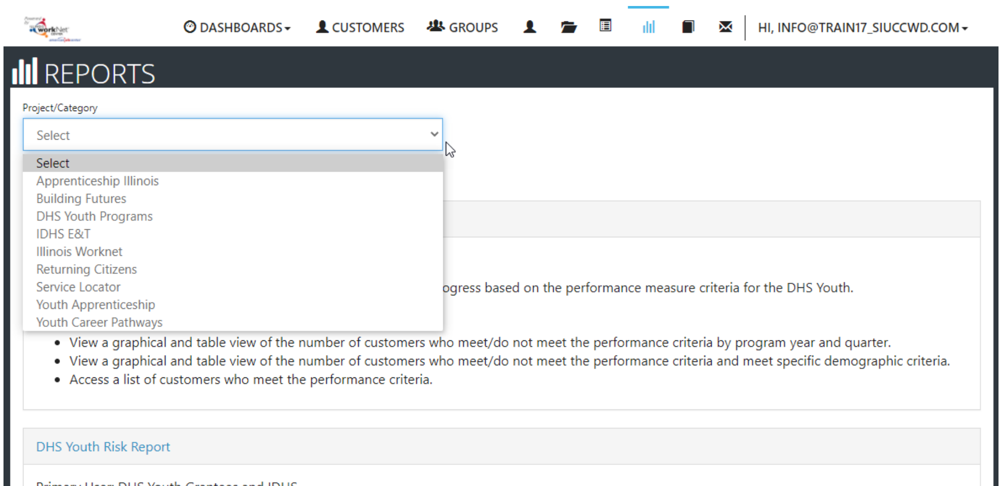
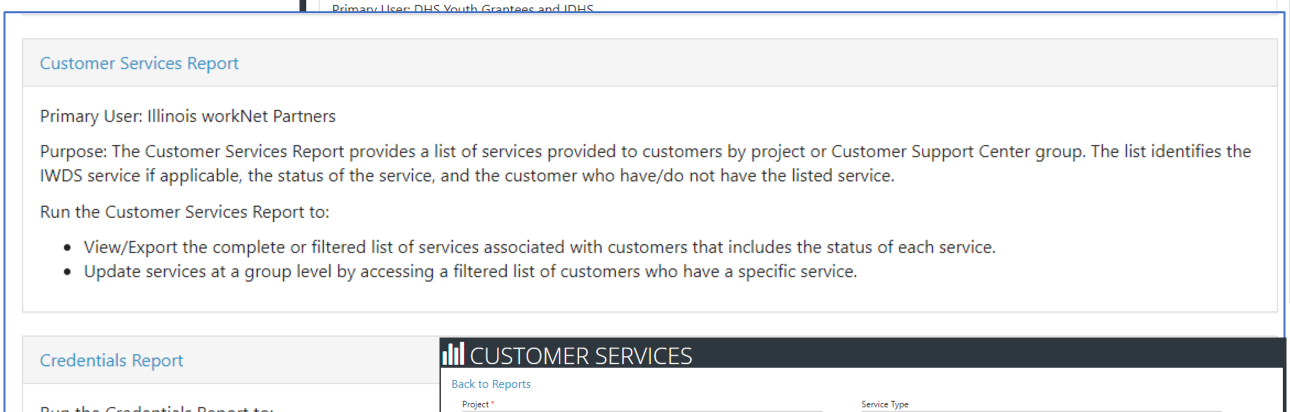
Using the Customer Services Report

This report allows users to see a list of services that have been assigned to customers in a group and update many participants at one time.

