SCPa WORKS

SOUTH CENTRAL WORKFORCE DEVELOPMENT BOARD

Individual Employment Plan & Individual Service Strategy Training

The following training materials were developed and published by the Pennsylvania Department of Labor and Industry and are housed under the HELP tab in the Commonwealth Workforce Development System (CWDS) by navigating the following prompts:
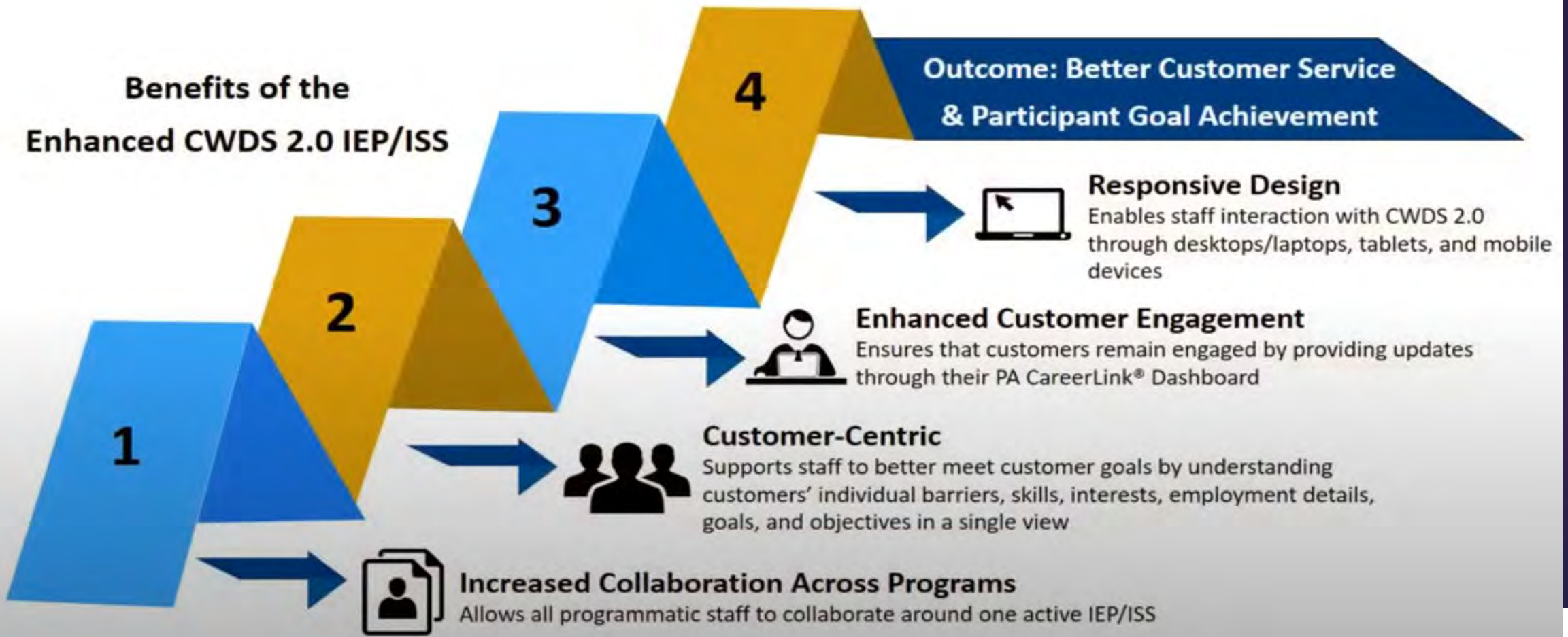
CWDS Help > Documents > Groups > Desk Guides & Training Materials > IEP-ISS Training Resources

The CWDS Job Aid is titled as such:

JOB AID — Adding Planned Services to an Individualized Employment Plan (IEP)/Individual Service Strategy (ISS)
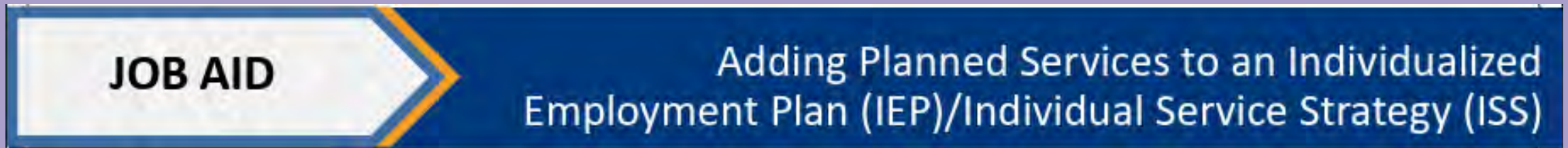
The following illustrates the end-to-end sequence of steps which Title I Staff take in CWDS to add a planned service to an existing IEP/ISS. This example uses a Dislocated Worker case. However, these same steps can be used for Adult, Youth, or Labor Exchange cases.

