

# CaJOBS<sup>SM</sup> Training

## Individual Registration and the Title I Application



Welcome to CaJOBS Training! In this training, we will review the individual registration process, as well as the Title I application.

# Objectives

- Review Introduction to CalJOBS
- Complete Individual Registration
- Identify CalJOBS System Business Rules
- Complete a Title I Application

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In this training, we will:

- Review Introduction to CalJOBS.
- Complete Individual Registration – Entering an individual into the system.
- Identify CalJOBS System Business Rules – Understanding some key points in navigating the Title I application.
- Complete a Title I application – Establishing eligibility for your program.

# Introduction to CalJOBS

# CalJOBS<sup>SM</sup>

CalJOBS<sup>SM</sup> is a virtual one-stop labor exchange website.

The screenshot shows the CalJOBS website interface. At the top left is the logo "CA.GOV CalJOBS<sup>SM</sup>". To the right of the logo are links for "En Español", "Register New User", and "Forgot Password?". Below these are input fields for "Username" and "Password", and a "Sign In" button. A central banner features a photo of hands typing on a laptop with the text "UI Online<sup>SM</sup> It's here!" and a description: "A fast, convenient, and secure way to access claim information, certify for benefits, and manage claims." with a "LEARN MORE >" button. Below the banner are three main navigation buttons: "Find a Job", "Find a Candidate", and "Find an Office". To the right of these are two green buttons: "More Career Services" and "More Employer Services". At the bottom is a "Job Search" section with the text "Search for jobs in your area." and input fields for "Enter Keyword", "Enter City", "Enter ZIP Code", a "10 miles" dropdown menu, and a "Search" button.

## Introduction to CalJOBS



Employer Services



Individual Services



Staff Services

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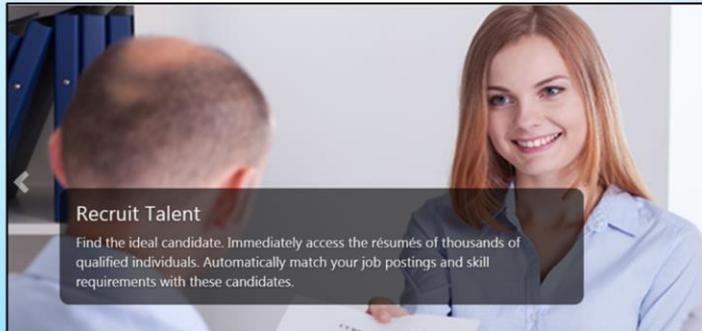
CalJOBS is utilized by three main customers:

- Employers
- Individuals (or job seekers)
- Staff

Each customer uses CalJOBS in a different way, but all of these customers use the system to engage in the labor exchange system and workforce development community. Let's take a look at each customer and which common features they utilize.

## Employer Services

- Post jobs
- Recruit candidates for a job
- Access Labor Market Information
- Send correspondence to job seekers



Here are a few of the services available to Employers:

- Post jobs
- Recruit candidates for a job
- Access Labor Market Information
- Send correspondence to job seekers

## Individual Services

- Build a résumé
- Search for jobs
- Set up a Virtual Recruiter
- Access Labor Market Information



Individuals who use CalJOBS include adults, dislocated workers, youth, veterans, job seekers, those collecting unemployment insurance benefits, and people looking for a new career path.

A few features available to individuals within CalJOBS include:

- Build a résumé- A registered individual can choose from several different methods to build a résumé in CalJOBS.
- Search for jobs- use a variety of search options to find the right job
- Set up a Virtual Recruiter- allows job seekers to automate the task of searching for available job openings



An individual or an employer can go to a local America's Job Center of California (AJCC) for assistance in finding a job, learning about the possibilities of job training, or posting a job and searching for candidates. Let's take a look at how staff use CalJOBS to assist in these functions.

## Staff Services

- Provide job search assistance
- Complete applications and enroll in programs
- Track services
- Run reports



Staff who use CalJOBS may be an EDD employee, a local area staff, or a non-local area staff.

This list we've provided is not exhaustive, but we want to give you an idea of how Staff can use the system:

- Provide job search assistance- help individuals build their profile, help create résumés, and help set up Virtual Recruiter
- Complete applications and enroll in programs
- Track services
- Run reports



CalJOBS is a valuable tool that can link qualified job seekers with employers, help individuals to find job training, and assist staff to manage WIOA program applications, eligibility, services, and reports, all with the end goal of improving employment outcomes in the State of California.



## **System Navigation and Layout**

Before we review Individual Registration, we would like to review some basic navigation and helpful features that can be utilized when using CalJOBS.

## Live Website



[caljobs.ca.gov](http://caljobs.ca.gov)  
For job seekers,  
employers, and staff

## Training Website

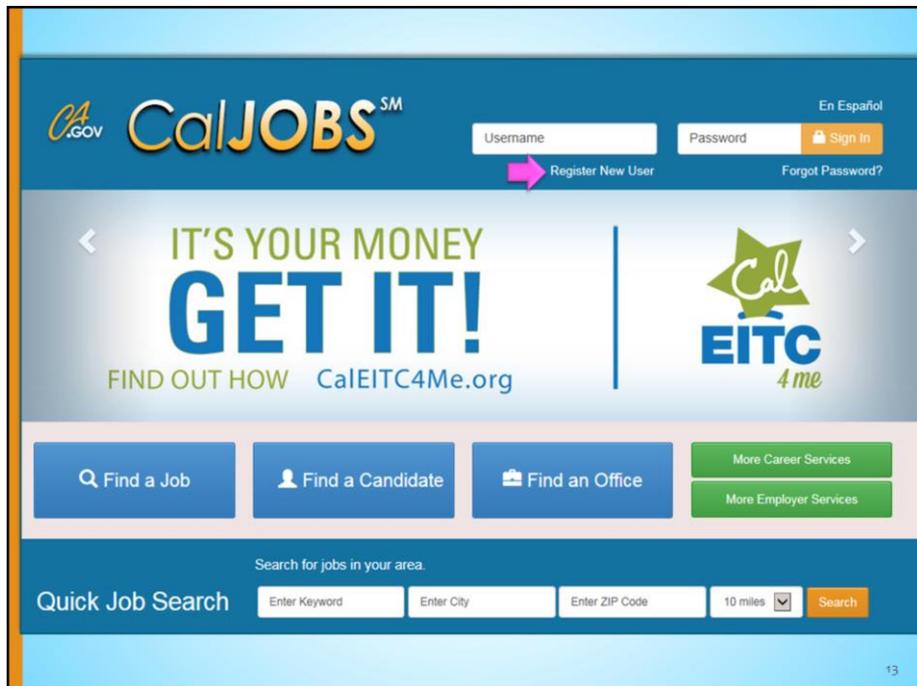


<https://training...>  
For training and  
practice

There are two CalJOBS websites:

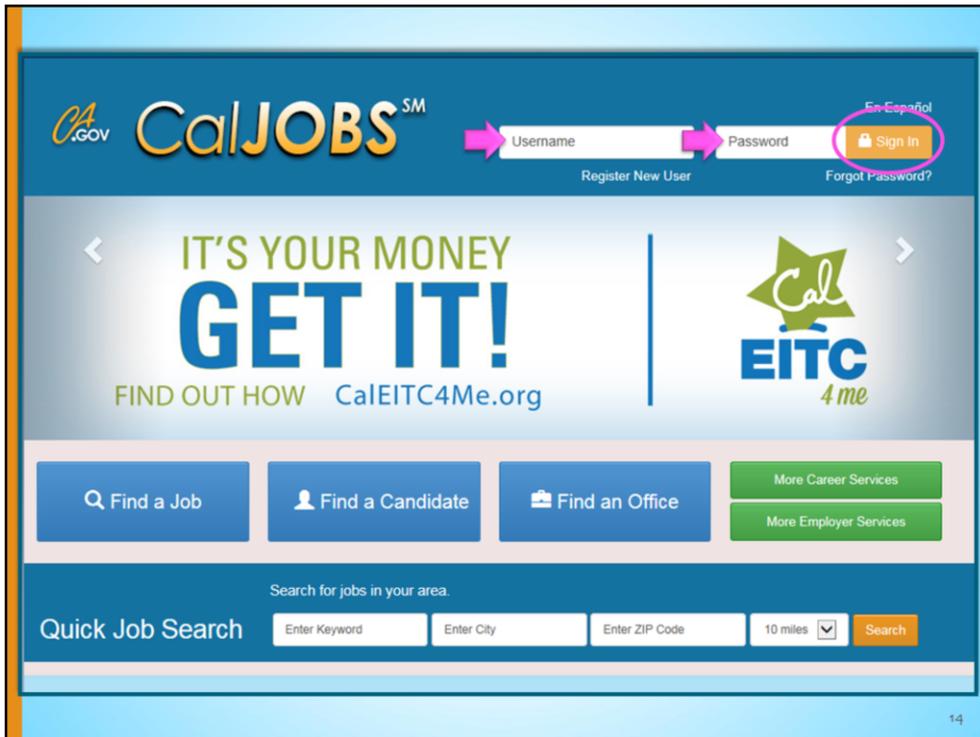
The Live Website is managed by the CalJOBS Operations Unit. This site is used by job seekers, employers, and staff and has real, live data.

The Training Website is managed by the Capacity Building Unit (CBU). This site is only available to staff, who can use it to learn and practice in the system. The individuals and employers shown in the training site are fictional, but it does access actual job postings.



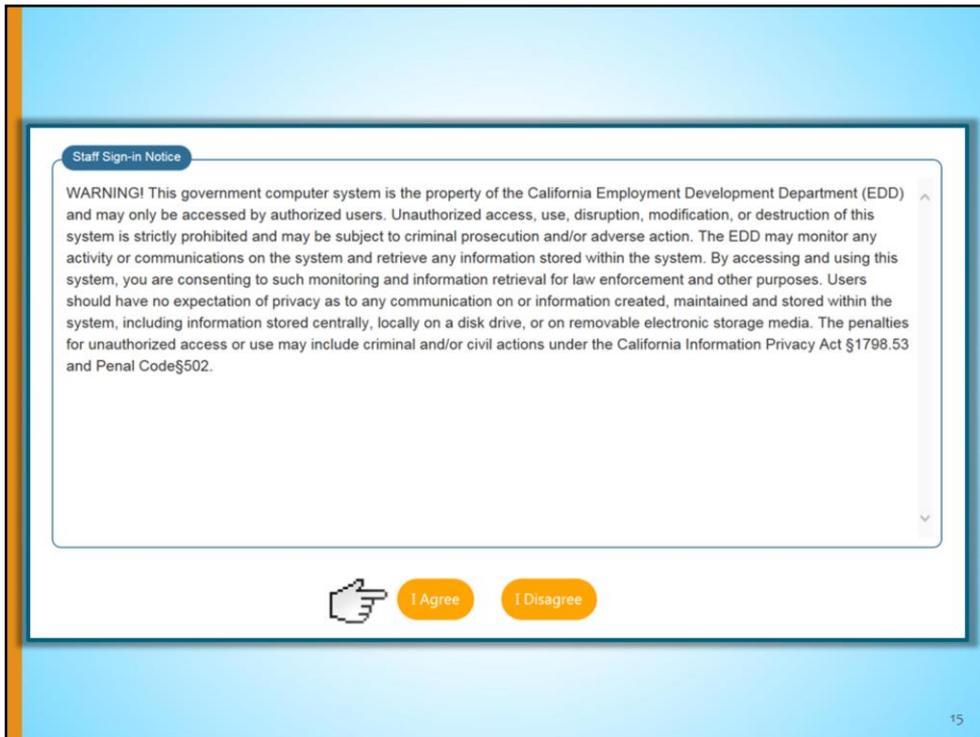
When it comes to registration in CalJOBS, it is encouraged that individuals register themselves in the system. They simply select the Registered New User link at the top right of the home page of [www.caljobs.ca.gov](http://www.caljobs.ca.gov), and follow the instructions to create a user name and password, and complete their registration.

