sections –



**CAREER PLANNING**

Profile

First Name Eboyl

Last Name Eboop

Email Eboop@test.com  
Show More Contact Information

User Name EBoop

Other Participant ID 11841

DHS Case ID/SNAP Unit ID  
821498/619116

FIN 821499/61

Application Submitted 8/22/2016

Eligibility Review Recommended

Assignment EHC SNAP E&I Services on  
8/22/2016

Study ID 1000

CBO Agency Assignment Heartland Human  
Care Services

CASE NOTES (0)

Add steps in this section that will help the customer create a plan to reach employment goals, including a timeline. Steps provide links to associated resources. Check the Timeline status in this section if a customer is off-track or complete. See full ISTEP instructions [here](#).

**TIMELINE & STATUS - ON TRACK**

**REVIEW INFORMATION - GOALS**

**RECOMMENDED NEXT STEPS**

Add Additional Steps

After you review the customer information, recommend next steps. Select from the following items to present recommended next steps in this customer's ISTEP.

Step	Type	IWDS Service Name	Result In A Credential	Note	Status	Edit	Delete
Identify your workplace skills. Learn about workplace skills that employers require.	Staff Assisted	Career Planning	No		Not Started (Scheduled)		
Find events in your area to help you prepare for a career. Look for local events using the Illinois workNet event calendar.	Self-Service	Workshops	No		Not Started (Scheduled)		

**Case Notes** – Allows career planners/partner to enter case notes to document changes, updates, and other notes.

**Profile** provides:

- Summary of customer information.
- Message button.
- Upload file tool.

**Brief Introduction** – Is visible to both career planners and customers.

**Timeline and Status** – Includes start and end dates for the section. The start and end dates are automatically generated by the recommended next steps for the section. Also it includes a section status tool to identify:

- On Track = customer is continuing to progress through the steps in this section of the plan at an acceptable rate. This status is the default setting.
- Off Track = customer is not progressing through the steps in this section of the plan at an acceptable rate. This status has to be set by a career planner or partner.
- Complete = career navigator or partner has verified the customer has completed this section of the plan. This status has to be set by a career planner or partner.

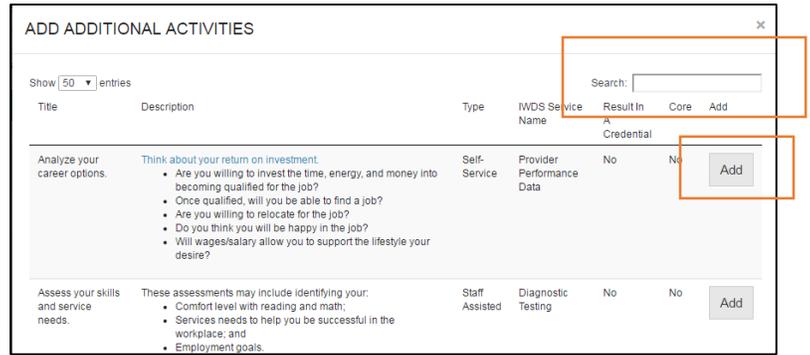
**Review Information** – Includes customer information that will be helpful in recommending next steps for the section. When possible the customer’s information, which has been entered into the system via the customer’s application and achievements, will populate this area. The career navigator/partner can update this section manually by selecting the **edit** button within the section, make changes, and then save the updates.

**Recommended Next Steps** – Are selected by the career navigator/partner.

The default display does not include steps.

Add steps by selecting the Add Additional Steps button.

- Search using a keyword to narrow your results.
- Steps will populate in the order they were entered (*Future enhancement = add a default order and sort functions in each column*).



Add Additional Steps

After you review the customer information, recommend next steps. Select from present recommended next steps in this customer's ISTEP.

Type of service for Dashboard reporting.

Steps are identified as Staff Assisted or Self-Service.

