

Purpose:

Customer Services Report provides a list of services provided to customers by project or a Customer Support Center group. The list identifies the Illinois Workforce Development System (IWDS) service if applicable, the status of the service, and the customer who have/do not have the listed service. The report provides the ability to update services for multiple customers at one time.

Who Enters/Maintains Data

Grantee/Provider staff run the Customer Services Report to:

1. View/Export the complete or filtered list of services associated with customers that includes the status of each service.
2. Update services at a group level by accessing a filtered list of customers who have a specific service.

Access Customer Services Report

1. Log into www.illinoisworknet.com.
2. Select **My Dashboard**.
3. Select **Partner Tools**.
4. Select **Customer Support Center**.
5. Select **Reports icon** in the top menu.
6. Select **Customer Services Report**.



How to use the Customer Services Report

1. Select a **project**. (Note: If you are using the report to view a customer status for your personal group, select Illinois workNet.)
2. Use the other **filters** to narrow down search results.
3. Use the **Export** button to export the list of services with the number of customers in each status column.
4. Use the **search** to filter services by key word.
5. **Select the number** links in the table to get a filtered list of customers. The table includes sortable columns for the service and status.

- a. **Step/Service** is the name of the step in Illinois workNet. If this is N/A, the service came from IWDS and has not been sync'd with an Illinois workNet service.
- b. **IWDS Activity Name** is the crosswalked IWDS activity for the Illinois workNet step. If this is N/A, the Illinois workNet service has not been crosswalked to an IWDS activity.

Step/Service	IWDS Activity Name	IWDS Service Type	Not Started	Started	Successful Completion	Unsuccessful Completion	Total Customers with Step/Service	Total Customers without Step/Service
*Get Started: Learn how to prepare to find a job.	Labor Market Information	Self Service	0	0	1	0	1	494
Attend adult education and literacy classes.	Basic Academic Training	Academic Learning Service	78	0	0	0	78	417

- c. **IWDS Service Type** is the crosswalked IWDS activity for the Illinois workNet step. If this is N/A, the Illinois workNet service has not been crosswalked to an IWDS service type.
- d. **Not started** is the service status for customers who have the service in their career plan, but it does not have a started/open status.
- e. **Started** is the service status for customers who have the service in their career plan with a started/open status. This can also include IWDS services that populated into Illinois workNet automatically, and may or may not be in the career plan.
- f. **Successful Completion** is the service status for customers who have the service in their career plan with a successful completion status. This can also include IWDS services that populated into Illinois workNet automatically and may or may not be in the career plan.
- g. **Unsuccessful Completion** is the service status for customers who have the service in their career plan with an unsuccessful completion status. This can also include IWDS services that populated into Illinois workNet automatically, and may or may not be in the career plan.

Update Customer Services Using the Services Report

There are two ways to update services:

1. Use the online form – This is a great option for partners who will log into the tools to update information.
2. Use the Export/Import – This is a great option for partner who provide services but may not commit to logging into the tools to provide service updates.

Both ways can update customers who:

- Have services in their Career Plan
- Do not have services in their Career Plan

It is important to understand the basic purpose and requirements for the Illinois workNet Career Plan. The Career Plan is a tool that case workers and/or career navigators can use with their customers to:

- Review assessment results.
- Create goals based on assessment results.
- Identify steps/services needed to achieve those goals.
- Document current status and flags when intervention is needed.

Customers can access their career plan information in My Dashboard. They can update the self-service steps in their workNet Career Plan.

Since the Career Plan is used as a communication tool with the customer, there are certain fields that are required because it is a plan.

- **Goals are identified.**
- **All steps are associated with a goal.**
- **All steps have a planned start date, planned due date, planned weekly hours. This is for planning purposes.**
- **Once started, the actual start date is recorded.**
- **Once complete, the actual end is recorded.**
- Other optional fields are available to communicate/document more details.

