

## Contents

Overview .....	1
Career Plan.....	1
Plan Overview .....	2
The tab consists of: .....	2
Review Assessment.....	3
Set Goals .....	4
Add Steps/Services.....	5
Tab 1 – Status (Default).....	5
Tab 2 – Service Provider.....	6
Tab 3 - Dollar Value of Service .....	6
Earned Credentials.....	7

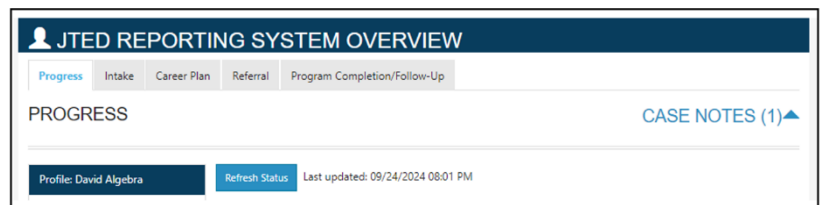
## Overview

The Career Plan tool is used by career planners while working with customers to review assessment results, create goals based on assessment results, and document the status and flag when intervention is needed.

The career planner reviews information and identifies recommended next steps that include start/end dates, status, notes, 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.

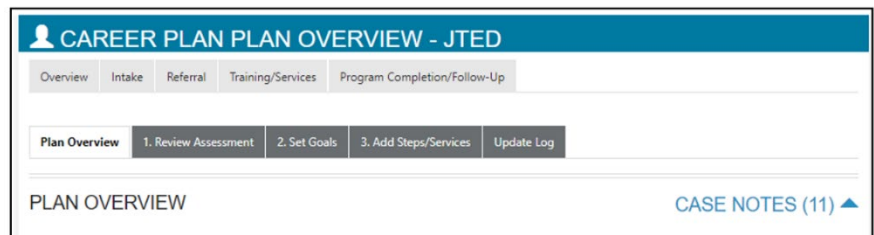
1. Log into [www.IllinoisworkNet.com](http://www.IllinoisworkNet.com)
2. Select **My Dashboard**
3. Select **Customer Support Center/IWIS** in the partner tools section
4. Select **JTED Project Group**
5. Select a **customer**
6. Select the **Career Plan** tab



## Career Plan

The Career Plan consists of the following tabs:

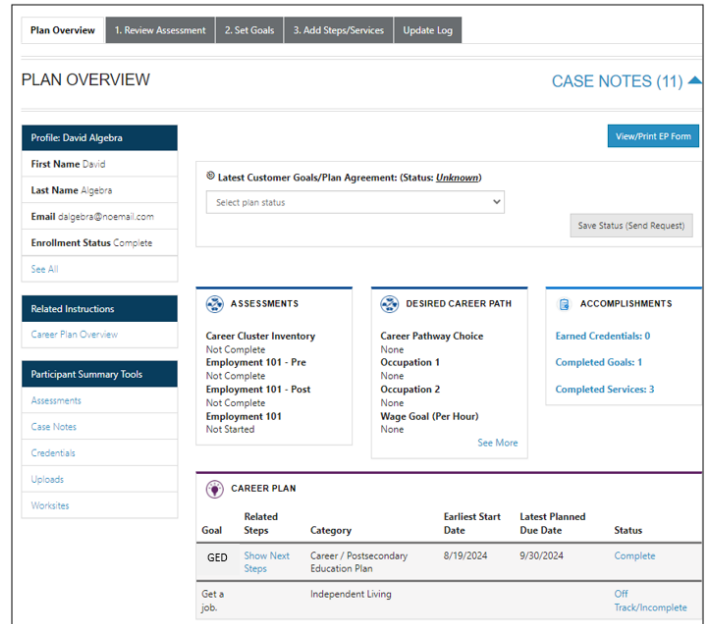
- Plan Overview
- Review Assessment
- Set Goals
- Add Steps/Services
- Update Log



## Plan Overview

The Plan Overview tab provides a summary view of assessments, career goals, accomplishments, and steps related to goals. The tab consists of:

- **Case Notes**
  - Allow career planners to enter notes to document changes, updates, and other notes.
- **Latest Customer Goals/Plan Agreement**
  - Provides evidence that the customer participated in the development of their Career Plan.
- **Assessments**
  - Provide a high-level view of completed assessments and statuses.
- **Desired Career Path**
  - Part of the Employment Goal assessment. This information can be updated anytime. 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 items.
- **Career Plan**
  - 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.
- **Signature**
  - 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.



