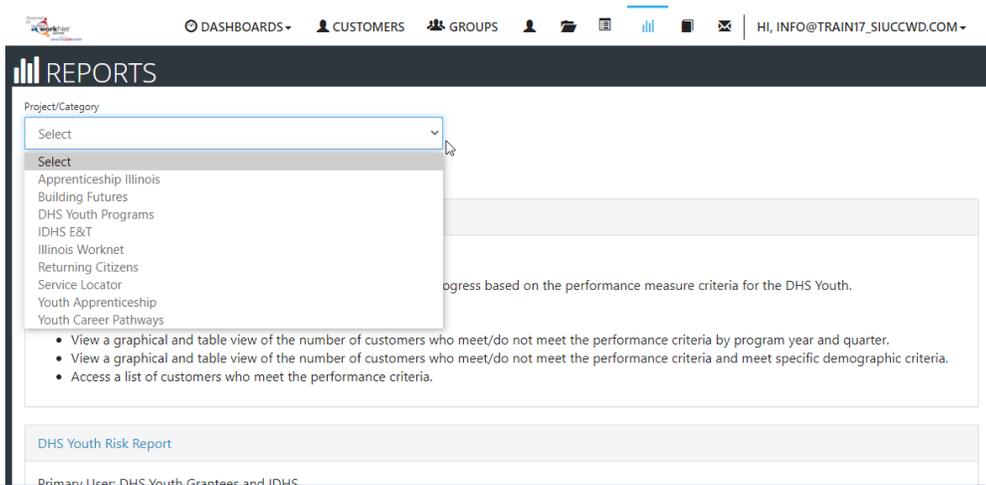


Using the Customer Services Report

This report allows users to see a list of services that have been assigned to customers in a group and update many participants at one time.

1. Log in to Illinois workNet.
2. Access the **Customer Support Center**.
3. Access the **Reports** tab.
4. Select the **Project/Category**.
5. Scroll to find and select **Customer Services Report**.



Customer Services Report

Primary User: Illinois workNet Partners

Purpose: The Customer Services Report provides a list of services provided to customers by project or Customer Support Center group. The list identifies the IWDS service if applicable, the status of the service, and the customer who have/do not have the listed service.

Run the Customer Services Report to:

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

After the report opens:

1. Select **Project**
2. Select **Grantee** if more than one available.
3. Other Filters are available if needed.
4. Report shows the number of participants associated and how they are associated to each step.
5. Click on a **number** to see the list of participants.

CUSTOMER SERVICES

Back to Reports

Project: DHS Youth Programs | Service Type: Select

Grantee: Austin Peoples Action Center | Start Date Begin Range: | Start Date End Range: |

Service Provider: Select | Customer Enrollment Status: All

[Filter](#) [Export](#)

Show 10 entries | Search:

Step/Service	IWDS Activity Name	IWDS Service Type	Not Started	Started	Successful Completion	Unsuccessful Completion	Evaluated/Not Required	Total Customers with Step/Service	Total Customers without Step/Service
CLS - Self Care	N/A	N/A	1	0	0	0	0	1	48
Anger management / conflict resolution	N/A		34	0	0	0	2	36	13
			0	2	0	0	0	2	47
			4	2	0	0	0	7	42

For the following example, the item in the top row that has 48 participants in the Total Customers without Step/Service for CLS-Self Care was selected.

6. When the list opens, the user can update all participants in that list at one time.
 - a. **Status** updates include: Planned/Not Started, Started/Open, Successful Completion, Unsuccessful Completion, and Evaluated/Not Required.

Evaluated/Not Required does not require dates or hours

- b. Enter **Start Date**
- c. Enter **Planned Due Date**
- d. Enter **Weekly Hours**
- e. Optional entry is **End Date**

Filter Save Export Import							
Last Name	First Name	Edit Step	Status *	Start Date *	End Date	Planned Due Date *	Weekly Hours *
Brown	Bryan	Add to Career Plan	Planned/Not Started (v				
Chapman	Kim	Add to Career Plan	Planned/Not Started (v				
Elliott	Rick	Add to Career Plan	Planned/Not Started (v				
Flat	Ken	Add to Career Plan	Planned/Not Started (v				
Galaxy	S9	Add to Career Plan	Planned/Not Started (v				
Galaxy	S8	Add to Career Plan	Planned/Not Started (v				
Grzanich	Jordan	Add to Career Plan	Planned/Not Started (v				

7. Click **Add to Career Plan** and the step is added to the participant Career Plan without any other information included.

All participants can be updated by changing the status, start date, planned due date and weekly hours. The status updates do not have to be the same status when doing so, although you can only update one status per service per person. After the service status is updated, the participant moves to a different column based upon the status entered. For example: if Rick Elliott is marked as Started/Open, the service will move to the Started column on the overall list of services page for that service.

If participants do not require a service, the service for that participant can be marked as Evaluated / Not Required. In many programs, that status will count toward a successful completion in the overall career plan.

This is an excellent tool to use if:

- new services need to be added to multiple participants simultaneously or
- if new requirements have been added to a program or
- an existing participant shifts into a new program and the existing career plan does not have the services required by the new program or
- an entire cohort of participants need an update for completion.

Best Practice

A best practice is to ensure that at least one participant has all the services added to the career plan. Then, go service by service selecting the column – Total Customers without Step/Service to update all other participants.