Step	Type	IWDS Service Name	Result In A Credential	Note	Status	Edit	Delete
<b>Assess your skills and service needs.</b> These assessments may include identifying your: <ul style="list-style-type: none"> <li>• Comfort level with reading and math;</li> <li>• Services needs to help you be successful in the workplace; and</li> <li>• Employment goals.</li> </ul>	Staff Assisted	Diagnostic Testing	No		Not Started (Scheduled) Due: 5/16/2016 Required		

**Get organized.**  
 Collect/document your work history, education/transcripts, certifications, license(s), references, letters of recommendation, identify your job/technical skills, transferable skills, soft skills, military skills.

Start a draft resume using the resume builder in Illinois workNet. We will take a look at your employment and education history when we meet on Monday.

<b>Prepare your resume.</b> Select type of resume and start writing. Customize your resume based on the job description and requirements. Each customized resume should be proofread by a minimum of 2 people (other than you). Disproofread your resume.	Staff Assisted	Self-Directed Job Search	No		Not Started (Scheduled) Due: 5/13/2016 Required		
<b>Explore jobs, required skill/credentials, and wage information.</b> Look at occupation job information for careers that may be related to your interests. Compare the jobs.					Not Started (Scheduled)		
<b>Identify your workplace skills.</b> Learn about workplace skills that employers require.					Not Started (Scheduled)		

**Analyze your career options.**  
 Think about your return on investment.
 

- Are you willing to invest the time, energy, and money into becoming qualified for the job?
- Once qualified, will you be able to find a job?
- Are you willing to relocate for the job?
- Do you think you will be happy in the job?
- Will wages/salary allow you to support the lifestyle your desire?

Steps include a brief overview of the step and link to related resources in Illinois workNet when available.

Notes:  
 Customers will not see the IWDS Service Name, Edit, or Delete columns.  
 Services are tied to IWDS services and can populate IWDS registrant customers.

**Establishing Target Pathway and Occupation** - Each customer who is enrolled should have Target Pathway and Target Occupation selected.

Access the customer ISTEP.

Select Career Planning tab.

Select “Review Information – Goals”

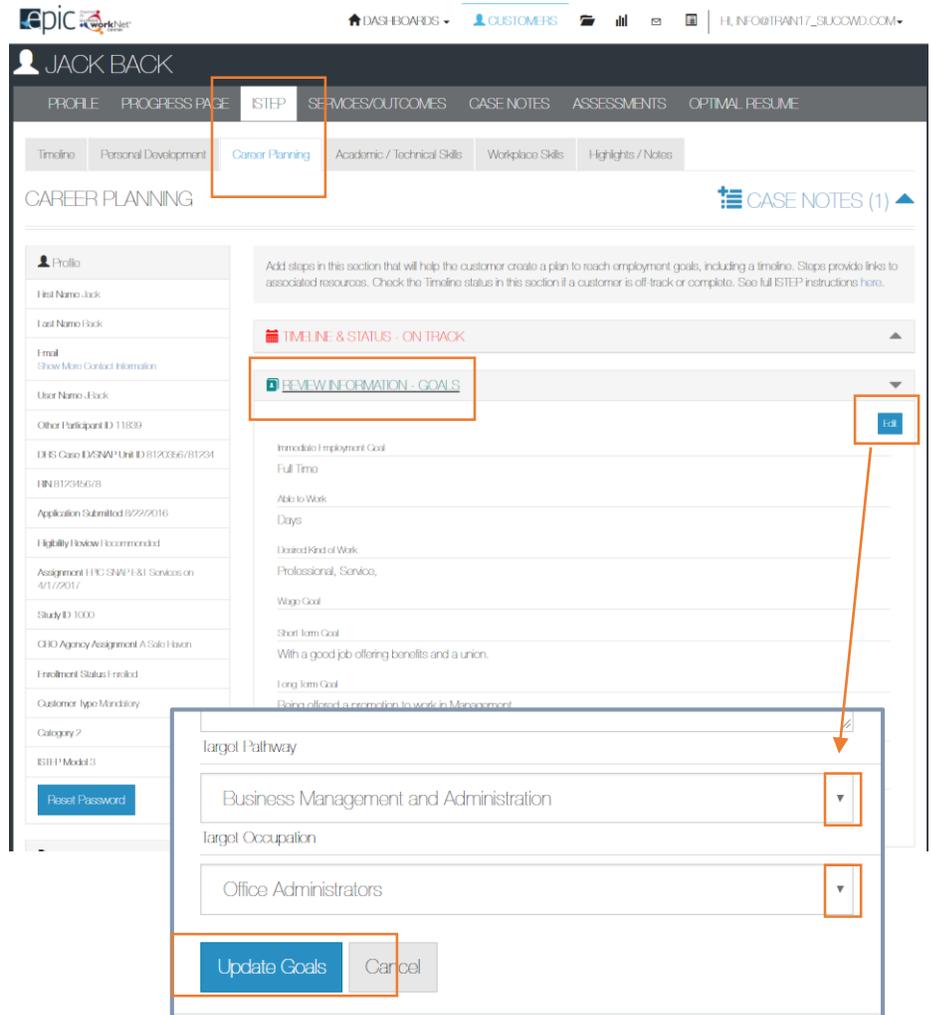
Select Edit.

