Contents

Overview

Purpose

The Career Plan tool is used by career planners while working with customers to:

- Review Assessment Results
- Create goals based on Assessment Results
- Identify steps/services needed to achieve those goals
- Document the status and flag when interview is needed

Highlights:

- The career planner reviews information and identifies recommended next steps that include start/end dates, status, nots, associated costs, and earned credentials (when applicable upon successful completion of the credential).
- The career planner adds recommended steps/services by selecting from a list of steps/services.

Who Enters/Maintains Data

Only staff and customers with access to the program can view the Career Plan.

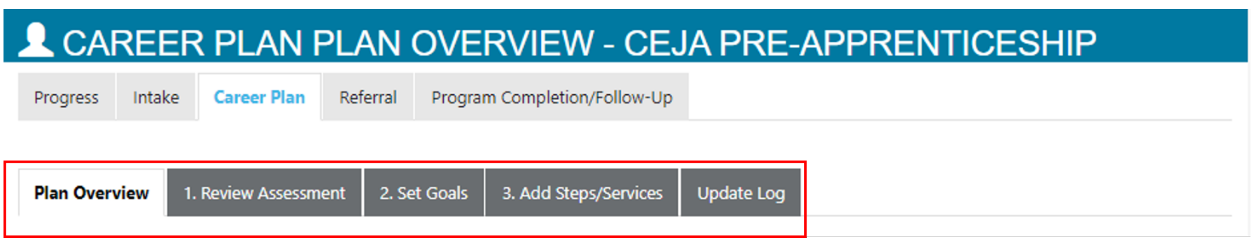
- Statewide User Roles – Statewide staff view/edit Career Plans for all customers.
- Navigators/Grantees – Staff view/edit Career Plans for customers in their region/office.
- Customers – Customers access their information from program tools located in My Dashboard.

Access Climate Works Customer Plan Overview Page

1. Go to illinoisworknet.com and login to your partner account
2. Go to My Dashboard
3. Select the Customer Support Center/IWIS icon in the Partner Tools section
4. Select Climate Works Project Group
5. Select a customer, then select the Career Plan tab

How is the Career Plan Organized?

The Main Career Plan Navigation



Plan Overview – provides a summary view of assessments, career goals, accomplishments, and steps related to goals.

1. Review Assessment – provides assessment results saved in Illinois workNet and an area to write a summary of the assessment results.

2. Set Goals – provides an area to add goals to the Career Plan. Categorize them as short/long-term goals, identify the type of goal, and set the status.

3. Add Steps/Services – provides an area to add services related to each goal. All services include the related goal, status, start date, weekly hours, and notes. A completion date is required if the status is complete.

Update Log – provides a log of Career Plan updates and uploads for customer Career Plan agreements.

Career Plan Sections

Plan Overview

Case Notes allow career planners to enter case notes to document changes, updates, and other notes.

Profile provides:

- Summary of customer information
- Message button

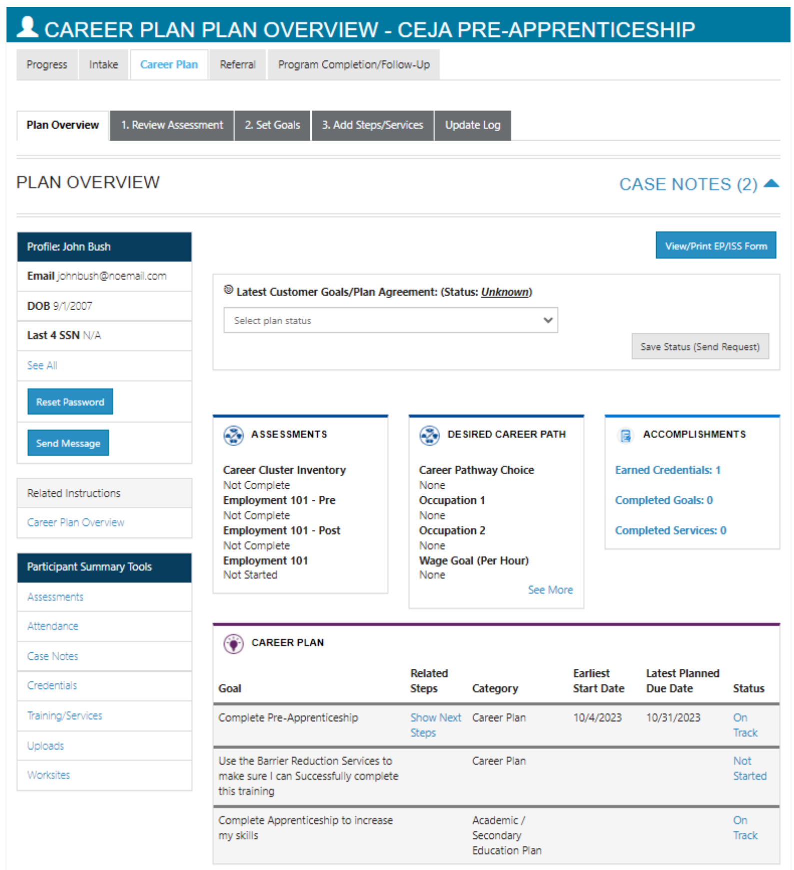
- Reset Password button

Instructions link to the Creating a Career Plan instructions.

