## 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.

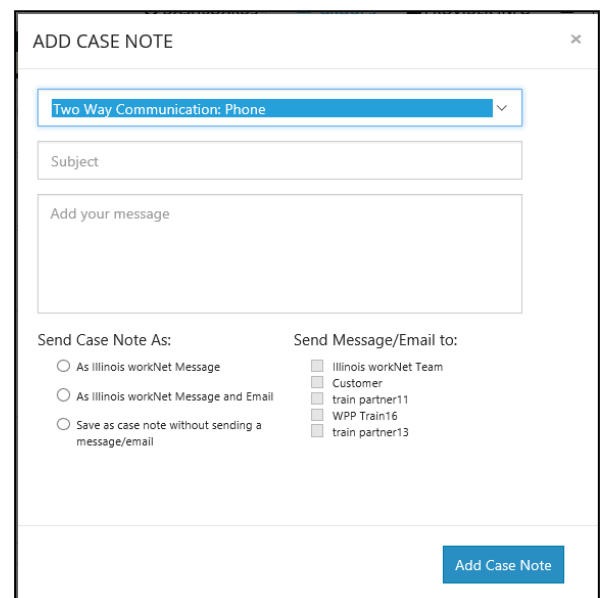> Additional resources:
>
> Telling the Story in CaseNotes
>
> Case Note Rubric.pdf

## 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.

For more information, please refer to the footer at the bottom of any webpage at illinoisworknet.com.

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Case Notes can be:

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



**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.

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## PROGRESS

CASE NOTES()▼

[Add Case Note] ✖ Close

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

## ADD CASE NOTE ✕

Select A Task ⌄

Contact Date *

📅 5/19/2022

← Add Case Note ✖ Close

CASE NOTES(6)▼

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]

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