

PURPOSE FOR THE TRAINING GUIDE

To assist agencies with the following:

- Navigating Career Connect Help Desk
- Onboarding New Agency/Staff
- Refresher /Crash Course

Access Career Connect Help Desk at: <https://workforceboard.zendesk.com/hc/en-us>

The help desk is a website where the partnership houses state and local policies and procedures. We refer to this as our electronic library where you can find forms, documents and webinars and submit a help desk ticket.

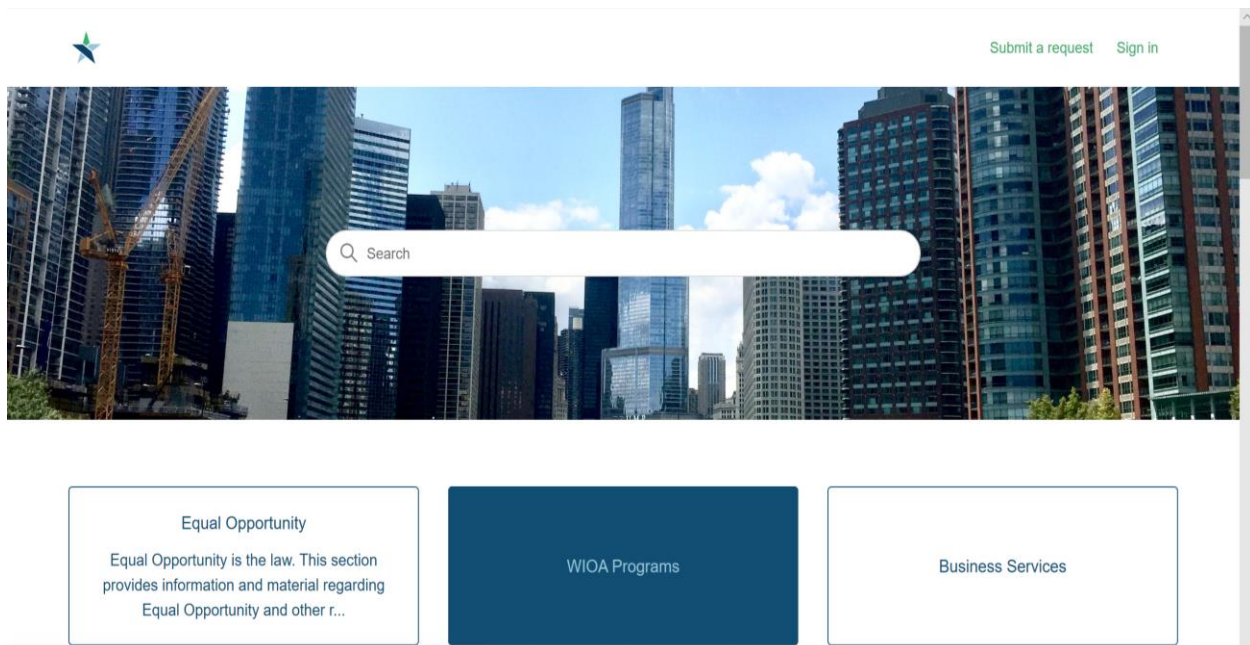


Table of Contents

PURPOSE FOR THE TRAINING GUIDE:	1
ELIGIBILITY	3
DCEO Eligibility Webinars	3
Eligibility Checklists	3
Income Calculation	4
Remote Eligibility WIOA Staff Resources	4
BASIC SKILLS ASSESSMENT	4
CAREER COACHING: CUSTOMER FLOW	5
Career Coaching Overview.....	5
Objective Assessment Summary (OAS).....	5
Career Exploration Procedure.....	5
IEP/ISS Procedure/Includes Skill Inventory Worksheet	6
CASE NOTE GUIDANCE	7
SERVICES & DEFINITIONS	7
INDIVIDUAL TRAINING ACCOUNT (ITA)	8
MEASURABLE SKILLS GAINS (MSG)	8
CREDENTIAL PROCEDURE	9
EMPLOYMENT PROCEDURE	9
CLOSURE/EXIT	9
QUARTERLY FOLLOW-UP	10
REPORTS	10

ELIGIBILITY

Purpose:

The purpose of this procedure is to provide guidance on how to complete Eligibility for potential participants.

