

Creating an Individual Employment Plan/Individual Service Strategy (IEP/ISS) using WorkInTexas.com (WIT)

The purpose of this desk aid is to provide step-by-step instructions for staff creating an IEP/ISS for a participant.

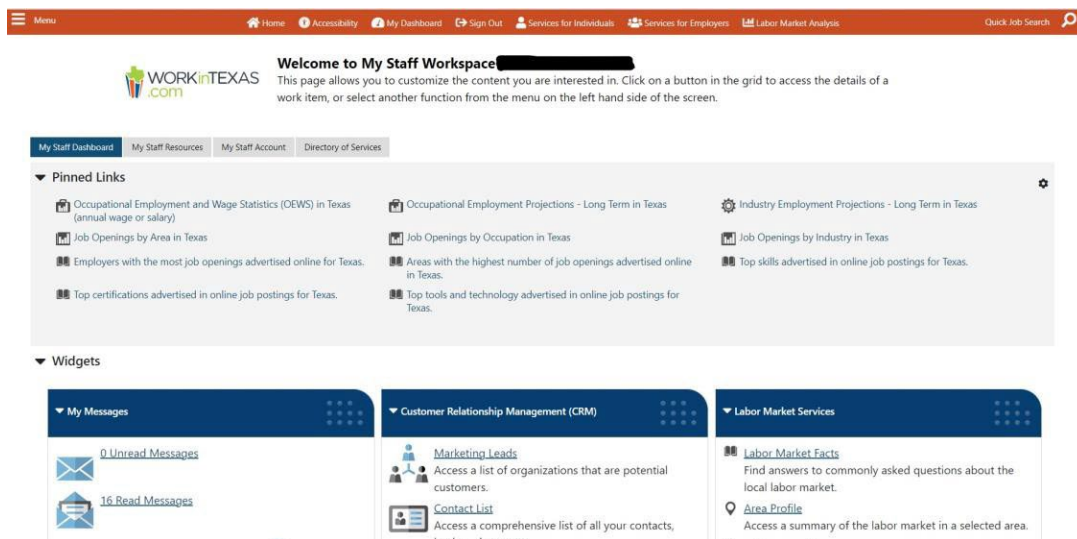
What is an IEP?

- An ongoing strategy jointly developed by the participant and a Workforce Solutions professional which identifies the participant's employment goals.
- An IEP/ISS must include timelines and action steps for the participant and Workforce Solutions to help them gain employment.
- A Wagner-Peyser (W-P) application must be completed BEFORE goals and objectives can be established.
- WIT only allows one IEP/ISS per participant; however, a participant may have open goals and objectives across multiple programs.

To begin entry of the IEP/ISS:

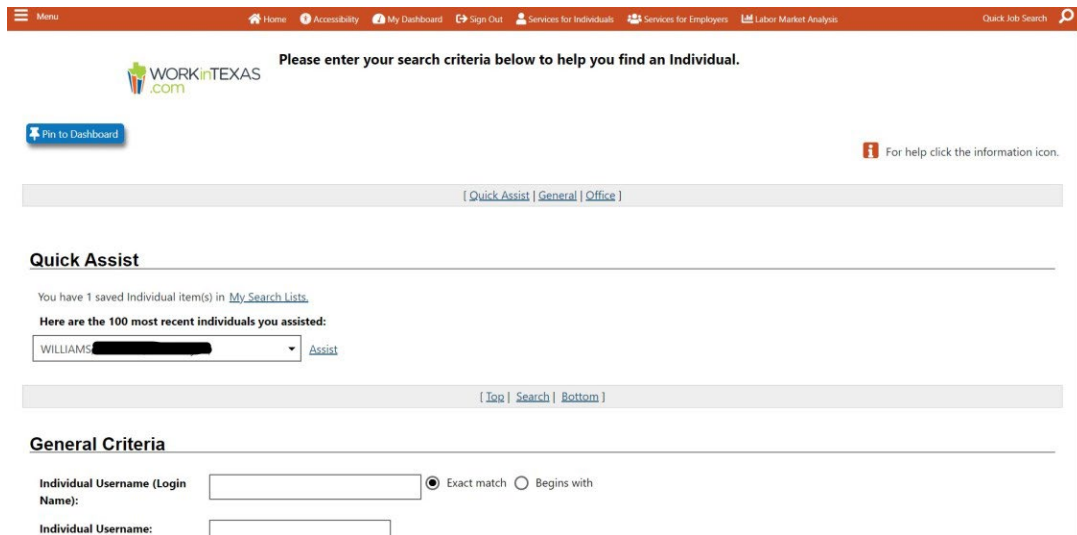
1. Login to WIT.