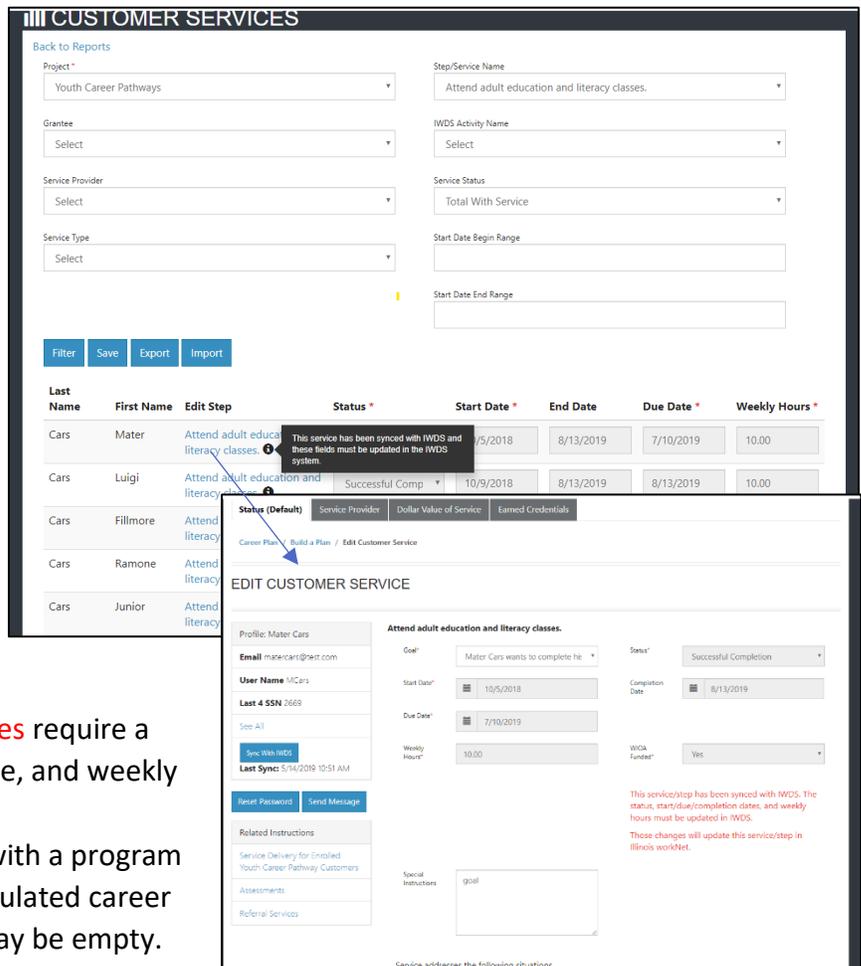
Update Customers Who have Steps Using Online Form

1. Once a number link is selected in the table, a **filtered list of customers** is available with step/service fields that can be updated.

2. **Services that have the info bubble and grayed out fields come from IWDS.** That means the status, dates and hours need to be updated in IWDS. Other data associated with the service can be updated by selecting the link to the service. For example, the goal, special instructions, situations, credentials, etc. can be updated in order to update the customer's career plan.

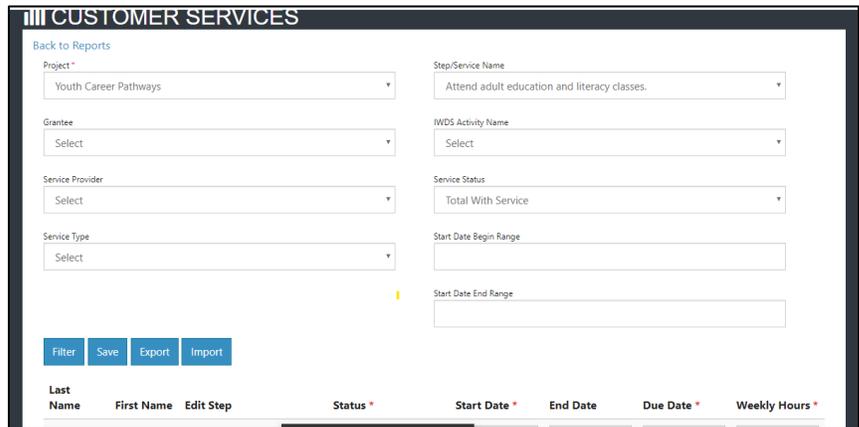
3. Services that are not grayed out can be updated in Illinois workNet. There are several different statuses:

