CHICAGO COOK WORKFORCE PARTNERSHIP
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One Case Note to Multiple Individuals Procedure

Step 1: Services for Workforce Staff

- Manage Individuals
    - One Case Note to Multiple Individuals

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

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

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

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

[Search For Individuals]

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

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*

Step 6: Save

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