The Individual Employment Plan (IEP) and the Individual Service Strategy (ISS) in CWDS are being enhanced to enable staff to better serve and prepare Pennsylvania's job seekers for today's workplace. Staff users from all programs will now have one comprehensive view of a customer's IEP/ISS. Starting *October 5th*, staff users will only be able to access IEP(s)/ISS(s) in CWDS 2.0.

Benefits of the Enhanced CWDS 2.0 IEP/ISS

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Outcome: Better Customer Service & Participant Goal Achievement

Responsive Design
Enables staff interaction with CWDS 2.0 through desktops/laptops, tablets, and mobile devices

Enhanced Customer Engagement
Ensures that customers remain engaged by providing updates through their PA CareerLink® Dashboard

Customer-Centric
Supports staff to better meet customer goals by understanding customers' individual barriers, skills, interests, employment details, goals, and objectives in a single view

Increased Collaboration Across Programs
Allows all programmatic staff to collaborate around one active IEP/ISS

Creating a (Career) Planned Service for a Dislocated Worker

1 After logging onto the CWDS System, search for the desired participant from the *Participant Search* screen.

2 Select the **Participant** tile.

3 The *Participant Summary* screen displays. Scroll down to the *Plans* tile and select the **WF - IEP/ISS (Active)**.

4 *The Individual Employment Plan (IEP) / Individual Service Strategy (ISS)* screen displays. Select **Edit IEP/ISS**.

5 Scroll down to the *Objectives: Employment* section. Select **ADD PLANNED SERVICE**.
NOTE An *Objective* must be established prior to adding a *Planned Service*.

6 The *Planned Service* pop-up displays. Select **Basic Career Services** from the **SERVICE CATEGORY** dropdown list. Once selected, only *Basic Career Services* options display.

NOTE This example uses *Basic Career Services*, however, select the service category as appropriate.

7 Additionally, you can enter a specific service code in the *Search* Text box as an alternative way to populate the service. Locate the desired service and select **SELECT**.

8 The *Selected Planned Service* pop-up displays. Complete the required fields with the appropriate details for the planned service. Select **SAVE.**

Selected Planned Service

SERVICE
WCS01 - Basic Career Services - Staff-Assisted Job Search and Placement Assistance, Including Career Counseling

8

START DATE   ESTIMATED END DATE   ACTUAL END DATE
04/26/2023   04/26/2023

STATUS
Not Started

COMMENTS
Training for Job Aide

20 characters of 1000

8

CANCEL   SAVE & ADD ANOTHER   SAVE

9 The *IEP/ISS* screen displays. Scroll down to the *Objectives: Employment* section and expand the *Training* section by selecting the *Expand* icon ➕ .

Once expanded, verify that the added *Planned Service* is listed.

NOTE To edit information listed, select the **Edit** icon 📝

Objectives: Employment						
Objective ⇕	Begin Date ⇕	Estimated End Date ⇕	Actual End Date ⇕	Objective Status ⇕	Objective Manager ⇕	Actions
🚫 Training	04/05/2023	09/30/2024		In Progress	Amy Dunn	📝
		ADD PLANNED SERVICE				
Planned Service ⇕	Start Date ⇕	Estimated End Date ⇕	Actual End Date ⇕	Service Status ⇕	Comments ⇕	Actions
WCS01 - Staff-Assisted Job Search and Placement Assistance, Including Career Counseling	04/26/2023	04/26/2023		Not Started	View	📝 ✖

2 The *Planned Services* pop-up displays. From the *SERVICE CATEGORY* dropdown list select **Training Services**. Locate the desired *Training Services* from the generated list and select the **SELECT** option for that service.

