Individual Employment Plan (IEP) Enrollment Guide

OWCI Guide for completing
the Individual Employment Plan/Service Strategy

Introduction

This document was created to help case managers with completing the Individual Employment Plan (IEP), which is required when enrolling participants in SkillUP. Please use this as a guide as you navigate through the plan.

The purpose of the IEP is to outline the steps necessary for the participant's success. This is achieved using goals and objectives. The goals should be the overall goal of the training or education. These are defined as *short-term*, *intermediate*, and *long-term* goals. Not every participant will have an intermediate goal, but the Employment Plan must contain, at a minimum, one long-term and one short-term goal. The number of goals will be based on the individual's needs and must follow the SMART goal strategy. Each goal must contain, at a minimum, one objective attached to each goal, and address all necessary steps to complete the goal. Often, these are used to guide not only the participant, but also help guide the case manager through the participant's journey.

Where to go and how to get there

Start by selecting "*Plan*" under the Case Management Profile Tab

Next, scroll towards the bottom of the screen under "Individual Employment Plan/Service Strategy." Here, select "*Edit*" on the IEP with the status of <u>OPEN</u>. These are considered living documents; they will stay open throughout the duration of the clients' enrollments. If there is no <u>OPEN</u> status IEP, select "*Create Individual Employment Plan/Service Strategy*".

Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
425287	Central Region	COLUMBIA JOB CENTER	OPEN	2	BOWLES, Jerri	11/08/2024	Edit Delete Display/Print

Create Individual Employment Plan/Service Strategy

OR

Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
425287	Central Region	COLUMBIA JOB CENTER	CLOSED	2	BOWLES, Jerri	11/08/2024	Edit Delete Display/Print

Create Individual Employment Plan/Service Strategy

The next screen will take you to the "*Plan*" tab.

Plan

Here you enter the plan start date, the region, and the office location. Please note the office location should ALWAYS be "FSD Partner _____". This is also the same place you will close the IEP should you ever need to.

The next screen will take you to the "*Goal*" tab.

Goals

Enter the goals you and the participant have discussed and defined. There are options for short term, intermediate, and long term. The SkillUP program requires, at minimum, one short term and one long term goal. Please see the provider handbook for more details on what is required for the goal and objective setting.

PRO TIP: When entering the "*Description of Goal*", it is best practice to put the goal type in the beginning to help distinguish which goal is which in later screens. Examples can include, but are not limited to: Short-Term, Short-Term Goal, ST, Short Goal, etc.

Goal Information

* LWDB/Region   [Central Region ▼]

* Office   [FSD Partner Central ▼]

* Program Affiliation
- ☐ 2019 Summer Jobs League
- ☐ 2021 Jobs League
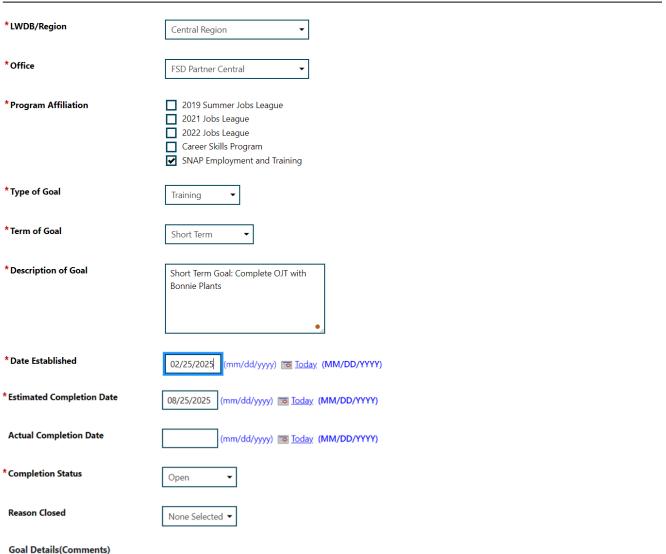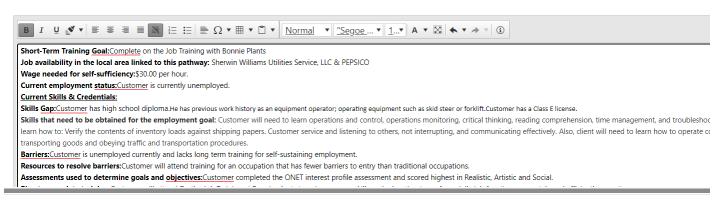- ☐ 2022 Jobs League
- ☐ Career Skills Program
- ☑ SNAP Employment and Training

