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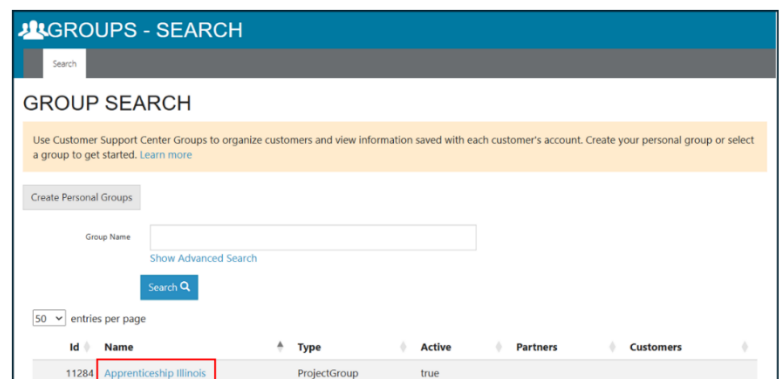
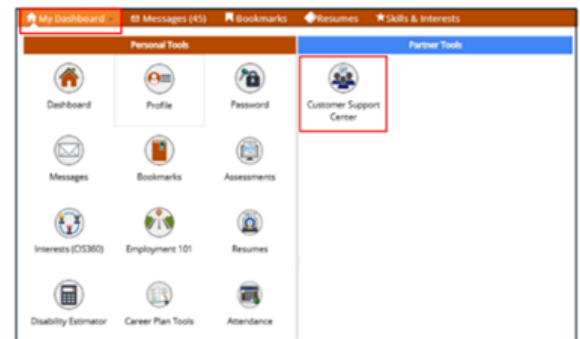
Purpose

The case note area is a communication tool used to document case notes and send messages/emails to customers. 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.

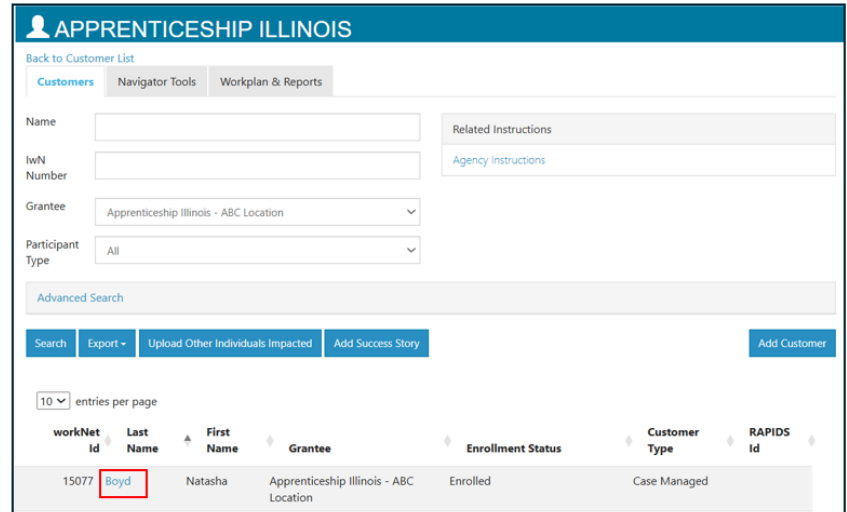
Apprentices receive case notes sent as messages in their Illinois workNet account messages. They receive case notes sent as emails based on the email that is associated with their Illinois workNet account.

Accessing the Apprentice's Case Notes

1. Log into www.illinoisworknet.com.
2. Select **My Dashboard**.
3. Select **Partner Tools**.
4. Select **Customer Support Center**.
5. Select **Apprenticeship Illinois** from the Group Search page.



