

Welcome to CalJOBS Training! In this training, we will learn about the Case Management features in CalJOBS.

Objectives

- Create Participation
- Complete an Individual Employment Plan (IEP)
- Add subsequent activities and case notes
- Close activities

2

In this module, we will:

- Create Participation – Once eligibility is established through the application, we create participation to enroll the individual into the program.
- Complete an Individual Employment Plan (IEP).
- Add subsequent activities and case notes – We will learn how to add activities to track services provided to the individual and attach a case note to both an activity and the Title I application.
- Close activities – Finally, we will learn how to close activities when we are done providing a services. You really want track all services provided to your individuals.

Creating Participation

What is Participation?

- Completing a WIOA Title I Application does not automatically enroll an individual into a Title I program.
- In order to enroll an individual in a Title I program, including a special grant program, staff must create Participation.
- Participation is created by entering a Participation date and adding their first activity code.
- Once Participation is created, additional activities can be added to the individual's Title I Application.

Assisting an Individual

Menu Home My Dashboard Sign Out Services for Individuals Services for Employers

Quick Search Enter Search...

My Staff Workspace

My Staff Dashboard My Staff Resources My Staff Account Directory of Services

Saved Lists

Individuals Assisted: [Joplin, Janis \(PEARL2017\)](#), [LaTroll, Poppy \(PINKFLOWER\)](#), [Wayne, Bruce \(BRUCE WAYNE89\)](#), [Richmond, Lyndsey \(RICHMONDL16\)](#)

Employers Assisted: [Santa's Toy Shop \(SANTAHELPER\)](#), [CalSTRS \(C8032926\)](#), [CALIFORNIA \(SU1\)](#)

My Calendar

January 2017

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

0 New Appointments
31 Upcoming Events

Enter the Appointment Center

Services for Workforce Staff

Manage Individuals

Manage Employers

Manage Resumés

Manage Job Orders

Create an Individual

One Case Note to Multiple Individuals

Assist an Individual

Create Date

ts available

After logging into the system, the first page you will see is **My Staff Dashboard**. On the left navigation menu you will see a gold tab called **Services for Workforce Staff**. In that tab, hover over **Manage Individuals** and select **Assist an Individual** from the flyout menu, as shown in the lower circle.

Or, if you have previously assisted individuals, you can choose from the recently assisted list of individuals in the **Saved Lists** widget, shown in the top circle.

Assisting an Individual

[General | Office]

Quick Assist

You have saved Individual item(s) in [My Search Lists](#).

Here are the 5 most recent individuals you assisted:

- Joplin, Janis (PEARL2017) Assist
- LaTroll, Poppy (PINKFLOWER)
- Wayne, Bruce (BRUCE_WAYNE89)
- Richmond, Lyndsey (RICHMONDL16) Search

General Criteria

Individual Username:

Individual User ID:

StateID Number:

First Name:

Last Name:

SSN (last 4 digits):

SSN (full number): Example: 999999999

State Source ID:

State Activity ID:

Date of Birth: (mm/dd/yyyy)

Quick Search

wayne,bruce

WAYNE, BRUCE

Username: BRUCE_WAYNE89
User ID: 30052496
SSN: ***-**-8666
State ID: 1001000370
Location: HERCULES CA 94547

WAYNE, BRUCE

Username: BWAYNE6300
User ID: 30577740
SSN: ***-**-6300
State ID: 1001474296
Location: DUBLIN CA 94568

6

There are different search options including **Quick Assist** and **General Criteria**. Also, there is a **Quick Search** at the top right corner of every page.

It is recommended to search by full name and the last 4 digits of the individual's Social Security Number. This will help eliminate the likelihood of opening the wrong person's profile.

Selecting an Individual

Results View: [Summary](#) | [Detailed](#)
To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	RTW	Last Exited	Created	Action	Select
BRUCE WAYNE89	Bruce	Wayne	9666		1001008370	02/09/2015	N		02/09/2015	Summary Tab Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>
 SBE VETERAN											
BWAYNE6300	Bruce	Wayne	6300		1001474286	04/27/2016	N		02/02/2016	Summary Tab Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>

[Save New List](#)
[Update Existing List](#)

2 Records found

Still, your search results may give you more than one individual user. Find the individual you would like to create a WIOA application for, and select the “[Programs Tab](#)” link in the far right Action column.

Verifying Right to Work Documents

Right to Work Verification

Documentation to Right to Work must be provided to assist this individual. Please complete the following information.

Individual: Tracy Tone

Current Citizenship:

USCIS (Alien Registration) Number:

USCIS (Alien Registration) Expiration Date:  [Today](#)

[Save](#) [Cancel](#) [Remind me later](#)

Next, you may see a **Right to Work Verification** screen. Staff can enter the information, or bypass by selecting the Remind me later link at the bottom of the page.

Programs Tab

Case Summary
Programs
Plan
Assessments

Show Summary Tabs
Bridges, Brody

Filter Applications:

Filter Activities:

 Open
 Closed
 Voided

Filter Programs

Title I - Workforce Development

[Create Title I - Workforce Development \(WIOA\) Application](#)

Apps: 1

WIOA #15696306 - Complete

LWA:	99 - WIOA Statewide Grant Contractor	Application Date:	02/07/2017
Onestop:	2198 - HOMEBOY INDUSTRIES	Participation Date:	N/A
Open/Total Activities:	0 / 0	Closure Date:	N/A
		Exit Date:	N/A

After the Right to Work verification reminder, the Programs tab will appear. Scroll down on this page until you see the previously completed Title I- Workforce Development Application (identified by the arrow). You may click anywhere in the light gray box (outlined in pink) to expand the rest of the Title I application sections.

Create Participation

Title I - Workforce Development Apps: 1

WIOA #2238703 - Complete

LWIA:	99 - WIOA Statewide Grant Contractor	Application Date:	02/21/2017
Onestop:	2163 - (Training) Generic Statewide Contractor Office	Participation Date:	N/A
Open/Total Activities:	0 / 0	Closure Date:	N/A
		Exit Date:	N/A

Case Information

ABC Eligibility Date: N/A	Adult Eligibility Date: 02/21/2017
Dislocated Worker Eligibility Date: N/A	Youth Eligibility Date: N/A
Incumbent Worker Eligibility Date: N/A	

Location and Staff

LWIA: 99 - WIOA Statewide Grant Contractor	Onestop: 2163 - (Training) Generic Statewide Contractor Office
Create Staff Username: 31829	Edit Staff Username: 31829
Case Manager: N/A	Temporary Case Manager: N/A

Eligibility Summary

Participation	N/A
---------------	-----

[Create Participation](#)

This is what your screen will look like after expanding. Notice a number of light gray “ribbons” that are now present within the application. Select anywhere in the second down, light gray ribbon titled **Participation** (highlighted in pink) to expand the Participation section. Next, select the Create Participation link.

