Purpose:

Illinois workNet case note area is a communication tool used to document case notes and send Illinois workNet messages/emails to customers and partners. Case notes provide information related to intake, assessments, referrals, training, placement, employment/training plans, two-way communication, post-exit follow-up, and more. They can be filtered and exported using the tool.

Who Enters/Maintains Data

- Grantee/Provider staff (who do not have access to IWDS) enters case notes into Illinois workNet. Staff can also use the tool to send messages to the customer, partners, and the Illinois workNet Team. The Case Notes populate to IWDS.
- LWIA staff (assisting providers who do not have access to IWDS) enters case notes into IWDS or Illinois worknet. Case Notes entered in IWDS will populate to Illinois workNet. Case Notes entered in Illinois workNet will populate to IWDS. Staff can also use the Case Note tool to send messages to customers, partners, and the Illinois workNet Team.
- Customers receive Case Notes sent as messages in their Illinois workNet account messages. They receive Case Notes sent as emails based on the email that is associated with their Illinois workNet account.

Access Customer Case Note Page

1. Log into 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 Youth Career Pathways.
7. Select the customer's name to access their information.
8. Select the Case Notes tab.

> **Shortcut Tip:**
>
> Go to www.illinoisworknet.com/ycppartners.
>
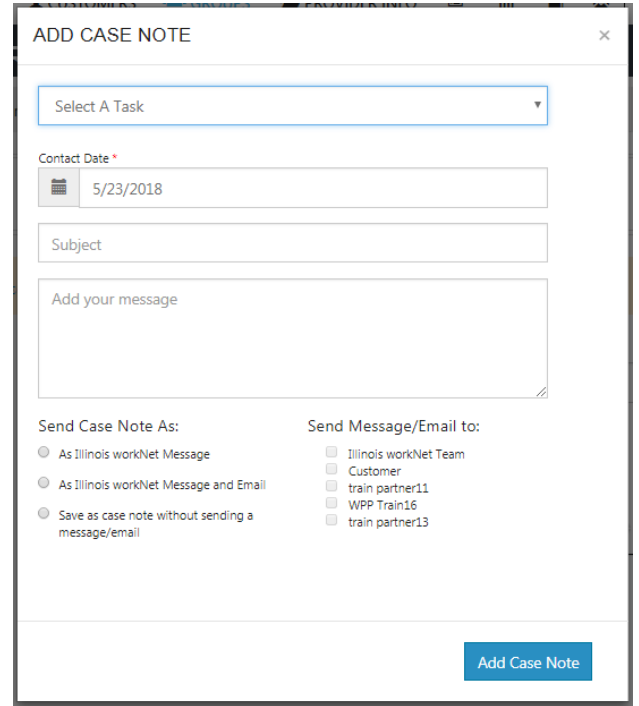> Select the link for Youth Career Pathways Partner Tools.

The Case Note page is a summary:

- Entered on other pages.
- Entered into IWDS.
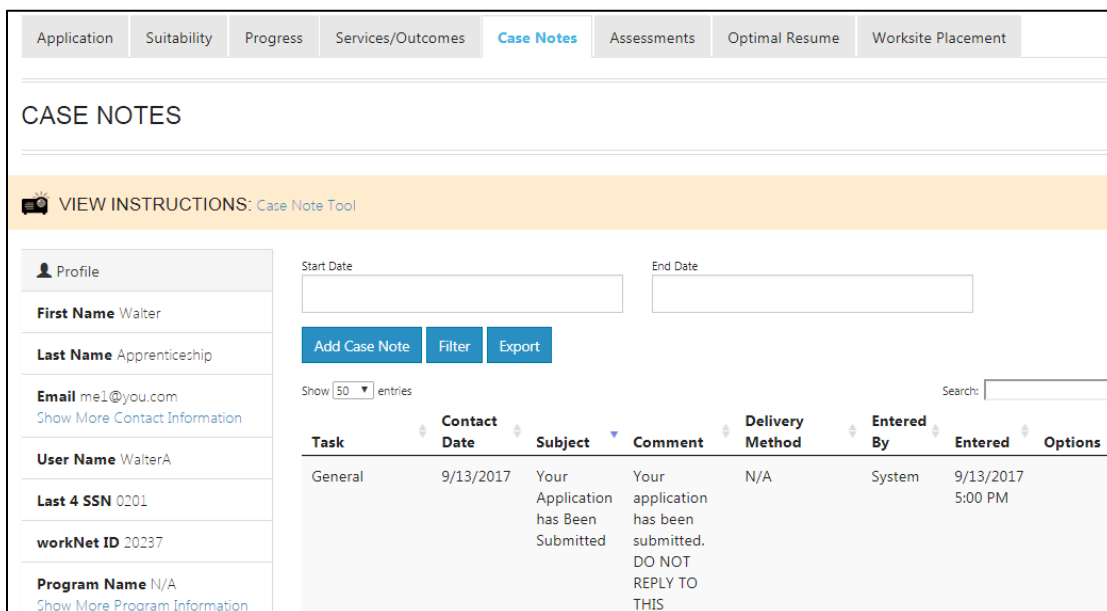- Entered on the Case Note page.

Add Case Note

1. Select Add Case Notes using the Case Note page or one of the other pages.
   a. If you create the Case Note on the Suitability page, it will display on the Suitability page as well as the Case Note page.

b. If you create the case note on the Case Note page, it will only display on the Case Note page (and in IWDS).

2. Select a task (i.e., Assessment, Follow-up, General, Placement, Two Way Communication).
3. Enter the contact date.
4. Enter subject and enter case note.
5. Select how to send the Case Note:
   a. As an Illinois workNet message. This will also save as a Case Note.
   b. As an Illinois workNet message and email. This will go to the email associated with the Illinois workNet account. This will also save as a Case Note.
   c. Save as a Case Note without sending a message/email.
6. If you choose to send it as a message/email, select who the message/email should be sent to.

ADD CASE NOTE ✕

Select A Task ▾

Contact Date *
📅 5/23/2018

Subject

Add your message

Send Case Note As:
○ As Illinois workNet Message
○ As Illinois workNet Message and Email
○ Save as case note without sending a message/email

Send Message/Email to:
☐ Illinois workNet Team
☐ Customer
☐ train partner11
☐ WPP Train16
☐ train partner13

[Add Case Note]

Case Notes can be:

- Filtered by date range.
- Sorted by task, comment, entered by, and date entered.
- Exported into an excel file.

| Application | Suitability | Progress | Services/Outcomes | **Case Notes** | Assessments | Optimal Resume | Worksite Placement |

CASE NOTES

📖 VIEW INSTRUCTIONS: Case Note Tool

👤 Profile

First Name Walter

Last Name Apprenticeship

Email me1@you.com
Show More Contact Information

User Name WalterA

Last 4 SSN 0201

workNet ID 20237

Program Name N/A
Show More Program Information

Start Date _____   End Date _____

[Add Case Note] [Filter] [Export]

Show 50 ▾ entries   Search: _____

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
General	9/13/2017	Your Application has Been Submitted	Your application has been submitted. DO NOT REPLY TO THIS	N/A	System	9/13/2017 5:00 PM	