3 The *Selected Planned Service pop-up* displays. Complete the required fields with the appropriate details for the planned service. Select **SAVE & ADD TRAINING.**

4 The *Training Program* pop-up displays. To add a *Training Program* to the *Planned Services* details, select the desired **Program Type** from the dropdown list. Scroll through the auto-populated courses, locate the desired course and select the **SELECT** option for that course.

5 The *Selected Training Program* screen displays. Input any relevant comments and select **SAVE**.

Selected Training Program

COURSE

CDL Class A - 160 Driving Academy

COMMENTS

Training for a CDL license

26 characters of 1000

5

CANCEL   SAVE

6 The *IEP/ISS* screen displays. Locate the *Objectives: Employment* section and view the added *training* by selecting the **Expand** icon ➕ .

Objectives: Employment

Objective ⬍	Begin Date ⬍	Estimated End Date ⬍	Actual End Date ⬍	Objective Status ⬍	Objective Manager ⬍	Actions
⊖ training	04/05/2023	09/30/2024		In Progress	Amy Dunn	📝

ADD PLANNED SERVICE

Planned Service ⬍	Start Date ⬍	Estimated End Date ⬍	Actual End Date ⬍	Service Status ⬍	Comments ⬍	Actions
WCS01 - Staff-Assisted Job Search and Placement Assistance, Including Career Counseling	04/25/2023	04/25/2023		In Progress	View	📝 ✖
➕ WTS01 - Occupational Skills Training	05/01/2023	12/15/2022		Not Started	View	📝 ✖

8 Verify the detailed information for the added *Training Planned Service*.

NOTE To edit dates or update information to reflect current provided services, select the **Edit** icon 📝 .

WTS01 - Occupational Skills Training	05/01/2023		12/15/2023		Not Started	View	⑧ 📝 ✕
Course Title ⬍		**Training Provider** ⬍		**Expected Outcome** ⬍	**Comments** ⬍		**Actions**
CDL Class A		160 Driving Academy		Occupational License	View		📝 ✕

9 Update *Dates* and *Status* if appropriate. Select **SAVE**.

Selected Planned Service

SERVICE
WTS01 - Training Services – Occupational Skills Training

START DATE	ESTIMATED END DATE	ACTUAL END DATE
06/05/2023 📅	12/15/2023 📅	📅

STATUS
In Progress ▾

COMMENTS
Training for future employment

10 characters of 1000

⑨

| CANCEL | | SAVE & ADD TRAINING | SAVE & ADD ANOTHER | SAVE |

The *IEP/ISS* screen displays. Locate the *Objectives: Employment* section and expand the *training* section by selecting the **Expand** icon ➕ .

The training service(s) display. Next, validate the edited service details for accuracy.

NOTE If updating a service to **Completed/Partially Completed,** select **SAVE & ADD TO SERVICE RECORD** SAVE & ADD TO SERVICE RECORD .

When this occurs, services auto-populate to reflect changes on the service record screen.

Objectives: Employment						
Objective ⇕	Begin Date ⇕	Estimated End Date ⇕	Actual End Date ⇕	Objective Status ⇕	Objective Manager ⇕	Actions
⊖ training	04/05/2023	09/30/2024		In Progress	Amy Dunn	✎
		ADD PLANNED SERVICE				
Planned Service ⇕	**Start Date** ⇕	**Estimated End Date** ⇕	**Actual End Date** ⇕	**Service Status** ⇕	**Comments** ⇕	**Actions**
WCS01 - Staff-Assisted Job Search and Placement Assistance, Including Career Counseling	04/25/2023	04/25/2023		In Progress	View	✎ ✖
➕ WTS01 - Occupational Skills Training	04/25/2023	12/15/2023	⑩	In Progress	View	✎ ✖

Confirming Services were added to the Service Record

NOTE The following example shows a **Completed Service**. The service record only reflects services that are **Partially Completed/Completed** when you select **SAVE & ADD TO SERVICE RECORD**.

The *Select Funding Stream and Services* screen displays. Complete the required fields. Select the radio button for the desired *Planned Service*. Select **Continue**.

The *Workforce Service Details* screen displays. Validate the required information for accuracy. Select Continue.

