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HI. INFO@TRAIN10_SIUCCWD.COM

Purpose

Customer Services Report provides a list of services provided to customers by project or a Customer Support Center group. The list identifies the Illinois Workforce Development System (IWDS) service if applicable, the status of the service, and the customer who have/do not have the listed service. The report provides the ability to update services for multiple customers at one time.

Who Enters/Maintains Data

Grantee/Provider staff run the Customer Services Report to:

1. View/Export the complete or filtered list of services associated with customers that includes the status of each service.

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Partners Capacity Building Activities

Select a Provider First

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2. Update services at a group level by accessing a filtered list of customers who have a specific service.

Access Customer Services Report in Two Places

- Option 1
- 1. Log into www.illinoisworknet.com.
- 2. Select My Dashboard.
- 3. Select Partner Tools.
- 4. Select Customer Support Center.
- 5. Select Apprenticeship Illinois from the groups listing.
- 6. Select Services Report Button.

Option 2

- 1. Log into www.illinoisworknet.com.
- 2. Select My Dashboard.
- 3. Select Partner Tools.
- 4. Select Customer Support Center.
- 5. Select Reports icon in the top menu.
- 6. Select Customer Services Report.

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Customer Services Report

How to use the Customer Services Report

- 1. Select a project. (Note: If you are using the report to view a customer status for your personal group, select Illinois workNet.)
- 2. Use the other filters to narrow down search results.
- 3. Use the Export button to export the list of services with the number of customers in each status column.
- 4. Use the search to filter services by key word.
- Select the number links in the table to get a filtered list of customers. The table includes sortable columns for the service and status.
 - a. Step/Service is the name of the step in Illinois workNet. If this is N/A, the service came from IWDS and has not been sync with an Illinois workNet service.
 - b. IWDS Activity Name is the crosswalked IWDS activity for the Illinois

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roject *					Service Type			
Apprenticeship I	llinois			~	Select			~
irantee					Start Date Be	gin Range		
Apprenticeship I	llinois - ABC Locati	on		~				
ervice Provider					Start Date En	d Range		
Select				~				
ustomer Enrollment St	atus							
All				~				
Filter Export								
how 10 🕶 entries								Search:
* Step/Service	IWDS Activity	IWDS Service Type	Not Started	Started	Successful OCompletion	Unsuccessful Completion	Total Customers with Step/Service	Total Customers without Step/Service
Complete a training program where you earn an industry	Occupational Skills Training	Academic Learning Service	1	2	1	2	6	63
recognized credential.								

- workNet step. If this is N/A, the Illinois workNet service has not been crosswalked to an IWDS activity.
- c. IWDS Service Type is the crosswalked IWDS activity for the Illinois workNet step. If this is N/A, the Illinois workNet service has not been crosswalked to an IWDS service type.
- d. Not started is the service status for customers who have the service in their career plan, but it does not have a started/open status.
- e. Started is the service status for customers who have the service in their career plan with a started/open status. This can also include IWDS services that populated into Illinois workNet automatically and may or may not be in the career plan.
- f. Successful Completion is the service status for customers who have the service in their career plan with a successful completion status. This can also include IWDS services that populated into Illinois workNet automatically and may or may not be in the career plan.
- g. Unsuccessful Completion is the service status for customers who have the service in their career plan with an unsuccessful completion status. This can also include IWDS services that populated into Illinois workNet automatically and may or may not be in the career plan.



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Update Customer Services Using the Services Report

There are two ways to update services:

- Use the online form This is a great option for partners who will log into the tools to update information.
- Use the Export/Import This is a great option for partners who provide services but may not commit to logging into the tools to provide service updates.

Both ways can update customers who:

- Have services in their Career Plan.
- Do not have services in their Career Plan.

It is important to understand the basic purpose and requirements for the Illinois workNet Career Plan. The Career Plan is a tool that case workers and/or career navigators can use with their customers to:

- Review assessment results.
- Create goals based on assessment results.
- Identify steps/services needed to achieve those goals.
- Document status and flags when intervention is needed.

Customers can access their career plan information in My Dashboard. They can update the self-service steps in their workNet Career Plan.

Since the Career Plan is used as a communication tool with the customer, there are certain fields that are required because it is a plan.

- Goals are identified.
- All steps are associated with a goal.
- All steps have a planned start date, planned due date, planned weekly hours. This is for planning purposes.
- Once started, the actual start date is recorded.
- Once complete, the actual end is recorded.
- Other optional fields are available to communicate/document more details.

Update Customers Who Have Steps Using Online Form

- 1. Once a number link is selected in the table, a filtered list of customers is available with step/service fields that can be updated.
- Services that have the info bubble and grayed out fields come from IWDS. That means

Project *					Step/Service Name					
Apprenticeship Illinois					Complete a training program where you earn an industry recognized					
Grantee						IWDS Activity Name				
Apprenticeship Illinois - ABC Location					Occupational Skills Training					
Service Prov	ider				Service Sta	tus				
Select				~	Total \	Without Service		~		
Service Type					Start Date	Begin Range				
Select				~						
Customer Er	rollment Status				Start Date	End Range				
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All				~						
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Filter		Edit Step	Status *		t Date *	End Date	Planned Du *			
Filter Last	First		Status * Planned/Not Started (*	Start	t Date *	End Date				
Filter Last Name	First Name	Edit Step Add to		Start	t Date *	End Date		e Date Weekly Hours *		
Filter Last Name Butler	First Name Matt	Edit Step Add to Career Plan Add to	Planned/Not Started (Start	t Date *	End Date				





the status, dates and hours need to be updated in IWDS. Other data associated with the service can be updated by selecting the link to the service. For example, the goal, special instructions, situations, credentials, etc. can be updated in order to update the customer's career plan.

