

# **Table of Contents**

Purpose	1
Accessing the Apprentice's Case Notes	1
Case Notes	3
Related Instructions	3
Adding a Case Note	4
Deleting a case note	5

### 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.



SEARCOUPS - SEARC	ЭН				
Search					
GROUP SEARCH					
Use Customer Support Center Groups to a group to get started. Learn more	organize customers and view i	nformation saved with e	each customer's account	. Create your personal grou	p or select
Create Personal Groups					
Group Name					
Show Advanced Search Q	I Search				
50 v entries per page					
Id Name	🕴 Туре	Active	Partners	Customers	+
11284 Apprenticeship Illinois	ProjectGroup	true			



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

	PRENTICES	SHIP ILLINO	IS				
Back to Custo	mer List						
Customers	Navigator Tools	Workplan & Reports					
Name				Related Instructions			
lwN Number				Agency Instructions			
Grantee	Apprenticeship Illino	is - ABC Location	~				
Participant Type	All		~				
Advanced S	Search						
Search E	xport - Upload Oth	er Individuals Impacted	Add Success Story			Add Cust	tomer
10 🗸 ent	ries per page						
workNe I	A	First Name Grantee		Enrollment Status	Customer Type	RAPIDS Id	•
15077	Boyd Nat	asha Apprentices Location	hip Illinois - ABC	Enrolled	Case Managed		

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

ack to Custo	mer List					
Overview	Intake Review	Career Plan	Outcomes			
NTAKE	REVIEW			C/	ASE NC	TES(0)
Profile: Nata	asha Boyd	Actio	n Item		Result	Status
Email ntelger1@noemail.com				initial online application.	Complete	Complete
Enrollment See All	Status Approved	2. Enr	oll customer.		Complete	Complete
Reset Passwo	ord Send Messag		3. The customer was provided information that describes the features and how to access their career plan.			
Related Inst	ructions	1. Cu	ustomer submi	its initial online application		
Apprentices	hip Illinois Eligibility	2. Ve	erify eligibility a	and enroll the customer		
Participant S	Summary Tools					
Assessments	5	3. Pr	ovide custome	er with information on how to access their career plan.		
Case Notes						
Resumes						
Uploads						
Worksites						



#### **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)
  - o Task
  - Contact Date
  - Subject
  - o Delivery Method
  - o Entered By
  - o Entered
  - o Options
- Exported into an excel file

APPRENTICES	HIP ILL	INOIS	- CASE	E NOTES				
Overview Intake Review Car	eer Plan Ou	utcomes	ase Notes	Uploads				
ASE NOTES								
rofile: Natasha Boyd	Most Recer	nt Case Note	Created Date:	06/02/2025 (0 day(s) a	go)			
Email ntelger1@noemail.com End Date End Date								
Enrollment Status Approved								
See All	Add Case	Note Filte	r Export					
Reset Password Send Message	50 🗸	entries per pa	ige			Search:		
	Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered 🌘	Options
Related Instructions	Follow- Up	06/02/2025 12:00 AM	Follow-Up Note	I called and left a voicemail for the	Save as case note without	Maggie O'Leary	06/02/2025 12:35 PM	Delete
Telling the Story in Case Notes				apprentice to call us				
Lase Note Tool (PDF)				back this week.	message/email			

#### **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
- 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.
  - 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

PIL		S - CAS		TES				
lan	Outcomes	Case Notes	Uploads					
Aost R	ecent Case No	te Created Date	: 06/02/2025	(0 day(s) a	go)			
art Date				End Date				
Add C	ase Note F	ilter Export						
50	✓ entries per	r page				Search:		
	Contact				Delivery	Entered		
Task		Subject	Comment	t	Method	Ву	Entered	Options

ADD CASE NOTE	
Select A Task	~
Contact Date *	
6/2/2025	
Subject	
Add your message	
	4
Send Case Note As:	
Send Case Note As:	Send Message/Email to:
As Illinois workNet Message	Send Message/Email to: Customer
<ul> <li>As Illinois workNet Message</li> <li>As Illinois workNet Message and</li> </ul>	
<ul> <li>As Illinois workNet Message</li> <li>As Illinois workNet Message and Email</li> <li>Save as case note without</li> </ul>	



#### **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.

Participant Summary Tools	Add Ca	se Note Filte	r Export					
Assessments	50 🗸	entries per p	age			Search:		
Case Notes	Task	Contact Date	Subject 💧	Comment	Delivery Method	Entered By	Entered 🔶	Options
Change in Activity	Follow Up	- 06/02/2025 12:00 AM	Follow-Up Note	I called and left a voicemail for the apprentice to call us	Save as case note without sending a	Maggie O'Leary	06/02/2025 12:35 PM	Delete
Resumes				back this week.	message/email			
Services								
Worksites								
Uploads								
Back to Customer List								
Overview Intake Review Career Plan Outcomes	Case Not	es Uploads						
Plan Overview 1. Review Assessment 2. Set Goals	3. Add Ste	ps/Services U	lpdate Log					
PLAN OVERVIEW				CA	SE NOTES	<u>(1)</u>		
					Add Case Note	X Close		
Assessment Delete 6/2/2025 Completed Assessment Natasha Completed the general assessment. Save as case note without sending a message/email Maggie O'Leary 6/2/2025 2:21:05 PM								

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



Add Case	Note Filter	Export					
50 🗸	entries per pa	ge			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

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



3. Select a reason that applies and then click Submit Request.



- 4. 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.	note without	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 Apprentice Apprentice 12:00 AM is called and Interested stated they ar interested in the program.	Save as case Maggie 06/02/2025 Delete note without O'Leary 6:47 PM sending a message/email
--	---

The email will provide details of why the request was rejected.

Reach out to the Grant Manager with any questions.

Rejected Case Note Deletion Request
Illinois workNet <donotreply@illinoisworknet.com> To Al Bundy () Click here to download pictures. To help protect your privacy. Outlook prevented automatic download of some pictures in this message.</donotreply@illinoisworknet.com>
Your request to delete case note for Customer with workNet ID 6121 has been rejected.
Request rejected notes were add by: Seven Programs
Rejection Reason notes: More information is needed.
Please follow up with your Program Manager regarding any questions.
Sincerely,
Illinois workNet Team
info@illinoisworknet.com Office Hours: 8:00 a.m 4:30 p.m. (Monday - Friday except holidays and administrative closures.)

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