

## Purpose

The case note feature is a communication tool used to document case notes and send Illinois workNet messages/emails to participants and partners. They can be filtered and exported using the tool.

## Who Enters/Maintains Data

- **Grantee staff** enters case notes into Illinois workNet. Staff can also use the tool to send messages to the participants, partners, and the Illinois workNet Team.
- **Participants** 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 Participant Case Note Page

1. Log into [www.illinoisworknet.com](http://www.illinoisworknet.com).
2. Select **My Dashboard** and go to the Partner tools section.
3. Select **Customer Support Center/IWIS**.
4. Select **Groups** in the top menu.
5. Select **Illinois Works**.
6. Select the **participant's name** to access their information.
7. Select the **Case Notes** link in the Participant Summary Tools.

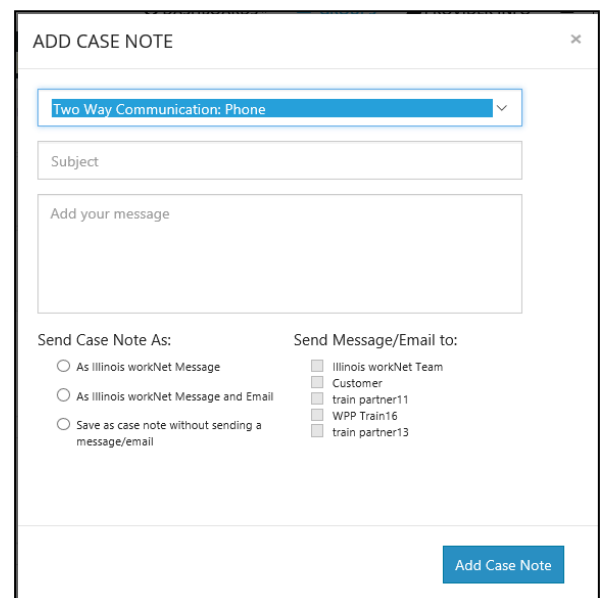
Additional resources:

[Telling the Story in CaseNotes](#)

[Case Note Rubric.pdf](#)

## Add Case Note

1. Select **Add Case Notes** using the Case Note page or in the course of adding participant information throughout the system.
2. Select **a task**. Indicate what caused you to write the case note.
3. Enter the **contact date**.
4. Enter **subject** and **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 **to whom** the message/email should be sent.



**ADD CASE NOTE**

Two Way Communication: Phone

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

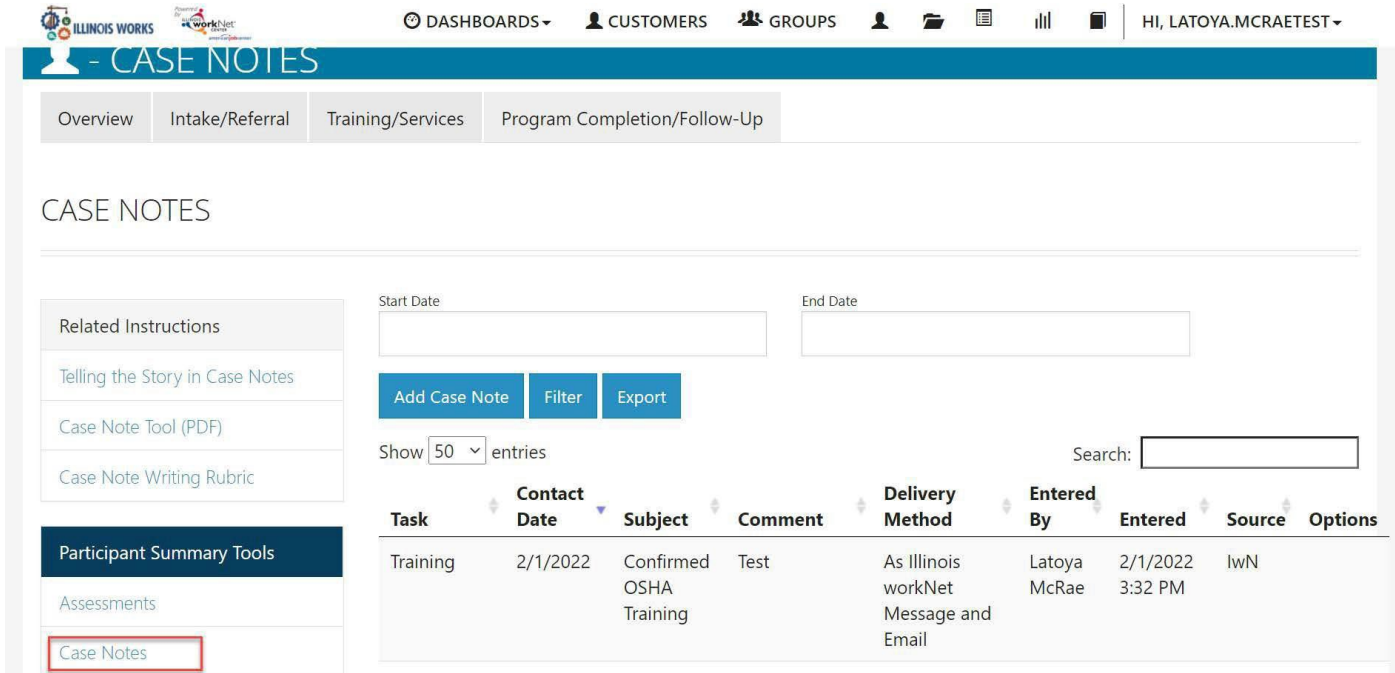
Send Message/Email to:

