Title Slide
P2E CalJOBS℠ Participant Training Webinar Series
Part 2B: IEP, Activities and Case Notes, Alerts and Case Management

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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.
- Also in the resources pod you will find the PDF slide deck for today's training session. We will also post this and the rest of the slide decks on CalJOBS.

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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

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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

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- Part 2B Objectives
- Complete the Individual Employment Plan (IEP)
- Add Activity Codes and Case Notes
- Review Case Assignment and System Alerts
- Demonstrate how to configure and run Participant Reports

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Completing an Individual Employment Plan (IEP)

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The Individual Employment Plan (IEP) is a function within CalJOBS which enables staff to record participants' goals, objectives, and services concerning their employment program(s).
The IEP is located on the Plan link under Staff Profiles >Case Management Profile.

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Why use the IEP
Using the IEP, staff will be able to:

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

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

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IEP Process Flow
When creating an IEP, start by providing plan information, then add goals to the plan, then objectives to the goal.
When closing an IEP, start from right to left by closing the objectives, then the goals, and then the plan.

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Demo Time!

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

Next, locate the **Plan** tab at the mid-point of the page and select the "Create Individual Employment Plan / Service Strategy" button.
Note: An individual can only have one IEP open at a time. However, the IEP can be used by both Title I and Title III staff to case manage an individual.

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Plan
Complete Plan Information
(except Plan closed on date)
The first tab to appear will be the **Plan** tab. Complete the required **Plan Information** fields.
Enter the **Plan Start Date, LWDB/Region,** and the **Plan started in office location**. This identifies which office the plan originated. You will not need to complete the **Plan closed on** date at this time. Once closed, this action cannot be undone.
Staff have the option to display services completed when printing the IEP by checking the designated box.
When finished with this page, select the "Next" button.

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Goals
Next, the **Goals** tab will appear. Beneath the IEP/ISS Goals table, click Add new Goal. When selected a new form will populate to enter goal information.

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Goals
Complete the required fields under the **Goal Information** section. Select the **LWDB/Region** and **Office** that is associated with this goal. Select the associated program for the **Program Affiliation** field. Title I staff will select WIOA Program. Title III staff will select WP Program.
Select the **Type of Goal** and **Term of Goal** (duration) from the dropdown lists.
Next, enter a short **Description of Goal** in the text box provided. This will be the title of the goal, so you can use the details box below to enter more detailed information.
Enter the **Date Established** (when the goal is initiated) and **Estimated Completion Date.**
The **Actual Completion Date** will be added later when closing the goal. The **Completion Status** defaults to "Open".

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Goals
Next, the **Actual Completion Date** and **Reason Closed** will be added later when closing the goal. The **Completion Status** defaults to "Open".
Finally, use the **Goal Details(Comments)** box to enter any information about the goal. Staff should be as descriptive as possible regarding the goal the individual is trying to obtain. For example: Mark is looking to start work in an office environment. He will need typing and training/experience using word processing and spreadsheet software.
When finished with all entries, select the "Save**"** button.

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

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

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Objectives

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

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If choosing the Select pre-defined objectives link, complete the required fields.

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

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

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

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

Enter the **Date Established** and the **Review Date** will auto-fill to 45 past the Date Established. Then click the "Save" button.

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Objectives

The pre-defined objective now appears in the **Objective Information** table. To edit the Objective, select the Edit link in the Action column.

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

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Objective Information

- Attach the objective to the appropriate goal from the drop-down (date will auto-fill)
- LWDB, Office will auto-fill; choose Title I Program
- Enter short objective description

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

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- Enter Date Established; Review Date will auto-fill
- Leave Actual Completion Date blank and Reason Closed "None Selected"; Completion Status "Open"
- Enter objective description in text box

Scrolling down, enter the **Date Established** and the **Review Date** will auto-fill to 45 days past the Date Established. Leave the **Actual Completion Date** blank, **Reason Closed** as "None Selected", and the **Completion Status** as "Open". Type any details or comments in the **Objective Details** text box.

Click “Save” to complete this objective.

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Objective Information

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

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

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Services

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

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

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

Select the “Finish” button to complete the IEP.

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Completed IEP

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

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

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

Click the Display/Print link to view the IEP.

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

Scroll down to the bottom of the page and click the “Print” button. This document will appear in a new window for you to open or save.

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IEP Process Flow

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

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

Let’s take a look at closing an IEP.

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Closing an IEP- Objectives

First, click the Edit link within the IEP.

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

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Under the **Objective Information** section, most required fields auto-fill. Be sure to enter the **Actual Completion Date**, **Completion Status** from the dropdown menu, and **Reason Closed** from the dropdown menu. You can also enter any additional information in the text box.

