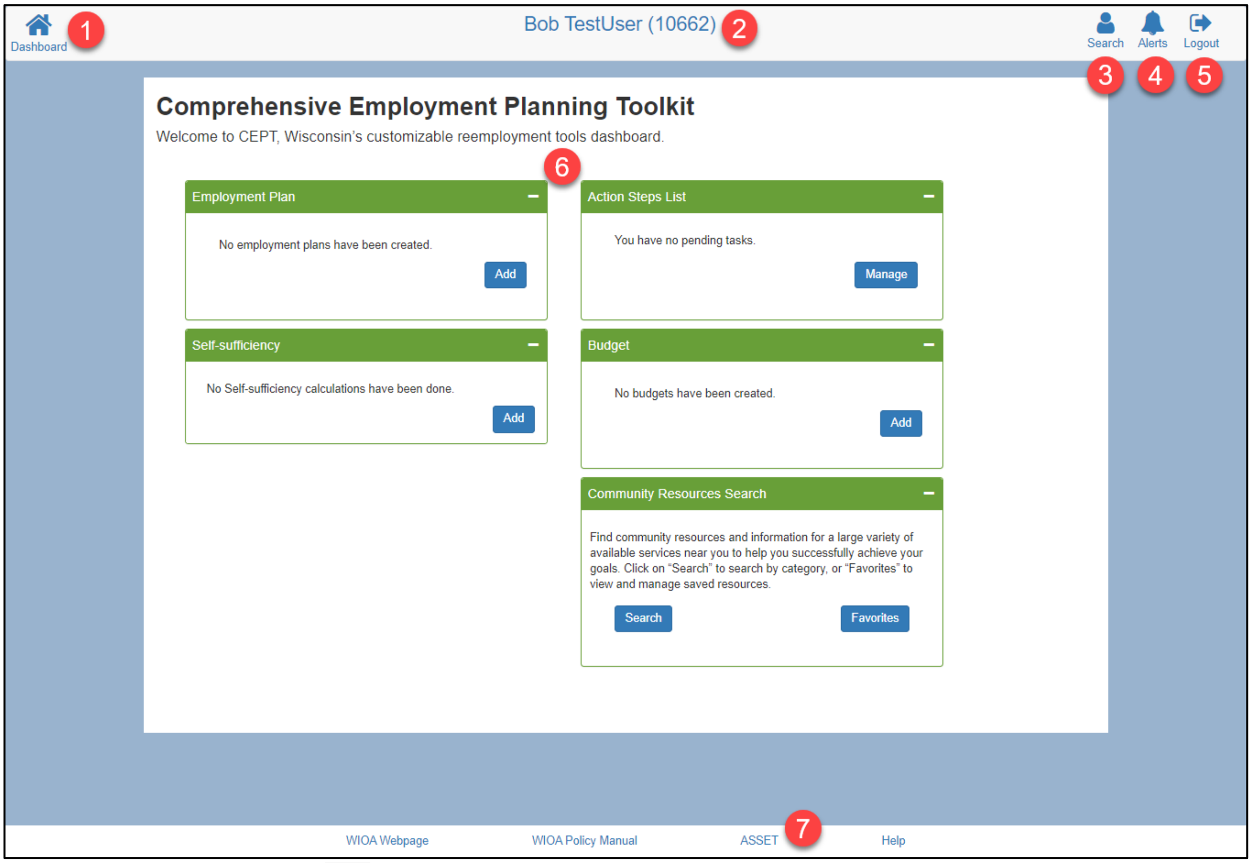
# Comprehensive Employment Planning Toolkit (CEPT) Reference Manual

# Contents

## Navigation




1) The "Home" icon takes you back to the career planner's dashboard.

2) Clicking on the participant's name will bring you back to the participant's main page, the same page as the picture above.

3) The "Person" icon takes you to the participant search page.

4) The "Bell" icon takes you to the career planner's notifications page.

5) The "Logout" icon logs you out of CEPT.

6) Each item on participant's page is an individual tool in CEPT. Select a tool to get started.

7) The footer contains helpful links. The ASSET link will open the ASSET application, while the other links will take you to relevant resources including the WIOA Title I webpage, the WIOA Title I online policy manual, and CEPT help resources.

**Note** – Do not use the browser "Back" and "Forward" buttons to navigate in CEPT, only use the navigation icons provided. If you accidently use the browser navigation buttons, you will need to reload the page to see the correct information.

## Notifications and Alerts

CEPT has built in notifications and alerts to help you manage your caseload.

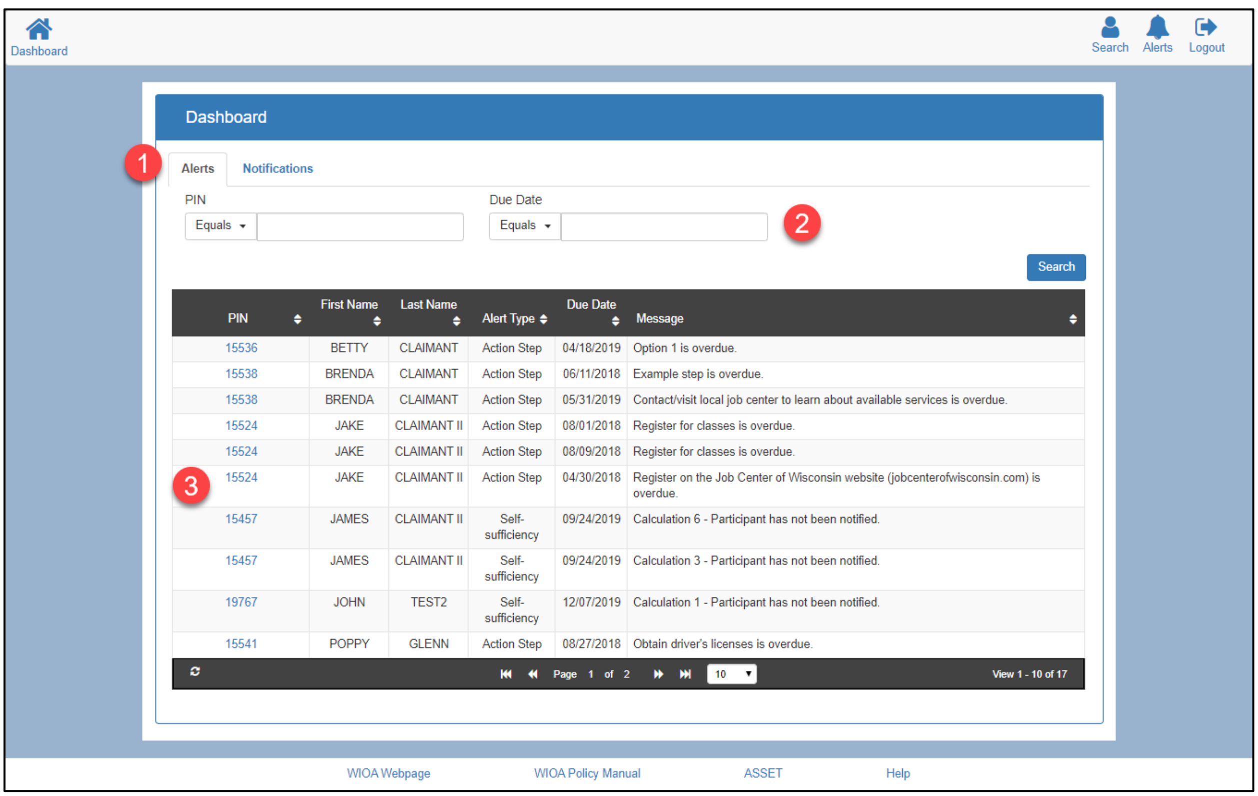
**Notifications** are informational items that you may want to be aware of, but don't need to take any action. These include:

- Participants sharing a budget with staff
- Participants signing off on an employment plan
- Participant sharing a Self-sufficiency calculation
- Participants accepting or rejecting a Self-sufficiency calculation

**Alerts** are items that need some action from you or the participant. These include:

- Services associated with an employment plan that were planned but never started
- Action steps associated with a plan that are overdue
- Pending Self-sufficiency calculations where the participant has never been notified

Alerts will disappear from your list once the item has been addressed, while Notifications remain to provide you with a historic record of events.




1) Use the "Alerts" and "Notifications" tabs to navigate between the two lists.
2) You can filter the list by the participant's "PIN" or "Due Date."
3) Clicking on the PIN will take you to the relevant Action Step, Self-sufficiency calculation, or budget. The only items that you cannot directly navigate to are overdue services in ASSET.

# Finding CEPT on My JCW

Job seekers and participants can access several of the CEPT tools through My JCW.

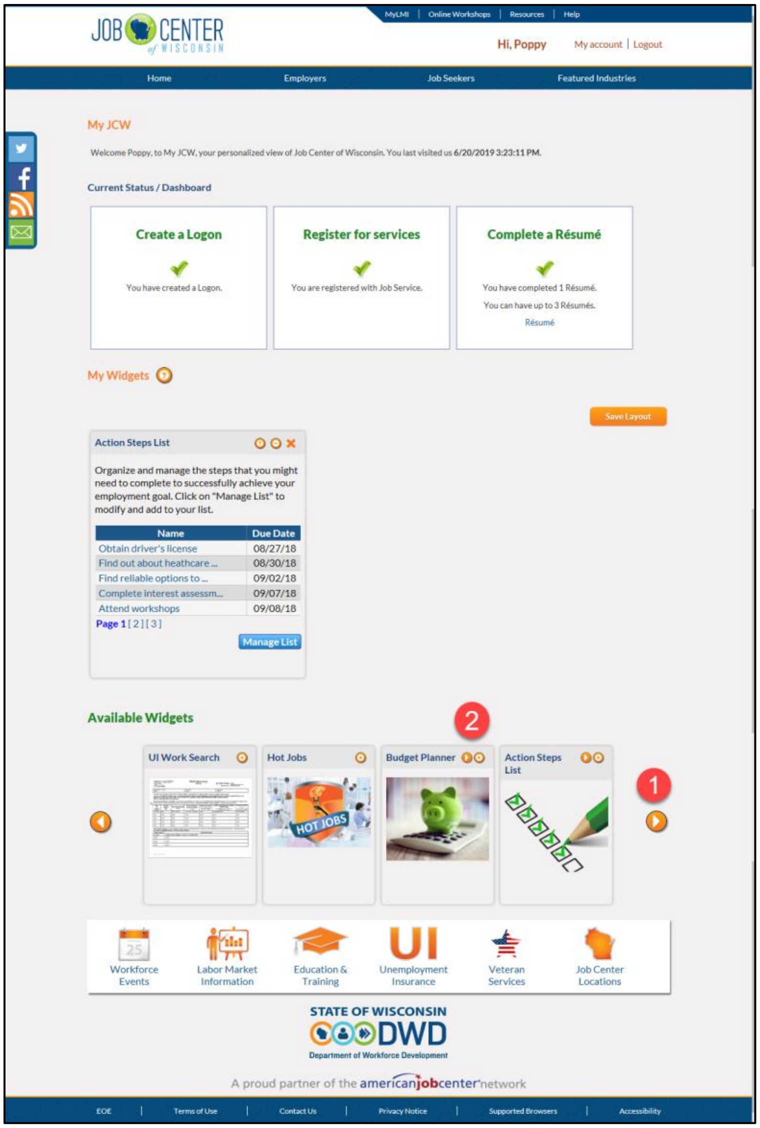
**Note:** Help videos have been created for the Budget Planner, Action Steps List and Career Exploration tools. These videos can be accessed by clicking the "Question Mark" icon  within each tool, or by going to http://wisconsinjobcenter.org/jcw/help_myjcw.htm.

To access the tools in My JCW, users need to do the following:


1) Log into JCW.
2) Hover over the Job Seeker menu.
3) Click on "My JCW."

Once a user opens My JCW, they will select the tools from the "Available Widgets" section at the bottom of the screen.

To use a tool, the user must first add the tool widget to "My Widgets." To add a tool to "My Widgets:"




1) Click on the "Arrow" icons  to the left and right of the widgets to scroll through the list of available tools.
2) Add widgets to the "My Widgets" section by "dragging and dropping" them, or by clicking on the "Plus" icon  in the top corner of the widget.

**Note:** Users can access help videos for some of the tools by clicking the "Question Mark" icon  on the top right of the widget after they have selected the tool.

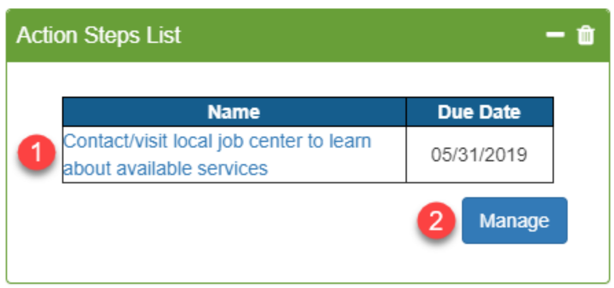
## Action Steps List

The Action Steps List is a tool to help you and your participants identify, organize and manage the actions they might need to complete to achieve their employment goals. The Action Steps List in CEPT is connected to the participant's Action Steps List on JCW, so both you and the participant can create and update action items.

The items on the Action Steps List also trigger notifications and emails to help you and the participant stay on track (see Notifications and Alerts section). Every Monday, JCW sends participants an email letting them know which action steps are overdue, and which are coming up in the next seven days. Similarly, CEPT creates notifications of action steps that your participants have missed.

<u>Action Steps – Widget</u>

The Action Steps List widget is located on the participant's page. Once action steps have been created, the widget will display the next five due items.



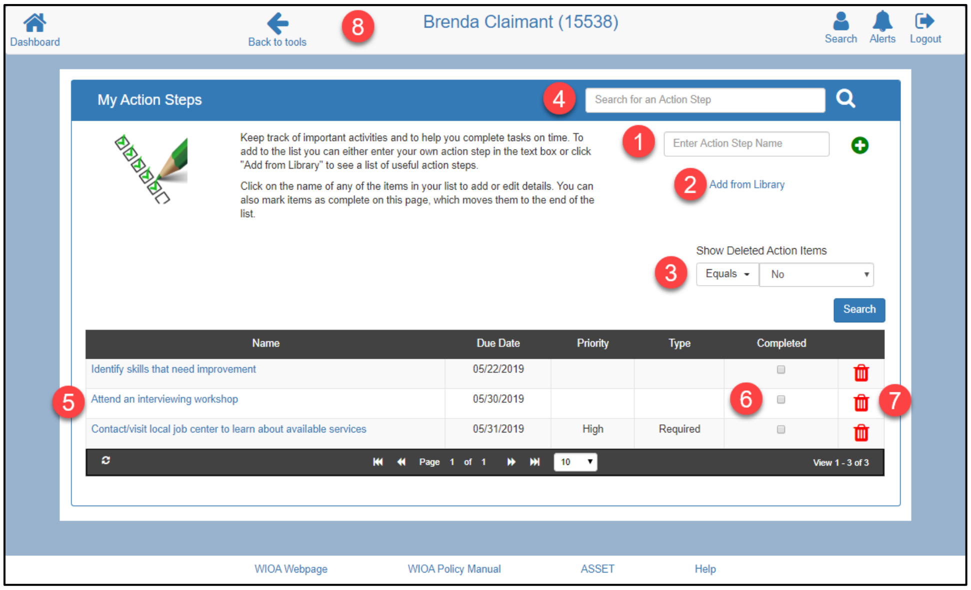

- You can click on the name of an individual action step to open a details window for that specific step.
- Click "Manage" to go to the Action Steps List.

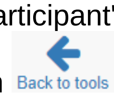
## Action Steps – Managing the List

The Action Steps List is where you can add, edit, and remove individual action steps.

**Items to Note:**

- You cannot remove action steps that have been associated with an employment plan from the list.
- Completed items are moved to the bottom of the list.