Note: If you do not create Participation for an individual, they will not be enrolled in the program. Creating an application only establishes that they are eligible for the program, but does not enroll.

General Information	
Staff User Add:	31829
State ID:	31806
Name:	Brody Bridges
Application Date:	02/21/2017
Earliest Eligibility Date:	02/21/2017

Participation Information	
* Participation Date:	<input type="text"/> (mm/dd/yyyy) Today
Participation Age:	24

Cancel | **Next**

11

At the top of this page there will be **General Information** regarding this individual and the application. In the **Participation Information** section, simply enter the Participation Date in the corresponding field. This should be the date staff provide the first service to the individual. It cannot be before the Eligibility Date and it cannot be a future date. The rest of the information is auto-filled from the Individual Profile.

Select the “Next” button to continue.

General Information	Service Provider
General Information	
Participant User Name:	BRODYBRIDGES
Participant State ID:	31806
Last Name, First Name MI:	Bridges, Brody
Social Security Number:	6868
Address:	555 Sunshine Ln Redding, CA 96001
Application Summary:	Program:WIOA Application Date:2/21/2017 Earliest Eligibility Date:02/21/2017
Participation Date:	02/21/2017
Customer Program Group:	93 - Statewide Adult
LWIA Region:	WIOA Statewide Grant Contractor
Office Location:	L & R Career Center
Agency Code Search:	Click Here

12

After selecting “Next”, you are now on the Activity Enrollment- General Information page. This is because creating Participation includes creating the first activity code for an individual.

We see several tabs at the top of this page. We begin with the **General Information** tab and ensure that the **Customer Program Group** is the appropriate category. Since this person was eligible to receive services for the WIOA Statewide Adult grant program, the 93 – Statewide Adult group is chosen. If this individual was eligible to receive services from multiple programs, as defined in the Title I application, those options would populate here.

Be sure to select your LWIA Region and the Office location if it is not auto-filled. Here we selected WIOA Statewide Grant Contractor as our LWIA Region and L & R Career Center as our fictional office.

The screenshot shows the 'Enrollment Information' section of a form. At the top, there are two tabs: 'General Information' (highlighted with a pink box) and 'Service Provider'. Below the tabs, the 'Enrollment Information' section contains the following fields:

- Grant:** A dropdown menu showing '2042 - WAF 6.0 Adult Participant' with a pink arrow pointing to it.
- WIOA Title II Partner Program:** A checkbox labeled 'Yes, service is a WIOA Title II Partner Program.' which is unchecked.
- Activity Code:** A field containing '101 Orientation' with a pink circle around it. Below the field is a link that says '[Select Activity Code]' with a pink arrow pointing to it.
- Projected Begin Date:** A date field with a calendar icon and the text 'Today'.
- Actual Begin Date:** A date field containing '02/09/2016' with a pink arrow pointing to it. Below the field is the text 'Actual begin date may not be modified on the first activity.'
- Projected End Date:** A date field containing '02/10/2016' with a calendar icon and the text 'Today'.
- Any classes attended through Distance Learning:** Radio buttons for 'Yes' and 'No', with 'No' selected.

The number '13' is visible in the bottom right corner of the form area.

Still within the **General Information** tab, we are now under **Enrollment Information**. If you are serving your individual with a WIOA special grant, select the grant from the **Grant** dropdown. In our example, our individual is not receiving services from a WIOA grant, therefore we are keeping this field as “Non Selected”.

To select an Activity Code, use the link titled “Select Activity Code.” This will generate a pop-up box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the **Activity Code** box. For training purposes today, we chose “101 Orientation.”

Next, your **Actual Begin Date** will auto-populate. Creating Participation is the only instance where your **Actual Begin Date** will auto-populate. When creating subsequent activities, you must manually enter an actual begin date.

Projected end date is when you believe the activity will be completed. Enter a date in the **Projected End Date** box.

Staff Information

Staff ID: 30532206

Position: Staff

Current Case Manager: Case currently Not Assigned to a Case Manager
[Assign Case Manager](#)
[Assign Me](#)
[Remove Case Manager Assignment](#)

Previous Case Manager:

Comments:

Case Notes: [[Add a new Case Note](#) | [Show Filter Criteria](#)]

ID	Create Date	Subject	Action
No data found.			

[Next >>](#)

[Exit Wizard]

14

Finally, **Staff Information** is where you can assign a case manager, enter a comment, or create a case note. Be sure to select “Next” to save information and move on.

Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information
Enrollment Service Provider Information					
Enrollment Summary:		Enrollment ID: 2796670 Username: BRODYBRIDGES WIOA Application ID: 2238703 Activity Code: 101 Activity Dates: 2/21/2017 - 2/21/2017			
* Provider:	<input type="text" value="Local Provider"/> [Select Provider]				
* Service, Course or Contract:	<input type="text" value="Local Program"/> [Select Service, Course or Contract]				
Provider Locations:	<input type="text"/> <input type="text"/> [Select Provider Locations]				
Provider Contacts:	<input type="text"/> [Select Provider Contacts]				
* Occupational Training Code:	Not Applicable				
				<input style="background-color: #FFD700;" type="button" value=" << Back "/> <input style="background-color: #FFD700; border: 2px solid #FF00FF;" type="button" value=" Next >> "/>	
					15

Now that we've completed the fields within the **General Information** tab, you will be brought to the **Service Provider** tab. For all activity codes, you will complete this tab.

For services that your office or organization provide, you will select yourself as the local provider of that service. To select the provider, click the "Select Provider" link. Then, select the appropriate provider name from the pop-up box. Next, click the "Select Service, Course or Contract" link and choose the appropriate Service, Course or Contract name of that service being provided.

Select the "Next" button to continue.

Depending on the activity code you are entering, you may skip some of the enrollment tabs and be directed straight to the **Closure Information** tab. If you do not wish to close the activity at this time do not enter **Last Activity Date** or **Completion Code**; instead select **Finish**.

