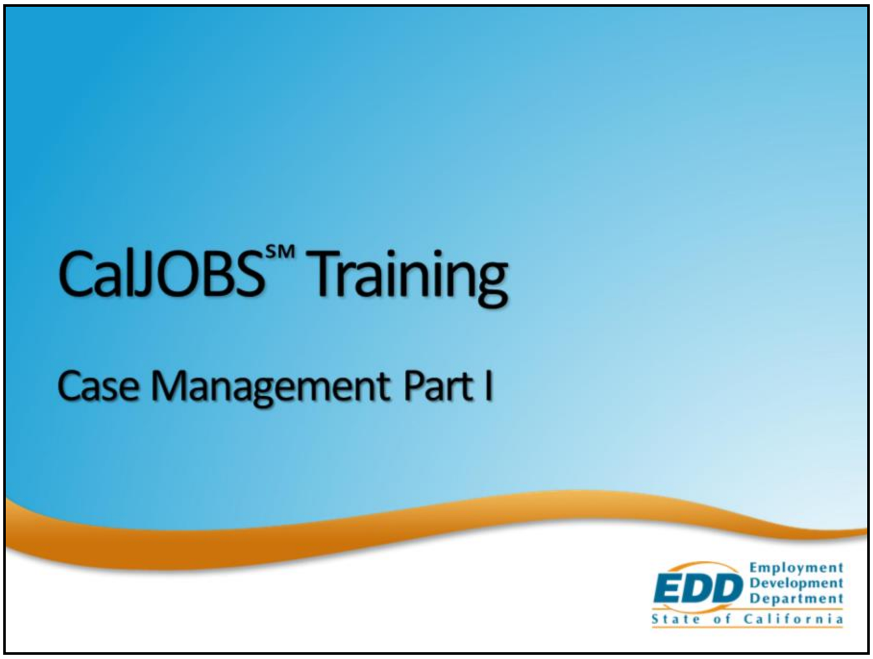


Welcome to CalJOBS Training! In this training, we will learn about the Case Management features in CalJOBS.

In this module, we will:

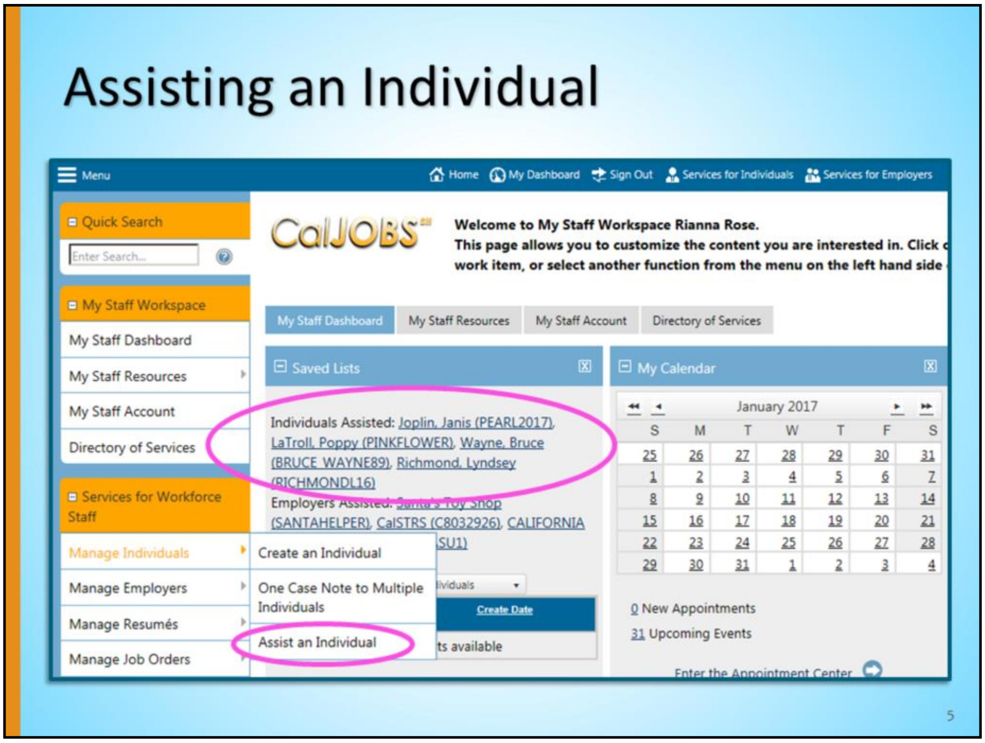
- Create Participation – Once eligibility is established through the application, we create participation to enroll the individual into the program.
- Complete an Individual Employment Plan (IEP).
- Add subsequent activities and case notes – We will learn how to add activities to track services provided 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

3

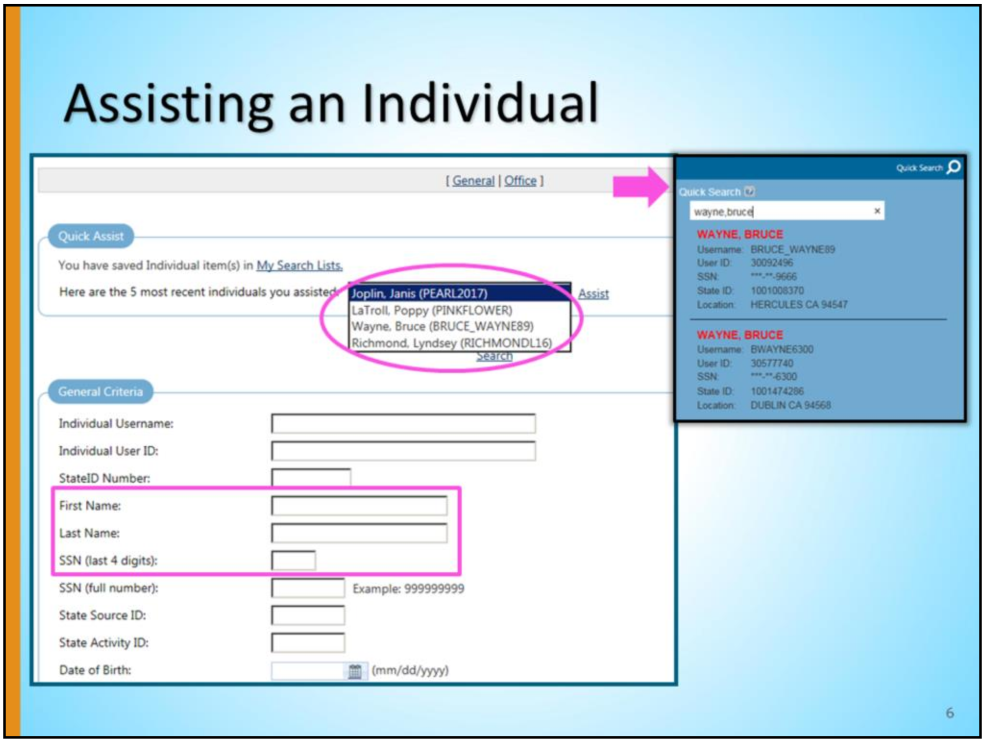
What is Participation?

- 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.



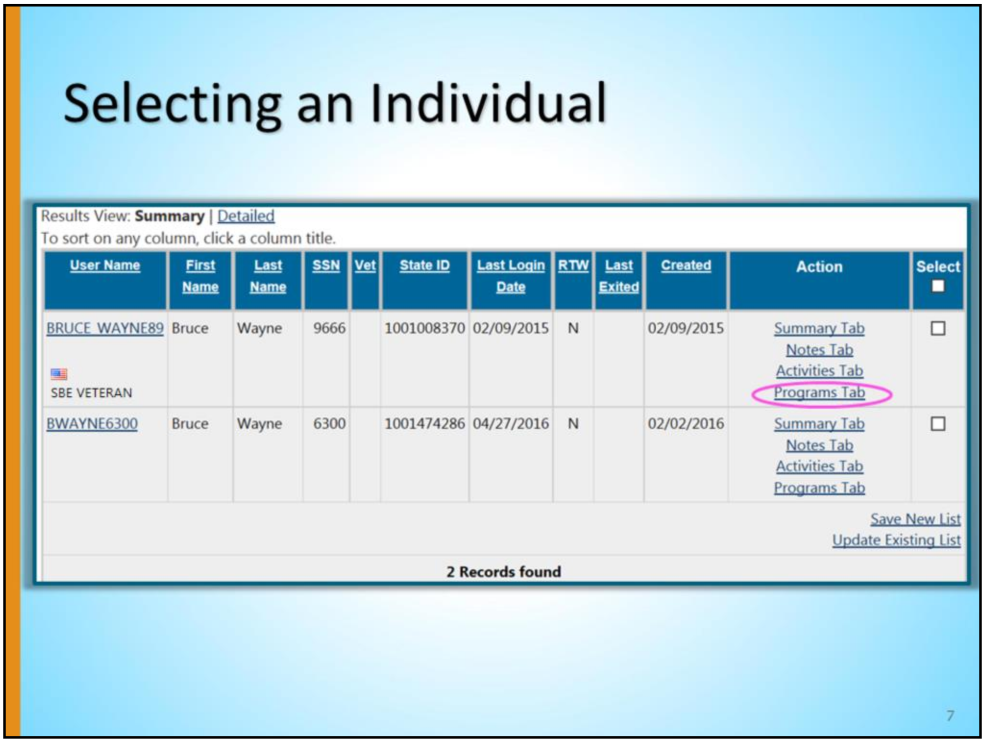
After logging into the system, the first page you will see is **My Staff Dashboard**. On the left navigation menu you will see a gold tab called **Services for Workforce Staff**. In that tab, hover over **Manage Individuals** and select **Assist an Individual** from the flyout menu, as shown in the lower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



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.

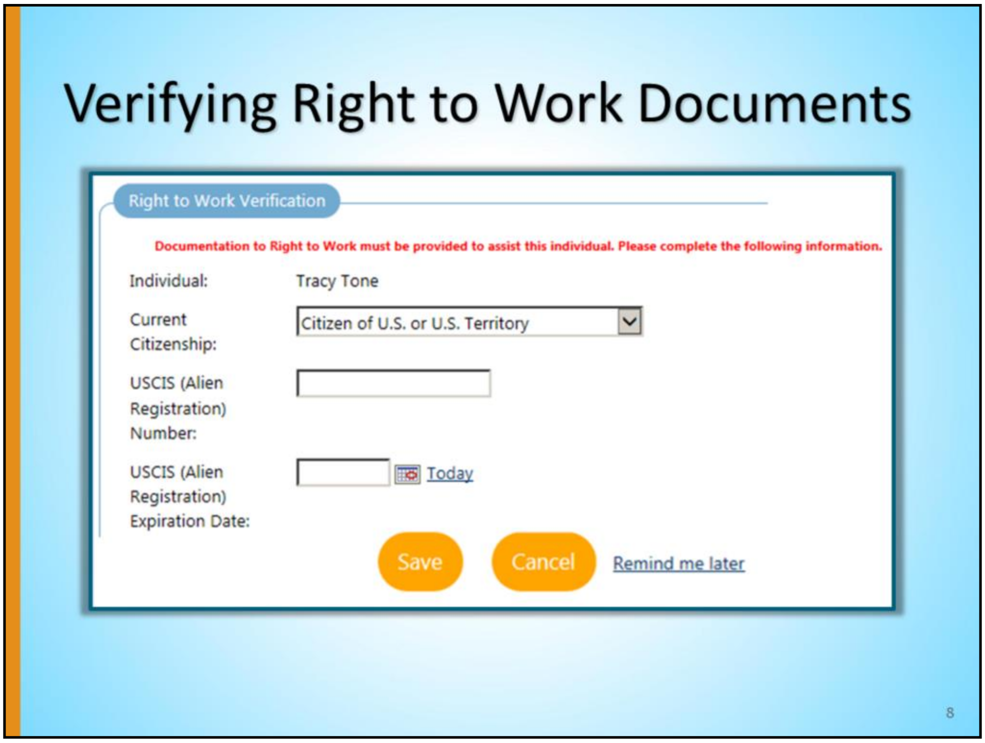
User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	RTW	Last Exited	Created	Action	Select
BRUCE_WAYNE89 SBE VETERAN	Bruce	Wayne	9666		1001008370	02/09/2015	N		02/09/2015	Summary Tab Notes Tab Activities Tab Programs Tab	☐
BWAYNE6300	Bruce	Wayne	6300		1001474286	04/27/2016	N		02/02/2016	Summary Tab Notes Tab Activities Tab Programs Tab	☐