In addition, you, as a staff member, can complete registration on behalf of an individual. This is what we will demonstrate in this module.

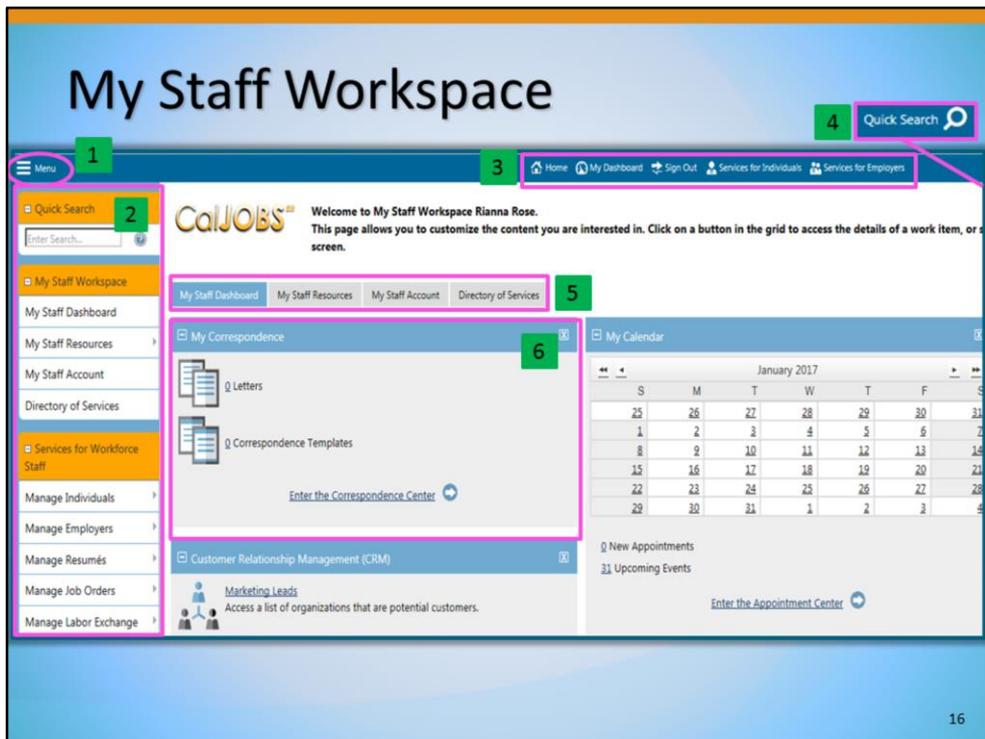


To register an individual, go the [www.caljobs.ca.gov](http://www.caljobs.ca.gov) homepage or “splash page”.

Login by entering your staff information into the fields: Username and Password. Select the “Sign In” button to the right.



Read the **Staff Sign-in Notice**, select “I Agree”.



The first screen you will see is **My Staff Workspace**.

There are six key areas:

1. At the top left corner of the screen there is a hamburger Menu that you can select, and it will expand or collapse the gold navigation menus on the left hand side.
2. To the left of the screen, there are gold navigation menus going vertically down the page. The gold navigation menus are also customizable if you go to **My Staff Resources > My Preferences > Configure what menu groupings appear**.
3. At the top of the screen, there are short-cut links (**Home, My Dashboard, Sign Out**, etc). These links follow throughout all navigation of CalJOBS.
4. At the top right of all screens there is a magnifying glass icon for conducting a **Quick Search**. This allows staff the ability to quickly conduct an individual or employer search regardless of where they are in the system.
5. Near the top of the page, there are blue and gray tabs going horizontally across the page (**My Dashboard, How We Can Help You**, etc.), which is another way to get to the same pages that we see on the left menu. Left menus or tabs – they accomplish the same thing.
6. The widgets that fill the rest of **My Staff Workspace** are shortcuts to frequently-used tasks and pages. The widgets are customizable, so you can move them, collapse them, and delete them per your preferences.

# CalJOBS Navigation and Layout

The screenshot shows a navigation menu on the left side of the CalJOBS interface. The menu is titled 'My Staff Workspace' and contains several items: 'My Staff Dashboard', 'My Staff Resources', 'My Staff Account', and 'Directory of Services'. The 'My Staff Resources' item is expanded, showing a list of sub-items: 'Correspondence', 'Messages', 'Communication Templates', 'My Alerts', 'Search Lists', 'Assigned Cases', 'My Reports', 'My Virtual Recruiter', and 'My Preferences'. The 'My Preferences' item is highlighted with a pink border. To the right of the menu, there is a list of items: 'My Staff Account', 'My Staff Resources', and 'My Preferences'.

- My Staff Account
- My Staff Resources
  - My Preferences

Within CalJOBS, we can use the **My Staff Account** and **My Preferences** features to customize many aspects of the system. For example, we can customize the order in which the gold left hand navigation menus appear on our screen by hovering over **My Staff Resources** and selecting **My Preferences**.

# CalJOBS Navigation and Layout

☰ Communications
Messages
Correspondence
Alerts ▶
Virtual Recruiter
Email Log

☰ Schedules
Appointment Calendar
Events Calendar

- Communications
- Events Calendar
- Labor Market Services
- Staff Online Resources

☰ Other Staff Services
Labor Market Services ▶
Assistance Center ▶
Staff Online Resources ▶
Staff Online Courseware ▶
Geographic Solutions Community Site

Other helpful features include: the **Communication** section, which we can access the message center and system alerts; the **Events Calendar**, which we can add and view upcoming events; **Labor Market Services**, which includes labor marker area profile, industry profiles, occupational profiles; and **Staff Online Resources**, an area in CalJOBS that houses many staff resource guides.

# Individual Registration

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The first step in using CalJOBS is to register the individual you're serving in the system.

## What is Individual Registration?

- Individual Registration gives job seekers access to wide range of CalJOBS labor exchange features, including a resume builder, access to job postings, and labor market information.
- Individuals or staff members complete a form with required data fields that collect information on the user.
- It is required for all participants and is separate from the Title I application.

# Search for an Individual

The screenshot shows the CalJOBS staff workspace. At the top, there is a navigation bar with 'Home', 'My Dashboard', 'Sign Out', 'Services for Individuals', and 'Services for Employers'. Below this is a 'Quick Search' bar and a welcome message for 'Monica Cuellar-Lopez'. The main content area is divided into several sections: 'My Correspondence' (with 'Letters' and 'Correspondence Templates'), 'My Calendar' (showing a calendar for November 2017), and 'My Messages' (with 'Unread Messages' and 'Read Messages'). A dropdown menu is open over the 'Services for Workforce Staff' section in the left sidebar, listing options: 'Create an Individual', 'Common Intake', 'One Case Note to Multiple Individuals', and 'Assist an Individual'. An orange arrow points to the 'Assist an Individual' option. The page number '21' is visible in the bottom right corner.

Before we begin creating an individual, the first thing you will need to do is **“Search for an Individual”** to verify that the individual you are assisting has not been registered with the system before. And the way you would do that is by selecting **“Assist an Individual”**.

Occasionally, individuals that you are assisting may already be registered or partially registered in the system. For example, if an individual has applied for unemployment insurance they may have what we call a starter record. If this is the case their social is already in the system. So at that point you would just need to assist them with completing the registration process.

# Search for an Individual

## Quick Assist

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

Here are the 5 most recent individuals you assisted:  [Assist](#)

[\[ Top | Search | Bottom \]](#)

## General Criteria

Individual Username:

Individual User ID:

Starts with these #s  
 Matches exactly

State ID Number:

First Name:

Last Name:

SSN (last 4 digits):

SSN (full number):  Example: 999999999

State Source ID:



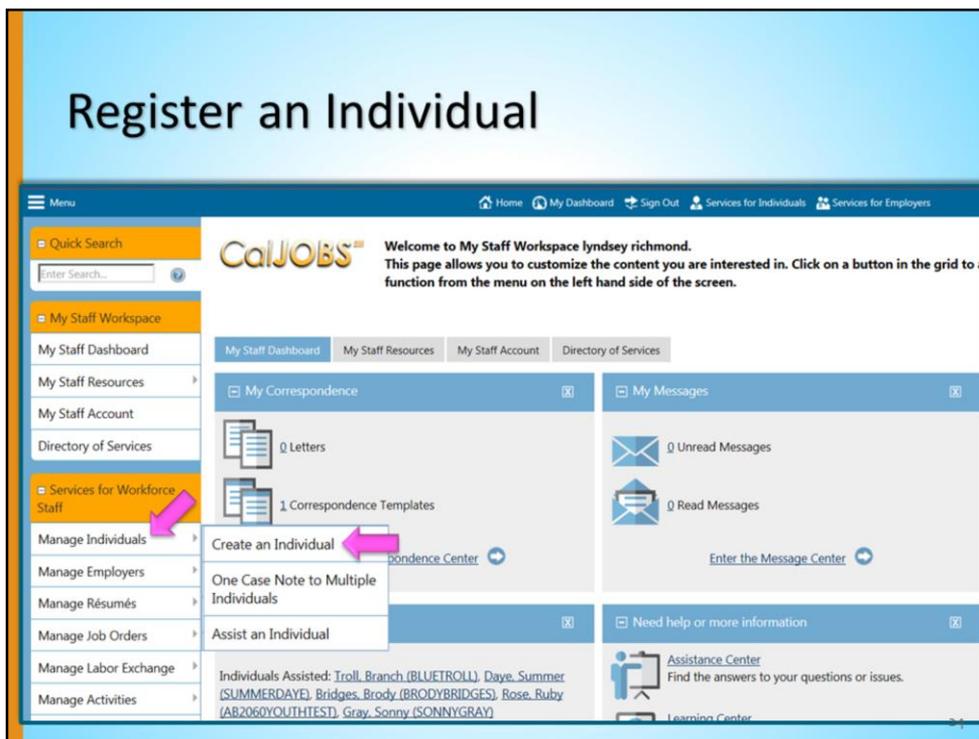
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Here, you can either search for an individual by social security number or first name, last name, and the last 4 numbers of the individual's social security number.

# Search for an Individual

The screenshot displays the CalJOBS search interface. At the top left is the CalJOBS logo. The main heading reads "There are no Individuals that meet your search criteria." Below this, a message states "There are no Individuals that meet your search criteria." followed by the search criteria: "SEARCH CRITERIA: First name begins with Batman and Last name begins with Love". Two links are provided: "[ [New search criteria](#) ] [ [Modify current criteria](#) ]". A prominent orange button labeled "My Staff Dashboard" is centered. Below it is a horizontal menu with icons for "Services", "Site Map", "Site Search", and "Page Preferences". A footer section contains links for "Privacy Statement", "Disclaimer", "Terms of Use", "Accessibility", "Recommended Settings", "EEO", "Protect Yourself", "About this Site", and "Contact Us". A "Track Page" link is also present. At the bottom, there are "Home" and "Sign Out" buttons, a copyright notice for 1998-2017 Geographic Solutions, and a version number "17.1".

And in this example there is no individual with the name Batman Love, so than you would need to create an individual.



Once you have determined the individual is not registered in the system, you would want to register them to record the services either by self registration or staff assisted registration.

For this demonstration we will complete a staff assisted registration only – please note, that the registration steps are the same steps an individual/customer would see when self registration.

