



General Revenue Funds (GRF) System Updates & Technical Assistance

AGENDA

Demonstration

- Housekeeping
- Recent System Updates
- Case Notes
- Outcomes – Closing out a customer
- Submitting a Help Request
- Question & Answer

Housekeeping

GRF System Updates and Technical Assistance is presented by:

- Heather Lawrence – Business Analyst, Illinois workNet
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- Ruth Whitis – Central Illinois Regional Workforce Manager, Office of Employment and Training

Mute/Raise Hand

- When you joined the call today, you joined muted. Please remain muted until the Question & Answer session. During that session, you may unmute yourself and ask questions.
- The call is being recorded and will be posted to the [GRF partner page](#) in the [Technical Assistance, Tutorials, & Videos](#) section.
- Questions can be put in the chat during the call, and we will be sure to answer them.

Recent System Updates – Outreach Events

Resolved the issue so all Grantees no longer see all Outreach Events.

TIP - A list of all system updates is available in the [Partner Tool Updates](#) section on the GRF Partner page.

The **Outreach** section of an organization was showing all Outreach Events for all LWIA's. Now it only displays Outreach Events for the specific LWIA

GRF PROGRAM REPORTING SYSTEM

Back to Customer List

Customer Information **Capacity Building** Work Plan & Reports Planned vs. Actual GRF Glossary

Outreach Events **Organization Information** Projects Notes Resources

Organization Name WALGREEN CO.

Doing Business As Name WALGREENS

Location Address
5100 Lake Ter NE
Mount Vernon, IL 62864

County
[Update map location](#)

Phone 6182423801

Web Page Address www.walgreens.com

This organization is in a state or federal underserved area.
Yes

FEIN

Number of Employees 160 (Large)

NAICS 493110

Industry

Small Business No

Female Owned No

Minority Owned No

Standalone Organization No

OUTREACH EVENTS [Add Outreach Event](#)

10 entries per page

Outreach Name	Outreach Audience	Outreach Type	Number of Attendees	Event Date	View
STEP Forward Workshop for Justice Involved Individuals	Individual	Business Services Team Initiated	5	02/11/2025	View
Step Forward	Individual	Business Services Team Initiated	6	02/18/2025	View
Step Forward	Individual	Business Services Team Initiated	5	02/25/2025	View
Step Forward	Individual	Business Services Team Initiated	5	03/04/2025	View
Step Forward	Individual	Business Services Team Initiated	5	03/11/2025	View
Step Forward	Individual	Business Services Team Initiated	6	03/18/2025	View
McHenry County College Job Fair	Individual	Community/Membership Event/Meetings	50	01/29/2025	View
McHenry County College Job Fair	Individual	Community/Membership Event/Meetings	50	10/16/2024	View
Outreach Kiosks	Individual	Cold Calls (phone, email, mailers)	10	05/01/2025	View
Spotlight Tuesday - Accurate Personnel	Individual	Community/Membership Event/Meetings	10	08/13/2024	View