Participant Summary Tools provide quick access to:

- Assessments
- Case Notes
- Upload Tool
- Worksite Information

Latest Customer Goal/Plan Agreement – This section provides evidence that the customer participated in the development of their Career Plan.



- Physical Signature – Use the View/Print IEP/ISS Form button to have the customer and career planner sign the bottom of the document. Then upload the agreement using the Uploads tool. You will finish the physical signature process by selecting the status that reflects a signature was collected, and documentation was uploaded/on file.
- Electronic Signature – Use the Send Electronic Request for Customer Agreement option to send a customer the electronic version of their IEP/ISS to digitally sign. The customer will receive an email and an Illinois workNet Dashboard Message with instructions on how to sign the document. Once the document is signed, the customer's account will update to reflect such. You will finish the electronic signature process by updating the Latest Customer Goals/Plan Agreement to the status that reflects a signature was collected and documentation was uploaded/on file.
- Unable to Collect Signature – Use the Unable to Get Customer Agreement on File option.

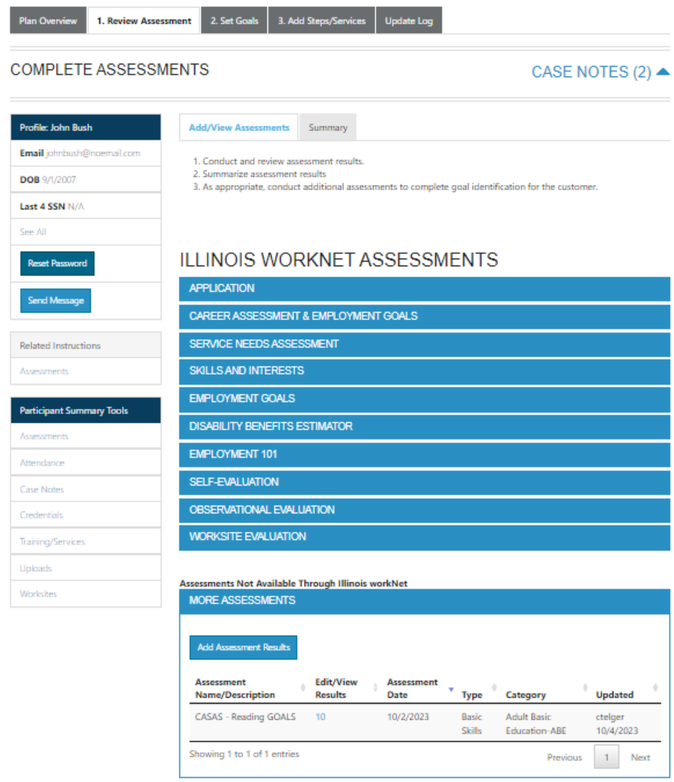
Assessments view a high level of completed assessments. Select See More to go to the assessment page.

Desired Career Path is part of the Employment Goal assessment. This information can be updated any time. Select See More to go directly to the Employment Goals assessment section.

Accomplishments provide a quick count of earned credentials, completed goals, and completed services that link to a list of those items.

The Career Plan section is organized by goals. It includes a list of the steps/services associated with each goal. The start and end dates for goals are automatically generated by the steps/services of that goal. Goal status is set by the career planner and is used to identify not started, on track, off track, or complete.

Review Assessment



It is important to complete assessments to identify customer skills, interests, goals, and barriers.

1. Go through each of the assessment sections.
2. Add an Assessment Summary. Saved assessment summaries are available in the Assessment Summary tab.

Set Goals

Goals should be written to address barriers, employment goals, education/training, and related stackable credentials that can be earned to advance the customer through their career pathway. Goals should be realistic, measurable, and attainable. **Note**: For Climate Works, these goals will be pre-populated, but they can be edited by selecting the button "Edit". Additionally, required training and career services in the program will also populate within the goals.

Use completed assessments as a resource to discuss and develop goals with your customer. The customer needs to agree to the overall initial plan. If customer goals are added or marked as off track, the customer will need to agree to the update.