Workforce Service Details

Complete the details for each service and click the "Continue" button.
Required Fields are indicated by *

Participant(s) Case List

Participant ID	Participant	Case Id	Current Office	Case Status	Program(s)	Application Start Date
3480636	Mohn, JOAN d	21717802	PA CAREERLINK BRADFORD/SULLIVAN COUNTIES	Eligible	WIOA - Dislocated Worker	04/05/2023

Program Eligibility and Funding Streams

Program Eligibility: WIOA - Dislocated Worker
Funding Stream: Dislocated Worker Local
Course Name:

Staff-Assisted Job Search and Placement Assistance, Including Career Counseling (WCS01)

2 * Start Date(MM/DD/YYYY) [4] - [25] - [2023] Select Date

Contract Number #1 [_____] [Get Contract Number #1] [Clear Contract Number #1]

DWG Project ID [_____]

Contract Number [_____]

*Service Authorization Status [Authorized ∨]

0 characters of 1500

Comment [_____]

Job Site Code [_____]

LWIA Field1 [_____]

LWIA Field2 [_____] **2**

[Back To Select Services And Funding Stream] [Check Spelling] [Continue]

Completing Common Measures Information

NOTE The system displays the *Common Measures* screen. This screen only displays when program participation is triggered by the first value-added service. The system pre-populates screen information with information previously entered on a *Common Measures* or *WIOA Title I Application* screen. The information serves as a baseline and is reported to federal agencies.

Staff must complete the *Demographic, Employment, Education, Military Information and Factors that May Impact Obtaining or Retaining Employment, Migrant and Seasonal Farmworkers, Low Income/Public Assistance Information* sections.

Complete all required fields and select **SAVE & CONTINUE**.

2 The Common Measures Confirmation screen displays. Confirm the data for accuracy and select **SAVE & CONTINUE** SAVE & CONTINUE .

3 The Common Measure Outcomes screen displays. Scroll down and locate the *Verification* section(s) *(Employment, Education, Factors that May Impact Obtaining Or Retaining Employment Status, Low Income/Public Assistance Information)* to upload a verification source.

Select a **Standard Verification Source** from the dropdown list.
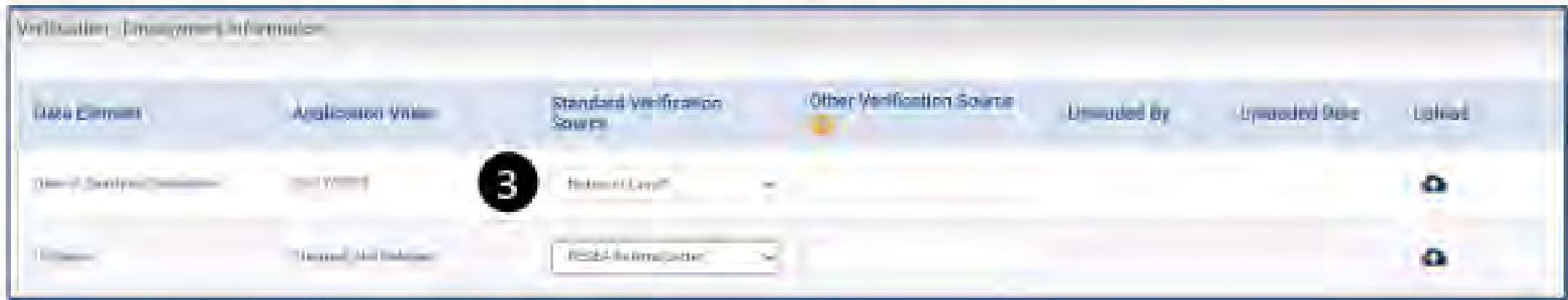
4 Select the **Upload** icon ☁.
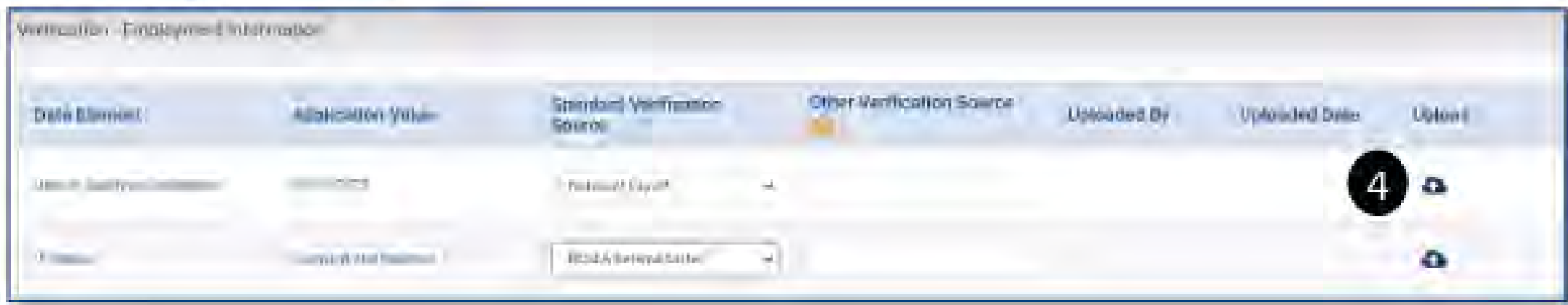
5 The *Upload Verification Source Document* pop-up displays. Locate the **DOCUMENT TITLE** text box and type in the name of the document to upload and select **Choose File.**