Save New List
Update Existing List

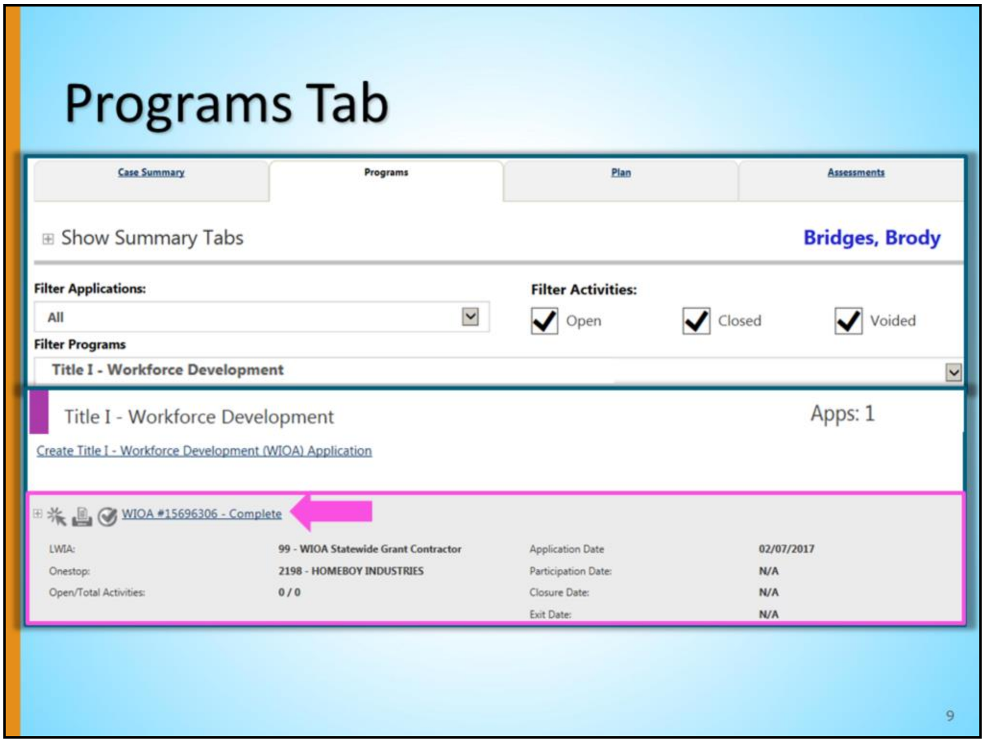
2 Records found

7

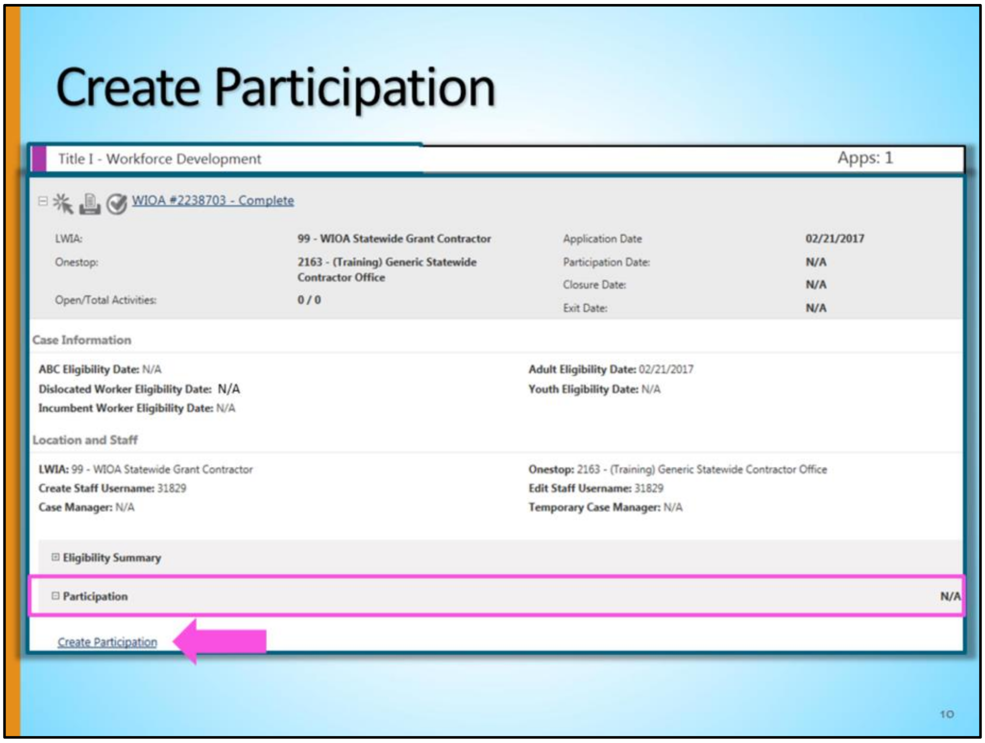
Still, your search results may give you more than one individual user. Find the individual you would like to create a WIOA application for, and select the "Programs Tab" link in the far right Action column.



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



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.

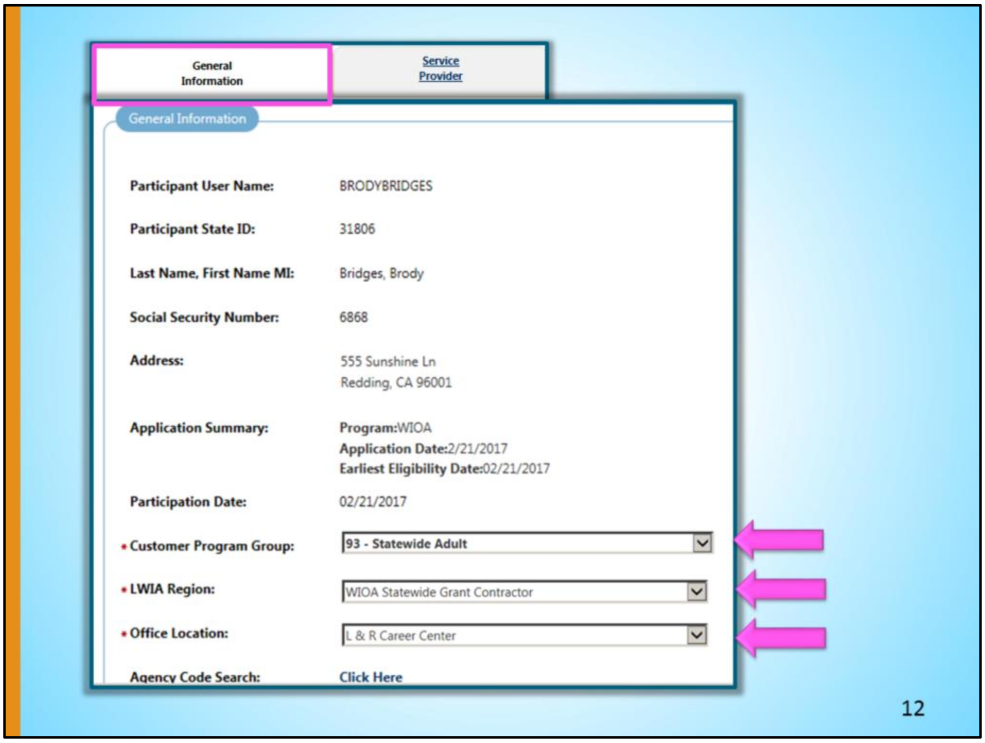


This is what your screen will look like after expanding. Notice a number of light gray "ribbons" that are now present within the application. Select anywhere in the second down, light gray ribbon titled **Participation** (highlighted in pink) to expand the Participation section. Next, select the Create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

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.

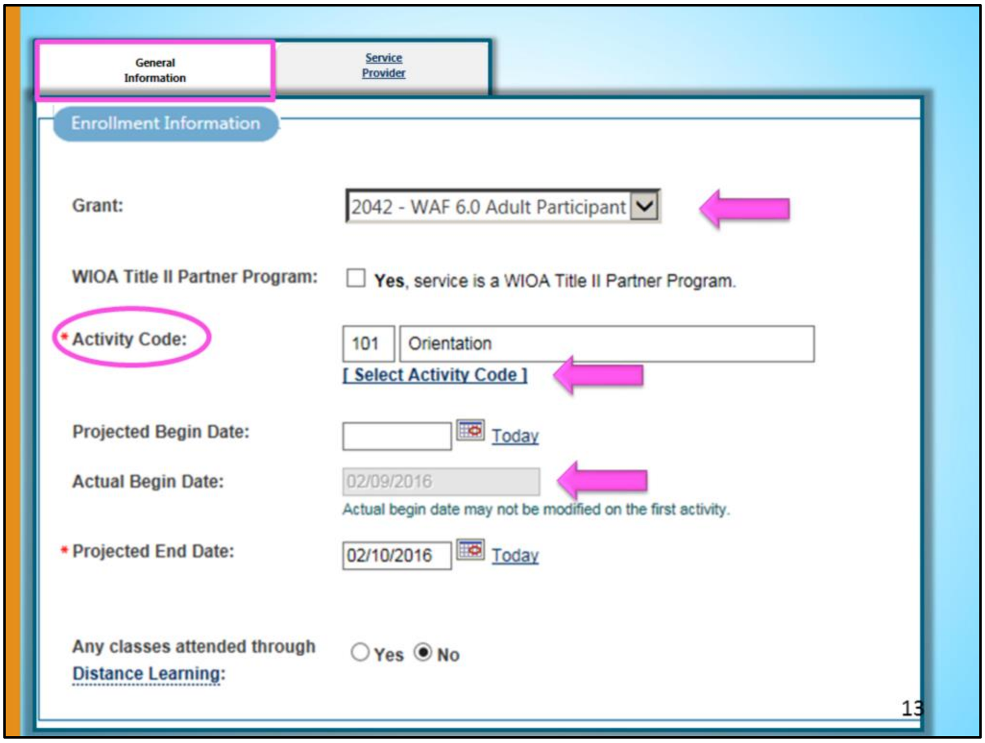
Select the "Next" button to continue.



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.

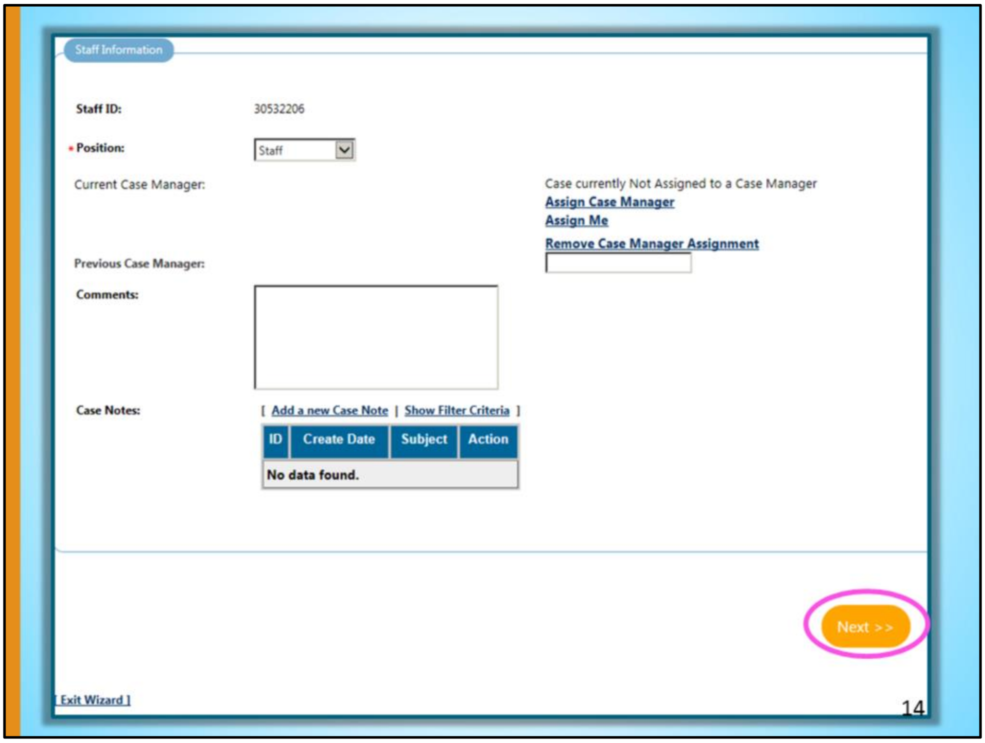


Still within the **General Information** tab, we are now under **Enrollment Information.** If you are serving your individual with a WIOA special grant, select the grant from the **Grant** dropdown. In our example, our individual is not receiving services from a WIOA grant, therefore we are keeping this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

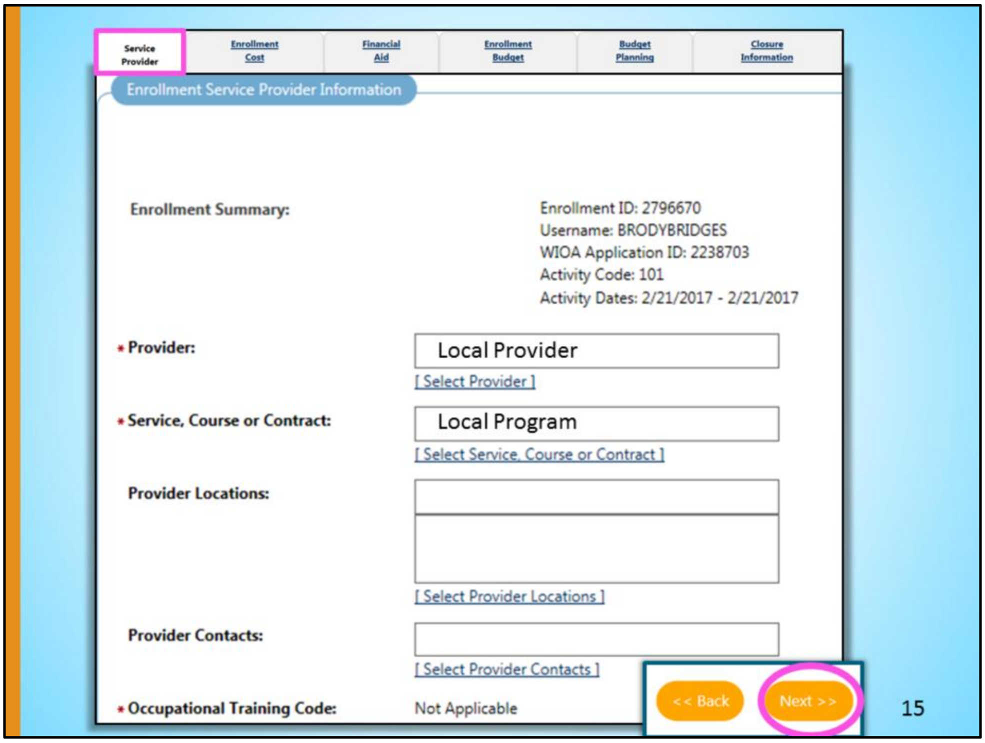
To select an Activity Code, use the link titled "Select Activity Code." This will generate a pop-up box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the **Activity Code** box. For training purposes today, we chose "101 Orientation."

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.



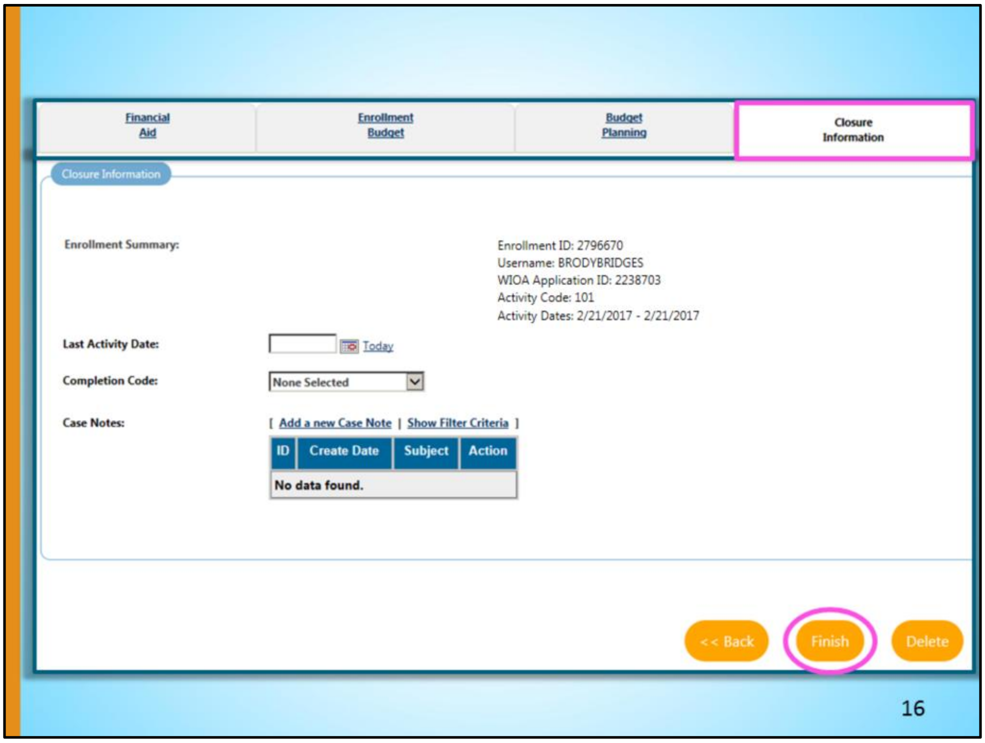
Finally, **Staff Information** is where you can assign a case manager, enter a comment, or create a case note. Be sure to select "Next" to save information and move on.