Scroll down.

Click the drop-down arrow in the Target Pathway Section to select the customer’s targeted career pathway based on training program selected.

Click the drop-down arrow in the Target Occupation Section to select the customer’s targeted occupation based on the Target Pathway just selected in the step above.

Click “Update” to save the selections.



The screenshot displays the ISTEP web application interface for a customer named JACK BACK. The 'Career Planning' tab is selected. The 'REVIEW INFORMATION - GOALS' section is expanded, showing a list of goals. A modal window is open, allowing selection of a 'Target Pathway' (Business Management and Administration) and a 'Target Occupation' (Office Administrators). The 'Update Goals' button is highlighted.

## Entering/Editing Steps

### Notes:

- Once a (co-enrolled) customer is in IWDS and their application has been certified, services that are identified with a start date (on or after the IWDS application certification date) with a status that is open/completed, will automatically populate IWDS.
- Steps can be entered in more than once. For example, you work with a customer to complete a resume during training and then work with them to update their resume after training.

**Service Provider for This Step** – Enter or edit information for the school or organization that will be providing the services. This will include the schedule and associated hours.

**Dollar Value of This Service (Optional)** – Add the amount/value of the service provided.

**Earned Credentials for this Step** – Added when indicating a Successful Completion, Earned a Credential, and the information is completed.

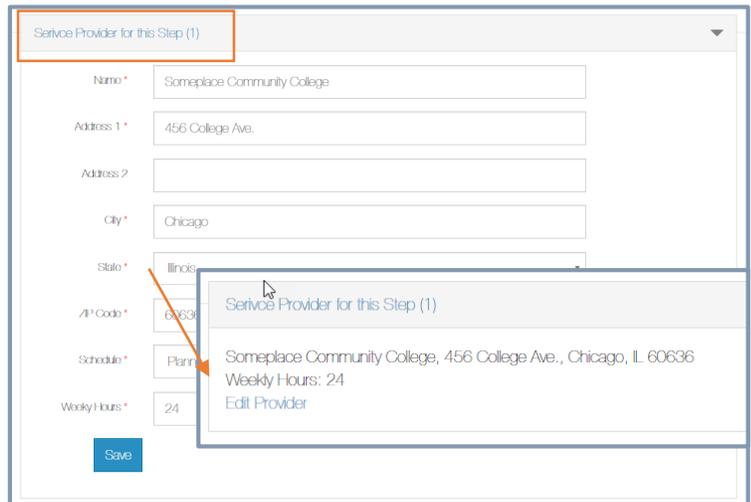
**Status and Notes** – Includes the following information:

**Set the Status** – Not Started (Scheduled), Open, Successful Completion, Unsuccessful Completion, or Deleted.

**Start Date** – Earliest start date, from the steps in this section, will populate the timeline area.

**Due Date** – Latest due date, from the steps in this section, will populate the timeline area.

**Notes** – Visible to the customer when they hover over the icon.

Dollar Value of this Service (Optional)

Dollar Value of Service \*

Number of Times Offered At This Cost \*

Save

Dollar Value	Number of Times Service Was Offered at this Cost	Total Cost
		Total Cost: \$0

The dollar value information is optional. It is useful though – to track what you are spending on each customer. If you enter the information here, the value will still need to be added to any fiscal documents separately.

