P2E CalJOBS℠ Participant Training Webinar Series

Part 2B: IEP, Activities and Case Notes, Alerts and Case Management

Employment Development Department
State of California

Housekeeping

Sign In – Name and Organization

Adobe Connect ‘Questions’ Pod

Adobe Connect ‘Resources’ Pod

PDF Slide Decks

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

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

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

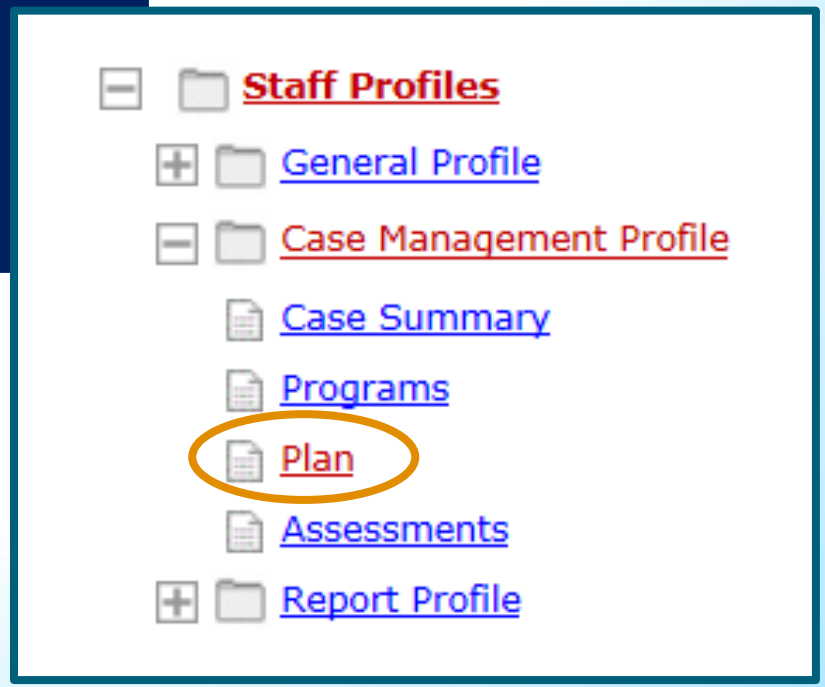
Part 2B Objectives

- 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

Completing an Individual Employment Plan (IEP)

Staff Profiles > Plan

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



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

IEP Process Flow

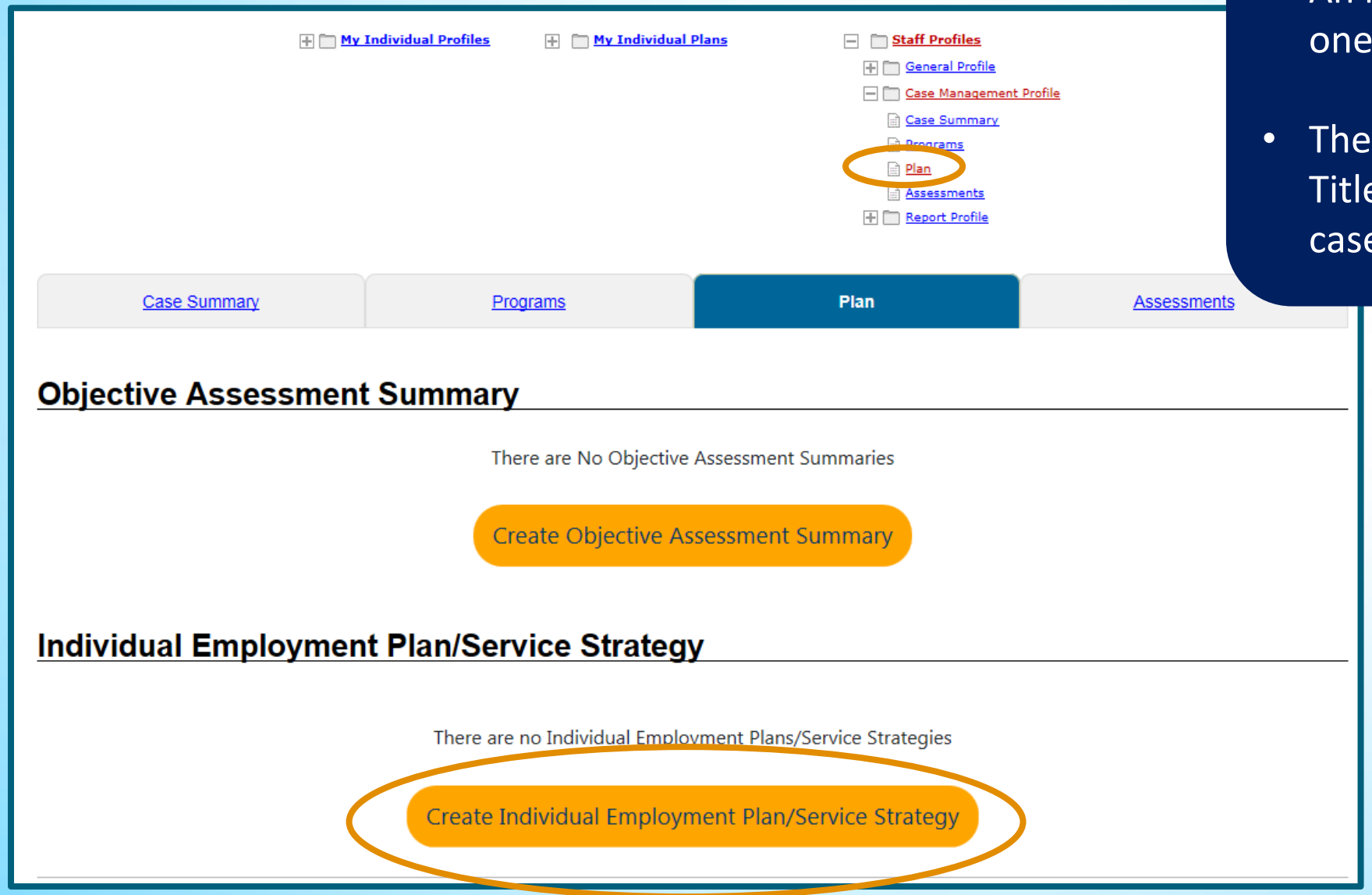
When creating an IEP…

Plan **Goals** **Objectives**

When closing an IEP…

Demo time!

Creating an IEP



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

Plan

Complete Plan Information (except Plan closed on date)

Plan Information

* Plan Start Date (mm/dd/yyyy) Today

* LWDB/Region Golden Sierra Job Training Agen

* Plan started in office location None Selected

Plan closed on (mm/dd/yyyy) Today

When printing plan do you want to print services?

Next >>

Exit Wizard

Goals

Plan | Goals | Objectives | Services

For help click the information icon.

