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.
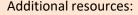
Access Customer Case Note Page

1. Log into www.illinoisworknet.com.
2. Select My Dashboard.
3. Select Customer Support Center/IWIS in the partner tools section.
4. Select Groups in the top menu.
5. Select JTED Project Group.
6. Select the customer's name to access their information.
7. Select the Case Notes link in the Participant Summary Tools.

The Case Note page is a summary of case noted entered on the:

- Other program pages.
- 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: Send Message/Email to:
○ As Illinois workNet Message   ☐ Illinois workNet Team
                                      ☐ Customer
○ As Illinois workNet Message and Email   ☐ train partner11
                                      ☐ WPP Train16
○ Save as case note without sending a   ☐ train partner13
  message/email

                                              Add Case Note

Case Notes can be:

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

⊘ DASHBOARDS ▾   👥 GROUPS   👤 🗀 🗐 ᐧ�h| HI, MSTEPHENSON ▾

👤 - CASE NOTES

| Overview | Intake | Training/Services | Program Completion/Follow-Up |

CASE NOTES

Profile: Marion Burt

First Name Marion

Last Name Burt

Email mburt@noemail123.com

See All

Reset Password

Participant Summary Tools

Assessments

Case Notes

Start Date

End Date

Add Case Note   Filter   Export

Show [50 ⌄] entries   Search: [   ]

Task	Contact Date ▼	Subject	Comment	Delivery Method	Entered By	Entered	Source	Options
Individual Employment Plan	6/2/2022	bhbjkjj	kjnbkjnjk	Save as case note without sending a message/email	Merryn Stephenson	6/2/2022 3:40 PM	IwN	

Showing 1 to 1 of 1 entries   Previous [1] Next