* Type of Goal   [Training ▼]

* Term of Goal   [Short Term ▼]

* Description of Goal   [Short Term Goal: Complete OJT with Bonnie Plants]

* Date Established   [02/25/2025] (mm/dd/yyyy) 📅 Today (MM/DD/YYYY)

* Estimated Completion Date [08/25/2025] (mm/dd/yyyy) 📅 Today (MM/DD/YYYY)

Actual Completion Date   [ ] (mm/dd/yyyy) 📅 Today (MM/DD/YYYY)

* Completion Status   [Open ▼]

Reason Closed   [None Selected ▼]

Goal Details(Comments)

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Short-Term Training Goal: Complete on the Job Training with Bonnie Plants
Job availability in the local area linked to this pathway: Sherwin Williams Utilities Service, LLC & PEPSICO
Wage needed for self-sufficiency:$30.00 per hour.
Current employment status: Customer is currently unemployed.
Current Skills & Credentials:
Skills Gap: Customer has high school diploma.He has previous work history as an equipment operator; operating equipment such as skid steer or forklift.Customer has a Class E license.
Skills that need to be obtained for the employment goal: Customer will need to learn operations and control, operations monitoring, critical thinking, reading comprehension, time management, and troubleshoo learn how to: Verify the contents of inventory loads against shipping papers. Customer service and listening to others, not interrupting, and communicating effectively. Also, client will need to learn how to operate c transporting goods and obeying traffic and transportation procedures.
Barriers: Customer is unemployed currently and lacks long term training for self-sustaining employment.
Resources to resolve barriers: Customer will attend training for an occupation that has fewer barriers to entry than traditional occupations.
Assessments used to determine goals and objectives: Customer completed the ONET interest profile assessment and scored highest in Realistic, Artistic and Social.

Here is an example of what the short-term goal detail example can look like. This includes all the information necessary when completing an enrollment. Please note, if you do not have the exact information regarding LMI as listed below, please use related information that your entity policy requires.

Short Term Goal Detail Example:

Short-Term Training Goal: Complete on the Job Training with Bonnie Plants
Job availability in the local area linked to this pathway: Sherwin Williams Utilities Service, LLC & PEPSICO
Wage needed for self-sufficiency: $30.00 per hour.
Current employment status: Customer is currently unemployed.
Skills Gap: Customer has high school diploma. He has previous work history as an equipment operator; operating equipment such as skid steer or forklift. Customer has a Class E license.
Skills that need to be obtained for the employment goal: Customer will need to learn operations and control, operations monitoring, critical thinking, reading comprehension, time management, and troubleshooting. He will need to learn how to: Verify the contents of inventory loads against shipping papers. Customer service and listening to others, not interrupting, and communicating effectively. Also, client will need to learn how to operate company vehicle while transporting goods and obeying traffic and transportation procedures.
Barriers: Customer is unemployed currently and lacks long term training for self-sustaining employment.
Resources to resolve barriers: Customer will attend training for an occupation that has fewer barriers to entry than traditional occupations.
Assessments used to determine goals and objectives: Customer completed the ONET interest profile assessment and scored highest in Realistic, Artistic and Social.
Plan to complete training: Customer will attend On the Job Training at Bonnie plants to gain necessary skills and education to perform daily job functions accurately and efficiently. He will request supportive services as needed.
Training Provider & Program selected: Bonnie Plants
Credential to be obtained: On the Job Training
Total Cost: TBD
Cost Breakdown: $23.00 per hour
Length of Training & Projected Start Date: TBD, approx. 320 hours.
Funding available to assist with training costs: OJT is not Pell grant eligible. Skill Up TANF funding will be utilized.

After saving, you will return to the previous screen.

IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Actual Completion Date	Last Edit Date	Program	Staff	Status	Action
670638	Training - Short Term Goal: Complete OJT with Bonnie Plants	02/25/2025	08/25/2025		02/25/2025	SNAP	Cooper, Bailey	Open	Edit Delete

Add New Goal
Exit Wizard

<< Back   Next >>

Repeat these steps by selecting "*Add New Goal*" until all the necessary goals for your participant are entered.