The home page displays.



2. From the home page, click on the menu in the top left corner and select under *Services for Workforce Staff* -> *Manage Individuals* -> *Assist an Individual*.

The screen below appears.



3. Find the participant's profile and click *Assist* to put them in focus.

You can search under your recent individuals assisted or you can scroll down the page and search by email address, phone number, or name.

4. Once you have the participant in focus, there are two options to access the IEP/ISS in WIT. Both options yield the same result. See below:

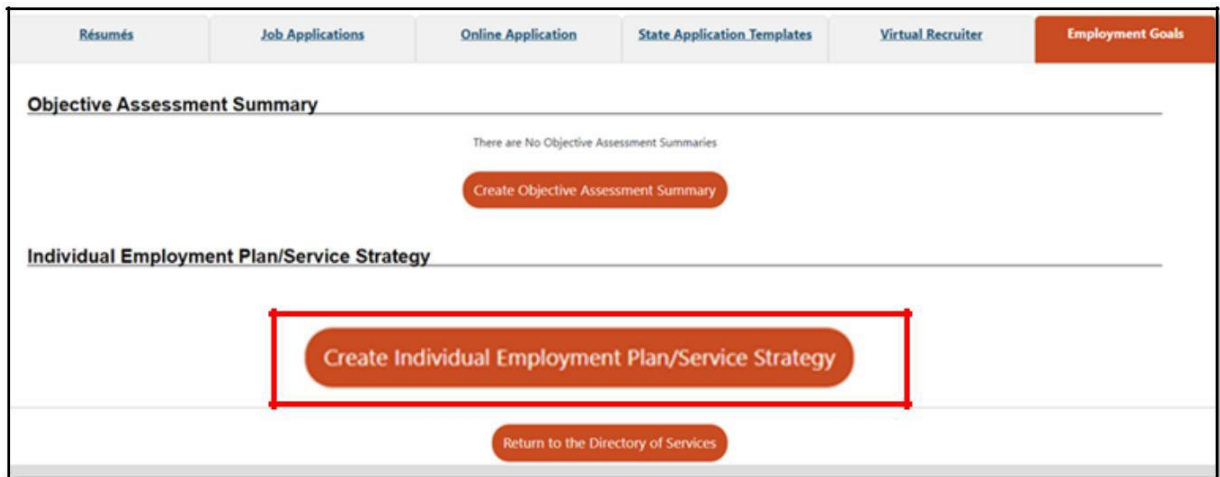


- Option 1: Start at *My Individual Plans*, click *Employment Plan Profile* then *Employment Goals*.

- Option 2: Start at *Staff Profiles*, click *Case Management Profile*, then *Plan*.