While on **My Staff Workspace**, let's register an individual. On the left menu, under the gold menu heading **Services for Workforce Staff**, hover over **Manage Individuals**, and select **Assist an Individual**.

Indicates required fields.

**Login Information**

- User Name:** 
  - Enter a unique user name (8 - 256 characters, and must include characters, letters or numbers. Allowable characters are + @ \_ . Spaces are not allowed.
- Password:** 
  - Enter Password (8 - 20 characters, and must include at least one uppercase letter, one lowercase letter, one number and one special character. Allowable characters are # @ % ^ \* ! " , \_
  - Example: Sample1#
- Confirm Password:**
- Security Question:** 
  - Last Changed: 8/24/2016 8:50:29 AM, lyndsey richmond
- Security Question Response:** 
  - Special characters are not allowed.

**Social Security Number**

- Social Security Number (SSN):** 
  - Do not enter dashes (for example, 999001111)
- Re-enter Social Security Number:**

**Primary Location Information**

- Country:**
- Please enter your zip code:**  [Find zip code](#)
- Are you authorized to work in the United States?**  Yes  No

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CalJOBS is ready to assist you as you complete the required registration fields. Please note the red asterisks, blue text, question mark icons, and underlined links (e.g., “Find zip code”) that will help you complete the individual registration.

Complete the information in the **Login Information** fields. When creating a Username and Password, be sure to write it down to ensure your individual has the correct login information. In addition, refer to the blue text for creation guidelines.

The system defaults the **Password** field to Password1@. You can keep this generic password, but the individual will need to change the password after their initial login.

In the **Social Security Number** section, enter the individual’s SSN.

In the **Primary Location Information** section, enter the individual’s zip code using the [Find Zip Code](#) link if necessary, or simply type it into the box.

Next, select the appropriate option for the **Are you authorized to work in the United States** question. In this example, we selected “Yes”.

The screenshot shows a registration form with the following sections:

- E-mail Address:** Includes fields for 'Primary E-mail' and 'Confirm Primary E-mail Address'. A link for 'Read Our E-mail Security Policy' is located between the two fields.
- Demographic Information:**
  - Date of Birth:** Field contains '07/11/1990 (mm/dd/yyyy)'. A red message below reads: 'You indicated your date of birth as July 11, 1990.'
  - Age:** Field contains '26'.
  - Gender:** Radio buttons for 'Female', 'Male' (selected), and 'I do not wish to answer'.
  - Have you registered with the Selective Service?:** A dropdown menu is open, showing options: 'None Selected', 'Yes', 'No', 'Documented exemption from registration', and 'Not applicable'. A pink arrow points to this question.
  - Scan Card Information:** Includes a 'Scan Card ID' field.
- Next >>:** A yellow button at the bottom right, circled in pink.

The **E-mail Address** section is optional, but you may enter the individual's Primary E-mail address here.

In the **Demographic Information** section, if you select that your individual's **Gender** is a Male, you must complete the following question, **Have you registered with the Selective Service?** Notice your options. You may use the [Selective Services web site](#) link to confirm if the individual is or is not registered with the Selective Service.

After completing the information on this first page, select the "Next" button at the bottom.

The image shows a screenshot of a web form titled "Name" on a light blue background. The form contains three input fields: "First Name" with the text "Jane", "Middle Initial" which is empty, and "Last Name" with the text "Test" and a clear button (X). Below the form are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. A small number "27" is visible in the bottom right corner of the screenshot area.

Enter the individual's **First** and **Last Name** (Middle Initial is optional). Select the "Next" button.

**Residential Address**

Are you homeless?  
 Yes  No

**This is where you live.**

\* Address Line 1:   
Address Line 2:   
Apt #, Lot #, Building #, Suite #

\* Zip Code:  [Find zip code](#)  
\* City:   
\* State:    
\* County / Parish :    
\* Country:    
State Of Residency:

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Select the “Yes” radio button if the individual is currently homeless.

If the individual is not homeless, enter the individual’s **Residential Address**.

The screenshot shows a 'Mailing Address' form with the following fields and values:

- Mailing Address** (Section Header)
- This is where you receive your mail.
- Address has been standardized.** (Red text)
- Use residential address (A pink arrow points to this checkbox)
- Address Line 1: 1892 20TH ST
- Address Line 2: (Empty)
- Apt #, Lot #, Building #, Suite #
- Zip Code: 95811
- City: Sacramento
- State: California (Dropdown menu)
- Country: United States (Dropdown menu)

Navigation buttons: '<< Back' and 'Next >>' (The 'Next >>' button is circled in pink)

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If you select “Use residential address” for the **Mailing Address**, the individual’s residential address will fill in the fields below. The system will attempt to standardize the address to a known address listing for the area. Note that if the system states that the address is NOT standardized, you may still move further regardless of that message.

Select the “Next” button.

Phone Numbers

• Primary Phone:  -  -  Ext:

• Primary Phone Type:  ▼

Alternate Phone:  -  -  Ext:

Alternate Phone Type:  ▼

Text Message Cell Phone Number:  -  -

Only certain communications such as Virtual Recruiter Alerts can be sent via text message. Normal text messaging rates apply. Other important notices, including some regarding unemployment benefits, will NOT be sent via text message.

Fax:  -  -

<< Back    **Next >>**

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Enter individual's **Primary Phone** and **Primary Phone Type**. The system does have the capability to both text and e-mail notifications to individuals regarding job postings and employer contacts. You can enter information in **Text Message Cell Phone Number** should the individual wish to receive text notifications.

After information is entered, select the "Next" button.

The image shows a survey form with two main sections: "Preferred Notification Method" and "Site Access".

**Preferred Notification Method**  
Please select a method in which you prefer to receive your notifications:  
None Selected (dropdown menu)  
Internal Message  
Email  
Text Message (If Available)  
Text Message Notification (If Available)  
Internal Message with Email Notification

**Site Access**  
From where are you accessing this website? (dropdown menu)  
None Selected  
How did you hear about this website? (dropdown menu)  
None Selected

Navigation buttons: << Back and Next >>. The "Next >>" button is circled in pink.

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For the **Preferred Notification Method**, choose from the dropdown menu how the individual would like to receive notifications.

The next 2 questions are for statistical purposes, with the first being mandatory (**From where are you accessing this website**). Answer them by choosing the most appropriate option from the dropdown menus.

When finished, select the "Next" button.

The image shows a screenshot of a web form with a light blue background. At the top left, there is a blue pill-shaped button labeled "Citizenship". Below it, a white form field contains the text "\* Citizenship". To the right of this field is a dropdown menu. The dropdown menu is currently open, showing a list of options. The top option is "None Selected" in a dark blue background. Below it are four white options: "Citizen of U.S. or U.S. Territory", "U.S. Permanent Resident", "Alien/Refugee Lawfully Admitted to U.S.", and "None of the above". A small downward-pointing arrow is visible on the right side of the dropdown menu.

Citizenship

\* Citizenship

None Selected  
Citizen of U.S. or U.S. Territory  
U.S. Permanent Resident  
Alien/Refugee Lawfully Admitted to U.S.  
None of the above

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For the Citizenship question in the **Citizenship** area, select the appropriate answer.

**Disability**

- Do you have a disability?
  - Yes, I have a disability.
  - No, I do not have a disability.
  - I do not wish to answer.
- Are you deaf or do you have serious difficulty hearing?
  - Yes  No  Not Specified
- Are you blind or do you have serious difficulty seeing even when wearing glasses?
  - Yes  No  Not Specified
- Because of a physical, mental, or emotional condition, do you have serious difficulty concentrating, remembering, or making decisions?
  - Yes  No  Not Specified
- Do you have serious difficulty walking or climbing stairs?
  - Yes  No  Not Specified
- Do you have difficulty dressing or bathing?
  - Yes  No  Not Specified

Providing this information is optional and refusal to provide disability information will not subject you to any adverse action. If you have a disability, you may be eligible for additional support services and programs.

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In the **Disability** section, answer the questions according to your individual’s self-disclosure. If they choose to self-disclose a disability, they may be eligible for additional support services and programs.

For the question, **Do you have a disability?**, if your individual answers, “Yes, I have a disability”, there is an additional set of mandatory questions that populate. Answer according to your individual’s disclosure.

Answer the remaining questions. Once completed, select the “Next” button.

The screenshot shows a form titled "Education Information" with a light blue background. It contains two mandatory questions, each with a dropdown menu currently set to "None Selected". The first question is "Your Highest Education Level Achieved:" with a small red asterisk and a note below it: "If you have a High School Diploma or High School Equivalency Diploma, please select the appropriate value of High School Diploma or High School Equivalency Diploma." The second question is "Are you attending school?". To the right of the form are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. A blue border highlights the form area, and a pink oval highlights the "Next >>" button. The number "34" is in the bottom right corner.

Enter **Education Information** by choosing the most appropriate answers in the dropdown menus. Both questions are mandatory.

When done, select the "Next" button.

**1**

**Unemployment Eligibility Status?**

- UI Referred by Status:
- Claimant has been exempted from work search

**Claimant**  
Exhaustee

None Selected  
WPRS  
REA  
RESEA  
Not Applicable

**Employment Information**

- Current Employment Status: None Selected
- Type of business worked in: None Selected
- **Unemployment Eligibility Status?** None Selected
- Are you currently looking for work?  Yes  No

• Within the last 12 months, have you received a notice of termination or layoff from your job or received documentation that you are separating from military service?

Yes, I have recently received a notice of termination or military separation.  
 No, I have not recently received a notice of termination or military separation.

• Date of Layoff, Termination or Military Separation: (mm/dd/yyyy) Today

**2**

**Farm Worker Information**

- Have you performed work as a farm worker or food processor, including packing houses, nurseries, or orchards, for at least 25 days within the past 12 months?  Yes  No

**3**

- Was at least 50% of your income earned from farm work?  Yes  No

Type of National Farm Worker: No

<< Back Next >>

Complete the **Employment Information** and **Farm Worker Information** sections.

For the **Unemployment Eligibility Status**, if your individual answers “Claimant” or “Exhaustee”, an additional set of mandatory questions will populate (see top right green box “1”). Answer according to your individual’s disclosure.

The last two questions are also mandatory, and if “Yes” is chosen for either, additional mandatory questions populate (see bottom right green boxes “2” and “3”).

Once all mandatory answers are completed, select the “Next” button to continue.

**Job Title**

Please enter a job title below. As you are entering the job title, you may see a list of common job titles similar to what you are entering. If you see your job title in the list, select it.

• What is your desired job title?:

*Your desired job and occupation titles can be changed at any time after registration.*

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**Job Occupation**

Please select the occupation that best matches your job title. You may either select from the Suggested Occupations drop-down list, which is populated based on the job title above, or you can search for an occupation using the search link.

Suggested occupation(s):

- Nothing Selected
- Cashiers
- Counter and Rental Clerks
- Customer Service Representatives
- Retail Salespersons
- Tellers

• Occupation Title:

• Occupation Code:

<< Back    Next >>

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In the **Job Title** section, as you type the desired job title, a list of auto-complete suggestions will appear in a drop-down list for selection. Select the appropriate title in the drop-down. If the individual’s job title does not generate any auto-complete suggestions, you may try to enter an alternative name for that job title. If the system continues to not provide a matching job title, you may enter a unique job title.

Once a desired job title is selected, the “Suggested occupations” drop down should auto-populate in the **Job Occupation** section with similarly related occupations based upon the previous desired job title. If you entered a job title that did not auto-complete, you will need to select the [Search for an Occupation](#) link to find the appropriate matching occupation.

After completing both steps, the **Occupation Title** and **Occupation Code** should populate automatically.