General Information

User Name	OLIVIAPOPPY
User ID	36943
Name	Poppy, Olivia

IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Program	Staff	Status	Action
No History Records							

Add New Goal

Goals

Goal Information

* LWDB/Region	Golden Sierra Job Training Agen
* Office	16028 El Dorado County
* Program Affiliation	☑ Title I - Workforce Development (WIOA)
* Type of Goal	None Selected — Employment, Training, Schooling
* Term of Goal	None Selected — Short Term, Long Term, Intermediate Term
* Description of Goal	Obtain job as welder.
* Date Established	08/20/2019 (mm/dd/yyyy) Today
* Estimated Completion Date	01/20/2020 (mm/dd/yyyy) Today

Goals

Fill any comments in the Goal Details box

IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Program	Staff	Status	Action
4556	Employment - Obtain job as welder.	08/20/2019	01/20/2020	WIOA	Bridges, Lyndsey	Open	Edit Delete

Add New Goal

Exit Wizard

<< Back Next >>

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

Objectives

Plan | Goals | Objectives | Services

For help click the information icon.

General Information

User Name	OLIVIAPOPPY
User ID	36943
Name	Poppy, Olivia

Staff may either click Add new objective or Select pre-defined objectives

Objective Information

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

Add new objective

Select pre-defined objectives

Objective Information

* **Goal**	Obtain job as welder.
* **LWDB/Region**	Golden Sierra Job Training Agen
* **Office Location**	16028 El Dorado County
* **Program Affiliation**	Title I - Workforce Development (WIOA)

If selecting pre-defined objectives, complete the required fields

	Pre-defined Objectives	Date Established	Review Date
☐	Resume Writing	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today
☐	Counseling	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today
☐	Mentoring	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today
☐	Skill Assessment	(mm/dd/yyyy) Today	(mm/dd/yyyy) Today

Created By 31890

Save Cancel

Objectives

Add a new or unique objective

Objective Information

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status	action
Obtain job as welder.	Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open	Edit Delete

Add new objective

Select pre-defined objectives

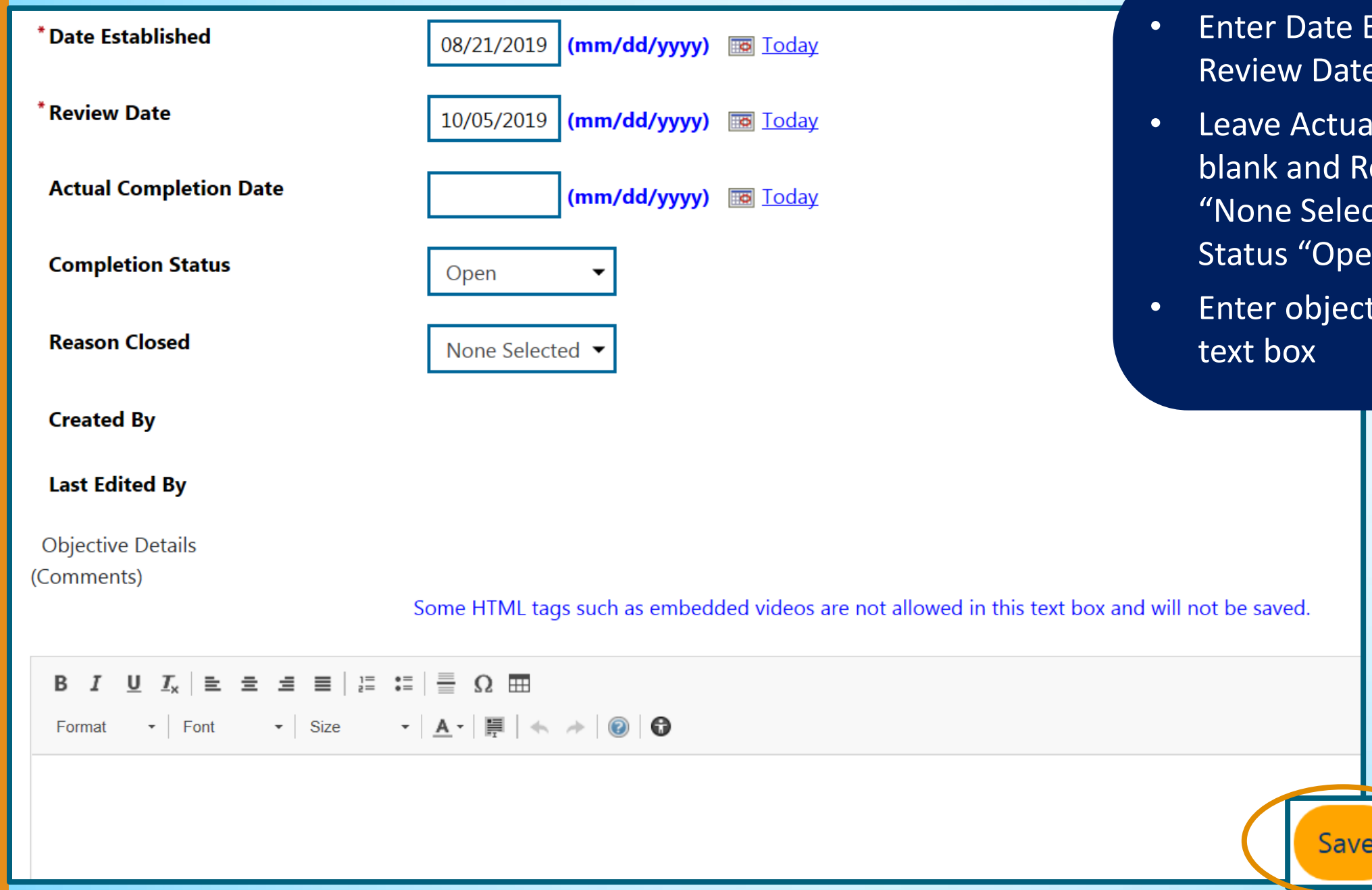
Exit Wizard

<< Back Next >>

Objective Information

* Goal	Obtain job as welder.
Goal Date Established	8/20/2019
* LWDB/Region	Golden Sierra Job Training Agen
* Office Location	16028 El Dorado County
* Program Affiliation	Title I - Workforce Development (WIOA)
* Objective	Enroll in welding program

- 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



- 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

Objective Information

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status	action
Obtain job as welder.	Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open	Edit Delete
Obtain job as welder.	Enroll in welding program	08/21/2019	10/05/2019	WIOA	Bridges, Lyndsey	Open	Edit Delete

Add new objective

Select pre-defined objectives

Exit Wizard

<< Back

Next >>

Services

Plan | Goals | Objectives | Services

General Information

User Name	OLIVIAPOPPY
User ID	36943
Name	Poppy, Olivia

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.

