

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.
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 **Climate Works**.
6. Select the **participant's name** to access their information.
7. Select the **Case Notes** link in the Participant Summary Tools.

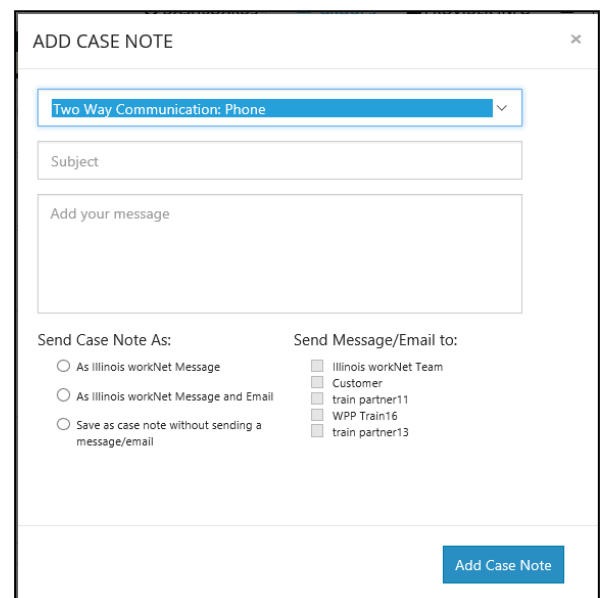
Additional resources:

[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.



The screenshot shows a web form titled "ADD CASE NOTE" with a close button (X) in the top right corner. At the top, there is a dropdown menu with "Two Way Communication: Phone" selected. Below this is a "Subject" input field. The main body of the form is a large text area labeled "Add your message". At the bottom, there are two columns of radio and checkbox options. The first column, "Send Case Note As:", has three radio buttons: "As Illinois workNet Message", "As Illinois workNet Message and Email", and "Save as case note without sending a message/email". The second column, "Send Message/Email to:", has five checkboxes: "Illinois workNet Team", "Customer", "train partner11", "WPP Train16", and "train partner13". A blue "Add Case Note" button is located at the bottom right of the form.

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 are navigation tabs: Overview, Intake/Referral, Training/Services, and Program Completion/Follow-Up. Below the tabs, there are search filters for Start Date and End Date, and buttons for Add Case Note, Filter, and Export. A dropdown menu shows '50' entries. A search bar is also present. The main table displays case notes with columns: Task, Contact Date, Subject, Comment, Delivery Method, Entered By, Entered, Source, and Options. The first entry is for 'Training' on '2/1/2022' with subject 'Confirmed OSHA Training', comment 'Test', and delivery method 'As Illinois workNet Message and Email'. It was entered by 'Latoya McRae' on '2/1/2022' at '3:32 PM' from source 'lwN'.

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	

Adding a Case Note from Participant’s Progress Page

On the participant’s progress 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.

[Progress](#) | [Intake](#) | [Career Plan](#) | [Referral](#) | [Program Completion/Follow-Up](#)

PROGRESS

CASE NOTES() ▾

[Add Case Note](#) [Close](#)

Profile: John Bush	Refresh Status	Last updated: 01/09/2024 12:17
Email: johnbush@noemail.com	View/Edit	Intake: ⓘ
DOB: 9/1/2007		Career Assessment: Attention
Last 4 SSN: N/A		Service Needs Assessment: Good
See All		Customer Status: Enrolled

Attention

ADD CASE NOTE [Close]

Select A Task ▾

Contact Date *
5/19/2022

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.