Title Slide
P2E CalJOBS℠ Participant Training Webinar Series
Part 2A: Title I Application and Participation

Slide 2
Housekeeping
Just a few housekeeping items before we dive in:

- As you enter the webinar, please sign in by typing your name and office name in the sign in pod to the left of your screen. If you are joining us as a group, please enter all names.
- Throughout this webinar, you may have questions. If so, please type your question into the Q&A pod labeled Questions to the right of your screen. Simply type your question in the dialogue box at the bottom of the pod. We'll answer questions as we go. We may not get to your question, especially if we need to do some research first. The phone lines have been placed in listen-only mode so you will not be able to ask questions over the phone.
- In the bottom right hand side of the Adobe Connect window you will find the Resources pod.

Slide 3
Agenda
Day 1 – Monday, Sept 23
9:30AM – 11:30AM

- Introduction to CalJOBS and system navigation
- Customization and navigation tips and tricks
- Completing Individual Registration

Slide 4
Agenda
Day 2 – Tuesday, Sept 24
9:30AM – 11:30AM

- Completing the WIOA Title I Program Application
- Creating Participation

LUNCH BREAK
11:30AM-1:00PM
Day 2 – Tuesday, Sept 24
1:00PM – 2:30PM

- Completing the Individual Employment Plan (IEP)
- Adding Activity Codes and Case Notes
- Case Assignment and System Alerts
- Participant Reports

Slide 5
Agenda
Day 3 – Thursday, Sept 26
9:30AM – Noon

- Tracking Credential Attainment and Measureable Skill Gains
- Closing activities and using the Closure Form

- Program Exit and Follow Ups
- Participant Reports

Slide 6
Data Directive and Reporting Requirements Webinar
State funding requirements, capturing and reporting data, P2E activity codes, new data fields, quarterly reports
Friday, September 27, 2019
10:00-11:30 am (PST)
Contact Angela Mendibles to register at angela.mendibles@cwdb.ca.gov

Slide 7
Part 2A Objectives
- Discuss the WIOA Title I Application
- Demonstrate how to complete the Title I Application for P2E
- Discuss Participation/Enrollment
- Demonstrate how to create Participation

Slide 8
WIOA Title I Application

Slide 9
What is the 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 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.

Slide 10
What Data is Collected in the Title I Application?
While much of the information from individual registration pulls into the Title I Application, there are many additional questions that require attention:
- Program eligibility date(s) – Adult, DW, Youth, Incumbent Worker
- Veteran information – Transitioning service member, General Veteran Info.
- Employment information – UI Status, Long term unemployed
- Education information – School status, highest school grade completed
- Public Assistance, Barriers, and Household Income – TANF, GA, ELL, etc.
- Eligibility for WIOA Special Grants and Non-WIOA Special Grants

Slide 11
CalJOBS Business Rules
30-Day Lock-Down
There are some CalJOBS Title I application business rules that are helpful to know about before starting to work and enter data into the application. One of those rules is

the 30-day lock down rule. This ensures data integrity and makes it very important to enter participant data in as real-time as possible.
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.

Slide 12
CalJOBS Business Rules
Partial save = Not enrolled
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.

- Incomplete application can be completed at a later date
- Considered not complete and not enrolled
- We do not recommend using the partial save; simply exit the Wizard and an incomplete application will be saved for you to go back and complete.

Slide 13
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”.

Slide 14
P2E Program Eligibility

- Youth
  - 14 – 24
  - Justice-involved
- Adult
  - 18+
  - Justice-involved

P2E age requirement is 14-24 for youth and 18 and older for adults. Every participant has to either have been or currently is justice-involved. Even though you will be choosing to enroll either as a youth or an adult – there will only be one grant code at the end when enrolled into Non-WIOA program.
Definition of Justice-involved:
The term “justice-involved” is defined in Section 14040(b) of the Unemployment Insurance Code and refers to individuals (adults and juveniles) who are on parole,

probation, mandatory supervision, postrelease community supervision, or are otherwise part of the supervised population as defined in Penal Code §1234(d) and/or under the jurisdiction of a county or the California Department of Corrections and Rehabilitation. This also includes individuals who are on county informal probation, county deferred entry of judgement, or any other county diversion program such as drug courts, veterans courts, community courts or other specialty courts. The term "formerly-incarcerated" is not defined in statute and for purposes of this program includes any individual who has at any time served a custody sentence in any adult or juvenile federal, state, or local detention facility; or in any alternative custody program such as home detention.