If you do wish to close the activity, enter a **Last Activity Date** and then choose the **Completion Code** from the drop down menu. Then, select “Finish”.

Reminder: The first service activity code entered begins an individual’s participation in the program.

Participation 02/21/2017

[Edit Participation](#)

Participation Date: 02/21/2017

School Status: Not attending school: Secondary School Graduate or has a recognized equivalent **Employment Status:** Not Employed

Activities / Enrollments / Services 1

[Create Activity / Service / Enrollment](#)

Search:

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	101 - Orientation Local Provider		Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

Page: 1

Rows: 10

After selecting “Finish”, you will see information on the **Participation** ribbon within the Title I Application, along with the “Edit Participation” link.

In addition, the **Activities/Enrollments/Services** ribbon now has an activity table with the first service provided to this individual.

Completing an Individual Employment Plan (IEP)

Staff Profiles > Plan

An Individual Employment Plan (IEP) is a case management tool which tracks a participant's goals, objectives, and services.

- Staff Profiles
 - General Profile
 - Case Management Profile
 - Case Summary
 - Programs
 - Plan**
 - Assessments
 - Report Profile

19

The Individual Employment Plan (IEP) is a function within CalJOBS which enables staff to record participants' goals, objectives, and services concerning their employment program(s).

The IEP is located on the Plan link under Staff Profiles >Case Management Profile.

Why Use the IEP?

Using the IEP, staff will be able to:

- Develop a professional plan
- Define a goal
 - Employment / Training / Skills
- Set objectives for the goal
- Review completed services and activities concerning the goal
- Develop employment plans and service strategies

20

Using the IEP, staff will be able to:

- Develop a professional plan
- Define a goal (Employment / Training / Skills)
- Set objectives of the goal
- Review completed services and activities concerning the goal
- Develop employment plans and services strategies

The IEP allows for staff and the individuals to establish a defined goal towards employment, training, or skill needs. Completed IEP goals can be printed and signed by both staff and the individual as a type of contract of expectations, to review at estimated dates of completion.

IEP Process Flow

When creating an IEP...



Plan

Goals

Objectives

When closing an IEP...



21

When creating an IEP, start by providing plan information, then add goals to the plan, then objectives to the goal.

When closing an IEP, start from right to left by closing the objectives, then the goals, and then the plan.

Creating an IEP

- An individual can only have one IEP open at a time
- The IEP can be used by both Title I and Title III staff to case manage an individual

The screenshot displays a web application interface for creating an Individual Employment Plan (IEP). The interface is divided into three main sections: a navigation menu on the left, a header area with tabs, and a main content area. The navigation menu includes categories such as 'My Individual Profiles', 'My Individual Plans', and 'Staff Profiles', each with a list of sub-items. The header area features two tabs: 'Programs' and 'Plan'. The main content area is currently on the 'Plan' tab. It contains two sections: 'Objective Assessment Summary' and 'Individual Employment Plan'. Both sections display the message 'There are No Objective Assessment Summaries' and 'There are No Individual Employment Plans' respectively. Below each message is a button to create the respective item. The 'Create Individual Employment Plan/Service Strategy' button is circled in pink.

Once assisting an individual, open the Staff Profiles > Case Management Profile > Plan link.

Next, locate the **Plan** tab at the mid-point of the page and select the “Create Individual Employment Plan / Service Strategy” button.

Note: An individual can only have one IEP open at a time. However, the IEP can be used by both Title I and Title III staff to case manage an individual.

Plan

- Complete Plan Information (except Plan closed on date)

Plan Information

• Plan Start Date (mm/dd/yyyy) Today

• LWIA/Region ▼

• Plan started in office location ▼

Plan closed on (mm/dd/yyyy) Today

When printing plan do you want to print services?

Next >>

23

The first tab to appear will be the **Plan** tab. Complete the required **Plan Information** fields.

Enter the **Plan Start Date**, **LWIA/Region**, and the **Plan started in office location**. This identifies which office the plan originated.

You will not need to complete the **Plan closed on** date at this time. Once closed, this action cannot be undone.

Staff have the option to display services completed when printing the IEP by checking the designated box.

When finished with this page, select the “Next” button.

Goals

Next, the **Goals** tab will appear. Click Add new Goal and complete the required fields under the **Goal Information** section.

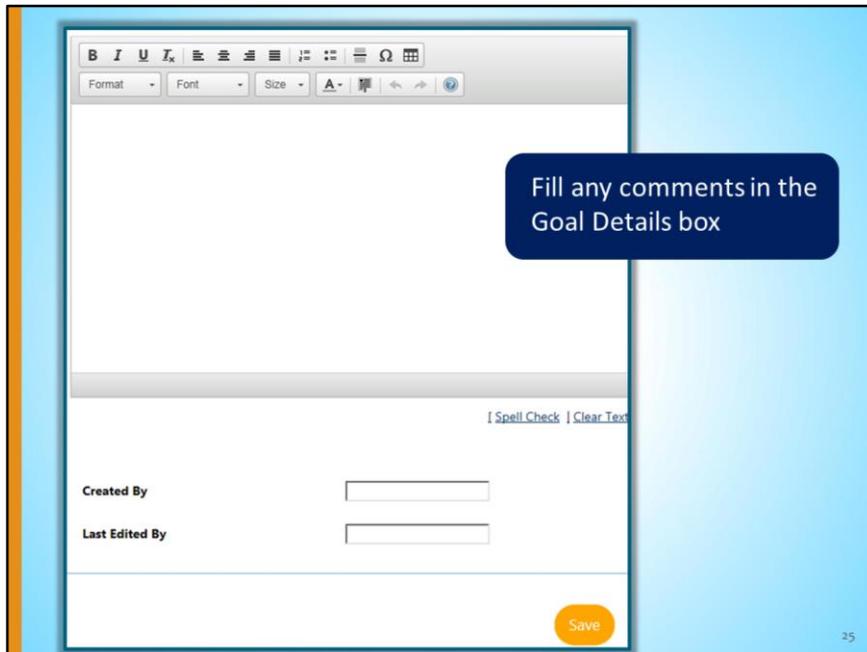
Select the **LWIA/Region** and **Office** that is associated with this goal. Select the associated program for the **Program Affiliation** field. Title I staff will select WIOA Program. Title III staff will select WP Program.

Select the **Type of Goal** and **Term of Goal** (duration) from the dropdown lists.