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.

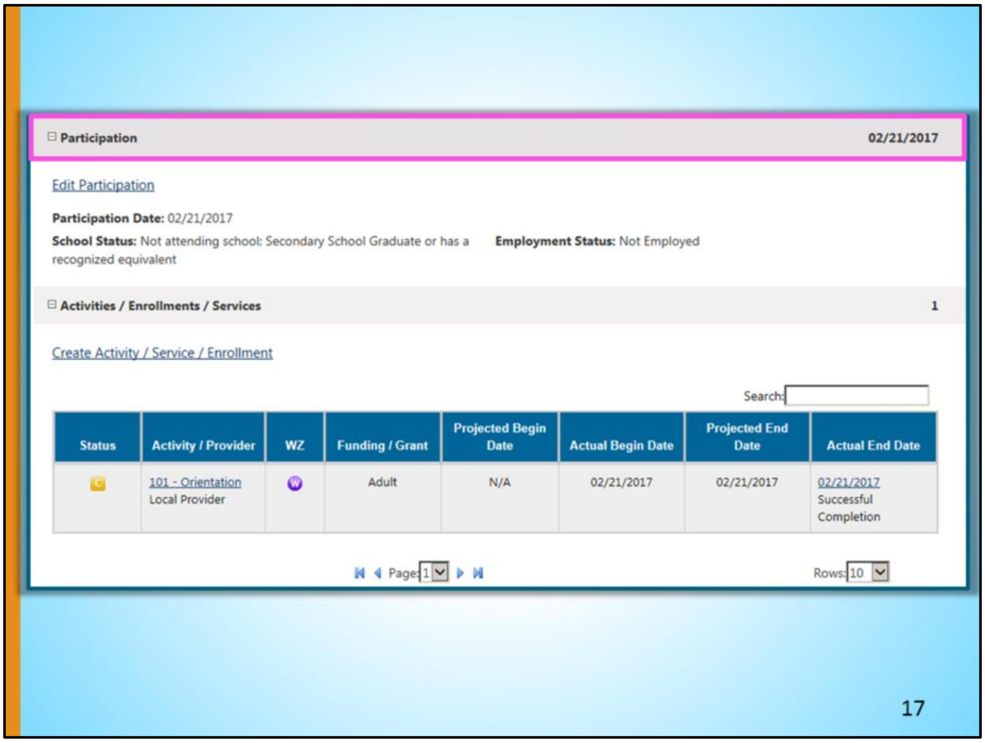
Select the “Next” button to continue.



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 with 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.

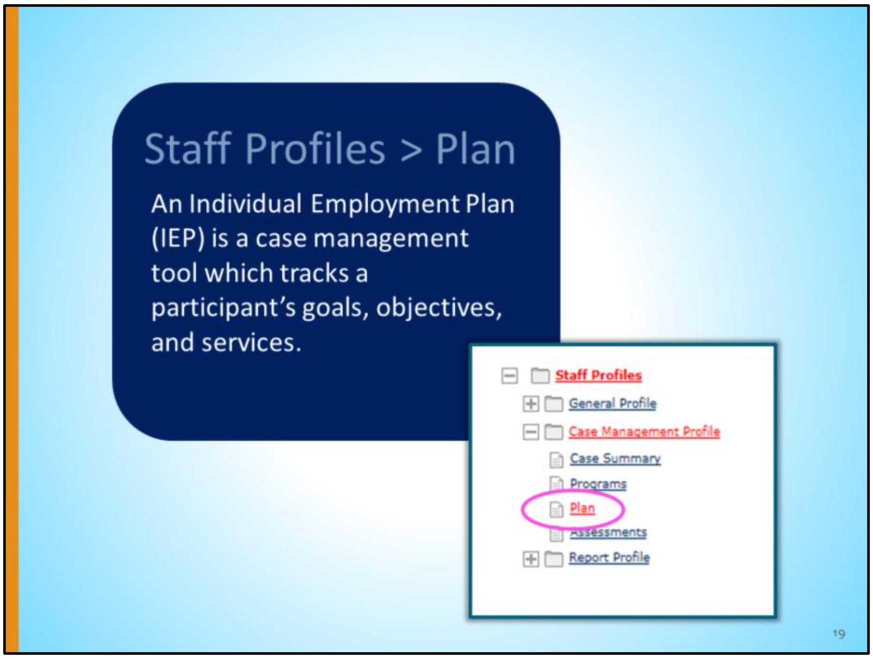


After selecting “Finish”, you will see information on the **Participation** ribbon within the Title I Application, along with the “Edit Participation” link.

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

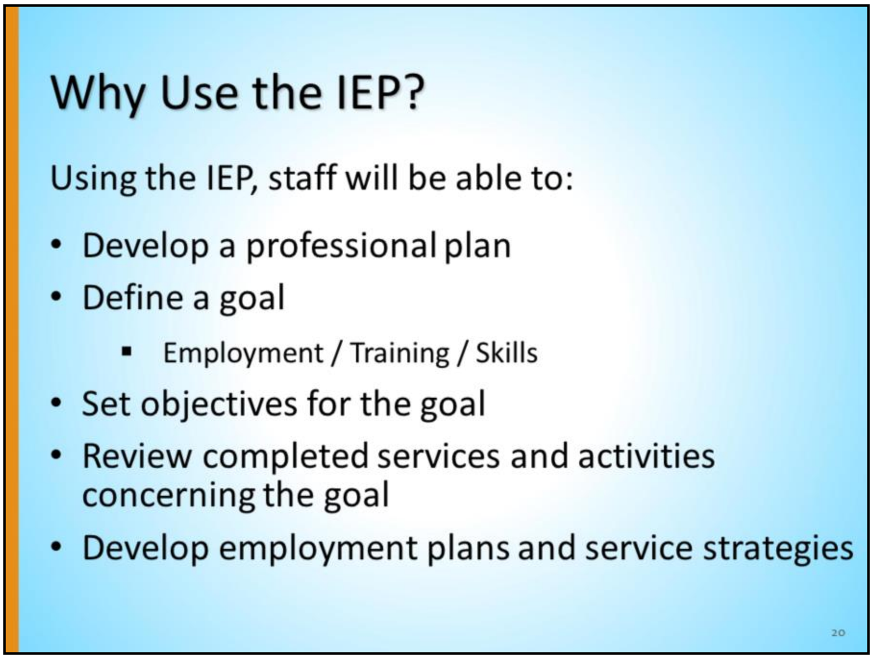
Completing an Individual Employment Plan (IEP)

18



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).

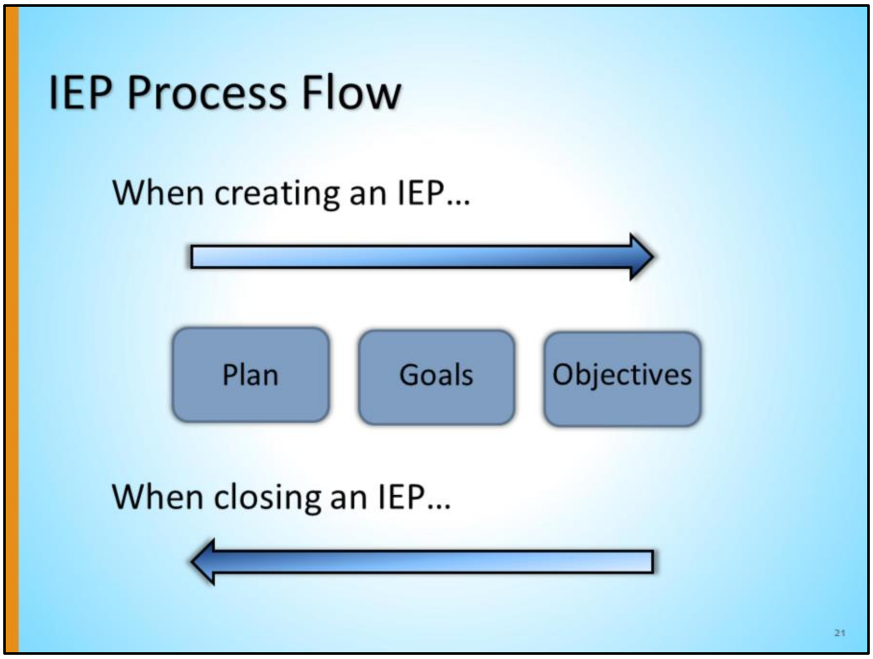
The IEP is located on the Plan link under Staff Profiles >Case Management Profile.



Using the IEP, staff will be able to:

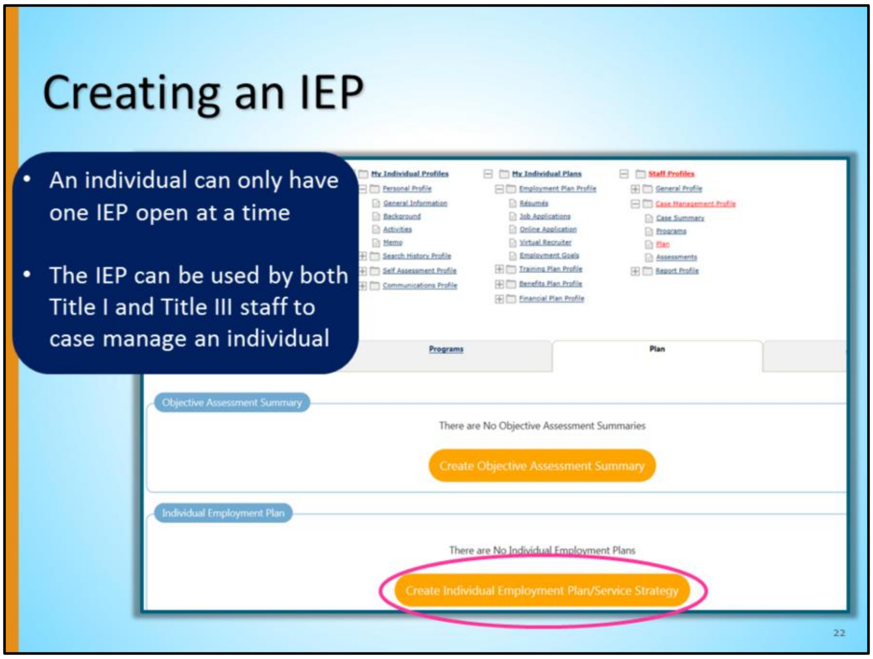
- Develop a professional plan
- Define a goal (Employment / Training / Skills)
- Set objectives of the goal
- Review completed services and activities concerning the goal
- Develop employment plans and services strategies

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.



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

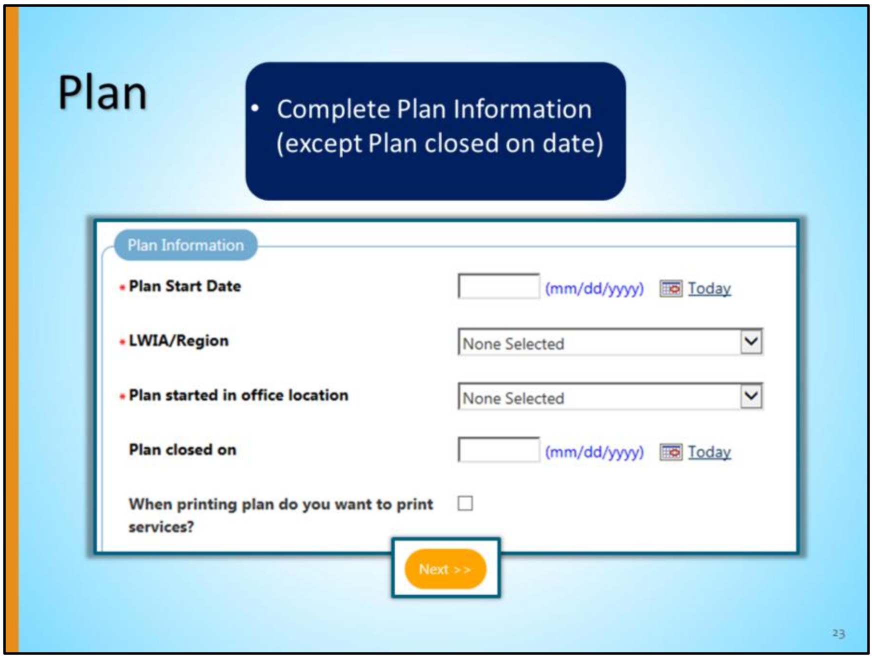
When closing an IEP, start from right to left by closing the objectives, then the goals, and then the plan.



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.

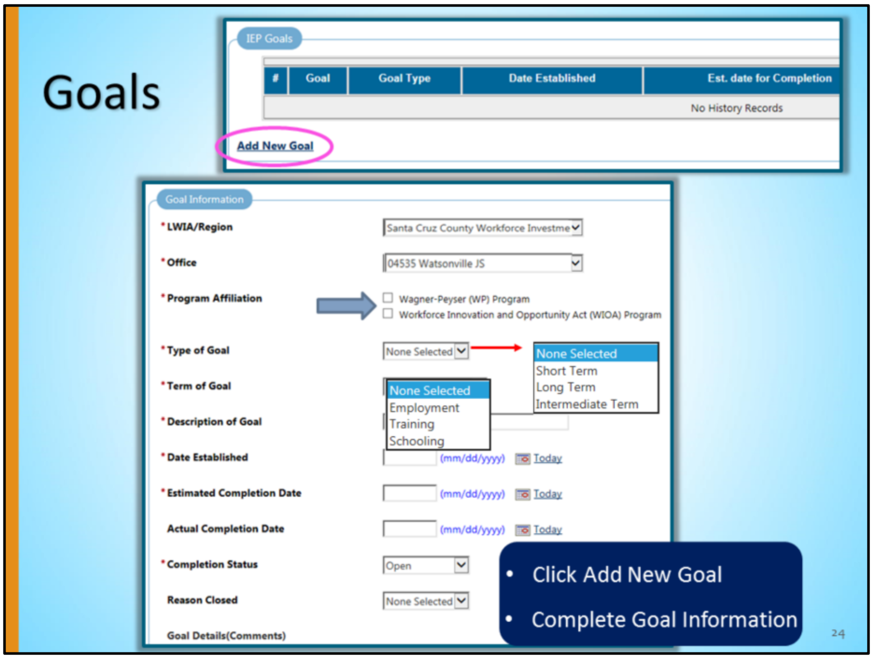


The first tab to appear will be the **Plan** tab. Complete the required **Plan Information** fields.

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.