IEP/ISS Services

App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
2243488 - WIOA	101 - Orientation	A - 08/20/2019	A - 08/20/2019		31890
2243488 - WIOA	205 - Development of IEP/ISS/EDP	A - 08/20/2019	A - 08/20/2019	Employment Service	31890

Exit Wizard

<< Back | Finish | Delete

Completed IEP

Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
4271	Golden Sierra Job Training Agency	16028 El Dorado County	OPEN	1	Bridges, Lyndsey	08/20/2019	Edit Delete Display/Print

- 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

Return

Print

General Information:

Plan ID:	4271
User ID:	36943
Name:	Poppy,Olivia
Plan was started on:	08/20/2019
Plan was started in office location:	16028 El Dorado County
Plan closed on:	

Goals and Objectives Established:

Goal # /Goal ID	Program Affiliation (s)	Type of Goal	Term of Goal	Date Established	Estimated Date of Completion	Actual Completion Date	Status
1/4556	WIOA	Employment	Intermediate Term	08/20/2019	01/20/2020		Open
Goal Description: Obtain job as welder.							
Comments: Olivia Poppy would like to gain employment as a welder. She has completed a couple welding classes at the local community college, but she did not finish the program.							

Objectives to Goal #1

Objective	Date Established	Review Date	Program	Staff	Status
Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open
Comments:					
Enroll in welding program	08/21/2019	10/05/2019	WIOA	Bridges, Lyndsey	Open
Comments: Enrolling in a welding credential program at local community college.					

Signatures

Applicant Signature Date

Parent/Guardian Signature Date

Staff Signature Date

IEP Process Flow

When creating an IEP…

Plan **Goals** **Objectives**

When closing an IEP…

Closing an IEP- Objectives

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
4271	Golden Sierra Job Training Agency	16028 El Dorado County	OPEN	1	Bridges, Lyndsey	08/20/2019	Edit Delete Display/Print

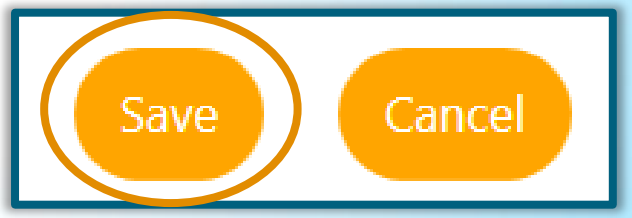
Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status	action
Obtain job as welder.	Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open	Edit Delete
Obtain job as welder.	Enroll in welding program	08/21/2019	10/05/2019	WIOA	Bridges, Lyndsey	Open	Edit Delete

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

* Goal	Obtain job as welder.
Goal Date Established	8/20/2019
* LWDB/Region	Golden Sierra Job Training Agen
* Office Location	16028 El Dorado County
* Program Affiliation	Title I - Workforce Development (WIOA)
* Objective	Enroll in welding program
* Date Established	08/21/2019 (mm/dd/yyyy) Today
* Review Date	10/05/2019 (mm/dd/yyyy) Today
Actual Completion Date	08/21/2019 (mm/dd/yyyy) Today
Completion Status	Closed
Reason Closed	Successful

Complete the Objective Information

- Actual Completion Date
- Completion Status
- Reason Closed



Closing an IEP- Goals

IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Program	Staff	Status	Action
4556	Employment - Obtain job as welder.	08/20/2019	01/20/2020	WIOA	Bridges, Lyndsey	Open	Edit Delete

- Can only close Goals once all associated Objectives are closed
- Select the Goal's Edit link
- Complete the Goal Information

Save Cancel

* LWDB/Region	Golden Sierra Job Training Agen
* Office	16028 El Dorado County
* Program Affiliation	Title I - Workforce Development (WIOA)
* Type of Goal	Employment
* Term of Goal	Intermediate Term
* Description of Goal	Obtain job as welder.
* Date Established	08/20/2019 (mm/dd/yyyy) Today
* Estimated Completion Date	01/20/2020 (mm/dd/yyyy) Today
Actual Completion Date	08/21/2019 (mm/dd/yyyy) Today
* Completion Status	Closed
Reason Closed	Successful

Closing an IEP- Plan

- Close all Objectives and Goals prior to closing the Plan
- Enter **Plan closed on** date and click “Next” to finish

Plan Information

* **Plan Start Date**	08/20/2019 **(mm/dd/yyyy)** Today
* **LWDB/Region**	Golden Sierra Job Training Agen
* **Plan started in office location**	16028 El Dorado County
Plan closed on	08/21/2019 **(mm/dd/yyyy)** Today

Recording the IEP Plan Closure Date will lock-down the form and prevent any additional modifications.

Next >> Delete Print

Closed IEP

Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
4271	Golden Sierra Job Training Agency	16028 El Dorado County	CLOSED	1	Bridges, Lyndsey	08/20/2019	Edit Delete Display/Print