Select the “Next” button.

The image shows a screenshot of a web form titled "Ethnic Origin". The form contains two main sections:

- Are you of Hispanic or Latino heritage?** with radio button options for Yes, No, and I do not wish to answer.
- Race - Please check all that apply:** with checkboxes for African American/Black, American Indian/Alaskan Native, Asian, Hawaiian/Other Pacific Islander, White, and I do not wish to answer.

At the bottom right of the form, there are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. The page number "37" is visible in the bottom right corner of the screenshot.

Complete the **Ethnic Origin** section and select the “Next” button.

**Military Service**

Veterans and their spouses may be entitled to State and Federal Benefits. Please answer the following questions.

- Are you a caregiver who is a spouse or family member to a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit?  Yes  No
- Are you a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit?  Yes  No
- Are you currently in the military, a veteran or the spouse of a veteran?  Yes  No
- Are you the Spouse/Dependent of someone in the active-duty military service, National Guard or Reserves who is currently activated?  Yes  No

- \* **Question 1.** Are you within 24 months of retirement or 12 months of discharge from the military (Transitioning Service Member)?  Yes  No
- \* **Question 2.** Have you served on active duty in the armed forces and were discharged or released from such service under conditions other than dishonorable?  Yes  No
- \* **Question 3.** Are you the spouse of a veteran who has a total service connected disability, is Missing In Action, captured in the line of duty by a hostile force, is a Prisoner Of War or who died from a service connected disability?  Yes  No
- \* **Question 4.** Are you now or have you served in a National Guard or Reserve unit that was called to or is on Active Duty due to armed conflict and/or crisis involving national security (Title 10 Activation)?  Yes, I am serving  Yes, I have served  No, I am not serving

Answer all mandatory **Military Service** questions.

For the question, **Are you currently in the military, a veteran or the spouse of a veteran?**, when your individual answers “Yes”, additional veteran questions will populate (see “Question 1”, “Question 2”, and so on). If the answer is “Yes” to any of these additional questions, another set of questions may populate to gather more information. When you select “Yes” to **Question 1**, an additional section titled **Transitioning Service Members** will populate and is required. When you select “Yes” to **Question 2** or **Question 4**, an additional section titled **Veteran Information** will populate and is required. See the next slide for the additional **Veteran Information** required.

Select the “Next” button when finished with this section.

**Veteran Information**

Please enter the information below about your military service.

Did you serve more than 1 tour of duty?  Yes  No

\* Military Service Begin Date:  (mm/dd/yyyy)

\* Military Service End Date:  (mm/dd/yyyy)

\* Received a Military Campaign Badge:  Yes  No

[\[Combat Veteran Web Site\]](#)

\* Branch of Service:

\* Active in the military reserves:  Yes, I am active in the military  
 No, I am not active in the military  
 Not Specified

\* Most Recent Character of Service Received:

Other Character of Service:

\* Disabled Veteran:

\* Disability Percentage:

\* Homeless Veteran:  Yes  No

Referred by Veteran's Voc Rehab (Chapter 31):  Yes  No

\* Are you currently incarcerated or have you been released from incarceration?  Yes  No  I do not wish to disclose

\* Within the last 12 months, have you been without a paycheck for 27 or more weeks?  Yes  No  Not Sure

Veteran Status: Yes, Eligible Veteran

[\[Obtain DD214\]](#)

Recently Separated (within 3 years): Yes

\* Have you attended a Transition Assistance Program (TAP) Workshop within the last three years?  Yes  No

If applicable, complete the required fields in the **Veteran Information** section (explained in the previous slide).

Public Assistance

Please provide answers to the following questions if any apply within the last 6 months.

- Has your household received Temporary Assistance for Needy Families (TANF) payments?  Yes  No
- Have you been determined eligible for or received Supplemental Nutritional Assistance Programs Assistance (SNAP formerly known as FoodStamps)?  Yes  No
- Have you received General Assistance Payments?  Yes  No
- Have you received Refugee Cash Assistance Payments?  Yes  No
- Have you been supported through the State's Foster Care System?  Yes  No

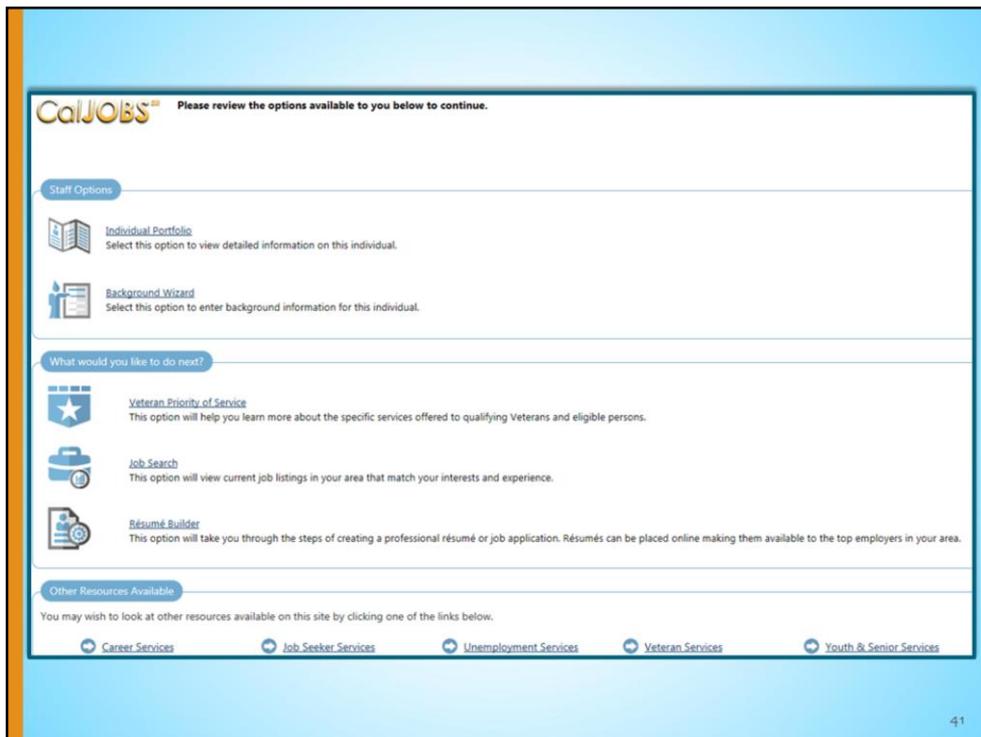
I do not wish to provide household information

- Number of individuals living in your household
- Total income earned within the last 6 months

<< Back
Finish

Next, answer all of the **Public Assistance** questions. If your individual answers “No” to the first 5 questions, an additional 2 mandatory questions populate at the bottom (highlighted box). This section will help determine eligibility for certain program services based on low income.

Once completed, select the “Finish” button and **registration in CalJOBS is complete.**



This page displays after registration is completed.

There are several options shown here: Under **Staff Options**, we can, 1) select the Individual Portfolio link to continue to create a WIOA Program Application for the individual, or 2) continue on and create the Background Wizard.

Below the **What would you like to be next section?** we can select Veteran Priority of Service, Job Search, or create a resume by selecting Resume Builder.

# CalJOBS Business Rules for Title I Application

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Before we get started, there are some important notes to understand about the CalJOBS System. These next 3 slides will provide important information for you to know as you utilize the system for your case management activities.

# CalJOBS Business Rules

## 30-Day Lock-Down

### Application Date

- Cannot be backdated beyond 30 days
- Cannot be greater than today's date

### Eligibility Date

- Cannot precede the application date
- Cannot be greater than today's date



43

The “30-day lock-down” rule:

The **Application Date** is the date a staff member initiates a Title I application so that an individual may receive Title I programs and services. This date cannot be backdated beyond 30-days, nor can it be a future date. For example, staff creating an application on January 31 will be stopped in the system if they attempt to enter an application date that is sooner than January 1 or later than January 31.

The **Eligibility Date** is the date an individual is determined eligible to receive services. This date does not have to be the same as the application date, but it cannot be before the application date or a future date.

## CalJOBS Business Rules

### Partial save = Not enrolled

Check here to allow saving of a partial application

- Incomplete application can be completed at a later date
- Considered **not complete** and **not enrolled**

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When completing a Title I application, staff have the option to partially save an application instead of completing it at that moment if need be.

When this box is checked, an incomplete version of the application is saved and no enrollment records can be created against this application. A partial save allows you to come back and finish the application at a later date/time, however you need to keep in mind the 30-day lockdown feature within the CalJOBS system.

Please note: A *completed* application DOES NOT enroll the individual into the program.

# CalJOBS Business Rules

## Exit Wizard vs. “Next”

### Exit Wizard

Data entry on current screen will not be saved

### “Next” Button

Saves application up to current screen



As you complete the application, you will notice the Exit Wizard link and the “Next” button.

When Exit Wizard is selected, you will exit the application, saving only data prior to the step or current screen. None of the data entered on the current screen will be saved. In order to save entered data you must click “Next”.

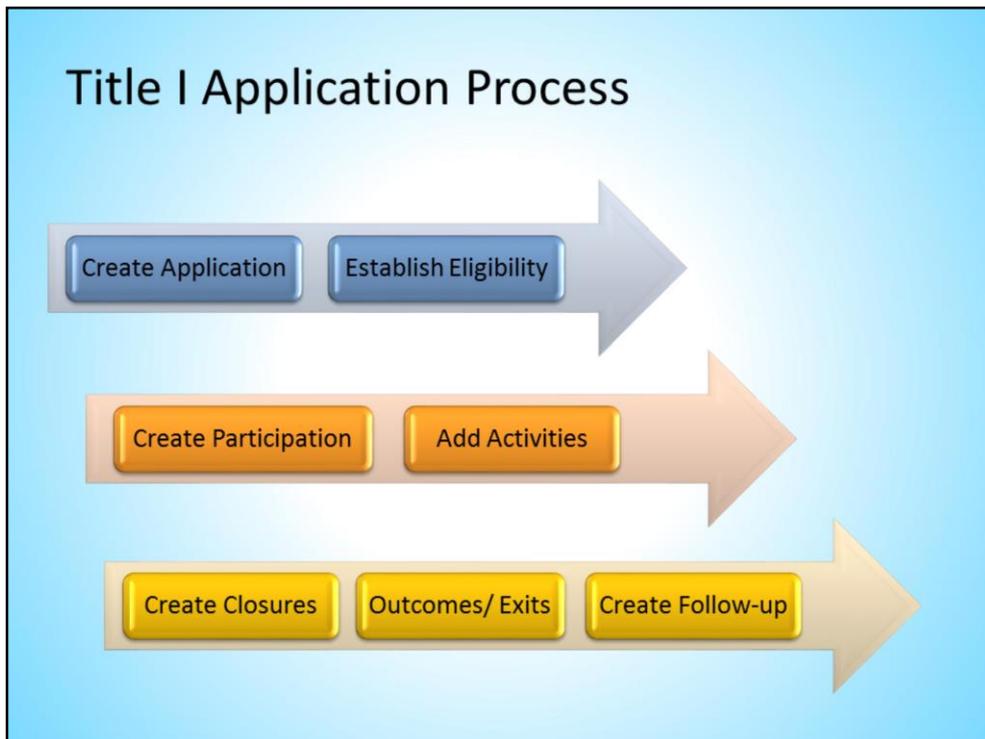
# Completing a Title I Application

46

Now that we've identified a few business rules, we will begin the steps to create a Title I application.