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

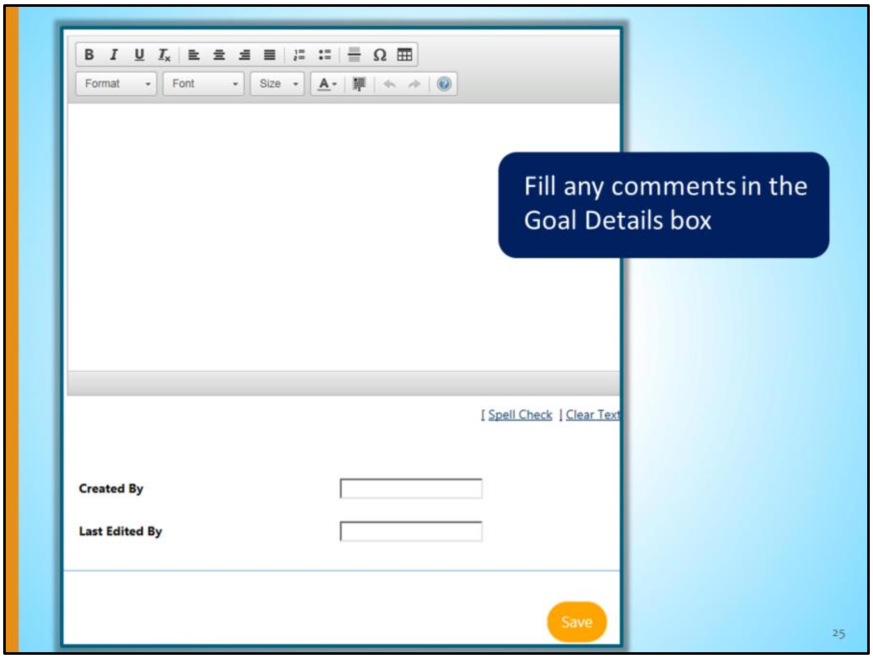
Select the **LWIA/Region** and **Office** that is associated with this goal. Select the associated program for the **Program Affiliation** field. Title I staff will select WIOA Program. Title III staff will select WP Program.

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.

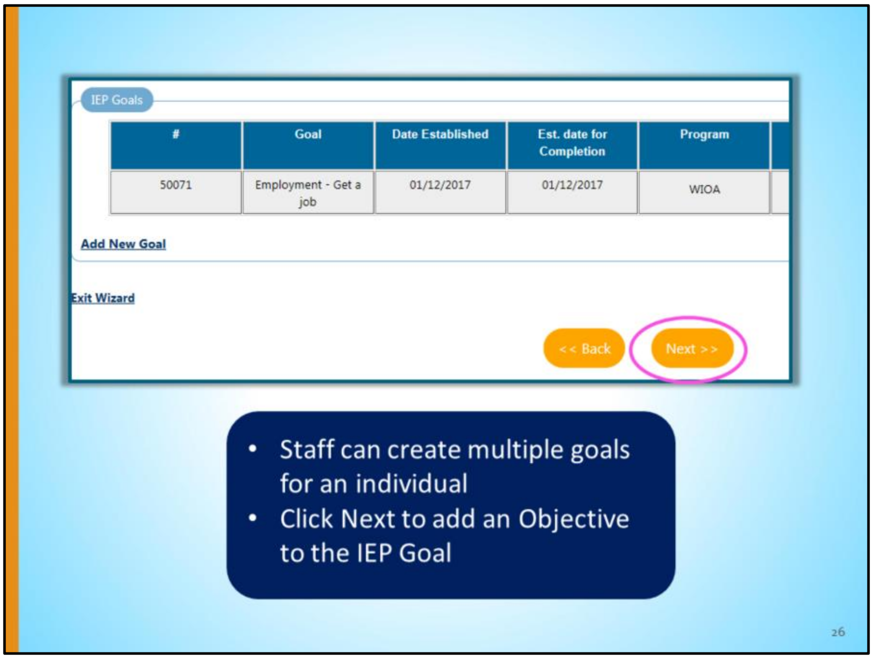
Enter the **Date Established** (when the goal is initiated) and **Estimated Completion Date.**

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



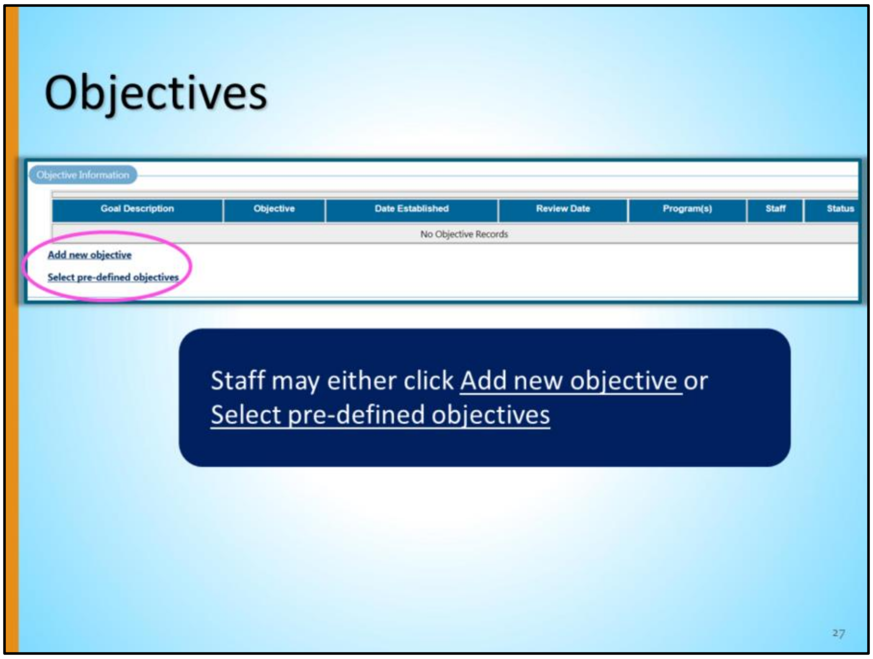
Scrolling down within the **Goal Information** section, type details related to the goal in the **Goal Details** box. Staff should be as descriptive as possible regarding the goal the individual is trying to obtain. For example: Mark is looking to start work in an office environment. He will need typing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

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

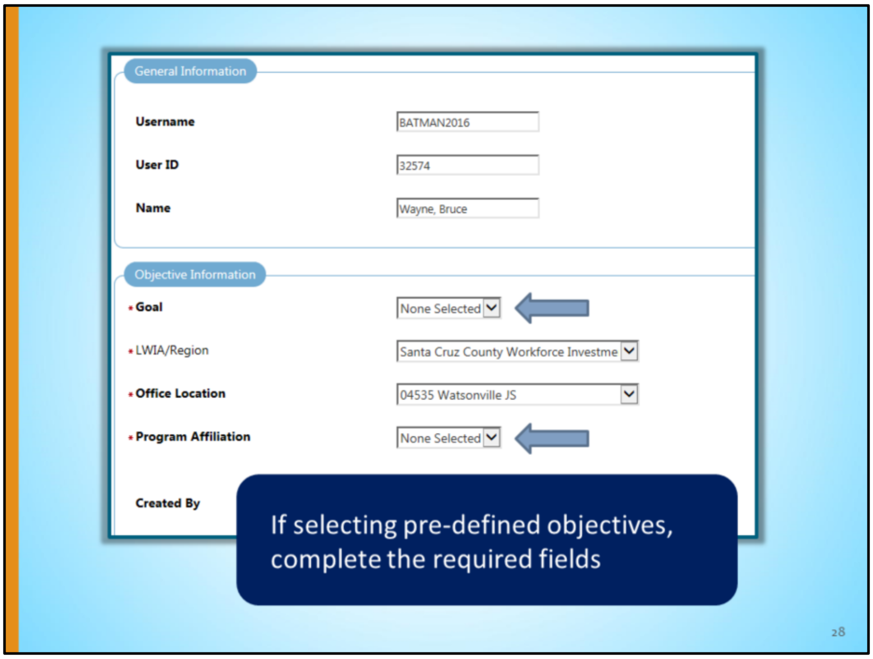


The goal will appear in the **IEP Goals** table. Click the "Next" button to add an objective.

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.



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.

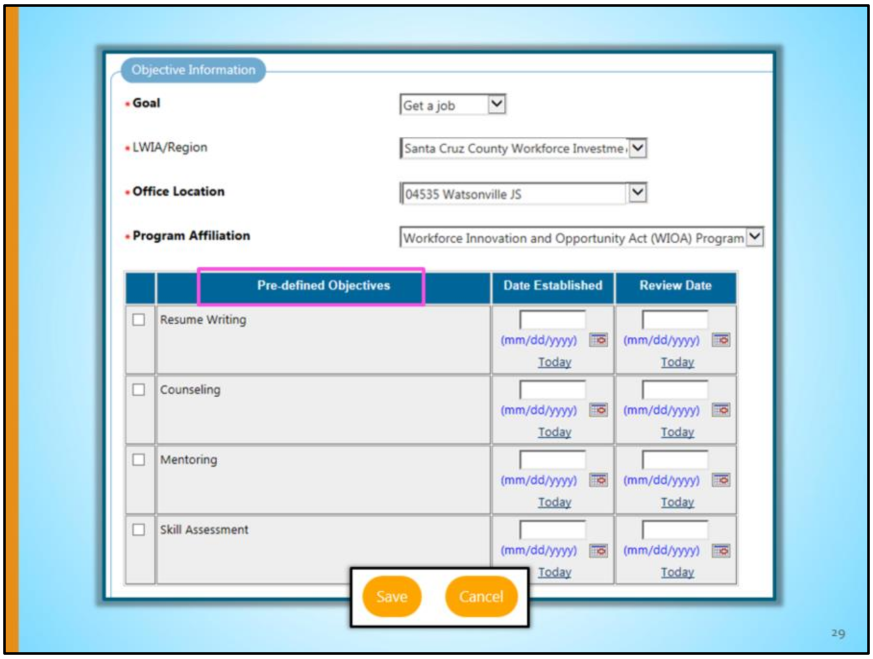


If choosing the <u>Select pre-defined objectives</u> link, complete the required fields.

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

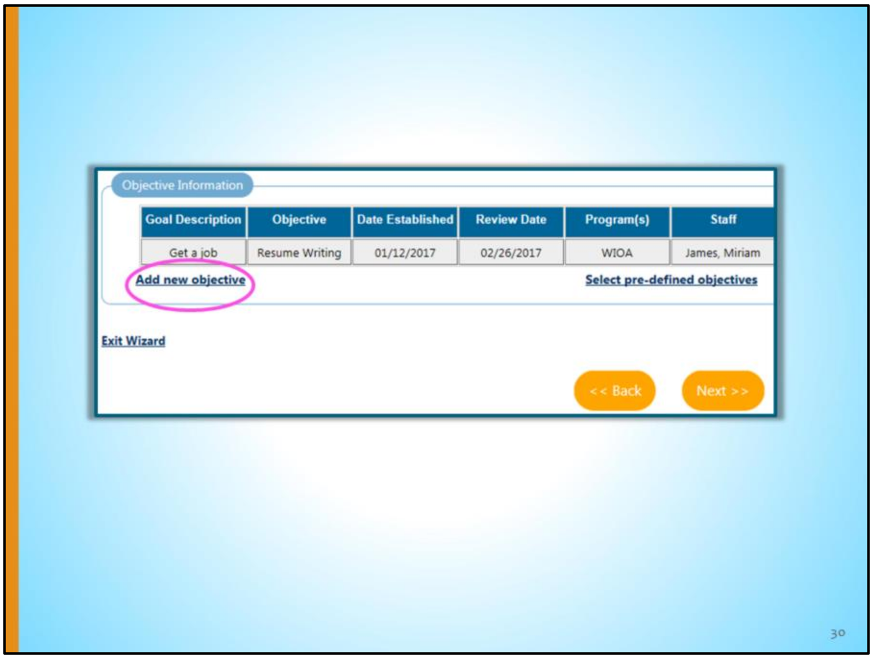
The **LWIA/Region** and **Office Location** may auto-fill.

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).



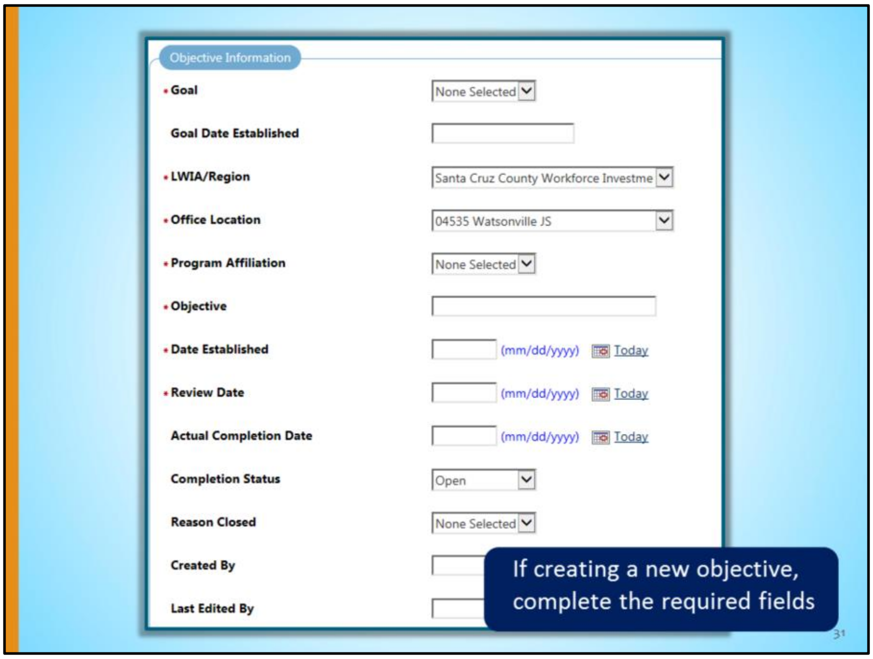
Here are some pre-defined objectives. Select the desired objectives using the checkboxes to the left.

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

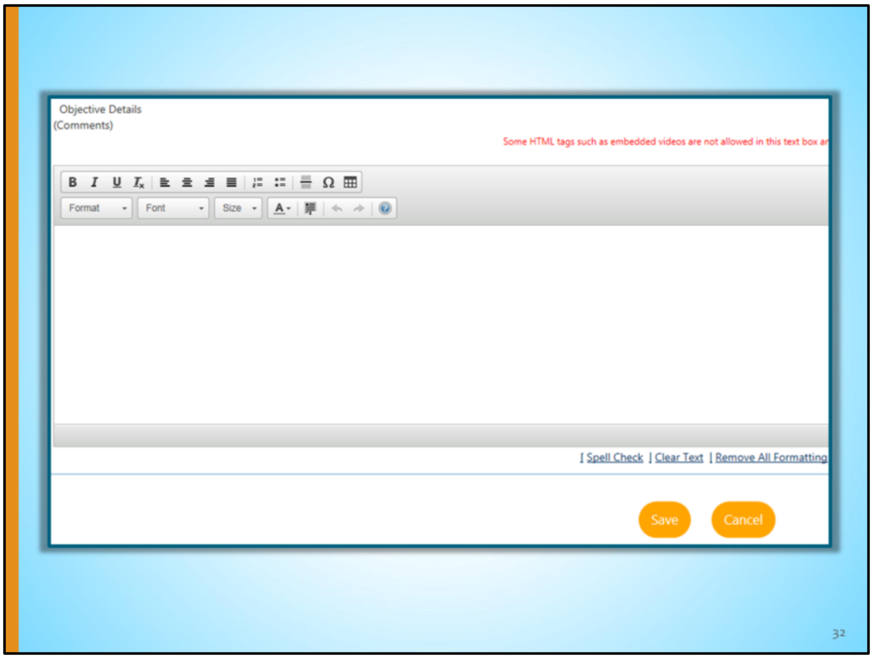


The pre-defined objective now appears in the **Objective Information** table.

