

8-31-2022



Assessment

Individual Employment Plan/Individual Service Strategy

Objective



- The objective of this power point is to discuss and demonstrate the requirements tied to WIOA new client assessment and discuss the tools available within Career Connect for recording assessment results.
- Secondly, we will discuss the requirements for recording the services of the Individual Employment Plan (IEP) for Adult and Dislocated Worker clients, and the activity of Individual Service Strategy for Youth clients within Career Connect.

Federal Policy Guidance



- **Workforce Innovation and Opportunity Act (WIOA) of 2014.**
- **Training and Employment Guidance Letter (TEGL) 19-16 - Guidance on Services Provided through Adult and Dislocated Worker under WIOA - dated March 1st, 2017.**
- **TEGL 21-16 - Third WIOA Title I Youth Formula Guidance - dated March 2nd, 2017.**
- **TEGL 07-20 - Implementation of Priority of Service in WIOA Adults - dated November 24th, 2020.**

State Policy Guidance



Office of Employment and Training (OET) WIOA ePolicy Chapter 4.2 - Career Planning -12-1-2021

- There is a Question and Answer (Q&A) document that accompanies the Career Planning Policy that includes Frequently Asked Questions (FAQ) that were submitted when the ‘draft’ version of the Career Planning Policy was being developed and had been ‘shared’.
- In addition, there is a three-page WIOA Assessment Fact Sheet that is also included as part of the Career Planning Policy.

WIOA Assessment Fact Sheet



OFFICE OF EMPLOYMENT AND TRAINING

WIOA Assessment Fact Sheet

PRINCIPLES OF EFFECTIVE ASSESSMENT

Under the Workforce Innovation and Opportunity Act (WIOA) an effective assessment is the foundation for understanding the participant's employment goals, existing skills, career readiness, and determining all appropriate barriers to education or employment that may exist. Assessment is an ongoing extension of the intake process and guides the career planner's development of the Individual Employment Plan (IEP) for Adults and Dislocated Workers or the Individual Service Strategy (ISS) for Youth.

COMPONENTS OF A COMPREHENSIVE OBJECTIVE ASSESSMENT

A comprehensive objective assessment includes a review of the academic skill level, as well as the service needs and strengths of the participant. This includes considering the abilities, aptitudes, interests, and occupational and employability of the participant. Barriers to employment and training that will interfere with participation in the program should be assessed on a continual basis and supportive services provided as needed.

WIOA Assessment Requirements



- It is important to understand, under WIOA, there are mandated assessment requirements that must be followed.
- The new Office of Employment and Training Career Planning Policy Chapter 4 Section 2 was issued in December 2021 and provides extensive guidance around assessments and Career Planning.
 - Section 4.2.4 of the Career Planning Policy states, “a thorough assessment is the foundation for understanding the participant’s employment goals, existing skills, career readiness, and determining all appropriate barriers to education or employment that may exist”.

Career Planning Policy



- Under this presentation, we are not going to dig into “all” of the details within the Career Planning Policy but cover the highlights of the assessment requirements and discuss the tools within Career Connect for recording the assessment.
- It should be noted, in February 2022, Lora Dhom with the Policy Unit conducted a webinar discussing the Career Planning Policy that can be accessed at the following link:
[OET \(illinoisstate.edu\)](https://illinoisstate.edu/OET)

WIOA Assessment Requirements



Chicago Cook Workforce Partnership staff have done an exceptional job of conducting various webinar/virtual trainings that I will reference during this presentation. If you were not able to participate in the original webinars/virtual training, all are recorded and posted on the Career Connect Zen Desk, under WIOA Programs a Career Coaching: Customer Flow Webinar Series:



[Chicago Cook Workforce Partnership](#) > [WIOA Programs](#) > [Career Coaching Resources](#)

Articles in this section

[WIOA Staff Training Guide & Worksheet](#)

Career Coaching: Customer Flow Webinar Series

WIOA Assessment Requirements



- An excellent presentation the Partnership staff conducted was on the Basic Skills and Objective Assessment Summary;
- For anyone that did not participate (or view the recording of the session) from the March 2nd, 2021 Basic Skills & Objective Assessment Refresher, the recording can be found at: **[Session 2: Basic Skills & Objective Assessment Refresher presented on March 2, 2021](#)**
- It will provide a refresher of the Basic Skills and Objective Assessment Summary. The slides from the webinar are attached. The recorded webinar is available at:
- **<https://attendee.gotowebinar.com/recording/5278805216342930440>**

