

Contents

Purpose	1
Who Enters/Maintains Data	1
Access Customer Case Note Page	1
Case Note Page	2
Add Case Note.....	3
Deleting a case note.....	4
Super Admin Managing Case Note Deletion Requests	6

Purpose

The 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 **Partner Tools**.
4. Select **Customer Support Center/IWIS**.
5. Select **Groups** in the top menu (this should be the partner landing page when entering IWIS).
6. Select **the appropriate project group**. i.e. ISETS, DHS Youth, JTED
7. Select the **customer's name** to access their information.
8. Select the **Case Notes** from the left menu or a tab.

Additional resources:

[Telling the Story in Case Notes](#)

[Case Note Rubric.pdf](#)

The Case Note page summarizes all case notes entered on the participant profile and may be entered in the Career Plan or the Case Note page.

Case Note Page

Case Notes can be:

- Filtered by date range.
- Sorted at the top of any column.
- Exported into an excel file.
- Filtered by source Illinois workNet (IwN) or IWDS
- Send a case note to IWDS by clicking the option in the far-right column. *The option will not show if the case note has already been sent to IWDS. This does not complete a Sync – only sends the case note.*

CASE NOTES

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[See All](#)

[Reset Password](#) [Send Message](#)

Related Instructions

[Telling the Story in Case Notes](#)

[Case Note Tool \(PDF\)](#)

[Case Note Writing Rubric](#)

Participant Summary Tools

[Assessments](#)

[Case Notes](#)

[Resumes](#)

[Services](#)

Most Recent Case Note Created Date: 11/07/2023 (2 day(s) ago)

Start Date End Date

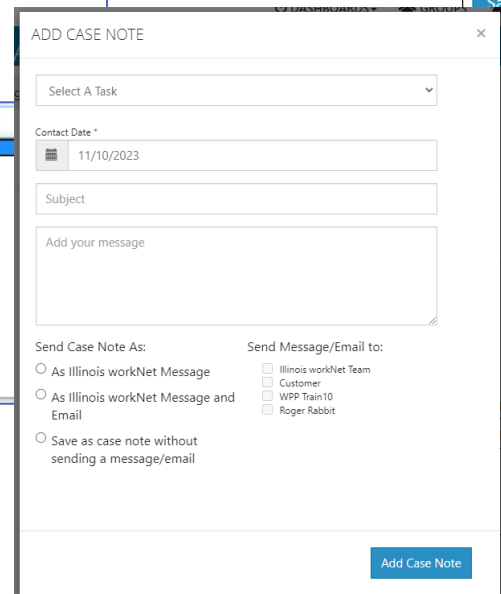
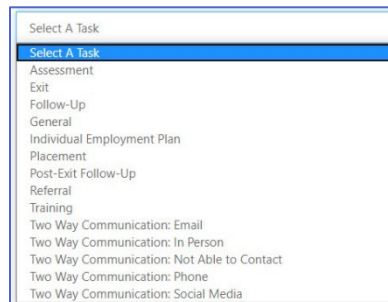
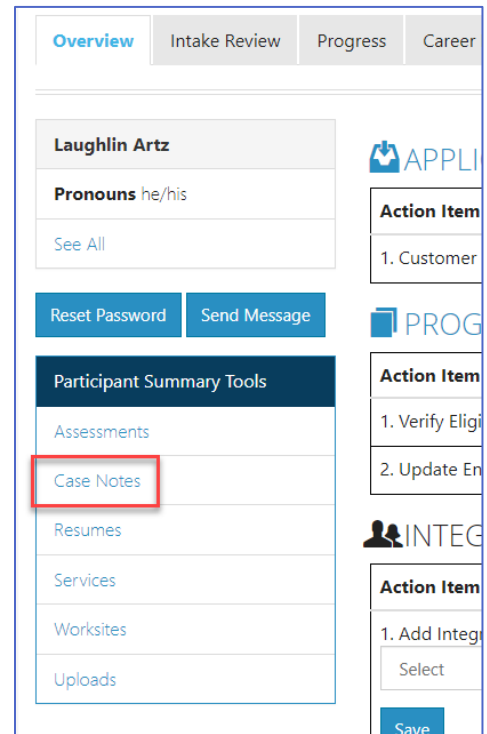
[Add Case Note](#) [Filter](#) [Export](#)