To add a new objective instead of a pre-defined objective, click the Add new objective link.

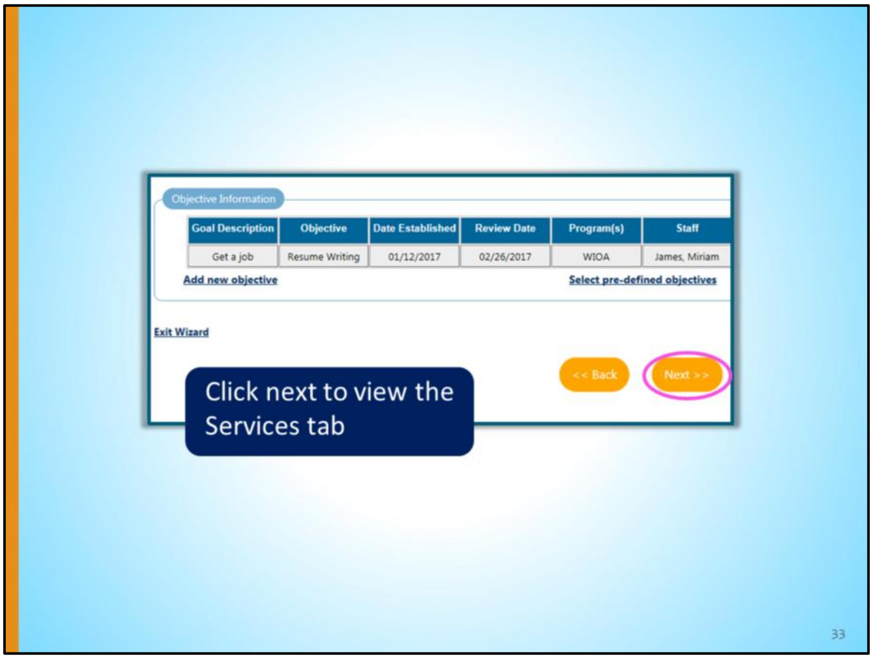


After selecting the Add new objective link, complete the required fields under the **Objective Information** section.



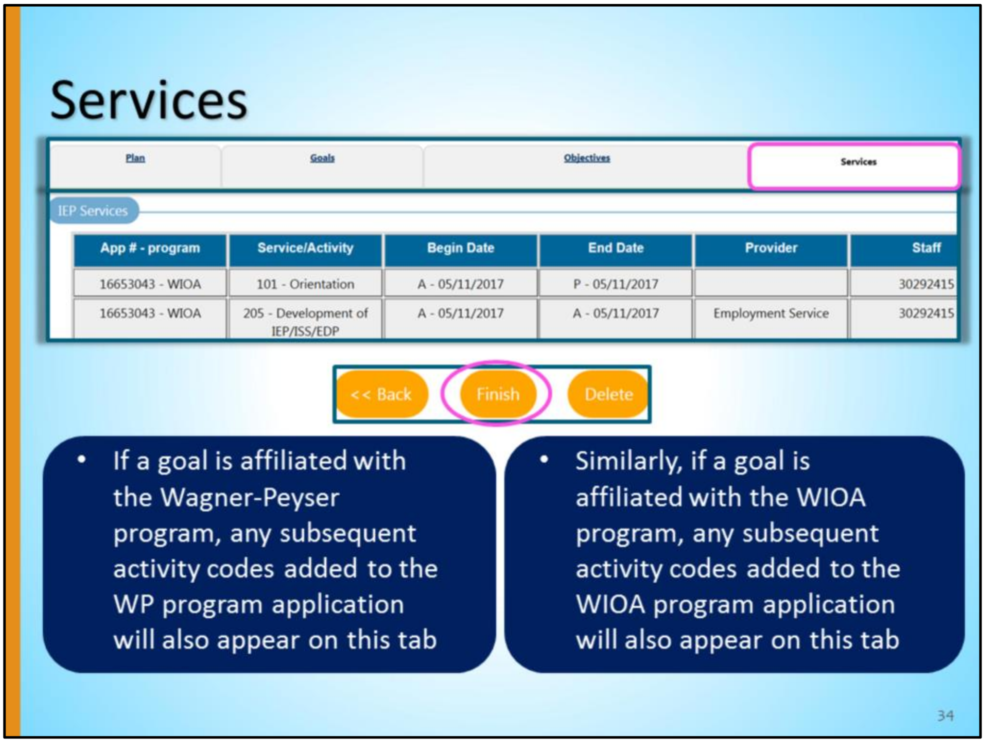
Scrolling down, enter any details or comments in the **Objective Details** section.

Click “Save” to complete this objective.



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

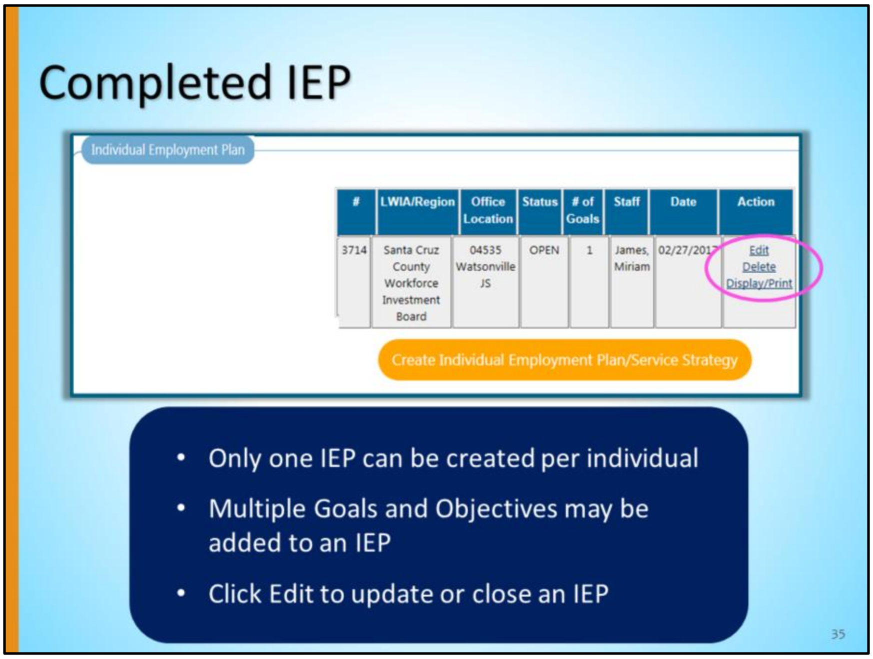
Select "Next" to continue to the **Services** tab.



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

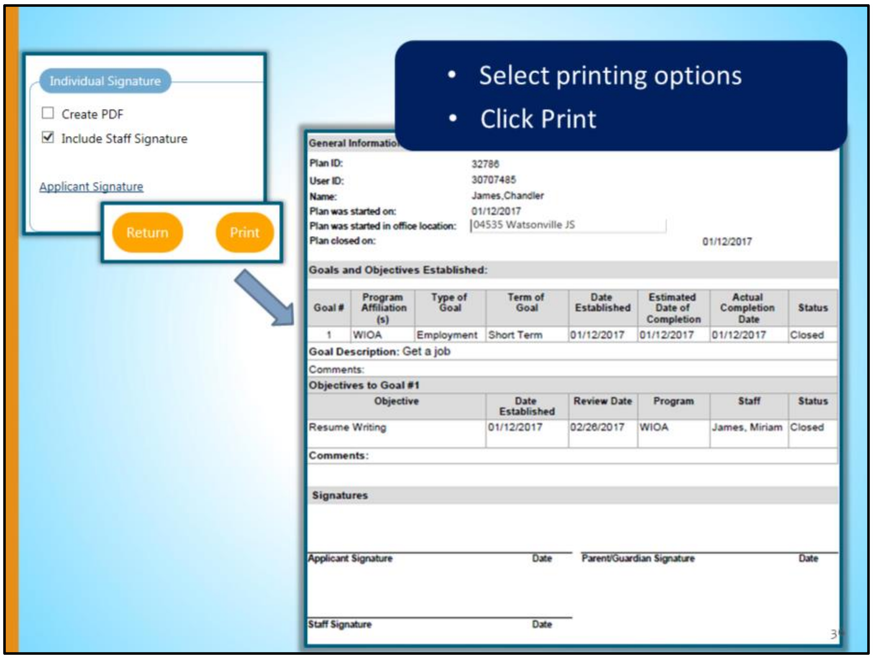
When creating the IEP, the system will automatically create a 205- Development of IEP/ISS/EDP activity code on the **Services** tab. The 205 activity code will also be added to the individual's WP program application if the goal is affiliated with WP. The 205 activity code WILL NOT be automatically added 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.



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.

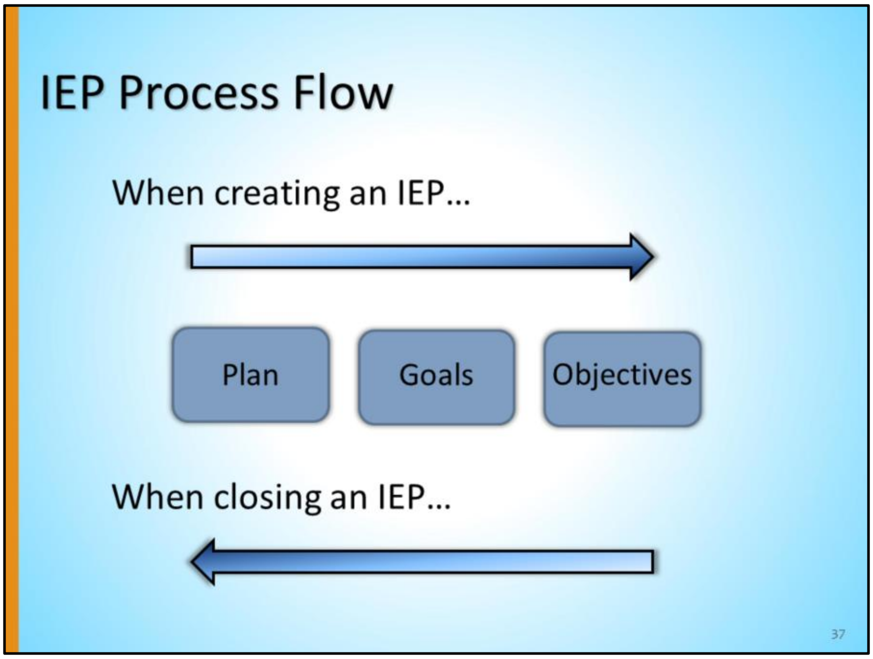
Click the Edit link to edit existing, or add more, goals and objectives, or close an IEP. Click the Display/Print link to view the IEP.



After clicking the <u>Display/Print</u> 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.

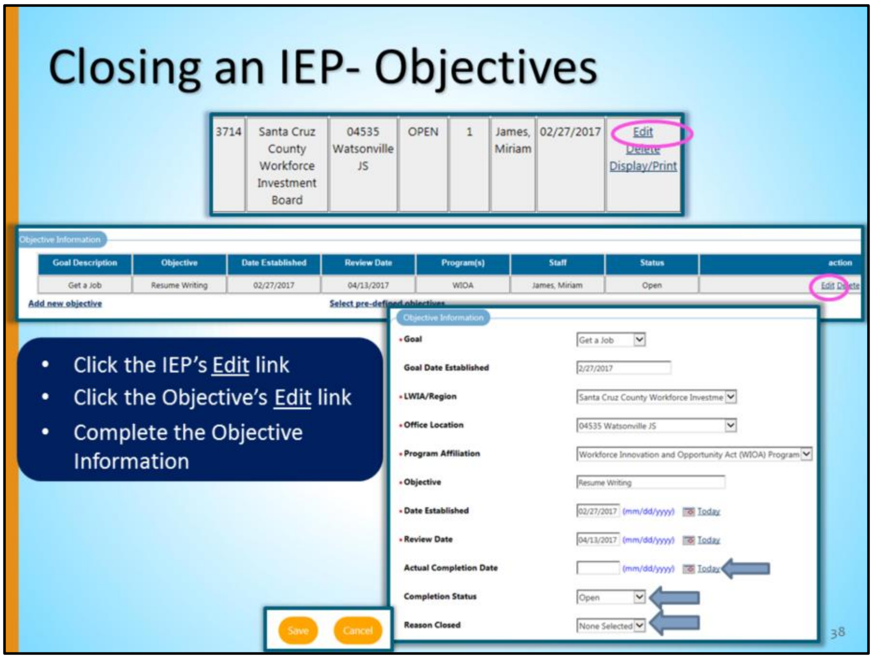
Click the “Print” button. This document will appear in a new window for you to print or save.



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.

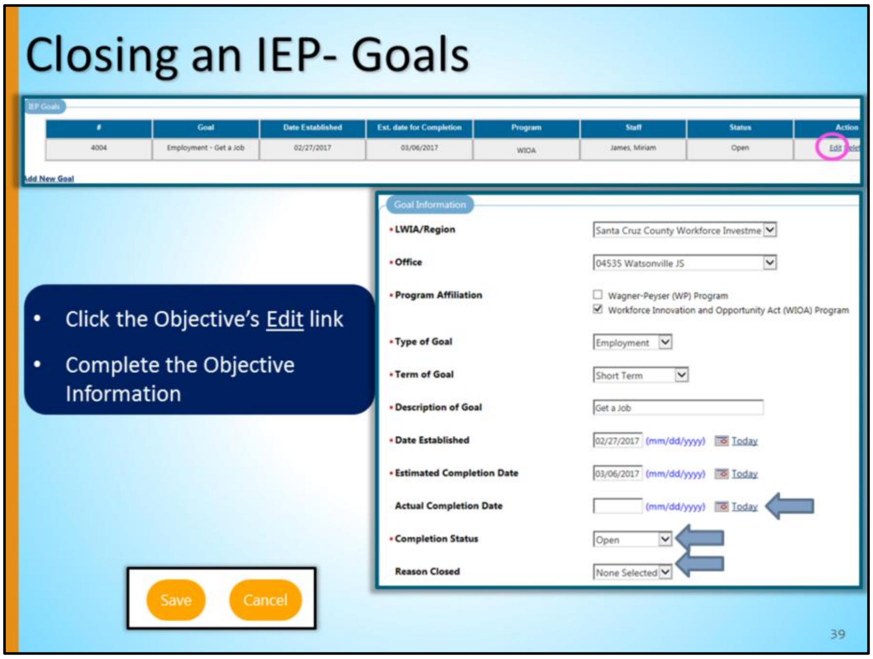


First, click the Edit link within the IEP.