WIOA Youth Assessment Requirements



- The Workforce Innovation and Opportunity Act (WIOA) legislation and Training and Employment Guidance Letter (TEGL) 21-16 - Third WIOA Title I Youth Formula Guidance and the new Career Planning Policy - have mirror guidance on requirements for Youth client assessment.
- This guidance states, *“any individual who is going to be served under the Youth title, must have a complete assessment prior to the client being determined eligible and enrollment in WIOA Youth services.”*

WIOA Youth Assessment Guidance:



- **Section 129(b)(2)(c)(1)(A) of WIOA Legislation States:**
- **Career Planners must provide an objective assessment of:**
- **Academic levels**
- **Skill levels**
- **Service needs of each participant**
- **Review of basic skills**
- **Occupational Skills**
- **Prior work experience**
- **Employability**
- **Interests**
- **Aptitudes (including interests and aptitudes for nontraditional jobs)**
- **Supportive service needs**
- **Development needs of the participant**
- **The assessments must also consider a youth's strengths rather than just focusing on areas that need improvement**

WIOA Youth Assessment Guidance



- **The initial Youth Assessment must be completed, including the requirements for the individual to take their pre-assessment Math and Reading test (which fulfills the requirements of assessing “Basic Skills”,) prior to the Youth entering the WIOA program.**
- **The information gathered under the initial assessment of the Youth, will be used to create the initial “Individual Service Strategy” (ISS); and both the assessment and the initial ISS, should support the Youth being enrolled in the WIOA Youth Program.**

Individual Service Strategy (ISS)



- An ISS is an agreement of skills and goals decided between the WIOA Youth participant and WIOA Youth Career Coach that sets out ‘the plan’ for the participant to make progress towards his/her educational and employment goals.
- The previously discussed [Session 2: Basic Skills & Objective Assessment Refresher presented on March 2, 2021](#) breaks out the different sections within Career Connect to record the various portions of the assessment.

Youth Individual Service Strategy



Chicago Cook Workforce Partnership staff have conducted a webinar on the IEP/ISS and the presentation can be found on Career Connect Zen Desk and should be viewed by anyone who had not participated in the original session or reviewed the recording:

- **Session 4: IEP/ISS Refresher and Skill Inventory Worksheet (SIW) presented on March 9, 2021**
- Session provides a refresher of the IEP/ISS Plan and includes a discussion on the Skills Inventory Worksheet (SIW). The slides from the webinar are attached. The recorded webinar is available at:
- <https://attendee.gotowebinar.com/recording/4575141963976951564>

Enrollment in the WIOA Youth Program



- It is important to understand, the Youth activity of ‘Individual Service Strategy’ itself, is not a service/activity that supports enrollment in the WIOA Youth Program.
- In fact, even those actions as taken part of the assessment, are not considered service/activity under the WIOA Youth Program.
- To be considered enrolled in the WIOA Youth Program, the activities/services must be tied to the 14 Youth Elements:

Youth Elements that Support Enrollment



WIOA Title IB Youth client services/activities are tied to 14 different youth program elements:

- 1. Tutoring, study skills training, instruction and dropout prevention;**
- 2. Alternative secondary school services or dropout recovery services;**
- 3. Paid and unpaid work experience;**
- 4. Occupational skills training;**
- 5. Education offered concurrently with workforce preparation and training for a specific occupation;**
- 6. Leadership development opportunities;**
- 7. Supportive services;**
- 8. Adult mentoring;**
- 9. Follow-up services;**
- 10. Comprehensive guidance and counseling;**
- 11. Financial literacy education;**
- 12. Entrepreneurial skills training;**
- 13. Services that provide labor market information;**
- 14. Postsecondary preparation and transition activities.**

Youth Elements that Support Enrollment



- To tie this together, if a Youth client just has the Youth activity of Individual Service Strategy and/or the activity of Career Planning (Case Management) with no other Youth services/activities, the individual will not be considered enrolled in the WIOA Youth Program.
- To be considered enrolled in the WIOA Youth program, the activities/services must be tied to one or more of the 14 Youth program elements shown on the previous slide.