Create Individual Employment Plan/Service Strategy

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

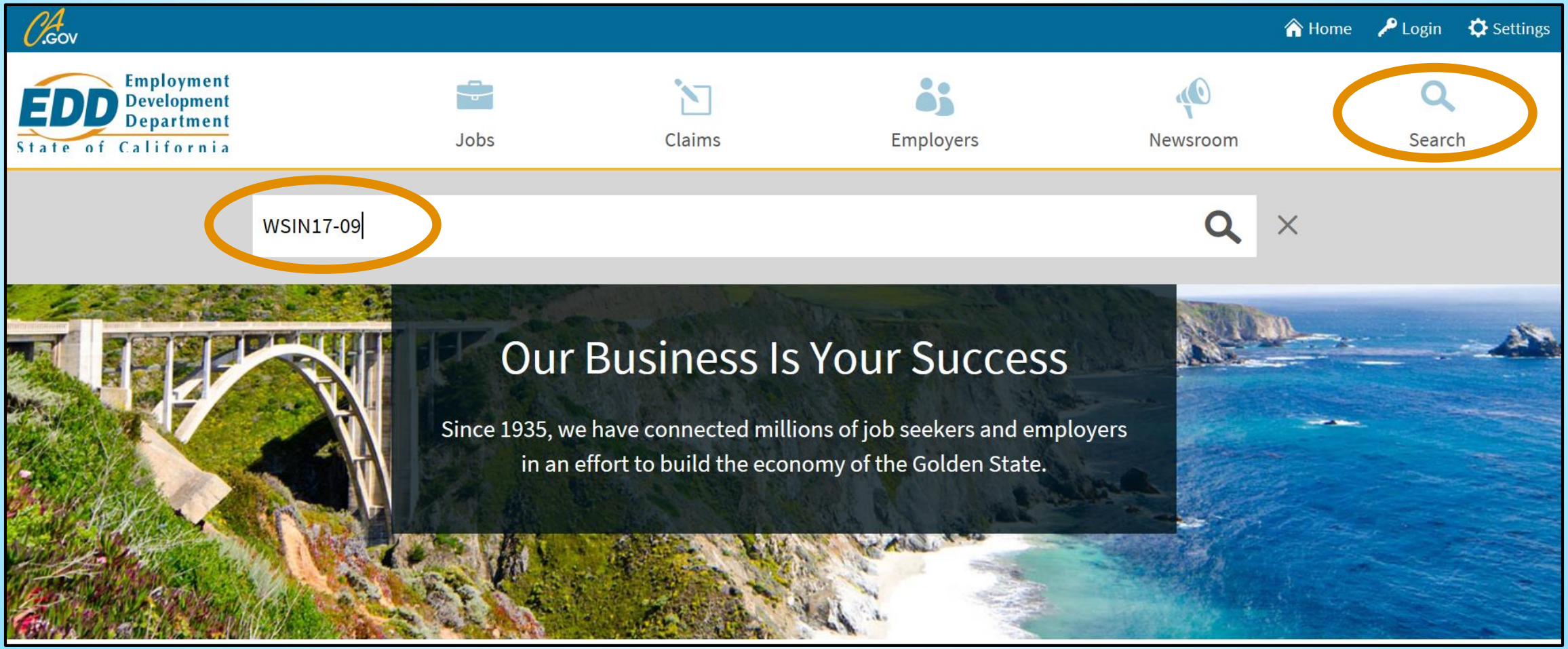
Adding Activities and Case Notes

CalJOBS Activity Codes

What are activity codes?

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

Where to Find CalJOBS Activity Codes



Where to Find CalJOBS Activity Codes

EDD Employment Development Department
State of California

INFORMATION NOTICE

Date: September 29, 2017 **Number:** WSIN17-09

Expiration Date: 10/29/2019

performance reporting guidance that created a need for a revised list of activity codes. The use of activity codes has a direct relationship to performance measures and should be evaluated closely. Staff should familiarize themselves with the following attachments to ensure accurate use of CalJOBS activity codes.

Attachments are available on the internet:

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

CalJOBS Activity Codes Dictionary

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

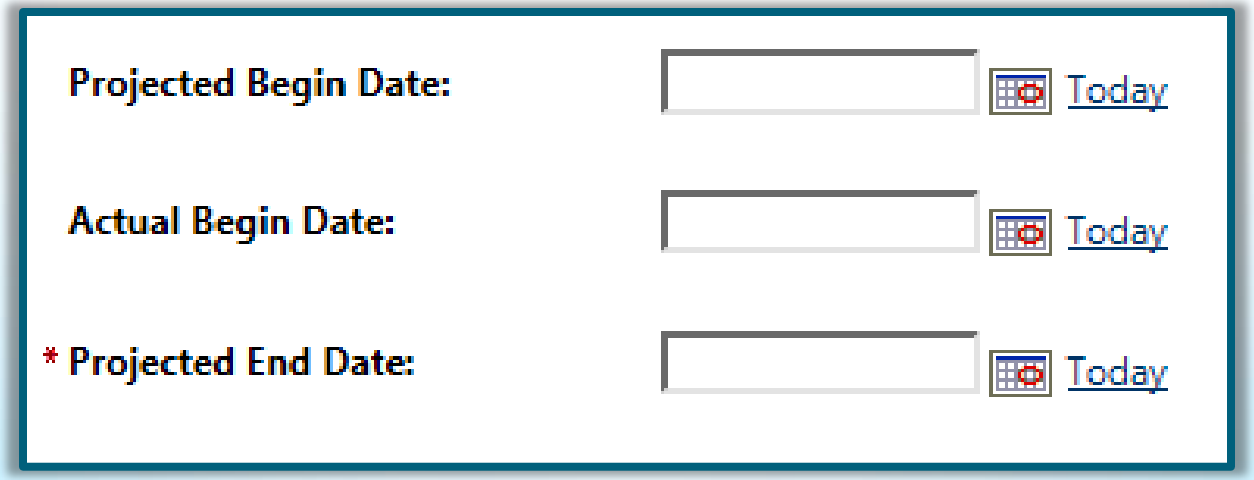
CalJOBS Activity Codes Detailed Listing—Individual

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

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

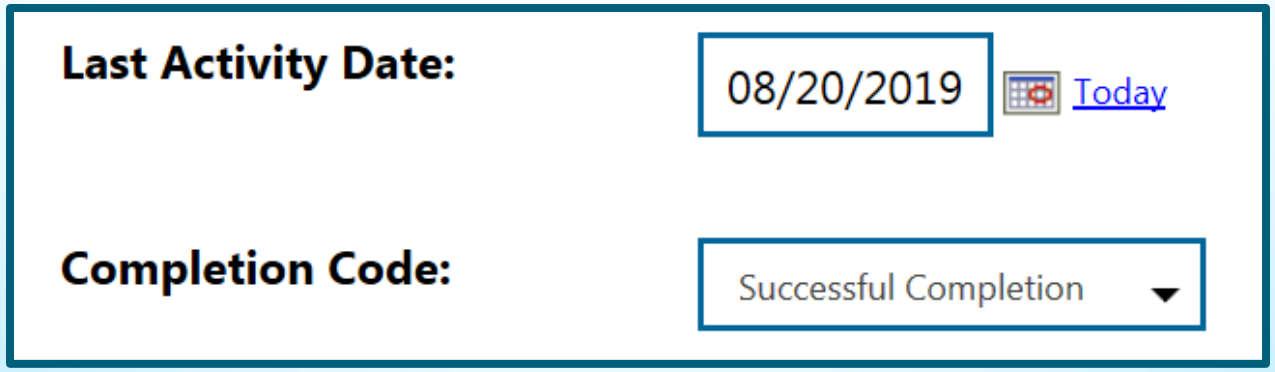
- The activity code will “System Close” 30 days after the PBD



Activity Code Best Practices

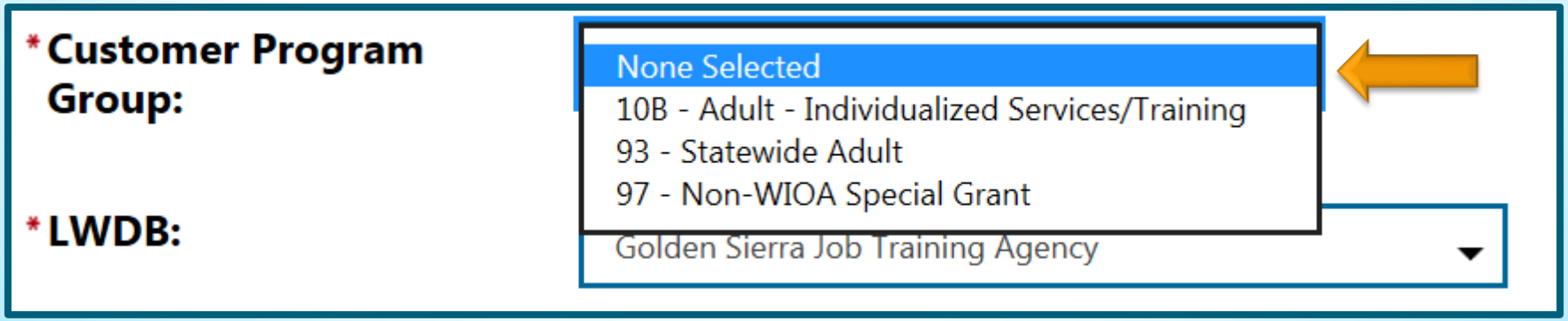
Close your activity codes within 30 calendar days after the Projected End Date (PED), otherwise “System Closed” will occur