Status and Notes

Status \* Started/Open

Start Date 11/6/2017

Due Date

Notes

Save

Status \*

- Started/Open
- Not Started (Scheduled)
- Started/Open
- Successful Completion
- Deleted
- Unsuccessful Completion

Each step has a status that needs to be updated to show the customer's progress. Once a customer begins a step, mark "Started/Open" and the appropriate dates. Add any notes.

Upon further activity, mark one of the other statuses and the appropriate dates.

Earned Credentials for this Step (0)

Add New Credential

Earned Credentials for this Step (0)

Add New Credential

Credential Source \* Copy of Credential

Credential Type \* H.S. Diploma/Equivalency/G.E.D.

Date Attained \*

Institution \*

Credential Description \*

Save

Credential Source \*

- Copy of Credential
- Copy of Credential
- Copy of Diploma
- Copy of Certificate
- Copy of Degree
- Copy of Graduation List
- Written Verification of Transcript

Credential Type \*

- H.S. Diploma/Equivalency/G.E.D.
- H.S. Diploma/Equivalency/G.E.D.
- A.A. or A.S. Diploma/Degree
- B.A. or B.S. Diploma/Degree
- Occupational Skills License
- Occupational Skills Certificate or Credential
- Other Advanced Educational Degree or Occupational C
- Other

Each step has an option to indicate if a credential(s) was earned.

The credential will automatically be stored in the **Earned Credentials for this Step** section.

You can upload an electronic copy of the credential into the ISTEP.

Add interim credentials as customers earn them. Change them as necessary.

Earned Credentials for this Step (1)

- Occupational Skills Certificate or Credential View/Update

Add New Credential

## Establish Training Plans by Model

These models are approved to use for the EPIC program. The full document may be found in the EPIC Partner Resource Guide – *EPIC Training Models and How to Document the Models*.

Enter and add steps to a customer's Academic/Training plan based upon these parameters:

**Model I:** Bridge program to help individuals with reading and math levels below 8th grade and/or needs English as a Second Language (ESL) training. This prepares them for Model II or III.

- English Language Acquisition (EAL/ESL).
- Reading remediation.
- Math remediation.

**Model II:** Adult education for individuals that need to earn their high school equivalency certification, upgrade their basic skills, earn a community college basic certificate and/or obtain an industry-recognized credential.

- Adult Education only.
- Adult Education plus Career & Technical Education (CTE).
- Adult Education plus Industry Recognized Credential.

**Model III:** Lacking industry related skills or credentials or SNAP participants who have successfully completed Models I and II. Community-based organizations will offer enhanced short-term training opportunities to SNAP recipients in key growth industry areas.

- College Credit (must be a community college or credit-bearing postsecondary that is working with the CBO).
- Industry-Recognized Credential Only (must be an actual industry recognized credential, i.e. AWS – American Welding Society).
- Work Experience Only.

