

## 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** enters case notes into Illinois workNet. Staff can also use the tool to send messages to the customer, 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](http://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 **Community Youth Employment Program**.
7. Select the **customer's name** to access their information.
8. Select the **Case Notes** tab.

### Shortcut Tip:

Go to [www.illinoisworknet.com/CYEPpartners](http://www.illinoisworknet.com/CYEPpartners).

Select the link to the **Community Youth Employment Program** Partner Tools.

The Case Note page is a summary:

- May be entered on other pages.
- May be entered on the Case Note page.

Additional resources:

[Telling the Story in Case Notes](#)

[Case Note Rubric.pdf](#)

## 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 Progress page, it will display on the Progress 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**. Indicate what caused you to write the case note.
3. Enter subject and case note.

4. 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.

5. If you choose to send it as a message/email, select **to whom** the message/email should be sent.

Select A Task

- Select A Task
- Assessment
- Exit
- Follow-Up
- General
- Individual Employment Plan
- Placement
- Post-Exit Follow-Up
- Referral
- Training
- Two Way Communication: Email
- Two Way Communication: In Person
- Two Way Communication: Not Able to Contact
- Two Way Communication: Phone
- Two Way Communication: Social Media

ADD CASE NOTE

Two Way Communication: Phone

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 at the top of any column.
- Exported into an excel file.
- Filtered by source Illinois workNet (IwN) or IWDS
- Send a case note to IWDS by clicking the option in the far-right column. *The option will not show if the case note has already been sent to IWDS. This does not complete a Sync – only sends the case note.*

**- CASE NOTES**

Overview Intake Review Career Plan Outcomes **Case Notes**

CASE NOTES

Profile: A [redacted]  
 Email: a [redacted]@m  
 Enrollment Status: Registrant  
 See All  
 Sync With IWDS  
 Last Sync: 10/16/2020 9:11 AM  
 Reset Password Send Message

Related Instructions  
 Telling the Story in Case Notes  
 Case Note Tool in Youth Career Pathways (PDF)

Start Date: [ ] End Date: [ ]  
 Add Case Note Filter Export

Show 50 entries Search: [ ]

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Source	Option
General	10/20/2020	Eligibility - Apprenticeship Illinois	A [redacted] completed enrollment and eligibility for Apprenticeship Illinois expansion grant.	N/A	Charles Jones	10/20/2020 2:13 PM	IwN	Send To IWDS
General	10/20/2020	Eligibility - AE	A [redacted] completed enrollment and eligibility for Apprenticeship	N/A	Charles Jones	10/20/2020 2:15 PM	IwN	Send To IWDS