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



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



Adding Activity Codes

Activities / Enrollments / Services 1

Create Activity / Enrollment / Service

Search:

Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	102 - Initial Assessment No Provider Information	W	Non-WIOA Special Grant 2287 - P2E Direct Services	N/A	06/20/2019	06/20/2019	Close

General Information | Service Provider | Enrollment Cost | Financial Aid | Enrollment Budget | Budget Planning | Closure Information

General Information

Participant User Name: LUKECAGE

Participant State ID: 31650

Last Name, First Name MI: Cage, Luke

Social Security Number: 9999

Address: 3030 7th Ave
Sacramento, CA 95817

Application Summary: **Program:**Title I - Workforce Development (WIOA)
Application Date:6/14/2018
Earliest Eligibility Date:06/14/2018

Participation Date: 06/26/2018

*** Customer Program Group:** 97 - Non-WIOA Special Grant

*** LWDB:** Fresno Area Workforce Investment Corporation

*** Office Location:** None Selected

Agency Code Search: Click Here

General Information | Service Provider | Enrollment Cost | Financial Aid | Enrollment Budget | Budget Planning | Closure Information

Enrollment Information

Grant: 2287 - P2E Direct Services

WIOA or Non-WIOA Partner Program: ☐ **Yes**, service is a WIOA or Non-WIOA Partner Program.

*** Activity Code:** 300 | Occupational Skills Training - Approved Provider List (ITA

[Select Activity Code]

Projected Begin Date: Today

Actual Begin Date: 06/26/2018 Today

*** Projected End Date:** 06/30/2019 Today

Any classes attended through Distance Learning: ○ Yes ◉ No

Participant has been issued an ITA and the ITA will pay for this service: Yes

General Information | Service Provider | Enrollment Cost | Financial Aid | Enrollment Budget | Budget Planning | Closure Information

Staff Information

Staff ID: 33633

*** Position:** Staff

Current Case Manager: Case currently Not Assigned to a Case Manager

Assign Case Manager

Assign Me

Remove Case Manager Assignment

Previous Case Manager:

Comments:

Case Notes:

[Add a new Case Note Show Filter Criteria]

ID	Create Date	Subject	Action
No data found.			

Next >>

General Information | **Service Provider** | Enrollment Cost | Financial Aid | Enrollment Budget | Budget Planning | Closure Information

Enrollment Service Provider Information

Enrollment Summary:

Enrollment ID: 2799969
Username: LUKECAGE
WIOA Application ID: 2241209
Activity Code: 300 - Occupational Skills Training - Approved Provider List (ITA)
Activity Dates: 6/26/2018 - 6/30/2019

*** Provider:**

GSI Institution of Learning
[Select Provider]

*** Service, Course or Contract:**

Medical/Clinical Assistant
[Select Service, Course or Contract]

Provider Locations:

GSI Institution of Learning
6259 W Henderson Blvd
Sacramento, CA 94204
[Select Provider Locations]

Provider Contacts:

Marcus Welby
[Select Provider Contacts]

*** Occupational Training Code:**

31909200 - Medical Assistants
[Occupational Training Code]

Next >>

General Information | Service Provider | **Enrollment Cost** | Financial Aid | Enrollment Budget | Budget Planning | Closure Information

Enrollment Cost Information

300 - Occupational Skills Training - Approved Provider List (ITA)
GSI Institution of Learning
Medical/Clinical Assistant

Enrollment Summary:

Enrollment ID: 2799969
Username: LUKECAGE
WIOA Application ID: 2241209
Activity Code: 300 - Occupational Skills Training - Approved Provider List (ITA)
Activity Dates: 6/26/2018 - 6/30/2019

$ 1,380.00 Total costs are itemized below:

Total Training Costs $ 1,380.00
Available: *$1,380.00*
Obligated: *$0.00*

Tuition/Fee $ 1,000.00
Available: *$1,000.00*
Obligated: *$0.00*

Books $ 300.00
Available: *$300.00*
Obligated: *$0.00*

Tools $ 80.00
Available: *$80.00*
Obligated: *$0.00*

Other Costs $ 0.00
Available: *$0.00*
Obligated: *$0.00*

Comments

Next >>

General Information | Service Provider | Enrollment Cost | Financial Aid | Enrollment Budget | Budget Planning | Closure Information

Closure Information

Enrollment Summary:

Enrollment ID: 2799969
Username: LUKECAGE
WIOA Application ID: 2241209
Activity Code: 300 - Occupational Skills Training - Approved Provider List (ITA)
Activity Dates: 6/26/2018 - 6/30/2019

Last Activity Date: Today

Completion Code: None Selected

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

ID	Create Date	Subject	Action
No data found.			

<< Back | Finish | Delete

Case Note 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

Creating a Case Note

Case Note Template

Autofill by Template: None Selected

Case Note Summary

Case Note ID: 0

Username: OLIVIAPOPPY

User ID: 36943

Name: Olivia Poppy

Case Note Details

☐ Please check to suppress this Case Note

* **Contact Date:** Today

Type ID: 2767 Delete

* **LWDB/Region:** Golden Sierra Job Training Agency

* **Office Location:** 16028 El Dorado County

* **Program:** Title I - Workforce Development (WIOA)

App ID: 2243488 - Active

Creating a Case Note

Partner Program: None Selected

* **Subject:** 300 - Enrolled in Occupational Pottery Program

Contact Type: None Selected

* **Case Note Description:**

Enrolled Olivia in the Pottery Credential program at Crowder Community College. She provided her class schedule, which is attached.

[Clear Text]

Creating a Case Note

Message Options

☐ Create Message From Case Note on Save

Case Note Attachment(s)

Listed below are the documents associated with this case note. Click the *View* link below to view that particular item.

Results View: Summary | Detailed

Click a column title to sort.

☐ View Thumbnails

There are no documents for selected search criteria(s). Please change your search criteria.