1) Add an action by entering the step's name and clicking "enter" on your keyboard or the "Plus" icon .
2) "Add from Library" leads to a list of predefined action steps. From the library you will be able to select and add multiple action steps to the list.
3) You can see deleted items by changing the "Show Deleted Action Items" dropdown to "Yes" and clicking "Search."
4) You can search for individual items in the Action Steps List. This field is defaulted to "contains," so it will find any items that contain the text you enter.
5) Click on an individual action step to see and modify its details.
6) You can click on the "Completed" check box to indicate that an action step has been completed.
7) You can delete an action step by using the "trash can" icon .
8) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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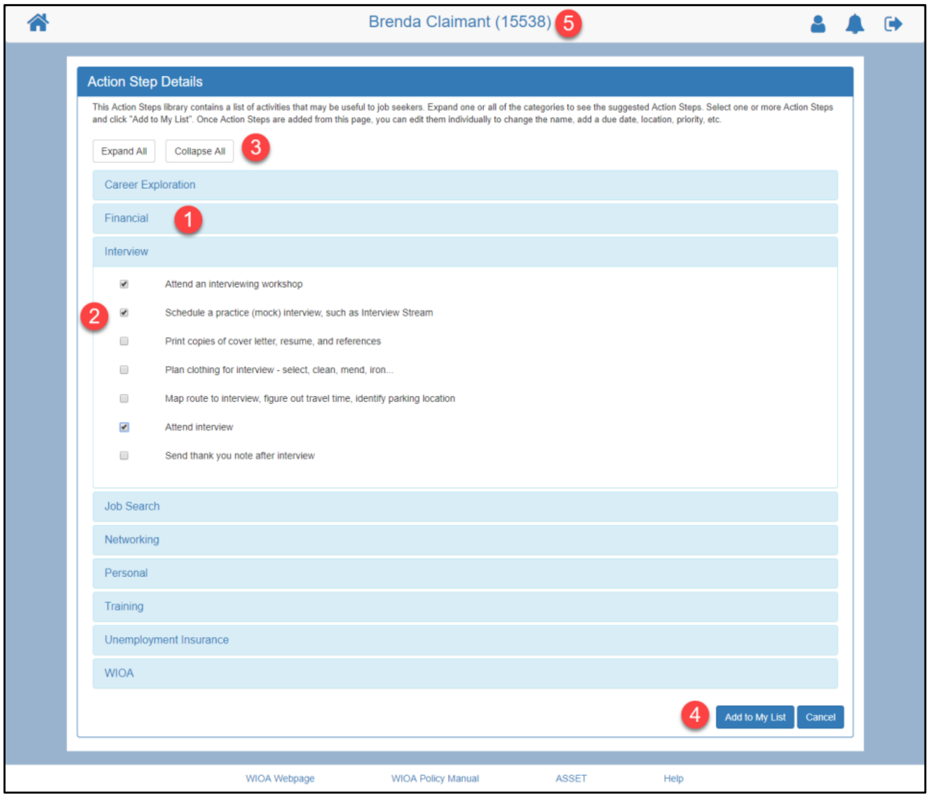
## Action Steps – Library

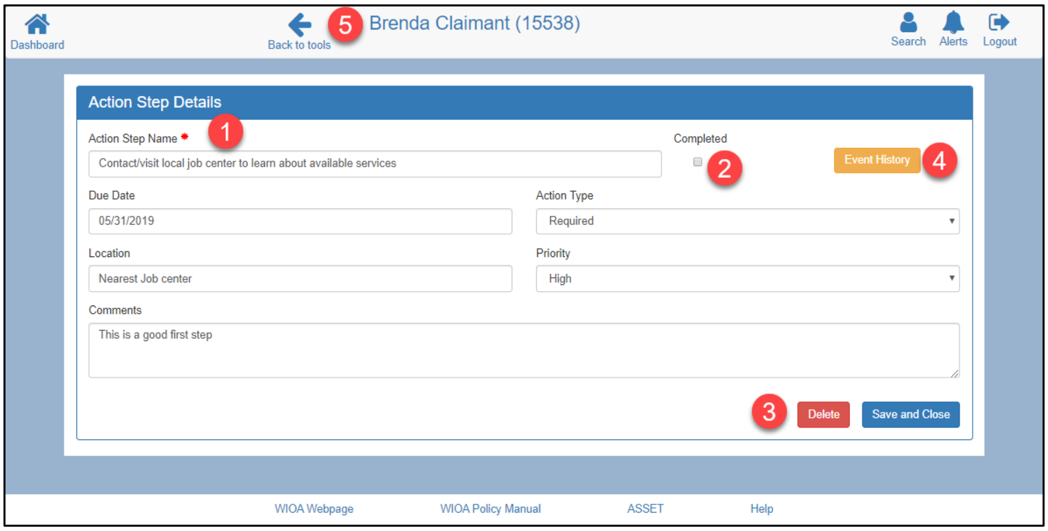
The Action Steps Library is a list of useful action steps that fall into nine predefined categories. From this page you can select and add one or more action steps to the list. Once an action step has been added to the participant's list, you will be able to modify and customize the action step's name.

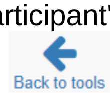



1) Click on the category name to see the available action steps.
2) You can select one on more action steps to add to the Action Steps List.
3) You can expand or collapse all the categories in the library.
4) "Add to My List" adds all the selected action steps to the list. "Cancel" navigates you back to the Action Steps List without adding any items.
5) Click on the participant's name to go back to the participant's main page.

## Action Steps – Details

You can modify all the details of an action step. On the details page, you can set a due date, add priority, determine the type of action step, identify if it has been completed, and input other useful information. From this page you can also delete the action step if it is not needed.




1) The "Action Step Name" is the only required field.
2) You can identify if an action step has been completed.
3) "Save and Close" will save any of the changes you have made. "Delete" will remove the action step. Both buttons will navigate you back to the Action Steps List.
4) You can see a history of all the changes to an action step by clicking "Event History."
5) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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# Employment Plan

The Employment Plan tool helps career planners:

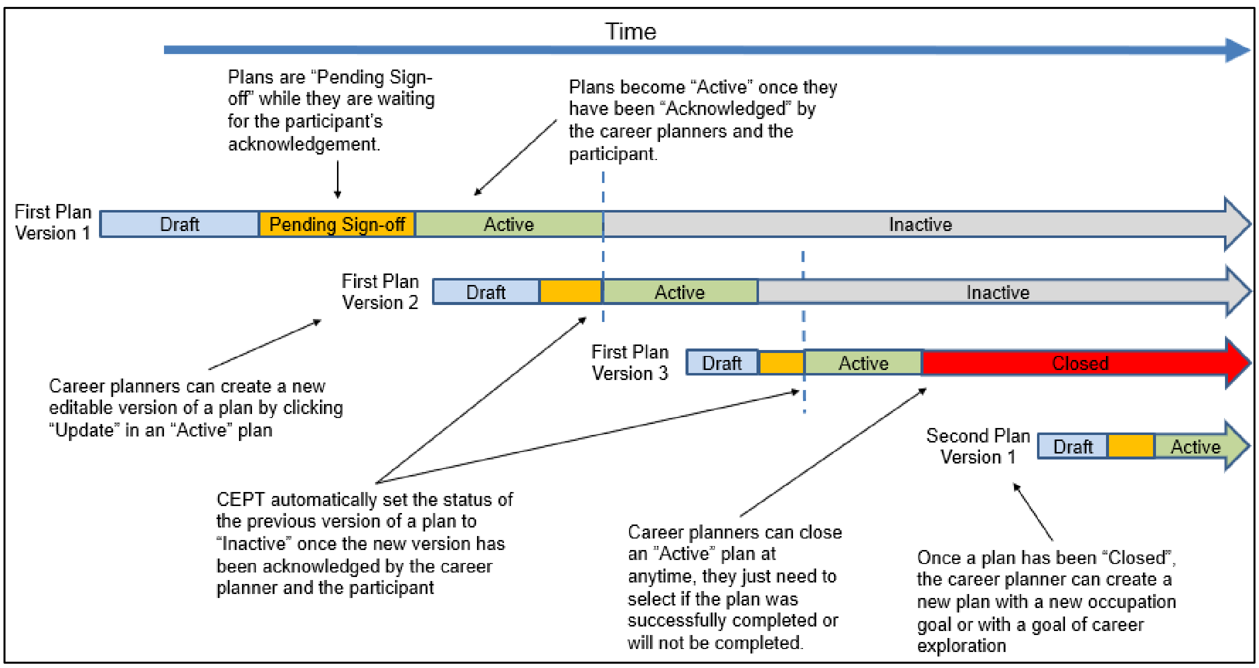
- develop and record a participant's career goal(s);
- identify any barriers that may impact the plan;
- complete a Job Fit Review that compares the participant's skills with the identified career goal;
- identify the services plan and action steps that support the goal; and
- electronically approve the plan with the participant.

Employment Plan – Versions

The CEPT Employment Plan tool supports the idea that plans are living documents that are modified and updated to meet the ever-changing needs of the participant. In CEPT, career planners can create and store multiple versions of a participant's employment plan. Each participant can only have one "Active" plan and one "Draft" version of a plan at any time.

The diagram below gives a high-level explanation of Employment Plan versioning and statuses.

**Note:** The first version of a plan is always considered "Version 1."



Employment Plan – Statuses

Employment plans in CEPT go through five statuses during their life cycle.

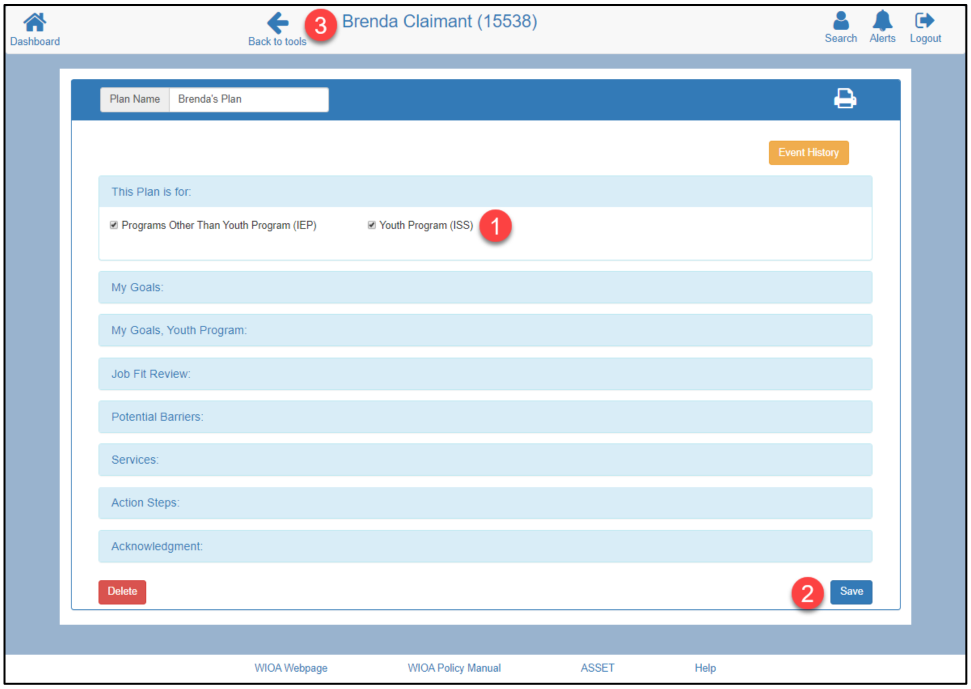
- **Draft** – This is the editable version of an employment plan. It is where the career planner and participant identify goals, gaps, and barriers; plan program services; and assign action steps.
- **Pending Sign-off** – This is the status of a plan after the career planner has acknowledged a draft plan and is awaiting the participant's acknowledgement. Plans cannot be edited when they are pending sign-off, but the career planner can put the plan back in "Draft" status by canceling their acknowledgement (see Employment Plan – Acknowledgement section).
  - *Note:* Once a career planner acknowledges a plan, a notification email is sent to the participant letting them know that they can review and sign-off on their plan in the My JCW section of Job Center of Wisconsin.
- **Active** – This is the status of the plan once both the career planner and participant have acknowledged the plan. Plans cannot be edited once they are "Active." However, career planners can create a new "Draft" version of an "Active" plan (see Employment Plan – Reviewing or Updating a Plan section).
- **Inactive** – Once a career planner and participant have acknowledged a plan, if there is a previous "Active" version of the plan, CEPT sets it to "Inactive." Inactive plans are historic snapshots of previous versions of employment plans and cannot be edited or modified.
- **Closed** – Career planners can permanently "Close" plans by selecting the plan outcome and clicking "Close Plan" in an "Active" plan. Once a plan has been closed it can no longer be edited or updated (see Employment Plan – Closing an "Active" Plan section).

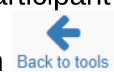
**Important Items to Note:**
Employment plans must have an occupation goal, or "Career Exploration" defined as a goal before they can be acknowledged (see Employment Plan – This Plan is for

This is the section of the plan where career planners identify the program(s) that is/are represented on the plan. Currently the options are:

1. Programs Other Than Youth Program (IEP) – This option is for any program, other than WIOA Title I Youth Program.
2. Youth Program (ISS) – This option is for the WIOA Title I Youth Program.

Career planners can choose all appropriate options for a participant.

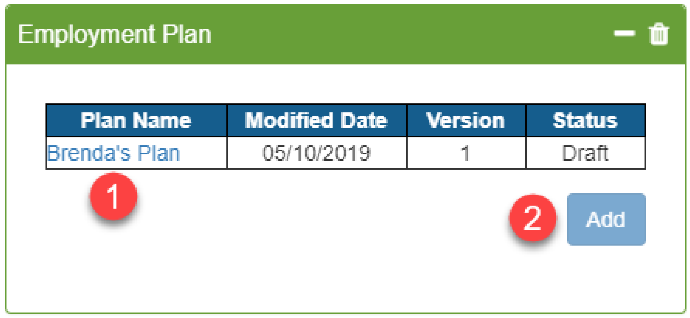



1) In the "This Plan is for:" accordion, select the options that are appropriate for your participant.
2) Click "Save" to save any pending changes.
3) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon  .

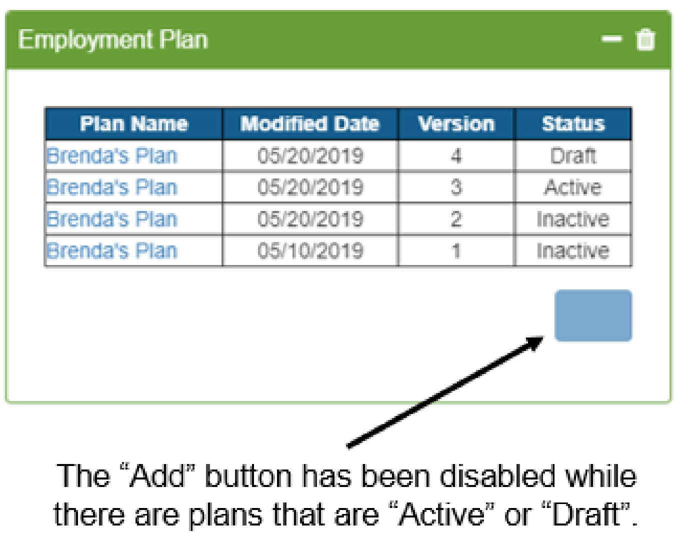
- Employment Plan – My Goal section).
- For plans that are for "Programs Other Than Youth Program (IEP)," if there are O*NET Tasks, Skills and Knowledge associated with an occupation goal, the Job Fit Review must be completed before the employment plan can be acknowledged (see Employment Plan – Job Fit Review section).

Employment Plan – Widget

The Employment Plan widget shows all the plans that have been created. You can only have one "Draft" in development and only one "Active" plan.