Enter a short **Description of Goal** in the text box provided.

Enter the **Date Established** (when the goal is initiated) and **Estimated Completion Date**.

The **Actual Completion Date** will be added later when closing the goal. The **Completion Status** defaults to “Open”.



Scrolling down within the **Goal Information** section, type details related to the goal in the **Goal Details** box. Staff should be as descriptive as possible regarding the goal the individual is trying to obtain. For example: Mark is looking to start work in an office environment. He will need typing and training/experience using word processing and spreadsheet software.

When finished with all entries, select the “Save” button.

The screenshot shows a web interface for managing IEP Goals. At the top, there is a header 'IEP Goals'. Below it is a table with the following data:

#	Goal	Date Established	Est. date for Completion	Program
50071	Employment - Get a job	01/12/2017	01/12/2017	WIOA

Below the table, there are links for 'Add New Goal' and 'Exit Wizard'. At the bottom right of the interface, there are two buttons: '<< Back' and 'Next >>'. The 'Next >>' button is circled in pink.

- Staff can create multiple goals for an individual
- Click Next to add an Objective to the IEP Goal

26

The goal will appear in the **IEP Goals** table. Click the “Next” button to add an objective.

Note: Staff can create multiple goals for an individual within the IEP. In addition, these goals can be associated with different programs. For example, an individual can have one goal associated with the Title III Wagner-Peyser program and another goal associated with Title I WIOA program.

Objectives

Objective Information

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status
No Objective Records						

[Add new objective](#)
[Select pre-defined objectives](#)

Staff may either click [Add new objective](#) or [Select pre-defined objectives](#)

27

Next, the **Objectives** tab will appear. Staff may use pre-defined objectives or create new objectives by selecting the corresponding links. First we will look at the system's pre-defined objectives.

General Information

Username: BATMAN2016

User ID: 32574

Name: Wayne, Bruce

Objective Information

- Goal: None Selected
- LWIA/Region: Santa Cruz County Workforce Investme
- Office Location: 04535 Watsonville JS
- Program Affiliation: None Selected

Created By

If selecting pre-defined objectives, complete the required fields

28

If choosing the [Select pre-defined objectives](#) link, complete the required fields.

Select the appropriate **Goal** from the drop-down menu that this objective is associated with.

The **LWIA/Region** and **Office Location** may auto-fill.

Select the **Program Affiliation** from the drop-down menu. Once you complete the required fields, a selection of pre-defined objectives will appear (shown on next slide).

Objective Information

- **Goal** ▼
- **LWIA/Region** ▼
- **Office Location** ▼
- **Program Affiliation** ▼

	Pre-defined Objectives	Date Established	Review Date
<input type="checkbox"/>	Resume Writing	<input type="text" value="Today"/> (mm/dd/yyyy)	<input type="text" value="Today"/> (mm/dd/yyyy)
<input type="checkbox"/>	Counseling	<input type="text" value="Today"/> (mm/dd/yyyy)	<input type="text" value="Today"/> (mm/dd/yyyy)
<input type="checkbox"/>	Mentoring	<input type="text" value="Today"/> (mm/dd/yyyy)	<input type="text" value="Today"/> (mm/dd/yyyy)
<input type="checkbox"/>	Skill Assessment	<input type="text" value="Today"/> (mm/dd/yyyy)	<input type="text" value="Today"/> (mm/dd/yyyy)

29

Here are some pre-defined objectives. Select the desired objectives using the checkboxes to the left.

Enter the **Date Established** and **Review Date**. Then click the “Save” button.



The pre-defined objective now appears in the **Objective Information** table.

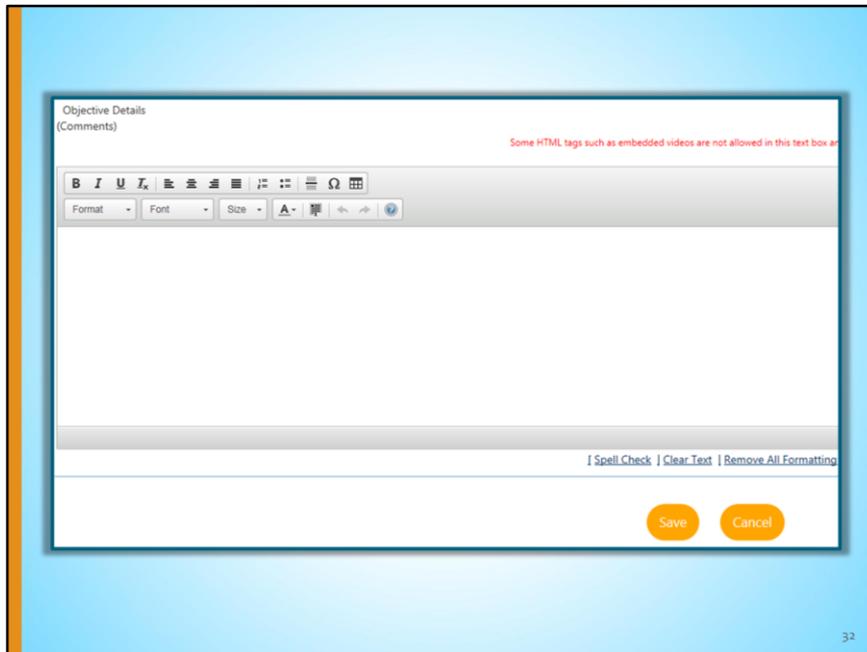
To add a new objective instead of a pre-defined objective, click the [Add new objective](#) link.

The screenshot shows a form titled "Objective Information" with the following fields:

- Goal: None Selected (dropdown)
- Goal Date Established: (text input)
- LWIA/Region: Santa Cruz County Workforce Investme (dropdown)
- Office Location: 04535 Watsonville JS (dropdown)
- Program Affiliation: None Selected (dropdown)
- Objective: (text input)
- Date Established: (text input) (mm/dd/yyyy) Today (calendar icon)
- Review Date: (text input) (mm/dd/yyyy) Today (calendar icon)
- Actual Completion Date: (text input) (mm/dd/yyyy) Today (calendar icon)
- Completion Status: Open (dropdown)
- Reason Closed: None Selected (dropdown)
- Created By: (text input)
- Last Edited By: (text input)

A dark blue callout box on the right side of the form contains the text: "If creating a new objective, complete the required fields".