[Add a Document | Scan a Document]

Save Save&Print Cancel

Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information

Case Notes:

[Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
44913	08/21/2019	300 - Enrolled in Occupational Pottery Program	

Page 1 of 1 Rows: 100

Activities / Enrollments / Services 6

Create Activity / Enrollment / Service

Search:

Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	328 - Occupational Skills Training (non-ETPL provider, non-formula) Napa Valley Adult School	W	Non-WIOA Special Grant 2287 - P2E Direct Services	N/A	09/09/2019	12/12/2019	Close
O	101 - Orientation No Provider Information	W	Non-WIOA Special Grant 2287 - P2E Direct Services	N/A	09/09/2019	09/09/2019	Close

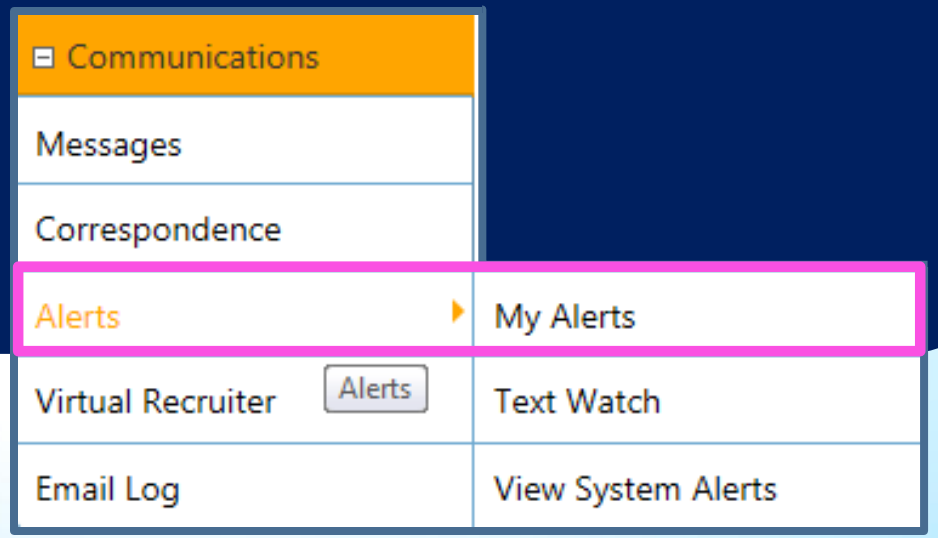
Activity Status: O = Open, C = Closed, S = System Closed, V = Voided

System Alerts

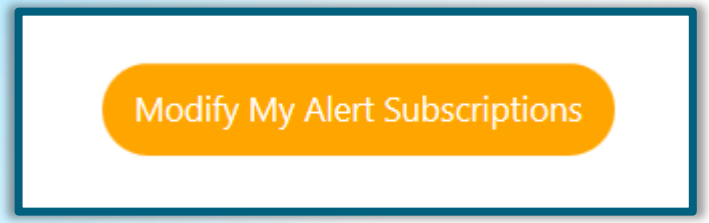
Alerts

Communications > Alerts> My Alerts

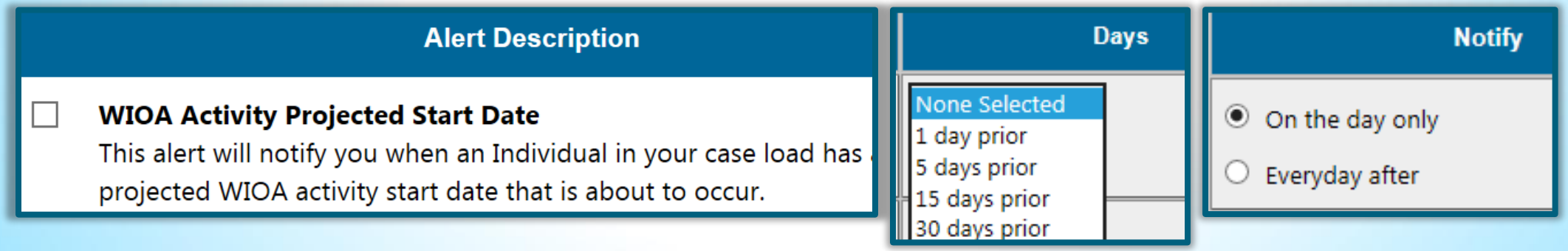
Alerts make staff aware of specific upcoming dates



My Alerts



- Click Modify My Alert Subscriptions
- Select any Alerts to set



Helpful Alerts

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

Workforce Innovation and Opportunity Act (WIOA) Alerts			
	Alert Description	**Days**	**Notify**
☑	**WIOA Activity Projected Start Date** This alert will notify you when an Individual in your case load has a projected WIOA activity start date that is about to occur.	1 day prior	○ On the day only ◉ Everyday after
☐	**WIOA Activity Projected End Date** This alert will notify you when an Individual in your case load has a projected WIOA activity end date that is about to occur.	None Selected	◉ On the day only ○ Everyday after
☐	**WIOA Soft Exit** This alert will notify you when an Individual in your case load is about to soft exit from the WIOA program.	None Selected	◉ On the day only ○ Everyday after
☐	**WIOA Male Participants about to turn 18** This alert will notify you when an Individual in your case load is about to turn 18 years of age.	None Selected	◉ On the day only ○ Everyday after
☐	**WIOA Younger Youth Goals About to Expire** This alert will notify you when an Individual with Youth Goals is about to expire where the status is set but attainment is pending.	None Selected	◉ On the day only ○ Everyday after
☐	**WIOA Participants expiring work authorization** This alert will notify you when an Individual in your case load whose authorization to work is about to expire.	None Selected	◉ On the day only ○ Everyday after
☐	**WIOA Followup Alert** This alert will notify you when an Individual in your case load has a follow-up date that is nearing.	None Selected	◉ On the day only ○ Everyday after
☐	**WIOA Literacy Numeracy Pre-Test has not been posted** This alert will notify you when a Youth is enrolled that meets the requirement for literacy numeracy testing has not had a pre-test posted within 60 days of their first youth service date.	None Selected	◉ On the day only ○ Everyday after
☐	**WIOA Pre-Applications Pending** This alert will notify you of pending WIOA Pre-Applications that are completed by individuals.	N/A	N/A
☐	**WIOA Literacy Numeracy Post-Test has not been posted** The following individual(s) in your case load who have Literacy Numeracy Pre-tests approaching their anniversary date in XX days XX (From Number of Days (e.g. 15)) as of SYSTEM DATE. You should update the literacy numeracy records appropriately.	None Selected	◉ On the day only ○ Everyday after
☐	**Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity** This alert will notify you when an Individual in your case load has not generated any new WIOA activity since the number of days specified.	None Selected	◉ On the day only ○ Everyday after

Participant Reports

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

Enrolled Individuals Report

This report will provide a summary and/or list of individuals enrolled in a program.