Zendesk Search Keyword: Eligibility

DCEO Eligibility Webinars

Adult (1A): Please note there are several topics covered in each of these sections, please review the topic that applies to your program. There are links that includes adult eligibility, please review both.

Link 1:

<https://workforceboard.zendesk.com/hc/en-us/articles/8823170584589>

Link 2:

<https://workforceboard.zendesk.com/hc/en-us/articles/8822780229005>

Dislocated Worker (1D)

<https://workforceboard.zendesk.com/hc/en-us/articles/8829877212685>

Youth(1Y)

<https://workforceboard.zendesk.com/hc/en-us/articles/8823170584589>

Eligibility Checklists

Adult: <https://workforceboard.zendesk.com/hc/en-us/articles/115000831412>

Dislocated: <https://workforceboard.zendesk.com/hc/en-us/articles/360015621111>

Youth (In-School): <https://workforceboard.zendesk.com/hc/en-us/articles/360015426912>

Youth (Out of School): <https://workforceboard.zendesk.com/hc/en-us/articles/360015621291>

Income Calculation

<https://workforceboard.zendesk.com/hc/en-us/articles/360001934731>

Income Calculation Worksheet: <https://workforceboard.zendesk.com/hc/en-us/articles/360001560312>

Income Calculation Calendars: <https://workforceboard.zendesk.com/hc/en-us/articles/360001576931>

Remote Eligibility WIOA Staff Resources

This guide includes document upload instructions.

<https://workforceboard.zendesk.com/hc/en-us/articles/360042420211>

BASIC SKILLS ASSESSMENT

Purpose:

The purpose of this procedure is to provide guidance on how to assess basic skills for WIOA eligibility and training suitability for participants. **Please note:** *The Basic Skills Screening Tool* is required at intake for all WIOA applicants. A copy of the tool can be found within procedure.

Zendesk Search Keyword: Basic Skills

Adult/Dislocated Worker <https://workforceboard.zendesk.com/hc/en-us/articles/4405029111181>

Youth: <https://workforceboard.zendesk.com/hc/en-us/articles/4404047986317>

CAREER COACHING: CUSTOMER FLOW

Purpose:

The purpose of this procedure is to provide guidance on the customer flow of participants and provide an overview of Career Coaching.

Career Coaching Overview

Career Coaching Overview Session 1: Webinar Recording:

<https://attendee.gotowebinar.com/recording/5278805216342930440>

Objective Assessment Summary (OAS)

We have created 2 paper forms of the OAS that you can use before entering this information into Career Connect. One form will be for the customer to fill out. The other form will be for the Career Coach to complete. This information will then need to be entered into Career Connect.

Zendesk Search Keyword: Objective Assessment Summary

<https://workforceboard.zendesk.com/hc/en-us/articles/360045946171>

Customer Flow Session 2: Webinar Recording:

<https://workforceboard.zendesk.com/hc/en-us/articles/360060897212>

Career Exploration Procedure

The Career Exploration must be completed before an Individual Employment Plan (IEP) or Individual Service Strategy (ISS) can be developed.

Zendesk Search Keyword: Career Exploration

<https://workforceboard.zendesk.com/hc/en-us/articles/360057850792>

Customer Flow Session 3: Webinar Recording:

<https://attendee.gotowebinar.com/recording/6140925686656569613>

IEP/ISS Procedure/Includes Skill Inventory Worksheet

The IEP/ISS is a living document, and it is to be reviewed on a regular basis and updated whenever a change is made to the customer's plan. The Skills Inventory Worksheet (SIW) can be found in this procedure. As a reminder the SIW is required for all new career coaching and any customers going to training.