Slide 15

Completing a WIOA Title I Application

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

Slide 16

Assisting an Individual

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.

Slide 17

Quick Assist

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.

If you have the individual's full SSN, enter it in the designated search box, Otherwise you can use the First Name, Last Name, and Last 4 SSN, or any other combination of information you have on the individual.

Slide 18

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.

Slide 19

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.

Slide 20

Creating a Title I Application

After the **Right to Work Verification** screen, navigate to the **Programs Tab** to create a Title I application. 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 <u>Create Title I- Workforce Development (WIOA) Application</u> link.

<u>Slide 21</u>

Title I Wizard keeps track of application progress

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. In addition the wheel in the top right corner will progress as you complete each step.

<u>Slide 22</u>

The first section of the **Intro** tab will be auto-filled from the information that was entered during registration.

In the Workforce Innovation and Opportunity Action (WIOA) section, enter the **Application Date**, and enter a date in at least one of the WIOA program options. In our example, we entered a date in the **Adult Eligibility Date** field. You can enter a date for as many programs that the individual eligible for. For P2E, if a participant is 18+ years old then it is recommended to select Adult. Only use the Youth option if they under the age of 18.

Some important things to keep in mind:

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

In our screenshot, this staff member does not have privileges to enter an Incumbent Worker Eligibility Date, as noted by the message in blue. This is an example of the messages and information the system provides as you navigate through completing the application.

You may see a “i” icon in some categories of questions throughout the application. When you click on the information icon, a pop-up of information further defining the question or set of questions will appear.

<u>Slide 23</u>

Still on the **Intro** tab, be sure your Local Workforce Development Board is selected from the **LWDB** dropdown. Then choose your office from the **Office Location** dropdown, and the third dropdown, **Office Location of Responsibility** will then autofill.

If your Area uses Agency Codes, select the <u>Select Agency Code</u> 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.

<u>Slide 24</u>

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.

Ensure that the **Residential Address** information is up to date and edit if necessary. In 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. If the Mailing Address if not the same as the residential address, enter the correct **Mailing Address**.

Slide 25

Verify Links

- Allow you to verify documents
- Check your organization’s business rules
- System may default to “Documentation in Case File”
- 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.

Slide 26

Scan/Upload Links

- Allow you to scan or upload documents to store documentation electronically in CalJOBS
- Check your organization’s business rules
- Let’s take this time to talk about the Scan and Upload links within the application.
- CalJOBS allows you to scan or upload document data elements electronically, per your local organization business rules, via the Scan or Upload links. The Scan link will only work for Area’s who utilize the scanning feature in CalJOBS. This requires additional software and technology.
- The Upload option does not require any additional software or technology. To upload a document in the application, select the Upload link for the verification document you would like to upload.

Slide 27

Scan/Upload Links

After selecting the Upload link, a popup will appear for staff to add a document into the system. After completing the required **Document Tags** field, select the “Browse” button. After selecting the “Browse” button, you will be prompted to upload a file that you have saved somewhere in your computer. Select the file and select the “Open” button. The document will then appear in the **Location** field.

Finally, select the “Save” button to upload the document.

Slide 28

Scan/Upload Links

After uploading a document within the Title I application, the document will appear below the Verify/Scan/Upload/Link section of that data element. Staff can click on the link to the document to view it.

In addition, all documents uploaded for a participant, whether they are added during the application or while adding a case note, are housed in the Documents (Staff) section of the General Profile folder. We will see this in the next slide.

Slide 29

Participant Documents
Within the Staff Profiles, General Profile folder is a link to the clients Documents. After clicking on this link, you will be directed to a table of documents available, if any.

Slide 30
Finishing up the **Contact** tab, in the Phone Information section enter the **Primary Phone Number** and select the **Primary Phone Type** from the drop-down.
The Email Information section is optional.
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 Add New Contact link.
When this screen is completed, select the “Next” button to move forward.

Slide 31
The next step of the application is the **Demographic** tab. Most of this information auto-fills from individual registration. Review all fields for accuracy.

Slide 32
Continuing with the **Demographic** tab, review the 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.
If the **Considered to have a disability** field is “Yes”, additional required questions will populate below.
When this screen is completed, select the “Next” button to move forward.

Slide 33
Moving on to the **Veterans** tab. This information pulls from individual registration, but their current status may have changed. Be sure to enter the appropriate information.
Select the “No” radio button if your individual is not a **Transitioning Service Member**. 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.