Show entries Search:

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Deleted	Delete Requested on 11/07/2023 4:39 PM	N/A	Delete Reason: Duplicate case note	N/A	Delete Requested By: TPrograms	Deleted on: 11/07/2023 4:39 PM	
General	11/07/2023 12:00 AM	Testing case note deletion - reject this one	testing case note deletion - reject this one	Save as case note without sending a message/email	Three Programs	11/07/2023 4:42 PM	Delete
General	11/07/2023 12:00 AM	Looking for Unsubmit	Looking for Unsubmit	Save as case note without sending a message/email	Three Programs	11/07/2023 5:11 PM	Unsubmit Requested Delete: Three Programs

Add Case Note

1. Select **Add Case Notes**
 - a. If you create the case note on the Case Note page, it will only display on the Case Note page (and for certain programs may sync with IWDS).
2. Select **a task**. Indicate the case note is being written.
3. Enter the subject and the content for the case note.
4. Select **how to send** the Case Note:
 - a. As an Illinois workNet message. This will also be saved as a Case Note.
 - b. As an Illinois workNet message and email. This will go to the email associated with the Illinois workNet account of the person selected from the list and be saved as a Case Note.
 - c. Save as a Case Note without sending a message/email.
5. If you choose to send it as a message/email, select **to whom** the message/email should be sent.



Deleting a case note

Partners can request to delete a case note from a customer’s profile.

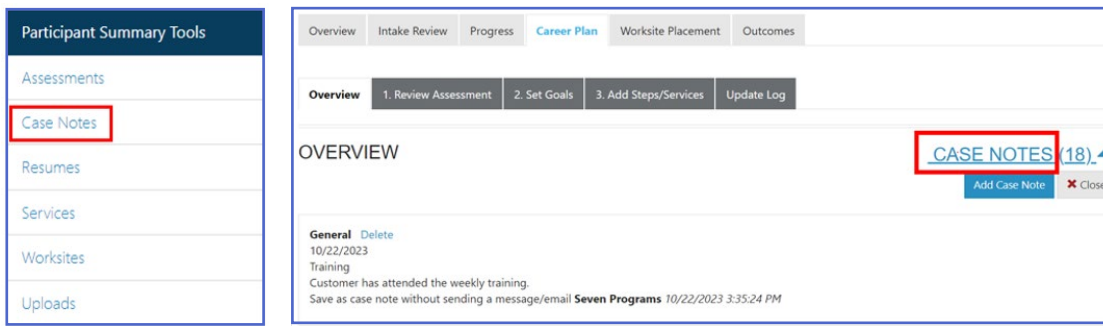
A case note can be requested to be deleted if one or more of the following has occurred:

- The case note was added to the wrong customer.
- The case note is a duplicate.
- The case note information is incorrect.
- The case note includes Personal Identifiable Information (PII).

After the request has been submitted the Grant Manager will review the request.

A case note can be requested to be deleted from the left menu on most profile pages:

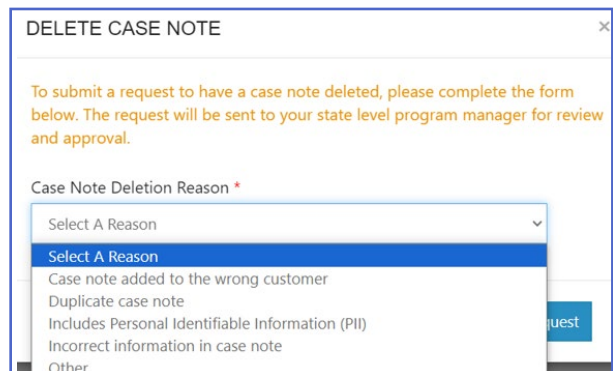
- Participant Summary Tools > Case Notes; or,
- Career Plan > any tab.



1. Click the **Delete** button next to the case note that should be removed.

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Training	11/3/2023	Employment Training	Customer attended the full training session on 11/3/23.	Save as case note without sending a message/email	Seven Programs	11/3/2023 12:38 PM	Delete

2. After clicking Delete, a **drop-down list** is provided with reasons for why the case note should be removed.



3. Select a **reason** that applies and then click **Submit Request**.

DELETE CASE NOTE ×

To submit a request to have a case note deleted, please complete the form below. The request will be sent to your state level program manager for review and approval.

