

A produ partier of the American obcenter network

69 WEST WASHINGTON I SUITE 2860 I CHICAGO, ILLINOIS 60602 I TEL 312 603-0200 I FAX 312 603-9939/9930

# One Case Note to Multiple Individuals Procedure

### Step 1: Services for Workforce Staff

- Manage Individuals
  - One Case Note to Multiple Individuals

		This Is 1	he TRAINING sit	e. DO NOT e	nter real client data.	
Menu		삼 Home	🚺 My Dashboard	€⇒ Sign Out	Services for Individuals	Quick Search
My Staff Resources	-				Assessments	
My Staff Account					🕂 🛅 Report Profile	
Directory of Services						
<ul> <li>Services for Workforce</li> <li>Staff</li> </ul>	Su	<u>mmary</u>	Case	Notes	Activities	Documents (Staff)
			[Add N	lew Case No	te   Print Selected Case Notes ]	
Manage Individuals	Create an Individual					
Manage Employers	One Case Note to	<u>rivileges</u>				
Manage Résumés	Multiple Individuals	<u>1</u>				
Manage Job Orders	Assist an Individual	_				
Manage Labor Exchange						

#### Step 2: <u>Case Note Details</u> (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 Is the TRAINING site. DO NOT enter real client data.	
Menu	祄 Home 🕢 My Dashboard 🕞 Sign Out 🐣 Services for Individuals	Quick Search 🔎
TORRES, JESSE		
Service Tracking: ON	Case Note Template	
Release Individual		
Assist a new Individual	Autofill by None Selected	
My Staff Workspace		
My Staff Dashboard	Case Note Details	
My Staff Resources		
My Staff Account	Program:	
Directory of Services	litie I - Workforce Development (WIOA)	
	*LWIA/Region: Chicago Cook Workforce Partnership +	
<ul> <li>Services for Workforce</li> <li>Staff</li> </ul>	Office	
Managa Individuala	Chicago Heights Workforce Center at Prairie State College (7710 V	
Manage Individuals	Place check to suppress this Case Note.	
Manage Employers	Flease check to suppress this case Note	

#### Step 3: Case Note Recipients

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

Manage Employers	General Criteria	
Manage Résumés	<u>oonoral ontoria</u>	
Manage Job Orders	Individual Username:	
Manage Labor Exchange 🔹	Individual User ID:	
Manage Activities		Starts with these #s
Manage Providers		Matches exactly
Manage Case Assignment 🕨	State ID Number:	
Manage Follow-Up	State 10 Number.	
Manage Surveys	First Name:	jesse
Manage Online Forms	Last Name:	torres
Reports	SSN (last 4 digits):	

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

Menu	ign Out 🚱 🖓 My Dashboard 🛛 🕞 Sign Out									Quick Search 🔎
My Staff Resources	<u>User Name</u>	First Name	Last Name	<u>SSN</u>	<u>Vet</u>	<u>State ID</u>	<u>Last Login Date</u>	<u>Last</u> Exited	<u>Created</u>	Select
Directory of Services	TDRAPE0104	Tom	Drape	4010		3917875	04/23/2019		04/23/2019	V
<ul> <li>Services for Workforce</li> <li>Staff</li> </ul>									Save	New List
Manage Individuals		1 Records found								
Manage Employers	SEARCH CRITERIA: Firs Program equals WIOA	t name begins with to	m and Last name t	begins with	drape an	d LWIA equals Chica	ago Cook Workforce Partnersi	nip and program	m participation is WIO.	A and
Manage Résumés 🔹 🕨										
Manage Job Orders			I	Records	per pa	ge: 25 ▼	Go			
Manage Labor Exchange 🛛 🕨										
Manage Activities						Continue				
Manage Providers			[ N	ew sear	ch crite	ria 1 (Modify cur	rrent criterial			
Manage Case Assignment 🕨			1							
Manage Follow-Up					M. 6	- # Daabb				
Manage Surveys					My St	aff Dashboar	a			

You will be redirected to the Case note section. Scroll down to the bottom of page and click on the

#### [Search For Individuals]

Live Data Customer Relationship Management	Case Note Rec	ipient(s)								
Create a Marketing Lead	Login Name	First Name	Last Name	Last 4 SSN	Include App ID	Action				
Contacts List					•					
Marketing Leads	JTORRES1234	Jesse	Torres	3103	366511	<u>Remove</u>				
Outreach Campaign(s)										
Work items		Rows 25 -								
Appointments										
Online Surveys			[Search For	Individuals]						
Communications	Save Cancel									

Repeat step 3:

- You will be directed to the <u>Quick Assist</u> screen.
- Scroll down to General Criteria
- Enter First Name and Last Name then click Search

Repeat step 4: Check the <u>select</u> box and then select the <u>continue</u> button to add another individual to mass case note list

Menu		🗥 Home 🕜	My Dashboard 🕞 Sign Out	t		Quick Sea				
Marketing Leads										
Outreach Campaign(s)	Case Note Recip	oient(s)								
Work items										
Appointments										
Online Surveys	<u>Login Name</u>	<u>First Name</u>	<u>Last Name</u>	Last 4 SSN	Include App ID	Action				
Communications	BWILLIAMS0004	Bill	Williams	0004	366202	Remove				
Aessages	JTORRES1234	Jesse	Torres	3103	366511	Remove				
Correspondence	TDRAPE0104	Tom	Drape	4010	367107	Remove				
Alerts 🕨										
Email Log	Image         Image <th< td=""></th<>									
– Templates										
Job Order Skill Sets		[Search For Individuals]								
Job Order Templates			Save	Cancel						

### 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

Menu	☆ Home 🕜 My Dashboard 🕞 Sign Out 💄 Services for Individuals Quick Search 🔎
My Staff Dashboard	Save New List
My Staff Resources	1 Records found
My Staff Account	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 Brogram equals WIOA
Directory of Services	
	Enter a list title below to save the records you have
Staff	* List Title:
Manage Individuals	AC lemporary closure 05/25/2020
Manage Employers	[ <u>Save</u> ] [ <u>Cancel</u> ]
Manage Résumés	
Manage Job Orders	Records per page: 25 V
Manage Labor Exchange 🔸	
Manage Activities	Continue
Manage Providers	[ New search criteria ] [Modify current criteria]
Manage Case Assignment 🕨	
Manage Follow-Up	

## 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 s	ite. DO NOT enter real o	client data.					
Menu	🏫 Home 🕜 My Dashboard 🕞 Sign Out								
Work Items									
Appointments		<b>P</b> <sup>2</sup> - 1 <b>N</b>							
Online Surveys	<u>Login Name</u>	<u>First Name</u>	Last Name	Last 4 SSN	Include App ID	Action			
Communications	BWILLIAMS0004	Bill	Williams	0004	366202	Remove			
Messages	JTORRES1234	Jesse	Torres	3103	366511	<u>Remove</u>			
Correspondence	TDRAPE0104	Tom	Drape	4010	367107	Remove			
Alerts	SSANTA1100	Sandra	Santa	1100	367274	Remove			
Email Log									
Templates			Page 1 -	of 1 본 🕅		Rows 25 -			
Job Order Skill Sets									
Job Order Templates			[Search For In	dividuals]					
Communication Templates			Save	Cancel					
Case Note Templates									
Search List									