Goal	Related Steps	Category	Earliest Start Date	Latest Planned Due Date	Status
GED	<a href="#">Show Next Steps</a>	Career / Postsecondary Education Plan	8/19/2024	9/30/2024	Complete
Get a job.		Independent Living			Off Track/Incomplete

## Review Assessment

The Review Assessment tab provides assessment results and an area to document a summary of the assessment results. The tab consists of:

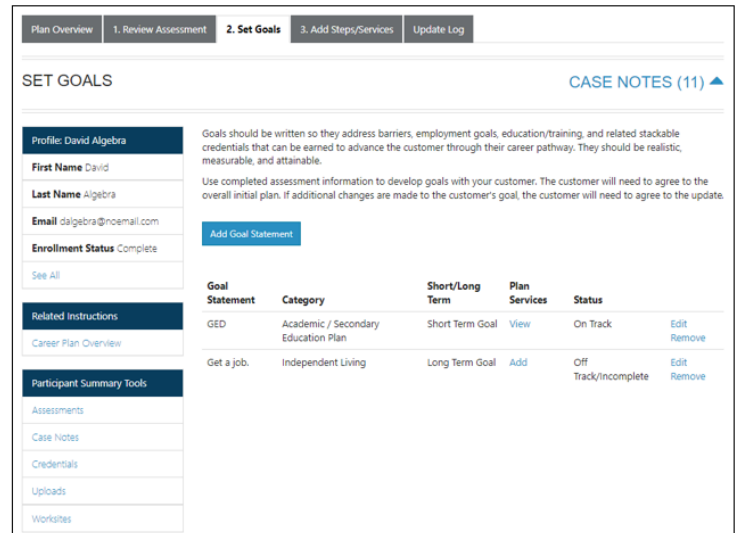
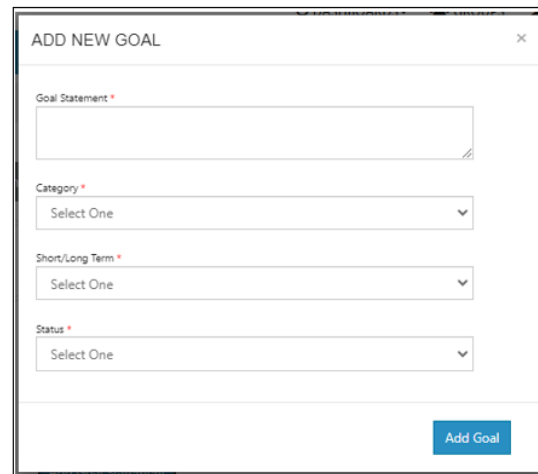
- **Skills and Interests**
  - Find careers that match skills and interests
- **Employment Goals**
  - Career, Occupation, and Wage goals
- **Education Level**
  - Populates from Intake information
- **Employment Related Information**
  - Populates from Intake information
- **Barriers to Employment**
  - Populates from Intake information
- **Disability Benefits Estimator**
  - Estimate disability benefits
- **Employment 101**
  - Employment 101 Guide
  - Employment 101 Assessment results
- **Self-Evaluation**
  - Self-Evaluation Assessment results
- **Observation Evaluation**
  - Observation Evaluation results
- **Worksite Evaluation**
  - Worksite Evaluation results
- **Assessments not available through Illinois workNet**
  - Assessment results for assessments taken outside of Illinois workNet
- **Assessment Summary**
  - An Assessment summary can be created for each of the following areas:
    - Readiness Training
    - Employment
    - Independent Living Skills
    - Physical and Emotional Health
    - Leading Skills

### Set Goals

The Set Goals tab provides an area to add goals to the Career Plan.