## What is a Title I Application?

- Completing the WIOA Title I Application gives individuals access to a wide range of services available through Title I Workforce Development programs as well as DOL partner programs and special grant programs.
- Staff members complete the application form with required data fields that collect information on the user and establish eligibility for programs.
- A Title I Application is required for all participants in your program and is separate from Individual Registration and the Title III Wagner-Peyser Application in CalJOBS.



This slide presents a “big picture” of the steps that we will cover in these series of PowerPoints.

This module covers the application and eligibility. **CalJOBS Case Management Part I** will cover participation and activities. **Case Management Part II** will cover closures, outcomes/exits, and follow-up.

For training purposes, in this module we will complete an application for an individual eligible to be served with Adult WIOA funds.

# 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

Services for Workforce Staff  
Manage Individuals  
Manage Employers  
Manage Resumés  
Manage Job Orders

CalJOBS™ Welcome to My Staff Workspace Rianna Rose. This page allows you to customize the content you are interested in. Click on a work item, or select another function from the menu on the left hand side.

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

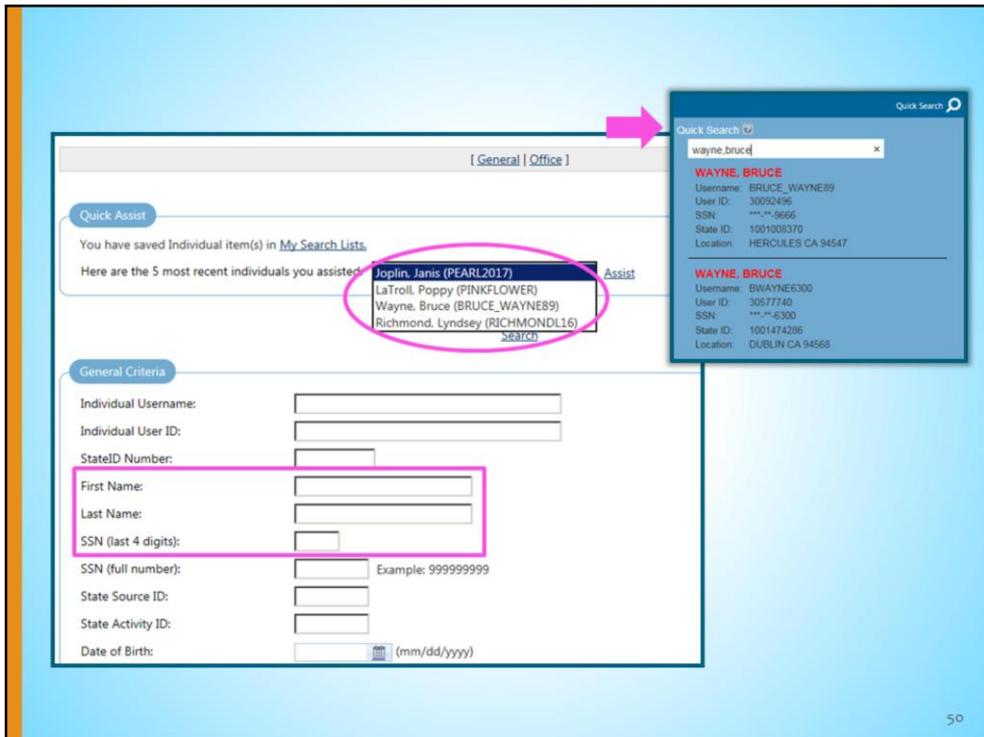
0 New Appointments  
31 Upcoming Events  
Enter the Appointment Center

Create an Individual  
One Case Note to Multiple Individuals  
Assist an Individual

49

After logging into the system, the first page you will see is **My Staff Workspace**. 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 fly-out menu, as shown by the lower arrows.

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 First and Last Name and the last 4 digits of the individual's Social Security Number (SSN). If you have the individual's full SSN, enter it in the designated search box. This will help eliminate the likelihood of opening the wrong person's profile.

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

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

Note the Veteran indicator with the flag in the User Name 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

[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.

# Individual Folders

Currently Managing

FOWLER, KELLIE

**Service Tracking: ON**

Release Individual

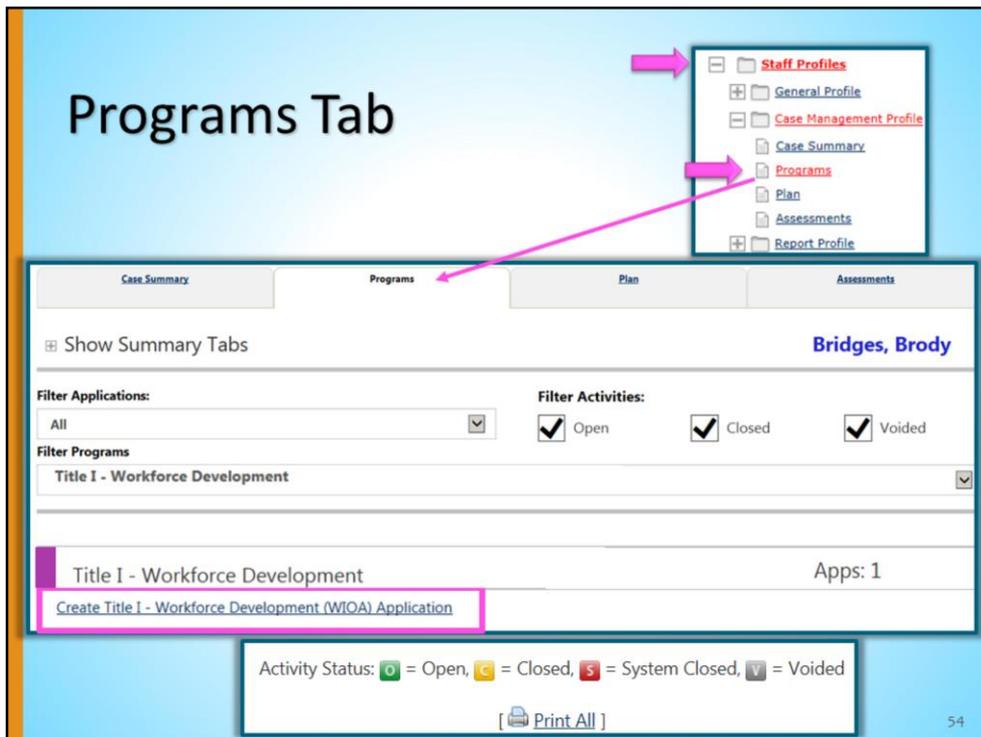
Assist a new Individual

[ Assist an individual | Staff Services ]

- My Individual Profiles
  - Personal Profile
  - General Information
  - Background
  - Activities
  - Memo
  - Search History Profile
  - Self Assessment Profile
  - Job Skills
  - Personal Skills
  - Work Interests
  - Work Values
  - Tools and Technology
  - Multiple
  - Communications Profile
- My Individual Plans
  - Employment Plan Profile
  - Résumés
  - Job Applications
  - Online Application
  - Virtual Recruiter
  - Employment Goals
  - Training Plan Profile
  - Benefits Plan Profile
  - Workforce Innovation and Opportunity Act (WIOA)
  - Trade Adjustment Assistance (TAA)
  - Other Benefits
  - Financial Plan Profile
- Staff Profiles
  - General Profile
  - Summary
  - Case Notes
  - Activities
  - Documents (Staff)
  - Case Management Profile
  - Case Summary
  - Programs
  - Plan
  - Assessments
  - Report Profile

After the **Right to Work Verification** screen, you will see a number of folders near the top of the page. The main folders include: **My Individual Profiles**, **My Individual Plans**, and **Staff Profiles**. Once expanded, these 3 main folders include additional subfolders and tabs.

While assisting an individual, use these folders to navigate through an individual's profile. For example, to access individual's existing, or create a new, résumé, expand the **My Individual Plans** folder, expand the **Employment Plan Profile** subfolder, and then click on the **Résumés** link/tab.



After the **Right to Work Verification** screen, you will navigate to the **Programs Tab**. At the top of the screen, expand the Staff Profiles folder and then the Case Management Profile to access the Programs link. Select the Programs link.

Here you will see a summary of the various programs an individual can be enrolled. Find the ribbon with a purple tab titled, **Title I- Workforce Development**, and select the Create Title I- Workforce Development (WIOA) Application link.

# WIOA Wizard

WIOA Wizard

Start
Contact
Demographics
Veteran
Employment
Education
Eligibility and Grants

---

**Identifying Information**

<b>Username/Login Name:</b>	BRODYBRIDGES	?
<b>User ID:</b>	30707575	
<b>State ID:</b>	1001591430	
<b>User Account Create Date:</b>	2/6/2017 4:06:05 PM	
<b>WIA Converted Application ID:</b>	Not applicable	

**Currently Participating In**

Currently participating in the following programs:

<b>Wagner Peysler:</b>	Application Date: 02/06/2017	
	Participation Date: 02/06/2017	

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This begins the **WIOA Wizard**, a step-by-step data entry process. As you complete the required fields in each step, a green checkmark will appear on the WIOA Wizard.

The first two sections of the **Start** tab generate auto-filled from the information that was entered during registration.

Please note: You may see a “?” mark bubble in some categories of questions throughout the application. When you click on the bubble, a pop-up of information further defining the question or set of questions will appear.

The screenshot displays the 'WIOA Wizard' interface. At the top, a progress bar shows steps: Start, Contact, Demographics, Veteran, Employment, Education, and Eligibility and Grants. The 'Start' step is highlighted in yellow. Below the progress bar, the 'Application/Registration Information' section contains the following fields:

- \* Application Date:** A date input field with '07/31/2017' entered, followed by '(mm/dd/yyyy)' and a 'Today' button.
- Adult Eligibility:** A checked checkbox.
- Adult Eligibility Date:** A date input field with '07/31/2017' entered, followed by '(mm/dd/yyyy)' and a 'Today' button.
- Dislocated Worker Eligibility:** An unchecked checkbox.
- Youth Eligibility:** An unchecked checkbox.
- Incumbent Worker Eligibility:** An unchecked checkbox.

Below this section is the 'Location Information' section with the following fields:

- \* Local Area/Region:** A dropdown menu with 'WIOA Statewide Grant Contractor' selected.
- \* Office Location of Responsibility:** A dropdown menu with 'Your Organization Office' selected.
- \* Office Location:** A dropdown menu with 'Your Organization Office' selected.
- Agency Code:** A text input field with a blue link for 'Agency Code Search' to its right.

At the bottom right of the form is an orange 'Next >>' button. The page number '56' is visible in the bottom right corner.

**All of the elements on this part of the screen are extremely important, as they directly affect the ability to enroll into activities by grant later in the process.**

**Application date** – The system will only accept an application date that is within the last **30** days. As mentioned in the CalJOBS System Business Rules section of this training, this is the 30-day lockdown. In addition, the application date cannot be a future date.

**Eligibility Category** – Choose the appropriate eligibility category based on your contract, grant and funding stream. For today’s training purposes we are choosing “Adult”.

**Eligibility Date** – The selected eligibility type date (i.e., Adult) cannot precede the Application Date, nor can it be a future date.

**Location Information** – Be sure to choose your Office/Organization from the first dropdown. Then choose your office from the dropdown next to “Office Location of Responsibility.” The third dropdown will then autofill.

If your Area uses Agency Codes, select the [Agency Code Search](#) link to search for the appropriate code.

Select the “Next” button at the bottom of the page to save the information entered and move forward in the application.