Showing 1 to 10 of 88 entries

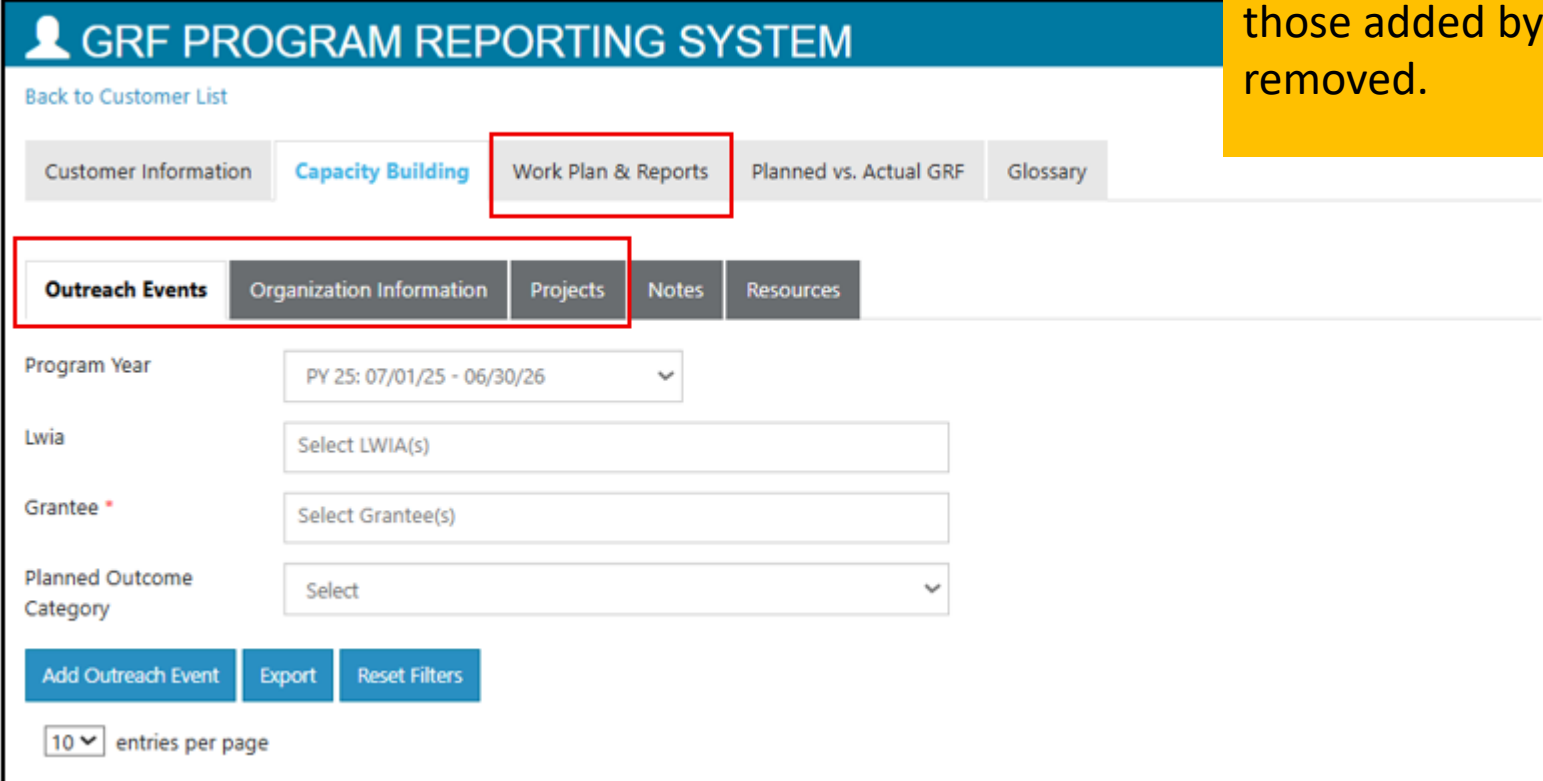
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Recent System Updates – Super Admin Delete

Super Admin users can **delete** the following from the system:

- Outreach Events
- Organizations
- Projects
- Work Plans
- Narrative Reports

Submit a **Help Request** to have duplicate entries or those added by mistake removed.



The screenshot displays the 'GRF PROGRAM REPORTING SYSTEM' interface. At the top, there is a navigation bar with a user icon and the system name. Below this, a 'Back to Customer List' link is visible. The main navigation area consists of several tabs: 'Customer Information', 'Capacity Building', 'Work Plan & Reports', 'Planned vs. Actual GRF', and 'Glossary'. The 'Work Plan & Reports' tab is highlighted with a red box. Underneath, a sub-navigation bar includes 'Outreach Events', 'Organization Information', 'Projects', 'Notes', and 'Resources'. The 'Outreach Events' tab is also highlighted with a red box. Below the navigation, there are several filter fields: 'Program Year' (set to 'PY 25: 07/01/25 - 06/30/26'), 'Lwia' (with a 'Select LWIA(s)' dropdown), 'Grantee *' (with a 'Select Grantee(s)' dropdown), and 'Planned Outcome Category' (with a 'Select' dropdown). At the bottom, there are three buttons: 'Add Outreach Event', 'Export', and 'Reset Filters'. A pagination control shows '10 entries per page'.

Recent System Updates – Incumbent Worker Upload File

Incumbent Workers should only be added to the Incumbent Worker section for an organization.

The previous upload required that all fields be completed.

The upload file was updated to only require the worker's **first name**, **last name**, and **date of birth** upon first upload.

After the initial upload, fields can be completed as needed.