- Services that are not grayed out can be updated in Illinois workNet. There are several different statuses:
 - Planned/Not Started services require a start date, planned due date, and weekly hours.
 - If you are working with a program that used a pre-populated career plan, these fields may be empty. Those fields are required when the service is updated.

			Ste	p/Service Name				
reer Pathways			*	Attend adult educa	tion and literacy cla	asses.		
			IWI	DS Activity Name				
			*	Select				
er			Ser	vice Status				
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			0.	rt Date Begin Range				
			¥					
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Save Export	Import							
First Name	Edit Step	Status *		Start Date *	End Date	Due Da	ate *	Weekly Hours
Mater	Attend adult educa literacy classes.	these fields must be upd	ynced with IWDS tated in the IWDS	and 1/5/2018	8/13/2019	7/10/	2019	10.00
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- ii. If the service is added to a career plan, select the service link and it will open the service screen in a new window for easy access to update the full details for the customer. The service will need to be associated with a goal.
- b. Started/Open services a start date, planned due date, and weekly hours. This service can be updated in Illinois workNet if it is not required for it to be documented in IWDS. If the service is required to be in IWDS, make sure IWDS uses the same start date, IWDS activity, IWDS service type. Then, the IWDS service will sync with the planned service that is already in the customer's career plan. Once synced Illinois workNet will automatically update when IWDS is updated.

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c. Successful and Unsuccessful Completion a start date, end date, and weekly hours. This service can be updated in Illinois workNet if it is not required for it to be documented in IWDS. If the service is required to be in IWDS, make sure IWDS uses the same start date, IWDS activity, IWDS service type. Then, the IWDS service will sync with the planned service that is already in the customer's career plan. Once synced Illinois workNet will automatically update when IWDS is updated.

Update Customers Who Have Steps Using Export/Import

- 1. Once a number link is selected in the table, a filtered list of customers is available with step/service fields that can be updated.
- 2. Select the Export button to export an Excel file with the following columns that can be

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updated. NOTE: There will be one service per export, but there can be multiple statuses included in an export.

- a. Customer Service ID = Do not change.
- b. Last Name = Do not change.
- c. First Name = Do not change.
- d. Step Name = Do not change.
- e. Sync with IWDS = Do not Change
- f. Service Status = Update as needed with the following status. (Format use the exact text)
 - i. Planned/Not Started
 - ii. Started/Open
 - iii. Successful Completion
 - iv. Unsuccessful Completion
- g. Start Date = Update this field with the planned or actual start date. (Format mm/dd/yyyy)
- h. End Date = Update this field if the service status is either successful completion or unsuccessful completion. (Format mm/dd/yyyy)
- Due Date = Update this field with the planned due date. It is required but only for planning purposes and communicating the goal end date for the customer. This is required for each status. It does not have to match the end date. (Format – mm/dd/yyyy)
- j. Weekly Hours = Update this field to identify the planned number of hours the customer is expected to spend on this service in a week. This information is required for updating the service. (Format Number only)
- 3. Send the spreadsheets to your partner who is providing the service and ask them to update the service status, start date, end date, due date and weekly hours. Provide the Partner Instructions below so they know how to update the spreadsheets.
- 4. Once the provider returns the spreadsheet, check to make sure it is formatted correctly. If there is incomplete required information for a customer, remove that line before uploading into the system.
- 5. Go back to your filtered list of customers and select Import.
- 6. Upload the file and refresh the page to see the updates.
- 7. Select the service link to update additional details for the customer's specific service.

Partner Instructions: Updating Service Export Files

Dear (partner name),

We are in the process of updating our customers' career plans to reflect services they have received from our partners. You have the option of:

- 1. Logging into the partner tools and updating the information directly into the system; or
- 2. Update the attached spreadsheet and we will upload the information into the system.

If you are using the spreadsheet option, you will find there is one spreadsheet for each of the following services:

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Project* Youth Career Pathways		Step/Service Name Attend adult education and literacy classes.	
Total Career Factiways		Attend addit education and interacy classes.	
Grantee		IWDS Activity Name	
Select	Ŧ	Select	٣
Service Provider		Service Status	
Select	Ŧ	Total With Service	٣
Service Type		Start Date Begin Range	
Select	٣		
	1	Start Date End Range	
Filter Save Export Import			





- List service 1
- List service 2
- List service 3, etc.

For each of these spreadsheets, please update the following columns using the specified format.

- Service Status = Update as needed with the following status. (Format use the exact text)
 - Planned/Not Started
 - Started/Open
 - Successful Completion
 - Unsuccessful Completion
- Start Date = Update this fields with the planned or actual start date. (Format mm/dd/yyyy)
- End Date = Update this field when the service status is either successful completion or unsuccessful completion. (Format mm/dd/yyyy)
- Due Date = Update this field with the planned due date. It is required but only for planning purposes and communicating the goal end date for the customer. This is required for each status. It does not have to match the end date. (Format mm/dd/yyyy)
- Weekly Hours = Update this field to identify the planned number of hours the customer is expected to spend on this service in a week. This information is required for updating the service. (Format -Number only)

If you have provided other services that you would like to have documented into their career plan, please let us know and we will make sure they are included.

We would like to have the information updated by MM/DD/YYYY. Please let us know if enough time to complete this task.

Sincerely,

The Illinois workNet Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711. This workforce product was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. For more information please refer to the footer at the bottom of any webpage at illinoisworknet.com.