CBOs will use the Individualized Services, Training and Employment Plan (ISTEP) to document the models. CBOs will enter the components as steps in ISTEP and the system will use the combination of data points to determine the EPIC model. **The following steps determine the EPIC Model.**

Step Title	Step Description
Raise your Math and Reading skills to 8.0 through a Bridge program.	<p>Bridge Programs provide basic skill instruction that is combined with:</p> <ul style="list-style-type: none"> <li>• Job knowledge and skills.</li> <li>• Career awareness and development activities.</li> <li>• Services that help you move to the next level of training.</li> </ul> <p>The program does not provide training in a specific job. It does introduce key concepts and industry terms that are built into basic skills instruction.</p>
Improve your English language skills to 8.0 through a Bridge program.	<p><a href="#">English Language Acquisition Programs (ELA/ESL)</a> will teach you to read, write, understand, and speak English more fluently by enhancing your grammar, vocabulary, and communication skills.</p> <p>Bridge Programs provide basic skill instruction that is combined with:</p> <ul style="list-style-type: none"> <li>• Job knowledge and skills.</li> <li>• Career awareness and development activities.</li> <li>• Services that help you move to the next level of training.</li> </ul> <p>The program does not provide training in a specific job. It does introduce key concepts and industry terms that are built into basic skills instruction.</p>
Attend adult education and literacy classes.	<p><a href="#">Adult Education</a> programs will help you get the basic skills you need to be more productive.</p>
Complete EPIC Training Program (CTE/College Credit).	<p>Career &amp; Technical Education (CTE) programs provide work-based academic and technical training. You will earn college credit and get the <a href="#">skills needed to get a job</a>. You will gain the core set of skills to help you succeed if you choose to continue your education and training.</p>
Complete EPIC Training Program (Industry-Recognized Certificate Only).	<p>Work-based technical training programs provide you with the <a href="#">skills</a> and industry-recognized credentials needed to get a job. It does not provide college credit, but you will gain the core set of skills to help you succeed if you choose to continue your education and training.</p>
Complete EPIC Training Program (Work Experience).	<p>Your career navigator will help connect you to an employer related to the career pathway you are pursuing. This is a great opportunity for you to get experience and enhance your <a href="#">workplace/soft skills</a>, and to build your network of job contacts.</p>

Use the following steps to identify which components a customer will be following:

Already In Plan	Title	Description	Type	IWDS Service Name	Result In A Credential	Core	Add
	Improve your English language skills.	English Language Programs (ESL) can teach you to read, write, understand, and speak English more fluently by enhancing your grammar, vocabulary, and communication skills.	Staff Assisted	English Language Proficiency	Yes - Credential is earned upon	No	Add
	Attend adult education and literacy classes.	Adult Education programs can help you get the basic skills you need to be a more productive worker. These programs focus on basic skills such as reading, writing, math, learning English, and problem-solving.	Staff Assisted	Adult Education and Literacy Activities	Credential is earned upon successful completion.		Add
	Raise your Math and Reading skills to 8.0 through a Bridge Program.	<p>Bridge Programs provide basic skill instruction that is combined with:</p> <ul style="list-style-type: none"> <li>job knowledge and skills,</li> <li>career awareness and development activities, and</li> <li>services that help you move to the next level of training.</li> </ul> <p>The program does not provide training in a specific job. It does introduce key concepts and industry terms that are built into basic skills instruction.</p>	Staff Assisted	Remedial Training	Yes - It prepares participants to complete credential assessment.	No	Add
	Improve your English language skills to 8.0 through a Bridge program.	<p>English Language Acquisition Programs (ELA/ESL) will teach you to read, write, understand, and speak English more fluently by enhancing your grammar, vocabulary, and communication skills.</p> <p>Bridge Programs provide basic skill instruction that is combined with:</p> <ul style="list-style-type: none"> <li>job knowledge and skills,</li> <li>career awareness and development activities, and</li> <li>services that help you move to the next level of training.</li> </ul> <p>The program does not provide training in a specific job. It does introduce key concepts and industry terms that are built into basic skills instruction.</p>	Staff Assisted	English Language Proficiency	Yes - It prepares participants to complete credential assessment.	No	Add
	Complete EPIC Training Program (CTE/College Credit)	Career & Technical Education (CTE) programs provide work-based academic and technical training. You will earn college credit and get the skills needed to get a job. You will gain the core set of skills to help you succeed if you choose to continue your education and training.	Staff Assisted	Occupational Classroom Training	Yes - It prepares participants to complete credential assessment.	No	Add
	Complete EPIC Training Program (Industry-Recognized Certificate Only)	Work-based technical training programs provide you with the skills and industry-recognized credential needed to get a job. It does not provide college credit, but you will gain the core set of skills to help you succeed if you choose to continue your education and training.	Staff Assisted		Credential assessment.		Add
	Complete EPIC Training Program (Work Experience)	Your career navigator will help connect you to an employer related to the career pathway you are pursuing. This is great opportunity for you to get work experience and enhance your workplace/soft skills. This is a great opportunity for you to build your network of job contacts.	Staff Assisted	Work-based Learning	Yes - It prepares participants to complete credential assessment.	No	Add

