# IWDS Transition Local Discovery Agenda

## December 19, 2023

**Attendance:**

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| **Area** | **Name** | **Required/Optional** | **Area** | **Name** | **Required/Optional** |
| SIU | Lynette Tritz | Required | LWIA 1 | Ashannti Ross | Required |
| SIU | Olivia Miller | Required | LWIA 1 | Robert Trapp | Optional |
| SIU | Al Menke | Required | LWIA 3 | Dan White | Required |
| SIU | Taylor Littiq | Required | LWIA 3 | Paul Andrews | Optional |
| SIU | Natasha Telger | Required | LWIA 6 | Thaddeus Zychowski | Required |
| DCEO | Mike Baker | Optional | LWIA 6 | Rory Callaghan | Optional |
| DCEO | Michelle Cerutti | Optional | LWIA 6 | Maureen Flynn-Guttosch | Optional |
| DCEO | Kelly Lapetino | Optional | LWIA 7 | Julia Montanez | Required |
| DCEO | Mark Saladino | Optional | LWIA 7 | Kristen Chevali | Optional |
| DCEO | Lisa Jones | Optional | LWIA 11 | Allyson Saxton | Required |
| DCEO | Patti Schnoor | Optional | LWIA 13 | Lori Warren | Required |
| DCEO | Lora Dhom | Optional | LWIA 14 | Crystle Adams | Required |
| DCEO | Julio Rodriguez | Optional | LWIA 14 | Mike Haptonstahl | Optional |
| DCEO | John Barr | Optional | LWIA 17 | Toriana Rhone | Required |
| DCEO | Bryan Ellis | Optional | LWIA 18 | Brian Hensgen | Required |
| DCEO | Mark Burgess | Optional | LWIA 21 | Chris Casey | Required |
| DCEO | Tameka Chism | Optional | LWIA 21 | Dawn Lutz | Optional |
| CC | David Swanson | Optional | LWIA 24 | Monik Patterson | Required |
| CC | Tommy Gee | Optional | LWIA 25 | Stephanie Robinson | Required |
|  |  |  | LWIA 25 | Jordan McBride | Optional |

**Key:**

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| Overview text | Past Notes | Notes from Current meeting | Action Needed - Overdue |

## Agenda

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| Topic | Notes | Due Date & Person Responsible | Attachments |
| Entity & Relationship Management | Agenda:   * Moving from technical terms to personal terms * Touch Points   Notes:  **December 19, 2023**  **What is an entity?**  LWIA 1 – When you put in the agency type, you select the type from the list and it is only put into the system one time. If you need to put in the location, you would give them a relationship number instead of entering the agency again.  LWIA 3 - An entity is to tie any type of service, OJT, etc. An employer could be an entity. The entity would be like a parent and their locations would be offshoots of that. There is an agency type field and the entity role.  LWIA 6 – An entity could be a training service provider, a career service provider, etc.  LWIA 14 – An entity is also important for apprenticeship programs. LWIAs and Subcontractors are also listed as Entities, because a LWIA needs to be a "provider" of record for transportation services and the like.  LWIA 17 & LWIA 25: Do not enter employers as entities, they are entered as a provider.  There can be border training services that are located in a different state. An example is LWIA 3 that borders Wisconsin.  Reciprocal agreements are saying that we’ll accept that state completed their ETPL and can be listed as an Illinois ETPL. They will still need to be entered into the system. Reciprocal agreements just help streamline the process.  An entity is owned by a LWIA but can have locations in other LWIAs. Any LWIA can add a location to an entity, regardless of which LWIA created it.  The view contact page in IWDS needs to be updated to be more intuitive based off of what the LWIAs need.  **When are relationships entered into the system?**  LWIA 14 – when a new provider is entered into the program, they will go ahead and enter the relationship information once all of the information is collected. If they are an existing provider, they will go in an update relationships as needed.  LWIA 7 – Would only have one fund source per relationship. But they can be broken apart by 1A and 1Y.  LWIA 3 - Approved training program needs to be connected to a CIP code. But some areas use them and some don’t. DCEO says they do not need to be entered because it will force a match.  There is no direct correlation between a relationship and a training program.  **How do grants get connected to a relationship?**  The grant process is a complete separate part. It is setting up to tell you which funding source is available for which programs and for what timeframes. The dropdown menu will list every grant that is active during that timeframe for that specific program. | Provide template on how the LWIAs create their customized relationship ID numbers – Due 1/2/2024 |  |
| 12/21/23 Schedule | Agenda:   * Who is available on 12/21/23? * Will decide whether or not to meet   Notes:  Participants responded to let us know who is available on 12/21, will look at responses offline and make a decision.  Will continue discovery meetings in January, schedule TBA |  |  |