Once all fields are complete, click "Save."

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Closing an IEP- Goals

Next, go to the **Goals** tab and click the Edit link for the goal you wish to close. Note that you can only close a Goal once all associated Objectives are closed.

Under the **Goal Information** section, most required fields auto-fill. Be sure to enter the **Actual Completion Date**, **Completion Status** from the dropdown menu, and **Reason Closed** from the dropdown menu. You can also enter any additional information in the text box.

Once all fields are complete, click "Save."

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Closing an IEP- Plan

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

Close the IEP by entering the **Plan closed on** date. Note the text in the blue box.

Click the "Next" button. This will finish closing the IEP. You do not need to navigate all the way to the Services tab to close the Plan. Once the "Next" button is selected, the Plan is saved and closed. Select the Exit Wizard link to exit the IEP.

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Closed IEP

The IEP will now have a status of "Closed".

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

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

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Adding Activities and Case Notes

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CalJOBS Activity Codes

What are activity Codes?

"If it's not in CalJOBS, it didn't happen."

Activity codes are they three digit codes associated to each the dozens of specified services provided by our WIOA programs.

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Where to Find CalJOBS Activity Codes

Let’s begin by reviewing some information on CalJOBS activity codes, including where to find information and guidance on each code. To access the current Information Notice on CalJOBS activity codes, go to www.edd.ca.gov and type in WSIN17-09 in the top search bar.

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Where to Find CalJOBS Activity Codes

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

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CalJOBS Activity Codes Dictionary

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

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CalJOBS Activity Codes Detailed Listing – Individual

The Activity Codes Detailed Listing- Individual provides information about the activity code, including the program affiliation and reporting category, whether the activity restarts the exit clock, associated PIRL elements, and duration.

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Activity Code Best Practices

Enter activity codes in real time; If you use Projected Begin Dates (PBD), remember to go back and add Actual Begin Dates

The activity code will “System Close” 30 days after the PBD

If the activity code closes and that is the last activity code on the application, the Exit Clock would start on the application and will cause the application to soft-exit in 90 days (this is assuming the code in question is NOT a self-service, info-only or follow-up type of activity).

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Activity Code Best Practices

Close your activity codes within 30 calendar days after the Projected End Date (PED), otherwise “System Closed” will occur

Once an activity becomes System Closed, the data cannot be changed or updated.

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Activity Code Best Practices

- Be sure to choose the correct Customer Program Group if the individual is eligible for multiple programs
- Enter Service Provider Information for training activity codes

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Adding Activity Codes

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

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

Be sure to choose the correct **Customer Program Group**, based on your grant/funding stream. Keep in mind that your selection in this field determines available options for activity codes and fund streams.

The **LWIA Region** will be your LWIA Region. **Office Location** will be your office/agency name.

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

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After completing the required fields in the **General Information** section, scroll down to **Enrollment Information.**

Select a **Grant** for this activity, if applicable. If you aren't serving this individual with a WIOA or Non-WIOA Special Grant, leave Grant as None Selected.

Next, to select an **Activity Code**, use the link titled "Select Activity Code." This will generate a popup box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the Activity Code box. For our training purposes today, we chose "300 Occupational Skills Training – Approved Providers List (ITA)," but you will enter whichever activity code is appropriate for the services you provide.

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

Note: If you choose to use a **Projected Begin Date**, you must remember to go back into the system and add an **Actual Begin Date** when the activity begins. It is always preferred to use Actual Begin Dates. Then enter the **Projected End Date**. Note that the Projected End Date can be changed or pushed out if necessary.

Finally, if the activity is paid through their **Individualized Training Account (ITA)**, then select **Yes** from the drop down menu, otherwise select **No**.

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

Note: Once you select the "Next" button, the activity code is created and added to the individual's activity table. In addition, once "Next" is selected, the Customer Program Group and Activity Code are locked down.

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

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

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

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

Once all fields are complete, select **Next**.

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After you enter **Service Provider** information you will be directed to the **Enrollment Cost** tab. If you do not want to enter enrollment costs, you may skip this tab by clicking directly on the Closure Information tab.

If you'd like to enter enrollment costs for any fundable activity, such as a 300 – Occupational Skills Training or 181 – Supportive Service: Transportation, you can enter the information on this screen.

In our example we have selected a 300 – Occupational Skills Training activity code, so our cost information includes the following line items: **Tuition/Fee**, **Books**, **Tools**, and **Other Costs**. You will enter the dollar amount in the appropriate line item. As you do so, you will see that the **Total Training Costs** field will calculate the total amount of the cost. As a reminder, you must enter the cost amounts in the line item fields, not in the Total Training Costs field.