Individual Reports > Enrolled Individuals

By Region/LWIA

1

- Reports
- My Reports
- Summary Reports
- Detailed Reports
- Custom Reports
- Ad-Hoc Query Wizard
- Federal Reports
- Community College Reports
- Live Data

2

Individual Reports

Background Information
Display Background Information Reports

Enrolled Individual
Display Enrolled Individual Reports

Résumé
Display Résumé Rep

3

Enrolled:

Advanced

- List
- by Attending School Status
- by County/Parish
- by Disability Status
- by Employment Status at Participation
- by Grant by Zip Code
- by Migrant/Seasonal Farm Worker Types
- by One Stop Office
- by Region/LWIA
- by Selective Service Registration
- by Unemployment Status
- by Web Site Access Location
- by WIOA Partner Program
- by Working in Agricultural ONET Occupation Code Status
- by Zip Code
- by Age
- by Cookie Location
- by Desired Occupation
- by Educational Achievement
- by Gender
- by Hispanic Ethnicity
- by NEG Grant
- by Race
- by Registration Source
- by Staff Assigned
- by Ward/Borough/Township
- by WIOA 15 Percent Grant
- by Work Status
- by WP Special Program

Report Filters

1

Program

Program: Title I - Workforce Development (WIOA)

Customer Group:
- None Selected
- Adult
- Youth
- Dislocated Worker

Partner Program Status: ◉ Active ○ Inactive ○ All

Partner Program: None Selected

2

Location

Region/LWDB Status: ◉ Active ○ Inactive ○ All

Region/LWDB: (Press Ctrl to select multiple items)
- Contra Costa County Workforce Development Board
- Alameda County Workforce Development Board
- Foothill Workforce Investment Board
- Fresno Area Workforce Investment Corporation

Office Status: ◉ Active ○ Inactive ○ All

Office Location: (Press Ctrl to select multiple items)
- None Selected
- 12600 Fresno West (WSB)
- 12608 Fresno North (WSB)
- 12630 Fresno (WSB)

3

WIA-Specific

Grant Status: ◉ Active ○ Inactive ○ All

Grant Type: NonWIOA Special Grant

Available Grants: (Press Ctrl to select multiple items)
- 399 - 2040 - Youth Ex-Offender Participant
- 402 - AB 2060 3.0 Participants
- 414 - P2E Direct Services
- 415 - P2E Supportive Services / Earn and Learn

4

Date

Date Filter: Active

Date Range: Current Program Year

From: 07/01/2018 (mm/dd/yyyy)

To: 06/30/2019 (mm/dd/yyyy)

Run Report

Results

Enrolled Individuals - By Region

- Participation Date: 3/6/2018 to 3/12/2018
- Report Type: Title I - Workforce Development (WIOA)
- Customer Group: Adult
- Region/LWIA Name: Alameda County Workforce Investment Board

Region	Total	% Total
Alameda County Workforce Investment Board	1	100.00 %
Region	Total	% Total
		Total Rows: 1

Enrolled Individuals - List

- Participation Date: 3/6/2018 to 3/12/2018
- Report Type: Title I - Workforce Development (WIOA)
- Customer Group: Adult
- Region/LWIA Name: Alameda County Workforce Investment Board

User Name	State ID	App ID	First Name	Last Name	Age at Participation	City	State	Country	Office Location	Agency Code	Agency Name	Assigned Case Mgr	Participation Date	Exit Date	Prior Participation	Map
25728243	451427200	17757938	Omar	Adiong	49	Hayward	CA	US	ALA Tri Cities AJCC	W10	W10 -ALA	Shirley Calvert	03/09/2018		Yes	Map
User Name	State ID	App ID	First Name	Last Name	Age at Participation	City	State	Country	Office Location	Agency Code	Agency Name	Assigned Case Mgr	Participation Date	Exit Date	Prior Participation	Map

Total Enrolled Individuals: 1

Services Provided Report

This report shows information about specific services provided to individuals by staff members.

Services Reports > Services Provided Individuals

By Services

1

- Reports
- My Reports
- Summary Reports
- Detailed Reports
- Custom Reports
- Ad-Hoc Query Wizard
- Federal Reports
- Community College Reports
- Live Data

2

Services Reports

Services Provided Employer
Display Service Provided Employer Reports

Services Provided Individuals
Display Services Provided Individuals Reports

3

Service:

Advanced

- List
- by Activity Completion Status
- by Education Level
- by Ethnicity
- by Grant
- by MSFW Status
- by Provider
- by Region/LWIA
- by Services
- by Staff Edit
- by Work Status
- by Access Location
- by County
- by Enrollment Characteristics
- by Gender
- by Individual
- by Office
- by Race
- by Service Assistance Type
- by Staff Assigned
- by Staff Reported
- by Zip Code

Basic

- by Age
- by Disabled Veteran Status
- by Potential Eligibility for Veteran Benefits
- by Veteran Campaign Status
- by Disability Status
- by Discharge Status
- by Selective Service
- by Veteran Status

Report Filters

1

Program

Program: Title I - Workforce Development (WIOA)

Customer Group:
- None Selected
- Adult
- Youth
- Dislocated Worker

2

Location

Region/LWDB Status: Active Inactive All

Region/LWDB: WIOA Statewide Grant Contractor

Office Status: Active Inactive All

Office Location: ELD ABLE-DISABLED ADVOCACY, INC.

3

Activity

Activity/Service Code:
(Press Ctrl to select multiple items)

- 218 - Internships
- 219 - Work Experience
- 221 - Financial Literacy Education
- 222 - English Language Learner (ELL)
- 224 - Pre-Apprenticeship Training
- 225 - Enrolled in Post-Secondary Education
- 226 - Reading and/or Math Testing

4

WIA-Specific

Grant Status: Active Inactive All

Grant Type: NonWIOA Special Grant

Available Grants:
(Press Ctrl to select multiple items)

- 399 - 2040 - Youth Ex-Offender Participant
- 402 - AB 2060 3.0 Participants
- 414 - P2E Direct Services
- 415 - P2E Supportive Services / Earn and Learn

5

Date

Date Filter: Actual Begin Date

Date Range: Current Program Year

From: 07/01/2018 (mm/dd/yyyy)

To: 06/30/2019 (mm/dd/yyyy)

Reset Dates

Run Report

Services Provided Individuals - Results

Services Provided Individuals - All Services

- Program: Title I - Workforce Development (WIOA)
- Region/Lwia: WIOA Statewide Grant Contractor
- Office: ELD ABLE-DISABLED ADVOCACY, INC.
- Grant Type: Statewide Adult
- Grant: 696 - 1152 - DEA PY 2018-19
- Veteran Information From: Both
- Date Field: Actual Begin Date
- Start Date: 5/1/2019
- End Date: 8/12/2019