| Pre-Enrollment Screening Discussion | Agenda:   * Discuss pre-enrollment screening for 1Y, 1A, and 1D * How does it differ between different programs, which forms are used, what is the current process, etc.   Notes:  **December 14, 2023**  **Pre-enrollment screening:**  LWIA 1: Youth, Adult, and Dislocated worker have the same entry point for enrolled employment and training services which is our online Virtual Information Session where they complete an application (this is the long form). Depending on age, they would be referred either to our Adult career specialist or our Youth career specialist. Would receive a list of required documents and complete certain assessments. This is there we determine eligibility/suitability. The IWDS application is the last step. We have a "Special Request" form where the Business Services team can refer individuals to complete the "long-form" and Special request form is cross referenced before sending customers to a Career Specialist and if they were put on the form that person get rerouted to the Business Services team.  LWIA 6: For Adults and Dislocated Workers, we would do, as others mentioned, an income/expense-financial, self-sufficiency status worksheet, so that we can first determine what immediate financial needs-barriers might be present. Then, we would look at their work history and most recent employment situation to try and get an idea of whether the type of job that they have been doing is still attainable and if there is a decent likelihood of employment in that occupation, and if the wage is sustainable--Essentially, can this person stay in this line of work? or will they have challenges finding, competing for, and obtaining a position in their field. If so, we look at their job search methods they've used thus far, and we determine whether they would most immediately benefit from career services such as job search workshops, resume assistance, interviewing skills, etc. If so, and if the job-seeker/customer wishes to receive those services, we would collect more of the assessment documentation & eligibility, etc.   * Will connect with the main contact who is out this week and will provide pre-enrollment screening information via email. Connect with Thaddeus on specific youth flow.   LWIA 3: Completes long form first and then separates them from 1A, 1Y, or 1D based off of their responses. They then get scheduled for a pre-enrollment session. This is where they complete career interest surveys, BSD screening, TABE/CASAS, etc. They also collect documentation during this session. The customer is told in advance what to bring based off of the long form. Once everything is completed, it is sent to a Career Planner who determines eligibility. Once this is completed, they certify. An Intake staff member starts the IWDS application during the pre-enrollment session. Next step is IEP/ISS.  LWIA 17: Similar to LWIA 1 except we have one intake person that receives all applications and review. That person calls each customer to determine if they are ready for next steps/suitability. They are then scheduled for their TABE and informed them of the required documents they need to submit/other assessments needed. They are then assigned to their career coach who follows up with them from that point to ensure they submit documents, complete assessments, and take then through the enrollment/certification process.  LWIA 21: With us the Pre-App is our go-to. After they come in and we have a conversation with them about their needs, we have them fill out the pre-app if they are needing training, work experience, OJt. If they are in need of help with job searching, resume building, unemployment information, etc... then we take their information with the basic front of the house sign in sheet and enter them into the system with basic information. For the ones that fill out the application, whether they qualify or not the basic personal information is put into they system followed with a case note. Once we determine if they qualify then we do testing and move forward.  LWIA 11: 1. Completes long form (includes interest, skills, financial/digital literacy assessments). 2. collect documentation 3. assigned a career planner 4. Reading/Math assessment if necessary. 5. intake/IEP. They are pre-screened for eligibility after the long form is completed. Application certification is the last step.  LWIA 14: Similar process to LWIA 11 but not every location has a front desk individual to input data. Some forms are sent to offices with receptionists to enter the data in IWDS and then sent back to the starting office for the career planner to review. IWDS 2.0 cannot have multiple tabs opening like how IwN currently works.  **Pros and Cons of the current IWDS System & what would you like in a new system?**  LWIA 6: Like the current function to track referrals but would like to see that expanded and be able to add own referrals. Having a uniform, universal IEP and ISS in the system  LWIA 1: A system that shows the eligibility options for the titles and the career specialist can select which eligibility option aligns with their client than us trying to configure if they are eligible and supporting the eligibility. We should be able to pick the eligibility option and continue to registrant process. Example:  Check the box if your client is Basic Skill Deficient- eligible for 1ALow income and basic skill deficient eligible for 1A and 1Y  If a line of service is opened it will automatically populates within the case note section as well without any additional information(IEP, Case Management, Occupational Skills Training and etc..) Does not allow us to exit until 90 days of case management or employment assistance has been conducted since the last occupational skills training or work experienceA system that does not allow you to exit early, open up a line of service if a case note exceeds 30 days, and etc..If you exit someone positive the system automatically opens up a follow up line for you to input follow services. The career specialist does not need to remember to open up a follow up line.Lets have the system help us be compliant (Leverage the technology to assist our personnel than us trying to manually review)  LWIA 11: Con: Where/how the assessments other than reading/math are entered. It's timely entering the results of our other assessments in the narrative section of the Assessment Summary screen.  