May need to add one of these prior to enrolling in a Bridge program.

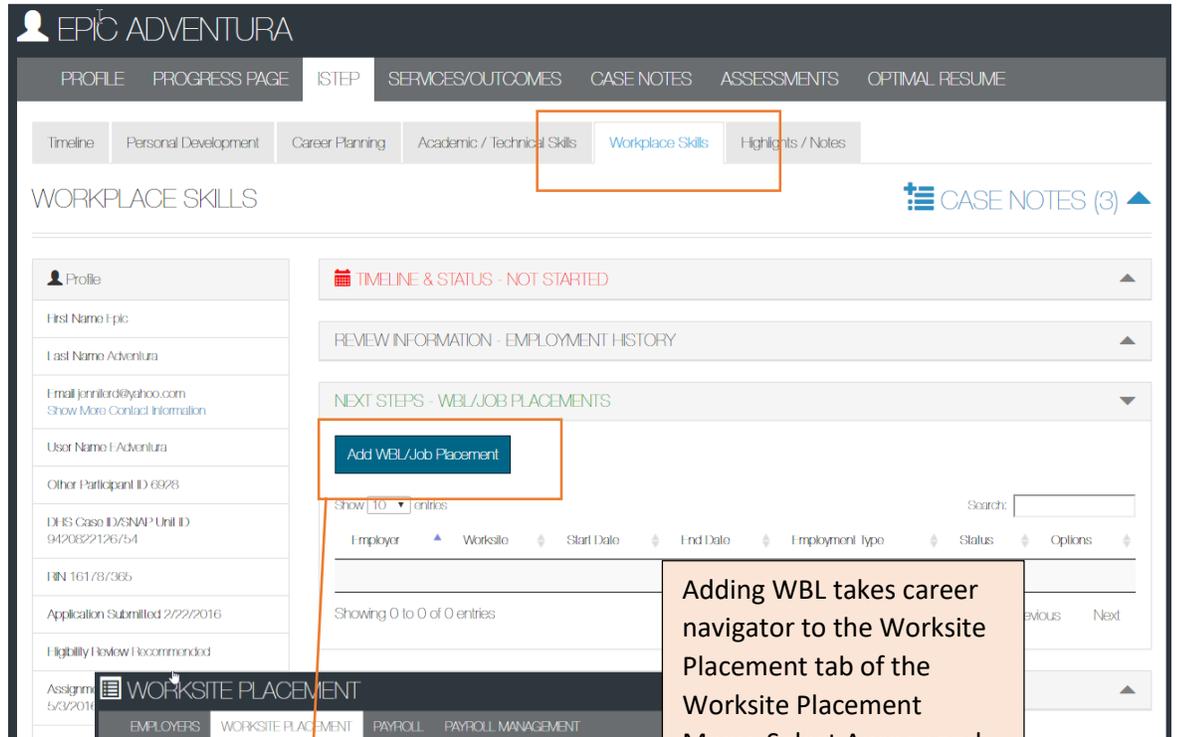
Include one or both of these when customer needs a Bridge program.

Select one or more of these for the EPIC training program options.