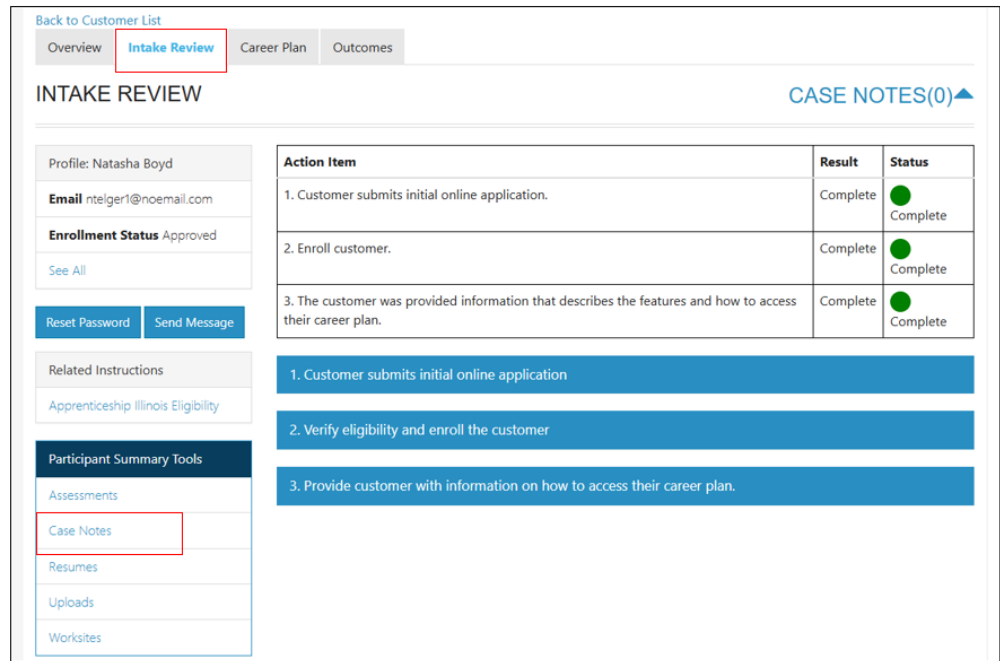
6. Select the **apprentice's last name** to access the profile.



The screenshot shows the 'CUSTOMERS' tab in the Apprenticeship ILLINOIS system. It includes search filters for Name, IwN Number, Grantee, and Participant Type. Below the filters is an 'Advanced Search' section with buttons for Search, Export, Upload Other Individuals Impacted, Add Success Story, and Add Customer. A table lists customer records with columns for workNet Id, Last Name, First Name, Grantee, Enrollment Status, Customer Type, and RAPIDS Id. The record for '15077 Boyd' is highlighted, with 'Boyd' circled in red.

workNet Id	Last Name	First Name	Grantee	Enrollment Status	Customer Type	RAPIDS Id
15077	Boyd	Natasha	Apprenticeship Illinois - ABC Location	Enrolled	Case Managed	

7. After clicking the last name, the **Intake Review** modal will open. Select **Case Notes** from the left menu or a tab.



The screenshot shows the 'INTAKE REVIEW' modal for Natasha Boyd. It includes tabs for Overview, Intake Review, Career Plan, and Outcomes. The 'Intake Review' tab is active. On the left, there is a sidebar with 'Participant Summary Tools' including Assessments, Case Notes (highlighted in red), Resumes, Uploads, and Worksites. The main area displays a table of action items with columns for Action Item, Result, and Status. Below the table are three blue bars corresponding to the action items.

Action Item	Result	Status
1. Customer submits initial online application.	Complete	Complete
2. Enroll customer.	Complete	Complete
3. The customer was provided information that describes the features and how to access their career plan.	Complete	Complete


Case Notes

The **Case Notes** modal displays all case notes that have been entered for the apprentice.