After selecting the Add new objective link, complete the required fields under the **Objective Information** section.



Scrolling down, enter any details or comments in the **Objective Details** section.

Click “Save” to complete this objective.

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff
Get a job	Resume Writing	01/12/2017	02/26/2017	WIOA	James, Miriam

Exit Wizard

33

The new objective will appear in the **Objective Information** table. If desired, staff can create multiple objectives for multiple goals within the IEP.

Select “Next” to continue to the **Services** tab.

Services

Plan
Goals
Objectives
Services

IEP Services

App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
16653043 - WIOA	101 - Orientation	A - 05/11/2017	P - 05/11/2017		30292415
16653043 - WIOA	205 - Development of IEP/ISS/EDP	A - 05/11/2017	A - 05/11/2017	Employment Service	30292415

<< Back
Finish
Delete

- If a goal is affiliated with the Wagner-Peyser program, any subsequent activity codes added to the WP program application will also appear on this tab

- Similarly, if a goal is affiliated with the WIOA program, any subsequent activity codes added to the WIOA program application will also appear on this tab

34

Next, the system brings you to the **Services** tab which displays the services associated with this IEP.

When creating the IEP, the system will automatically create a 205- Development of IEP/ISS/EDP activity code on the **Services** tab. The 205 activity code will also be added to the individual's WP program application if the goal is affiliated with WP. The 205 activity code WILL NOT be automatically added to the WIOA program application if the goal is affiliated with WIOA. Title I staff must manually enter the 205 activity code if they would like it reflected on the WIOA program application.

Select the "Finish" button to complete the IEP.

Completed IEP

Individual Employment Plan

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
3714	Santa Cruz County Workforce Investment Board	04535 Watsonville JS	OPEN	1	James, Miriam	02/27/2017	Edit Delete Display/Print

Create Individual Employment Plan/Service Strategy

- Only one IEP can be created per individual
- Multiple Goals and Objectives may be added to an IEP
- Click Edit to update or close an IEP

35

Once the IEP is complete, the plan information will populate in the **Individual Employment Plan** table seen on this screen. Again, a participant can only have one IEP at a time, but multiple goals and objectives may be added to an IEP.

Click the Edit link to edit existing, or add more, goals and objectives, or close an IEP. Click the Display/Print link to view the IEP.

Individual Signature

Create PDF

Include Staff Signature

Applicant Signature

Return Print

- Select printing options
- Click Print

General Information

Plan ID: 32786
 User ID: 30707485
 Name: James, Chandler
 Plan was started on: 01/12/2017
 Plan was started in office location: [04535 Watsonville JS]
 Plan closed on: 01/12/2017

Goals and Objectives Established:

Goal #	Program Affiliation (s)	Type of Goal	Term of Goal	Date Established	Estimated Date of Completion	Actual Completion Date	Status
1	WIOA	Employment	Short Term	01/12/2017	01/12/2017	01/12/2017	Closed

Goal Description: Get a job

Comments:

Objectives to Goal #1

Objective	Date Established	Review Date	Program	Staff	Status
Resume Writing	01/12/2017	02/26/2017	WIOA	James, Miriam	Closed

Comments:

Signatures

Applicant Signature _____ Date _____ Parent/Guardian Signature _____ Date _____

Staff Signature _____ Date _____

After clicking the Display/Print link, staff may print an IEP for both the participant and staff member to sign.

Scroll down to the bottom of the page to the **Individual Signature** section. Click the **Include Staff Signature** or **Create PDF** boxes if desired.

Click the “Print” button. This document will appear in a new window for you to print or save.

IEP Process Flow

When creating an IEP...



Plan

Goals

Objectives

When closing an IEP...



37

As a reminder, when creating an IEP, start by providing plan information, then add goals to the plan, then objectives to the goal.

When closing an IEP, start from right to left by closing the objectives, then the goals, and then the plan.

Let's take a look at closing an IEP.

Closing an IEP- Objectives

3714	Santa Cruz County Workforce Investment Board	04535 Watsonville JS	OPEN	1	James, Miriam	02/27/2017	Edit Delete Display/Print
------	--	----------------------	------	---	---------------	------------	---

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status	action
Get a Job	Resume Writing	02/27/2017	04/13/2017	WIOA	James, Miriam	Open	Edit Delete

Objective Information

[Add new objective](#) [Select pre-defined objectives](#)

- Click the IEP's Edit link
- Click the Objective's Edit link
- Complete the Objective Information

Objective Information

Goal:

Goal Date Established:

LWIA/Region:

Office Location:

Program Affiliation:

Objective:

Date Established:

Review Date:

Actual Completion Date:

Completion Status:

Reason Closed:

38

First, click the Edit link within the IEP.

Next, go to the **Objectives** tab and click the Edit link on the objective you wish to close.

Under the **Objective Information** section, most required fields auto-fill. Be sure to enter the **Actual Completion Date**, **Completion Status** from the dropdown menu, and **Reason Closed** from the dropdown menu.

Click "Save."

Closing an IEP- Goals

#	Goal	Date Established	Est. date for Completion	Program	Staff	Status	Action
4004	Employment - Get a job	02/27/2017	03/06/2017	WIOA	James, Miriam	Open	Edit

Add New Goal

Goal Information

- LWIA/Region Santa Cruz County Workforce Investme
- Office 04535 Watsonville JS
- Program Affiliation
 - Wagner-Peyser (WP) Program
 - Workforce Innovation and Opportunity Act (WIOA) Program
- Type of Goal Employment
- Term of Goal Short Term
- Description of Goal Get a job
- Date Established 02/27/2017 (mm/dd/yyyy) Today
- Estimated Completion Date 03/06/2017 (mm/dd/yyyy) Today
- Actual Completion Date (mm/dd/yyyy) Today
- Completion Status Open
- Reason Closed None Selected

Save
Cancel

39

Next, go to the **Goals** tab and click the [Edit](#) link for the goal you wish to close.

Under the **Goal Information** section, most required fields auto-fill. Be sure to enter the **Actual Completion Date**, **Completion Status** from the dropdown menu, and **Reason Closed** from the dropdown menu.

Click "Save."

Closing an IEP- Plan

Plan Information

- Plan Start Date: 01/12/2017 (mm/dd/yyyy) Today
- LWIA/Region: Santa Cruz County Workforce Investme
- Plan started in office location: 04535 Watsonville JS
- Plan closed on: 03/06/2017 (mm/dd/yyyy) Today

When printing plan do you want to print services?

