

Purpose

The Customer Support Center/IWIS (IWIS) Account/User Management Tool provides partners who have been granted access the ability to:

- Manage access of IWIS Tools for staff and/or other partner accounts.
- Access reports associated with their organization/site(s) and/or special projects.

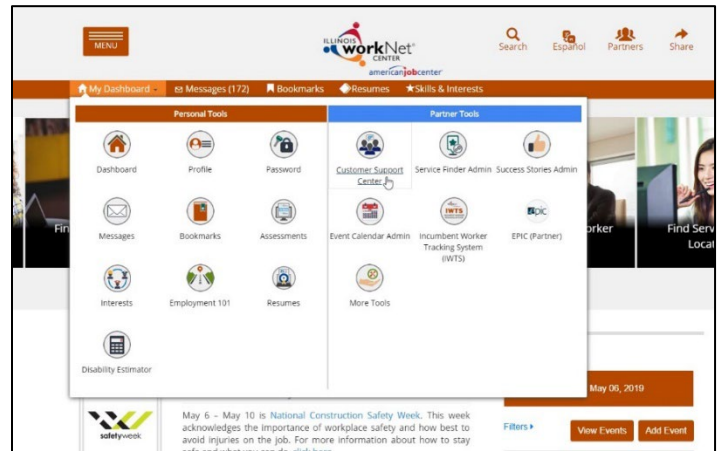
Illinois workNet Roles for Those Who Enter/Maintain Data

Public Viewer Role – This role allows staff to access partner tools and view report information for their site(s). Partners must be granted access to provider other users access to use the IWIS tools. Partners may access customer level information based upon the CSC group(s).

Individual Role – This role does not have access to partner tools.

Access Customer Support Center Tools

1. Log into <https://www.illinoisworknet.com/>.
2. Select **My Dashboard**.
3. Select **Customer Support Center/IWIS**.
4. Select **User Management Tool** icon. *The icon is the man head image in the Customer Group menu.*



Adding a Customer Without an IwN Account

5. Search by the customer's name to check if this user exists in the system. *See instructions in User Account was Found After Searching. OR* Select an agency and click **Search** to see who is in the list.
6. If the user is not found, select the **Add Partner to Group** blue button.

Last Name	First Name	Username	Group	Email	IwN Role	LWIA	Add/Remove Partner
11partner	ISETS	11partner	ISETS - Northwest - Cook County	11partner@isetstestuser.com	Public Viewer	5	+ X
12partner	ISETS	12partner	ISETS - Williamson County	12partner@isetstestuser.com	Public Viewer	7	+ X
13partner	ISETS	13partner	ISETS - CARA Program	13partner@isetstestuser.com	Public Viewer	7	+ X
14partner	ISETS	14partner	ISETS - Haymarket	14partner@isetstestuser.com	Public Viewer	7	+ X
1manager	ISETS	1manager	ISETS - Benton Township	1manager@isetstest.com	Public Viewer	25	+ X

Click the RED X by a user's name to remove them from your group.

7. In the modal window that opens, enter the information about the user, including:

- a. First Name
- b. Last Name
- c. Birth Date
- d. Phone Number
- e. Email
- f. Zip Code
- g. Organization(s):

- i. Click the box to view a list of available organizations.
- ii. **Find the agency** to which the partner is to be assigned. Hover to highlight the agency and click to select the appropriate agency.
- iii. If adding more than one organization, click the box again, then select an additional organization, following the instructions in *ii*.
- iv. Continue selecting until all appropriate agencies have been added.
- v. **AFTER all agencies have been selected, click Search.**

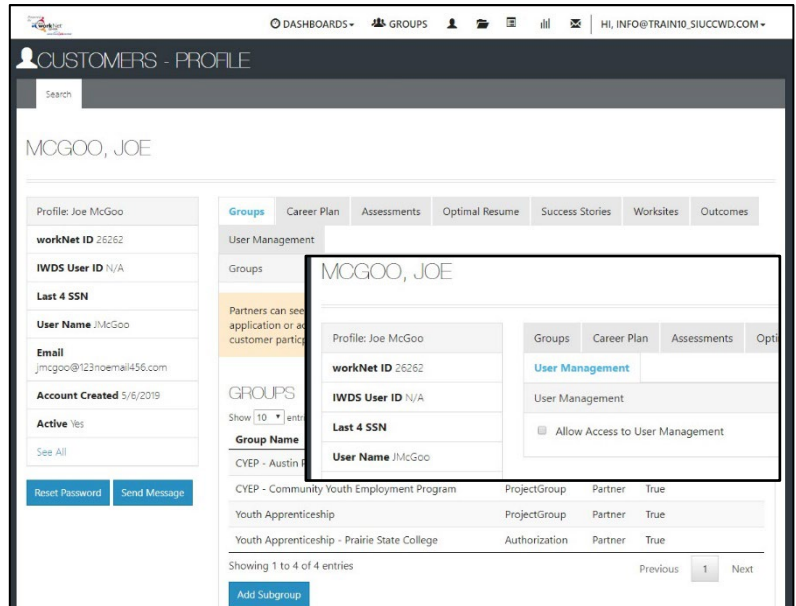
- h. If an active account is not found, the following appears *"No Account has been found with this information. Would you like to search non-active accounts?"* Click the Search Non-Active Accounts blue button.
- i. If no active or non-active account is found, the following appears *"No Account has been found with this information. Would you like to create one?"* Answer Yes.
- j. Select **Add Partner**. **This button will not work until you have selected or created an account.**

8. If you are creating a new account, at the bottom of the modal, the User Name and Password will appear. Save this information for the user. *A new Illinois workNet account has been created for the user. They will get an email notification to the email address that was entered if a new account was created.*

9. Close the modal window by clicking **Close**.

10. From the list of accounts, click on the user's last name. On the user's profile, click on the Groups tab to check the agencies to which the user has access.