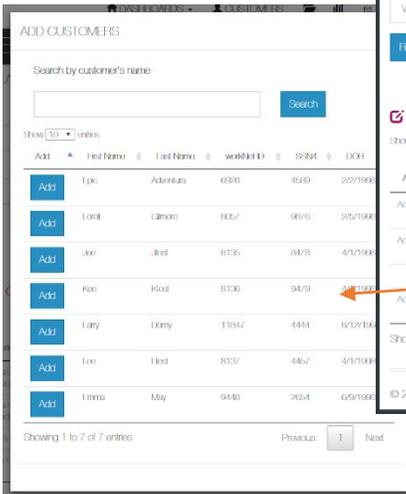
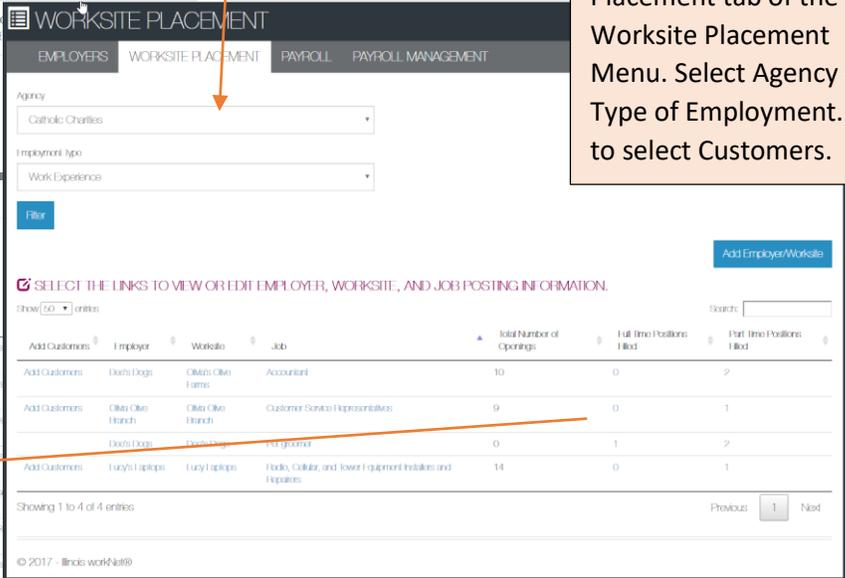
### Add Workplace Skills for Customers

This section allows career navigators to provide the following for customers who participate in work experience:

- Check the timeline and status for Workplace Skills.
- Review and edit the customer's Employment History.
- Add and edit work-based learning and worksite placement activity.
- Review payroll uploaded for the customer.



Adding WBL takes career navigator to the Worksite Placement tab of the Worksite Placement Menu. Select Agency and Type of Employment. Filter to select Customers.

After adding workplace skills learning items and/or payroll for a customer, you can view the items on the workplace skills tab.

**NEXT STEPS - WBL/JOB PLACEMENTS** ▼

Add WBL/Job Placement

Show  entries Search:

Employer	Worksite	Start Date	End Date	Employment Type	Status	Options
Dee's Dogs	Olivia's Olive Farms	4/18/2017	5/18/2017	Work Experience	Started/Open	Details

Showing 1 to 1 of 1 entries Previous  Next

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**PAYROLL UPLOAD HISTORY** ▼

Show  entries Search:

Worksite	Pay Period Start	Pay Period End	Hours Worked	Hourly Wage	Total Wages
Olivia's Olive Farms	4/16/2017	4/22/2017	15.00	\$12.00	\$180.00

Showing 1 to 1 of 1 entries Previous  Next

## Tracking Customer's Progress

The Timeline page for each customer tells an overall story. Some of the information is gathered after the Career Navigator marks a customer as On Track (the default setting), Off Track, Completed, or Not Required. The Personal Development, Career Planning, Academic/Technical Skills, and Workplace Skills sections all have a Timeline section in which to mark the customer progress.

If a customer is progressing as planned, the setting would remain as "On Track." If a customer falls behind on the activities scheduled, the Career

 **TIMELINE & STATUS - ON TRACK**

Section Status ⓘ  On Track  Off Track  Complete  Not Required

Update

Navigator would mark the customer as "Off Track." Once a customer is completed with all assigned steps, the Career Navigator would mark the customer as "Complete." If no steps are needed within a section, the "Not Required" option would be marked.

