Title Slide
AB1111 CalJOBS℠ Participant Training Webinar Series
Part 1: Intro to CalJOBS and Individual Registration

Slide 2
Housekeeping

Slide 3
Agenda
Day 1 – Tuesday, February 25
1:30PM – 3:30PM
- Introduction to CalJOBS and system navigation
- Customization and navigation tips and tricks
- Completing Individual Registration

Slide 4
Agenda
Day 2 – Wednesday, February 26
9:30AM – 11:30AM
- Completing the WIOA Title I Program Application
- Creating Participation

LUNCH BREAK 11:30AM-1:00PM

Day 2 – Wednesday, February 26
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, February 27
1:30PM – 4:00PM
- Tracking Credential Attainment and Measureable Skill Gains
- Closing activities and using the Closure Form
- Program Exit and Follow Ups
- Participant Reports

Slide 6
AB1111 Data Guidebook and Reporting Requirements Webinar
State funding requirements, capturing and reporting data, AB1111 activity codes, new data fields, quarterly reports
Friday, April 3, 2020
1:00-2:30PM (Pacific Time)

Slide 7
Day 1 Objectives
- Provide an introduction to CalJOBS

- Identify basic CalJOBS customization and navigation tips and tricks
- Demonstrate how to complete Individual Registration

Slide 8
Introduction to CalJOBS

Slide 9
CalJOBS
CalJOBS is a virtual one-stop labor exchange website. The CalJOBS system is an online resource to help job seekers and employers navigate California's workforce services by providing employment and labor market information. The CalJOBS system also allows staff access to case management, customer tracking, and follow-up services. As such, CalJOBS serves as California's system of record for data collection for our workforce development community.

Slide 10
Introduction to CalJOBS
CalJOBS is utilized by three main customers:
- Employers
- Individuals (or job seekers)
- Staff

Slide 11
Employer Services
Here are a few of the services available to Employers:
- Post jobs
- Recruit candidates for a job
- Access Labor Market Information
- Send correspondence to job seekers

Slide 12
Individual Services
A few features available to individuals within CalJOBS include:
- Build a résumé- A registered individual can choose from several different methods to build a résumé in CalJOBS.
- Search for jobs- use a variety of search options to find the right job
- Set up a Virtual Recruiter- allows job seekers to automate the task of searching for available job openings

Slide 13
Image is a building of an America's Job Center of California.

An individual or an employer can go to a local America's Job Center of California (AJCC) for assistance in finding a job, learning about the possibilities of job training, or posting a job and searching for candidates.

Slide 14
Staff Services
This list we've provided is not exhaustive, but we want to give you an idea of how Staff can use the system:

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

Slide 15
CalJOBS is a valuable tool that can link qualified job seekers with employers, help individuals to find job training, and assist staff to manage WIOA program applications, eligibility, services, and reports, all with the end goal of improving employment outcomes in the State of California.

Slide 16
How will you use CalJOBS for AB1111?
The success of a new program is often measured through data collection. In order to capture and report this data, all AB1111 grant recipients must use CalJOBS.
Document Participant reporting data:
- Complete Individual Registration
- Complete the WIOA Title I application
- Enroll Participants into your program
- Track services
- Run reports

Slide 17
How will you use CalJOBS for AB1111?
All relevant data must be entered into CalJOBS in a timely manner.
Data in CalJOBS must coincide with the Quarterly Narrative Report.
Data not captured in CalJOBS will be captured through the Quarterly Narrative Reports and Supplemental Tracking.
Grant Code (Grant Name) is 2288-AB1111

Slide 18
AB1111 CalJOBS Date Guidebook
Activity Codes required for AB111
Work arounds in the Title I Application
New data fields requirements for AB1111
Other case management items
AB1111 CalJOBS Date Guidebook training is scheduled for Friday, April 3, 2020 from 1:00PM to 2:30PM (PT)

Slide 19
CalJOBS Navigation and Layout

Slide 20
There are two CalJOBS websites:
The Live Website is managed by the CalJOBS Operations Unit. This site is used by job seekers, employers, and staff and has real, live data.

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

Slide 21
Image is of CalJOBS home page
When it comes to registration in CalJOBS, it is encouraged that individuals register themselves in the system. They simply select the Registered New User link at the top right of the home page of www.caljobs.ca.gov, and follow the instructions to create a user name and password, and complete their registration.
In addition, you, as a staff member, can complete registration on behalf of an individual. This is what we will demonstrate in this module.

Slide 22
Image is of CalJOBS home page
To register an individual, go the www.caljobs.ca.gov homepage or "splash page".
Login by entering your staff information into the fields: Username and Password. Select the "Sign In" button to the right.

Slide 23
Image is of the Staff Sign-in Notice that appears after you select the "Sign In" button.
Read the Staff Sign-in Notice, select "I Agree".