To set a goal:

- Click **Add Goal Statement**
- Enter a **Goal Statement**
  - 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 realist, measurable, and attainable.
  - Use completed assessments as a resource to discuss and develop goals with your customer.
  - The customer needs to agree to the overall initial plan.
- Select a **Category**
  - Academic / Secondary Education Plan
  - Assessment
  - Career / Postsecondary Education Plan
  - Career Plan
  - Case Plan
  - Education/Training Plan
  - Independent Living
  - Referral to Services
  - Support Services
- **Short/Long Term Goal**
- **Status**
  - Complete
    - The career planner verified the completed this section of the plan.
  - 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.
  - Off Track/Incomplete
    - 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.
    -
  - On Track
    - The customer is continuing to progress through the steps in this section of the plan at an acceptable rate.

customer

### Add Steps/Services

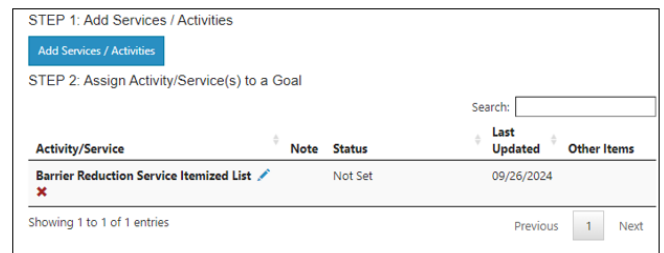
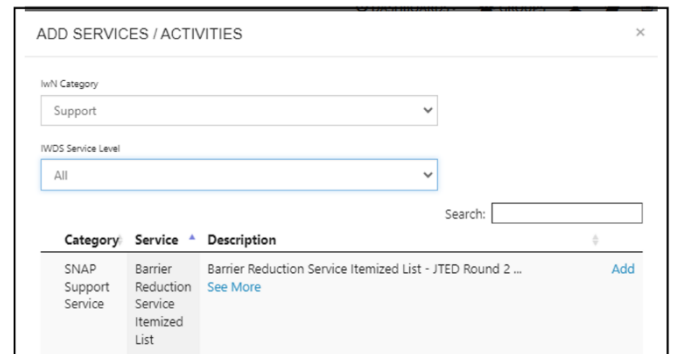
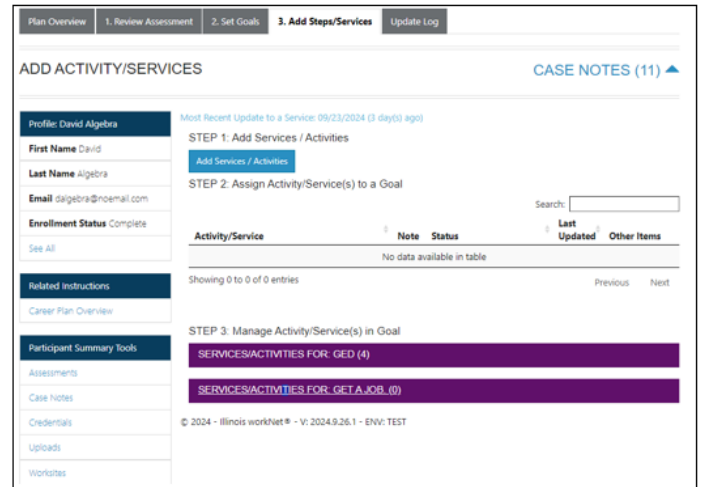
The Add Steps/Services tab provides an area to add services related to each goal. All services include the related goal, status, start date, weekly hours, and note. A completion date is required if the status is complete.

The Add Steps/Services tab has 3 tabs.

#### Tab 1 – Status (Default)

To add steps/services:

- Click **Add Step/Service**
- Select a **Category**
  - Employment
  - Training
  - Support
  - Career / Postsecondary Education Plan
- Select an **IWDS Service Level**
  - Career Services
  - Disaster Recovery Services
  - Supportive Services
  - Training Services
  - Youth Service Element Academic/ Training / Career
- Click **Add** next to each service that needs to be added.
- A message will show at the top of the screen that a service has been added.
- Click the **pencil icon** to edit the service.
  - Select a **Goal**
  - Select a **Planned Start Date**
  - Select **Planned Completion Date**
  - Enter **Average weekly hours**
  - Select a **Status**
  - Enter **Other Notes**

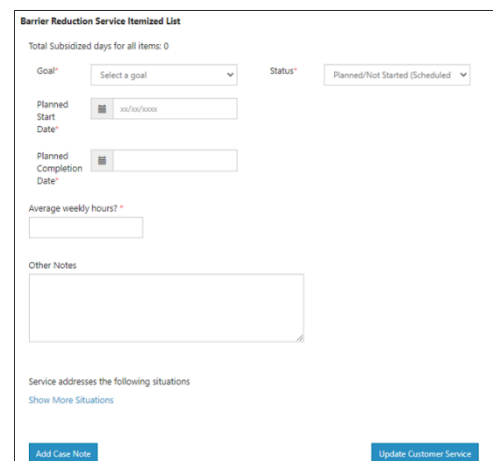


**Work Experience Services** require worksite information to be entered into Worksite Placement. The additional fields are related to worksite placement, attendance, and credentials earned.

