



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.

**Please keep in mind, confidential information should not be shared in this plan. Please maintain hard files of confidential information if necessary.*

Where to go and how to get there

Start by selecting “Plan” under the Case Management Profile Tab



Case Management - IEP/ISS

Use this folder to manage Plan information for the selected Individual.

[[Assist an individual](#) | [Staff Services](#) | [Individual Portfolio](#)]

The screenshot shows a navigation menu with three main categories: My Individual Profiles, My Individual Plans, and Staff Profiles. The Staff Profiles section is expanded, showing sub-items like General Profile, Case Management Profile, and Report Profile. The 'Plan' item under Case Management Profile is circled in red, with a red arrow pointing to it from the right.

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

Plan Information

* Plan Start Date (mm/dd/yyyy) [Today \(MM/DD/YYYY\)](#)

* LWDB/Region

* Plan started in office location

Plan closed on (mm/dd/yyyy) [Today \(MM/DD/YYYY\)](#)

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.

General Information

User Name JJOBSEEKER616
User ID 1064567
Name JOBSEEKER, JOHNNY

IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Actual Completion Date	Last Edit Date	Program	Staff	Status	Action
No History Records									



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

Wage needed for self-sufficiency: \$30.00 per hour.

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

* Office

* Program Affiliation

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

* Type of Goal

* Term of Goal

* **Description of Goal**

* **Date Established** (mm/dd/yyyy) (MM/DD/YYYY)

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

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

* **Completion Status**

Reason Closed

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
Job availability in the local area linked to this pathway: Sherwin Williams Utilities Service, LLC & PEPSICO
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

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

Job availability in the local area linked to this pathway: Sherwin Williams Utilities Service, LLC & PEPSICO

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.

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

Goal Date Established

* LWDB/Region

* **Office Location**

* **Program Affiliation**

* **Objective**

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

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

Completion Status

Reason Closed

Created By

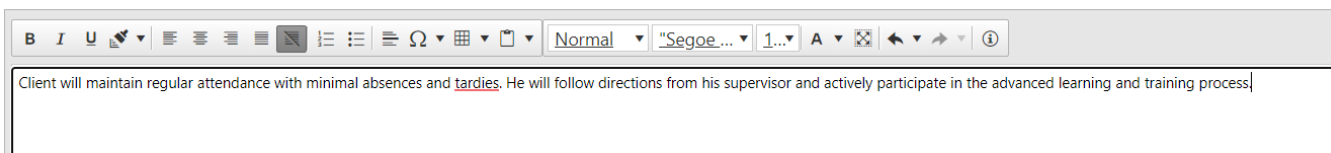
Create Date 12:00:00 AM

Last Edited By

Last Edited Date 12:00:00 AM

Objective Details
(Comments)

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Keyboard shortcut F10, toggles between editor toolbar and edit field.



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: 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](#)

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Next >>

Above listed Objectives are examples of what a participant could need. Objectives will vary from participant to participant, please ensure objectives are outlined as needed for each.

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.