Next >> Delete Print

- Close all Objectives and Goals prior to closing plan
- To finish closing the IEP, enter Plan closed on date and click Next

40

Finally, go to the **Plan** tab. Now that the objectives and goals are closed, you may close the IEP.

Close the IEP by entering the **Plan closed on** date. Click the “Next” button. This will finish closing the IEP.

Note: If you select “Finish” on the **Services** tab again, another 205 activity code will be added to the individual’s WP program application. This will affect the individual’s exit date.

Closed IEP

Individual Employment Plan

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
3714	Santa Cruz County Workforce Investment Board	04535 Watsonville JS	closed	1	James, Miriam	02/27/2017	Edit Delete Display/Print

Create Individual Employment Plan/Service Strategy

Closing an IEP will not close the IEP activity code on the program application

41

The IEP will now have a status of “Closed”.

The IEP functions separately from the Activities table in the program application. In other words, closing an IEP will not close the IEP activity you created.

If trying to close a program application with an open IEP goal, staff will receive a notification message that there is a goal still open. Although staff will receive the notification, the program application itself can still be closed out.

Adding Activities and Case Notes

Where to Find CalJOBS Activity Codes



The screenshot shows the homepage of the State of California Employment Development Department (EDD). The header includes the EDD logo and the text "State of California Employment Development Department". A search bar in the top right corner contains the text "WSIN17-09" and is highlighted with a pink oval. Below the header is a navigation menu with links for "About EDD", "Find a Job", "File & Manage a Claim", "Employer Services", and "EDD News". The main content area features a banner for "e-Services for Business" with the text "Manage your employer payroll tax accounts online, 24 hours a day, 7 days a week!" and a "LEARN MORE >" button. The banner also lists services: Register, File, Pay, and Update.

Before we review how to create Participation, let's review some information on CalJOBS activity codes, including where to find information and guidance on each code. To access the current Information Notice on CalJOBS activity codes, go to www.edd.ca.gov and type in WSIN17-09 in the top search bar.

Where to find CalJOBS Activity Codes



INFORMATION NOTICE

Date: September 29, 2017 Number: **WSIN17-09**
Expiration Date: 10/29/2019



CalJOBS™ ACTIVITY CODES

The CalJOBS Activity Codes will be revised effective October 2, 2017. The Department of Labor (DOL) issued additional *Workforce Innovation and Opportunity Act (WIOA)* performance reporting guidance that created a need for a revised list of activity codes. The use of activity codes has a direct relationship to performance measures and should be evaluated closely. Staff should familiarize themselves with the following attachments to ensure accurate use of CalJOBS activity codes.

Attachments are available on the internet:

1. [CalJOBS Activity Codes – Explanation of Attachments](#)
2. [CalJOBS Activity Codes Dictionary](#)
3. [CalJOBS Activity Codes Detailed Listing – Individual](#)
4. [CalJOBS Activity Codes Detailed Listed – Employer](#)
5. [Errata Chronology](#)

Within this document, there are multiple attachments that provide information about the activity codes in CalJOBS, including the Dictionary and Detailed Listing.

CalJOBS Activity Codes Dictionary

090	Self-Service Skills Self-Assessment This activity is system generated when an individual completes a CalJOBS self-assessment tool designed to inform and educate him/her about his/her employment strengths and weaknesses.
101	Orientation An individual attended an orientation informing him/her of the information and services available through the AJCC delivery system. This includes, but is not limited to, Veteran Orientation, WIOA Orientation, and Local Office Orientation.
102	Initial Assessment AJCC staff conducted an initial assessment of a participant's skill level, aptitude, abilities, interests, and supportive service needs.

45

The Activity Codes Dictionary provides a description of each activity code.

CalJOBSSM Activity Codes Detailed Listing – Individual

#	Activity Code Name	Program Affiliation						Reporting Category	Restart Exit Clock?	PIRL	Duration (Days)
		Adult/ DW	Youth	WP	JVSG	MSFW	TAA				
110	Attended Rapid Response	x		x		x		Housekeeping	NO	Not Reported	1
112	Job Fair	x		x		x		Basic Career Service (Self-Service Information-Only Activity)	NO	1100	1
114	Job Referral: Federal Contractor Job Listing (FCIL)	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1109, 1218	1
115	Resume Preparation Assistance	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1104, 1214, 1322	90
117	UI General Information	x		x				Basic Career Service (Self-Service Information-Only Activity)	NO	1100	1
118	UI Claims Assistance	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1112	1
119	Financial Aid Assistance	x		x	x	x		Basic Career Service (Self-Service Workforce Information Service)	NO	1113	1
120	Use of AJCC Resource Room	x		x				Basic Career Service (Self-Service Information-Only Activity)	NO	1100	1
121	Job Referral: Job Outside CalJOBS (non-Federal)	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1105, 1215	1
122	Job Referral: Federal	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1108, 1217	1

The Activity Codes Detailed Listing- Individual provides information about the activity code, including the program affiliation and reporting category.

Adding Subsequent Activities

The screenshot shows a software interface with a ribbon at the top labeled "Activities / Enrollments / Services". On the ribbon, the link "Create Activity / Service / Enrollment" is circled in pink. Below the ribbon is a search bar and a table with the following data:

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	101 - Orientation Local Provider	W	Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

Below the table, there are navigation controls including "Page 1" and "Rows 10".

To enter another activity code, choose the “Create Activity/ Service/ Enrollment” link on the **Activities/Enrollments/Services** ribbon.

General Information	Service Provider
General Information	
Participant User Name:	BRODYBRIDGES
Participant State ID:	31806
Last Name, First Name MI:	Bridges, Brody
Social Security Number:	6868
Address:	555 Sunshine Ln Redding, CA 96001
Application Summary:	Program:WIOA Application Date:2/21/2017 Earliest Eligibility Date:02/21/2017
Participation Date:	02/21/2017
Customer Program Group:	10B - Adult - Individualized Services/Training
LWIA Region:	Your Local Area/Region
Office Location:	Your Organization Office
Agency Code Search:	Click Here
Agency Code:	

After selecting the “Create Activity/ Service/ Enrollment” link you are brought to the first tab- **General Information**.

Be sure to choose the correct **Customer Program Group**, based on your grant/funding stream. The **LWIA Region** will be your LWIA Region. **Office Location** will be your office/agency name.