Just below the **Other Costs** line item/field, you will see a drop-down menu where you can add additional line items to your **Enrollment Costs**. If you would like to add a line item, select the appropriate category and select the **Add** button. Then you will be able to add the dollar amount in the cost field for that **Additional Costs** line item.

Once complete, select the "Next" button to continue.

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For training purposes, we will skip the **Financial Aid**, **Enrollment Budget**, and **Budget Planning** tabs. To finish adding the activity, click on the **Closure Information** tab.

On the **Closure Information** tab, if you would like to close the activity, you can do so by entering a **Last Activity Date** and **Completion Code**. If you would like to leave the activity open, then leave the date empty and completion code at "None Selected."

To create a case note, select the Add a new Case Note link. You will learn how to add a case note in a subsequent section of this training module.

Finally, select the **Finish** button.

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Case Notes Best Practices

- Go paperless! Enter case notes in CalJOBS to document additional information on services and interactions with individuals
- Create Case Note Templates to save time
- Use Case Note Subject naming conventions
- Attach any supporting documents in the Case Note Attachment section

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Creating a Case Note

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

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

The **Case Note Details** section must be completed. Enter the **Contact Date** and whether or not you want to suppress the Case Note. A suppressed Case Note means that the note will not be visible to others outside of your Region. We do not recommend that you suppress your case notes, unless you are inputting sensitive information.

Choose the **LWDB/Region**, **Office Location**, and **Program** (Title I) from the dropdown menu, if not already displayed.
The **App ID** should be auto-filled. If the individual has multiple active applications listed in the drop-down, select the Application ID you would like to associate this case note.

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Creating a Case Note
Type in the **Subject** of this Case Note, and type a brief note in the **Case Note Description**. The **Partner Program** and **Contact Type** are optional.
Note: It may be very beneficial for you to use a consistent naming convention for the subject of your case notes. For example, writing the number of the activity code the case note corresponds to (in our example, 300).This will be very helpful when running a case note report.

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Creating a Case Note
Scrolling down to the bottom of the case note form, you may choose to create a message from this case note by marking the **Create Message from Case Note on Save** checkbox. If you check this box, the individual for who you are creating a case note will receive a message with the contents of the case note. If you do not wish to create a message from this Case Note, do not check the box.
The system will allow you to scan or upload a document to be associated with this note if you need to do so. This may be done by selecting either the Add a Document or Scan a Document link.
When the Case Note is complete, select the “Save” button.

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

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You will find the added activity on the activity table in your **Activities/Enrollments/Services** ribbon.
The Activity Status in the Status column will reflect whether the activity is open or closed. There is a legend at the bottom of the screen that explains the different status icons.

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System Alerts

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Alerts
Alerts are a helpful feature for case managers.
From the **Communications** left navigation menu, hover over **Alerts**.
Select **My Alerts** from the fly-out menu.

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My Alerts
Click **Modify My Alert Subscriptions** and select which **alerts** from the list you would like to set.

Alerts are listed by category: Individual Registrant, Job Order Alerts, Eligible Training Provider, Wagner-Peyser, WIOA (Title I), Trade Adjustment Assistance, Generic Program, Miscellaneous, IEP, and Employer Profile alerts. Shown here is the **Job Orders about to Expire** alert.

Select the timing for when the alert should run by making a selection from the drop-down list in the **Days** column. The options in this list vary depending on the type of alert subscription being run.

Then, make a selection in the **Notify** column to choose how frequently the system will alert you for a subscription, if applicable. The system can alert you *On the day only* that an alert would be valid (i.e. on the exact day job order's expiration). The system can also notify you on that day and *Everyday after* that the alert is still valid and the issue is outstanding.

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Helpful Alerts

- WIOA Activity Projected Start Date
- IEP Goals Alert
- WIOA Soft Exit
- WIOA Follow-up Alert

These alerts may be helpful, but you will want to review the entire list to choose which alerts you want to run.

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Alert Descriptions and days to send notifications to you.

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Participant Reports

- Enrolled Individuals
- Services Provided Individuals
- Individual Case Notes
- Saving to My Reports

We will review the following participant reports, including where to find them and some suggested filter options.

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Enrolled Individual Report

The **Enrolled Individuals** report will provide a summary and/or list of individuals enrolled in a program.

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Individual Reports > Enrolled Individuals

By Region/LWIA

The **Enrolled Individuals** report will provide a summary and/or list of individuals enrolled in a program.

This report it one of the primary reports that staff members can run when documenting case management program information on a group of individuals. Examples of typical reports staff may generate might include a breakdown by zip code for all individuals enrolled in WIOA who have a disability status, or a breakdown by education level for all individuals enrolled in Wagner-Peyser who have been veterans for over 180 days.