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.

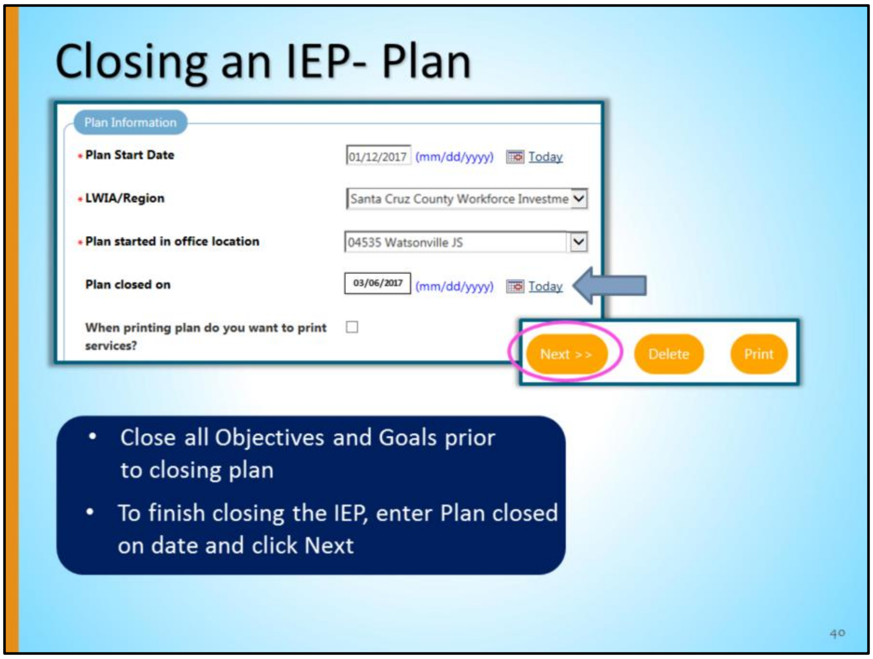
Click “Save.”



Next, go to the **Goals** tab and click the <u>Edit</u> 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.

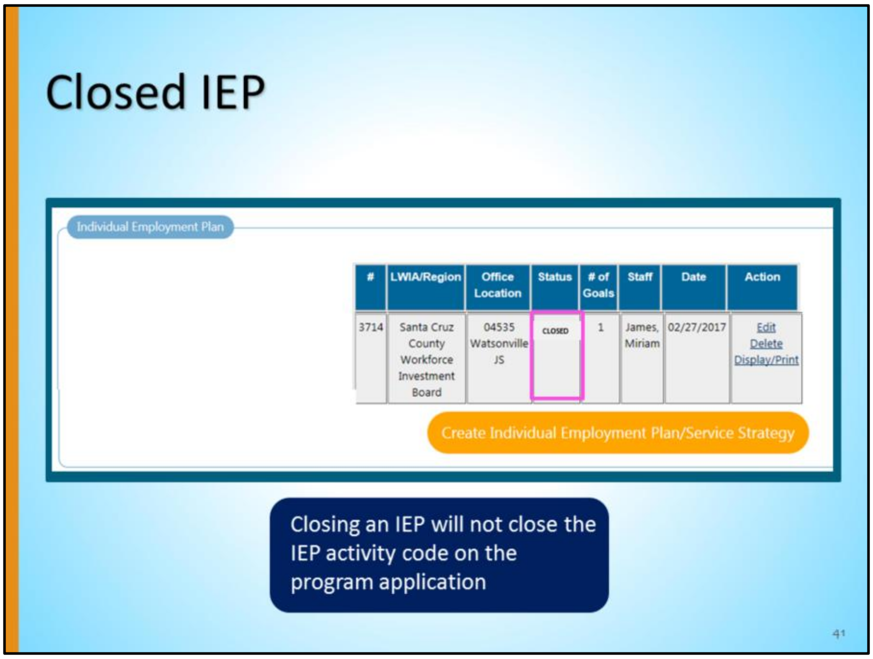
Click "Save."



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. <u>This will affect the individual’s exit date.</u>



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

42

Where to Find CalJOBS Activity Codes

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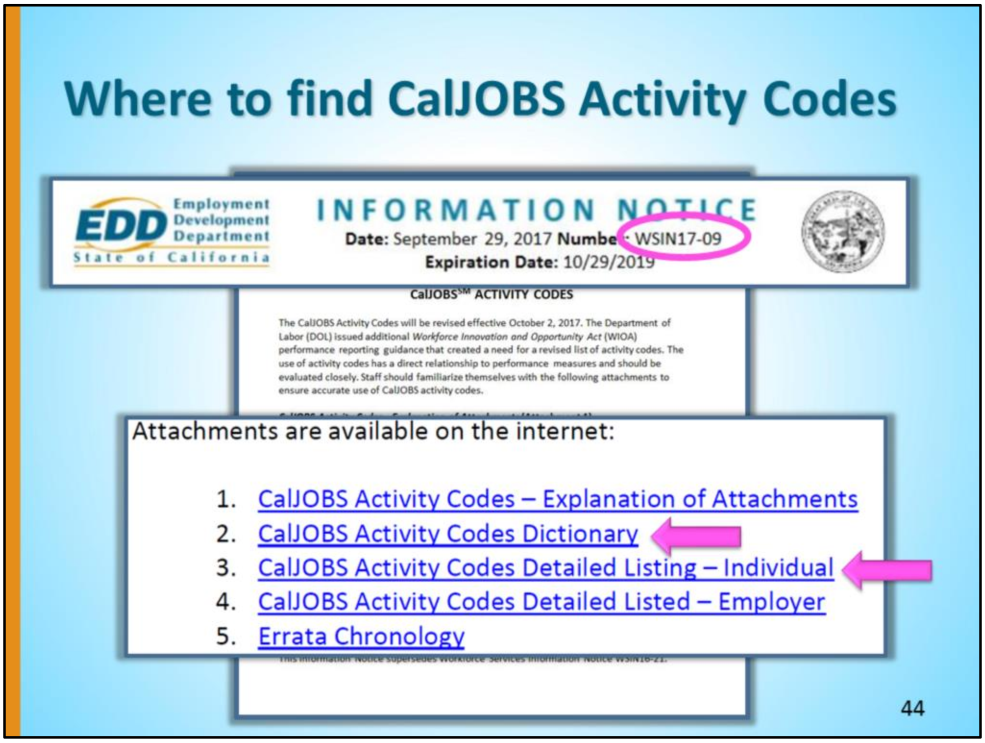
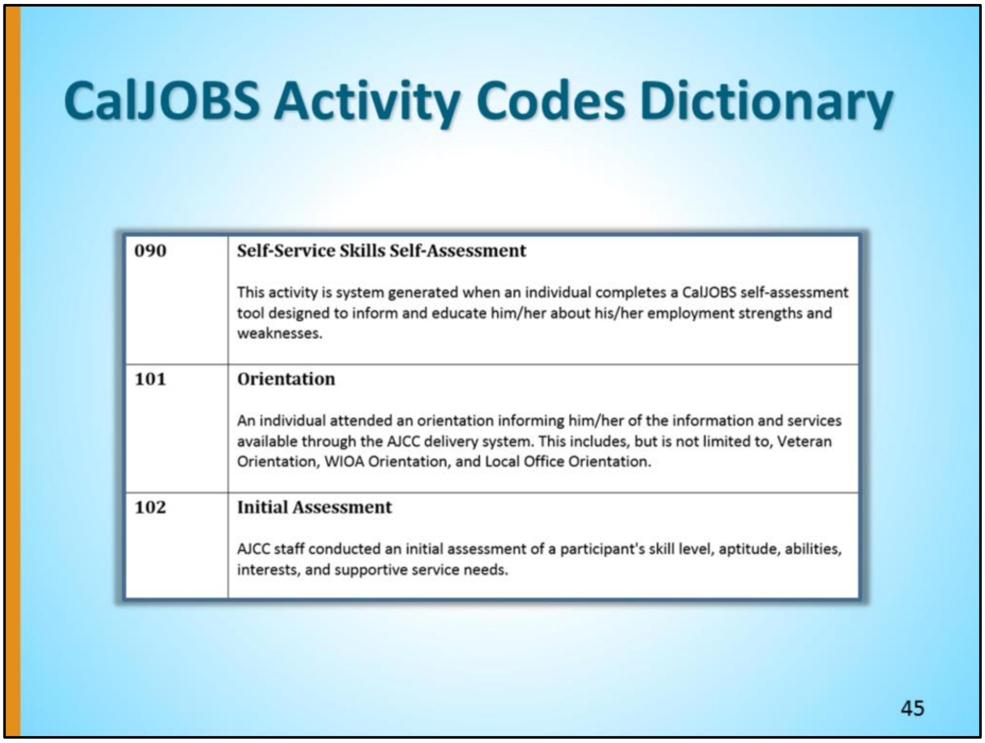
Before we review how to create Participation, let's review some information on CalJOBS activity codes, including where to find information and guidance on each code. To access the current Information Notice on CalJOBS activity codes, go to www.edd.ca.gov and type in WSIN17-09 in the top search bar.



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



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

CalJOBS℠ Activity Codes Detailed Listing – Individual

		Program Affiliation							Restart		
#	Activity Code Name	Adult/ DW	Youth	WP	JVSG	MSFW	TAA	Reporting Category	Exit Clock?	PIRL	Duration (Days)
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 (FCJL)	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

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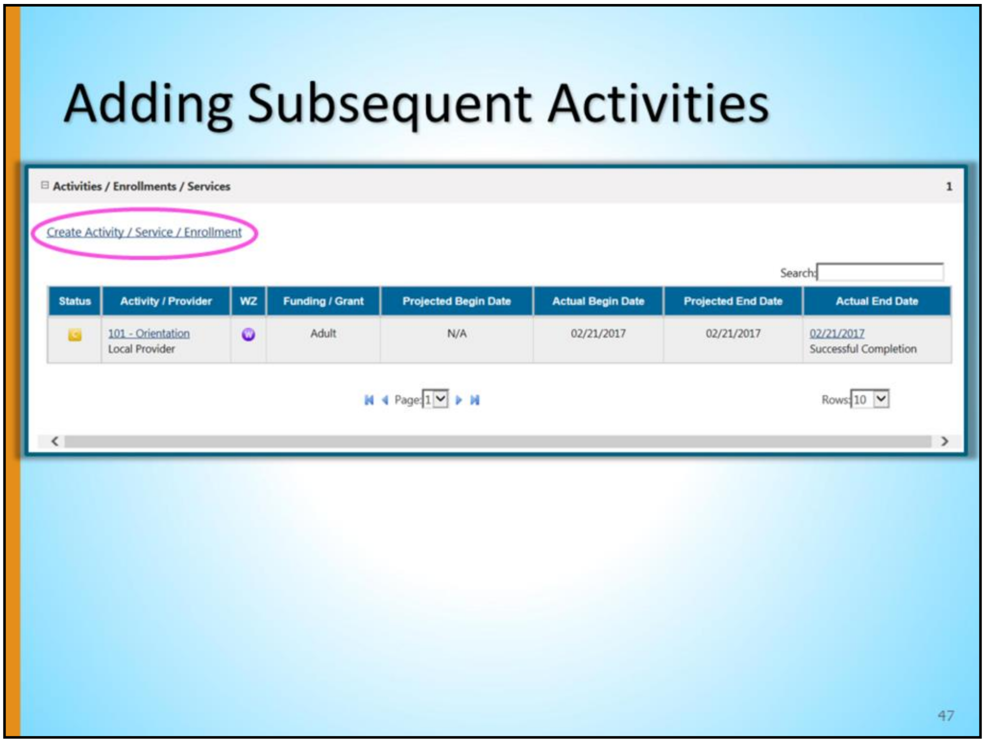
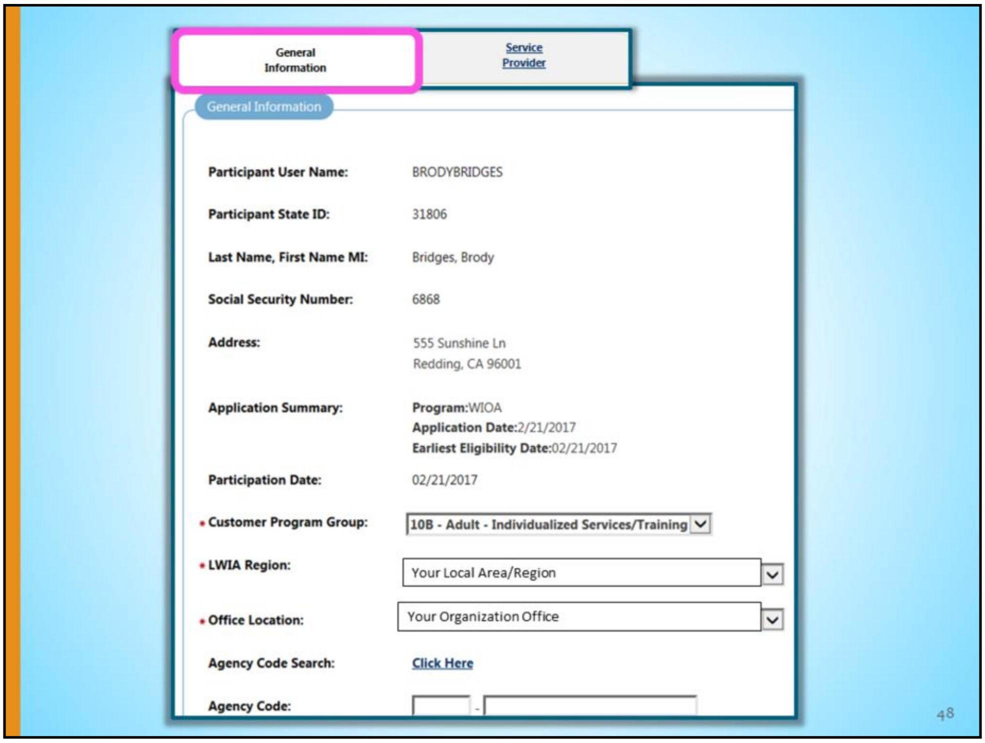
The Activity Codes Detailed Listing- Individual provides information about the activity code, including the program affiliation and reporting category.