Goal Information

* LWDB/Region

Central Region ▼

* Office

FSD Partner Central ▼

* Program Affiliation

☐ 2019 Summer Jobs League
☐ 2021 Jobs League
☐ 2022 Jobs League
☐ Career Skills Program
☑ SNAP Employment and Training

* Type of Goal

Employment ▼

* Term of Goal

Long Term ▼

* Description of Goal

Long Term Goal: Obtain Employment as a Light Truck Driver

* Date Established

02/25/2025 (mm/dd/yyyy) 🔳 Today (MM/DD/YYYY)

* Estimated Completion Date

02/25/2026 (mm/dd/yyyy) 🔳 Today (MM/DD/YYYY)

Actual Completion Date

(mm/dd/yyyy) 🔳 Today (MM/DD/YYYY)

* Completion Status

Open ▼

Reason Closed

None Selected ▼

Goal Details(Comments)

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Career Pathway: Light Truck Driver
O*Net Code: 53-3033.00
Long-Term Employment Goal: Obtain employment as a Light Truck Driver
Source of LMI: MERIC/O*Net
Local Projected Growth: 14.5%
Local Projected Wage: $37,600.00

Here is an example of what a long-term goal detail example can look like. This includes all the information necessary when completing an enrollment. Please note, if you do not have the exact information regarding LMI as listed below, please use related information that your entity policy requires.

Long Term Goal Detail Example:
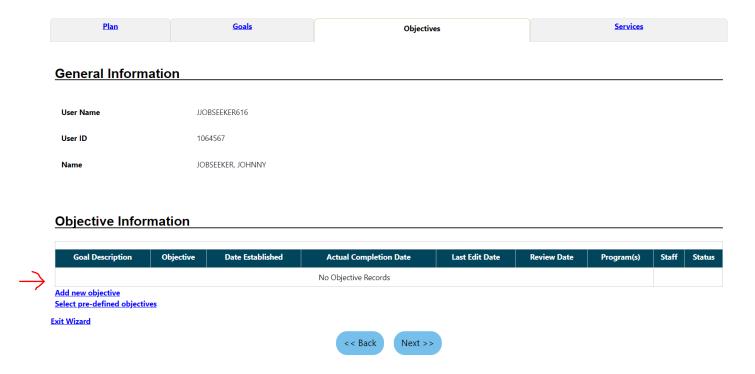
Career Pathway: Light Truck Driver
O*Net Code: 53-3033.00
Long-Term Employment Goal**:** Obtain employment as a Light Truck Driver
Source of LMI: MERIC/O*Net
Local Projected Growth: 14.5%
Local Projected Wage: $37,600.00

Once you finish establishing your Goals, the next screen will take you to the "Objectives" tab.

Objectives

On the objectives tab, enter the objectives for each goal that have been established. The SkillUP program requires a minimum one objective for each short term and one long term goal. Think of the objectives as the steps that are necessary for the participants to reach their goals. Please see the provider handbook for more details on what is required for the goal and objective setting.

Plan	Goals	Objectives	Services

General Information

User Name	JJOBSEEKER616
User ID	1064567
Name	JOBSEEKER, JOHNNY

Objective Information

Goal Description	Objective	Date Established	Actual Completion Date	Last Edit Date	Review Date	Program(s)	Staff	Status
			No Objective Records					

Add new objective
Select pre-defined objectives

Exit Wizard

(<< Back) (Next >>)

Much like the "*Goal*" screen, enter the following information, including the details of the objective. These can be 1-2 sentences, short and concise.
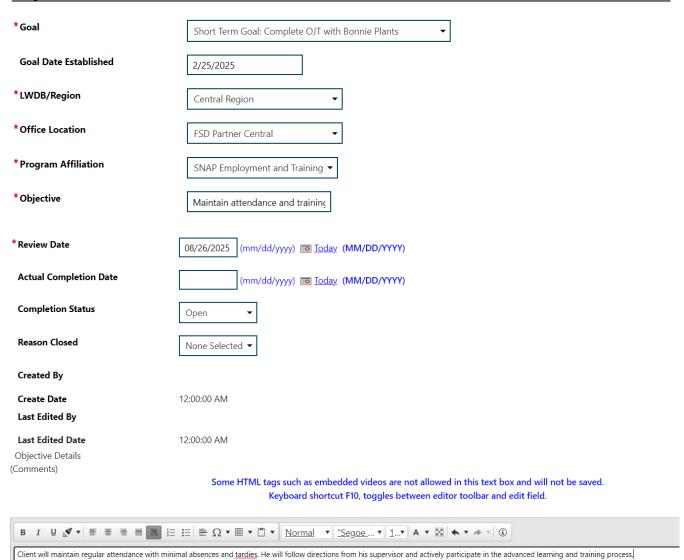
General Information