WIOA Adult and Dislocated Worker



- **For Adult and Dislocated Worker clients, under both the WIOA Legislation and TEGL 19-16 - Guidance on Services Provided through Adult and Dislocated Worker under WIOA - provides guidance on requirements for assessments prior to enrollment in WIOA funded training services.**
- **The new OET Career Planning Policy provides very detailed guidance for Adult and Dislocated Worker clients at all stages of WIOA enrollment, including individuals who might only be initially requiring Career Services.**

WIOA Adult and Dislocated Worker



The Career Planning Policy under subparagraph 4.2.4.1.a.1.) states during intake, the assessment will determine a customer's interests, skills, and needs. This initial assessment provides preliminary information about the individual's skill levels, aptitudes, abilities and supportive service needs. It forms the basis for determining suitability as part of informed customer choice and the development of the IEP.

- a) Interest and skills inventory;
- b) Essential employability skills;
- c) Digital literacy assessment;
- d) Financial literacy assessment;
- e) Basic skills deficiency;
- f) Barriers to employment;
- g) Determination of referrals; and
- h) Supportive services.

WIOA Adult and Dislocated Worker



- It is important to understand, under the guidance within the Career Planning Policy addressed in the last slide, all Adult and Dislocated Worker clients are required to have an initial assessment and an Individual Employment Plan (IEP) created, even if the client is only intending to receive WIOA Career Services.
- Then if the client needs WIOA Training Services, the assessment must be more thorough as outlined in the next slide.

WIOA Adult and Dislocated Worker



The Career Planning Policy states under 4.2.4.1.a.2.), after enrollment, the assessment builds off information gathered at intake and assists with informing the IEP development. As with the assessment during intake, career planners must address informed customer choice when determining suitability for training in a particular career pathway. At a minimum, the continuation of the assessment must address the following areas:

- a) Employment goals;
- b) Suitability for employment and/or training program;
- c) Review of training options including work-based learning and/or traditional training provided through an Individual Training Account (ITA) by a training provider that is on the Eligible Training Provider List (ETPL) if training is needed to meet employment goals;
 - i. The training service must align with the participant's existing skills and career readiness using the results from the interest and skills inventory.
 - ii. The career planner must facilitate a process that provides the participant with an informed choice of training options.
- d) Barriers to employment for the chosen career pathway (e.g., criminal history, substance abuse);
- e) Determination of referrals (coordination with partner programs or community organizations that provide training and education resources);
- f) Supportive services (as supportive service needs may change if attending training);
- g) Progress Reporting; and
- h) Follow-up.

Guidance on Individual Employment Plan



- The Career Planning Policy under section 4.2.5 gives detailed guidance about both the Individual Employment Plan (IEP) and the Individual Service Strategy (ISS).
- As mentioned earlier, CCWP staff have conducted a webinar on the IEP/ISS and the presentation can be found on Career Connect Zen Desk and should be reviewed by anyone who had not participated in the original session or reviewed the recording:
- **Session 4: IEP/ISS Refresher and Skill Inventory Worksheet (SIW) presented on March 9, 2021**
- Session provides a refresher of the IEP/ISS Plan and also includes a discussion on the Skills Inventory Worksheet (SIW). The slides from the webinar are attached. The recorded webinar is available at:
- <https://attendee.gotowebinar.com/recording/4575141963976951564>

Individual Employment Plan (IEP):



- An IEP is developed by the Participant and the Career Planner to identify the participant's overall employment goal, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goal, including providing information on eligible providers of training services and career pathways to attain career objectives.
- The IEP (like the ISS), is a living document that once developed, it must be signed by the participant and be properly documented within Career Connect.
- Additionally, anytime the IEP has changes made, both the Participant and the Career Planner must be aware of the changes and why they are needed and agree to the changes.

From Career Planning Policy Guidance

The IEP/ISS should be written with a S.M.A.R.T.E.R objective.

- Specific
- Measurable
- Attainable
- Relevant
- Time-Driven
- Evaluate
- Reflection and Adjustment



**"If you aim at
nothing, you will hit
it every time"**

Author Unknown

Conducting the Actual Assessment



- So far in this presentation, we have spoken more about the requirements around the assessment and recording the results, let us discuss some of the actual details about conducting the assessment.
- Some things for consideration regarding the new client assessment include the Career Coaches role in the assessment.