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Report Fillers

1. In the **Program** area, select “Title I- Workforce Development (WIOA)” in the **Program** field. Next, select the applicable customer group in the **Customer Group** field, as this report will not produce a column to differentiate the results.
2. In the **Location** area, go to the **Region/LWIA** and **Office Location** fields and make appropriate selections. If you are running this report for a Non-Local Area, be sure the Region/LWIA is WIOA Statewide Grant Contractor.
3. Next in the **WIA-Specific** area, select “Local Funded Grant” from the **Grant Type** drop down, and select the appropriate P2E grant code in the **Available Grants** section.
4. Finally in the **Date** area, select the appropriate **Date Filter** option. Each option will likely produce different results. Then, select your appropriate dates in the **Date Range** field.

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Results

Here is your list of individuals enrolled in your program.

Note: If you do not see as many participants as you may have thought were enrolled, there is a good chance that some of your individuals are NOT enrolled, meaning Participation might not have been created.

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Services Provided Report

Next we will review the **Services Provided Individuals Report** which shows information about specific services provided to individuals by staff members.

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Services Reports > Services Provided Individuals

By Services

Next we will review the **Services Provided Individuals Report** which shows information about specific services provided to individuals by staff members. You can run this report “by Region/LWIA”, depending on what you are looking for.

The reports can be sorted by various criteria, such as age, county, staff member assigned, and filtered by parameters such as program, registration date range, or last one-stop access date. **Note**: These reports require Staff to select a program type and cannot be run to search for services provided in WIOA and Wagner-Peyser simultaneously.

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Report Fillers

1. In the **Program** area, select “Title I- Workforce Development (WIOA)” in the **Program Type** field. You can leave the **Customer Group** field as “None Selected”.
2. In the **Location** area, go to **Region/LWIA** and **One Stop Location** and make appropriate selections. If you are running this report for a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
3. If you would like to run a report on any particular service(s), you can filter the report by activity by selecting one or more **Activity/Service Code** from the

Activity filter. If you would like to see all services, leave this section as "None Selected".
4. Next in the **WIA-Specific** area, select your grant in the **Available Grants** field. To find your grant faster, you can use the **Grant Type** filter to narrow the results. For P2E use NonWIOA Special Grant.
5. Finally in the **Date** area, select "Actual Begin Date" in the **Filter Date By** field. Then, select your appropriate dates in the **Set Date Range** field. Select "Run Report".

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Services Provided Individuals - Results
Here is your list of services provided to those enrolled in this program.

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Individual Case Notes Report
These reports retrieve case notes that have been entered by staff in an individual's profile.
Documentation – These reports include case notes and document management reports. For example the Case Notes group provides staff the ability to retrieve an actual case note in the system, or several case notes that share a common phrase or word for a specific user type (Employer, Individuals, or Provider). The Report Type field and Case Note Subject field work in conjunction with one another to locate and show entire case notes.

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Case Management Reports > Documentation
Individual Case Notes
The **Individual Case Notes** report will retrieve case notes created for individual participants. Staff can search for specific case notes in a variety of ways, including a keyword search that locates case notes based on a word or phrase in the subject field or the narrative field.

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Report Fillers
1. In the **Report Type** area, select "Includes" from the **Report Type** drop-down.
2. In the **Case Notes** area, type in what word or number you want find that is included in the subject name of the case notes in the **Case Note Subject** field. If you are not looking for a certain case note subject, leave the box blank.
3. In the **Program** area, select "WIOA Program".
4. In the **Location** area, go to **Region/LWIA** and **Office Location**, and make appropriate selections. If you are running the report for a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
5. Finally in the **Date** area, select the appropriate date range in the **Date Range** field.

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Results

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Save to My Reports

If you would like to save a report and its filters to **My Reports**:

1. Choose the "Save to My Reports" link at the bottom of each report *before* you select the "Run Report" button.
2. You may receive a pop-up blocker message. Allow the pop-up, and then name your report in the description area; select "Save."
3. Your report with the same filters will appear in **My Reports.**
4. You can easily run the report by selecting "Update Filters" in the Action column when you are in your **My Reports**.

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Part 2B Summary

In this module, we:

- Completed an Individual Employment Plan (IEP).
- Added subsequent activities and case notes – We will learn how to add activities to track services provided to the individual and attach a case note to both an activity and the Title I application.
- Reviewed Case Assignment and System Alerts – How to set up case management groups so that staff can assign themselves as case managers, and Alerts that will help staff keep track of their participants
- Demonstrated how to run Participant Reports – These reports relate to enrolled individuals, services provided, case notes, etc.

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Questions?