These items are reflected in the ISTEP Dashboard in the following ways:

- Customers are tracked by each section of the ISTEP with the status and by which steps have been added. The customers, who did not need any of the steps for that section, would be reflected in two lines – Not Required and No Steps Identified. These two numbers should match.
- Steps added to the customer’s ISTEP are reflected in the appropriate section of the ISTEP Dashboard.
- Career Planning steps, which are staff assisted, can be revealed by clicking the Show/Hide button in that section. They include:
  - Diagnostic Testing
  - Career Planning
  - Paid Work Experience
  - Self-Directed Job Search
  - Follow-up Services
- Academic/Technical Skills steps can be revealed by clicking the Show/Hide button in that section. They include:
  - Remedial Training
  - Adult Education & Literacy
  - English Language Proficiency
  - Work-based Learning
  - Occupational Classroom Training
- Work Experience/Training status and steps are all listed on the ISTEP Dashboard.

**Steps completed by customers, which are marked appropriately, impact the Benchmark Report for an agency.**

The category, in which a step falls into on the ISTEP Dashboard, is determined by the IWDS Service Name associated within a step.

Section	Count	%
<b>Personal Development</b>		
Status		
On Track	82	88%
Off Track <span style="color: red;">▲</span>	1	1%
Complete	9	10%
Not Required	1	1%
Steps/Services		
No Steps Identified	76	81%
Steps Identified (Unduplicated Count)	18	19%
Self Service Steps	17	100%
Steps/Services		
No Steps Identified	48	51%
Steps Identified (Unduplicated Count)	47	49%
Self Service Steps	15	14%
Staff Assisted Steps	46	42%
<a href="#">Show/Hide Steps</a>		
Credentials Earned	0	0%
Subtotal		

[Show/Hide Steps](#)

Diagnostic Testing	8	17%
Career Planning	17	37%
Paid Work Experience	1	2%
Self-Directed Job Search	4	9%
Follow-Up Services	0	0%

**Career Planning Steps**

[Show/Hide Steps](#)

Remedial Training	3
Adult Education & Literacy	0
English Language Proficiency	13
Work-based Learning	3
Occupational Classroom Training	9

**Academic/Technical Steps**

Title	Description	Type	MDS Service Name	Result In A Credential	Core	Add
Explore jobs, required skill/credentials, and wage information.	Look at occupation job information for careers that may be a good match with your interests. Compare the jobs.	Staff Assisted	Career Planning	No	No	<input type="button" value="Add"/>

Services and Credentials that are entered through the ISTEP or IWDS are recorded in the Services/Notes/Reminders section.

PROFILE
PROGRESS PAGE
ISTEP
SERVICES/OUTCOMES
CASE NOTES
ASSESSMENTS
OPTIMAL RESUME

## SERVICES

**Profile**

First Name Bally

Last Name Hoop

Email b3oop@esl.com  
Show More Contact Information

User Name b3oop

Other Participant ID 11841

DHS Case ID/SNAP Unit ID  
821498/619116

BIN 821499/61

Application Submitted 8/22/2016

Eligibility Review Recommended

Assignment EPIC-SNAP-E&T Services on  
8/22/2016

Study ID 1000

### LIST OF SERVICES

Show  entries Search:

Associated Step	Service type	Activity type	Status	Start Date	End Date
<a href="#">View Step</a>	Basic Career-Self Service	Support Service Information/Referral	Open	1/31/2017	
<a href="#">View Step</a>	Career Service	Career Planning	Open	1/31/2017	

Showing 1 to 2 of 2 entries Previous  Next

### LIST OF CREDENTIALS

Show  entries Search:

Associated Step	Credential type	Date Attained	Description	Institution	View/Update
No data available in table					

Showing 0 to 0 of 0 entries Previous Next

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