



One Case Note to Multiple Individuals Procedure

Step 1: Services for Workforce Staff

- Manage Individuals
 - One Case Note to Multiple Individuals

This screenshot shows the 'Services for Workforce Staff' section of the system. The 'Manage Individuals' dropdown menu is open, and 'One Case Note to Multiple Individuals' is selected. Other options include 'Create an Individual', 'Assist an Individual', and 'Privileges'. The main interface shows tabs for 'Summary', 'Case Notes', 'Activities', and 'Documents (Staff)'. There are also links for '[Add New Case Note]' and '[Print Selected Case Notes]'.

Step 2: Case Note Details (Select as appropriate):

- Program: Title I – Workforce Development (WIOA)
- LWIA/Region: Chicago Cook Workforce Partnership
- Office Location: Your Agency Name
- Contact Date: Date Service/Activity Provided
- Subject: (i.e. support service/transportation, Job readiness Training/resume development)
- Contact Type: DO NOT LEAVE BLANK
- Add a DETAILED Case note Description

This screenshot shows the 'Case Note Template' form. The 'Autofill by Template' dropdown is set to 'None Selected'. The 'Case Note Details' section includes dropdown menus for 'Program' (Title I - Workforce Development (WIOA)), 'LWIA/Region' (Chicago Cook Workforce Partnership), and 'Office Location' (Chicago Heights Workforce Center at Prairie State College (771C)). There is also a checkbox labeled 'Please check to suppress this Case Note'.

Step 3: Case Note Recipients

- Click on: Search for Individuals
- You will be directed to the Quick Assist screen.
- Scroll down to General Criteria
- Enter First Name and Last Name then click Search

General Criteria

Individual Username:

Individual User ID:

Starts with these #s
 Matches exactly

State ID Number:

First Name:

Last Name:

SSN (last 4 digits):

Step 4: Check the select box at right side of the bar then click on continue

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Select
TDRAPE0104	Tom	Drape	4010		3917875	04/23/2019		04/23/2019	<input checked="" type="checkbox"/>

1 Records found

SEARCH CRITERIA: First name begins with tom and Last name begins with drape and LWIA equals Chicago Cook Workforce Partnership and program participation is WIOA and Program equals WIOA

Records per page:

[\[New search criteria \]](#) [\[Modify current criteria \]](#)

You will be redirected to the Case note section. Scroll down to the bottom of page and click on the [\[Search For Individuals\]](#)

The screenshot shows a sidebar on the left with navigation options like 'Live Data', 'Customer Relationship Management', and 'Communications'. The main content area is titled 'Case Note Recipient(s)' and contains a table with the following data:

Login Name	First Name	Last Name	Last 4 SSN	Include App ID	Action
JTORRES1234	Jesse	Torres	3103	<input type="checkbox"/> 366511	Remove

Below the table, there is a pagination control showing 'Page 1 of 1' and a 'Rows' dropdown set to 25. At the bottom, there is a search button labeled '[Search For Individuals]' and two buttons labeled 'Save' and 'Cancel'.

Repeat step 3:

- You will be directed to the [Quick Assist](#) screen.
- Scroll down to [General Criteria](#)
- Enter First Name and Last Name then click Search

Repeat step 4: Check the [select](#) box and then select the [continue](#) button to add another individual to mass case note list

This screenshot shows the same 'Case Note Recipient(s)' interface but with three entries in the table:

Login Name	First Name	Last Name	Last 4 SSN	Include App ID	Action
BWILLIAMS0004	Bill	Williams	0004	<input type="checkbox"/> 366202	Remove
JTORRES1234	Jesse	Torres	3103	<input type="checkbox"/> 366511	Remove
TDRAPE0104	Tom	Drape	4010	<input type="checkbox"/> 367107	Remove

The interface also includes the same pagination and search controls as the previous screenshot.

Step 5: Save List

Once you have added all the individual clients to your list click on the

- [Save New list](#)

You should see a (*pop up window*) **List Title:** Name the record and select *continue*

SEARCH CRITERIA: First name begins with tom and Last name begins with drape and LWIA equals Chicago Cook Workforce Partnership and program participation is WIOA and Program equals WIOA

Enter a list title below to save the records you have selected above so you can review them at a later time.

* List Title:

[Save] [Cancel]

Records per page: 25 [Go]

[Continue]

[New search criteria] [Modify current criteria]

Step 6: Save

Case note has been sent to each of the individuals listed on the (List Title) you have created.

This is the TRAINING site. DO NOT enter real client data.

Login Name	First Name	Last Name	Last 4 SSN	Include App ID	Action
BWILLIAMS0004	Bill	Williams	0004	<input type="checkbox"/> 366202	Remove
JTORRES1234	Jesse	Torres	3103	<input type="checkbox"/> 366511	Remove
TDRAPE0104	Tom	Drape	4010	<input type="checkbox"/> 367107	Remove
SSANTA1100	Sandra	Santa	1100	<input type="checkbox"/> 367274	Remove

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[Search For Individuals]

[Save] [Cancel]