6 Select a verification document from the PC pop-up (only a **PDF** version will be accepted). Select **Open.**
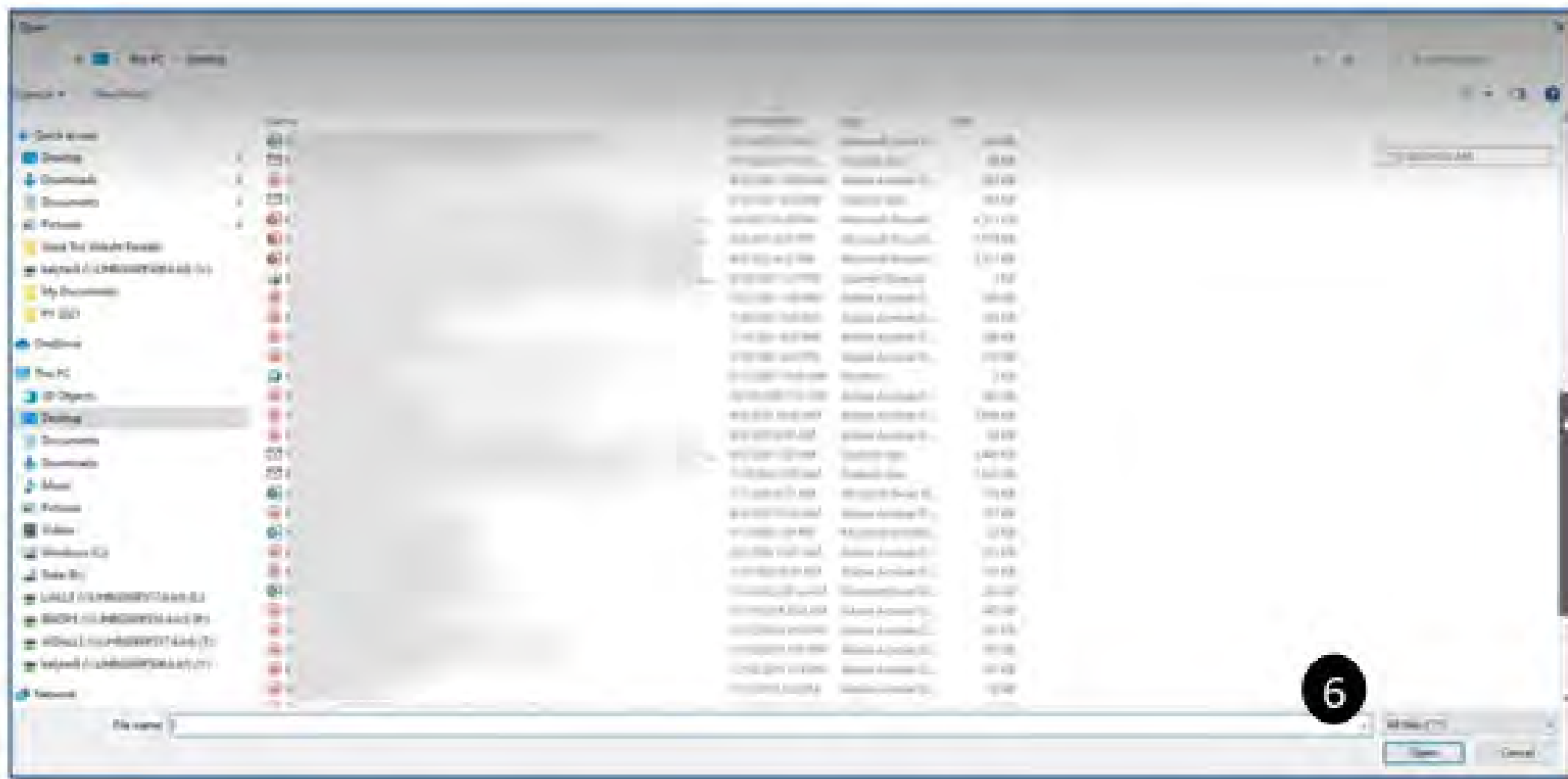
7

The *Upload Verification Source Document pop-up* displays. Select **UPLOAD**.

