

Customer Groups / Teams

Giving Partners Access to Customers 5/2017 Final

Purpose: Customer Groups and Teams allow the system to control staff access to customer information.

Access Levels:

- 1. <u>Super User</u> Statewide Staff (Ex: DCEO Staff) see statewide information and use a dropdown menu to see specific regional information.
- 2. <u>Career Planner/Case Worker</u> Career Planners (Ex. LWDA Staff) have access to customer information for their region(s).
- **3.** <u>Partner</u> Partners have limited access to a subset of customers. They are provided access to customers through teams. Partners can be on 1 or more teams. Examples:
 - o K-12 partner (ex: District 99)
 - Postsecondary partner (ex: College of DuPage)
 - Support service provider
 - Employer

Information Available For Each Access Level:

Super User	Career Planner/Case Worker	Partner
View statewide information that	View regional information that	View team level information that
includes:	includes:	includes:
All dashboard views for statewide	All dashboard views for their	All dashboard views for their
and region levels that link to	region(s) that link to	region but <u>do not</u> have access to
reports/customer information.	reports/customer information.	reports/customer information.
Reporting ability for statewide	Reporting ability for their	Access to <u>most</u> customer
and region levels.	region(s).	information collected for the
Access to <u>all</u> customer	Access to <u>all</u> customer	program for customers that are
information collected for the	information collected for the	added to their team(s). They do
program.	program for their region(s).	not see customer contact
		information or private
		information from IWDS.

How to Provide Access to Customer Support Center Groups/Program Information:

- 1. Partners must have their location set up in Illinois workNet Services Finder.
- 2. Partners must have an Illinois workNet account.
- 3. Provide a list of Illinois workNet Partners and the access level to info@illinoisworknet.com to give them access to the DEI Customer Groups. Include the following information:
 - a. First & Last Name
 - b. Email
 - c. Level of access career planner/case worker or partner.

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d. Partner Type: K-12, Post-Secondary, Support Service, etc.

Provide Partners Access to Customer/Program Information Through Teams:

Career planners/case workers can set up teams and add other career planners/case workers, partners and customers to the teams. This is the only way a person with partner level access can access customer program information.

Your region can have an unlimited number of teams, but here are some things to consider before you set up teams:

- There is a minimum of one partner on a team.
- Partners can be on multiple teams.
- Customers can be on multiple teams.
- Partners and customers can be added and removed from teams.
- Common format for team names.

Steps for creating a team:

- 1. Log into DEI Partner Program Tools using an account with career planner/case worker level access.
- 2. Select teams and add a team.
- 3. Enter the team name and team description. Save.
- 4. Select Team Details.
 - a. Updated group name/description as needed.
 - b. Add partners
 - c. Add customers