Username	JJOBSEEKER616
State ID	0
User ID	1064567
Name	JOBSEEKER, JOHNNY

Objective Information

* Goal Short Term Goal: Complete OJT with Bonnie Plants ▼

Goal Date Established 2/25/2025

* LWDB/Region Central Region ▼

* Office Location FSD Partner Central ▼

* Program Affiliation SNAP Employment and Training ▼

* Objective Maintain attendance and training

* Review Date 08/26/2025 (mm/dd/yyyy) Today **(MM/DD/YYYY)**

Actual Completion Date (mm/dd/yyyy) Today **(MM/DD/YYYY)**

Completion Status Open ▼

Reason Closed None Selected ▼

Created By

Create Date 12:00:00 AM

Last Edited By

Last Edited Date 12:00:00 AM

Objective Details
(Comments)

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Client will maintain regular attendance with minimal absences and tardies. He will follow directions from his supervisor and actively participate in the advanced learning and training process.

Short Term Objective Detail Examples:

Objective: Maintain attendance and training requirements

Objective Details: Client will maintain regular attendance with minimal absences and tardies. He will follow directions from his supervisor and actively participate in the advanced learning and training process.

Objective: Complete mid-point monitoring

Objective Details: Employment Specialist will complete the mid-point monitoring with Bonnie Pants to document the clients progress in the OJT.

Objective: Complete end-point monitoring

Objective Details: Employment Specialist will complete the end-point monitoring with Bonnie Pants to document the clients progress in the OJT.

After saving, you will return to the previous screen.

Repeat these steps by selecting "*Add New Objective*" until all the necessary objectives for your participant are entered.

Objective Information

Goal Description	Objective	Date Established	Actual Completion Date	Last Edit Date	Review Date	Program(s)	Staff	Status	action
Short Term Goal: Complete OJT with Bonnie Plants	Maintain attendance and training requirements	02/26/2025		02/26/2025	08/26/2025	SNAP	Cooper, Bailey	Open	Edit Delete

Add new objective
Select pre-defined objectives

Exit Wizard

(<< Back)   (Next >>)

Objective Information

* **Goal**
Long Term Goal: Obtain Employment as a Light Truck Driver ▼

Goal Date Established
2/25/2025

* **LWDB/Region**
Central Region ▼

* **Office Location**
FSD Partner Central ▼

* **Program Affiliation**
SNAP Employment and Training ▼

* **Objective**
Request Supportive Services, as r

* **Date Established**
02/26/2025 (mm/dd/yyyy) 📅 Today (MM/DD/YYYY)

* **Review Date**
02/26/2026 (mm/dd/yyyy) 📅 Today (MM/DD/YYYY)

Actual Completion Date
(mm/dd/yyyy) 📅 Today (MM/DD/YYYY)

Completion Status
Open ▼

Reason Closed	None Selected ▼
Created By	
Create Date	12:00:00 AM
Last Edited By	
Last Edited Date	12:00:00 AM

Objective Details
(Comments)

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Client will request supportive services for items that are directly linked to the success of their education and/or employment, if not personally feasible and community resources are unavailable.

Long Term Objective Detail Examples:

Objective: Request Supportive Services, as needed

Objective Details: Client will request supportive services for items that are directly linked to the success of their education and/or employment, if not personally feasible and community resources are unavailable.

Objective: Revise Resume

Objective Details: Client would like to revise resume after completion of training to reflect newly acquired skills to be more marketable to employers.

Objective: Provide Employment Verification

Objective Details: Once client retains employment, they will provide employment verification to CM to document completion of defined long-term goal.

Objective Information

Goal Description	Objective	Date Established	Actual Completion Date	Last Edit Date	Review Date	Program(s)	Staff	Status	action
Short Term Goal: Complete OJT with Bonnie Plants	Maintain attendance and training requirements	02/26/2025		02/26/2025	08/26/2025	SNAP	Cooper, Bailey	Open	Edit Delete
Long Term Goal: Obtain Employment as a Light Truck Driver	Request Supportive Services, as needed	02/26/2025		02/26/2025	02/26/2026	SNAP	Cooper, Bailey	Open	Edit Delete

Add new objective
Select pre-defined objectives
Exit Wizard

(<< Back) (Next >>)

After finishing the objectives, the final screen will be "*Services*".

Services

On this tab, services will automatically appear as they are entered in the programs tab.

Finally, select "*Finish*" to save and complete the IEP.

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