The screenshot displays the 'GRF PROGRAM REPORTING SYSTEM' interface. The top navigation bar includes 'Back to Customer List', 'Customer Information', 'Capacity Building', 'Work Plan & Reports', 'Planned vs. Actual GRF', and 'Glossary'. A secondary navigation bar shows 'Outreach Event', 'Organization Information', 'Projects', 'Notes', and 'Resources'. The main content area is divided into a map on the left and a form on the right. The map shows a location in Champaign, IL, with a red pin. The form is titled 'INCUMBENT WORKER' and includes a table for adding workers. The table has columns for 'Company Name', 'Status', 'Start Date', 'End Date', 'View Participants', and 'Edit Project'. Below the table, there are input fields for 'Customer ID (System Generated)', 'First Name *', 'Last Name *', and 'Date of Birth (Must Be 16+) mm/dd/yyyy'. The 'Organization Information' tab is active, showing details for 'Midwest Television, Inc.', including its location address and FEIN.

GRF PROGRAM REPORTING SYSTEM

Back to Customer List

Customer Information Capacity Building Work Plan & Reports Planned vs. Actual GRF Glossary

Outreach Event Organization Information Projects Notes Resources

INCUMBENT WORKER Add Incumbent Worker Project

Company Name	Status	Start Date	End Date	View Participants	Edit Project
Customer ID (System Generated)	First Name *	Last Name *	Date of Birth (Must Be 16+) mm/dd/yyyy		

Organization Name: Midwest Television, Inc.

Location Address: 100 W University Ave, Champaign, IL 61820

County: [Update map location]

FEIN: []

Number of Employees: 0

NAICS: 516120

Industry Information: []

Recent System Updates – Case Notes

A case note can be added in two ways.
The first option is through the **Progress** tab.

The screenshot shows the 'GRF PROGRAM REPORTING SYSTEM - PROGRESS' interface. At the top, there are tabs for 'Progress' and 'Case Notes'. Below the tabs, the 'PROGRESS' section is active. On the right side of this section, there is a link 'CASE NOTES(0)' with an upward-pointing arrow icon. A red box highlights this link, and a red arrow points from it to a yellow callout box below.

This link provides case note instructions.

This screenshot shows the 'ADD CASE NOTE' modal form. The 'Case Note Type' is set to 'General'. The 'Tied To' dropdown menu is open, showing options: 'Select', 'Profile', 'Service Level', 'Services', and 'Outcomes'. A red arrow points from the 'Tied To' field in the modal to the 'Tied To' dropdown menu in the adjacent screenshot.

This screenshot shows the 'ADD CASE NOTE' modal form with the 'Tied To' dropdown menu open. The 'Profile' option is selected and highlighted in blue. The 'Contact Date' is set to 03/20/2026. The 'Subject' field contains 'Subject'. The 'Comment' field contains 'Add your message'. The 'Add Case Note' button is visible at the bottom right.

This screenshot shows the 'PROGRESS' page after a case note has been added. The 'CASE NOTES(1)' link is now highlighted in a red box. The case note details are displayed in a box below the 'Add Case Note' button. The details include: 'Tied To: Profile', 'Category: General', 'Contact Date: 03/20/2026 6:59 AM', 'Subject: Becky Morris Application', and 'Comment: Completed Becky's application in the office.' The 'Entered By: Miranda Millany' and 'Entered: 03/20/2026 6:59 AM' are also shown.

Recent System Updates – Case Notes

The second way to add a case note is on the **Case Notes** tab.

The **Related Instructions** section provides additional resources to assist with writing Case Notes.

GRF PROGRAM REPORTING SYSTEM - CASE NOTES

Back to Customer List

Overview **Case Notes**

CASE NOTES

Most Recent Case Note Created Date: 03/20/2026 (0 day(s) ago)

Start Date: End Date:

Add Case Note Filter Export

50 entries per page Search:

Category	Tied To	Contact Date	Subject	Comment	Entered By	Entered	Options
General	Profile	03/20/2026 6:59 AM	Becky Morris Application	View Case Note Completed Becky's ap	Miranda Millany	03/20/2026 6:59 AM	Delete

