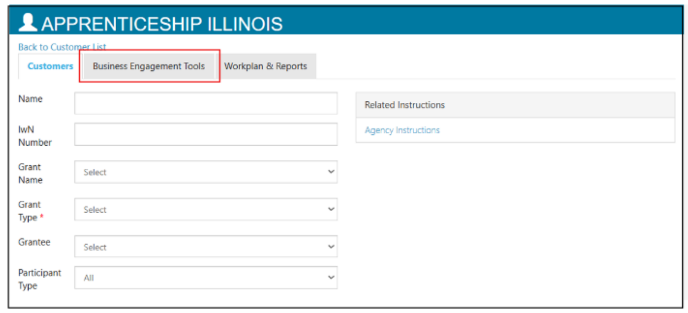
Adding an Outreach Event
July 2026

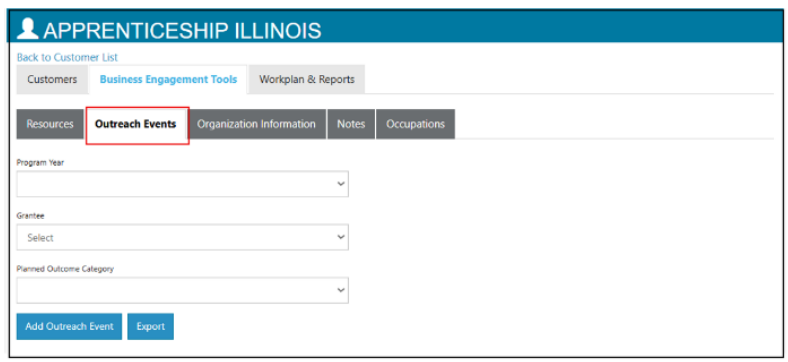
Table of Contents

Accessing Business Engagement Tools

1. Select Business Engagement Tools



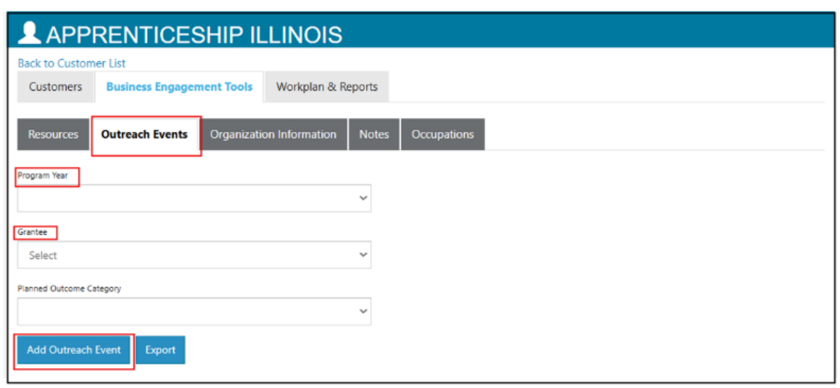
2. Select Outreach Events



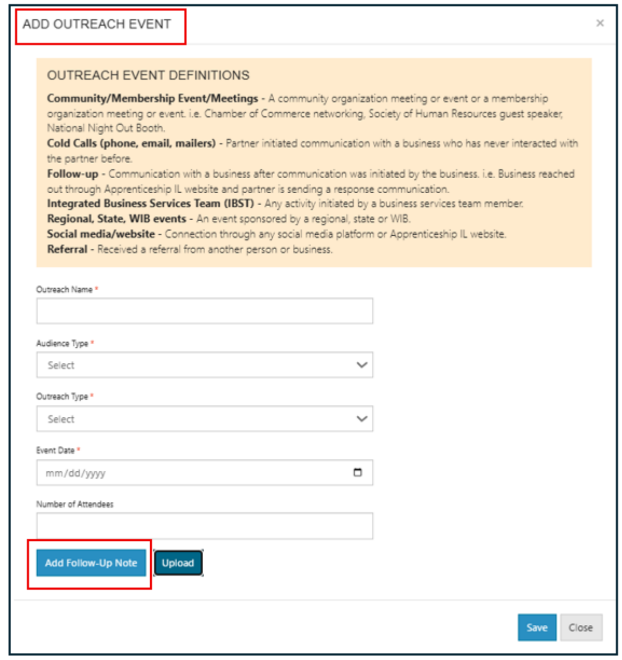
Add Outreach Event

Outreach Events document business and individual engagement in the system.