Zendesk Search Keyword: IEP/ISS

IEP/ISS <https://workforceboard.zendesk.com/hc/en-us/articles/360046803691>

Customer Flow Session 4: Webinar Recording:

<https://attendee.gotowebinar.com/recording/4575141963976951564>

Skills Inventory Worksheet

<https://workforceboard.zendesk.com/hc/en-us/articles/360046803691>

CASE NOTE GUIDANCE

Case notes must be entered into the appropriate case management system within ten (10) calendar days of the service delivery and the regular contact (typically thirty (30) days).

Zendesk Search Keyword: Case Note

<https://workforceboard.zendesk.com/hc/en-us/articles/360058453731>

Customer Flow Session 5: Webinar Recording:

<https://attendee.gotowebinar.com/recording/6052390811519616272>

SERVICES & DEFINITIONS

A guide that provides service program definitions for each service opened in Career Connect.

Zendesk Search Keyword: Service Definition

<https://workforceboard.zendesk.com/hc/en-us/articles/360050548012>

Webinar:

<https://attendee.gotowebinar.com/recording/441488413368792847>

Supportive Services

A guide of allowable support services

<https://workforceboard.zendesk.com/hc/en-us/articles/115003537812>

INDIVIDUAL TRAINING ACCOUNT (ITA)

Purpose:

The purpose of this procedure is to provide an overview of the individual Training Account (ITA) process and explains the targeted occupations for ITAs.

Zendesk Search Keyword: ITA

<https://workforceboard.zendesk.com/hc/en-us/articles/360020502172>

Link 1:

You can access a recorded webinar about the new ***ITA process*** here:

<https://attendee.gotowebinar.com/recording/2095371590315382785>

Link 2:

You can access a recorded webinar about the ***voucher training*** here:

<https://register.gotowebinar.com/recording/8547531227609376001>

MEASURABLE SKILLS GAINS (MSG)

Purpose:

The purpose of the Measurable Skill Gains (MSG) indicator is to track and measure important progressions and achievements made by WIOA clients (entered in training or education).

Zendesk Search Keyword: Measurable Skills Gain

Illinois workNet Presentation:

[AALWIA7WIOA Presentation MSG 1-24-19.pdf](#)

CREDENTIAL PROCEDURE

Purpose:

The purpose of this procedure is to explain the process for correctly adding the credential or credentials.

Zendesk Search Keyword: Credential Procedure

<https://workforceboard.zendesk.com/hc/en-us/articles/360001371732>

EMPLOYMENT PROCEDURE

Purpose:

The purpose of this procedure is to explain the process for correctly adding the unsubsidized employment.

Zendesk Search Keyword: Employment Tracking

<https://workforceboard.zendesk.com/hc/en-us/articles/115002565312>

CLOSURE/EXIT

Purpose:

The purpose of this procedure is to provide an overview of how to complete closure /exit process of a participant's case.

Zendesk Search Keyword: Exit

<https://workforceboard.zendesk.com/hc/en-us/articles/360001375152>

QUARTERLY FOLLOW-UP

Purpose:

The purpose of this procedure is to provide guidance of how to enter outcomes after exit.

Zendesk Search Keyword: Quarterly Follow-up

<https://workforceboard.zendesk.com/hc/en-us/articles/360014871492>

WEBINAR:

<https://attendee.gotowebinar.com/recording/7622829846057143811>

REPORTS

Purpose:

This document explains how to navigate to the new Career Connect reports menu and provide a general overview of how to filter, download, and save reports. Looking for more information on WIOA Performance Management & Reporting.

Zendesk Search Keyword: Reports

<https://workforceboard.zendesk.com/hc/en-us/articles/6503046470541>

Link 1:

<https://attendee.gotowebinar.com/recording/7651484248671768839>

Link 2:

<https://workforceboard.zendesk.com/hc/en-us/articles/360059762371>