Case Note Deletion Reason *

Incorrect information in case note

Submit Request

4. The case note will now show *Unsubmit* as the status.

5. If the case note was deleted in error or does not need to be deleted, click the **Unsubmit** button.

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Training	11/3/2023	Customer Attended 11/3 Training	Customer attended the full training session on 11/3/23.	Save as case note without sending a message/email	Seven Programs	11/3/2023 12:38 PM	Unsubmit Requested Delete: Seven Programs on 11/03/2023

After a request has been completed by a Program Manager, the status will show on the case note.

6. A case note that has been Approved will show a status of Deleted and the date.

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered
Deleted	Delete Requested on 11/07/2023 4:39 PM	N/A	Delete Reason: Duplicate case note	N/A	Delete Requested By: TPrograms	Deleted on: 11/07/2023 4:39 PM


7. A case note request that has been rejected, will go back to the original state and an email will be sent to the requester.

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Training	11/3/2023	Employment Training	Customer attended the full training session on 11/3/23.	Save as case note without sending a message/email	Seven Programs	11/3/2023 12:38 PM	Delete

The email will provide details of why the request was rejected.

Reach out to the Grant Manager with any questions.

Rejected Case Note Deletion Request

 Illinois workNet <donotreply@illinoisworknet.com>
To: Al Bundy

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Your request to delete case note for Customer with workNet ID 6121 has been rejected.

Request rejected notes were add by: Seven Programs

Rejection Reason notes: More information is needed.

Please follow up with your Program Manager regarding any questions.

Sincerely,

Illinois workNet Team

info@illinoisworknet.com
Office Hours: 8:00 a.m. - 4:30 p.m. (Monday - Friday except holidays and administrative closures.)

Super Admin Managing Case Note Deletion Requests

Only Super Admin for the project can manage case note deletion requests.

1. Click **Reports**.
2. Select **Case Note Deletion Request Report**
3. Select **Project**
4. Select **Status - Not Reviewed**
5. Select **Filter**
6. Select **Manage**
 - a. If you want to review the entire case file, select the customer's last name.
 - b. The case note message, agency, and who requested the deletion are all visible in the modal that opens.
7. Select a reason - **Approved or Rejected**
8. If rejected is selected, write a message that is emailed to the partner telling them why it was rejected.
9. Click **Save**.

Status will then indicate Approved or rejected on the customer list.

apps.illinoisworknet.com/SiteAdministration/Reports/Reports/CaseNoteDeletionRequestReport

EMAILS CUSTOMERS MARKETING JOB SEARCH CONSTRUCTION TRANSLATE FREE STOCK STORYBLOCKS PRESS THIS SOCIAL MEDIA MARKETING PAIR.COM PICMARK

DASHBOARDS CUSTOMERS GROUPS HI, DREINHARDT

CASE NOTE DELETION REQUEST REPORT

Back to Reports

Project *
Apprenticeship Illinois

Agency
Select

Status
Not Reviewed

Filter Export

10 entries

Note Id	Last Name	First Name	Task	Subject	Entered By	Entered	Deletion Reason	Requested By	Agency	Status	
423482	K...	Y...	General	General	Ariel Bettis	11/02/2023 3:16 PM	Duplicate case note	A...	Hope Center Foundation	Not Reviewed	Manage
423482	K...	Y...	General	General	Ariel Bettis	11/02/2023 3:16 PM	Duplicate case note	A...	Hope Center Foundation	Not Reviewed	Manage

Related Instructions
[Case Note Deletion Instructions](#)

MANAGE CASE NOTE DELETION REQUEST

Status: Rejected

Reject Reason: Provide reason for rejection

CustomerName: ...
ProjectName: Apprenticeship Illinois
AgencyName: Hope Center Foundation

DELETION REQUEST INFORMATION

UserNameRequestedDelete: ...
DeleteRequestedDate: 11/02/2023
DeletionReason: Duplicate case note

Note Id	Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered
423482	General	11/02/2023	General	Client has been consistently showing up to class. Client missed today due to a family emergency.	Save as case note without sending a message/email	Ariel Bettis	11/02/2023 3:16 PM

Save Close

awson Antanise General Your System 10/18/2023 Duplicate Ariel Bettis Hope Not