- Illinois workNet Team
- Customer
- train partner11
- WPP Train16
- train partner13

Add Case Note

Case Notes can be:

- Filtered by date range.
- Sorted at the top of any column.
- Exported into an excel file.



The screenshot shows the 'CASE NOTES' interface. At the top, there is a navigation bar with 'ILLINOIS WORKS' and 'workNet CENTRAL ameriGanJobcenter' logos, and a user profile 'HI, LATOYA.MCRAETEST'. Below the navigation bar, there are tabs for 'Overview', 'Intake/Referral', 'Training/Services', and 'Program Completion/Follow-Up'. The main content area is titled 'CASE NOTES' and contains a search filter with 'Start Date' and 'End Date' input fields, and buttons for 'Add Case Note', 'Filter', and 'Export'. Below the filter, there is a 'Show 50 entries' dropdown and a search input field. A table displays the case notes data:

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Source	Options
Training	2/1/2022	Confirmed OSHA Training	Test	As Illinois workNet Message and Email	Latoya McRae	2/1/2022 3:32 PM	lwN	

On the left side, there are sections for 'Related Instructions' (including 'Telling the Story in Case Notes', 'Case Note Tool (PDF)', and 'Case Note Writing Rubric') and 'Participant Summary Tools' (including 'Assessments' and 'Case Notes', which is highlighted with a red box).

## Adding a Case Note from Participant’s Overview Page

On the participant’s overview page you can select **Case Notes** to open a dropdown view of past case notes for the customer. Select the **Add Case Note** button to complete a case note.

ILLINOIS WORKS REPORTING SYSTEM OVERVIEW

Overview
Intake
Training/Services
Program Completion/Follow-Up

CASE NOTES(6) ▲

Profile: Adeel Blake	<a href="#">Refresh Status</a> Last updated: 05/17/2022 10:03
Email: ablake@noemail123.com	<a href="#">View/Edit</a> <b>Follow-Up Date:</b> 07/25/2022 <span style="float: right; background-color: green; color: white; padding: 2px 5px;">Good</span>
DOB: 2/20/2000	<a href="#">View/Edit</a> <b>Enrollment Status:</b> <span style="color: blue;">i</span> <span style="float: right; background-color: green; color: white; padding: 2px 5px;">Good</span>
Last 4 SSN	Enrolled
<a href="#">See All</a>	

ADD CASE NOTE
✕

Select A Task
▼

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

Add Case Note

CASE NOTES(6) ▼

Add Case Note
✕ Close

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.

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