LWIA 21: Would like to have access to approved school listing programs on IWDS. Only admin has access.  LWIA 7: Assessments to help build IEP/ISS, would be autopopulated within the IEP and not need to be entered again. Career Connect Assessment is too long, IWDS one is better. LWIA 7 also needs Geo coding. Would be nice to have as much transfer of data to other screens as possible to avoid asking duplicate questions.  LWIA 3: Definitions for the different data point requests. Eligibility triggers (info bubbles linked to ePolicy). This would help prevent mistakes. This feature is currently available in Career Connect and LWIA 7 finds it very helpful. Planned end dates for each service activity that is not same day service activities would be helpful in the service activity entry and then having it show up on the dashboard tasks. Browser access.  **Assessment Scenarios:**   1. An adult interested in training services 2. An adult not interested in training services 3. A youth interested in training services 4. A youth not interested in training services 5. A dislocated worker interested in training services 6. A dislocated worker not interested in training services | Send intake forms used by other delegate agencies that also provide WIOA services. Due by 12/19/23.  Send Assessment Scenarios to SIU staff - Due by 12/19/23.  LWIA 6 to have Thaddeus send bulleted list on specific youth flow. - Completed |  |
| LWIA Customer Intake Forms & IWDS Application | Agenda:   * Review Customer Crosswalk Worksheet & confirm questions used on Intake Forms * What makes someone go from create customer to filling out the WIOA application in IWDS   Notes:  **December 12, 2023**  Comment from:  Lori Warren – Race/Ethnicity & Hispanic or Latino are two separate questions. Folks would like to see this one but for PIRL reporting it is two separate reporting data points.  Paul Andrews – Do we need to look at the race/ethnicity and possibly update this to be more equitable. Note – we will work with the equity committee to address this and align to Federal Reporting Requirements.  Dan White – Would like to understand the ability to eventually have more documentation uploaded and what that looks like as a possibility for the system.  How is it handled if not suitable but certified under training? - They would not be enrolled and could be referred out.   * LWIA 1 - We normally establish suitability prior to certifying someone in IWDS   What does it look like to go back and certify for training.   * Usually identified in the IEP/ISS creation process (done within 45 day window) and they can then complete the training application.   Do any LWIA's not do a pre-enrollment?   * Sometime with DW for Rapid Response or 1N/1E when you know they are going to be eligible. * Some instances where they do that. * Doing some assessments would be good to do as part of pre-enrollment.   Locals will really want the ability to have custom reports that are flexible and allow them to manipulate to drill down to the data they need. |  |  |
| Customer Flow & Local Policy and Procedures | * Show project webpages where we find links to recordings and resources. * Review Milestones, Epics, Features * Next Steps of Discovery Process – Page Transition, Data Collection, and identification of User Stories * Start with New Customer – Discuss paper and online forms used in the initial interaction with the customer.   Notes:  **December 7, 2023**  **Show project webpages where we find links to recordings and resources**  Rory Callahghan asked in chat for the link to the partner page  **Review Milestones, Epics, Features**  Paul Andrews asked about the Enhance system to store, search, and track customers throughout the customer record, self service customer applicant, active participant, and exited participant status.He would like the functionality to the LWIA office administrators to merge customers and combine the records after verification that it is a valid duplicate record   * Robert would also like to have other features to edit customer records at the local level   **Reviewing Customer Process Flow – Discovery Work**  Monik said that  Robert said that keeping up wit the swipe cards is difficult because people were losing them and updates to the office software (Windows 10, 11) were not always compatible with the time card system.  Paul said that they have 2 forms, one for someone who says they’ve never been to the office before or someone who states that they have been there before  Ashannti said that if they wanted enrolled services, they referred to the virtual application and that application connects them to an account executive Career Specialish depending on the service they need  Thaddeus says that LWIA 6 have a short form for the receptionist uses them to log them into the electronic sign in sheet upon arrival. Intake is available on the website, so if they indicate they are interested in long-term intensice services they are directed to the website or resource room. Allyson said that LWIA 11 works the same way.  Paul said that there are 2 different intake info points – 1) receptionist/navigator that gives service related information. 2) Documentation for the application are either online or at the counter that helps to enter them into IWDS that helps to enter as a customer.   * Longform – has more demographic information, information to enter them as a customer * Shortform – given if they have been in the office before and have a customer record in the system. Have last 4 ssn,   + If the customer says yes, but they can’t find as a customer, staff returns while they’re using services, asks for the long form information   Julia says that a signin sheet when a customer walks in is a common component. LWIA 7 a customer profile isn’t collected until the applicant state. Information is entered in career connect until staff knows they will move forward with a program  Monik says that the One stop vs career Center process setup may cause the difference in the process  Paul (LWIA 3) says that there might be a large volume of people coming through the office so the data is entered by the end of the day  Ashanti says that LWIA 1 does not put them into IWDS until they completed the online virtual application for WIOA services and ask for identifying information  Lori says that local services can only be entered in IWDS once per day, if a customer uses one service in the morning and one in the afternoon, they can only enter once, so entry may be put off to the end of the day  Dan White said there used to be DCEO guidance for the minimum amount of information that was needed to be gathered for services (lora said it was likely the minimum required info from the PIRL  Robert shared minimum info from IWDS screen. There are other reasons than applying for title 1 that occur. In his LWIA, the receptionist takes the basic information, and if they’ve been there before. Then there’s a form for basic information, invite to an intro session for employment. LWIA 1 wanted to talk offline and come back with their first interaction process  Notes:  **December 5, 2023**  **Reviewing Definitions Flow Miro Board:**  Paul (LWIA 3) – We have a different person who starts with the customer, once the customer is at the Inquirant stage they are passed off to the Career Planner to be certified.   * When an individual comes in to use self services, we create a customer record so that we can track them in the system. They are not required to submit any documentation. This does create an issue as it can cause several duplicates in the system. These individuals aren’t given a PII which can cause the duplicates.   Ashannti (LWIA 1) – Similar process to Paul.  Toriana (LWIA 17) – Similar process to Paul.   * When a customer comes into the center we have a system called AJC integrate which tracks basic information such as customer name and why they are here however this is all self reported information and not confirmed via documentation collection.   Thaddeus (LWIA 6) – In most scenarios, the original Career Planner starts the app and also certifies the application.   * Also uses a sign in sheet for self services.   Allyson (LWIA 11) – Has a smaller office, Career Planner does both, starts the app, and certifies it.   * Our biggest issue is collecting PII information from those seeking self service. Often they then don't get reported as a result.   Robert (LWIA 1) – Every employee knows how to complete/certify every type of application in LWIA 1.  Dawn (LWIA 21) – Their LWIA has one Career Planner per county and that Career Planner works with each customer from start to finish.   * Although we have recently started doing meetings where we go over each applicant to see about eligibility before we enroll. * We have a sign in sheet, with Name, phone #, email address and zip code. Then we add to system. So then yes there ends up being more duplicates.   Kristi (LWIA 7) – Here at LWIA 7 we have different staff doing different parts of the application. So each agency does something different. Some do start to finish. Some do only eligibility up to the applicant and someone else will add the enrolling service.  Julia (LWIA 7) – LWIA 7 does not use Career Connect to track universal services. It is seldomly used or not a usual practice. There's more to the process than a simple DOB and SSN change because of the API.  Lori (LWIA 13) – When a customer comes in, they will issue them a swipe card # and will use that as their PII. When they come back in, they can be searched by this number and helps stops duplicates. The swipe card # is generated in IWDS.  Question: What percentage of individuals provide an email address?   * LWIA 1: Majority do have an email address but they don't always remember the password. * LWIA 11: Most often people have one; they can't always get into it though. * LWIA 21: More than 90%. If they don’t have an email, we help them set one up. * LWIA 7: Majority of customers have email addresses. We do not use email addresses to identify customers, we use a customer ID. The customer ID is created when the customer profile is created. This is helpful to identify or correct duplicates within Career Connect.   Career Connect has the capability to merge accounts in the system if they have a different name (ie. They got married/divorced) but have the same DOB and/or SSN.   * If a customer has a different last name because they got married, LWIA 1 has the capability to change the name in the system to reflect the new name instead of creating a second account and eventually merging them.   Question: What do you do when a customer comes through the front door for the first time?   * Paul (LWIA 3) – They have a front desk navigator who works with a customer to determine what they need to do. If they need self services, they will be sent to the career center. If they need training, they would go to pre-enrollment. Would get more info on what they want training on and then funneled into a specific program. They would fill out a specific form to collect information to get them into the system. This isn’t universal across the state but most LWIAs likely have a similar form or process. * Rory (LWIA 6) – Some LWIAs ask first-time workNet/AJC visitors to complete a short survey about their needs, and then it helps us determine which agency partner we could refer them to, and then we go from there. This survey is available on their website, it is not an IWDS form. * Ashannti (LWIA 1) – If a customer walks in our resource room staff will ask what services they need. If they are interested in one of the self-services they are assisted with that, but if they are interested in an enrolled service (training or paid work experience) the customer is referred to our virtual application. The customer completing the online application indicates their interest. * Julia (LWIA 7) – In most cases a customer profile isn't created until the Applicant stage. By then, a customer would have attended an Orientation for the WIOA program. All customer information is collected in the local WIOA application given in an orientation. * Toriana (LWIA 17) – Customer completes a pre-application and some sort of orientation (if they are not pursuing self services) before they are entered into the system as an Inquirant. * Lori (LWIA 13) & Robert (LWIA 1) – Customer must complete an information session and complete an information packet before they are even able to meet with a Career Planner. This is important to ensure that the customer knows what they are getting into before completing an IWDS application. * Dawn (LWIA 21) – Customer comes in. Tells what they need. Have them Sign in. Go over our resources and training information and then get them to where they need to be and always hand them our pre-application, to fill out if wanting training or OJT or Work Experience or if they would like to share with someone else.   Something that was recently rolled out earlier this year in Career Connect is that a partial profile can be created as well. This idea may or not be helpful for future discussions.  There are now three non-enrolling services (called pre-enrollment activities for 1Y) that must be entered before an active enrolling service can be entered.   * Non-enrolling vs enrolling services will need to be a flag/tag on the service management tool where we store the list of services the career planners are able to use.   Question: What assessments are completed after a customer is certified?   * The bulk of assessments are actually completed before certification.   + i.e – interest assessments, needs assessments, skill assessments * Some assessments that are related to specific programs are completed after certification. * There are specific screens in IWDS that record assessments before certification. The assessment summary screen can be used before certification. * LWIA 1: Our initial assessments are for individuals interested in training and part of their requirements and are done prior to certification. Those assessments include Financial Literacy Assessment, Interest Profiler, TABE, Basic Skills Screening Tool, and Digital Literacy Assessment. * CASAS and TABE can only be entered once an application has been started, but it doesn’t have to be certified.   Paul (LWIA 3) – Their IEP/ISS is tied to their comprehensive assessments. They use the assessments completed before the application to fill in the gaps.  There has been a request for years for the state (DCEO) to create a universal IEP/ISS that all LWIAs can use but this request has never been completed. Due to this, all LWIAs have their own IEP/ISS.   * Most locally-developed IEPs are probably similar in format and content.   Career Connect has two different roles of individuals who can work with the customer (there are 22 different roles, but these are the main two):   1. Career Coach/Career Planner 2. Business Services Rep – Staff Accounts   **Questions to Consider:**  Why are we keeping Inquirant records in the IWDS system who never move forward to the application stage if they are inactive for longer than 6 months? Can this process be changed/edited in the new system?   * Kelly L – Also, yes, valid point on length of time to keep inquires in the system and while basic career services aren't part of performance- DCEO does report these efforts to DOL. This can also serve as a recruitment/follow-up strategy that can drive potential enrollment for LWIAs.   From Kelly L - Would an IwN customer ID be one multi-identification factor? Along w/ DOB, SSN, to make matches between programs and avoid duplicate entries?  We need to clarify and then determine at what point we collect and enter certain types of data from the customer?   * We also want to ensure that we can record and track the number of those who are utilizing self services, who only needs resume help or needs to attend a workshop, and who will move forward to complete a WIOA/Trade application.   Will the new system have a way to delete/edit assessments? A customer might come back later and want to complete updated assessments. | Email Taylor any version of paper and/or google intake form/survey – Due 12/7/23  Email Taylor a copy of your local IEP/ISS – Due 12/7/23  Lynette said that the link would be coming soon  Added a note to the Milestone Breakdown\_V2 document | [Miro Board](https://miro.com/app/board/uXjVNWruFQk=/) |
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| Future Agenda Items | | | |
| Define Feature Sets |  |  |  |
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| Reference Notes | | | |
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| Archived/Completed Agenda Items | | | |
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