Customer Groups /Teams

Giving Partners Access to Customers

5/2017 Final

Purpose: Customer Groups and Teams allow the system to control staff access to customer information.

Access Levels:

1. Super User – Statewide Staff (Ex: DCEO Staff) see statewide information and use a dropdown menu to see specific regional information.
2. Career Planner/Case Worker – Career Planners (Ex. LWDA Staff) have access to customer information for their region(s).
3. Partner – Partners have limited access to a subset of customers. They are provided access to customers through teams. Partners can be on 1 or more teams. Examples:
   - K-12 partner (ex: District 99)
   - Postsecondary partner (ex: College of DuPage)
   - Support service provider
   - Employer

Information Available For Each Access Level:

Super User	**Career Planner/Case Worker**	**Partner**
View **statewide** information that includes: • All dashboard views for statewide and region levels that link to reports/customer information. • Reporting ability for statewide and region levels. • Access to all customer information collected for the program.	View **regional** information that includes: • All dashboard views for their region(s) that link to reports/customer information. • Reporting ability for their region(s). • Access to all customer information collected for the program for their region(s).	View **team level** information that includes: • All dashboard views for their region but do not have access to reports/customer information. • Access to most customer information collected for the program for customers that are added to their team(s). They do not see customer contact information or private information from IWDS.

How to Provide Access to Customer Support Center Groups/Program Information:

1. Partners must have their location set up in Illinois workNet Services Finder.
2. Partners must have an Illinois workNet account.
3. Provide a list of Illinois workNet Partners and the access level to info@illinoisworknet.com to give them access to the DEI Customer Groups. Include the following information:
   a. First & Last Name
   b. Email
   c. Level of access **career planner/case worker** or **partner**.

d. Partner Type: K-12, Post-Secondary, Support Service, etc.

Provide Partners Access to Customer/Program Information Through Teams:

Career planners/case workers can set up teams and add other career planners/case workers, partners and customers to the teams. This is the only way a person with partner level access can access customer program information.

Your region can have an unlimited number of teams, but here are some things to consider before you set up teams:

- There is a minimum of one partner on a team.
- Partners can be on multiple teams.
- Customers can be on multiple teams.
- Partners and customers can be added and removed from teams.
- Common format for team names.

Steps for creating a team:

1. Log into DEI Partner Program Tools using an account with career planner/case worker level access.
2. Select teams and add a team.
3. Enter the team name and team description. Save.
4. Select Team Details.
    a. Updated group name/description as needed.
    b. Add partners
    c. Add customers