**Support & Barrier Reduction Services** include fields that collect support type and related cost information.

**Career & Training Services** include service provider information, attendance, and credentials earned while completing the service.

**Apprenticeship Services** require SOC Code, RAPIDS ID, provider information, attendance, and credentials earned while completing the service.



**Tab 2 – Service Provider**

Identify who is providing the service on the Service Provider tab. The grantee is the default provider.

- If the grantee is not providing the service, click **Other Provider**.
- Enter **Name**
- **Address**
- **City**
- **State**
- **Zip Code**
- **Instructor**
- Click **Update Customer Service**

A **case note** will need to be entered.

- Select **note subject** from the dropdown
- Enter **Contact Date**
- Enter **Subject** of the note
- Enter **Message**
- **Send Case Note As**
- Click **Add Case Note**

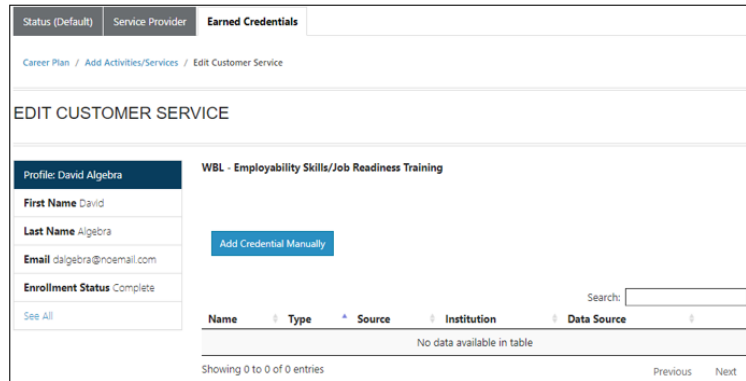
**Tab 3 - Dollar Value of Service**

To enter the dollar amount related to a service, click **Add Service Cost**. For example, if transportation, bus pass, or gas card was provided, you can add it to this service. Do not use this as a payroll upload. Those costs should be added via Payroll Upload.

- Select **Service Type**
- Select **Service Subtype**
- Select **Payment Method**
- Select **Payment Start Date**
- **Individual Payment Cost**
- **Number of times offered at this cost**
- **Cost Estimate (yes or no)**
- **Paid By**
- **The service counts toward the maximum allowed subsidized days for the individual.**
- Click **Save**

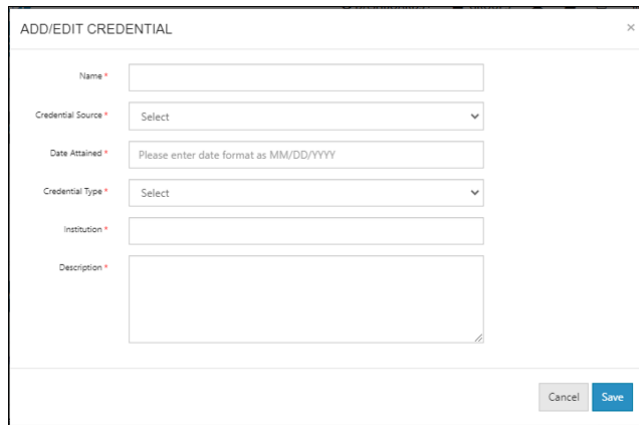
### Earned Credentials

When you edit a Work Based Learning (WBL) Activity, an **Earned Credential** tab will need to be completed. 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.



To add a credential, click **Add Credential Manually**.

- **Enter Name**
- **Credential Source**
- **Date Attained**
- **Credential Type**
- **Institution**
- **Description**



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.

For more information, please refer to the footer at the bottom of any webpage at [illinoisworknet.com](http://illinoisworknet.com).