If your Area uses Agency Codes, the code can be entered by selecting the Click Here link.

The screenshot shows a web form with the following fields and values:

- Grant:** None Selected
- WIOA Title II Partner Program:** Yes, service is a WIOA Title II Partner Program.
- * Activity Code:** 328 Occupational Skills Training - Non Approv Provider (No 1). A link "Select Activity Code" is highlighted with a pink oval.
- Projected Begin Date:** [Empty] Today
- Actual Begin Date:** 02/23/2017 Today (highlighted with a pink arrow)
- * Projected End Date:** 06/15/2017 Today (highlighted with a pink arrow)
- Any classes attended through Distance Learning:** Yes No
- Participant has been issued an ITA and the ITA will pay for this service:** None Selected

Still within the **General Information** tab, scroll down to **Enrollment Information**.

To select an **Activity Code**, use the link titled "[Select Activity Code](#)." This will generate a pop-up box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the Activity Code box. For training purposes today, we chose "328 Occupational Skills Training." You will enter whichever activity code is appropriate for the services you provide.

Next, enter an **Actual Begin Date**. You may choose the "[Today](#)" link to populate today's date, click on the picture of a calendar to populate a calendar for which to choose the date, or manually enter the date into the box.

Note: If you choose to use a **Projected Begin Date**, you must remember to go back into the system and add an **Actual Begin Date** when the activity begins. It is always preferred to use Actual Begin Dates.

Finally, enter the **Projected End Date**.

General Information

Service Provider

Staff Information

Staff ID: 30532206

Position: Staff

Current Case Manager:

Previous Case Manager:

Comments:

Case Notes:

ID	Create Date	Subject	Action
No data found.			

Case currently Not Assigned to a Case Manager

[Assign Case Manager](#)

[Assign Me](#)

[Remove Case Manager Assignment](#)

Next >>

Exit Wizard

50

Finally, **Staff Information** is where you can assign a case manager, enter a comment, or create a case note. Be sure to select “Next” to save information and move on.

General Information | **Service Provider**

Enrollment Service Provider Information

Enrollment Summary: Enrollment ID: 2796674
 Username: BRODYBRIDGES
 WIOA Application ID: 2238703
 Activity Code: 328
 Activity Dates: 2/23/2017 - 8/8/2017

• **Provider:** GSI Technical Career Institute
[\[Select Provider \]](#)

• **Service, Course or Contract:** Culinary Arts/Chef Training
[\[Select Service, Course or Contract \]](#)

Provider Locations: GSI Technical Career Institute
 3597 Cullington Rd
 Sacramento, CA 94204
[\[Select Provider Locations \]](#)

Provider Contacts: Larry White
[\[Select Provider Contacts \]](#)

• **Occupational Training Code:** 35101100 - Chefs and Head Cooks
[\[Occupational Training Code \]](#)

<< Back | **Next >>**

51

Next, on the **Service Provider** tab, you must complete the **Enrollment Service Provider Information**. If you are completing a training activity code, such as in our example, you must select the provider who will provide the training by selecting the “Select Provider” link. This will generate a pop-up box with list of providers to choose from. Select the appropriate provider name, and your choice will fill in the **Provider** box.

Then select the link, “Select Service, Course or Contract”. Again, this will generate a pop-up box with a list of Service, Course or Contract associated with that Provider. Select the appropriate Service, Course or Contract Name and your choice will fill in the appropriate box.

The **Provider Locations** and **Provider Contacts** will auto-populate.

Finally, the **Occupational Training Code** may auto-populate. If it doesn't select the “Occupational Training Code” link to choose the appropriate Occupational Training code.

Once all fields are complete, select “Next”.

Enrollment Summary:

Enrollment ID: 2796670
 Username: BRODYBRIDGES
 WIOA Application ID: 2238703
 Activity Code: 101
 Activity Dates: 2/21/2017 - 2/21/2017

Last Activity Date: Today

Completion Code:

Case Notes: [Add a new Case Note](#) [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

<< Back Finish Delete

If you are creating a training activity code, you will be brought to the **Enrollment Cost** tab after selecting “Next” on the previous slide. For our training purposes we will not review the **Enrollment Cost**, **Financial Aid**, **Enrollment Budget**, or **Budget Planning** tabs.

We will resume our training on the **Closure Information** tab. If you wish, select the “Add a New Case Note” link and enter information about the completion of this activity. If you do not want to create a new case note associated with this activity, and you do not wish to close the activity at this time do not enter **Last Activity Date** or **Completion Code**. Instead select “Finish”.

If you do wish to close the activity, enter a **Last Activity Date** and then choose the **Completion Code** from the drop down menu. Then, select “Finish”.

To create a case note, select the “Add a new Case Note” link.

Creating a Case Note

Case Note Template

Autofill by Templater: None Selected

Case Note Summary

Case Note ID: 0
Username: BRODYBRIDGES
User ID: 32800
Name: Brody Bridges

Case Note Details

Please check to suppress this Case Note

* Contact Date: Today

Type ID: 2760672 Delete

* LWIA/Region: None Selected

* Office Location: None Selected

* Program: Title I - Workforce Development

App ID: 2238703 - Active

Partner Program: None Selected

* Subject:

Contact Type: None Selected

* Case Note Description:

To add a Case Note, simply complete the required fields on this page. You may choose a **Case Note Template** (if you see one that meets your needs) by selecting the drop down menu at the top of the page. Otherwise, continue to the next fields.

The **Case Note Summary** information auto-fills.

The **Case Note Details** section must be completed. Enter the **Contact Date** and whether or not you want to suppress the Case Note. A suppressed Case Note means that the note will not be visible to others, just you.

Choose the **LWIA/Region** as WIOA Statewide Contractor, your organization name under **Office Location**, and WIOA **Program** from the dropdown menu , if not already displayed.

The **App ID** should be auto-filled.

Type in the **Subject** of this Case Note, choose the **Contact Type**, and type a brief note in the **Case Note Description**.

Note: It may be very beneficial for you to use a consistent naming convention for the subject of your case notes. For example, writing the number of the activity code the case note corresponds to (in our example, 328). This will be very helpful when running a case note report.

