Adding Customers to the Group

October 2021 v5

Contents

Overview

Purpose

The Groups tab in Illinois workNet allows users to track all case-managed customers assigned to a group. Customers may be added to the group by adding basic information and then completing the program application in Illinois workNet. Other Impacted Individuals are entered by a different method and location.

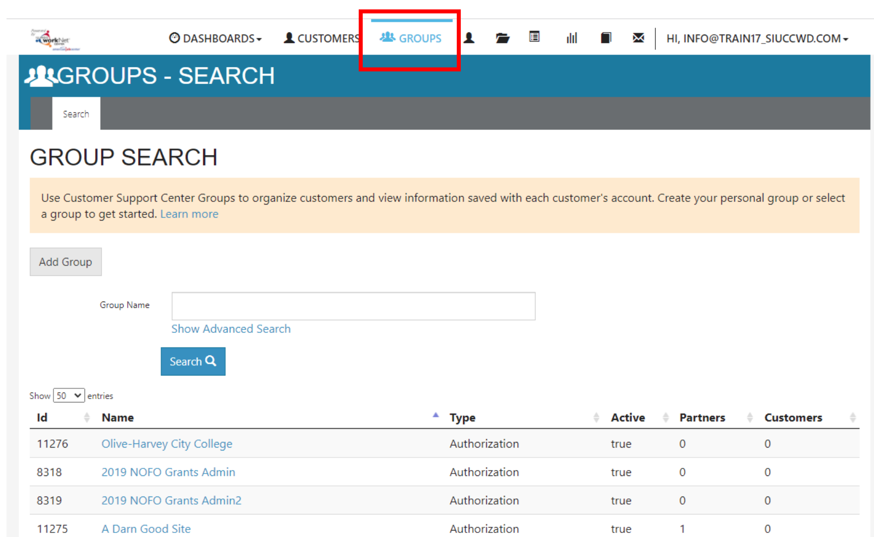
Who Enters/Maintains Data

All Illinois workNet partners with access to Youth Career Pathways can view group members, provide customers the link to the application by adding customers in advance to the group.

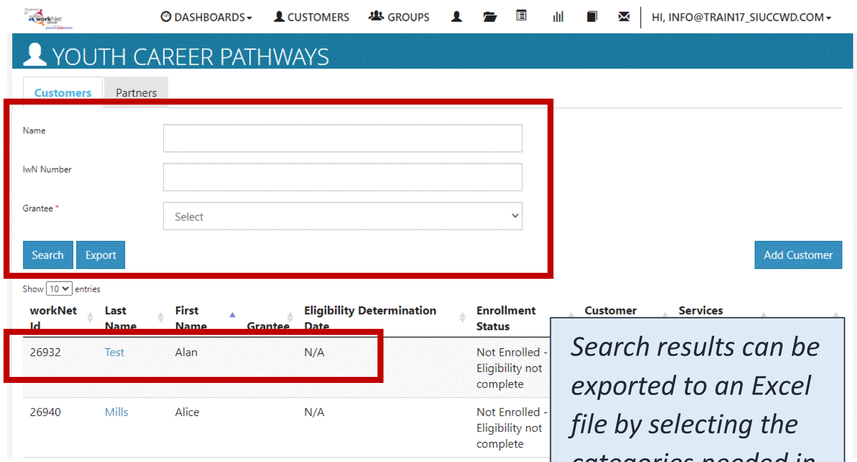
You may direct potential participants to the public Youth Career Pathways program page for more information. Link located here: https://www.illinoisworknet.com/youthcareerpathways/Pages/default.aspx

Access Customer Group

1. Log in to www.illinoisworknet.com.
2. Select My Dashboard.
3. Select Partner Tools.
4. Select Customer Support Center.
5. Select Groups in the top menu.
6. Select a group. ***Youth Career Pathways*** PY21



7. Search for a customer by entering:
    a. Name
    b. Illinois workNet Identification number (six digits)
    c. Intermediary agency if user has access to multiple agencies
    d. Program name
    e. Advanced Search items:
        i. Application Status
        ii. Eligibility Determination Date
        iii. Enrollment Status
        iv. Customer Type
        v. Co-Enrolled in IWDS
        vi. 1st Career Plan Agreement Date
        vii. Services
        viii. Completion Status
        ix. Placement Status
        x. MSG Earned
        xi. Credential Earned
        xii. 30-day Review
        xiii. Integrated Resource Team Contact
8. If customer is found, click customer last name to open file.

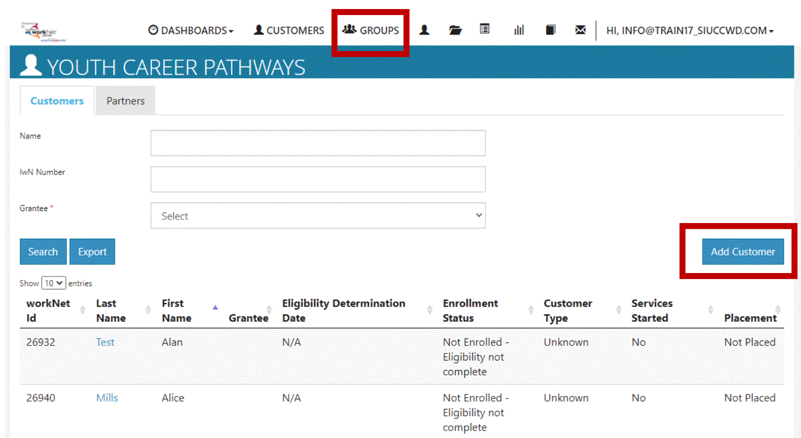


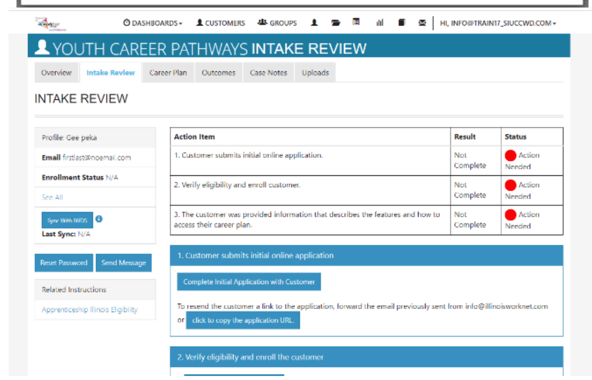
Search results can be exported to an Excel file by selecting the categories needed in the report.

Add Customers

Add case managed customers to the customer group by:

1. Log in to Illinois workNet, select Customer Support Center from Partner Tools. Select Groups page. Select Youth Career Pathways group.
2. Click Add Customer button.
    a. Enter:





i. First Name
ii. Last Name
iii. Date of Birth
iv. Email / Confirm
v. Social Security Number (SSN) / Confirm
vi. Zip Code

b. Select Search for existing customer.
c. Review results. Select an option:
   i. Send customer link to the initial application.
   ii. Complete initial application with customer.
   iii. Add next customer.
d. If Intermediary added more than one customer, to complete initial application with customer follow these steps:
   i. Search customer from group.
   ii. Select Last Name.
   iii. From Intake Review tab (default landing), select 1. Customer submits initial online assessment.
   iv. Select Complete Initial Application with Customer OR if the customer has not yet completed the application Send Customer Link to Initial Application to resend the link.

Selecting Complete Initial Application with Customer opens the Application. Follow the prompts and pages to complete all requested information. Submit the application.

After the customer completes the application, follow the directions for verifying eligibility.