Career Coach Role



Some valuable skills needed to conduct a good assessment:

- **Ability to listen**
- **Ability to be non-judgmental**
- **Ability to block out distractions**
- **Ability to have the client trust you**
- **Ability to guide the client towards the most beneficial program for them and for your agency**
- **Ability to document the assessment**

Parts of an Assessment:



Formal Assessment involves using some alternative tools that are available; the information gleaned from the formal assessment tools, could then be combined with information learned from other informal assessment steps, such as the one-on-one interview and observations:

Interest Inventories

Aptitude and Ability Tests

Personality or Management Style

Career Development Assessments

Formal Assessment Tools



There are many “Formal” Assessment Tools available including but not limited to:

- **TABE 11-12 and CASAS GOALS assessment tests;**
- **English as a Second Language (ESL) assessment tests;**
- **Illinois Career Information System;**
- **Interest Determination, Exploration and Assessment System (IDEAS);**
- **Values: Work Importance Locator;**
- **Competency Model Clearinghouse;**
- **Minnesota State CAREERwise;**
- **Illinois Job Link.com;**
- **Resources within Illinois workNet (IwN) (see next few slides);**

Within Illinois workNet (IwN)



There are some “formal” assessment tools within IwN under “Skills & Interests” that could be utilized:



IwN Skills & Interests

Some of the tools within IwN include “Career Cluster Inventory”; “Interest Profiler” and “Work Importance Locator”:

Career Cluster Inventory



Rate 80 activities as like very much, like, dislike, or not sure.

Results: Provides a graph indicating how your interests match up to each career cluster area.

Duration :  5-25 minutes

Interest Profiler



There are 180 activities. Choose if you like, dislike, or are unsure for each activity.

Results: Organizes interests into 6 categories of work with a score between 0 and 30.

Duration :  10-20 minutes

Work Importance Locator



Group 20 statements based on how important the work aspect is to you.

Results: Provides scores for 6 work values and occupations for each work value.

Duration :  5-15 minutes

IwN Skills & Interests

Other tools within IwN under Skills & Interests include “Reality Check” and “Learning Style Survey”:

Reality Check



15 questions to help you identify specific occupations to choose from based on the cost of living expenses in a specific city/region.
Results: Provides a list of occupations, training/education needed, and salary earned in the city/region of your interest.

Duration :  5-10 minutes

Learning Style Survey



Rate 24 activities as “Often,” “Sometimes,” or “Not Often” to discover your learning style.
Results: Provides scores for three learning styles such as auditory, tactile, and visual.

Duration :  5-10 minutes

Informal Assessment



- Besides the formal assessment, a large part of the assessment is the interaction between the Career Planner and the client which is the 'informal' portion of the assessment.
- Informal Assessment includes the one-on-one interaction between the Participant and the Career Planner, where the Career Planner and client are looking at various things including but not limited to identifying strengths, transferable skills, interests, work values, personal priorities related to employment.
- An assessment is part of a process leading the self awareness and relies on active participation by the participant.

Informal Assessment



- **In the different presentations about the Objective Assessment Summary and the IEP/ISS that the Partnership staff have conducted, they have emphasized the assessment is a time where the Career Coach and the WIOA client are ‘getting to know you, who are you?’**
- **The Career Coach primarily uses opened ended questions to get the individual to share their hopes, dreams, ambitions, for future including details about the individuals short and long-term goals.....**
- **As a Career Coach, besides utilizing those opened ended questions, you are also continually making observations during the assessment.**

Parts of an Informal Assessment



Interview Examining Many Aspects

Education/Experience/Transferable Skills

Observation

Values Assessments

Documenting the Assessment



- **The career planner will be gathering many types of information. Always remember, the job isn't done, until the paperwork is done.**
- **Using the information from the formal assessment tools, along with the information gathered from the informal assessment is used together when putting together a complete picture of the assessment.**

Documenting the Assessment



- Under the Career Planning Policy, section 4.2.6 - Service Documentation (Case Management), specifically paragraph 5., where it states “*Documentation of any completed assessment must follow policy, be recorded in the career planning system (Career Connect or IWDS)*”;
- The ‘Objective Assessment Summary’ within Career Connect provides much of the basis for where the assessment results are recorded.
- One point, for and Adult and/or Dislocated Worker, one of the first services that should be recorded after certification is the Career Service of ‘Comprehensive and Specialized Assessment’; this is recorded to take credit for the assessment work you are doing with the client.

