Intake Assessments

June 2024 v2

Purpose:
On the intake screen, grantees have access to their designated organizations' customer information and related program applications, career assessments, service needs assessments, enrollment status, participant summary information, and resources.

Who Enters/Maintains Data

- Grantees enter and update customer program intake information.

Access Participant Details

1. Log into www.illinoisworknet.com.
2. Select My Dashboard.
3. Select Customer Support Center under Partner Tools.
4. Select Groups in the top menu.
5. Select the group CEJA/FEJA Programs.
6. On the customer list page, Service Providers can add intake information for each customer within the program.

Start Intake Process

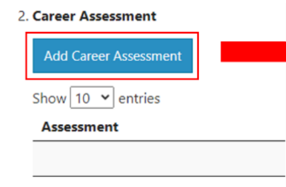
1. Use the following search fields to narrow results to a specific subset of customers.
2. Select the Last Name of the customer to access customer-level details.
3. Click on the Intake tab located at the top of the menu

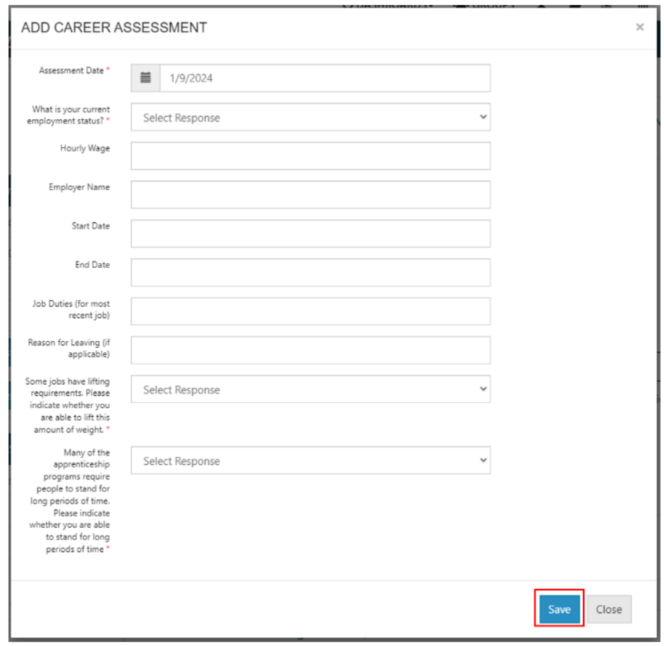
Complete Application

1. Click the Complete Application with Customer button.
2. The application will be prepopulated with information from the prescreening. Confirm the information is correct and complete the remaining application fields. Save the information and go to the next page.
3. The system will complete an eligibility check. If information was incorrectly added to the system, go back to the demographic information section and make updates.
4. If the customer is eligible, select the applicable program. The application summary page will show. Click the button at the bottom of the page to return to the Intake page.
5. If the customer is not eligible, you can direct them to self access resources in Illinois workNet or their local Illinois workNet Center/American Job's Center.
6. If the customer needs initial barrier reduction assistance to complete the intake process, select the checkbox and enter a case note to document distributing the funds.

Add Career Assessment

1. Click on the button to Add a Career Assessment
2. Answer the following questions with the customers' information:
    a. Assessment Date
    b. What is your current employment status?
    c. Hourly wage
    d. Employer name
    e. Start Date
    f. End Date
    g. Job Duties (for most recent job)
    h. Reason for Leaving (if applicable)
    i. Some jobs have lifting requirements. Please indicate whether you are able to lift this amount of weight.
    j. Many of the apprenticeship programs require people to stand for long periods of time. Please indicate whether you are able to stand for long periods of time.
    k. Primary Goal
    l. Secondary Goal
    m. If career goals are related to construction, is there a specific trade(s) you're interested in pursuing? (Select at least one)





3. Click the Save button to save results.

Note: You can enter more than one career assessment if need be.

Add Service Needs Assessment

1. Click the button Service Needs Assessment
2. Enter answers for the following service needs areas:
    a. Accommodations and Student Services
    b. Technology Assistance for Virtual Learning
    c. Transportation
    d. Childcare/Family Member Care
    e. Assistance with Housing
    f. Food
    g. Healthcare
    h. Legal Assistance
    i. Financial Literacy

   j. Mentorship
   k. Application Fees
   l. Other Support Services
3. Click the Save button at the bottom of the screen to save the results. If the services or referrals are needed, those will be listed on the customer's progress page. As those services are provided, the system will indicate they are "good" or have been addressed.

Note: You can enter more than one service needs assessment. The most recent assessment will determine what is needed barrier reduction services/referrals are populated on the progress page.

NOTE: Navigators only have access to customer information up to this point.

Enter Customer Status

1. Customer Status will be generated by the system based on the customer's progress in the system:
   a. Prescreening – application not complete.
   b. Applicant – if eligible/application complete.
   c. Not Enrolled – Not Eligible – not eligible based on prescreening/application.
   d. Not Enrolled – Declined to Participate – if the checkbox is selected on the intake tab.
   e. Enrolled – when the first service has a started status.
   f. Withdrawal – The customer has withdrawn from the program.
   g. Complete – The customer has completed all training modules.
   h. Exited with follow-up – all services are marked as complete or withdrawn. Additional services cannot be added to the system.
   i. Exited with no follow-up – The customer has completed all training and services and follow-up is no longer required.

Training & Services/Career Plan

1. Before proceeding to the Training & Services/Career Plan, read the instructions
2. Click on the check box to confirm you have provided the participant instructions on the features and how to navigate their career plan
3. Click on the Go to the Customer's Training & Services/Career Plan button

Note: For more details on how to navigate the Training Services screen, refer to the Training/Services Instructions Guide.

5. **Use Customer's Training & Services/Career Plan to:**
    1. **Use Customer's Career Plan to:**
        1. Discuss initial application responses saved in the career plan and add a summary to the plan.
        2. Discuss goals based on the customer's current situation and where they want to be. Add goals to the plan.
        3. Discuss steps/services that can help them reach their goals. Add the steps/services and related information to the plan.
        4. Make sure the customer agrees to the plan. If not, make adjustments so they are on-board with the plan.
        5. Have the customer sign the plan either electronically (paper copy is not needed) or physically (paper copy is needed).
    2. **Make sure the customer knows how to view their plan online through their Illinois workNet account.**
        1. They should know the plan is a communication tool and they should review and ask for any adjustments to the plan.
        2. Let them know they may be asked to electronically sign the career plan if changes are made.
        3. Let them know they can see a history of updates to their plan
        4. Let them know there are other resources in the plan that can help them update their resume and find a job.
    3. **Update the plan as needed**
        1. Add case notes.
        2. Update steps/services as they are started, updated, and completed.
        3. Have the customer electronically sign their career plan as needed.

☐ have provided the customer with features and how to access their career plan.

Go to the Customer's Training & Services/Career Plan