**WIOA Wizard**

Start **Contact** Demographics Veteran Employment

Education Public Assistance Barriers Family Income Miscellaneous

Eligibility and Grants

**Contact Information**

\* **First Name:**

**Middle Initial:**

\* **Last Name (including suffix e.g. Jr., Sr., PhD, etc.):**

\* **SSN (do not enter dashes. eg: 999999999):**  [\[Edit SSN\]](#)

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

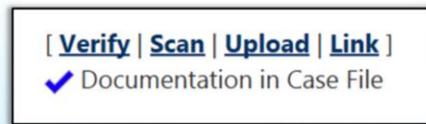
57

The next step of the Wizard is the **Contact** tab. The Title I application process involves reviewing and verifying a lot of information that was entered during individual registration. Staff must ensure the information is up to date and accurate.

After confirming that the information in each required field is correct, you may select the Verify link as needed.

## Verify Links

- Allow you to verify documents
- Check your organization's business rules
- System may default to "Documentation in Case File"



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Let's take this time to talk about the Verify links within the application.

CalJOBS allows you to document data elements, per your local organization business rules, via the Verify links. If you choose to use a Verify link, please be sure to have the document in the physical case file or uploaded to CalJOBS.

If you do not choose to verify an item, the system will default to "Documentation in Case File" for that data element.

Current Address

\* Address 1:

Address 2:

City:

\* State:

\* County/Parish:

\* Zip Code:  [\[ Find Zip Code \]](#)

\* Country:

[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#)

\* Primary Phone Number:    Ext.

\* Primary Phone Type:

Alternative Phone:    Ext.

Alternative Phone Type:

Fax:

Email:

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Continuing with the **Contact** step of the application, review the information entered under **Current Address** to ensure that it is correct.

The image shows a screenshot of a web form titled "Mailing Address". At the top left of the form area, there is a blue pill-shaped button with the text "Mailing Address". Below this, there are two unchecked checkboxes: "Staff has reviewed this address for correctness" and "Check here to use the residential address information". The form contains several required fields, each with a red asterisk: "Mail Address 1" (text input with "555 Sunshine Ln"), "Mail Address 2" (empty text input), "Mailing City" (text input with "Redding"), "Mailing State" (dropdown menu with "California" selected), "Mailing Zip/Postal Code" (text input with "96001"), and "Mailing Country" (dropdown menu with "United States" selected). The form is set against a light blue background with a thin orange border on the left side. In the bottom right corner of the page, the number "60" is visible.

Moving on, for the **Mailing Address** section there is an option to select if the mailing address is the same as the residential address. If it is the same, check the “Check here to use the residential address information” box. The system will then attempt to standardize the address.

If the Mailing Address is not the same as the residential address, enter the correct **Mailing Address**.

If the address does not standardize, staff may check the box labeled, “Staff has reviewed this address for correctness.”

The screenshot shows a web application interface with a light blue background and a white content area. At the top, there is a section titled "Alternate Contacts" with a sub-link "Manage Alternate Contacts". Below this is a "Contact List" section that currently displays "No Contacts for individual". The next section is "Case Assignment", which shows "Current Case Manager:" followed by a text box. To the right, it states "Case currently Not Assigned to a Case Manager" and provides three links: "Assign Case Manager", "Assign Me", and "Remove Case Manager Assignment", with a text box below them. At the bottom left, there is a checkbox labeled "Check here to allow saving of a partial application" and a link "Exit Wizard". At the bottom right, there are two buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. A small number "61" is visible in the bottom right corner of the page.

Finishing up the **Contact** tab, if the individual has one or more alternate contacts, it is helpful to add this for the purposes of locating individuals or obtaining updated information. To add an alternate contact, select the [Manage Alternate Contacts](#) link.

Please note the [Exit Wizard](#) link at the bottom of the page . If you select this link, the system will populate a message. If you select “OK” to the message, the information on the current page will not be saved; however, all previous application pages will be saved.

When this screen is completed, select the “Next” button to move forward.

WIOA Wizard

Start Contact **Demographics** Veteran Employment Education Public Assistance

Barriers Family Income Miscellaneous Eligibility and Grants

Demographic Information

**\* Date of Birth:**  [Edit Date of Birth](#)  
 [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]  
 ✓ Documentation in Case File

**Age at Earliest Eligibility:** 23 (Today's Age: 23)

**\* Gender:**  Male  Female  Did not self-identify

[Selective Service Website](#)

**Registered for the Selective Service:**    
 [ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]  
 ✓ Documentation in Case File

**Selective Service Registration Number:**

**Selective Service Registration Date:**

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The next step of the application is the **Demographic** tab. Most of this information auto-fills from individual registration. Review all fields for accuracy.

Please note: Individuals who are required to register for Selective Service must have done so in order to receive Title I-funded services. To easily verify whether or not an individual has registered, use the Selective Service Website link to open the site and find the information.

**• Authorization to Work in US:**    
[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]  
✓ Documentation in Case File

**• Considered to be of Hispanic heritage:**  Yes  No

**• Race - Ethnicity:**

- African American/Black
- American Indian/Alaskan Native
- Asian
- Hawaiian/Other Pacific Islander
- White
- I do not wish to answer.

**• Considered to have a disability:**  Yes  No  Participant did not self-identify  Chose not to identify  
[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

**Category of Disability :**

- No disability
- Physical/Chronic Health Condition
- Physical/Mobility Impairment
- Mental or Psychiatric Disability
- Vision-related disability
- Hearing-related disability
- Learning Disability
- Cognitive/Intellectual disability
- Participant did not disclose type of disability

[Next >>](#)

This screen shows the rest of the **Demographic Information** screen. Review all fields for accuracy, and select the “Next” button.

WIOA Wizard

Start Contact Demographics **Veteran** Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

Transitioning Service Member

• **Transitioning Service Member:**  Yes  No

**Type of Transitioning Service Member:** None Selected

**Estimated Discharge Date:** (mm/dd/yyyy) Today

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Moving on to the **Veterans** tab. If your individual is not a Transitioning Service Member, select the “No” radio button. If they are a Transitioning Service Member, select the “Yes” radio button and complete the subsequent fields that generate as mandatory.

For our training purposes, our individual is not a Transitioning Service Member.

**WIOA Wizard**

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

---

**Veteran Information**

**\*Eligible Veteran Status:**

Yes <= 180 days  
 Yes, Eligible Veteran  
 Yes, Other Eligible Person  
 No

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

**Obtain DD214**

**\*Served more than 1 tour of duty:**  Yes  No

**\*Military Service Entry Date:**  (mm/dd/yyyy) 

**\*Military Service Discharge Date:**  (mm/dd/yyyy) 

**\*Disabled Veteran:**  

**Homeless Veteran:**  Yes  No

**Received Services from Veterans Vocational Rehabilitation:**  Yes  No  Unknown

**Next >>**

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If this individual is a Veteran or Other Eligible Person, select the corresponding radio button and enter any required information. Some information may have auto-filled from individual registration; please check for accuracy. If your individual is not a Veteran or Eligible Person, select the “No” radio button.

Select the “Next” button to continue.

**WIOA Wizard**

Start Contact Demographics Veteran **Employment** Education Public Assistance

Barriers Family Income Miscellaneous Eligibility and Grants

---

**Employment Information**

• **Employment Status:**  [ Verify | Scan | Upload | Link ]

• **If Employed, Individual is Under-Employed:**  Yes  No  Not Applicable

• **Unemployment Eligibility Status:** 

- None Selected
- Neither Claimant nor Exhaustee
- Claimant
- Exhaustee

**UI Referred By Status:** 

- None Selected
- WPRS
- REA
- RESEA
- Not Applicable

**Claimant has been exempted from work search:**  Yes  No

**Date claimant was exempted from work search:**  Today

**Unemployment Compensation Verify** [ Verify | Scan | Upload | Link ]

Next, is the **Employment** tab. Answer the required fields in the **Employment Information** section. If you select that the individual's **Unemployment Eligibility Status** is "Claimant" or "Exhaustee," the system requires that you must complete the **UI Referred By Status** and the **Claimant has been exempted from work search** fields.

**WIOA Wizard**

Start  Contact  Demographics  Veteran  **Employment**  Education  Public Assistance

Barriers  Family Income  Miscellaneous  Eligibility and Grants

**Number of Weeks Unemployed:**  ←

**Long-term Unemployed (27 or more consecutive weeks):**  Yes  No

*Please enter the Wage and Onet Code for all applicants with current/previous employment.*

**Current or Most Recent Hourly Rate of Pay:**

[Search Onet](#)

**Occupation of Most Recent Employment Prior to WIA/WIOA participation (if available):** -

**Employment History**

Company Name	City	Job Title (Occupation)	Start/End Dates	Action
No Employment History				

[\[Add Employment History\]](#)

[Next >>](#)

67

Although there is not a red asterisk next to the field **Number of Weeks Unemployed**, it must be completed with a value greater than “0” to move forward in the application.

Please note: On some occasions, the **Long-term Unemployed** field may have a red asterisk, indicating that it is required.

If the individual did not enter employment history during registration, it can optionally be entered here by selecting the Add Employment History link.

If you choose to not enter employment history and all fields are complete, select the “Next” button to continue.

# Adding Employment History

**Employer**

• Employer Name:

Address:

Store / Location Number:

Zip Code:

• City:

• State / Province:

• Country:

**Job Title**

Please enter a job title below for this employment history. As you are entering the job title, you may see a list of common job titles similar to what you are entering. If you see your job title in the list, select it.

• Job title:

**Occupation**

Please select the occupation that best matches your job title. You may either select from the Suggested Occupations drop-down list, which is populated based on the job title above, or you can search for an occupation.

Suggested occupation(s):

[ [Search for an occupation](#) ]

• Occupation title: Human Resources Assistants, Except Payroll and Timekeeping

Occupation code: 43416100

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When the [Add Employment History](#) link is selected, the next screen asks for the **Employer**, **Job Title**, and **Occupation** information. When you start typing the employer name in the first field, a dropdown of choices may appear. Be sure to choose the correct location if there are multiple options.

If the employer information does not auto-populate, simply type their information in the fields provided.

Enter the **Job Title** in the space provided. As you are entering the job title, the system may try to match your entry to an established list of job titles already entered in the system. If you see your job title in this list, select it. If you don't see your job title on the list, continue to type in your appropriate title.

After selecting your **Job Title**, the page will reload to display recommended **Occupation Titles** based upon your job title. If you see your occupation listed in the dropdown menu, select it. If you do not see your occupation listed, click the [Search for an occupation](#) link to find the correct occupation.

Complete the other required sections.