Ownership of the Assessment and Plan



- **Part of making an employment plan/service strategy is to make sure that the participant takes some ownership in the process of researching potential careers.**
- **You could and should assist in guiding the client towards programs that are mutually beneficial for the client and the overall WIOA program.**

Case Notes



- **Within the Career Planning Policy under section 4.2.7 Case Notes provides detailed guidance about Case Notes.**
- **Including under 4.2.7. paragraph 5.a.,b.,c.,d.,e.,&f., where it provides specific guidance about case notes under headings of “Introduction”; Determination of Training Need”; “Training Begin Date (if applicable)””; “Training End Date (if applicable)””; “Service Closure/Exit””; and “Follow-up”.**
- **In addition, Partnership has put together an excellent eight (8) page ‘Case Note Guidance for WIOA Adult, Dislocated Worker, and Youth Programs’ document that provides very detailed guidance around case notes including details on Subject Line, with descriptions about the case note and relevant policy or procedure references.**

CCWP Case Note Presentation



As part of the Chicago Cook Workforce Partnership Career Coaching Webinar Series, in March 2021 there was an excellent presentation providing detailed ‘Case Note Guidance’, if you have not yet viewed that presentation it can be found on the Zen Desk:

- **[Session 5: Case Note Guidance presented on March 11, 2021](#)**
- Session 5 provides an overview of the Case Note Guidance document. The slides from the webinar are attached. The recorded webinar is available at:
- <https://attendee.gotowebinar.com/recording/6052390811519616272>

State Case Note Presentation



- In April 2022, Robin Kralman with the Monitoring Team conducted a virtual Case Note Training; the recording of this presentation can be found: <https://ilworkforceacademy.com/workforce-webinars/>
- One of the key items that I would like to share was a case note format that Robin shared during her training was around format ideas including using a barriers and then solutions format.

Case Note Format Ideas

Barriers

- Lack of training on how to properly formulate a case note to include required components
- Lack of training on entering case notes in chronological order to validate the decision-making process of the participant's enrollment into services
- Copying and pasting the same case notes each month

Solutions



Reason for the contact

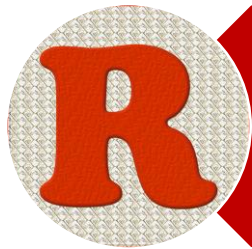


Action needed and/or services planned or provided



Progress/Plan towards Goals and Objectives

Example Case Note Format



Reason for the
contact



Action needed
and/or services
planned or
provided



Progress/Plan
towards Goals
and Objectives

Note Category: WIOA Case Note Supporting Same Day Service

Note Subject: Fall 2021 grades received/ Spring 2022 Voucher issued

Case Note: **(R)** Met with Carl today to issue his Spring 2022 voucher and receive his Fall 2021 grades. Carl brought in his grades for Fall 2021 and received 3A's and 1B. He also brought in his Spring 2022 schedule. **(A)** A review of his curriculum verifies all registered classes for Spring 2022 are required for his HVAC program. A tuition voucher for Spring 2022 was issued for 13 credits. A Supportive Service voucher was provided for a multimeter. MSG was entered in Career Connect for the successful completion of 12 credits for Fall 2021. **(P)** A review of Carl's progress in training is satisfactory as he currently has a 3.9 GPA. He continues to be on track to complete his training goal of obtaining an Associate's Degree in HVAC at Kaskaskia College by the projected End Date of May 15, 2023.

Details about Types of Contact in Case Notes



- **From the case note presentation another topic I really liked that was covered, recommended indicating that the case note author be specific in what type of contact it is when communicating with your participants.**
- **Meaning, making it clear at the beginning of the case note, the particular type of communication/contact was made with the client.**

Acceptable Types of Contact Include:



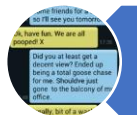
Phone call



Email



Social Media



Text message



In-person contact



Virtual Meetings/Contacts

Certification of Eligibility and Enrollment



- Let us now touch on some key issues around legislatively requirements between Youth clients as compared to an Adult and/or a Dislocated Worker clients.
- For a Youth, as we touched on previously in this presentation, the WIOA legislation as well as Federal and State Policy guidance states that each Youth, must have a complete assessment conducted prior to enrollment in the WIOA Youth Program; and the information gleaned from that initial assessment, will be used to develop the initial Individual Service Strategy.