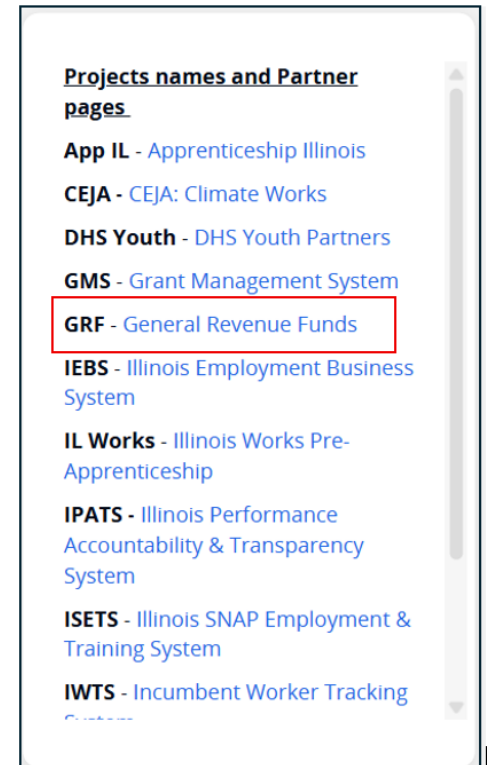
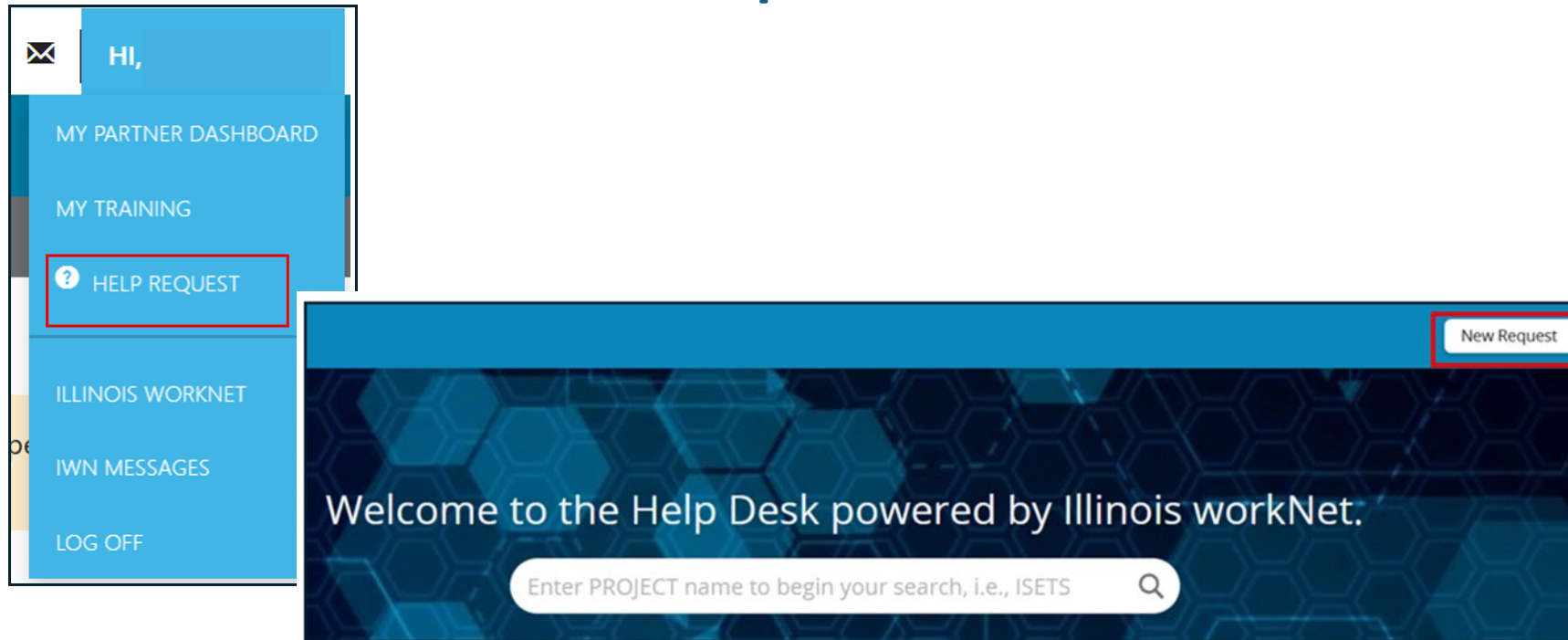
Showing 1 to 1 of 1 entry

« < 1 > »

Click **Delete** to remove a Case Note.

Demonstration

We're Here to Help



If you experience any system issues or have questions, please don't hesitate to submit a **New Request** through the Help Desk.

When submitting your request, include as much detail as possible – such as screenshots, error messages, or the steps you were taking – so we can resolve the issue efficiently.

Scroll down to the bottom of the Help Desk to click on the link for the [GRF Partner Guide](#).

Questions

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Answers

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