Case Note

The screenshot shows a web form titled "Case Note" with a light blue background. The form is divided into several sections:

- Message Options:** Contains a checked checkbox labeled "Create Message From Case Note on Save".
- Delivery Method:** Includes a "Select Method:" section with four options: "Internal Message (Message Center)" (checked), "Email (If Available)", "Text Message (If Available)", and "Text Message Notification (If Available)". Below these is an unchecked option "Use Recipient's Preferred Notification Method".
- Request Read Receipt:** Features radio buttons for "Yes" and "No", with "No" selected.
- Case Note Attachment(s):** Contains a message: "Listed below are the documents associated with this case note. Click the View link below to view that particular item." Below this is a grey box with the text "No records found". A red warning message follows: "Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with _ when saving the document in our system." At the bottom of this section are two links: "[Add a Document | Scan a Document]".

At the bottom of the form, there are two buttons: "Save" (highlighted with a pink circle) and "Cancel".

54

You may choose to create a message from this case note by marking the **Create Message from Case Note on Save** checkbox. To demonstrate this, we have selected the box as an example. If you do not wish to create a message from this Case Note, do not check the box.

The system will allow you to scan or upload a document to be associated with this note if you need to do so. This may be done by selecting either the "Add a Document" or "Scan a Document" link.

When the Note is complete, select the "Save" button.

The screenshot shows a web application interface with a top navigation bar containing five tabs: "Enrollment Cost", "Financial Aid", "Enrollment Budget", "Budget Planning", and "Closure Information". The "Closure Information" tab is selected and highlighted with a pink border. Below the navigation bar, the "Closure Information" section is displayed. It includes an "Enrollment Summary" with the following details: Enrollment ID: 2796670, Username: BRODYBRIDGES, WIOA Application ID: 2238703, Activity Code: 101, and Activity Dates: 2/21/2017 - 2/21/2017. There are also input fields for "Last Activity Date" (with a "Today" button) and "Completion Code" (with a dropdown menu set to "None Selected"). Below these fields is a "Case Notes" section with a table. The table has columns for "ID", "Create Date", "Subject", and "Action". A single row is visible with the following data: ID: 41479, Create Date: 02/23/2017, Subject: 328 Training Activity Code, and Action: Edit. The table is highlighted with a pink border. At the bottom right of the interface, there are three buttons: "<< Back", "Finish", and "Delete". The "Finish" button is highlighted with a pink border. The page number "55" is located in the bottom right corner.

Enrollment Cost Financial Aid Enrollment Budget Budget Planning **Closure Information**

Closure Information

Enrollment Summary:

Enrollment ID: 2796670
Username: BRODYBRIDGES
WIOA Application ID: 2238703
Activity Code: 101
Activity Dates: 2/21/2017 - 2/21/2017

Last Activity Date: Today

Completion Code:

Case Notes:

ID	Create Date	Subject	Action
41479	02/23/2017	328 Training Activity Code	Edit

<< Page 1 of 1 >> Rows: 100

<< Back **Finish** Delete

55

Note the added Case Note in the **Case Notes** table.

To finish adding this activity, select the “Finish” button.

Activities / Enrollments / Services 2

Create Activity / Service / Enrollment

Search

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute		Adult	N/A	02/23/2017	08/08/2017	Close
	101 - Orientation Local Provider		Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

Page 1 of 1 Rows 10

Measurable Skills Gain 0

Activity Status:  = Open,  = Closed,  = System Closed,  = Voided

56

You will find the added activity on the activity table in your **Activities/Enrollments/Services** ribbon.

The Activity Status in the Status column will reflect whether the activity is open or closed. There is a legend at the bottom of the screen that explains the different status icons.

Closing Activities

Closing an Activity

The screenshot shows a web interface for managing activities. At the top, there is a ribbon labeled 'Activities / Enrollments / Services' with a '2' in the top right corner. Below the ribbon is a search bar and a 'Create Activity / Service / Enrollment' link. The main content is a table with the following columns: Status, Activity / Provider, WZ, Funding / Grant, Projected Begin Date, Actual Begin Date, Projected End Date, and Actual End Date. The first row has a green status icon, a description '328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute', a purple WZ icon, 'Adult' funding, 'N/A' projected begin date, '02/23/2017' actual begin date, '08/08/2017' projected end date, and a 'Close' link circled in pink. The second row has a yellow status icon, '101 - Orientation Local Provider', a purple WZ icon, 'Adult' funding, 'N/A' projected begin date, '02/21/2017' actual begin date, '02/21/2017' projected end date, and '02/21/2017 Successful Completion' actual end date. At the bottom of the table, there are navigation controls for 'Page 1' and 'Rows 10'.

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute		Adult	N/A	02/23/2017	08/08/2017	Close
	101 - Orientation Local Provider		Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

To indicate that you have completed providing a service to an individual, you will close that particular activity. To close an activity, expand the **Activities/Enrollments/Services** ribbon. This will bring you to your activity table. Select the “Close” link in the far right column for the activity you wish to close.

Closure Information

Enrollment Summary: Enrollment ID: 2796674
Username: BRODYBRIDGES
WIOA Application ID: 2238703
Activity Code: 328
Activity Dates: 2/23/2017 - 8/8/2017

Last Activity Date: 02/23/2017 Today

Completion Code: Successful Completion

Case Notes: [Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
41479	02/23/2017	328 Training Activity Code	Edit

Page 1 of 1 Rows: 100

<< Back Finish Delete

Select the **Last Activity Date**.

Select **Completion Code** from the dropdown menu. Your options for completion are shown in this slide.

Select the "Finish" button.

Closed Activities

Activities / Enrollments / Services 2

Create Activity / Service / Enrollment

Search

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute		Adult	N/A	02/23/2017	08/08/2017	02/23/2017 Successful Completion
	101 - Orientation Local Provider		Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

60

As a result, you will now see a closed Status. You will also see an end date and the completion result in the **Actual End Date** column.

Objectives Summary

- Created Participation
- Completed an Individual Employment Plan (IEP)
- Added subsequent activities and case notes
- Closed activities

61

In this module, we:

- Created Participation – Once eligibility is established through the application, create participation to enroll the individual into the program.
- Completed an Individual Employment Plan (IEP).
- Added subsequent activities and case notes – We added activities to track services provided to the individual and learned how to attach a case note to both an activity and the Title I application.
- Closed activities – Finally, we learned how to close activities when we are done providing a services. You really want to track all services provided to these individuals.

Questions



62

For any questions concerning this module, please contact the Capacity Building Unit at CBUTraining@edd.ca.gov.