

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 (who do not have access to IWDS)** enters case notes into Illinois workNet. Staff can also use the tool to send messages to the offenders (not in custody), partners, and the Illinois workNet Team. The Case Notes populate to IWDS.
- **Title 1B staff (who have access to IWDS)** enters case notes into IWDS or Illinois worknet. Case Notes entered in IWDS will populate to Illinois workNet. Case Notes entered in Illinois workNet will populate to IWDS. Staff can also use the Case Note tool to send messages to offenders (not in custody), partners, and the Illinois workNet Team.
- **Customers/Offenders Not In Custody** 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 **Partner Tools**.
4. Select **Customer Support Center**.
5. Select **Groups** in the top menu.
6. Select **Returning Citizens**.
7. Select the **customer's name** to access their information.
8. Select the **Case Notes** tab.

Shortcut Tip:

Go to Returning Citizen Partner Guide.

Select the link for **Returning Citizens Partner Tools**.

The Case Note page is a summary:

- Entered on other pages.
- Entered into IWDS.
- Entered on the Case Note page.

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 Checklist or Career Plan pages, it will display on the Checklist or Career Plan pages 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 (and in IWDS).
2. Select a task (i.e., Assessment, Follow-up, General, Placement, Two Way Communication).
3. Enter the contact date.
4. Enter subject and enter 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 who the message/email should be sent to.

ADD CASE NOTE

Contact Date *

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

Case Notes can be:

- Filtered by date range.
- Sorted by task, comment, entered by, and date entered.
- Exported into an excel file.

Application	Suitability	Progress	Services/Outcomes	Case Notes	Assessments	Optimal Resume	Worksite Placement																
<h2 style="margin: 0;">CASE NOTES</h2> <div style="background-color: #fff9c4; padding: 5px; margin-bottom: 10px;"> VIEW INSTRUCTIONS: Case Note Tool </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 25%;"> <p>Profile</p> <p>First Name Walter</p> <p>Last Name Apprenticeship</p> <p>Email me1@you.com Show More Contact Information</p> <p>User Name WalterA</p> <p>Last 4 SSN 0201</p> <p>workNet ID 20237</p> <p>Program Name N/A Show More Program Information</p> </div> <div style="width: 50%;"> <p>Start Date <input type="text"/></p> <p>End Date <input type="text"/></p> <p style="text-align: center;"> <input type="button" value="Add Case Note"/> <input type="button" value="Filter"/> <input type="button" value="Export"/> </p> <p>Show <input type="text" value="50"/> entries Search: <input type="text"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Task</th> <th>Contact Date</th> <th>Subject</th> <th>Comment</th> <th>Delivery Method</th> <th>Entered By</th> <th>Entered</th> <th>Options</th> </tr> </thead> <tbody> <tr> <td>General</td> <td>9/13/2017</td> <td>Your Application has Been Submitted</td> <td>Your application has been submitted. DO NOT REPLY TO THIS</td> <td>N/A</td> <td>System</td> <td>9/13/2017 5:00 PM</td> <td></td> </tr> </tbody> </table> </div> </div>								Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options	General	9/13/2017	Your Application has Been Submitted	Your application has been submitted. DO NOT REPLY TO THIS	N/A	System	9/13/2017 5:00 PM	
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