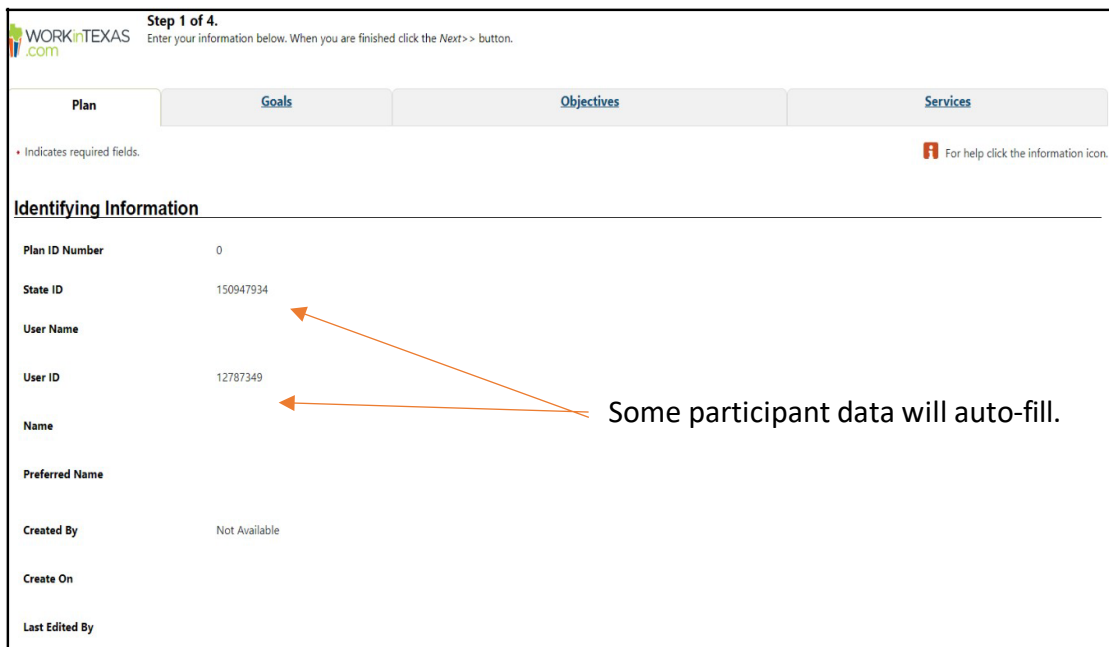
5. The next screen will display the Service Plan Wizard.

Click *Create Individual Employment Plan/Service Strategy*.




6. You will then be guided through the five-step IEP/ISS process.

The following screen will display.



Step 1 of 4.
Enter your information below. When you are finished click the Next>> button.

Plan | **Goals** | Objectives | Services

* Indicates required fields.  For help click the information icon.

Identifying Information

Plan ID Number	0
State ID	150947934
User Name	
User ID	12787349
Name	
Preferred Name	
Created By	Not Available
Create On	
Last Edited By	

Some participant data will auto-fill.



7. Once here, scroll down to the bottom of the page to begin entering the plan information.

STEP 1: Plan Information



- The *Plan Start Date* is the day of your conversation with the participant.
- The next two lines will auto-fill. *Plan Closed On* will remain blank.

Currently Participating In

Currently participating in the following programs:


Wagner Peyser: Application Date: 09/20/2017
Participation Date: 03/08/2022

Plan Information

* **Plan Start Date** (mm/dd/yyyy)  Today 

* **LWDB/Region**

* **Plan started in office location**


Plan closed on (mm/dd/yyyy)  Today

- Scroll to the bottom of this screen and click *Next* to enter the participant's goals. The following screen will display:

IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Actual Completion Date
No History Records				

Click Here to Proceed

[Add New Goal](#) 

[Exit Wizard](#)



STEP 2: Entering Goals

- After clicking, *Add New Goal*, scroll down past *Program Affiliation* and enter the following:
 - ✓ Type of Goal
 - ✓ Term of Goal
 - ✓ Description of Goal
 - ✓ Date Established
 - ✓ Estimated Completion Date.

* **LWDB/Region**

* **Office**

* **Program Affiliation**

- National Farmworker Jobs Programs (NFJP)
- SNAP Employment and Training
- TANF
- Title I - Workforce Development (WIOA)
- Title III - Wagner-Peyser (WP)

* **Type of Goal**

* **Term of Goal**

* **Description of Goal**

* **Date Established** (mm/dd/yyyy) Today

* **Estimated Completion Date** (mm/dd/yyyy) Today

Actual Completion Date (mm/dd/yyyy) Today

* **Completion Status**

For all participants, staff must identify the program the goal is related to by checking the box next to Program Affiliation.

For participants pursuing education and training, staff should enter a long-term employment goal with the participant's interested occupation as the overall goal in the goal description field.

* Program Affiliation Title III - Wagner-Peyser (WP)

* Type of Goal

* Term of Goal

* Description of Goal

* Date Established (mm/dd/yyyy)

* Estimated Completion Date (mm/dd/yyyy)

Actual Completion Date (mm/dd/yyyy)

* Completion Status

For the goal term, use the following guidelines:

- ✓ Short Term – goals that can be completed before a participant’s next visit such as completion of a resume, enrollment in High School Equivalency (HSE) preparation program, or selection of training program(s).
 - ✓ Long Term – goals that may be ongoing throughout the period of participation or result in successful closure of the programs, such as completion of training program(s) or attainment/retention of unsubsidized employment.
 - ✓ Intermediate – goals that fall between short- and long-term goals and may be a step toward a long-term goal, such as successful completion of one semester of a two-semester training program, completion of HSE preparation program, or interview with employer(s).
- Click **Save**. The wizard will redirect back to the IEP/ (ISS) Goals screen, showing the plan and goal you just entered.

IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Actual Completion Date	Last Edit Date	Program	Staff	Status	Action
3288070	Employment - Overall Occupation: Accountant	06/01/2023	06/30/2023		06/01/2023	WP	HUBENAK, SHARON	Open	Edit Delete

[Add New Goal](#)
[Exit Wizard](#)

- To enter additional goals, click *Add New Goal* and follow the same process above.



STEP 3: Objectives

WIT offers pre-defined objectives which may be used when the participant and the Workforce Solutions professional agree that the objective is necessary to achieve the employment goal. **To enter an action step for goals entered in Step 2, staff will select “add new objective.”**

- From the last step, click *Next* to enter the objective information.

Objective Information

* Goal	<input type="text" value="Hazardous Material Hauler WIOA DW"/>
Goal Date Established	<input type="text" value="None Selected"/>
* LWDB/Region	<input type="text" value="CDL Endorsement Training (X) Combination"/>
* Office Location	<input type="text" value="Hazardous Material Hauler WIOA DW"/>
* Program Affiliation	<input type="text" value="Support services/Transportation"/>
	<input type="text" value="Gulf Coast WF Board"/>
	<input type="text" value="487 Workforce Solutions Katy M"/>
	<input type="text" value="Title III - Wagner-Peyser (WP)"/>

- Choose the goal the objective will be related to.
- Then enter the action step(s) connected to the goal:**

Objective Information

* Goal	<input type="text" value="Hazardous Material Hauler WIOA DW"/>
Goal Date Established	<input type="text" value="1/11/2024"/>
* LWDB/Region	<input type="text" value="Gulf Coast WF Board"/>
* Office Location	<input type="text" value="487 Workforce Solutions Katy M"/>
* Program Affiliation	<input type="text" value="Title III - Wagner-Peyser (WP)"/>
* Objective	<input type="text" value="Upon training completion, active"/>

- You can add new or additional objectives by clicking Add New Objective to select a pre-defined objective or enter the remaining action steps for the participant and Workforce Solutions to help them achieve the objective.**



Objective Information

Goal Description	Objective	Date Established	Actual Completion Date	Last Edit Date	Review Date	Program(s)	Staff	Status	action
CDL Endorsement Training (X) Combination	Notify staff of training start/status	01/11/2024		01/16/2024	01/31/2024	WP	Starks, Kimberly	Open	Edit Delete
CDL Endorsement Training (X) Combination	Provide attendance & progress report bi-weekly	01/11/2024		01/16/2024	03/14/2024	WP	Starks, Kimberly	Open	Edit Delete
CDL Endorsement Training (X) Combination	Inform staff of any changes affecting program completion (address, new job, etc.)	01/11/2024		01/16/2024	03/14/2024	WP	Starks, Kimberly	Open	Edit Delete
Hazardous Material Hauler WIOA DW	Upon training completion, active job search with staff	01/11/2024		01/16/2024	03/14/2024	WP	Starks, Kimberly	Open	Edit Delete
Hazardous Material Hauler WIOA DW	Maintain weekly contact	01/11/2024		01/16/2024	03/14/2024	WP	Starks, Kimberly	Open	Edit Delete
Hazardous Material Hauler WIOA DW	Report employment	01/11/2024		01/16/2024	03/14/2024	WP	Starks, Kimberly	Open	Edit Delete
Support services/Transportation	Submit gas transaction receipts within 5 days of purchase	01/11/2024		01/16/2024	03/14/2024	WP	Starks, Kimberly	Open	Edit Delete
Support services/Transportation	Request gas assistance reload when submitting attendance documents	01/11/2024		01/16/2024	03/14/2024	WP	Starks, Kimberly	Open	Edit Delete

[Add new objective](#)
[Select pre-defined objectives](#)
[Exit Wizard](#)

- Once all the objectives and action steps have been entered, click *Next* at the bottom of the screen to proceed to services.