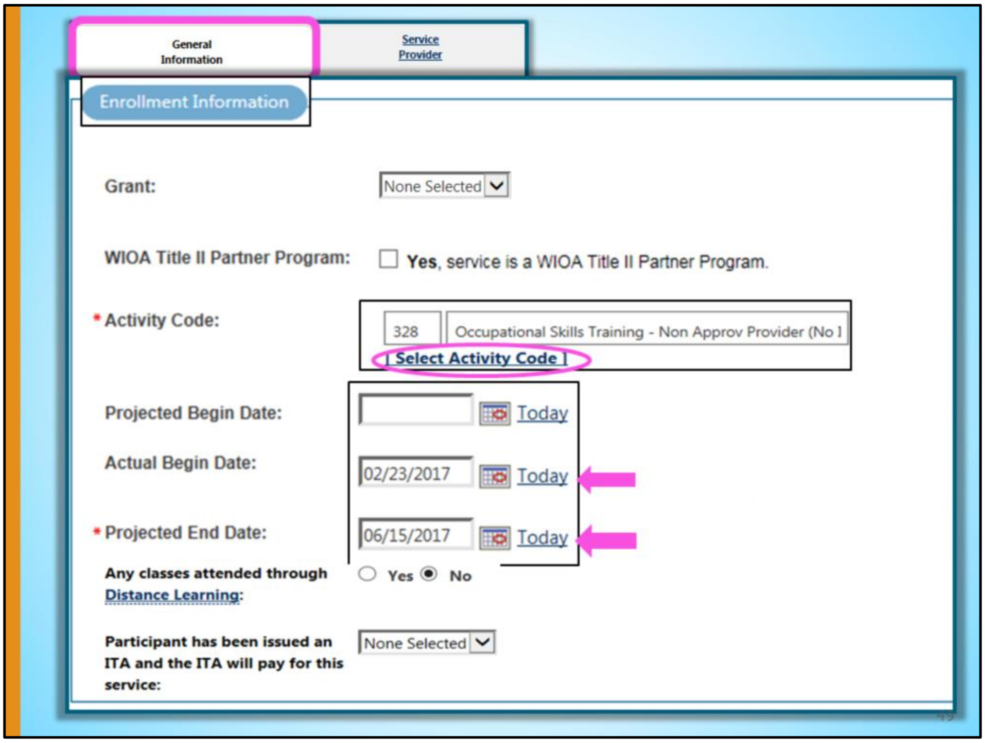
To enter another activity code, choose the "Create Activity/ Service/ Enrollment" link on the **Activities/Enrollments/Services** ribbon.



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.



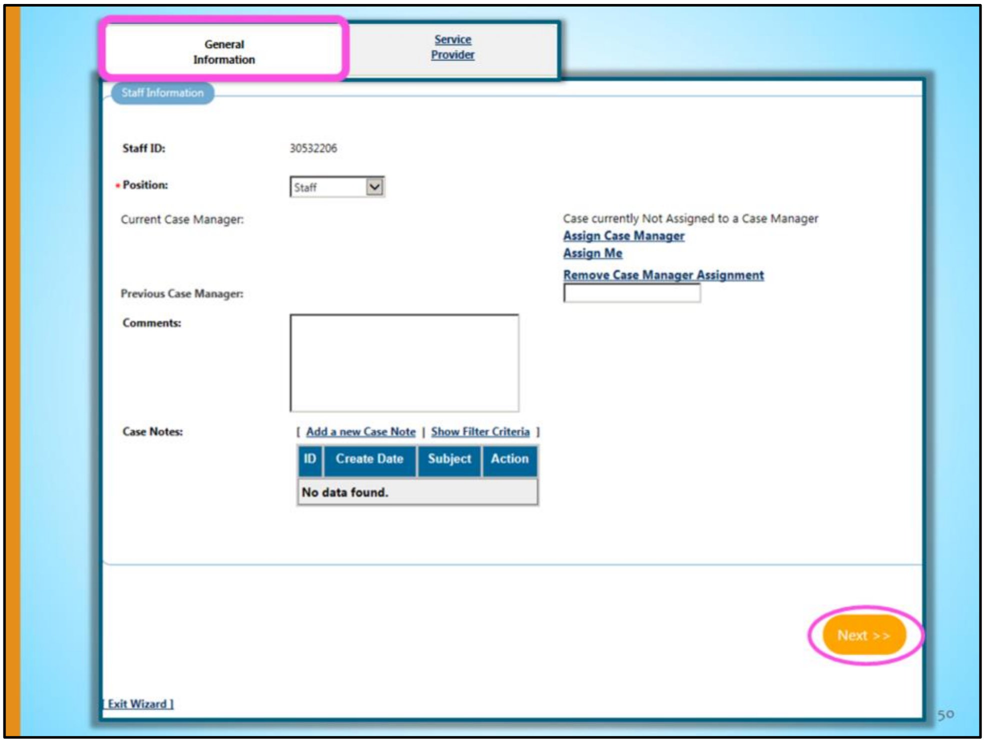
Still within the **General Information** tab, scroll down to **Enrollment Information.**

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.

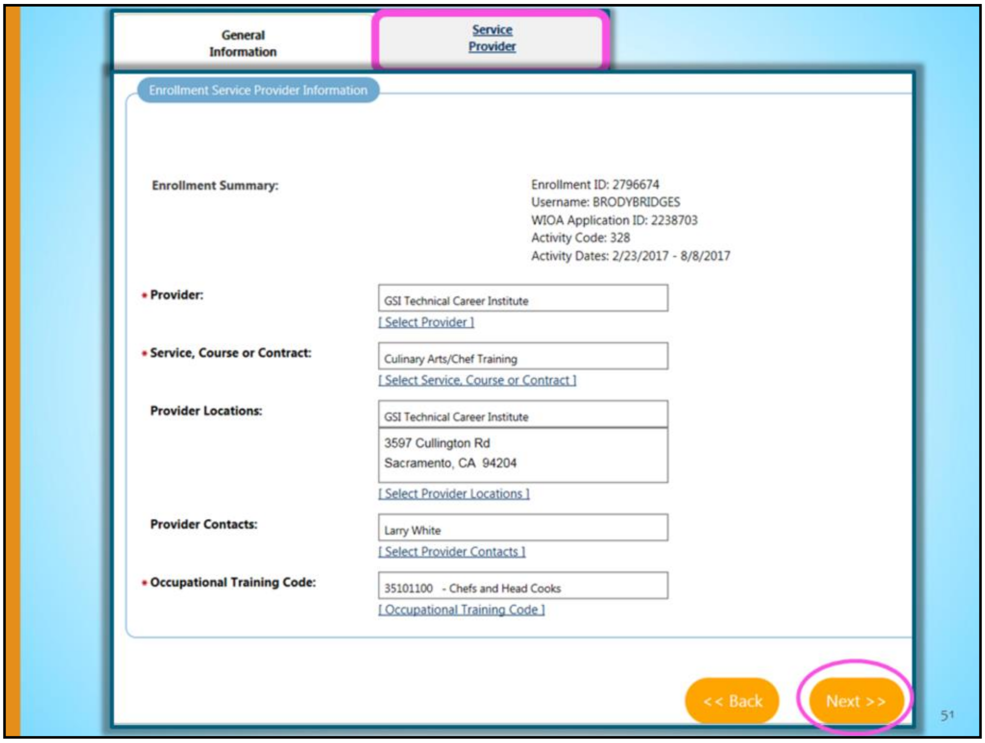
Next, enter an **Actual Begin Date**. You may choose the "Today" link to populate today's date, click on the picture of a calendar to populate a calendar for which to choose the date, or manually enter the date into the box.

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**.



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.



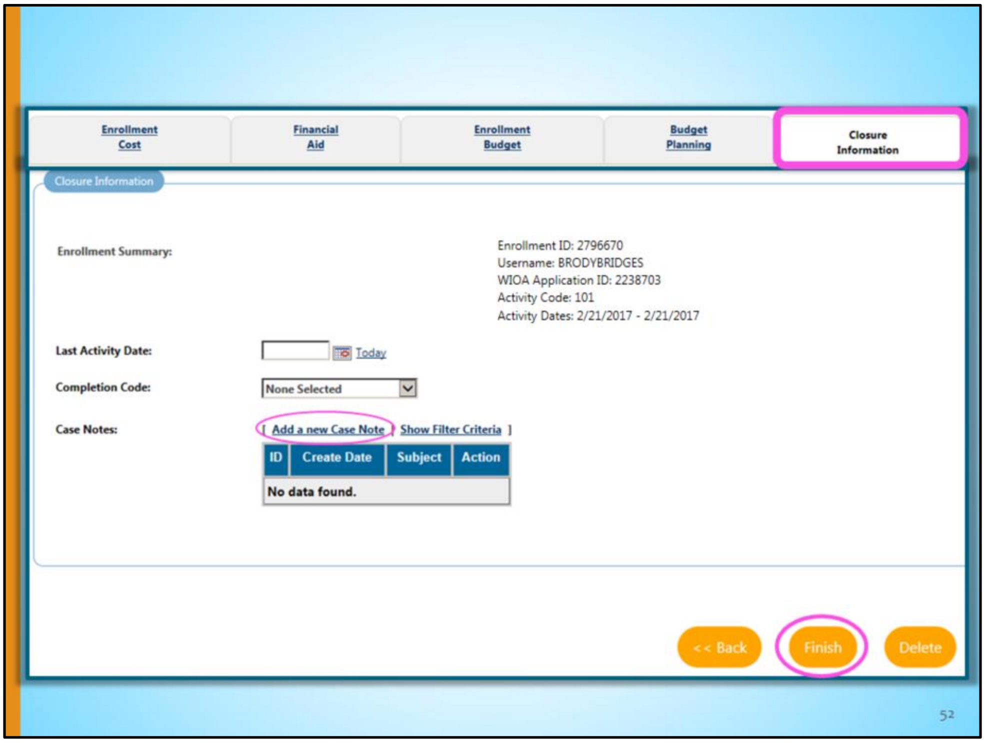
Next, on the **Service Provider** tab, you must complete the **Enrollment Service Provider Information**. If you are completing a training activity code, such as in our example, you must select the provider who will provide the training by selecting the "Select Provider" link. This will generate a pop-up 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".

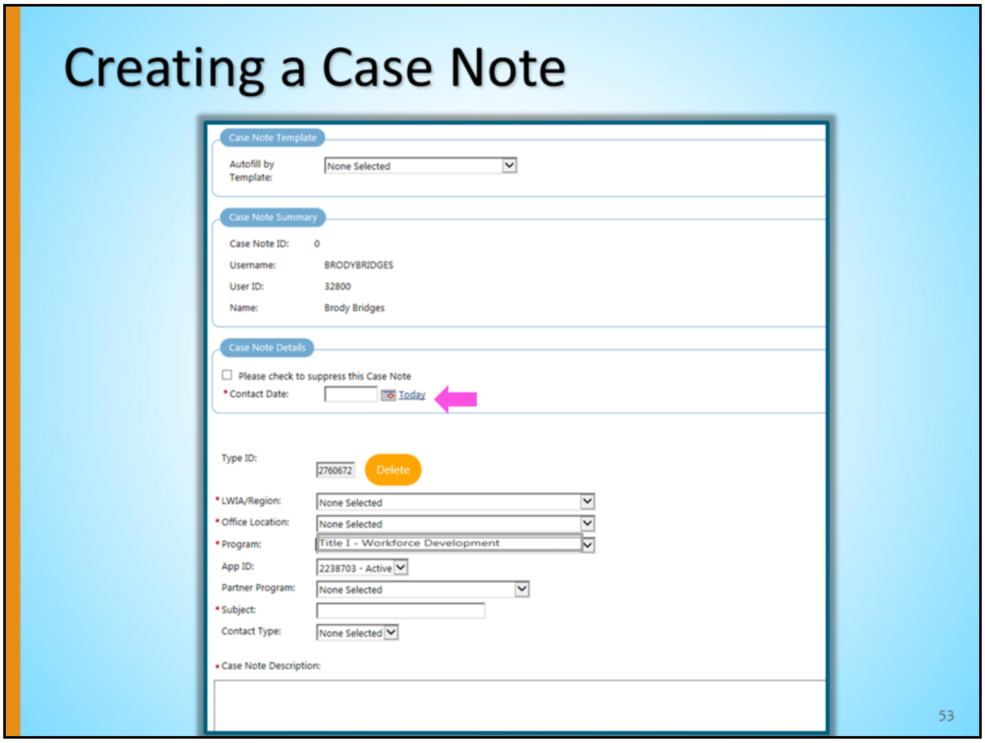


If you are creating a training activity code, you will be brought to the **Enrollment Cost** tab after selecting "Next" on the previous slide. For our training purposes we will not review the **Enrollment Cost, Financial Aid, Enrollment Budget, or Budget Planning** tabs.

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.



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.

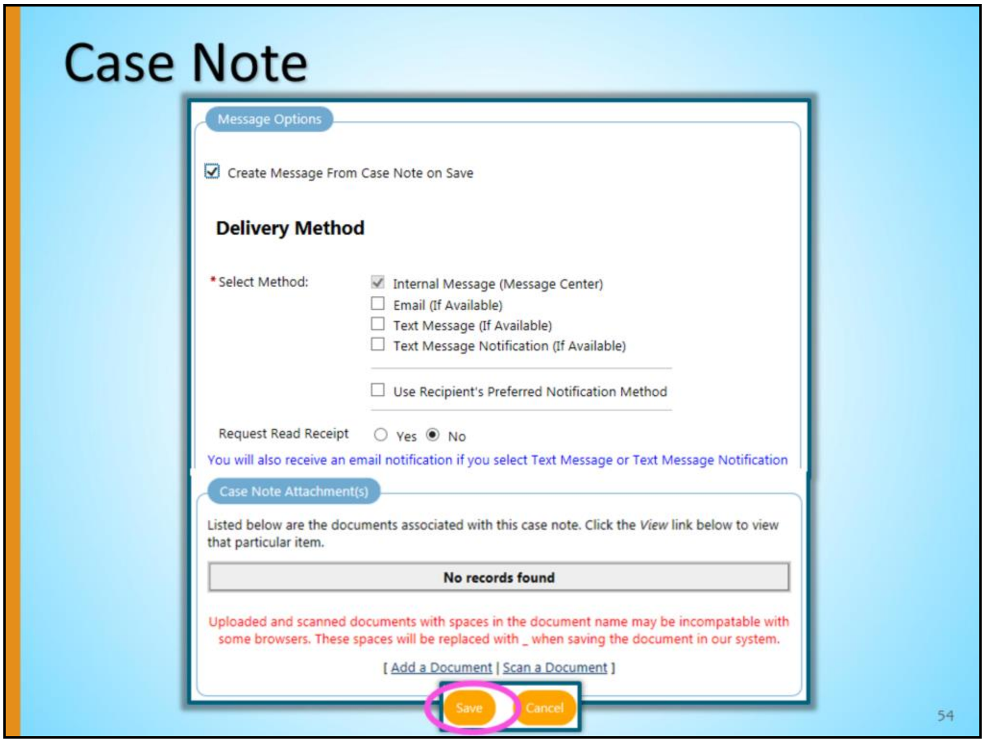
The **Case Note Details** section must be completed. Enter the **Contact Date** and whether or not you want to suppress the Case Note. A suppressed Case Note means that the note will not be visible to others, just you.

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**.