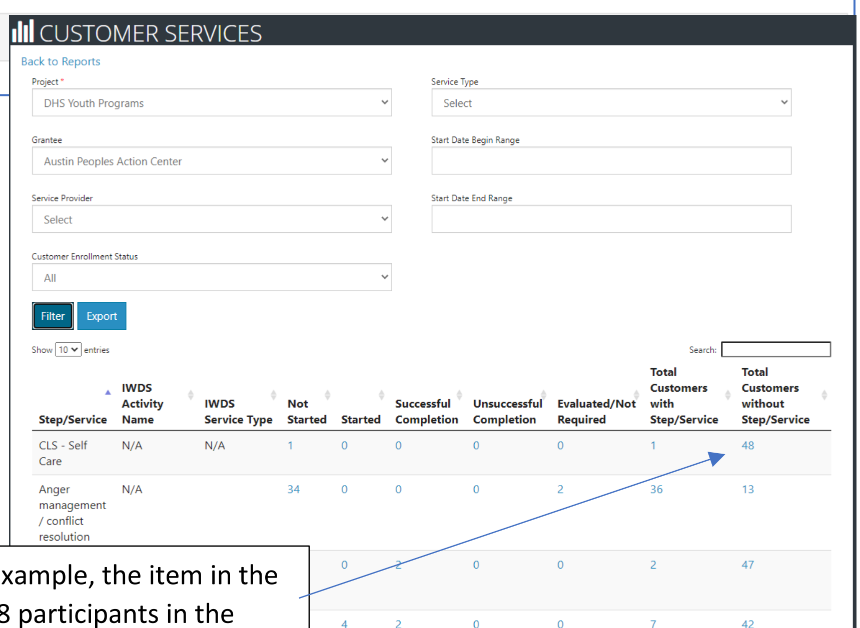
1. Log in to Illinois workNet.
2. Access the Customer Support Center.
3. Access the Reports tab.
4. Select the Project/Category.
5. Scroll to find and select Customer Services Report.





After the report opens:

1. Select Project
2. Select Grantee if more than one available.
3. Other Filters are available if needed.
4. Report shows the number of participants associated and how they are associated to each step.
5. Click on a number to see the list of participants.



For the following example, the item in the top row that has 48 participants in the Total Customers without Step/Service for CLS-Self Care was selected.

6. When the list opens, the user can update all participants in that list at one time.
    a. Status updates include: Planned/Not Started, Started/Open, Successful Completion, Unsuccessful Completion, and Evaluated/Not Required. *Evaluated/Not Required does not require dates or hours*
    b. Enter Start Date
    c. Enter Planned Due Date
    d. Enter Weekly Hours
    e. Optional entry is End Date

Filter Save Export Import

Last Name	First Name	Edit Step	Status *	Start Date *	End Date	Planned Due Date *	Weekly Hours *
Brown	Bryan	Add to Career Plan	Planned/Not Started (				
Chapman	Kim	Add to Career Plan	Planned/Not Started (				
Elliott	Rick	Add to Career Plan	Planned/Not Started (				
Flat	Ken	Add to Career Plan	Planned/Not Started (				
Galaxy	S9	Add to Career Plan	Planned/Not Started (				
Galaxy	S8	Add to Career Plan	Planned/Not Started (				
Grzanich	Jordan	Add to Career Plan	Planned/Not Started (				

7. Click Add to Career Plan and the step is added to the participant Career Plan without any other information included.

All participants can be updated by changing the status, start date, planned due date and weekly hours. The status updates do not have to be the same status when doing so, although you can only update one status per service per person. After the service status is updated, the participant moves to a different column based upon the status entered. For example: if Rick Elliott is marked as Started/Open, the service will move to the Started column on the overall list of services page for that service.

If participants do not require a service, the service for that participant can be marked as Evaluated / Not Required. In many programs, that status will count toward a successful completion in the overall career plan.

This is an excellent tool to use if:

- new services need to be added to multiple participants simultaneously or
- if new requirements have been added to a program or
- an existing participant shifts into a new program and the existing career plan does not have the services required by the new program or
- an entire cohort of participants need an update for completion.

Best Practice

A best practice is to ensure that at least one participant has all the services added to the career plan. Then, go service by service selecting the column – Total Customers without Step/Service to update all other participants.