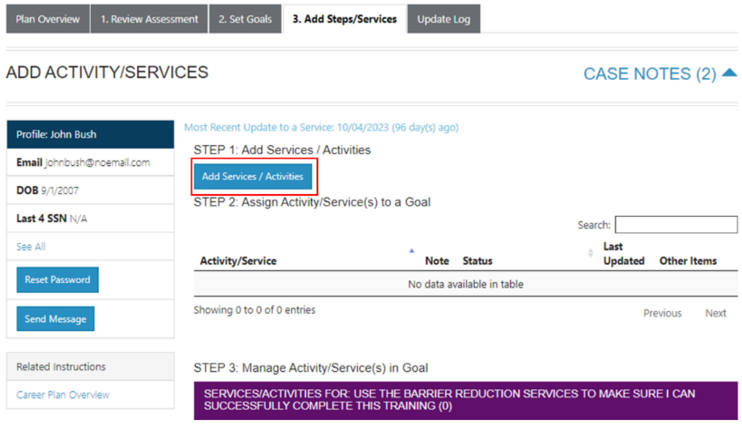
1. Select the Set Goals tab and Add Goal Statement.
2. Enter a Goal Statement that is 144 characters or less.
3. Select a Category.
4. Identify if the goal is Short-Term or Long-Term.
5. Set Goal Status.

Goal	Related Steps	Category	Earliest Start Date	Planned Due Date	Status
Complete training program	Hide Next Steps	Education/Training Plan	11/29/2023	12/29/2023	On Track
	Employability skills/Job Readiness Training		11/29/2023	12/29/2023	Started/Open
	OSHA 10 - Short-term Prevocational Services				Planned/Not Started (Scheduled)
	Pre-apprenticeship Construction Training				Planned/Not Started (Scheduled)
	Clean energy basics				Planned/Not Started (Scheduled)
	Initial Career Assessment of Skill Levels and Other Needs				Planned/Not Started (Scheduled)
	Vocational Exploration (Career Awareness)				Planned/Not Started (Scheduled)
	Development of an IEP				Planned/Not Started (Scheduled)
Get a job		Career Plan			Not Started
Get into a registered apprenticeship program		Career Plan			Not Started
Complete financial literacy		Education/Training Plan			Not Started

- Not Started = This status is the default setting. The career planner should update when the customer started working towards this goal. Goals with a status of “Not Started” automatically update to “Started” when the related service has started.
- On Track = The customer is continuing to progress through the steps in this section of the plan at an acceptable rate.
- Off Track = The customer is not progressing through the steps in this section of the plan at an acceptable rate. A notification is sent to the customer informing them that their status was set to ‘off-track’, and the career planner would like to work with them to help them get back on track.
- Complete = The career planner verified the customer completed this section of the plan.

Add Steps/Services

Start adding planned Steps/Services for the customer to reach their goals.



1. Select Add Step/Service. A modal will open with services to select from. Click Add next to each step to add to this customer's Career Plan.
2. Edit Planned Services – Click the pencil icon to update the service. **All Services** include the related goal, status, start date, weekly hours, and notes. A completion date is required if the status is complete.
    a. **Work Experience Services** require worksite information to be entered into Worksite Placement. The additional fields are related to worksite placement, attendance, and credentials earned.
    b. **Support & Barrier Reduction Services** include fields that collect support type and related cost information.
    c. **Career & Training Services** include service provider information, attendance, and credentials earned while completing the service.
    d. **Apprenticeship Services** require SOC Code, RAPIDS ID, provider information, attendance, and credentials earned while completing the service.

Service/Step Level Information (Not Worksite Placements)

Status

All services include the related goal, status, start date, weekly hours, notes, and related barriers. A completion date is required if the status is complete.