**Position**

- Type of employment: Regular
- Full or part-time: Full Time (30 Hours or More)
- Gross Salary: \$ 18.00
- Salary is based upon: Hour
- Date you began work: 02/03/2014 (mm/dd/yyyy)
- Last day worked: 01/14/2017 (mm/dd/yyyy)

You indicated the date as January 14, 2017

Currently Employed

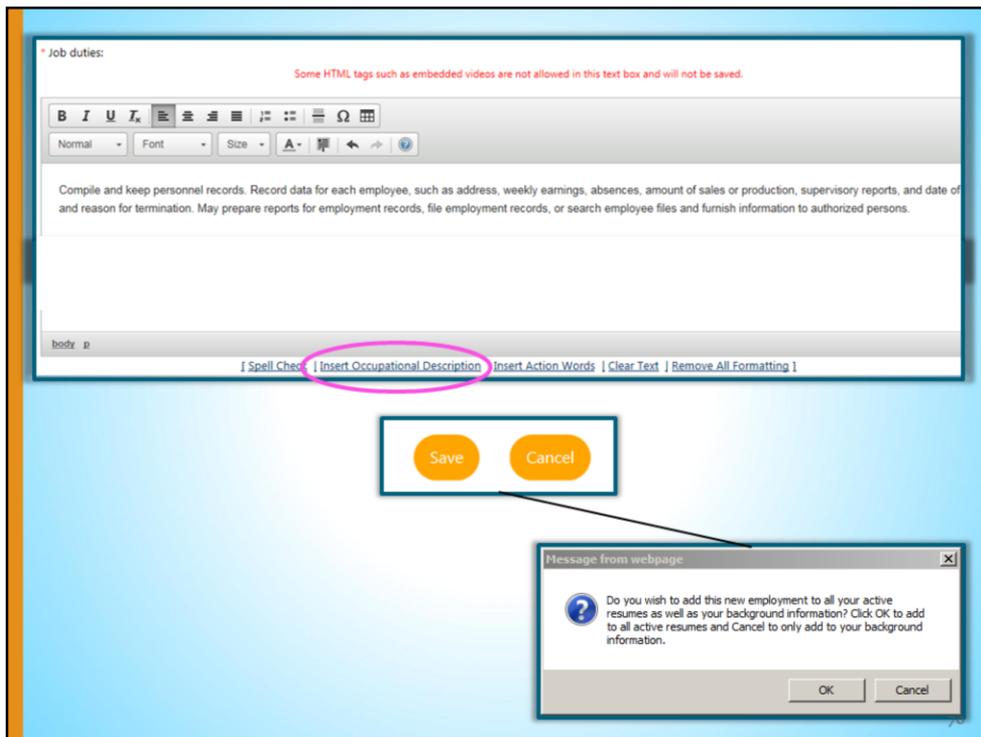
Duration of Job: 2 Year(s) 11 Month(s)

- Reason for Separation: Layoff

Additional information on reason for separation:

(120 characters max)

Complete the required **Position** information.



Complete the Job duties summary. Job duties can either be typed in, or selected from the [Insert Occupational Description](#) link at the bottom of the text box.

Once these fields are completed, select the "Save" button to continue.

After you select "Save", you will receive a pop-up message. Click **OK** if you wish to add this employment information to the individual's Resume and Background information. Click **Cancel** to only add to the Background information.

You will also receive additional pop-up messages asking if you would like to add the skills, technical skills, and tools associated with this employment history to the individual's existing skills list. Click **OK** if yes; otherwise click **Cancel**.

# Added Employment History

Employment History				
Company Name	Location	Job Title (Occupation)	Start/End Dates	Action
Target	1280 Dana Dr Redding, CA	Administrative Assistant (Human Resources Assistants, Except Payroll and Timekeeping)	02/03/2014 - 01/14/2017	<a href="#">Edit</a> <a href="#">Delete</a>

Page 1 of 1 Rows: 25

[\[Add Employment History\]](#)



A table then populates with the employment information. Select the Add Employment History link to add additional employment experience.

Once employment information is entered, select the "Next" button to continue.

The screenshot displays a progress bar at the top with the following tabs: Start, Contact, Demographics, Veteran, Employment, and Education. The 'Education' tab is highlighted in yellow and has a warning icon. Below the progress bar, there are two rows of sub-tabs: 'Public Assistance', 'Barriers', 'Family Income', 'Miscellaneous', and 'Eligibility and Grants'. The 'Education' sub-tab is also highlighted in yellow.

The main content area is titled 'WIOA Education Information' and contains the following fields:

- Highest School Grade Completed:** 12th Grade Completed
- High School Diploma or equivalent received:**  Yes  No
- Highest Education Level completed:** Attained an Associate's degree
- School Status:** Not attending school: Secondary School Graduate or has a recognized equivalent

Each field has a 'Verify | Scan | Upload | Link' button below it.

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Next, complete the required fields in the **WIOA Educational Information** of the **Education** tab.

The screenshot shows a web form titled "Education Partner Services" within a larger application window. At the top, a progress bar indicates the user's current position in a multi-step process. The steps are: Start (checked), Contact (checked), Demographics (checked), Veteran (checked), Employment (checked), and Education (highlighted in yellow with a yellow arrow). Below the progress bar, a secondary row of steps is shown: Public Assistance (unchecked), Barriers (unchecked), Family Income (unchecked), Miscellaneous (unchecked), and Eligibility and Grants (unchecked). The main content area of the form contains several sections with radio button options:

- Receiving services from Adult Education (WIOA Title II):**  Yes  No  Did not self-identify
- Receiving services from YouthBuild:**  Yes  No  Did not self-identify  
YouthBuild Grant Number (If unknown, enter all 9s.):   
Format: AA-99999-99-99-A-99
- Receiving services from Job Corps:**  Yes  No  Did not self-identify
- Receiving Services from Vocational Education (Carl Perkins):**  Yes  No  Did not self-identify
- Individualized Education Program Participant:**

At the bottom of the form, there are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. The page number "73" is visible in the bottom right corner.

After completing the required fields in the **WIOA Educational Information** section, complete the required fields in the **Education Partner Services** section.

Select the "Next" button to continue.

**WIOA Wizard**

Start Contact Demographics Veteran Employment Education

Public Assistance Basics Family Income Miscellaneous Eligibility and Grants

**Public Assistance**

*Individual or member of a family that is receiving, or in the past 6 months has received, the following:*

- Temporary Assistance for Needy Families (TANF):  Yes  No  
 TANF Recipient:  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)
- Supplemental Security Income (SSI):  Yes  No  
 SSI Recipient:  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)
- General Assistance (GA):  Yes  No  
 GA Recipient:  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)
- Supplemental Nutrition Assistance Program (SNAP):  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)
- Refugee Cash Assistance (RCA):  Yes  No  
 RCA Recipient:  Applicant  Family Member  Not Applicable/Unknown  
[\[ Verify | Scan | Upload | Link \]](#)

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On the **Public Assistance** tab, complete the **Public Assistance** questions. The questions in this category pertain to the individual *or* a family member of the individual.

If you select the “Yes” radio button for any question, the sub-question located directly below is required to clarify who is receiving that public assistance: the applicant or a family member. In this case, the “Not Applicable/Unknown” radio button is not an acceptable selection, and the system will not allow you to proceed. For example: see the **General Assistance (GA)** question in this slide.

WIOA Wizard

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

*Individual receives, or in the last 6 months, received:*

- **Social Security Disability Insurance Income (SSDI):**  Yes  No

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

*Individual currently meets the following:*

- **Receiving services under SNAP Employment & Training Program:**  Yes  No
- **Receiving, or has been notified will receive, Pell Grant:**  Yes  No
- **Ticket to Work Holder issued by the Social Security Administration:**  Yes  No

<< Back Next >>

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These final questions on the **Public Assistance** page pertain to the individual only.

When the page is completed, select the “Next” button.

**WIOA Wizard**

Start    Contact    Demographics    Veteran    Employment    Education

Public Assistance    **Barriers**    Family Income    Miscellaneous    Eligibility and Grants

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**Individual Barriers**

- **English language learner**       Yes  No

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]
- **Basic Skills Deficient/Low Levels of Literacy**       Yes  No

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]
- Add//View Basic skills scores:**      [Click Here](#)
- **Homeless:**       Yes  No

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]
- **Ex-Offender - individual has been arrested/convicted of a crime:**       Yes  No  Did not disclose

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

On the **Barriers** tab, complete the **Individual Barriers** questions.

**WIOA Wizard**

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

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**Barriers to Employment**

Disabled:  No

• Displaced Homemaker:  [| Verify | Scan | Upload | Link |](#)

Meets long term unemployment definition:

• Within 2 years of exhausting TANF lifetime eligibility:  Yes  No [| Verify | Scan | Upload | Link |](#)

Older individual (age 55 and older):  No

• Hawaiian Native:  Yes  No  
*Hawaiian or Pacific Islander is not selected as a Race for this individual. Please update the Demographics section if this is not accurate.*

• American Indian/Alaskan Native:  No

• Single Parent (including single pregnant women):  Yes  No  Participant did not self-identify

• Cultural Barriers:  Yes  No  Participant did not self-identify

• Eligible Migrant Season Farmworker as defined in WIOA Sec 167(i):  Yes  No

• Meets Governor's special barriers to employment:  Yes  No

After completing the **Individual Barriers** questions, complete the **Barriers to Employment** questions. When the page is completed, select the “Next” button.

WIOA Wizard

Start Contact Demographics Veteran Employment Education Public Assistance

Barriers **Family Income** Miscellaneous Eligibility and Grants

**Family Income**

• Due to the individual's disability, they qualify as a Family of 1:  Yes  No

Low income has already been established based upon previous entries. Family size and income are optional.

Family Size:  [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

Annualized Family Income:  [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

[Income Table](#)

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Next, please note the text in red on the **Family Income** section of the **Family Income** tab.

In this instance, low income has already been established based on previous entries in the application (Public Assistance tab). **Family Size** and **Annualized Family Income** is not required. Had low income not been established, **Family Size** and **Annualized Family Income** are required entries.

When the page is completed, select the “Next” button.

The screenshot displays the WIOA Wizard interface. At the top, a progress bar shows the following steps: Start, Contact, Demographics, Veteran, Employment, and Education, all marked with green checkmarks. Below this, a second progress bar shows Public Assistance, Barriers, Family Income, Miscellaneous, and Eligibility and Grants. The Miscellaneous step is highlighted in yellow with a warning icon, while Eligibility and Grants is marked with a grey 'X'. The main content area is titled 'Barriers' and contains the following questions:

- **Gang Status:** A dropdown menu showing 'N/A'.
- **Youth of Incarcerated Parent:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- **Parole Number:** An empty text input field.
- **Substance Abuse:** Radio buttons for 'Yes' and 'No', with 'No' selected.

At the bottom of the form, there are two orange buttons: '<< Back' and 'Next >>'. The 'Next >>' button is circled in pink. The page number '79' is located in the bottom right corner.

The **Miscellaneous** tab contains a few additional **Barriers** questions. Answer the required questions, and select the “Next” button to continue.

**WIOA Wizard**

Start    Contact    Demographics    Veteran    Employment    Education

Public Assistance    Barriers    Family Income    Miscellaneous    Eligibility and Grants

Applicant Eligibility

**Applicant meets the definition for low income:**    Yes

**Income Table:**    [Income Table](#)

Program	Eligible	Priority	Calculated Exception/Limitation	Reason(s) Not Eligible	Action
Adult	Yes	VET, LI			<input type="checkbox"/> Inactive
Dislocated Worker	Undetermined			No DW Eligibility Date.	<input type="checkbox"/> Inactive
Youth	Undetermined			No Youth Eligibility Date.	<input type="checkbox"/> Inactive

VET = Veteran, BSD = Basic Skills Deficient, PA = Public Assistance, LI = Low Income, SLP = Additional Priorities

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Finally, the last step of the application, **Eligibility and Grants**, is very important.

**Applicant Eligibility** table –The green highlight(s) represent the program(s) the individual is eligible for based on all of the entries made in the registration and application to this point. According to the information entered in the system, the individual is not eligible for those programs highlighted in gray/white. If the individual does not show as eligible for a desired program, the application entries should be reviewed to ensure that all questions have been answered appropriately.

The “Priority” column provides the barriers/characteristics of the client that may be used to determine if they qualify for priority of service, but it does not automatically qualify them for priority of service.

Please note: if you select the “Inactive” box in the “Action” column of this table, you will *NOT* have access to that corresponding program, or funding stream, when adding activity codes for your individual.

**WIOA Wizard**

Start      Contact      Demographics      Veteran      Employment      Education

Public Assistance      Barriers      Family Income      Miscellaneous      Eligibility and Grants

WIOA Grant Eligibility

*Changes in this section will create immediate updates to the record.*

**Incumbent Worker Eligibility:**       Yes     No     Not Applicable       Inactive  
 Applicant does not meet the requirements for Incumbent Worker eligibility.