1. On the Outreach Events tab, filter for:
   - Program Year
   - Grantee
2. Click Add Outreach Event

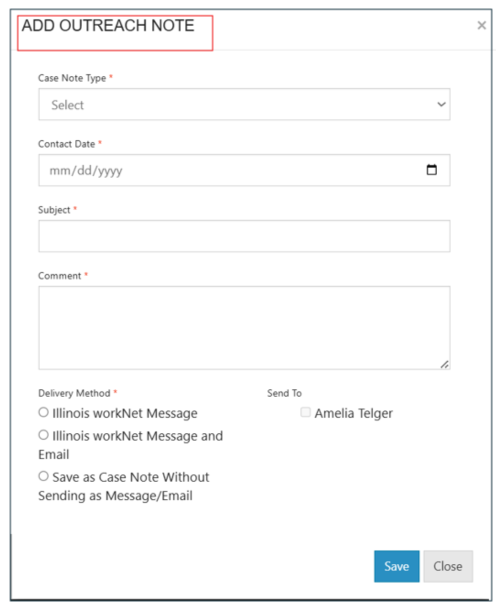


3. Complete the Add Outreach Event modal:
   - Outreach Name*
   - Outreach Type* – See definitions of event types at the top of the modal.
   - Event Date*
   - Number of Attendees

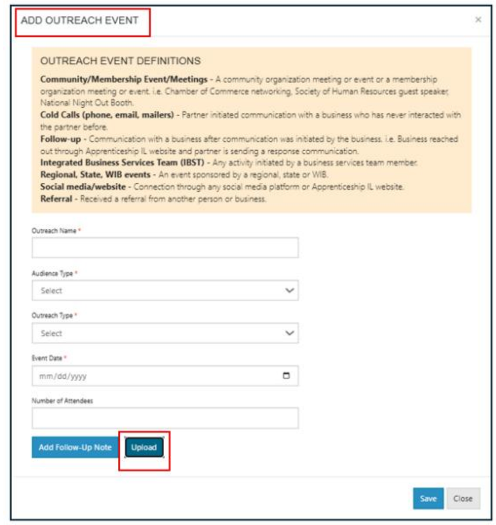


4. Select Add Follow-Up Note to add a note about the Outreach Event.

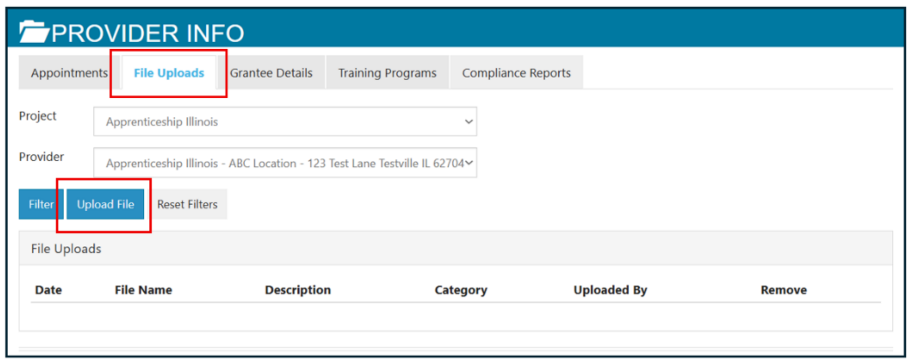
5. Complete the Add Outreach Note modal:
   - Case Note Type*
   - Contact Date*
   - Subject*
   - Comment*
   - Delivery Method*
     - Select how to send the Case Note:
       - As an Illinois workNet message. This will also be saved as a Case Note.
       - As an Illinois workNet message and email. 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.
       - Save as a Case Note without sending a message/email.
     - Send Message/Email to
       - If you choose to send it as a message/email, select to whom the message/email should be sent.



6. From the Add Outreach Event modal, select Upload to upload documents related to the Outreach Event.



7. Clicking Upload will take you to the Provider Info section. The Provider Info section will open the File Uploads tab.



8. Click Upload File

9. Complete the Upload File modal:

- Select a Category from the dropdown list.
- Choose the file
- Provide a detailed description
- Click Upload

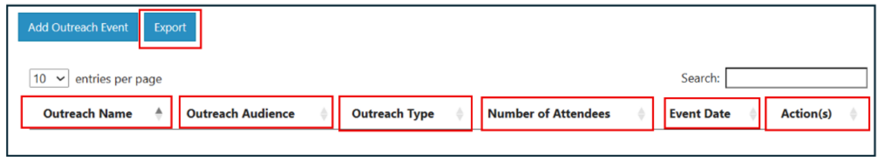
The upload details will display in the table after it has been uploaded.

10. Go back to the Outreach Event and click Save.

11. The new Outreach Event will be displayed in the Outreach Events list.

12. Filter the events using the up/down arrows:

- Outreach Name
- Outreach Audience
- Outreach Type
- Number of Attendees
- Event Type



13. Click See Notes in the right-hand column of the Outreach Events list to add additional follow-up notes.

14. Click Export on the list of events to obtain a list of all events.

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