- a. **Planned/Not Started services** require a start date, planned due date, and weekly hours.
 - i. If you are working with a program that used a pre-populated career plan, these fields may be empty. Those fields are required when the service is updated.
 - ii. If the service is added to a career plan, select the service link and it will open the service screen in a new window for easy access to update the full details for the customer. The service will need to be associated with a goal.
- b. **Started/Open services** a start date, planned due date, and weekly hours. This service can be updated in Illinois workNet if it is not required for it to be documented in IWDS. If the service is required to be in IWDS, make sure IWDS uses the same start date, IWDS activity, IWDS service type. Then, the IWDS service will sync with the planned service that is already in the customers career plan. Once synced Illinois workNet will automatically update when IWDS is updated.
- c. **Successful and Unsuccessful Completion** a start date, end date, and weekly hours. This service can be updated in Illinois workNet if it is not required for it to be documented in IWDS. If the service is required to be in IWDS, make sure IWDS uses the same start date, IWDS activity, IWDS service type. Then, the IWDS service will sync with the planned service that is already in the customers career plan. Once synced Illinois workNet will automatically update when IWDS is updated.



Update Customers Who have Steps Using Export/Import

- Once a number link is selected in the table, a **filtered list of customers** is available with step/service fields that can be updated.
- Select the **Export** button to export an Excel file with the following columns that can be updated. **NOTE: There will be one service per export**, but there can be multiple statuses included in an export.



The screenshot shows the 'CUSTOMER SERVICES' interface. It includes a 'Back to Reports' link and several filter dropdown menus: Project (Youth Career Pathways), Step/Service Name (Attend adult education and literacy classes), Grantee (Select), IWDS Activity Name (Select), Service Provider (Select), Service Status (Total With Service), Service Type (Select), Start Date Begin Range, and Start Date End Range. Below the filters are buttons for Filter, Save, Export, and Import. At the bottom, a table header is visible with columns: Last Name, First Name, Edit Step, Status, Start Date, End Date, Due Date, and Weekly Hours.

- Customer Service ID = Do not change.
 - Last Name = Do not change.
 - First Name = Do not change
 - Step Name = Do not change
 - Sync with IWDS = Do not Change
 - Service Status** = Update as needed with the following status (Format – use the exact text)
 - Planned/Not Started
 - Started/Open
 - Successful Completion
 - Unsuccessful Completion
 - Start Date** = Update this field with the planned or actual start date. (Format – mm/dd/yyyy)
 - End Date** = Update this field if the service status is either successful completion or unsuccessful completion. (Format – mm/dd/yyyy)
 - Due Date** = Update this field with the planned due date. It is required but only for planning purposes and communicating the goal end date for the customer. This is required for each status. It does not have to match the end date. (Format – mm/dd/yyyy)
 - Weekly Hours** = Update this field to identify the planned number of hours the customer is expected to spend on this service in a week. This information is required for updating the service. (Format - Number only)
- Send the spreadsheets to your partner who is providing the service and ask them to update the service status, start date, end date, due date and weekly hours. Provide the **Partner Instructions** below so they know how to update the spreadsheets.
 - Once the provider returns the spreadsheet, **check to make sure it is formatted correctly**. If there is incomplete required information for a customer, remove that line before uploading into the system.
 - Go back to your **filtered list of customers** and select **Import**.
 - Upload** the file and refresh the page to see the updates.
 - Select the **service link** to update additional details for the customer’s specific service.

Partner Instructions: Updating Service Export Files

Dear (partner name),

We are in the process of updating our customers' career plans to reflect services they have received from our partners. You have the option of:

1. Logging into the partner tools and updating the information directly into the system; or
2. Update the attached spreadsheet and we will upload the information into the system.

If you are using the spreadsheet option, you will find there is one spreadsheet for each of the following services:

- List service 1
- List service 2
- List service 3, etc.

For each of these spreadsheets, please update the following columns using the specified format.

- **Service Status** = Update as needed with the following status (Format – use the exact text)
 - Planned/Not Started
 - Started/Open
 - Successful Completion
 - Unsuccessful Completion
- **Start Date** = Update this fields with the planned or actual start date. (Format – mm/dd/yyyy)
- **End Date** = Update this field when the service status is either successful completion or unsuccessful completion. (Format – mm/dd/yyyy)
- **Due Date** = Update this field with the planned due date. It is required but only for planning purposes and communicating the goal end date for the customer. This is required for each status. It does not have to match the end date. (Format – mm/dd/yyyy)
- **Weekly Hours** = Update this field to identify the planned number of hours the customer is expected to spend on this service in a week. This information is required for updating the service. (Format - Number only)

If you have provided other services that you would like to have documented into their career plan, please let us know and we will make sure they are included.

We would like to have the information updated by MM/DD/YYYY. Please let us know if enough time to complete this task.

Sincerely,