

## Purpose:

In Customer Groups, the agency has access to update and maintain Provider Information. The Grantee Details is a place to maintain current grant information, add agency case notes, file uploads, and add Training Program Information if applicable.

## Who Enters/Maintains Data

- **Grantee/Provider Staff** enters case notes.
- **State Level Staff** enters reviews and exports.

## Access Grantee Details

1. Log into [www.illinoisworknet.com](http://www.illinoisworknet.com).
2. Select **My Dashboard** then select **Customer Support Center**.
3. Select **Provider Info** then select **Grantee Details** tab.

The screenshot displays the 'PROVIDER INFO' section of the application. The 'Grantee Details' tab is selected and highlighted with a red box. Below the tabs, the 'Project' dropdown is set to 'CYEP' and the 'Provider' dropdown is set to 'African American Christian Foundation'. A 'Select' button is also highlighted with a red box. The 'Grantee Info' section is visible, showing fields for Grant Number, Start Date, End Date, Amount, and Contact Information. An 'ADD CASE NOTE' modal window is open, showing a 'Contact Date' of 4/6/2020, a 'Subject' field, and a text area for the message. The 'Send Case Note As:' section has 'As Illinois workNet Message and Email' selected. The 'Send Message/Email to:' section has a list of recipients, with 'Illinois workNet Team' selected. A red arrow points from the 'Add Case Note' button in the modal to the 'CASE NOTES(0)' dropdown in the main interface. Other buttons like 'Print', 'Add Case Note', 'Close', and 'Edit' are also visible.

4. If you are associated with multiple agencies/locations for the program, they will display as a list. Select the **Project**.
5. If you are associated with multiple agencies/locations for the program, they will display as a list. Select the **Provider**.
6. Click the **Select** Button.
7. On the next screen that opens, click the drop-down arrow next to **Case Notes**.
8. Click the **Add Case Note** Button. A new modal window will pop open.
9. Enter the Subject Keyword using one of the following Categories:
  - COVID19 and
  - Agency update
  - Worksite update
10. Type in your message.
11. Select Send Case Note As: **An Illinois workNet Message and Email**.
12. Select the recipients. Include all appropriate Illinois Department of Human Services Representatives.
13. Click the button **Add Case Note**.

**NOTE:**

- Individual customer case notes must be added to the customer profile. DO NOT add them under the agency case notes.
- If you make a mistake in the case note, you cannot edit or delete the note. Add another case note with the correct information.
- In addition to the keyword in the subject, make the case note a name that anyone would be able to understand.