Service Provider

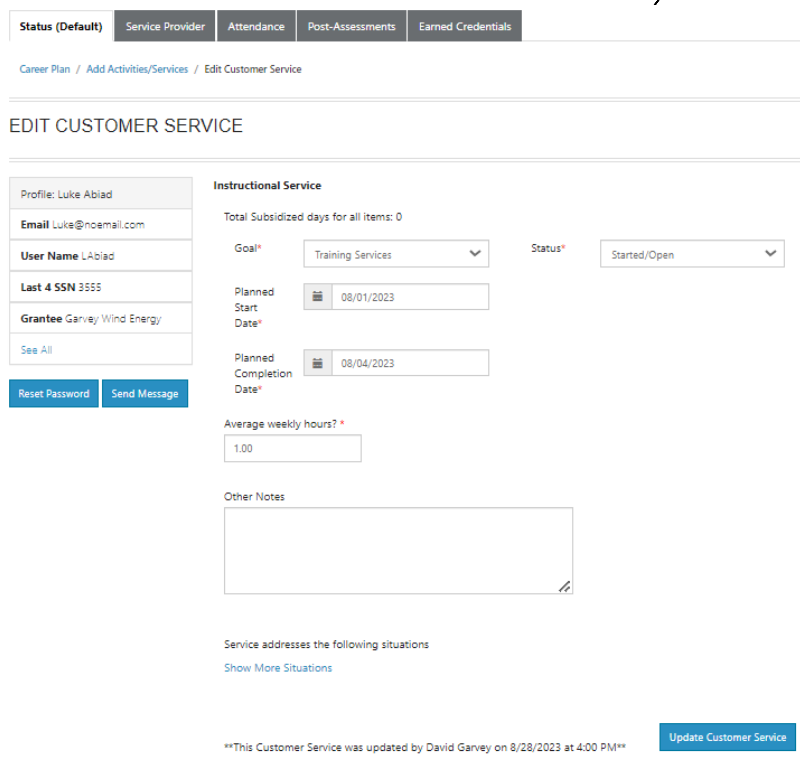
Identify who is providing the service. The grantee is the default provider. If the grantee is not providing the service, enter the provider information.

Dollar Value (Not Required)

Enter the dollar amount related to the service. For example, if transportation, bus pass, or gas card was provided, you can add it to this service.

Earned Credentials

A listing of credentials earned by a customer during their participation in the program will be displayed. You will be able to associate the credential(s) identified with the training program when it was entered into the system. If you do not see the correct credential, check if you associated the correct training program with the service and that the credential was entered into the system and approved for the training program under your provider information.



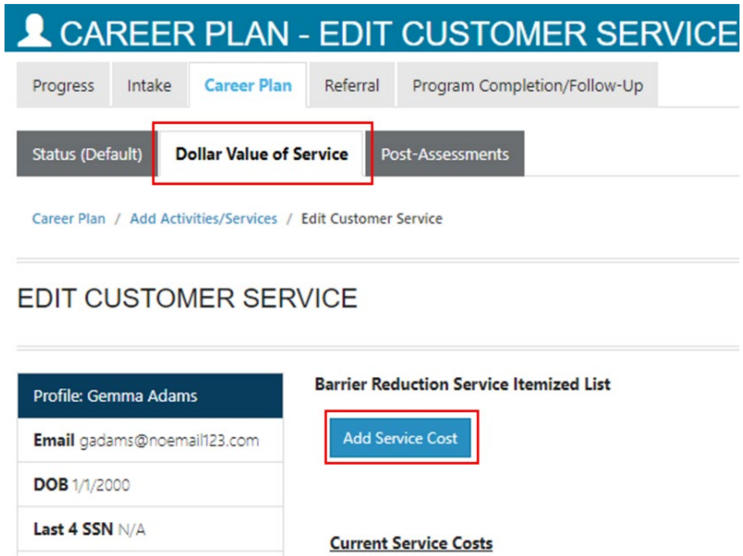
Service Provider

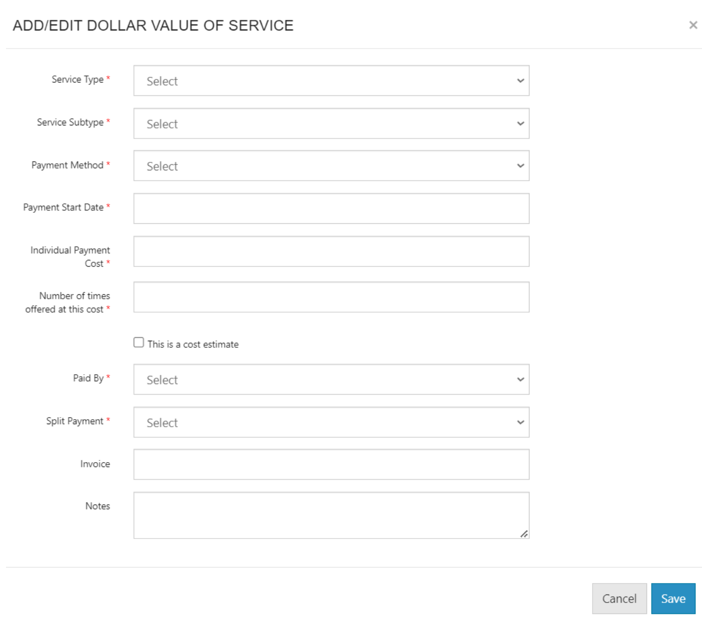
The grantee will be the default provider.