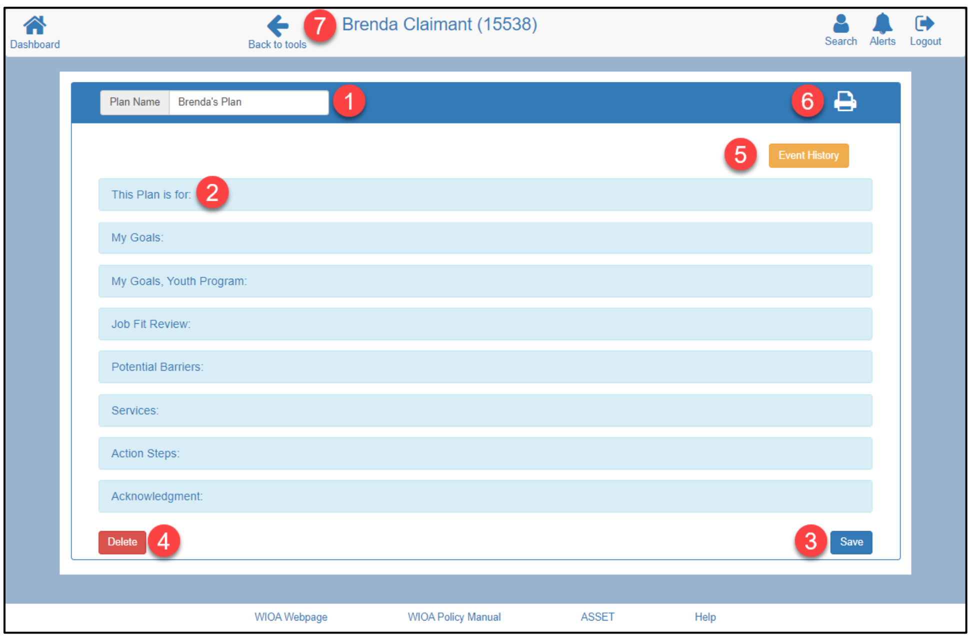

1) The table shows a list of all the employment plans that have been created. On the table, you will see the plan's name, the last date on which it was modified, the version number of the plan and its status. Clicking on the "Plan Name" will take you to the details of the plan.
2) Click "Add" to create a new plan. Once you have a "Draft" or "Active" plan, you can no longer create a new plan until the active plan has been "Closed."

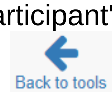


## <u>Employment Plan – Details</u>

The employment plan is made up of eight sections:

- This Plan is for – where you identify the program(s) for which you are creating the plan;
- My Goals – where you identify the participant's goals for non-youth programs;
- My Goals, Youth Program – where you identify the goals for the youth program;
- Job Fit Review – where you can assess how the participant's capabilities fit the "Tasks," "Skills" and "Knowledge" statements of the O*NET occupation goal;
- Potential Barriers – where you identify any barriers that might make it challenging for the participant to achieve the employment goal;
- Services – where you associate ASSET services with the plan;
- Action Steps – where you associate Action Steps with the plan;
- Acknowledgement – where you and the participant electronically "sign off" on a plan.




1) You can change the name of the employment plan to fit your needs.
2) Click on each of the individual sections to see the details of that section.
3) Click "Save" to save any changes on the plan.
4) Click "Delete" to delete the plan. You can delete a plan while it is still in "Draft" status, but not after it has become "Active," "Inactive," or "Closed."
5) You can see a history of all the changes to an employment plan by clicking "Event History."
6) The "Print" icon  lets you print the plan.
7) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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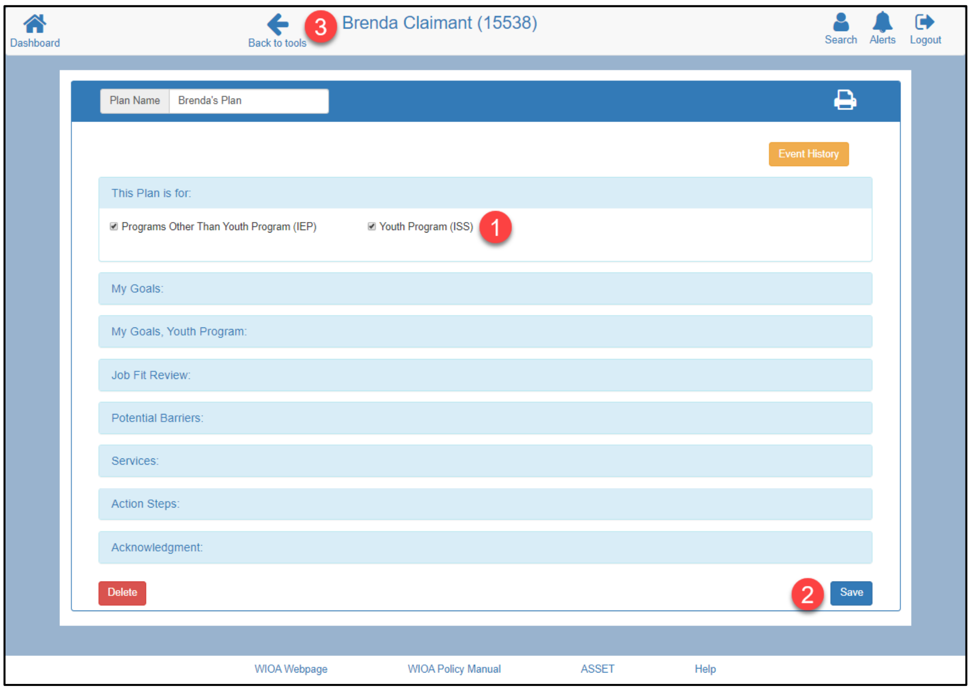
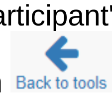
<u>Employment Plan – This Plan is for</u>

This is the section of the plan where career planners identify the program(s) that is/are represented on the plan. Currently the options are:

4. Programs Other Than Youth Program (IEP) – This option is for any program, other than WIOA Title I Youth Program.
5. Youth Program (ISS) – This option is for the WIOA Title I Youth Program.

Career planners can choose all appropriate options for a participant.

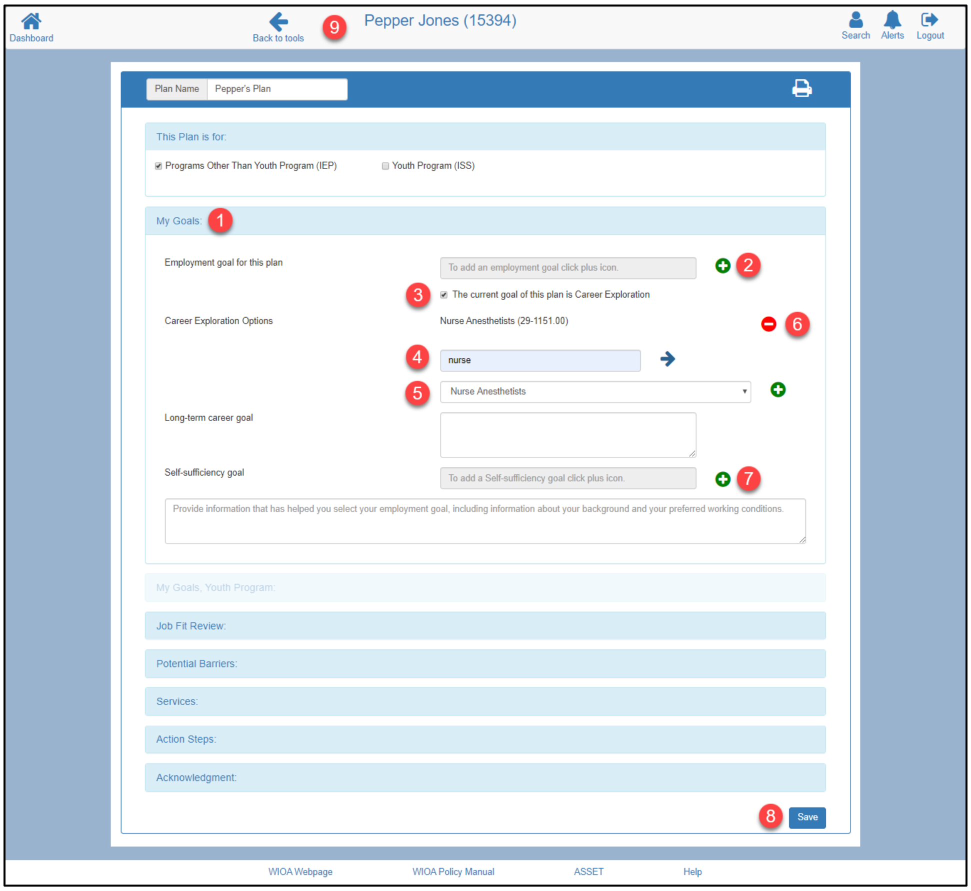



4) In the "This Plan is for:" accordion, select the options that are appropriate for your participant.
5) Click "Save" to save any pending changes.
6) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon .

## Employment Plan – My Goals

The "My Goals" section of the plan lets you define the participant's employment goal. Employment plans can either specify an occupation or career exploration as a goal. While the primary driver of the CEPT Employment Plan should be the employment goal, career exploration provides an opportunity for participants to explore options before selecting a specific employment goal.

**Note:** Once there is an "Active" plan with a specific occupation goal, career planners can no longer select career exploration as a goal.

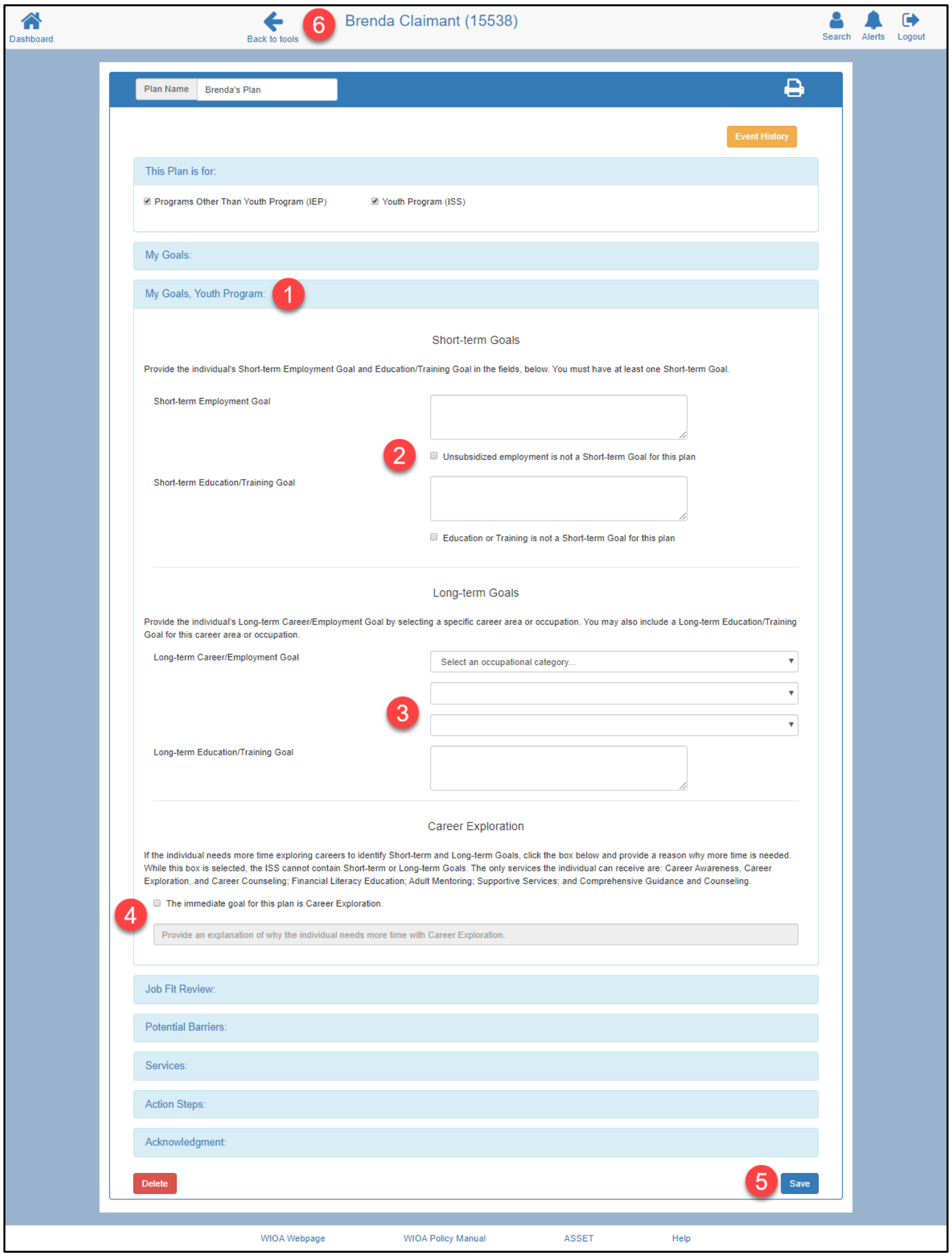



1) Click on "My Goals" to expand the goals section of the plan.
2) The "Plus" icon near the "Employment goal for this plan" takes you to the "Favorite Occupations" list, where you can select an occupation to associate with the plan.
3) If the plan is being developed for career exploration, you can select "The current goal of this plan is Career Exploration." This will remove any employment goal that has been associated with the plan. Once this is selected, you have the option to identify up to three occupations that the participant may be exploring. To add an occupation:
4) Enter the occupation title that the participant may be interested in exploring in the text box that appears, and then click that "Arrow" icon .

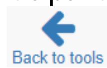
5) Select the occupations that relate to the title in the search textbox from the dropdown list, and then click the "Plus" icon to add it to the list.
6) Once it is in the list you can click the "Minus" icon to remove the occupation.
7) The "Plus" icon near the "Self-sufficiency goal" takes you to the list of saved self-sufficiency calculations, where you can select a calculation to associate with the plan.
8) Click "Save" to save any pending changes.
9) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon.

## Employment Plan – My Goals, Youth Program

The "My Goals, Youth Program" section of the plan lets you define a youth participant's employment and education goals. When filling out this part of the plan, career planners either complete the Short-term Goals and Long-term Goals section, or the Career Exploration section. The system will not allow you to acknowledge the employment plan if these sections are not completed.




1) Click on "My Goals, Youth Program" to expand the goals section of the plan.
2) For Short-term Employment Goal and Short-term Education Goal, fill in the appropriate text or check box. Both the Employment Goal and Education/Training Goal are required to acknowledge the plan.

3) In the Long-term Education/Training Goal, career planners can identify the "Occupational Category," "subcategory," and "occupation." Only the "Occupational Category" and "subcategory" are required to acknowledge the plan.
4) The Career Exploration section is an alternative to identifying Short-term and Long-term Goals. If a career planner identifies that "The immediate goal of this plan is Career Exploration" by selecting the checkbox, they must provide an explanation in order to acknowledge the plan.
5) Click "Save" to save any pending changes.
6) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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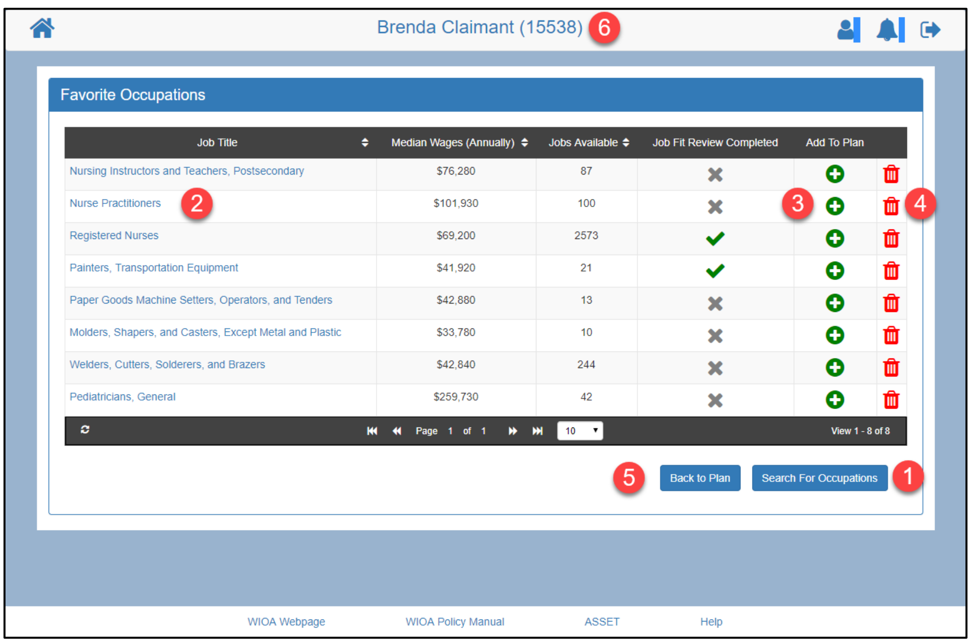
Employment Plan – Favorite Occupations List

The "Favorite Occupations" list is a shared list between the career planner and participant, which stores all the occupations which may be of interest to the participant. From this list career planners can:

- Search for occupations to add to the list;
- Review LMI information about an occupation; and
- Associate an occupation with an employment plan.

