

## Purpose

Illinois workNet case note area is a communication tool used to document case notes and send Illinois workNet messages/emails to customers and partners. Case notes provide information related to intake, assessments, referrals, training, placement, employment/training plans, two-way communication, post-exit follow-up, and more. They can be filtered and exported using the tool.

## Who Enters/Maintains Data

- **Grantee/Provider staff** enters case notes into Illinois workNet. Staff can also use the tool to send messages to the customer, partners, and the Illinois workNet Team.
- **Customers** receive Case Notes sent as messages in their Illinois workNet account messages. They receive Case Notes sent as emails based on the email that is associated with their Illinois workNet account.

## Access Customer Case Note Page

1. Log into [www.illinoisworknet.com](http://www.illinoisworknet.com).
2. Select **My Dashboard**.
3. Select **Partner Tools**.
4. Select **Customer Support Center**.
5. Select **Groups** in the top menu.
6. Select **Youth Career Pathways PY21**.
7. Select the **customer's name** to access their information.
8. Select the **Case Notes** link in the Participant Summary Tools.

The Case Note page is a summary:

- May be entered on other pages.
- May be entered on the Case Note page.

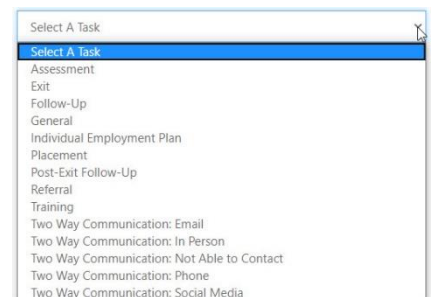
Additional resources:

[Telling the Story in Case Notes](#)

[Case Note Rubric.pdf](#)

## Add Case Note

1. Select **Add Case Notes** using the Case Note page or one of the other pages.
  - a. If you create the Case Note on the Progress page, it will display on the Progress page as well as the Case Note page.
  - b. If you create the case note on the Case Note page, it will only display on the Case Note page.
2. Select **a task**. Indicate what caused you to write the case note.
3. Enter the **contact date**.
4. Enter **subject** and **case note**.



5. Select **how to send** the Case Note:
  - a. As an Illinois workNet message. This will also save as a Case Note.
  - b. As an Illinois workNet message and email. This will go to the email associated with the Illinois workNet account. This will also save as a Case Note.
  - c. Save as a Case Note without sending a message/email.
6. If you choose to send it as a message/email, select **to whom** the message/email should be sent.

ADD CASE NOTE ✕

Two Way Communication: Phone ▾

Subject

Add your message

Send Case Note As:

As Illinois workNet Message  
 As Illinois workNet Message and Email  
 Save as case note without sending a message/email

Send Message/Email to:

Illinois workNet Team  
 Customer  
 train partner11  
 WPP Train16  
 train partner13

Add Case Note

Case Notes can be:

- Filtered by date range.
- Sorted at the top of any column.
- Exported into an excel file.

- CASE NOTES

Overview | Intake Review | Career Plan | Outcomes | **Case Notes**

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CASE NOTES

Profile: A [redacted]

Email a [redacted]@m

Enrollment Status Registrant

See All

Sync With IWDS ⓘ

Last Sync: 10/16/2020 9:11 AM

Reset Password Send Message

Related Instructions

[Telling the Story in Case Notes](#)

[Case Note Tool in Youth Career Pathways \(PDF\)](#)

Start Date  End Date

Add Case Note Filter Export

Show 50 entries Search:

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Source	Option
General	10/20/2020	Eligibility - Apprenticeship Illinois	A [redacted] completed enrollment and eligibility for Apprenticeship Illinois expansion grant.	N/A	Charles Jones	10/20/2020 2:13 PM	IwN	<a href="#">Send To IWDS</a>
General	10/20/2020	Eligibility - AE	A [redacted] completed enrollment and eligibility for Apprenticeship ...	N/A	Charles Jones	10/20/2020 2:15 PM	IwN	<a href="#">Send To IWDS</a>