Youth Certification and Enrollment in Services

- Then after certification of the Youth client, the Youth activity of 'Individual Service Strategy' is the first activity that should be recorded.
- The IEP/ISS should be written with a S.M.A.R.T.E.R objective.
 - Specific
 - Measurable
 - Attainable
 - Relevant
 - Time-Driven
 - Evaluate
 - Reflection and Adjustment



**"If you aim at
nothing, you will hit
it every time"**

Author Unkown

Details about S.M.A.R.T.E.R Objective



- **Specific** - Identify specific short/long-term goals. Specific objectives are the action steps that outline exactly what the participant should do to achieve their goal(s).
- **Measurable** - Define how progress will be tracked. Goals are measurable by the completion of objectives. Measurable goals have benchmarks allowing the participant to see the progress towards successfully achieving goals.
- **Attainable** - Goals and objectives are attainable if the participant can be realistically expected to complete the goal within the timeframe agreed upon.
- **Relevant** - Goals and objectives must be relevant to what the participant is trying to achieve. An appropriate objective will be an action step toward completing the goal. The use of the comprehensive and specialized assessments will guide with creating relevant goals and objectives.
- **Time-Driven** - There should be a target date of progress and completion. A goal without a commitment to a schedule or target dates tends to be forgotten or neglected. This will keep the participant on track and both parties accountable. Goals and defined as short, intermediate, or long-term
- **Evaluate** - Goals, objectives, activities/services, and case notes should be reviewed to assess the success or failure in achieving a participant's IEP/ISS completion.
- **Reflection and Adjustment** - Reflection is a great way for a participant to increase confidence and be more proactive and excited to complete their plan. If any goal changes occur, the plan must be adjusted and mutually agreed upon with the participant.

Career Planning (Case Management)



- **Career Planning (Case Management) is another Youth service/activity that is recommended to be recorded for each client, as a way to document the two-way communication that goes on with an individual while receiving WIOA services.**
 - However, based on WIOA legislation, like the Youth service/activity of Individual Service Strategy; the Youth activity of Career Planning (Case Management) is not a service that supports enrollment in the WIOA Youth Program alone.
 - Meaning, if a Youth client only has the Youth activities of Individual Service Strategy and Career Planning (Case Management) recorded, for Federal Reporting they would not be enrolled in the WIOA Youth Program.
- **As previously mentioned, for a Youth to be considered enrolled in WIOA, they must have a service/activity tied to one or more of the 14 Youth Elements.**

Youth Elements that Support Enrollment



WIOA Title IB Youth client services/activities are tied to 14 different youth program elements:

- 1. Tutoring, study skills training, instruction and dropout prevention;**
- 2. Alternative secondary school services or dropout recovery services;**
- 3. Paid and unpaid work experience;**
- 4. Occupational skills training;**
- 5. Education offered concurrently with workforce preparation and training for a specific occupation;**
- 6. Leadership development opportunities;**
- 7. Supportive services;**
- 8. Adult mentoring;**
- 9. Follow-up services;**
- 10. Comprehensive guidance and counseling;**
- 11. Financial literacy education;**
- 12. Entrepreneurial skills training;**
- 13. Services that provide labor market information;**
- 14. Postsecondary preparation and transition activities.**

Comprehensive and Specialized Assessment



- **Under the Adult and Dislocated Worker, there is a service called ‘Comprehensive and Specialized Assessment’ which should be the first service recorded on any Adult and Dislocated Worker client who has their eligibility certified to take credit for the work accomplished as part of the assessment.**
- **However, under the Youth title, currently ‘Comprehensive and Specialized Assessment’ is not considered a service, due to that activity is not one of the 14 Youth Elements.**
- **This is a bit of a confusing topic, but it goes back to the requirements for the Youth enrollment must be tied to one or more of the 14 Youth elements, and all other actions including the assessment, the Individual Service Strategy, and even Career Planning (Case Management) do not fall under the 14 Youth program elements.**