Participants can access their version of the "Favorite Occupations" list through the "Career Exploration" widget on the My JCW section of JCW. When a participant uses the tool in JCW and adds a favorite occupation to their list, it is visible to their career planner. Similarly, if a career planner adds an occupation to this list in CEPT, it is visible to the participant in My JCW.

**Important Note:** Participants can complete Job Fit Reviews for occupations that have been added to the "Favorite Occupations" list on My JCW. The results of the Job Fit Review will be accessible to the career planner once the occupation has been associated with an employment plan (see Employment Plan – Job Fit Review section).



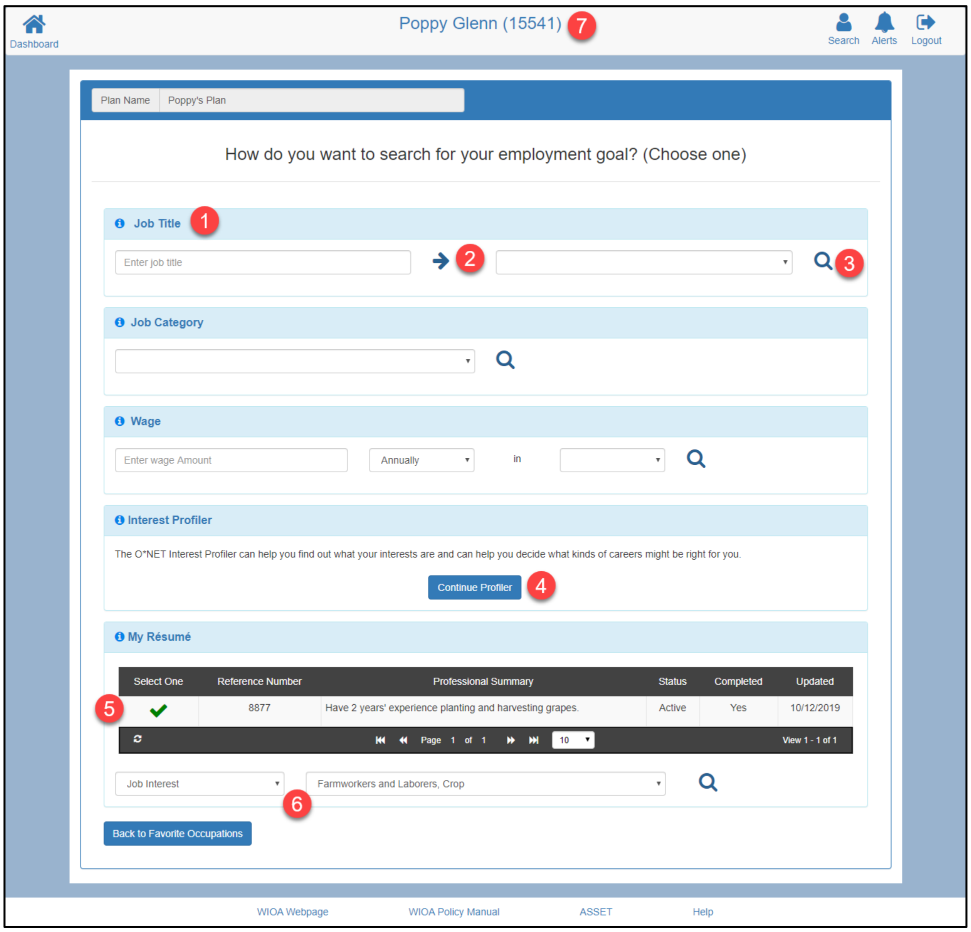

1) To search for occupations to add to the "Favorite Occupations" list or to the employment plan, click "Search for Occupations."
2) Clicking on the "Job Title" will open the relevant Skill Explorer page for the occupation. On the list you can also see the median statewide wages for the occupation, number of jobs available on JCW, and whether the participant has completed a Job Fit Review. The "X" icon indicates that a Job Fit Review has not been completed and the "Check" icon indicates a completed Job Fit Review.
3) You can associate an occupation goal with a plan by clicking the "Plus" icon .

4) You can remove occupations from this list by clicking the "trash can" icon . You cannot remove occupations that have been associated with an employment plan.
5) You can go back to the employment plan by clicking "Back to Plan."
6) Click on the participant's name to go back to the participant's main page.

Employment Plan – Search for Occupations

There are five ways to search for occupations:

- Job Title – where the system provides suggestions for an occupation you enter.
- Job Category – which provides a drop-down list of two-digit SOC occupation categories.
- Wage – where career planners can specify the minimum median wage desired and county.
- Interest Profiler – where a career planner can use the O*NET Interest Profiler to identify occupations that might suit the participant.
- My Résumé – A career planner can use completed JCW résumés to search by the Job History and Job Interest identified by the participant.




1) Click on the search option to see the relevant fields.

2) In "Job Title" click on the "Arrow" icon to see the suggestions for the job title you entered.

3) In all search options, except for "Interest Profiler" click the "Magnifying Glass" icon to see the results.

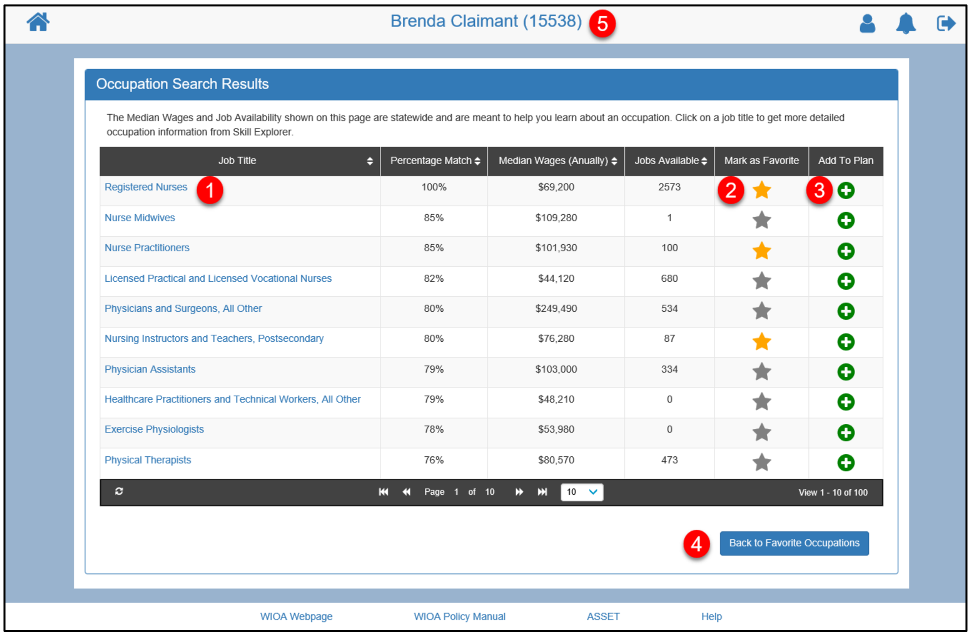
4) Click on "Start Profiler" or "Continue Profiler" to search by the O*NET Interest Profiler.

5) To search by Résumé, click on the gray "check" icon. Once a resume is selected, the check icon will turn green and a new dropdown will appear.

6) From the first dropdown select "Job Interest" or "Job History", once the second dropdown appears, you can select the occupation to use as the search criteria.
7) Click on the participant's name to go back to the participant's main page.

## Employment Plan – Occupation Search Results

You can find the results of an occupation search on the "Occupation Search Results" page. Here you can further explore the occupation, add occupations to the participant's favorite occupation list, or directly associate an occupation to a plan.



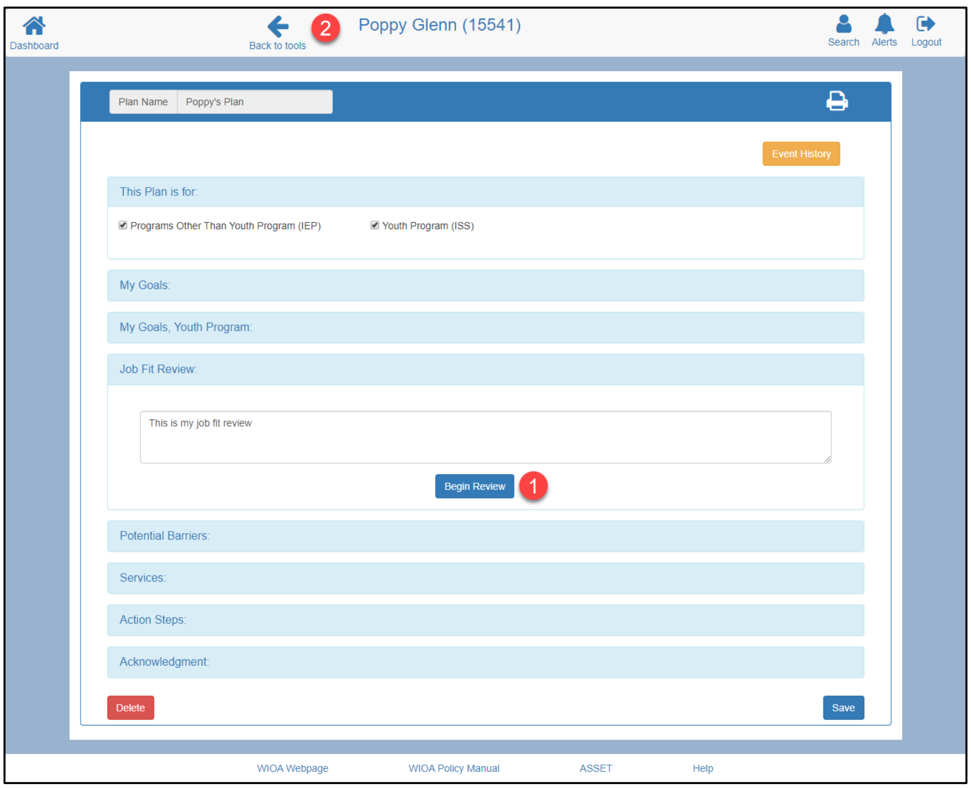

1) You can click on the "Job Title" to open the relevant Skill Explorer page. The table also contains the median statewide wage for the occupation and the number of job openings on JCW.
2) You can click on the "Star" icon to add a job to the participant's "Favorite Occupations" list. Items with yellow "Star" icons are already on the list and clicking the icon will remove the occupation from the list.
3) Clicking on the "Plus" icon will add the occupation to the "Favorite Occupations" list and associate it with the employment plan. This will navigate you back to the Employment Plan.
4) "Back to Favorite Occupations" will take you back to the "Favorite Occupations" list.
5) Click on the participant's name to go back to the participant's main page.

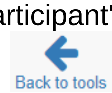
## Employment Plan – Job Fit Review

The Job Fit Review lets you rate the participant's comfort, skill level, and knowledge for the O*NET Task, Skills and Knowledge of the goal occupation you selected. The questions for each of the categories varies by the goal occupation selected. Not all O*NET occupations have associated Task, Skills and Knowledge.

**Important Notes:**

- If there are O*NET Tasks, Skills and Knowledge associated with an occupation goal, the Job Fit Review must be completed before the employment plan can be acknowledged.
- The Job Fit Review can either be completed by the career planner in CEPT, or by the participant in JCW. Using the "Career Exploration" widget in the My JCW section of JCW, a participant can complete a Job Fit Review for any occupation in the "Favorite Occupations" list. Unlike on CEPT, on JCW the participant does not have to complete the full assessment on one sitting; they can save their progress and continue the review another time. A career planner will have access to the participant's Job Fit Review once that occupation has been added to an employment plan.




1) Click on "Begin Review" to start the Job Fit Review.
2) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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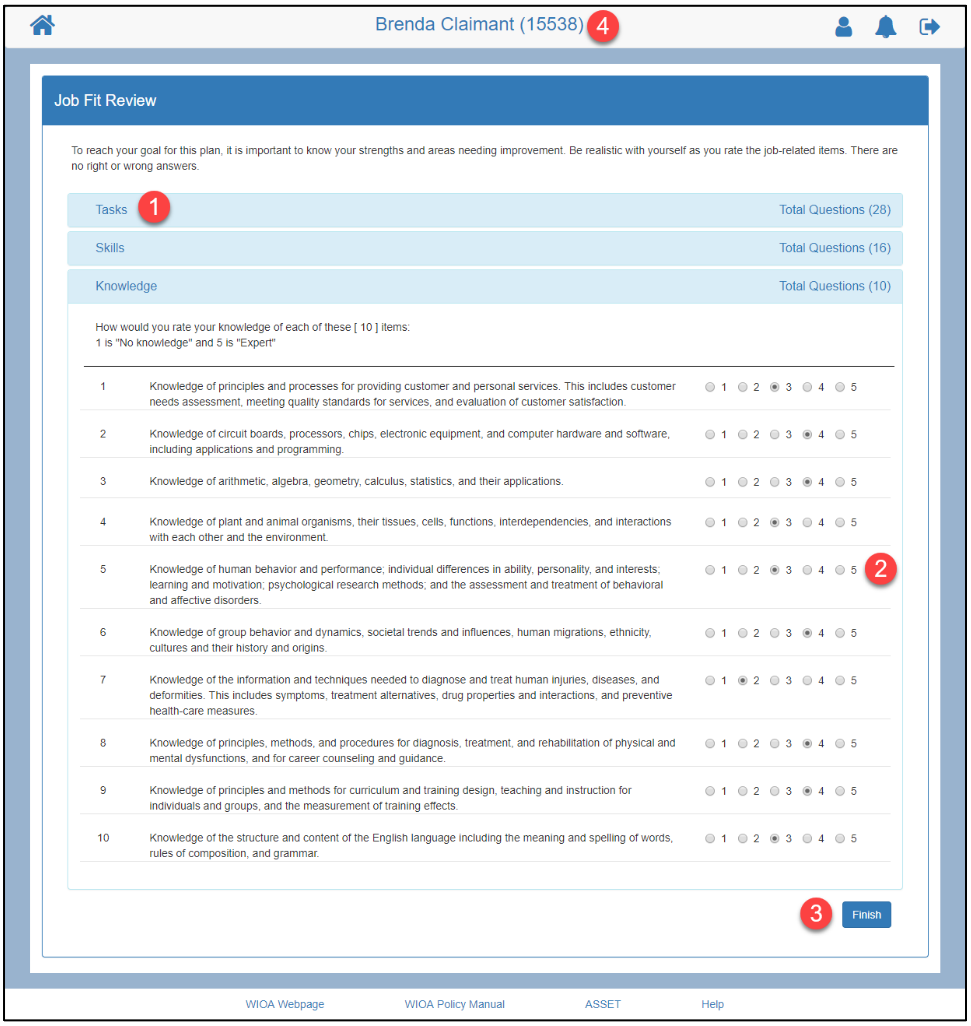
## Employment Plan – Job Fit Review Assessment

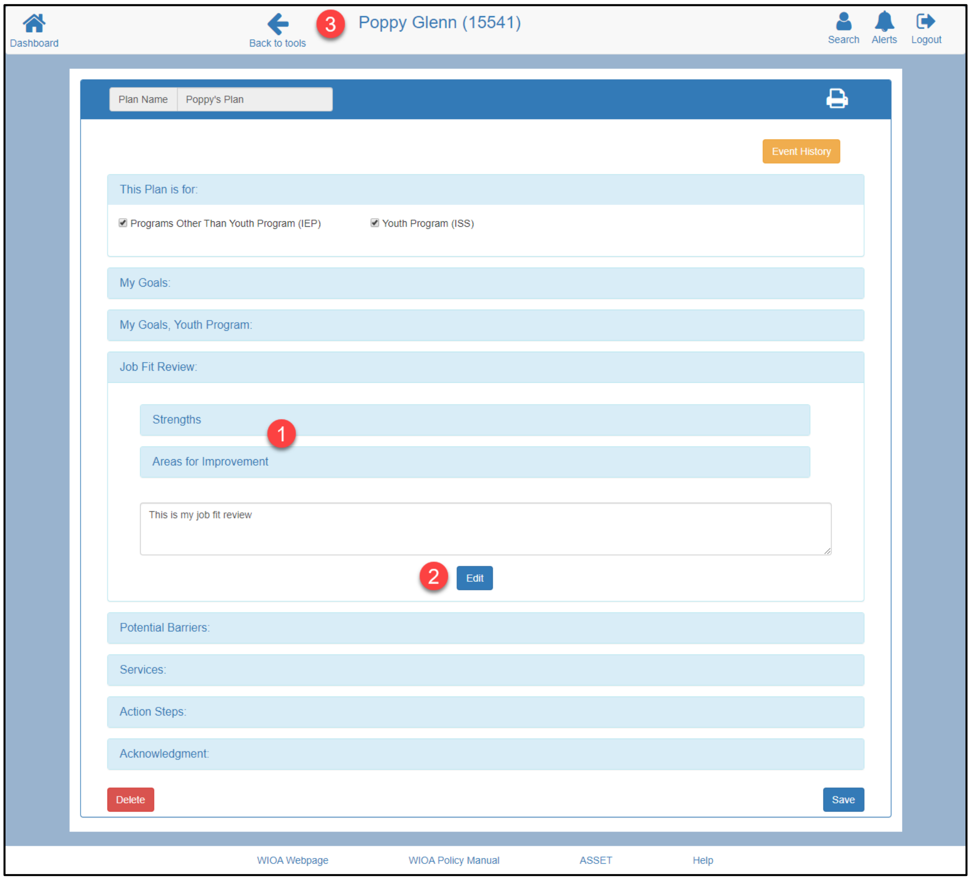
The Job Fit Review Assessment is broken up into three sections, the Tasks, Skills, and Knowledge. The number of questions in each category varies by the goal occupation that was selected. You will need to complete the full assessment to save the results.