Slide 34
Continuing with the Veteran tab, in the **General Veteran Information** section, answer the required fields. Some of the information may have auto-filled from individual registration; please check for accuracy.
If the “Yes<= 180 days” or “Yes, Eligible Veteran” radio button is selected in the **Eligible Veteran Status (WIOA specific)** field, subsequent fields become mandatory (service begin and end dates and disabled veteran information).
If the individual is not a Veteran or Eligible Person, select the “No” radio button.
Once the required fields have been answered accurately, select the “Next” button to continue.

Slide 35
Next, is the **Employment** tab. Answer the required fields in the **Employment Information** section. Some of the fields have auto-filled from registration; please check for accuracy.

If you select that the individual's **UC Eligibility Status** is "Claimant" or "Exhaustee," the system requires that you must complete the **Claimant was Referred By** and the **Claimant has been exempted from work search** fields. This set of questions is referring to the individual's unemployment insurance status and whether they received information that they are required to attend one of the Unemployment Insurance workshops.
In addition, the "i" icon is very helpful with answering questions in the Employment tab.

Slide 36
Continuing with the **Employment** tab, Employment Information section, although there is not a red asterisk next to the **Number of Weeks Unemployed** field, it must be completed with a value greater than "0" to move forward in the application.
The wage an Onet code information is optional. Finally, if the individual did not enter employment history during registration, it can optionally be entered here by selecting the Add Employment History link. Any employment history entered in the application will add to the individual's Background Wizard and system resumes.
If you choose to not enter employment history and all fields are complete, select the "Next" button to continue to the next tab.

Slide 37
If you selected the "Add Employment History" link (shown on the previous slide), please complete the required fields.
When typing into the **Employer Name** field, the system may populate a drop-down of potential employers. For example, if you begin typing "Target", a list of possible Target locations will populate as options. If you select the employer from the drop-down, much of the information in the subsequent fields will be filled with the appropriate information. If you begin to type in an employer and the system does not populate options in the drop-down, you can still enter the employer's information manually.
Next, type the **Job Title** in the box. Like with the Employer Name, when typing the system may populate a drop-down of potential Job Titles. If you select on the system's suggested Job Titles, the **Occupation Title** section will auto-fill with associated occupation titles. If no suggested occupation titles appear, use the Search for an occupation link.

Slide 38
Continuing with the **Position** section, enter all required fields.

Slide 39
Finally, enter the **Job Duties** in the text box.
Once complete, select the "Save" button.

Slide 40
Added Employment Information
Once the employment history information is entered, it will appear in the **Individual Employment History** table on the Employment tab of the application.

Slide 41
Next, is the **Education** tab. This screenshot is what staff will see if completing the application for the Adult program. If completing the application for a Youth, the screen

will look different. Refer to the Youth Application Differences slides towards the end of this slide deck for Youth screenshots.

In the **Education Information** section, the **Highest education level completed** will auto-fill based on individual registration. The other fields, **Highest school grade completed**, **High school diploma or equivalent received**, and **School Status** must be answered. These questions pertain to school status at program entry.

Slide 42

After completing the **Education Information** section, complete the required fields in the **Education Partner Services** section. These questions all default to “Did not self-identify”, so be sure to answer the questions appropriately.

Once all required fields on the Education tab are complete, select the “Next” button to move to the next tab.

Slide 43

On the **Public Assistance** tab, complete the **Public Assistance Information** questions. The questions in this category pertain to the individual *or* a family member of the individual who has received one of the public assistance services in the last 6 months.

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.

Slide 44

The final questions on the **Public Assistance** tab pertain to the individual *only* and default to “No”. Be sure to answer the questions appropriately.

When the Public Assistance tab is completed, select the “Next” button.

Slide 45

On the **Barriers** tab, complete the **Individual Barriers** questions. All questions in this section default to “No”, so be sure to answer the questions appropriately.

Slide 46

Continuing with the **Barriers** tab, complete the **Barriers To Employment** section. All questions in this section also default to “No”, so be sure to answer the questions appropriately.

When the Barriers tab is complete, select the “Next” button to continue to the next tab.

Slide 47

Next is the **Household and Income** tab. Please note the text in blue on the **Income Information** section.

In this instance, low income has already been established based on previous entries in the application (in our example, the 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.

Slide 48

In the case that low income has not been established, **Family Size** and **Annualized Family Income** are required entries. Enter the appropriate information and use the “i” icon if you need additional information.
Once the Household and Income tab is complete, select the “Next” button to continue.