8

Locate the *Uploaded By* and *Uploaded Date* to verify that the document was successfully uploaded. Additionally, the icon changes to a Download icon ☁ .

NOTE All *Standard Verification Source* Documents are recommended to be uploaded and will be required in the future to be uploaded for data validation.

After all *Standard Verification Source* documents have been uploaded, scroll to the bottom of the screen and select **Confirm Documents** ~~CONFIRM DOCUMENTS~~ .

A *Document Confirmation pop-up* displays. Review the information for accuracy and select the **Confirmed** radio button. Select **SAVE.**
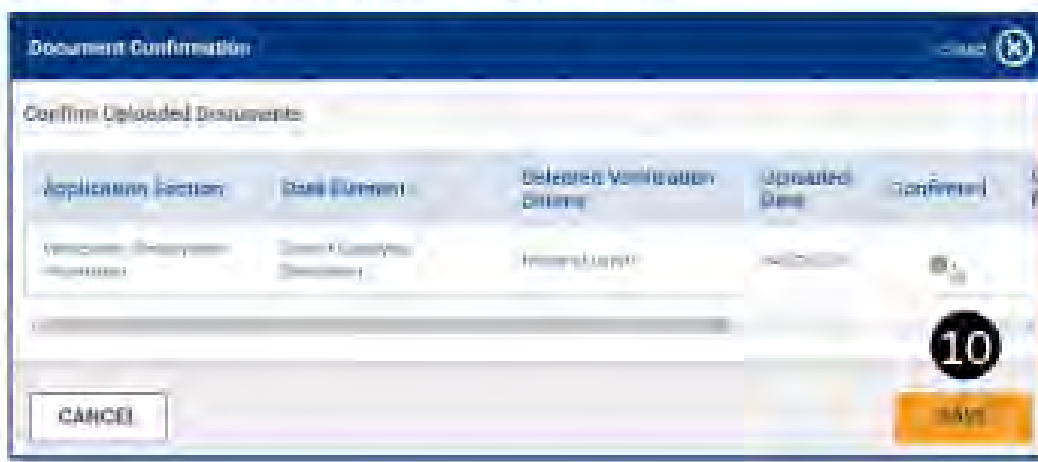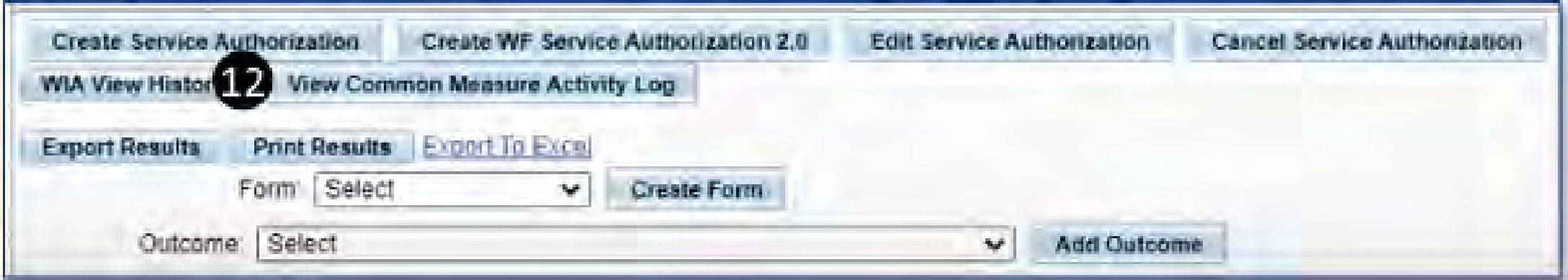

The *Common Measures* screen displays a message of validation.

Scroll to the bottom of the screen and select **SAVE** ~~SAVE~~ .