Adult and/or Dislocated Worker



- **So now back to the Adult and/or Dislocated Worker client, all clients should have that ‘Comprehensive and Specialized Assessment’ service recorded and that is a service that supports enrollment in WIOA.**
- **Under the Adult and/or Dislocated Worker titles, the service of ‘Development of an Individual Employment Plan’ is a service that should be one of the first services recorded after certification and also supports enrollment in WIOA.**
- **Similar, for the Adult and/or Dislocated Worker titles, the service of ‘Career Planning (Case Management)’ also should be one of the first services recorded after certification and is also a service that supports enrollment in WIOA.**

Upcoming WIOA Service Matrix/Policy



- **Soon, there is going to be a new WIOA Service Matrix/Policy issued and these changes in the new service matrix/policy is needed to ensure that as a State, our services are consistent with the guidance in the WIOA legislation and in the Federal Guidance.**
- **There will be a State-wide training around these service matrix/policy changes.**
 - Most of the changes are around the Youth title, and include the details that I had passed on where the Youth activities/services of Individual Service Strategy and Career Planning (Case Management) alone do not support a Youth being enrolled in the WIOA Youth program.

Two-way Communication Requirements



- **Within the OET Career Planning Policy under section 4.2.6 Service Documentation (Case Management) paragraph 1., “regular contact is defined as two-way communication that occurs every thirty (30) days.**
- **Within the Illinois Performance Accountability & Transparency System (IPATS), there is a dashboard, that each Career Planner should be logging into at a minimum of once a week, to ensure they stay on top of the issue with their clients.**

Changes Coming to Youth Services in Career Connect



- **There are significant changes coming soon to Youth Activities/Services in Career Connect to align with the WIOA Legislation and Federal Reporting.**
- **As previously mentioned in this training, certain activities must be completed prior to enrollment in the WIOA Youth Program.**
 - The Youth activities of Individual Service Strategy (which will be renamed to “Development of Individual Service Strategy” under the upcoming changes) and Career Planning (Case Management), must be entered in Career Connect. These activities provide a documentation mechanism to enter case notes to support enrollment in the Youth program.
 - These are activities NOT SERVICES, therefore these activities **ARE NOT** activities that trigger participation for youth, these **DO NOT** count for federal reporting, and **ARE NOT** reported under one of the 14 youth program elements under the Participant Individual Record Layout (PIRL), nor **DO THESE** extend the date of exit.

Youth Activities/Services



- **Meaning, for any Youth who ONLY has one or both of Individual Service Strategy and/or Career Planning (Case Management) would not be included as a Youth Participant (called a “Registrant” in Career Connect).**
- **However, once a youth service directly tied to one or more of the fourteen (14) Youth Elements has been provided, the Youth client will become a WIOA Participant (called a “Registrant” in Career Connect).**
- **There will be a separate State-wide training around these service changes when the State Policy/Service Matrix gets completed and these changes get put into Career Connect.**

Youth Elements that Support Enrollment



WIOA Title IB Youth client services/activities are tied to 14 different youth program elements:

- 1. Tutoring, study skills training, instruction and dropout prevention;**
- 2. Alternative secondary school services or dropout recovery services;**
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- 10. Comprehensive guidance and counseling;**
- 11. Financial literacy education;**
- 12. Entrepreneurial skills training;**
- 13. Services that provide labor market information;**
- 14. Postsecondary preparation and transition activities.**

Concludes this Presentation



- **This concludes the presentation on Assessments, Individual Employment Plans & Individual Service Strategies; along with the tools within Career Connect to record the assessments.**
- **We also covered the importance of good descriptive case notes.**
- **Lastly, we discussed how enrollment in the WIOA Youth Program requires enrollment in an activity tied to one or more of the fourteen (14) Youth Elements.**

Additional Training Opportunities



Workforce Innovation Opportunity Act (WIOA) Professional Development

The Illinois Center for Specialized Professional Support (ICSPS) assists in facilitating WIOA professional development. WIOA Professional Development webinars are available to assist one-stop operators, WIOA administrators, WIOA core partners, and other service providers. This includes weekly Workforce Wednesday Webinars, the WIOA Summit, and a variety of other professional development opportunities. Be sure to join the ICSPS email listserv at <https://icsps.forms-db.com/view.php?id=149615> to receive announcements and participate in upcoming training

Questions ?



Please contact your Chicago Cook Workforce Partnership Regional Manager or Project Coordinator for any questions.