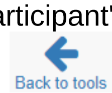



1) The accordion header shows the number of total questions. Clicking on the accordion's name expands it, so you can see the items that need to be rated.
2) Rate each item on a scale of 1 to 5. All items must be rated in order to save the review.
3) Click "Finish" once you have completed the review. This will navigate you back to the employment plan.
4) Click on the participant's name to go back to the participant's main page.

## Employment Plan – Completed Job Fit Review

Once a Job Fit Review has been completed, items rated 4 or 5 will appear on the employment plan as "Strengths," and items rated 1 to 3 will appear as "Areas for Improvement." Job Fit Reviews can be updated in CEPT while the plan is in "Draft" status. Once the plan is "Active" participants can only update the Job Fit Reviews through the "Career Exploration" tool in JCW.




1) Click on the accordions to see the identified "Strengths" and "Areas for Improvement."
2) Click "Edit" to update any of the responses to the Job Fit Review.
3) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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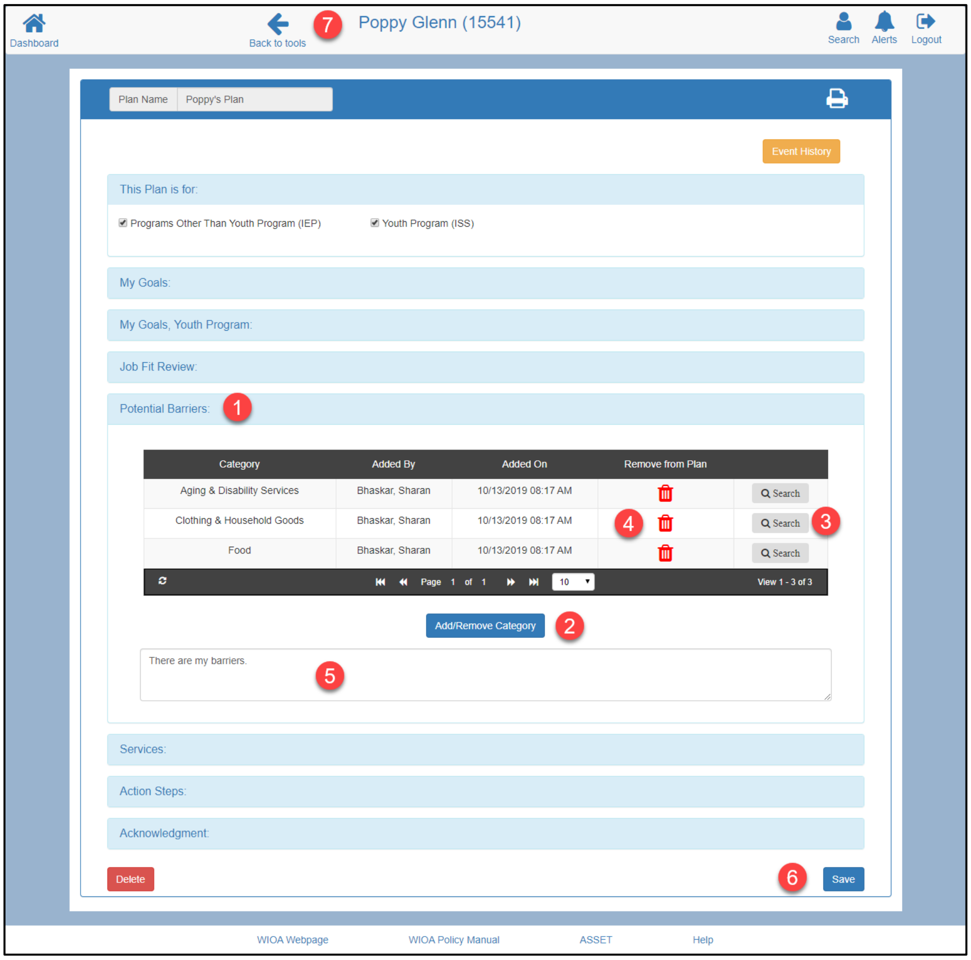
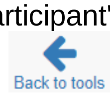
## Employment Plan – Potential Barriers

The Potential Barriers section lets career planners identify any barriers that may be relevant to the participant. The list of potential barriers comes from United Way 211's Taxonomy of Human Services (https://211taxonomy.org/), which is endorsed by the Alliance for Information and Referral Systems (AIRS), United Way Worldwide, the National Association of State Units on Aging, and the Public Library Association. Since the list may not contain all the possible needs of participants, career planners can use the text box to provide more narrative.




1) Click on the "Potential Barriers" header to open the accordion.
2) Click on "Add/Remove Category" to associate a potential barrier to the plan.
3) If you want to recommend any resources to the participant, you can click on "Search" to open the search page of the Community Resources tool (see Community Resources – Community Resources Search section). From here you will be able to add relevant resources for the participant to explore on JCW.
4) To remove a potential barrier from the plan, click on the "trash can" icon .
5) Enter any additional information about potential barriers to employment.
6) Click "Save" to save any changes.
7) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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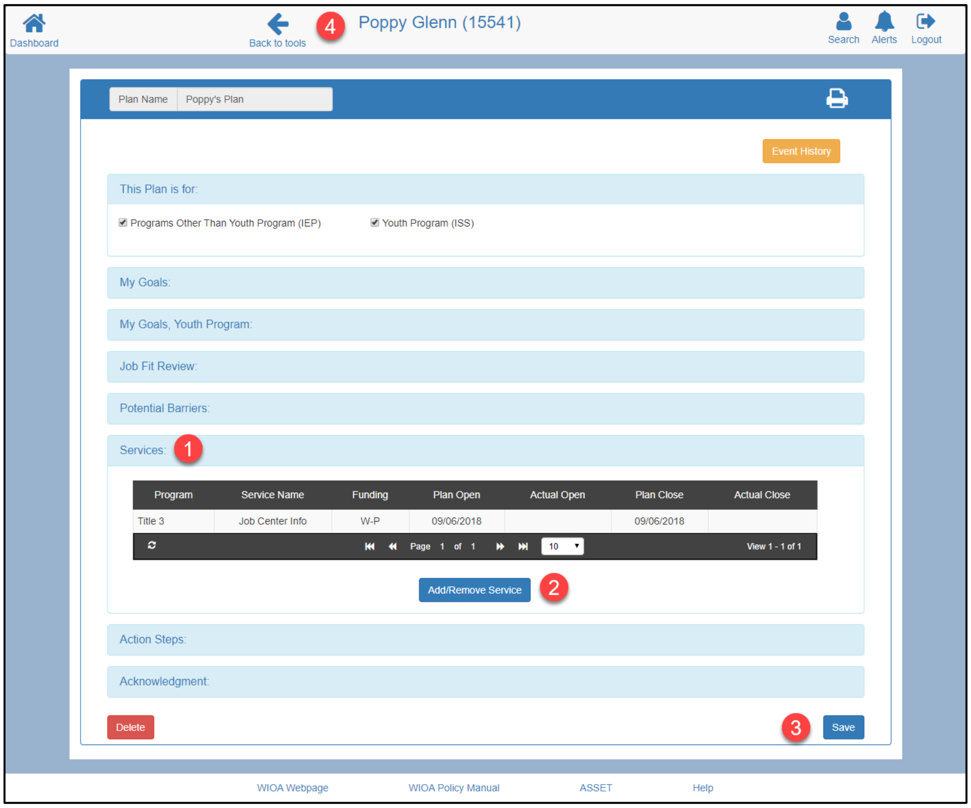
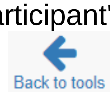
## Employment Plan – Services

Career planners cannot add services directly in CEPT; services must be added in ASSET. The "Services" section of the employment plan allows career planners to associate relevant services that were added in ASSET to a participant's employment plan. Any changes to the service dates in ASSET will be reflected on the employment plan.




1) Click on the "Service" accordion to expand the section.
2) Click "Add/Remove Services" to open a list of services currently in ASSET.
3) Click "Save" to save any changes to the plan.
4) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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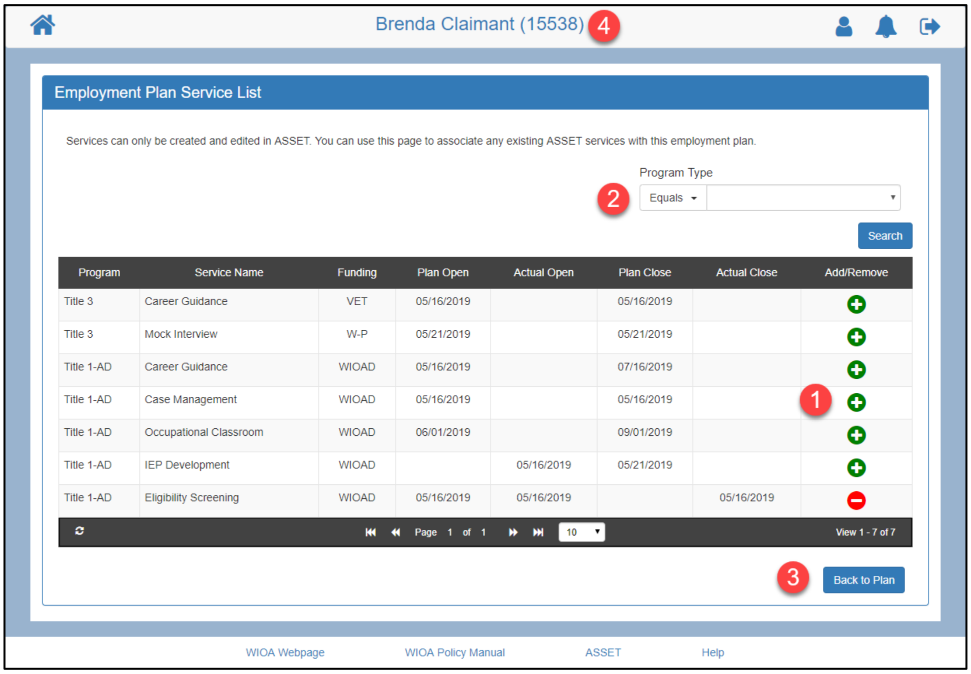
Employment Plan – Employment Plan Service List

The listed services are the same as those that have been created in ASSET. The list will contain any service created for Title I Adult, Youth, or Dislocated Worker; TAA; Wagner-Peyser; or Vets. You cannot create any services in CEPT; they can only be created in ASSET.

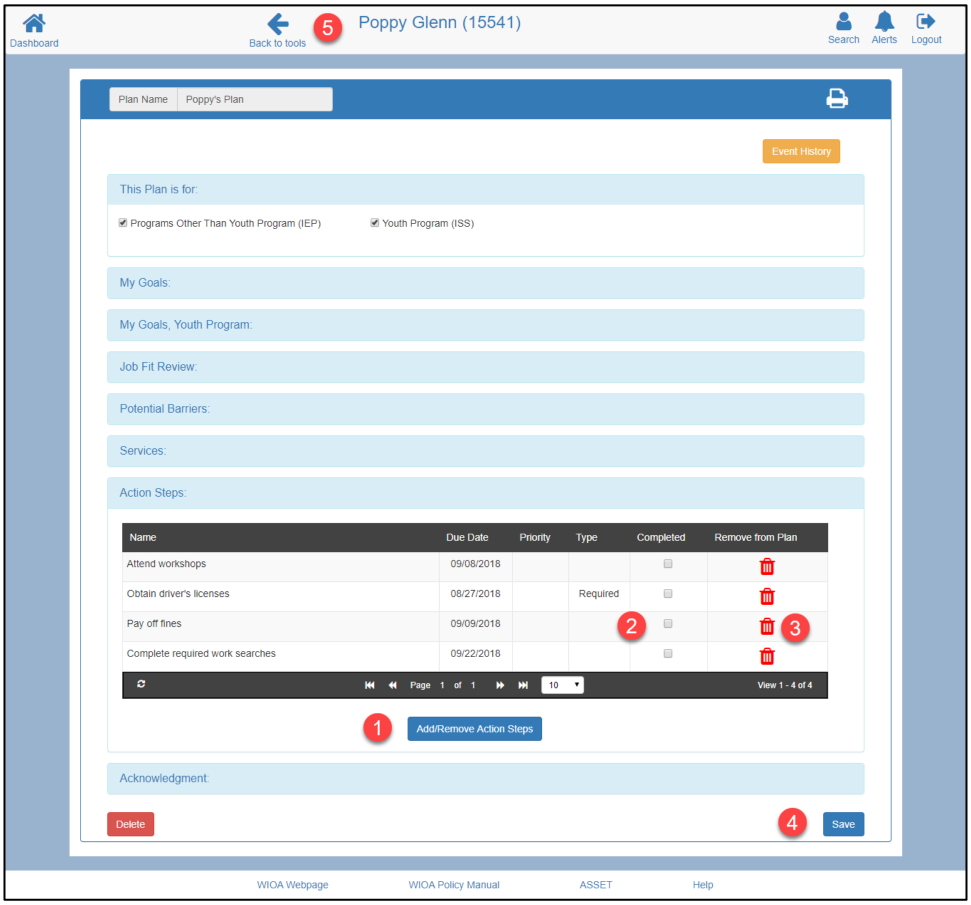



1) Clicking on the "Plus" icon  will associate the service to the employment plan.

   Clicking on the "Minus" icon  will disassociate the service from the employment plan.
2) The "Plan Type" drop down lets you filter the list of services by Title 1, Title 3, TAA, or Incumbent Worker.
3) Clicking "Back to Plan" will take you back to the employment plan.
4) Click on the participant's name to go back to the participant's main page.

## Employment Plan – Action Steps

Action steps are the actionable items that help lead the participant toward the goal of the employment plan. Action steps cannot be added directly through the employment plan; they need to be created in the "Action Steps List" tool and associated with the employment plan. Through JCW, the participant can update the status of an action step and indicate when a step has been completed.