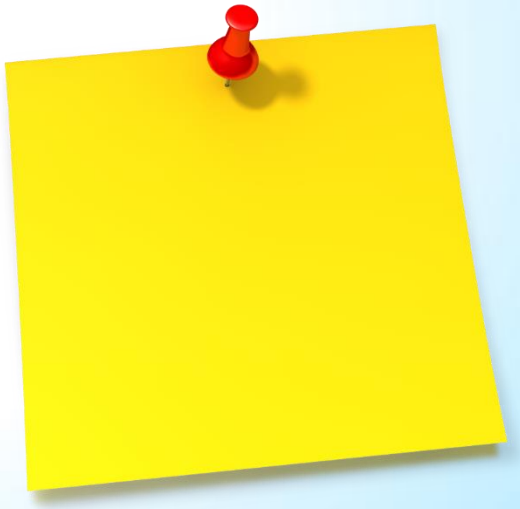
Activity/Description	Distinct Users	Total Services	% of Total
101 - Orientation	1	1	2.38 %
102 - Initial Assessment	7	7	16.67 %
103 - Provision of Information on Training Providers/Performance Outcomes	7	7	16.67 %
200 - Individual Counseling	10	15	35.71 %
202 - Career Guidance/Planning	2	2	4.76 %
205 - Development of IEP/ISS/EDP	7	7	16.67 %
218 - Internships	3	3	7.14 %
Activity/Description	**Distinct Users**	**Total Services**	**% of Total**
	37	**42**	**100%**

UserName	State ID	Region / LWIA	Office	Office of Responsibility	First Name	Last Name	City, State, Country	Service	Completion Status	Provider	Staff Created	Create Date	Actual Begin Date	Projected Begin Date
36721	34145	WIOA Statewide Grant Contractor	ELD ABLE-DISABLED ADVOCACY, INC.	ELD ABLE-DISABLED ADVOCACY, INC.	Tito	Lolo	Sacramento, CA US	218 - Internships	Successful Completion	One Stop Offices	Cuellar-Lopez, Monica	05/31/2019	05/31/2019	
36750	34166	WIOA Statewide Grant Contractor	ELD ABLE-DISABLED ADVOCACY, INC.	ELD ABLE-DISABLED ADVOCACY, INC.	Tim	Morgan	Sacramento, CA US	218 - Internships	Successful Completion		Blevins, Steven	06/12/2019	06/12/2019	
36750	34166	WIOA Statewide Grant Contractor	ELD ABLE-DISABLED ADVOCACY, INC.	ELD ABLE-DISABLED ADVOCACY, INC.	Tim	Morgan	Sacramento, CA US	218 - Internships	Successful Completion	Cheese Institute of America	Blevins, Steven	06/12/2019	06/12/2019	
UserName	**State ID**	**Region / LWIA**	**Office**	**Office of Responsibility**	**First Name**	**Last Name**	**City, State, Country**	**Service**	**Completion Status**	**Provider**	**Staff Created**	**Create Date**	**Actual Begin Date**	**Projected Begin Date**

Total Rows : 3

Individual Case Notes Report

These reports retrieve case notes that have been entered by staff in an individual's profile.



Case Management Reports > Documentation

Individual Case Notes

1

- Reports
- My Reports
- Summary Reports
- Detailed Reports
- Custom Reports
- Ad-Hoc Query Wizard
- Federal Reports
- Community College Reports
- Live Data

2

Case Management Reports

Case Load
Display Case Load Reports

Case Load - Non-WIOA
Display Case Load - Non-WIOA Reports

Case Load - WIOA
Display Case Load - WIOA Reports

Documentation
Display Documentation Reports

Payment
Display Payment Reports

Predictive
Display Predictive Reports

3

Case Notes:

Advanced

- Employer
- Provider
- Individual

Report Filters

1

Report Type

Report Type:
- Exact Match
- Includes

Case Notes

Case Note Subject: 328

System Case Notes: (Where Contact Type = 'Form Insert') ◉ Exclude System Case Notes ○ Include System Case Notes

2

Program

Program Status: ◉ Active ○ Inactive ○ All

Program: (Press Ctrl to select multiple items)
- Title I - Workforce Development (WIOA)
- Title III - Wagner-Peyser (WP)
- Trade Adjustment Assistance (TAA)

3

Location

Region/LWDB Status: ◉ Active ○ Inactive ○ All

Region/LWDB: (Press Ctrl to select multiple items)
- County of Yolo Health and Human Services Agency
- City of Anaheim Workforce Development Division
- WIOA Statewide Grant Contractor
- Allan Hancock Joint Community College District

Office Status: ◉ Active ○ Inactive ○ All

Office Location: (Press Ctrl to select multiple items)
- RCF Richmond Community Foundation
- RSE Rising Sun Energy Center
- RUBICON PROGRAMS, INC.
- RURAL HUMAN SERVICES INC.

4

Date

Date Range: Last 30 Days

From: 08/30/2018 (mm/dd/yyyy)

To: 09/28/2018 (mm/dd/yyyy)

Reset Dates

Run Report

Results

Case Management Report - Case Notes - Individual Case Notes Report

Program: Workforce Innovation and Opportunity Act (WIOA) Program
LWIA/Region: WIOA Statewide Grant Contractor
Office: L & R Career Center
Include System Case Notes: No
Date Range: 02/14/2017 - 03/15/2017

Userid	Individual	Created By	Create Date	Contact Date	Last Edited By	Last Edit Date	State ID	Case Subject	Case Notes
32910	Test, John	Rose, Rianna	3/7/2017	3/7/2017	Rose, Rianna	3/7/2017	31866	328 Case Note Test	Case Note Test.
32914	Tester, John	Rose, Rianna	3/13/2017	3/13/2017	Rose, Rianna	3/13/2017	31869	328 Training Activity	Training Activity
Userid	Individual	Created by	Create Date	Contact Date	Last Edited By	Last Edit Date	State ID	Case Subject	Case Notes
Total Rows: 2									

Save to My Reports

1

Date

Date Filter: Participation Date

Date Range: Last 7 Days

From: 09/26/2018 (mm/dd/yyyy)

To: 10/02/2018 (mm/dd/yyyy)

Reset Dates

The date range selection of "Today" will retrieve real time data.

Otherwise, data may be up to 24 hours behind.

Run Report

[Save to My Reports]

2

CalJOBS - My Reports - Internet Explorer

https://www.caljobs.ca.gov/reports/myreports/myreports.asp?pu=True&ff_mode=buildmyreportsearchurl&ff_itemcode

Please enter in a description for this report:

Save Close

Do Not Share: Share with everyone that has access to this report:

3

Reports

My Reports

Summary Reports

Detailed Reports

4

My Reports:

Report Description	Action	Select
Enrolled Individual - Adult	Update Filters Display Report Edit Delete Schedule	

Part 2B Summary

- Completed the Individual Employment Plan (IEP)
- Added Activity Codes and Case Notes
- Reviewed Case Assignment and System Alerts
- Demonstrated how to configure and run Participant Reports

Questions