Case Notes can be:

- Filtered using a specific Start and End Date
- Filtered by: (using the arrows at the top of each column)
 - Task
 - Contact Date
 - Subject
 - Delivery Method
 - Entered By
 - Entered
 - Options
- Exported into an excel file


APPRENTICESHIP ILLINOIS - CASE NOTES

Overview

Intake Review

Career Plan

Outcomes

Case Notes

Uploads

CASE NOTES

Profile: Natasha Boyd

Email ntelger1@noemail.com

Enrollment Status Approved

See All

Reset Password

Send Message

Related Instructions

Telling the Story in Case Notes

Case Note Tool (PDF)

Case Note Writing Rubric

Most Recent Case Note Created Date: 06/02/2025 (0 day(s) ago)

Start Date

End Date

Add Case Note

Filter

Export

50

entries per page

Search:

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Follow-Up	06/02/2025 12:00 AM	Follow-Up Note	I called and left a voicemail for the apprentice to call us back this week.	Save as case note without sending a message/email	Maggie O'Leary	06/02/2025 12:35 PM	Delete

Related Instructions

The **related instructions** section provides resources that assist with writing a Case Note.

- Telling the Story in Case Notes
- Case Note Tool (PDF)
- Case Note Writing Rubric



Adding a Case Note

1. Select **Add Case Note**, to open the Add Case Note modal.
 - a. If you create the case note on the Case Note page, it will only display on the Case Note page
2. On the Add Case Note modal, **select a task from the dropdown menu** to indicate why the case note is being written.
3. Enter the **subject** and the **content** for the case note.
4. Select **how to send** the Case Note:
 - a. As an Illinois workNet message. This will also be saved as a Case Note.
 - b. As an Illinois workNet message and email. This will go to the email associated with the Illinois workNet account of the person selected from the list and be saved as a Case Note.
 - c. Save as a Case Note without sending a message/email.
5. If you choose to send it as a message/email, select **to whom** the message/email should be sent.
6. Click **Add Case Note**

ILLINOIS - CASE NOTES

Case Plan Outcomes **Case Notes** Uploads

Most Recent Case Note Created Date: 06/02/2025 (0 day(s) ago)

Start Date: End Date:

Add Case Note Filter Export

50 entries per page Search:

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Follow-Up	06/02/2025 12:00 AM	Follow-Up Note	I called and left a voicemail for the apprentice to call us back this week.	Save as case note without sending a message/email	Maggie O'Leary	06/02/2025 12:35 PM	Delete

ADD CASE NOTE

Select A Task

Contact Date: 6/2/2025

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: Customer

Add Case Note



Deleting a case note

Partners can request to have a case note deleted from an apprentice's profile.

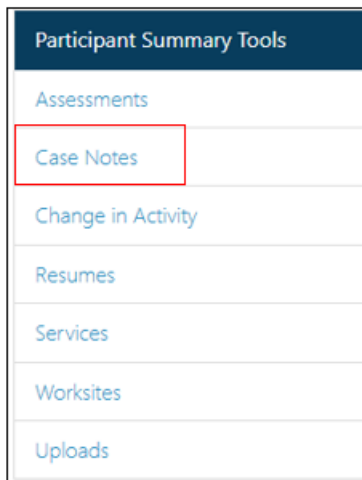
A case note can be requested to be deleted if one or more of the following has occurred:

- The case note was added to the wrong customer.
- The case note is a duplicate.
- The case note information is incorrect.
- The case note includes Personal Identifiable Information (PII).