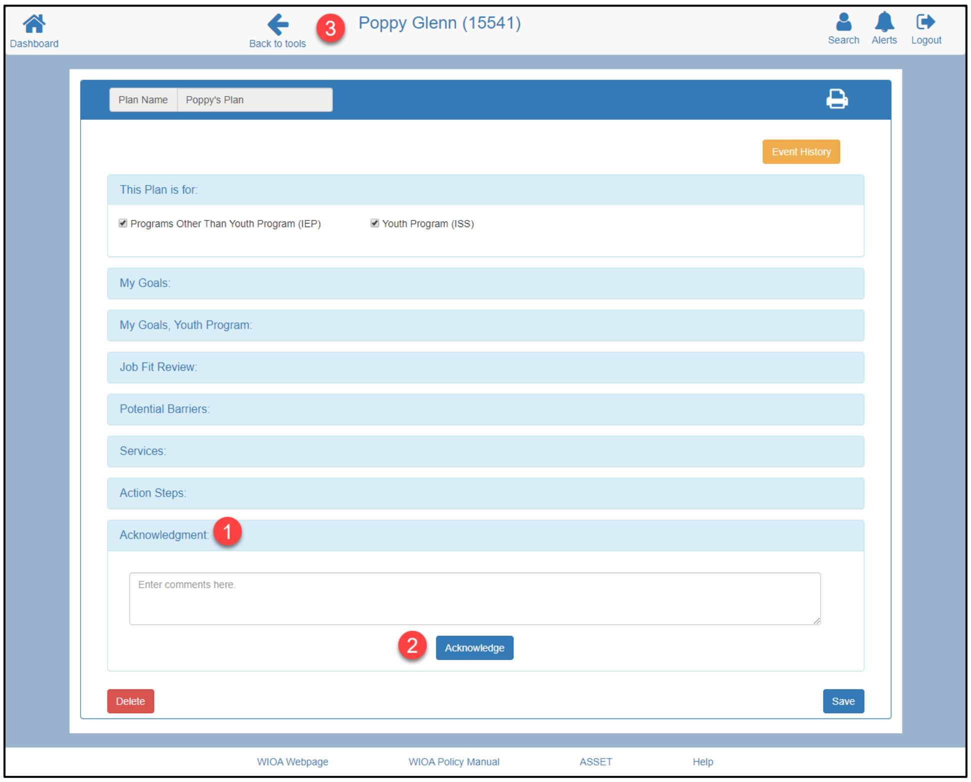


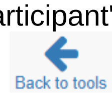

1) Click "Add/Remove Action Step" to open the Employment Plan Action Steps list.
2) The checkbox indicates if an action step has been completed or is still pending .
3) You can remove action steps from the plan by clicking the "trash can" icon .
4) Click "Save" to save any changes.
5) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon .

## Employment Plan – Acknowledgement

The CEPT Employment plan allows both the career planner and participant to electronically acknowledge a plan. Once both the career planner and the participant acknowledge the plan it becomes "Active." The career planner initiates the acknowledgement by clicking the "Acknowledge" button. Once the career planner has acknowledged the plan:

- it becomes read-only;
- an acknowledgement timestamp is added;
- the status is change from "Draft" to "Pending Sign-off"; and
- an email notification is generated to the participant informing them that they need to go to JCW and acknowledge their version of the employment plan.




1) Click on the accordion to see the "Acknowledgement" section.
2) Click "Acknowledge" to acknowledge the plan.
3) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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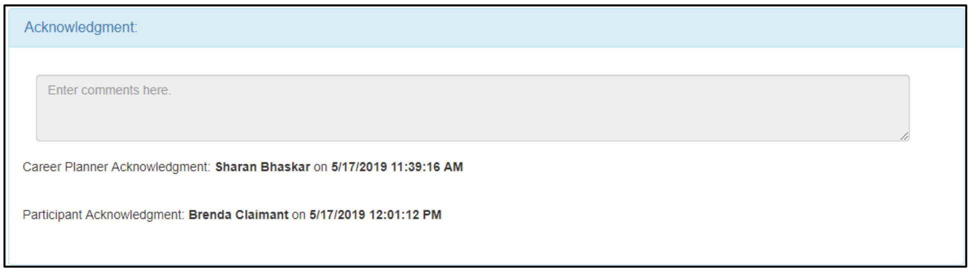
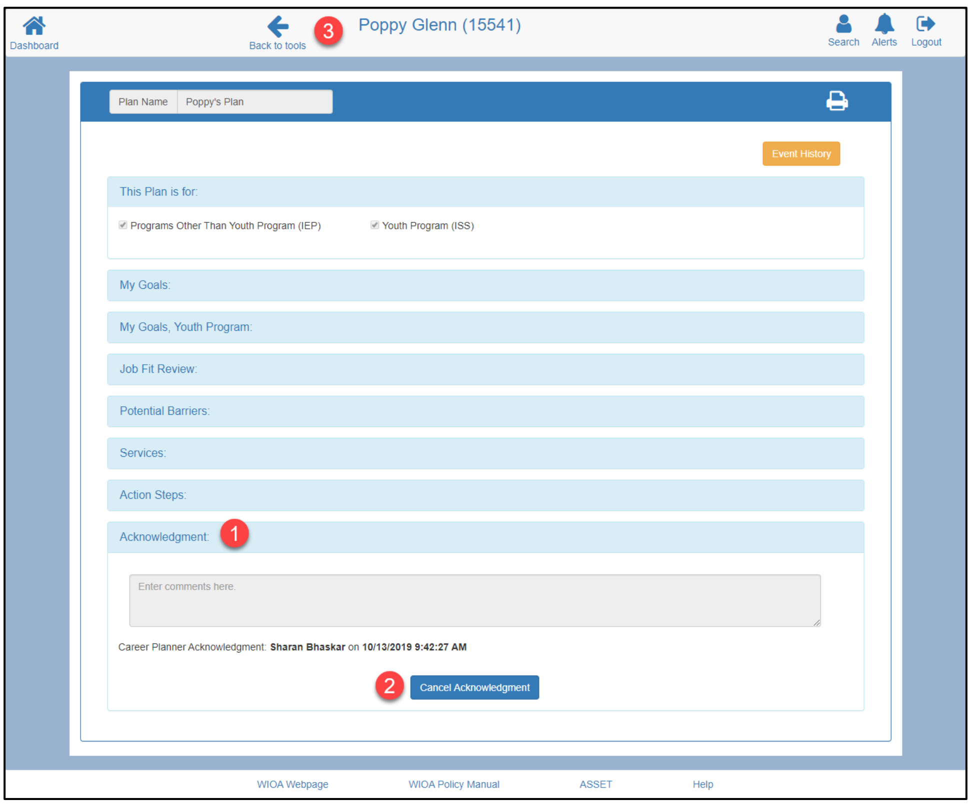
Once an employment plan has been acknowledged by both the participant and the career planner it is considered "Active."

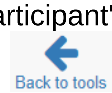
## Employment Plan – Cancel or Complete Acknowledgement

An acknowledgement is completed after the participant also acknowledges their copy of the Employment Plan in JCW. Once the participant acknowledges the plan, both signatures and timestamps appear on the plan, and it is no longer editable.




Until the participant has acknowledged the plan, career planners can still cancel their acknowledgement and put the plan back in "Draft" status.




1) Click on the accordion to see the "Acknowledgement" section.
2) Click "Cancel Acknowledgement" to cancel your acknowledgement and put the plan back into "Draft" status.
3) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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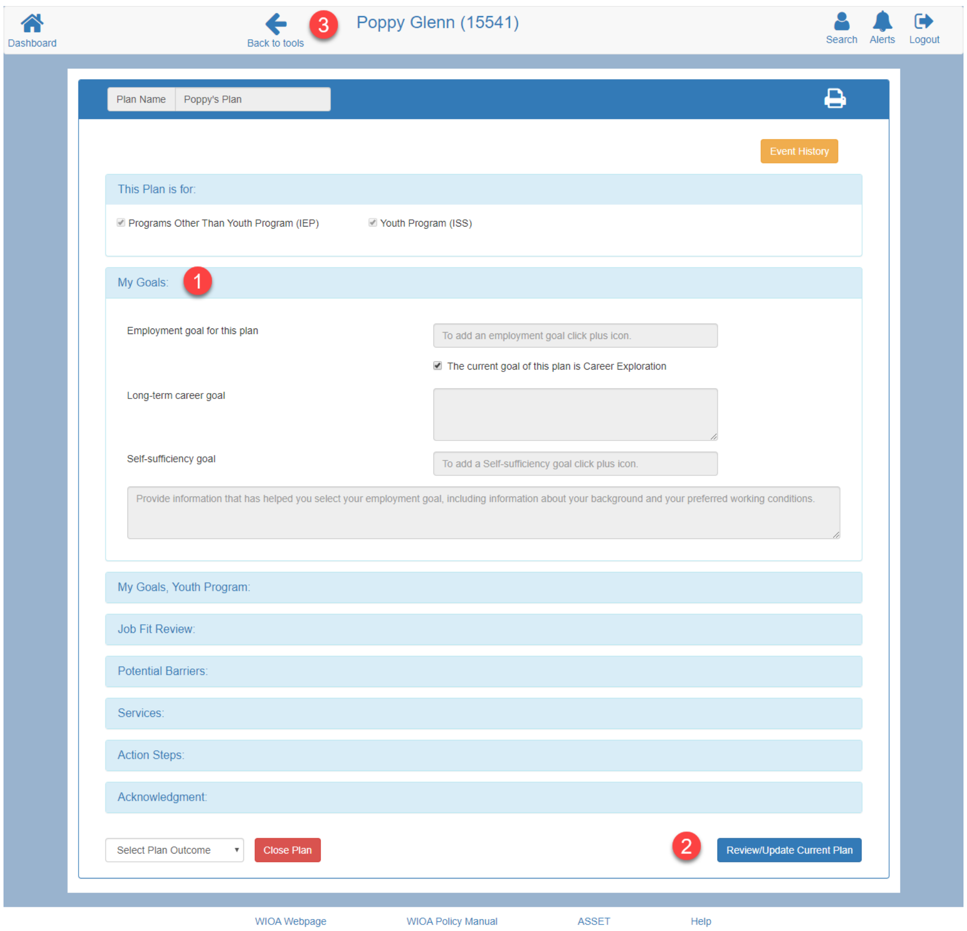
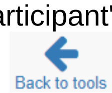
## Employment Plan – Reviewing or Updating a Plan

As mentioned in the Employment Plan – Versions section, CEPT allows career planners to create new versions of an employment plan to capture changes in the participant's service strategy. The option to update a plan becomes available once there is an "Active" plan. When career planners choose to "Review/Update Current Plan" the system creates a new "Draft" editable version of the most recent "Active" plan. All the information in the "Active" plan is copied into the new "Draft" version, leaving the current "Active" plan unaffected.




1) Click on any of the headers to open that section of the employment plan. You cannot edit any information in an "Active" plan.
2) Click "Review/Update Current Plan" to create a new "Draft" version of the current employment plan.
3) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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**Note:** Once it has been created, make sure you hit "Save" on the new "Draft" version of the employment plan, otherwise you may lose any changes you make.

Most of the information from the currently "Active" plan can be modified and updated in the new "Draft" version of the employment plan. Career planners can:

- Change the plan's goal from "Career Exploration" to a specific occupation.

> **Note:** Once you have an "Active" plan with a specific occupation goal identified, you cannot select "Career Exploration" in future versions. To change the goal back to "Career Exploration" you will need to "Close" the current plan and create a new plan (see Employment Plan – Closing an "Active" Plan section).

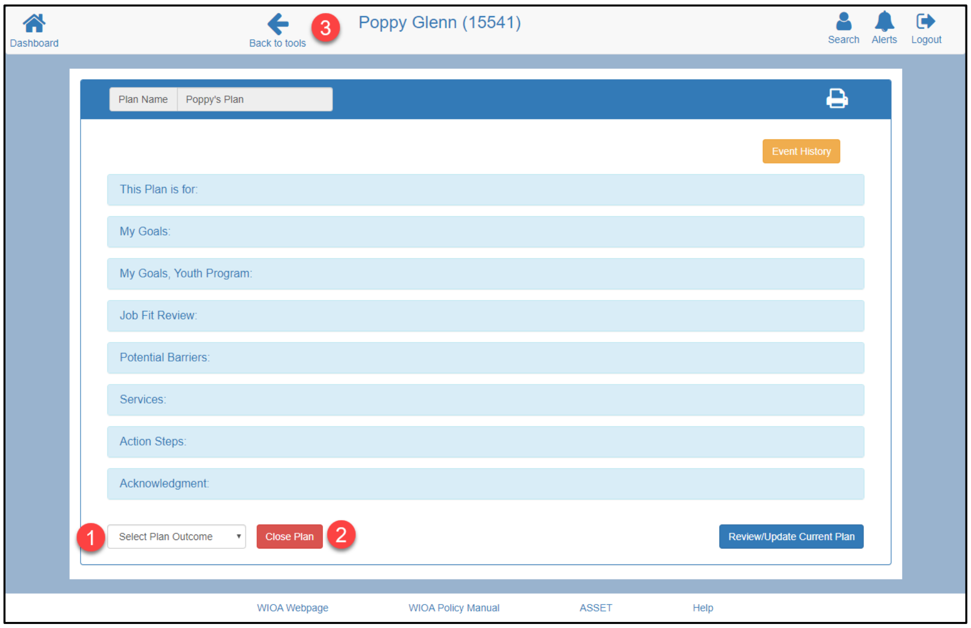
- Update responses to a Job Fit Review.
- Modify the Potential Barriers narrative.
- Associate and disassociate ASSET services.
- Associate and disassociate action steps.

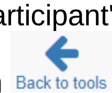
Once updates to the new "Draft" version are complete, the career planner can make the new version "Active" by going through the "Acknowledgement" process (see Employment Plan – Acknowledgement section). Once the new "Draft" version is fully acknowledged, the system will automatically make this new version "Active" and make the previous version "Inactive" (see Employment Plan – Versions section).

Employment Plan – Closing an "Active" Plan

Once a career planner determines that a participant's plan has been completed or will not be completed, they can "Close" the plan. This feature has the following effects:

- The status of the current plan is changed from "Active" to "Closed."
- Any versions of the plan in "Draft" at the time of closing are deleted.
- All versions of the plan, including the "Active" plan that was closed, can no longer be edited, deleted, or updated.




1) Select the outcome of the plan to either "Completed" or "Not Completed."
2) Click "Close Plan" to close the "Active" plan and remove any "Draft" versions. Once a plan has been closed it cannot be reopened.
3) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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Once a plan has been "Closed," the career planner can create a new plan on the Employment Plan widget (see Employment Plan – Widget section).

## Community Resources

The Community Resources tool lets career planners explore resources that might help address a participant's potential barriers to employment. Career planners can mark resources they find as "Favorites" and share them with the participant through My JCW on the Job Center of Wisconsin.

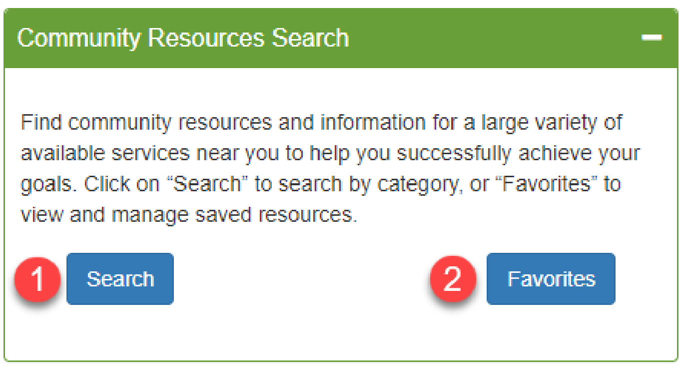
The list of resources is updated and maintained by United Way 211.

<u>Community Resources – Widget</u>

The Community Resources widget lets career planners "Search" for resources or view the participant's "Favorites" list.