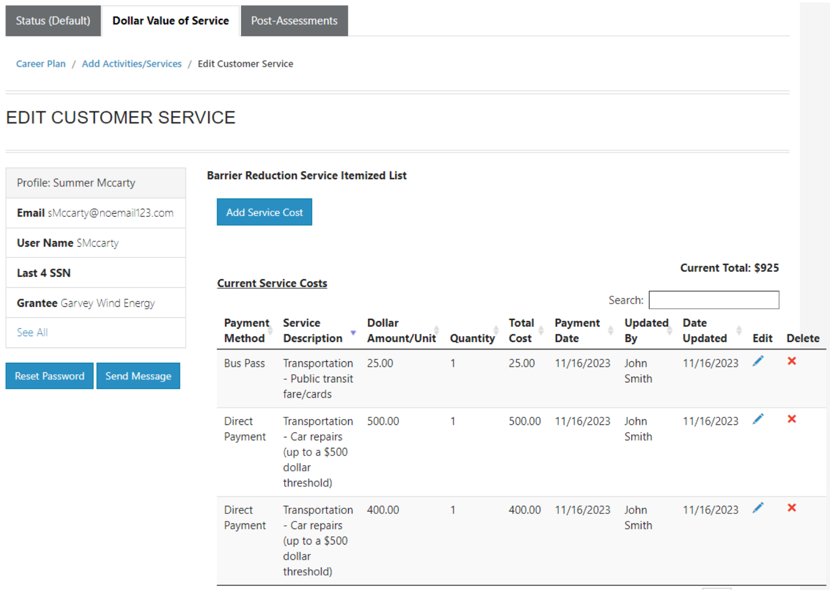
Dollar Value (Required for Barrier Reduction/Support Services)

Enter the dollar amount related to the service. Do not use this as a payroll upload. Those costs should be added via Payroll Upload. A potential future enhancement could pull in payroll uploads to this section.

1. When editing a Barrier Reduction/Support Service click the pencil icon to edit the service
2. Select the tab for Dollar Value of Service
3. On this tab you will enter the cost by selecting the Add Service Cost button (**Note**: you can enter multiple costs to one Barrier Reduction/Support Service, i.e. you are not required to add one service for one cost.)
4. Enter in the information for the cost for all required fields and then click the Save button.
5. The cost information will then be entered into the table for that service. It will also show up on the customer's Progress tab.


CAREER PLAN - EDIT CUSTOMER SERVICE
Progress
Intake
Career Plan
Referral
Program Completion/Follow-Up
Status (Default)
Dollar Value of Service
Post-Assessments
Career Plan / Add Activities/Services / Edit Customer Service
EDIT CUSTOMER SERVICE
Profile: Gemma Adams
Email gadams@noemail123.com
DOB 1/1/2000
Last 4 SSN N/A
Barrier Reduction Service Itemized List
Add Service Cost
Current Service Costs


ADD/EDIT DOLLAR VALUE OF SERVICE
×
Service Type *
Select
Service Subtype *
Select
Payment Method *
Select
Payment Start Date *
Individual Payment Cost *
Number of times offered at this cost *
This is a cost estimate
Paid By *
Select
Split Payment *
Select
Invoice
Notes
Cancel
Save



Status (Default) | Dollar Value of Service | Post-Assessments

Career Plan / Add Activities/Services / Edit Customer Service

EDIT CUSTOMER SERVICE

Profile: Summer Mccarty
Email sMccarty@noemail123.com
User Name SMccarty
Last 4 SSN
Grantee Garvey Wind Energy
See All

Reset Password | Send Message

Barrier Reduction Service Itemized List

Add Service Cost

Current Total: $925

Current Service Costs

Search:

Payment Method	Service Description	Dollar Amount/Unit	Quantity	Total Cost	Payment Date	Updated By	Date Updated	Edit	Delete
Bus Pass	Transportation - Public transit fare/cards	25.00	1	25.00	11/16/2023	John Smith	11/16/2023		
Direct Payment	Transportation - Car repairs (up to a $500 dollar threshold)	500.00	1	500.00	11/16/2023	John Smith	11/16/2023		
Direct Payment	Transportation - Car repairs (up to a $500 dollar threshold)	400.00	1	400.00	11/16/2023	John Smith	11/16/2023		

Earned Credentials

Earned Credentials show a listing of the credentials a customer earned during their participation in the program. You will be able to associate the credential(s) identified with the training program when it was entered into the system. If you do not see the correct credential, make sure you associate the correct training program to the service and that the credential was entered in and approved for the training program under your provider information.