12 The *Participant Service Record* screen displays. Scroll to the bottom of the screen and select **View Common Measure Activity Log**.
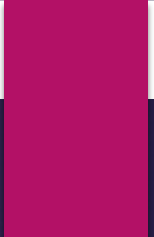

13 The *Common Measures Program Activity Log* screen displays. Locate the corresponding E01 Link for the appropriate program under View Common Measures to view the information on the CWDS 2.0 screen.

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2

Adding a Training Service to the Service Record

From the Left Navigation Pane, select **Summary**.
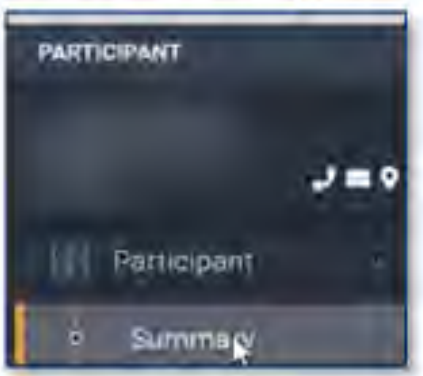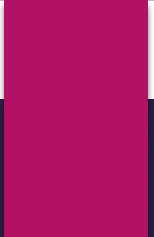

Next, select **WF- IEP/ISS (Active)**

3

The *Individual Employment Plan (IEP) / Individual Service Strategy (ISS)* screen displays. Select **EDIT IEP/ISS**

4 Locate the *Objectives: Employment* section and expand the *training section* by selecting the Expand icon ➕ .

5 Locate the *Training Service* and select the **Edit** icon 📝 .

The system auto-populates the *Planned Service* box. Scroll to the *Selected Planned Service* section and update the **STATUS** to reflect **Partially Completed** or **Completed** then select **SAVE & ADD TO SERVICE RECORD** to continue.

NOTE The *STATUS* must be *Updated* for **SAVE & ADD TO SERVICE RECORD** to become active to select.

7 The system auto-populates the *Funding Stream and Services* screen. Locate the *Program Eligibility and Funding Streams* section. From the *Funding Stream* dropdown list, select the appropriate **Funding Stream**. Locate the desired service and select the radio button. Select **Continue**.

The system auto-populates the **Workforce Service Details** screen. Complete the *required* information. Select **Continue.**

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Complete the details for each service and click the "Continue" button

Required Fields are indicated by *

Participant(s) Case List

Participant ID	Participant	Case Id	Current Office	Case Status	Program(s)	Application Start Date
3480636	Mohn, JOAN d.	21717802	PA CAREERLINK BRADFORD/SULLIVAN COUNTIES	Participating	WIOA - Dislocated Worker	04/05/2023

Program Eligibility and Funding Streams

Program Eligibility: WIOA - Dislocated Worker
Funding Stream: Dislocated Worker Local
Course Name:

Occupational Skills Training (WTS01)

*Start Date(MM/DD/YYYY) 4 - 25 - 2023 Select Date

*Estimated End Date(MM/DD/YYYY) 12 - 15 - 2023 Select Date

*Established ITA or Contract for Services ITA

*Course/Program Information: CDL A Truck Driver Training Course
Course/Program Information

Institution Name 160 Driving Academy

PA Institution Code

CIP Code 490205 Truck & Bus Driver/Commercial Vehicle Operator & Instructor

*Get O*NET Occupation Heavy and Tractor-Trailer T | Get O*NET Code | Clear O*NET Code

O*NET Code 53-3032.00

*Hours Per Week 20

*Pell Grant Recipient No

Contract Number #1 | Get Contract Number #1 | Clear Contract Number #1

DWG Project ID

Contract Number

*Service Authorization Status Authorized

0 characters of 1500

Comment

Job Site Code

LWDA Field 1

LWDA Field 2

*Cost $ (999,999,999.00) 4000

Standard Verification Source	Other Verification Source	Verification Source
Select		Upload

Back To Select Services And Funding Stream | Check Spelling | Continue

9 The system auto-populates the **Workforce Service Details Confirmation** screen. Select **Save and Finish.**

Back   Save And Finish

10 The system returns to the *IEP/ISS* screen. To confirm the service was added successfully, select **Service Auths** from the Left Navigation Pane.
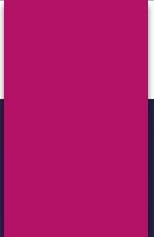
The system auto-populates the **Participant Service Record** screen. To validate the addition of the training service, scroll to the *Service Authorization Search Results* and locate the newly added Training Service.