Slide 24
CalJOBS Navigation and Layout
Image is of the CalJOBS My Staff Workspace page.
After you sign in to CalJOBS, the first screen you will see is **My Staff Workspace**. There are six key areas:
1. At the top left corner of the screen there is a hamburger Menu that you can select, and it will expand or collapse the gold navigation menus on the left hand side.
2. To the left of the screen, there are gold navigation menus going vertically down the page. The gold navigation menus are also customizable if you go to My Staff **Resources > My Preferences > Configure what menu groupings appear**.
3. At the top of the screen, there are short-cut links (**Home, My Dashboard, Sign Out, etc**). These links follow throughout all navigation of CalJOBS.
4. At the top right of all screens there is a magnifying glass icon for conducting a Quick Search. This allows staff the ability to quickly conduct an individual or employer search regardless of where they are in the system.
5. Near the top of the page, there are blue and gray tabs going horizontally across the page (**My Dashboard, How We Can Help You, etc**.), which is another way to get to the same pages that we see on the left menu. Left menus or tabs –they accomplish the same thing.

6. The widgets that fill the rest of **My Staff Workspace** are shortcuts to frequently-used tasks and pages. The widgets are customizable, so you can move them, collapse them, and delete them per your preferences.

Slide 25
Services for Workforce Staff
The Services for Workforce Staff is a left hand menu that contains navigation to many important aspects of CalJOBS. It is from this menu that you can select to:
Create an Individual (registration)
Assist an Individual
- Manage their profile, complete Program applications, add case notes, etc.
Manage Case Assignment
- Set up case management groups so you can assign case managers to your participants

Slide 26
My Staff Account

Within the My Staff Workspace left navigation menu, we can use the **My Staff Account** to access your CalJOBS account information.

From there you can edit account information and customize the content you are interested in, such as landing pages, display options, or the number of individuals recently assisted you would like displayed on the individual search page.

Slide 27
My Staff Resources
You can also customize the left hand navigation menu by hovering over **My Staff Resources** and selecting **My Preferences**.

Slide 28
Staff Online Resources
The Staff Online Resources tool is located under the Other Staff Services tab.
Access System Guides and EDD CalJOBS Training Materials.

Slide 29
Lifecycle of a Participant
Step 1: Register individual in CalJOBS if they aren't already
Step 2: Complete a WIOA Title I Application to establish eligibility for AB1111
Step 3: Create Participation to officially enroll the individual into your AB1111 program
Step 4: Add additional services you provide, including training or supportive services
Step 5: Enter any credentials received and measurable skill gains
Step 6: Close all activity codes once they complete your program or you are done providing services under AB1111
Step 7: Complete the Closure Form within the participant's program application
Step 8: Enter follow-up activities or information if applicable

Slide 30

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

Slide 31
What is Individual Registration?
Gives job seekers access to wide range of CalJOBS labor exchange features, including a resume builder, access to job postings, and LMI.

Individuals or staff members complete a form with required data fields that collect information on the individual users.

It is required for **all** participants you serve with AB1111 and is **separate** from the WIOA Title I Application.

Slide 32
What Data is collected at Registration?
- Name and SSN
- Primary address and phone number
- Demographics and public assistance
- Education and employment
- Farmworker and military service

Slide 33
Demo Time!

Slide 34
First, Search for the individual

Before we begin creating an individual, the first thing you will need to do is "Search for an Individual" to verify that the individual you are assisting has not been registered with the system before. And the way you would do that is by locating **Services for Workforce Staff** section in the left hand menu. Hover over **Manage Individuals**, located in the first box under the Services for Workforce Staff tab. A floating menu will appear and select the last option **Assist an Individual**.

Slide 35
Search for and Individual
Image shows the Assist and Individual webpage.
Here, you can either search for an individual by social security number or first name, last name, and the last 4 numbers of the individual's social security number.

Slide 36
Search for an Individual

If the individual cannot be found in the system after you complete the search, you will need to create an individual profile.

Slide 37
Register an Individual

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

On the left menu, under the gold menu heading **Services for Workforce Staff**, hover over **Manage Individuals**, and select **Create an Individual**.

Slide 38
Individual Registration
On the resulting screen, select the Comprehensive Registration link.

Slide 39
CalJOBS is ready to assist you as you complete the required registration fields. Please note the red asterisks, blue text, question mark icons, and underlined links (e.g., "Find zip code") that will help you complete the individual registration.

Complete the information in the Login Information fields. When creating a Username and Password, be sure to write it down to ensure your individual has the correct login information. In addition, refer to the blue text for creation guidelines. The system defaults the Password field to Password1@. You can keep this generic password, but the individual will need to change the password after their initial login.

In the Social Security Number section, enter the individual's SSN. If the individual does not have a SSN, registration can still be completed, and staff can simply enter a pseudo SSN. Refer to Workforce Services Information Notice WSIN12-37 for guidance.

Slide 40
Primary Location Information
Enter the individual's zip code using the Find Zip Code link if necessary, or simply type it into the box. Next, select the appropriate option for the **Are you authorized to work in the United States** question. If you select "No" you will be able to continue with registration.