The "Search" option takes career planners to the "Community Resources Search" page. From this page, career planners can find resources identified by United Way that can address a participant's potential barrier.

The "Favorites" option takes career planners to the participant's "Favorite Resources" list, where a career planner can see barriers and resources that the participant has shared with the career planner. JCW does not require participants to share any potential barrier, but if they choose to disclose a barrier, they have the option to share or unshare resources on their "Favorite Resources" list.

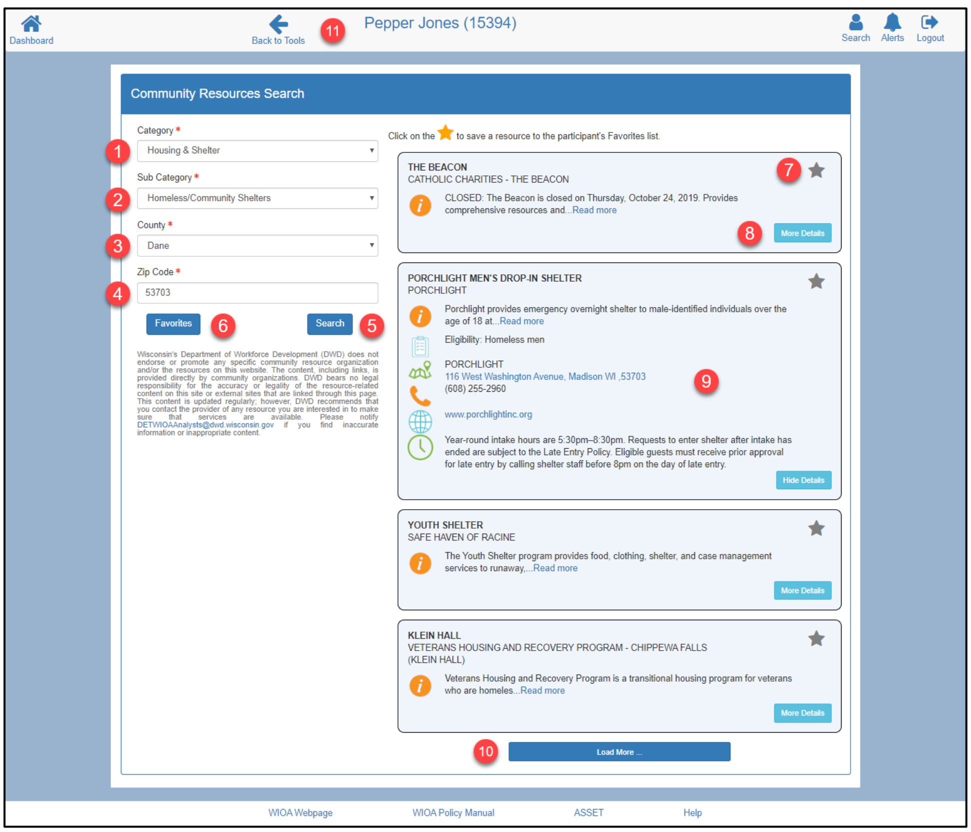



1) Click "Search" to navigate to the "Community Resources Search" page.
2) Click "Favorites" to navigate to the participant's "Favorite Resources" list.

## Community Resources – Community Resources Search

The Community Resources Search page provides career planners with a way to find local resources to help participants address their potential barriers to employment. The list of resources comes from United Way 211, which maintains a curated list of resources throughout Wisconsin. The resources are cataloged using United Way 211's Taxonomy of Human Services (https://211taxonomy.org/), which is endorsed by the Alliance for Information and Referral Systems (AIRS), United Way Worldwide, the National Association of State Units on Aging, and the Public Library Association.

The search feature of the Community Resources tool returns results based on all resources that serve the selected county, sorted by their distance from the center of the specified zip code. For example, selecting "Homeless/Community Shelters", with "Dane" for the county, and "53703" as the zip code, returns all Homeless/Community Shelters that serve at least part of Dane County, with the closest locations to the center of 53703 displayed first. The list of results can contain resources outside of the county, but they may appear lower in the order.

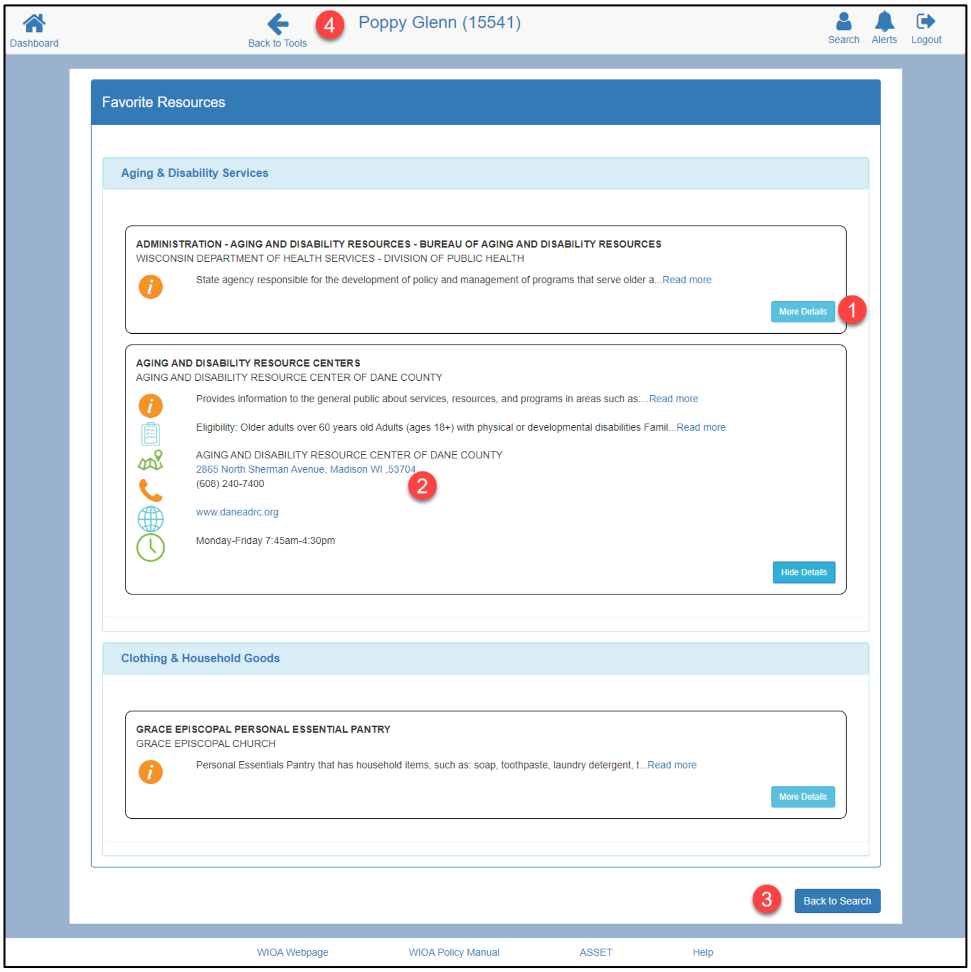


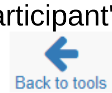

1) From the "Category" dropdown select the appropriate potential barrier category.
2) From the "Sub Category" dropdown select the type of barrier you would like to query.
3) From "County" select the county in which the participant resides, or where they would like to explore available services.
4) Enter the "Zip Code" that should be used to sort the results.
5) Click "Search" to search for any resources that match the criteria.
6) Click "Favorites" to see the participant's list of favorite resources.

7) You can click on the "Star" icon to add a resource to the participant's favorites list. Once an item has been added to a participant's list, only the participant can remove it. Items with yellow "Star" icons are already on the list.
8) Clicking on "More Details" displays additional information about the resource, if available. This includes:
    a. Eligibility criteria
    b. Address
    c. Phone Number
    d. Website
    e. Operating hours
9) Clicking on the address will open a new Google Maps tab with the location identified.
10) Results are displayed in sets of 10. You can click "Load More…" to see the next set of 10 resources, if available.
11) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon .

## Community Resources – Favorite Resources

The Favorite Resources list is a list of all the resources that are currently being shared by the participant. Each resource is displayed in its associated category. Career planners cannot remove items from a participant's Favorite Resources list.




1) Click "More Details" to see the details of a resource.
2) Clicking on the address will open a new tab with the resource mapped on Google Maps.
3) To return to the Community Resources Search page click "Back to Search."
4) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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## Budget Planner

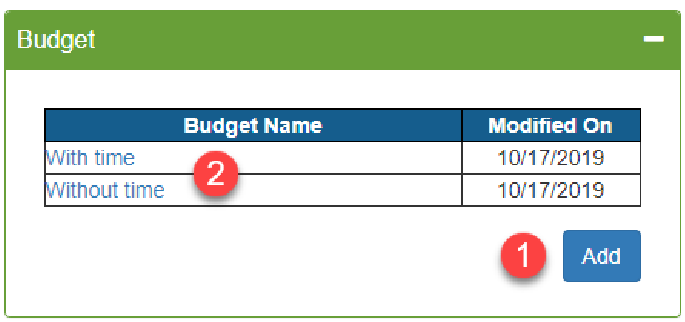
The Budget Planner in CEPT lets career planners develop and see the household budgets of participants. This can be especially useful to make sure the participants have the resources necessary to support their household while services are being provided. Budgets can be created by career planners in CEPT or participants on My JCW. Budgets created by participants are not visible to career planners unless they have been shared by the participant. Budgets created by career planners are always visible to participants.

The CEPT Budget Planner allows career planner to create two types of budgets:

- Budget without dates – This budget is useful to get a summary of a household's expenses, where the income and expenses are relatively static.
- Budget with dates – This budget is useful to see the impact on a household budget where income and expenses are changing over time. For example, in the situation of dislocated workers, this budget can be used to see the impact of losing an income after a layoff. The summary of these budgets is a line graph showing the fluctuations of income and expense over time.

<u>Budget Planner – Widget</u>

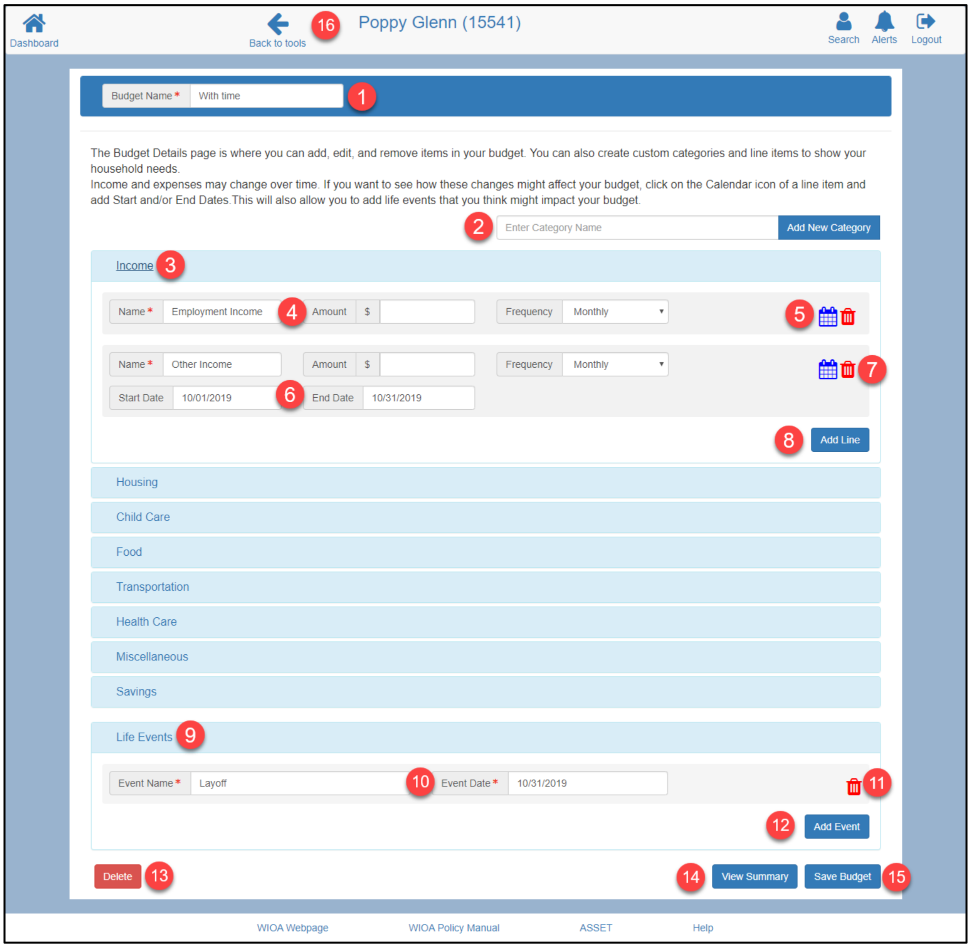
The Budget Planner widget shows all the budgets that have been created or shared by a participant.




1) Click "Add" to create a new budget.
2) Once a budget has been created or shared, click on the budget name in the summary table to access the details.

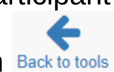
## Budget Planner – Details

On the Budget Details page career planners can create a customized budget to fit a participant's situation. The CEPT Budget Planner comes prepopulated with some common budget items, but each of the items can be customized or removed as needed. Career planners can also add custom categories and line items.




1) Edit the Budget Name to customize it for the participant.
2) Enter a category name and click "Add New Category" to create a new category of line items in the budget.
3) Click on the accordion name to open a section of the budget.
4) A name is the only required field for a budget line. However, only lines that also contain amounts and frequencies will appear in the budget summary.
5) Clicking on the "calendar" icon  will show the "Start Date" and "End Date" field for a line item.
6) Career planners can indicate the "Start Date" or "End Date" of any line item. The calculations on the summary page use start and end dates in three ways:
    a. When a line item has both a start and end date, the calculation only counts the expense during the time period.
    b. When a line item has only a start date, then the calculation only counts the item for dates that fall after the start date.

c. When an item only has an end date, the calculation only counts that item for dates that fall before the end date.

7) You can remove a line item from the budget by clicking the "trash can" icon .
8) The "Add Line" button adds a new line in its respective category, which can be customized.
9) Once start and end dates have been added to a budget, the "Life Events" section becomes available. In this section, you can add important milestones for the participant. These milestones will be visible on the graph in the budget summary.
10) For a life event to be visible on the graph it needs to have a name and date.
11) You can remove a life event from the budget by clicking the "trash can" icon .
12) The "Add Event" button adds a new life event that can be customized.
13) The "Delete" button deletes the budget.
14) Click "View Summary" to see a summary of the budget.
15) Click "Save Budget" to save any changes.
16) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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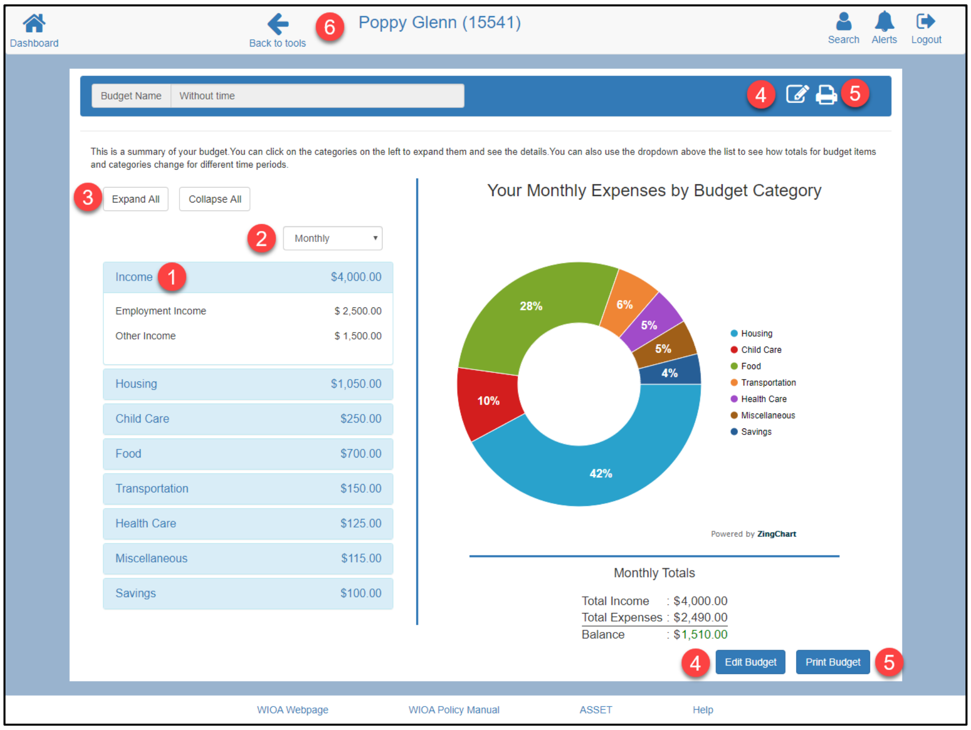
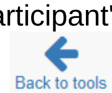
## Budget Planner – Budget Summary Without Time

The Budget Summary provides a graphic representation of the budget details. There are two types of budget summaries; one for budgets that have an element of time, and others that don't.