STEP 4: Services

A list of the services the participant has received for the current Wagner-Peyser application will display.

IEP/ISS Services

App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
8808851 - WP	205 - Develop Service Strategies (IEP/ISS/EDP)	A - 06/01/2023	A - 06/01/2023	Employment Service	13981459

[Exit Wizard](#)

<< Back
Finish

The service 205 – Develop Service Strategies will auto-populate once the IEP/ISS is entered.

- Click *Finish*. The employment plan/service strategy is now complete.
- Click *Next* to review and sign.



STEP 5: Review and Sign the Service Plan

- Locate the IEP/ISS with an OPEN status. Then click *Display/Print*.

[Case Summary](#)
[Programs](#)
Plan
[Assessments](#)

Objective Assessment Summary

There are No Objective Assessment Summaries

[Create Objective Assessment Summary](#)

Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
316575	Gulf Coast WF Board	482 WF Solutions Lake Jackson	OPEN	4	Douglas, Jessica	03/08/2022	Edit Delete Display/Print

[Create Individual Employment Plan/Service Strategy](#)

- A review page will display the following information:
 - ✓ Identifying Information
 - ✓ Currently Participating In
 - ✓ Plan Information
 - ✓ IEP/ISS Goals
 - ✓ Objective Information
 - ✓ IEP/ISS Services
 - ✓ Remote Signature



Individual Employment Plan

General Information

Plan ID: 1333
State ID: 28172
User Name: 28TWEETLEDEE
User ID: 47424
Name: O'Hara, Scarlett
Preferred Name:
Created By: Kimberly Starks (47373)
Created On: 01/11/2024
Last Edited By: Kimberly Starks (47373)
Edited On: 01/16/2024

Plan Information

Plan Start Date: 01/11/2024
LWDB/Region: Gulf Coast WF Board
Plan started in office location: 487 Workforce Solutions Katy M
Plan closed on:

Goals and Objectives Established:

Goal 1/3

Goal #	Goal	Term of Goal	Date Established	Estimated Date for Completion	Actual Completion Date	Last Edit Date	Program	Staff	Status
1154	Training - CDL Endorsement Training (X) Combination	Long Term	01/11/2024	01/11/2024		01/11/2024	WP	Starks, Kimberly	Open

Comments:

Objectives to Goal 1/3: CDL Endorsement Training (X) Combination

Objective	Date Established	Actual Completion Date	Last Edit Date	Review Date	Program(s)	Staff	Status
Notify staff of training start/status	01/11/2024		01/11/2024	01/31/2024	WP	Starks, Kimberly	Open

Comments:

Provide attendance & progress report bi-weekly	01/11/2024		01/11/2024	03/14/2024	WP	Starks, Kimberly	Open
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Comments:

Inform staff of any changes affecting program completion (address, new job, etc.)	01/11/2024		01/11/2024	03/14/2024	WP	Starks, Kimberly	Open
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Comments:

Goal 2/3

Goal #	Goal	Term of Goal	Date Established	Estimated Date for Completion	Actual Completion Date	Last Edit Date	Program	Staff	Status
1155	Employment - Hazardous Material Hauler WIOA DW	Long Term	01/11/2024	03/09/2024		01/11/2024	WP	Starks, Kimberly	Open

Comments:

- Review and confirm all information was completed. The IEP/ISS is now ready to sign and send to the participant for their signature.
- Click on *Capture Signature* on the Applicant Signature line. A box will appear.
- Click Message to send the request for signature to the participant's WIT Inbox. Click *Manual* for a participant who is attending the appointment in person.
- After the participant signs, staff should sign in the *Staff Signature* area.
- An electronic signature may be used if there is one saved in the *My Staff Dashboard* in WIT.

Applicant Signature: _____

Staff Signature: _____

Return Print

Optional Electronic Signature in WIT

- Click on *My Staff Account* tab in WIT. Scroll to the bottom of the web page to *Staff Signature*.
- Create the signature using a mouse (if accessing from desktop computer) or sign electronically on a device that allows touchscreen/stylus access (example: phone, laptop, surface pro, iPad, or tablet).
- Once the desired signature has been created, click *Save*.