<u>Slide 49</u>
The **Miscellaneous** tab contains a few additional **Barriers** questions. Answer the required questions, and select the “Next” button to continue.

<u>Slide 50</u>
After you complete the **Miscellaneous Barriers** section you will complete the section called **Miscellaneous Employment** with a question specifically for your P2E program: “Prison to Employment participant.” After selecting the “Yes” radio button you will see additional questions/fields populate. The options for some of these questions will change depending on how you answer preceding ones.
The first question asks, **If formerly incarcerated, in what type of facility was the sentence served?** The options are: Federal, State, County, and Not Applicable.

<u>Slide 51</u>
If you select any of the first three, you will see an additional field for the type of facility. If you select “Federal facility”, the options are:

- Penitentiary
- Tribal
- Military
- Immigration determination
- Home detention

<u>Slide 52</u>
If you select “State facility” the options are:

- State prison
- Male Community Reentry Program (MCRP)
- Custody to Community Transition Reentry Program (CCTRP)
- Alternative Custody Program (ACP)
- Community Prisoner Mother Program (CPMP)
- Division of Juvenile Justice (DJJ)

<u>Slide 53</u>
If you select “County facility” the options are:

- County jail
- Alternative Custody Program (ACP), includes home detention and work release
- Local prison (LP), or felony prison term served in counties under Penal Code 1170(h)(5)
- County Juvenile Halls or Other Local Juvenile Facilities (JH)

<u>Slide 54</u>
If you select “Not Applicable” to **If formerly incarcerated, in what type of facility was the sentence served?** then you will see an additional field: **Justice Involved/Active County Supervision** with the following options:

- State Parole
- County Informal Probation

- County Probation, not PRCS
- County Deferred Entry of Judgment
- County Mandatory Supervision
- County Other Diversion Program
- County Post Release Community Supervision (PRCS)
- Other

Slide 55

Next, in the **Post Release Classification** field you can select Federal Supervision, State Parole, or County Probation, include Post Release Community Supervision (PRCS).

Slide 56

Once again, you will see an additional field for the **Type of Supervision**, with different options for State, Federal, and County. The options are as follows:

- Federal Supervision: Federal Probation (FR) or Federal Supervised Release (FSR)
- State Parole: Residential Programs or Outpatient and Drop-In Programs
- County Probation: Post Release Community Supervision (PRCS) or Fully discharged, not under any post-release supervision

Slide 57

You will then complete the following fields:

- Year released from custody
- Total time incarcerated – Years (0-60) and Months (0-11)
- Total number of offenses

And select “Next.”

Slide 58

Finally, the last tab of the application is the **Eligibility Summary**.

In the **Applicant Eligibility** table, the green highlight(s) represent the Title I 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. For the P2E program, the individual does not need to have Title I program eligibility if you are *only* serving them with P2E. You will still be able to establish eligibility and attach the grant for P2E in the section below. However, if you are co-enrolling the individual, they will need to be eligible for that particular Title I program.

The “Priority” column provides the barriers/characteristics of the client that may be used to determine if they qualify for priority of service or used to identify target populations.

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.

Slide 59

Next, in the **WIOA Grant Eligibility** section keep the options as “Not Applicable” for those you are not serving with WIOA special grants (WAF, VEAP, DEA, etc.)

The **Non-WIOA Grant** section applies to those entities who receive Non-WIOA grant monies or Local Funded Grants. If you are going to be serving this individual with a

Non-WIOA Special Grant (i.e. P2E), be sure the radio button is selected as “Yes”. If you are *not* providing services to this individual using a Non-WIOA Special Grant or Local Funded Grant, leave the options as “Not Applicable”.
Once you select the “Yes” radio button for the *Non-WIOA Special Grants*, you will see a table populate in the **Grants** section of the page. When this table appears, select the <u>Add</u> link from the Action column for the grant you wish to associate this individual to receive services. In our example, grant code 2287 – P2E Direct Services. For P2E, if you are going to be enrolling and providing services using both grant codes (2286 and 2287), be sure to select the <u>Add</u> link for both grant codes in the table.