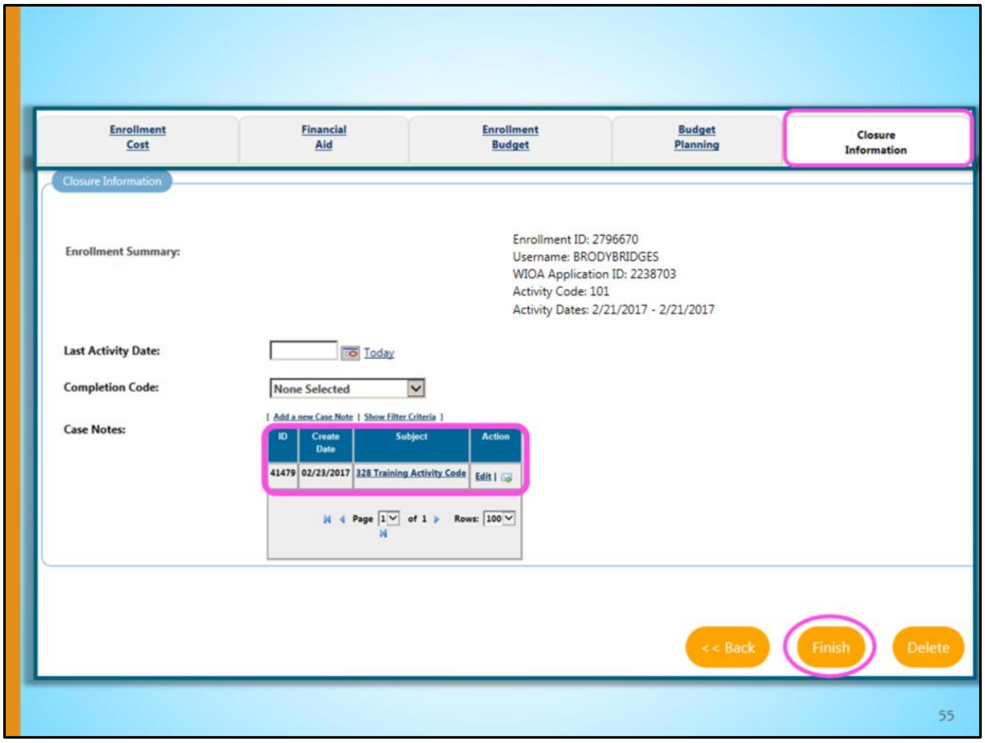
Note: It may be very beneficial for you to use a consistent naming convention for the subject of your case notes. For example, writing the number of the activity code the case note corresponds to (in our example, 328).This will be very helpful when running a case note report.



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.

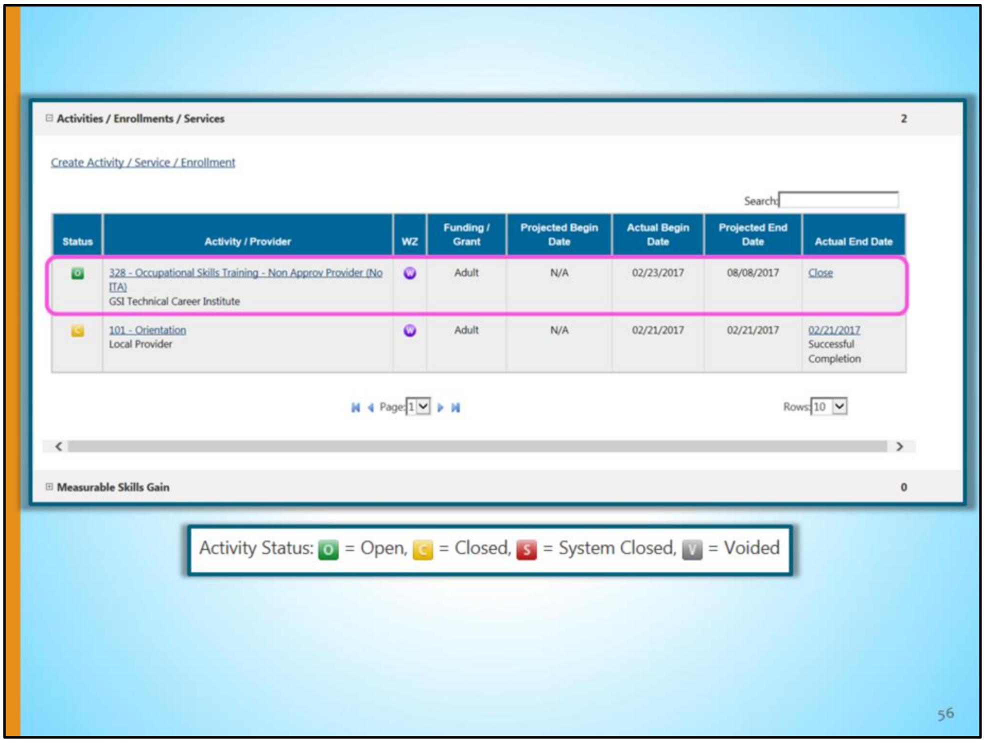
The system will allow you to scan or upload a document to be associated with this note if you need to do so. This may be done by selecting either the "Add a Document" or "Scan a Document" link.

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



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

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



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

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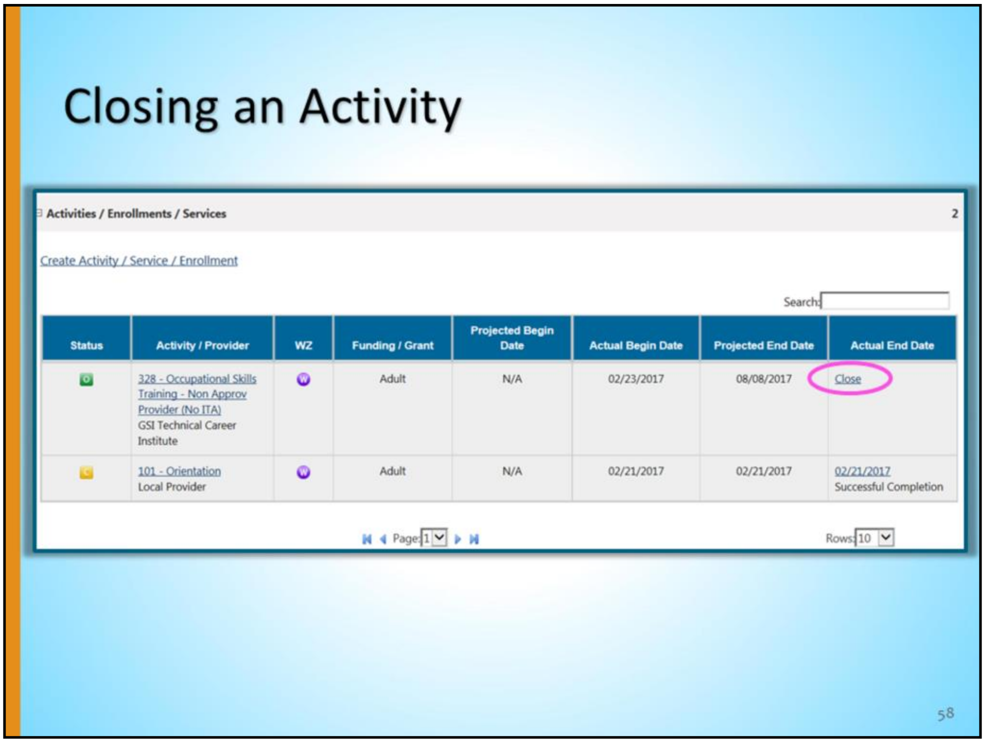
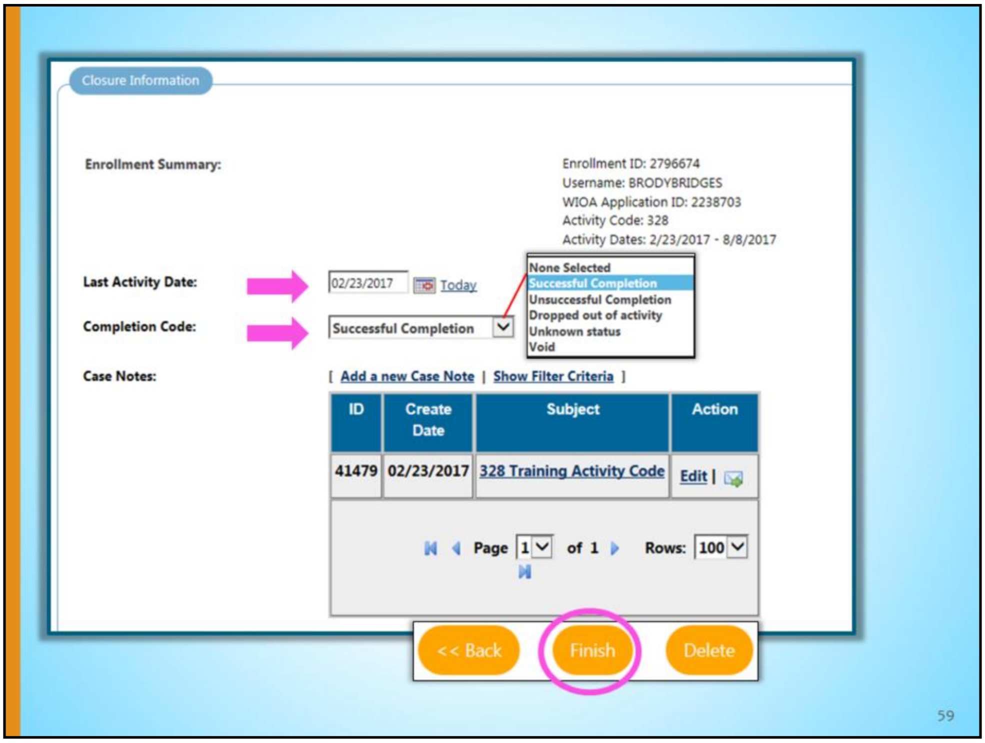


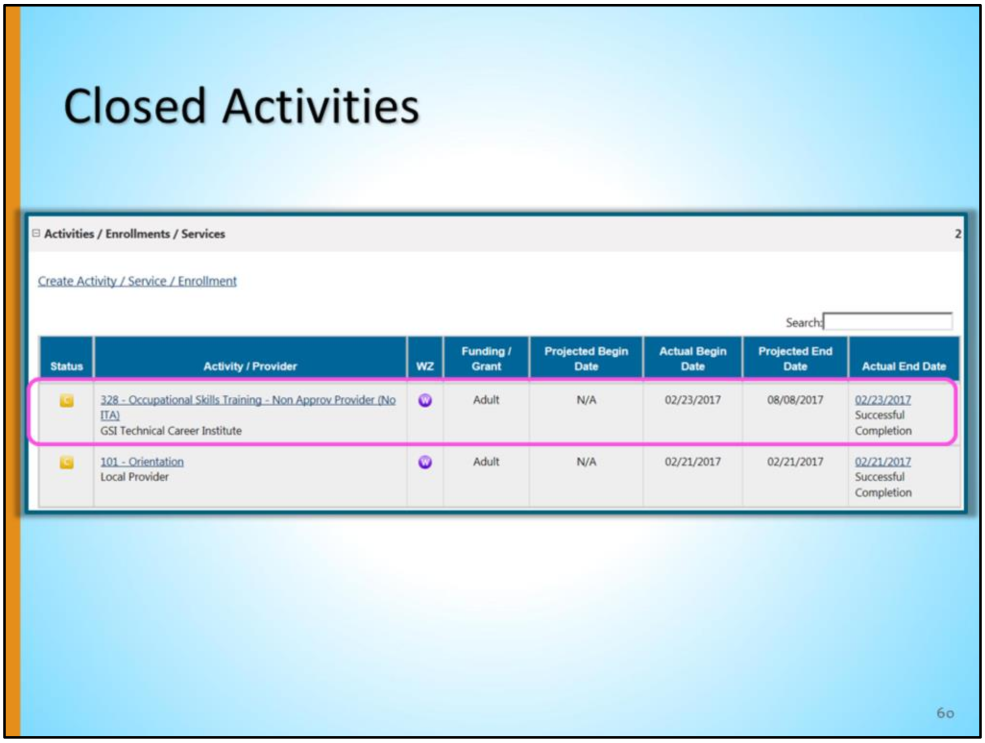
To indicate that you have completed providing a service to an individual, you will close that particular activity. To close an activity, expand the **Activities/Enrollments/Services** ribbon. This will bring you to your activity table. Select the "Close" link in the far right column for the activity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



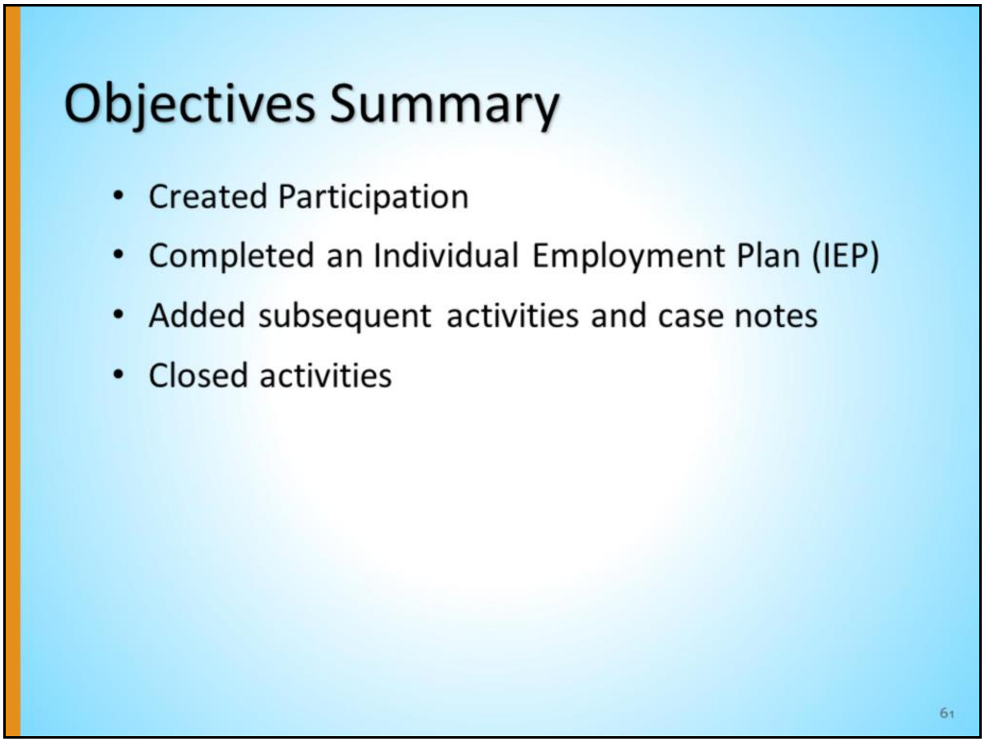
Select the **Last Activity Date**.

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

Select the “Finish” button.



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.



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.

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