11. Once the account is established, their account can manage other users by checking the box under the *User Management* tab in their profile. Checking the box allows access to manage other users at their organization. *For example: If you are currently the primary person to add new partners to your agency, you may select another user from your group, click on their last name, when the User Management tab shows, mark the box. This is only for staff members who would manage other staff members not participants.*



Adding Access for Users with an IwN Account

After clicking the **Search** button, if the user already has an account, verify that the account is correct.

1. IwN returns matches based on the search process:
 - a. 1st by Email, 2nd by name and DOB, 3rd by active accounts.
 - b. If no match is found in active accounts, the system will ask to **Search Non-Active Accounts**.
 - c. If an exact match is available, select Yes. Clicking NO closes the account.
 - d. If an exact match is not present, verify the information for the user that was returned. If updates are needed (i.e. email or last name, contact the user or info@illinoisworknet.com).
2. Verify if this is the correct account.
3. Select **Add Partner**.
4. If the user already exists in the group, a message will popup that reads “**Partner Already Exists in this Group**”, if not, the user will be added to the new group.

The top screenshot shows the 'ADD PARTNER' form with the following fields filled: First Name: Joe, Birth Date: 05/06/1994, Last Name: McGoo, Phone Number: 6546546543, Email: jmcgoo@123noemail456.com, ZIP Code: 60124. The 'Organizations or Groups to Add Partner to' dropdown is set to 'CYEP - Austin Peoples Action Center'. A 'Search' button is visible. Below the form, a message states: 'A match has been found based on the information provided.' The match details are: User Name: JMcGoo, Email: jmcgoo@123noemail456.com, First Name: Joe, Last Name: McGoo, Birthday: 5/6/1994. At the bottom, there are radio buttons for 'Is this the correct account? Yes' and 'No'.

The bottom screenshot shows the 'ADD PARTNER' form with the following fields filled: First Name: Rick, Birth Date: 05/06/1994, Last Name: McGoo, Phone Number: 6546546546, Email: nickmcgoo@123noemail456.com, ZIP Code: 60124. The 'Organizations or Groups to Add Partner to' dropdown is set to 'Youth Apprenticeship - Prairie State College'. A 'Search' button is visible. Below the form, a yellow warning message states: 'A potential match has been found based on the first name, last name, and date of birth. If this is the correct account and the email is incorrect please contact the user or info@illinoisworknet.com to have it changed.' The match details are: User Name: RMcGoo, Email: rick@123noemail456.com, First Name: Rick, Last Name: McGoo, Birthday: 5/6/1994. At the bottom, there are radio buttons for 'Is this the correct account? Yes' and 'No', and 'Add Partner' and 'Close' buttons.

User Account was Found After Searching

1. Click the “+” icon, in the row with the partner’s name, to **Add Partner to Group**. Users who are inactive will have an info bubble by the “+” and “x” icons. Once added to the group, they automatically become active again.
2. Information in user’s profile will autofill required fields needed for addition into the group. Complete the required fields missing information. If updates are needed (i.e. email or last name), then contact the user or info@illinoisworknet.com.
3. Select the group(s) to which the user is to be added. Click in the box to see a list of groups from which you can select.
4. **Click Search**. *The results will return that some information does not match if information is missing on partner account. In this example, the Birth Date* was added.* If the account is correct, select “Yes” and continue.
5. Select **Add Partner**.
6. Verify information was properly added by clicking on the user’s hyperlinked Last Name in the list.

The screenshot shows the 'ADD PARTNER' form with the following fields filled in:

- First Name: WPP
- Last Name: Train25
- Birth Date: 05/06/1994
- Phone Number: 2177897897
- Email: info@train25_illinoisworknet.com
- ZIP Code: 62707
- Organizations or Groups to Add Partner to: CYEP - Austin Peoples Action Center

Below the form, a message states: "An account has been found with this email address but some information does not match." The autofilled information is as follows:

- User Name: info@train25_siuccwd.com
- Email: info@train25_illinoisworknet.com
- First Name: WPP
- Last Name: Train25
- Birthdate: N/A

At the bottom, there is a question: "Is this the correct account? Yes No ". There are "Add Partner" and "Close" buttons at the bottom right.

Partner1	Train	trainWP1	Youth Apprenticeship - Youth Build McLean County	train@1noemail.com	Public Viewer	+ x
Partner1	Cptest	CPTest1	Career Pathways - Youth Build McLean County	cptest1@noemail123.com	Public Viewer	+ x

Simple Instructions

1. Add New Partner
2. Enter Name, email, DOB, zip code
3. Select an agency
4. Search Partner
5. Add new or select.
6. Add partner – you cannot add a new partner until you have searched for the partner.