<u>Slide 60</u>
At the end of the **Eligibility Summary** tab, you can assign yourself as the individual’s case manager by selecting the <u>Assign Me</u> link. Some staff have privileges to assign other staff as the individual’s case manager as well.
In the **Individual Signature** section, if you select the Create PDF box, the system creates a PDF and saves a copy of the form to the user’s documents. If you select the Include Staff Signature, the system will insert the signature on file for you. Finally, you can use the Applicant Signature link if you have an electronic signature pad linked to CalJOBS.
Finally, select the “Finish” button to complete the Title I Application.

<u>Slide 61</u>
Once you select the “Finish” button on the Eligibility Summary tab , you will receive a Finish Application pop-up message. The message states that the application was successfully saves and asks you where you would like to navigate to next.
If you select **Return to Programs Tab**, you will be routed back to the Programs Tab.
If you select **WIOA # - Participation**, you be routed directly to create Participation. We will review Participation in the next section of the slide deck.
In our example, we are going to select the Return to Programs Tab.

<u>Slide 62</u>
Completed Title I Application
After selecting the **Return to Programs Tab** option, you can scroll down to the Title I Application section to see the completed Title I application. This means that all steps and required fields of the application have been answered. At this point, eligibility for your program has been established, *however*, this individual is **not** yet enrolled in your program.
If you see something other than “Complete” next to the WIOA #, the application is likely incomplete and needs to be completed before you can continue. Examples of statuses other than “Complete” include:
Incomplete = application is missing required data. Will stay this way until the application is completed. When staff go back in to edit the application, they should look for steps that are “grayed out” meaning they are incomplete. The step will turn green once completed.
Partial = incomplete application because application is missing required data. Staff selected a check box at the bottom of the first step of the application, which indicated that this is a partial application. This will allow navigation to any page to fill out any information that is available. Eligibility will not be fully determined nor will the application

be marked complete until the partial flag is removed and any missing information is provided.
Case Closed = Staff created a Closure for the client, but an Exit did not take place yet.
Case Exited = The application has exited and client has not received clock-restarting activity for over 90 days. No future services are planned, with the exception of self-service, information only activities, or follow-up services.
Closed, never enrolled = No activities are in the application, the application will not be in Performance. This is usually created when an app was created in error.

Slide 63
When the application is expanded, multiple sections, or ribbons, populate below. These ribbons are used to enter important participant data, like activity codes, credentials, follow-up information, etc.
Also on the Programs tab within your completed Title I application, you can expand the application to show multiple sections, or "ribbons" that are used to enter important participant data.
We will be navigating through most of these ribbons throughout our training.

Slide 64
Creating Participation

Slide 65
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.

Slide 66
Create Participation
This is what your Program Application 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 yellow) 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.

Slide 67
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.

<u>Slide 68</u>

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 a Non-WIOA Special Grant, 97 – Non-WIOA Special Grant 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 LWDB Region and the Office location if it is not auto-filled.

<u>Slide 69</u>

Still within the **General Information** tab, we are now under **Enrollment Information.** If you are serving your individual with a special grant, select the grant from the **Grant** dropdown. In our example, our individual is receiving services Local Funded Grant, therefore we selected the 2287 – P2E Direct Services grant code. You MUST ensure the correct Grant is selected to properly enroll your participants into your program.

To select an Activity Code, use the link titled “<u>Select Activity Code</u>.” 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.

<u>Slide 70</u>

Still within the **General Information** tab, we are now under **Staff Information.** If you aren’t already, you can assign yourself as the individual’s case manager in the Current Case Manager field. The last field of the section allows you to add a case note if desired. We will not add a case note at this time, but will review the process in another slide deck.

Finally, select the “Next” button at the end of the General Information page.

<u>Slide 71</u>

We will not review any of the other tabs in the enrollment screen, but rather skip over to the **Closure Information** tab. To do this, click on the Closure Information tab at the top of the screen. We will review the other tabs in the enrollment screen when we review subsequent activities.

On the **Closure Information** tab, select the “Finish” button if you would like to leave this activity code *open* to close at a later date.

If you would like to *close* the activity code because it was a one-day, one-time service, you can enter the **Last Activity Date** and select a **Completion Code** from the drop-down. Once you enter the date and completion code, select the “Finish” button.

This will complete the activity enrollment and create Participation for the individual.

Slide 72
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.

Slide 73
Part 2A Summary

- Discussed the WIOA Title I Application
- Demonstrated how to complete the Title I Application for P2E
- Discussed Participation/Enrollment
- Demonstrated how to create Participation

Slide 74
Questions
For any questions concerning this module, please contact the Statewide Training Unit at CBUTraining@edd.ca.gov