**National Dislocated Worker Grant NDWG:**       Yes     No     Not Applicable  
 Applicant does not meet the requirements for NDWG eligibility.

**Statewide Adult Eligibility:**       Yes     No     Not Applicable       Inactive

**Statewide Dislocated Worker Eligibility:**       Yes     No     Not Applicable       Inactive  
 Applicant does not meet the requirements for Statewide Dislocated Worker eligibility.

**Statewide Youth Eligibility:**       Yes     No     Not Applicable       Inactive  
 Applicant does not meet the requirements for Statewide Youth eligibility.

**Statewide Rapid Response Additional Assistance Eligibility:**       Yes     No     Not Applicable       Inactive  
 Applicant does not meet the requirements for Statewide Rapid Response Additional Assistance eligibility.

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The **WIOA Grant Eligibility** section is crucial for funding and reporting when serving individuals with WIOA special grants. This section displays possible state and national WIOA grant eligibilities. For training purposes, “Statewide Adult” was chosen in this slide.

Be sure to select “Yes” for every WIOA Grant type that you want to access for this individual and program. **If the grants are not checked here, they will not show up later as funding options and you will not be able to properly enroll your participants into your program.**

**WIOA Wizard**

Start  Contact  Demographics  Veteran  Employment  Education

Public Assistance  Barriers  Family Income  Miscellaneous  Eligibility and Grants

**Non-WIOA Grants**

**Non-WIOA Special Grants:**  Yes  No  Not Applicable  Inactive

**Local Funded Grants:**  Yes  No  Not Applicable  Inactive

**Grants**

Grant Type	Grant ID	Grant Name	ETA/Local Grant Code	Date Added	Action
No records found					

[View Available Grants](#)

**Grants**

No grants have been added.

Select from the list of available grants.

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Adult	377	1096 - High Road Training Partnerships	NA		<a href="#">Add</a>

The **Non-WIOA Grant** section applies to those entities who receive Non-WIOA grant monies (i.e. Prop 39 and AB2060). If you are *not* providing services to this individual using a Non-WIOA Special Grant, leave the options as “Not Applicable”.

Next, the **Grants** section is very important if you are serving this individual with a WIOA special grant. Under the **Grants** section, select the View Available Grants link, and a table will populate showing the grants that are available to your area/location. To attach a grant to this application, locate your grant, then select the Add link on the far right. If you are not serving your individual with a WIOA special grant, skip this section.

If you want to select a grant but there are no grants listed here, please keep in mind the following must be accurate:

- Grant must be active
- Grant code is associated to the local area, based on the LWIA/Region value
- Staff must have access by Eligibility to associate grant types to applications
- The Eligibility Date must fall between the begin/end dates associated to the grant code records

In addition, it may be because the previous section, **WIOA Grant Eligibility**, may not

have been completed correctly.

The screenshot displays a web application interface with the following components:

- Grants Table:** A table with columns: Grant Type, Grant ID, Grant Name, Local Grant Code, Date Added, and Action. It contains one row: Statewide Adult, 377, 1096 - High Road Training Partnerships, NA, and an [Add](#) button.
- Staff Eligibility Information Section:**
  - Current Case Manager:** A label followed by the text "Case currently Not Assigned to a Case Manager" and three links: [Assign Case Manager](#), [Assign Me](#), and [Remove Case Manager Assignment](#). Below these links is a text input field.
  - Comments:** A label followed by a large text area and a [\[ Spell Check \]](#) link.
  - Navigation:** Links for [\[ Add a new Case Note \]](#) and [\[ Show Filter Criteria \]](#).
  - Buttons:** A row of three buttons: "<< Back", "Next >>", and "Finish". The "Finish" button is circled in pink.
- Table at the bottom:** A table with columns: ID, Create Date, Subject, and Action. The content below the columns is "No data found."
- Page Number:** "83" is located in the bottom right corner.

If [Add](#) is selected, another table will populate that lists the chosen grant (the one chosen here is just an example). The grants that are selected and shown in the **Grants** table will be available as an option when adding an activity code for a service provided.

If desired, complete the **Staff Eligibility Information** fields. Finally, select the “Finish” button to complete the application.

Note: if you select the “Next” button, you will be routed directly to create Participant for this individual.

The screenshot shows a software interface with a light blue header and a white main area. At the top, there are four tabs: 'Case Summary', 'Programs', 'Plan', and 'Assessments'. Below the tabs, there is a section for 'Show Summary Tabs' and a user name 'Bridges, Brody'. There are two filter sections: 'Filter Applications:' with a dropdown set to 'All', and 'Filter Activities:' with checkboxes for 'Open', 'Closed', and 'Voided', all of which are checked. Below these is a 'Filter Programs' dropdown set to 'Title I - Workforce Development'. A purple bar highlights the selected program, showing 'Title I - Workforce Development' and 'Apps: 1'. Below this is a link: 'Create Title I - Workforce Development (WIOA) Application'. A gray ribbon highlights a specific application: 'WIOA #15696306 - Complete'. Below the ribbon is a table with application details:

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

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You will now see the newly completed Title I application. At this point, eligibility for your program has been established, *however*, this individual is **not** yet enrolled in your program.

Note there is a hyperlink within the gray ribbon that includes the application type, number and status (complete, incomplete, or case closed).

The rest of the gray ribbon includes a summary which identifies the location that completed the application, open/total activities, the application date, participation date, and closure and exit dates.

# Youth Application Differences

The screenshot shows the 'Start' tab of the WIOA Wizard. The 'Application/Registration Information' section contains the following fields:

- Application Date:** 02/28/2017 (mm/dd/yyyy) Today
- Incumbent Worker Eligibility:**
- Adult Eligibility:**
- Dislocated Worker Eligibility:**
- Youth Eligibility:**  (indicated by a pink arrow)
- Youth Eligibility Date:** 02/28/2017 (mm/dd/yyyy) Today

If you are completing an application for a participant with Youth eligibility, there are a few notable differences when completing a Title I program application.

The first difference to note is at the beginning of the WIOA Wizard, on the **Start** tab. You will mark the box labeled **Youth Eligibility** and enter the appropriate date in the **Youth Eligibility Date** box.

# Youth Application Differences

The screenshot shows a web form titled "Education" with a sub-section "Youth Eligibility Education Information". The form contains several fields and questions:

- Youth Eligibility Date:** 2/28/2017
- Age for compulsory school attendance:** 17
- Most Recent Date Attended Secondary School:** (empty text box)
- Within compulsory school age and did not attend the most recent complete school year calendar quarter (use most recent date attended secondary school):** Radio buttons for Yes and No, with No selected.
- Did not Attend (compulsory age):** Links for Verify, Scan, Upload, and Link.
- Has secondary school diploma/equivalent at Youth Program eligibility?** Radio buttons for Yes and No.
- School Status at Youth Program eligibility:** A dropdown menu currently showing "None Selected". A pink arrow points from this dropdown to a separate window showing a list of options: "None Selected", "In-school: Secondary School or less", "In-school: Alternative School", "In-school: post Secondary School", "Not attending school or Secondary School Dropout", "Not attending school: Secondary School Graduate or has a recognized equivalent", and "Not attending school: within age of compulsory school attendance".
- (WIOA) Attending any School (used for In-School/Out-of-School determination):** A dropdown menu currently showing "None Selected".

At the bottom right of the dropdown menu, the number "86" is visible.

The next step you will see a difference is on the **Education** tab. There is a whole unique section of questions: the **Youth Eligibility Education Information**. Here, some of the information will be auto-populated based on previous entries, but there are a couple required questions.

# Youth Application Differences

Public Assistance

**Individual** currently meets the following:

- Foster Child (State or local payments are made for applicant):  Yes  No  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)
- Youth currently living in a high-poverty area:  Yes  No  Information Not Provided  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)
- Youth currently receives, or is eligible to receive, free or reduced lunch under the Richard B. Russell National School Lunch Act:  Yes  No  Information Not Provided  
[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)
- Receiving services under SNAP Employment & Training Program:  Yes  No  Unknown
- Receiving, or has been notified will receive, Pell Grant:  Yes  No  Unknown
- Ticket to Work Holder issued by the Social Security Administration:  Yes  No  Unknown

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On the **Public Assistance** tab, there are a few Youth specific questions in the *Individual currently meets the following* fields.

# Youth Application Differences

**Barriers**

**Individual Barriers**

- English language learner  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)
- High School drop out (WIOA Definition): No
- Not attending school; within age of compulsory school attendance: No
- Basic Skills Deficient/Low Levels of Literacy  Yes  No  
[\[ Verify | Scan | Upload \]](#)
- Add//View Basic skills scores: [Click Here](#)
- Homeless:  Yes  No  
[\[ Verify | Scan | Upload \]](#)
- Runaway:  Yes  No  
[\[ Verify | Scan | Upload \]](#)
- Youth in, or aged out of, Foster Care:    
[\[ Verify | Scan | Upload \]](#)
- Ex-Offender - individual has been arrested/convicted of a crime:  Yes  No  Did not disclose  
[\[ Verify | Scan | Upload | Link \]](#)
- Pregnant/Parenting youth:  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)
- Youth Requires Additional Assistance to complete an educational program or to secure/hold employment:  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)
- Out-of-Home Placement:  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)
- Eligible under Section 477 of the Social Security Act:  Yes  No  
[\[ Verify | Scan | Upload | Link \]](#)

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There are also some Youth specific fields within the **Barriers** tab, in the **Individual Barriers** section.

# Youth Application Differences

Eligibility and Grants

Applicant Eligibility

Income Table: [Income Table](#)

Youth applicant meets low income based upon living in a high poverty area or free/reduced school lunch: Yes

Program	Eligible	Priority	Calculated Exception/Limit
Adult	Undetermined		
Dislocated Worker	Undetermined		
Youth	Yes, In-school		

VET = Veteran, BSD = Basic Skills Deficient, PA = Public Ass

WIOA Grant Eligibility

Incumbent Worker Eligibility:  Yes  No  Not Applicable  Inactive  
Applicant does not meet the requirements for Incumbent Worker eligibility.

National Dislocated Worker Grant NDWG:  Yes  No  Not Applicable  Inactive  
Applicant does not meet the requirements for NDWG eligibility.

Statewide Adult Eligibility:  Yes  No  Not Applicable  Inactive  
Applicant does not meet the requirements for Statewide Adult eligibility.

Statewide Dislocated Worker Eligibility:  Yes  No  Not Applicable  Inactive  
Applicant does not meet the requirements for Statewide Dislocated Worker eligibility.

Statewide Youth Eligibility:  Yes  No  Not Applicable  Inactive

Statewide Rapid Response Additional Assistance Eligibility:  Yes  No  Not Applicable  Inactive  
Applicant does not meet the requirements for Statewide Rapid Response Additional Assistance eligibility.

You will want to be sure that the Youth program is highlighted in green, showing that the individual is eligible for the Youth program in the **Applicant Eligibility** section

Finally, be sure to select the “Yes” radio button in the **Statewide Youth Eligibility** field in the **WIOA Grant Eligibility** section.

## Objectives Summary

- Reviewed Introduction to CalJOBS
- Completed Individual Registration
- Identified CalJOBS System Business Rules
- Completed a Title I Application

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In this training we:

- Reviewed Introduction to CalJOBS.
- Completed Individual Registration – Entering an individual into the system.
- Identified CalJOBS System Business Rules – Understanding some key points in navigating the Title I application.
- Completed a Title I application – Establishing eligibility for your program.

# Questions



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For any questions concerning this module, please contact the Capacity Building Unit at [CBUTraining@edd.ca.gov](mailto:CBUTraining@edd.ca.gov).