The graph for budgets without time shows the percent of expense categories as a proportion of total household expenses.

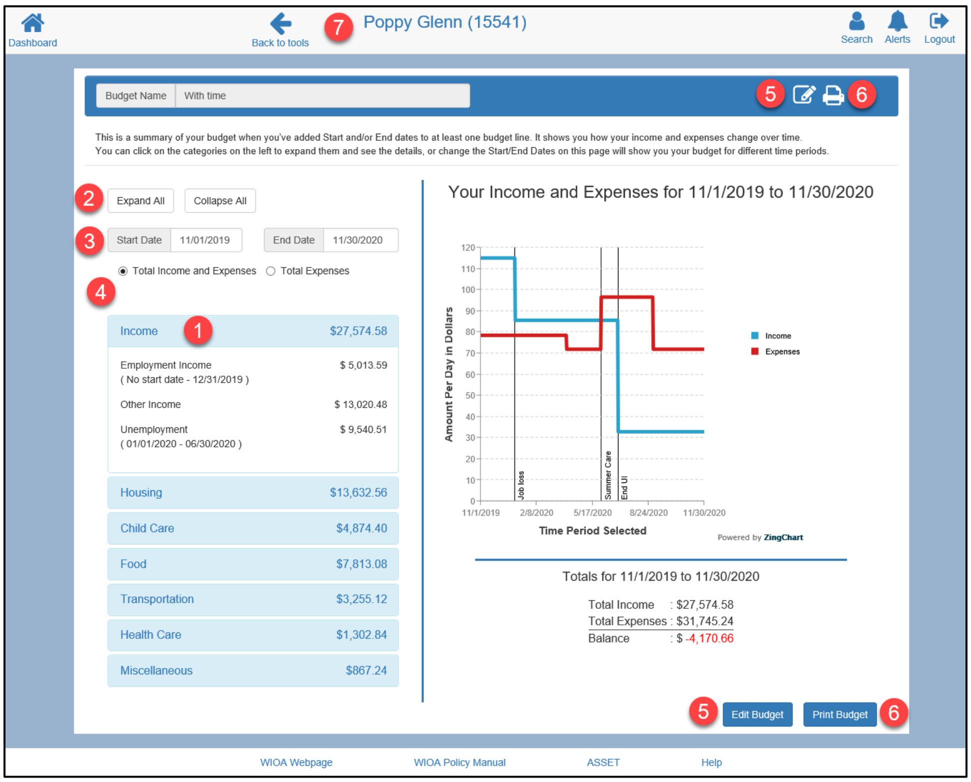



1) Click on individual accordions to see the associated line items and their totals.
2) The graph is initially shown as "Monthly," however, using the dropdown you can change the view to "Daily," "Weekly," "Quarterly," and "Annually." This will convert all the category totals, line item totals, and budget balances to the selected option.
3) Clicking "Expand All" expands all the accordions, and "Collapse All" collapses all accordions.
4) To return to the budget details screen click "Edit Budget" or the "Edit" icon  at the top of the budget summary screen.
5) You can print the budget summary by clicking "Print Budget" or the "Print" icon  at the top of the budget summary screen.
6) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon .

## Budget Planner – Budget Summary with Time

The Budget Summary provides a graphic representation of the budget details. There are two types of budget summaries; one for budgets that have an element of time, and another for those that don't.

The graph for budgets with time shows the changes to a household's income and expenses over time. Using this view lets career planners and participants identify areas of concern where a household's income may not meet expenses.




1) Click on individual accordions to see the associated line items and their totals.
2) Clicking "Expand All" expands all the accordions, and "Collapse All" collapses all accordions.
3) The graph is initially displayed showing the start and end dates of the current month. You can change both the start and end dates to show income and expense over a specific time period. Changing these dates will change the graph of the budget.
4) There are two graphs available. The "Total Income and Expenses" graph shows the changes in household income and expenses over time, while the "Total Expenses" graph shows the effects of changes to individual expense categories over time.
5) To return to the budget details screen, click "Edit Budget" or the "Edit" icon at the top of the budget summary screen.
6) You can print the budget summary by clicking "Print Budget" or the "Print" icon at the top of the budget summary screen.

7) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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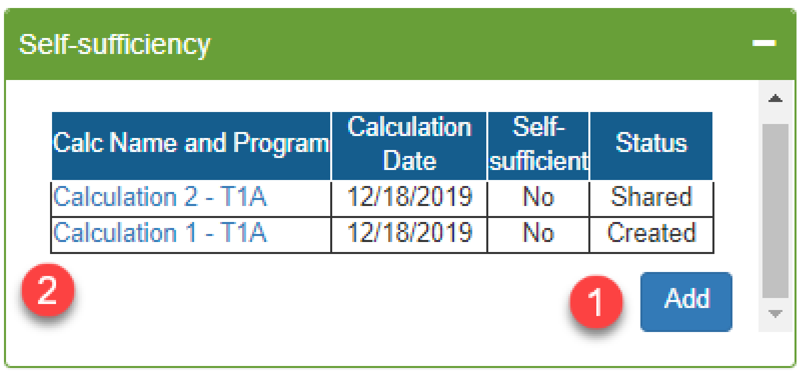
## Self-sufficiency Calculator

The Self-sufficiency (ESS) Calculator is an easy way to determine a participant's economic self-sufficiency status, as well as provide helpful information related to self-sufficiency. ESS calculations can be created by career planners in CEPT or by participants through My JCW on JCW.

All self-sufficiency calculations that career planners create in CEPT are automatically visible to participants on JCW, but only those calculations created in JCW that participants choose to "Share" are visible to career planners.

<u>Self-sufficiency – Widget</u>

The Self-sufficiency widget shows all the calculations that have been created or shared by a participant.

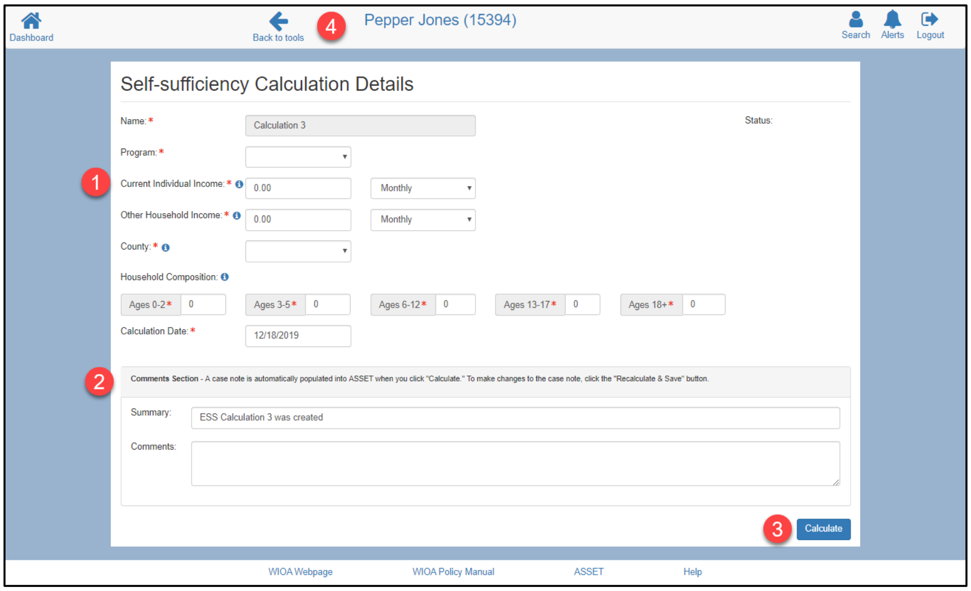


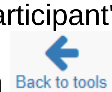

| Calc Name and Program | Calculation Date | Self-sufficient | Status |
|---|---|---|---|
| Calculation 2 - T1A | 12/18/2019 | No | Shared |
| Calculation 1 - T1A | 12/18/2019 | No | Created |

1) Click "Add" to create a new self-sufficiency calculation.
2) Click on a calculation name to see the details of a previously created or shared calculation.

## Self-sufficiency Details – Creating a Calculation

New self-sufficiency calculations are created on the details page. Once created, the ESS calculation can be electronically accepted or rejected by a participant through JCW. A calculation is editable for 24 hours, or until it is accepted or rejected by the participant.




1) You must complete all the required fields to create an ESS calculation.
2) An automatic case note is populated in the participant's ASSET file when you perform a calculation. In the "Comments Section" you can include any comments you would like to appear in the ASSET case note. The Summary section of the case note is automatically populated with text, but is customizable. Once a calculation has been created, you can update the case notes using this section for 24 hours, or until the calculation is accepted or rejected by the participant.
3) Clicking "Calculate" will perform and save an ESS calculation.
4) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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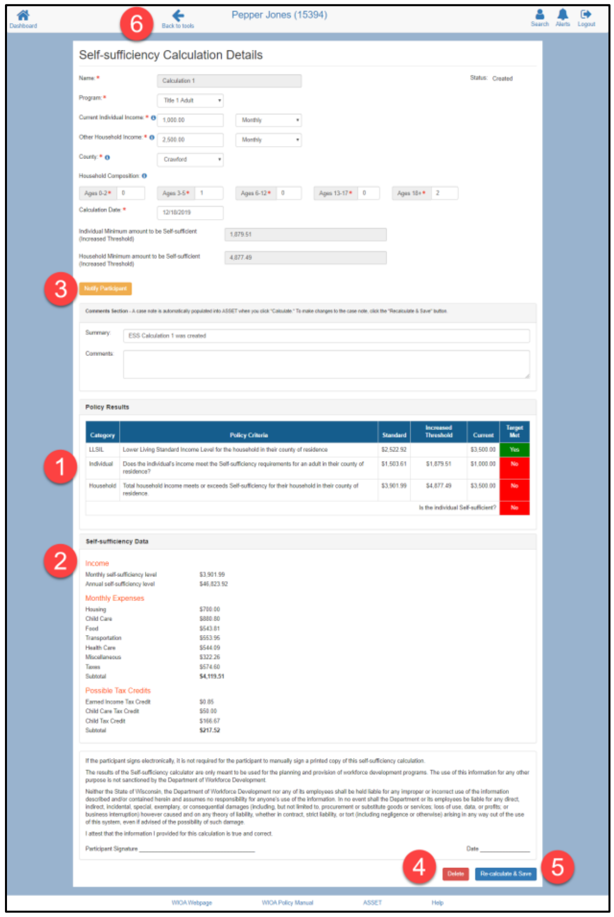
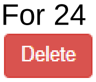
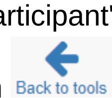
Self-sufficiency Details – Update, Notify and Delete

Once a calculation has been created, career planners have 24 hours to modify or delete the calculation.




1) Policy Results summarizes the application of DWD's Title I ESS policy. It identifies each policy criteria, and whether the participant's situation meets the target. For more information on the Economic Self-sufficiency policy, see [**WIOA ESS POLICY**].
2) The Self-sufficiency Data section shows a summary of the University of Washington's ESS data for the participant's household.
3) When you click the "Notify Participant" button, 

an email is sent to the participant to let them know an ESS calculation needs their sign-off in JCW.
4) For 24 hours after the creation of the ESS calculation, you can use the "Delete" button 

, to delete ESS calculations.
5) Calculations can be updated for 24 hours after they are created.
6) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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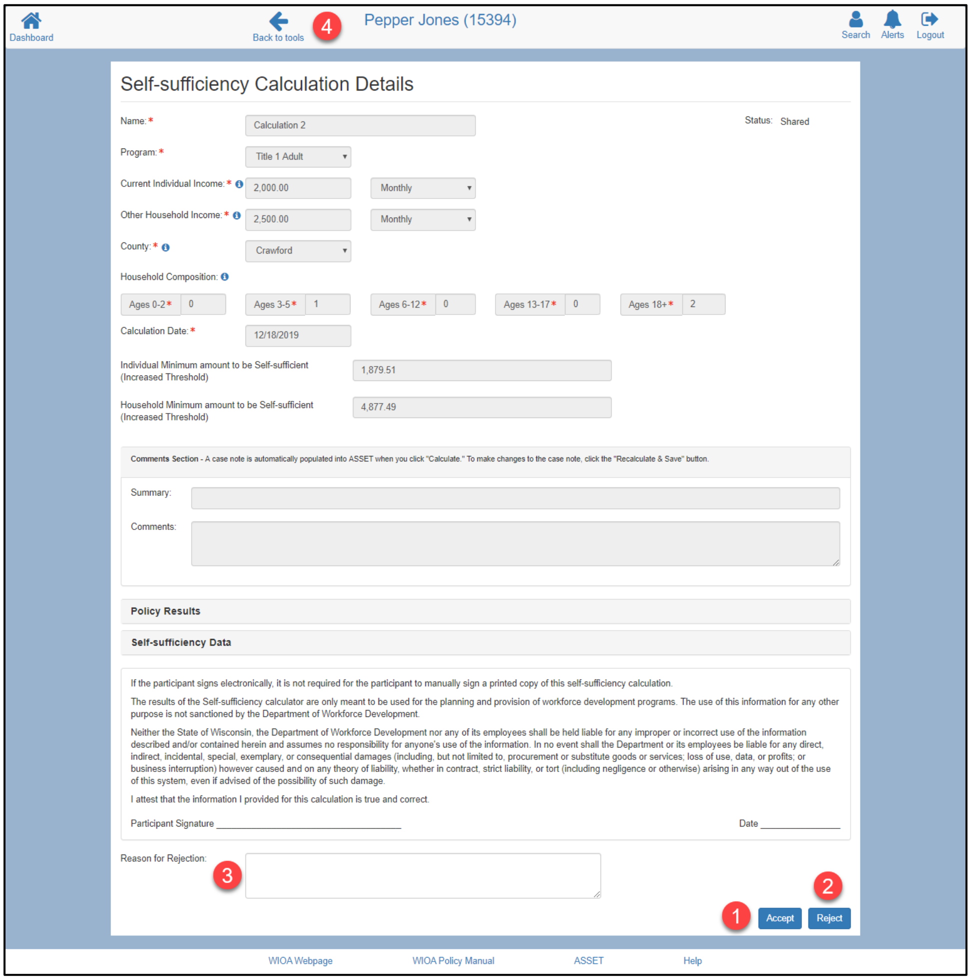
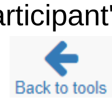
## Self-sufficiency Details – Accepting or Rejecting a Calculation

The ESS calculator enables participants and career planners to electronically "sign off" on calculations. Participants can use the "Self-sufficiency Calculator" widget in My JCW to sign off on calculations created by their career planner. Similarly, career planners can "Accept" or "Reject" an ESS calculation that a participant has created on JCW and shared.




1) You can accept a calculation created by a participant by clicking the "Accept" button. This will automatically create a case note in ASSET, indicating that the ESS calculation was accepted.
2) You can reject a calculation created by a participant by clicking the "Reject" button.
3) When you reject a calculation, you are required to specify the "Reason for Rejection."
4) You can navigate back to the participant's main page by clicking on the participant's name or the "Back to tools" icon 

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