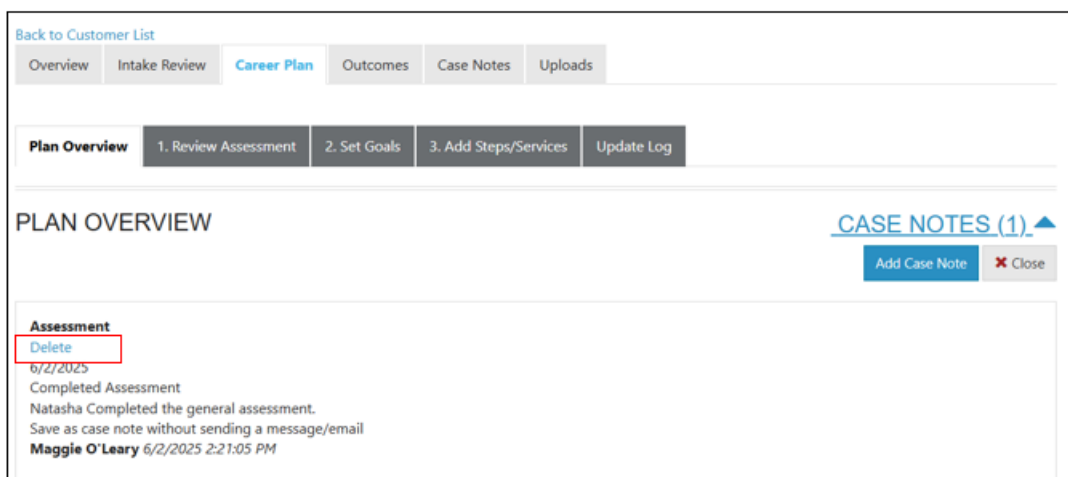
After the request has been submitted, the Grant Manager will review the request.

A case note can be requested to be deleted from the left menu on most profile pages:

- Participant Summary Tools > Case Notes; or,
- Career Plan > any tab.



Add Case Note Filter Export							
50 entries per page		Search: <input type="text"/>					
Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Follow-Up	06/02/2025 12:00 AM	Follow-Up Note	I called and left a voicemail for the apprentice to call us back this week.	Save as case note without sending a message/email	Maggie O'Leary	06/02/2025 12:35 PM	Delete



1. Click the **Delete** button next to the case note that should be removed.



<div> Add Case Note Filter Export </div>							
50 entries per page		Search: <input type="text"/>					
Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Follow-Up	06/02/2025 12:00 AM	Follow-Up Note	I called and left a voicemail for the apprentice to call us back this week.	Save as case note without sending a message/email	Maggie O'Leary	06/02/2025 12:35 PM	Delete

- After clicking Delete, a **drop-down list** is provided with reasons why the case note should be removed.

DELETE CASE NOTE

To submit a request to have a case note deleted, please complete the form below. The request will be sent to your state level program manager for review and approval.

Case Note Deletion Reason *

Select A Reason

Select A Reason
Case note added to the wrong customer
Duplicate case note
Includes Personal Identifiable Information (PII)
Incorrect information in case note
Other

- Select a **reason** that applies and then click Submit Request.

DELETE CASE NOTE

To submit a request to have a case note deleted, please complete the form below. The request will be sent to your state level program manager for review and approval.

Case Note Deletion Reason *

Incorrect information in case note

Submit Request

- The case note shows the status of **Unsubmit**.

- If the case note was deleted in error or does not need to be deleted, click **Unsubmit**.

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Follow-Up	06/02/2025 12:00 AM	Follow-Up Note	I called and left a voicemail for the apprentice to call us back this week.	Save as case note without sending a message/email	Maggie O'Leary	06/02/2025 12:35 PM	Unsubmit Requested Delete: Maggie O'Leary on 06/02/2025 2:29 PM



After a request has been completed by a Program Manager, the new status will display for the case note.

7. A case note that has been **Approved** will show a status of *Deleted on* and the *date*.

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Deleted	Delete Requested on 06/02/2025 2:29 PM	N/A	Delete Reason: Incorrect information in case note	N/A	Delete Requested By: MAGGSO81	Deleted on: 06/02/2025 6:42 PM	

8. A case note that has been **Rejected** will return to the original state, and an email will be sent to the requester.

General	06/02/2025 12:00 AM	Apprentice is Interested	Apprentice called and stated they are interested in the program.	Save as case note without sending a message/email	Maggie O'Leary	06/02/2025 6:47 PM	Delete
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The email will provide details of why the request was rejected.

Reach out to the Grant Manager with any questions.