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

In the **Demographic Information** section, enter the individual's Date of Birth.

Slide 41
Demographic Information
If you select "Male" for the **What sex were you assigned at birth, on your original birth certificate** question, you must complete the following question, **Have you registered with the Selective Service**? Notice your options. You may use the Selective Services web sitelink to confirm if the individual is or is not registered with the Selective Service. If "Female" is selected, the selective service question is not applicable.

Note: Selective Service is not required for AB1111 program; however, if the participant were to be co-enrolled into the WIOA Title 1 program, then Selective Service would be required.

The following two questions, **How would you describe yourself** and **What would you consider your sexual identity to be** are related to gender and sexual identity, and are required if you are serving the target population, transgender and gender nonconforming individual.

Leave the Scan Card ID field blank, unless your office uses scan cards. After completing the information on this first page, select the "Next" button at the bottom to continue.

Slide 42
Name
Enter the individual's **First** and **Last Name** (Middle Initial is optional). Select the "Next" button.

Note that you can select the "Back" button to move back to the previous step of registration. If you select this, some of the information entered on the previous step may disappear.

Slide 42
Residential Address
Select the "Yes" radio button if the individual is currently homeless. If "Yes" is selected, you will receive the pop-up message on the slide. An address is required, so please enter the shelter address, location they last stayed, or even your organization address.

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

Slide 43
Mailing Address
If you select "Use residential address" for the **Mailing Address**, the individual's residential address will fill in the fields below. The system will attempt to standardize the address to a known address listing for the area. Note that if the system states that the address is NOT standardized, you may still move further regardless of that message.

Select the "Next" button.

Slide 44
Phone Numbers
The next step of registration is Phone Numbers. Enter individual's **Primary Phone** and **Primary Phone Type**. The system does have the capability to both text and e-mail notifications to individuals regarding job postings and employer contacts. You can enter information in **Text Message Cell Phone Number** should the individual wish to receive text notifications.

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

Slide 45
Preferred Notification Method
Next, for the **Preferred Notification Method**, choose from the dropdown menu how the individual would like to receive notifications from the CalJOBS system. This could include messages from staff, employers, or system alerts.

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

When finished, select the "Next" button to continue with Individual Registration.

Slide 46
Citizenship
For the Citizenship question in the **Citizenship** area, select the appropriate answer. Please note that if you select "None of the above", you will still be able to continue with registration.

Note that if *U.S. Permanent Resident or Alien/Refugee Lawfully Admitted to U.S.* is selected, additional fields will populate. If *U.S Permanent Resident* is selected, the **Alien / USCIS Number** is required. If *Alien/Refugee Lawfully Admitted to U.S.* is selected, both the **Alien / USCIS Number** and **USCIS Expiration Date** is required.

Slide 47
Disability
Answer the questions according to your individual's self-disclosure. As the blue help text notes, if they choose to self-disclose a disability, they may be eligible for additional support services and programs.

Note: If you are serving the target population, individuals with development or other disabilities, you need to select "Yes."

For the question, **Do you have a disability?**, answer according to your individual's disclosure. Note: If you are serving the target population, individuals with development or other disabilities, select "Yes."

If you select the *I do not wish to answer* option, you will receive a pop-up stating that by disclosing that you have a disability, you may be eligible for additional services. In addition, all of the subsequent questions will be marked as *Not Specified*.

Answer the remaining questions. Once completed, select the "Next" button.

Slide 48
Education Information
On the next step of registration, enter **Education Information** by choosing the most appropriate answers in the dropdown menus. Both questions are mandatory.

When done, select the "Next" button.

Slide 49
Employment Information and Farm Worker Information
For the **Unemployment Eligibility Status** question, if your individual answers "Claimant" or "Exhaustee", an additional set of mandatory questions will populate (see top right green box "1"). Answer according to your individual's disclosure. The *information icon* has helpful information in answering these questions if you are unfamiliar with the terms.

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

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

Note: If you are serving the target population, migrants or seasonal farmworkers, you should select "Yes" for the **Have you worked as a farmworker in the last 12 months question.**

Slide 50
Job Title
As you type the individual's desired job title, a list of auto-complete suggestions will appear in a drop-down list for selection. Select the appropriate title in the drop-down. If the individual's job title does not generate any auto-complete suggestions, you may try to enter an alternative name for that job title. If the system continues to not provide a matching job title, you may enter a unique job title.

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

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

Select the "Next" button to continue.

Slide 51
Ethnic Origin
Complete the required fields in the **Ethnic Origin** section. If you select the check box for certain options in the Race field (ex: Hawaiian/Other Pacific Islander), additional categories may appear.

Select the "Next" button to continue.

Slide 52
Military Service
For the question, **Are you currently in the military, a veteran or the spouse of a veteran?**, when your individual answers "Yes", additional veteran questions will

populate (see "Question 1","Question 2", and so on). If the answer is "Yes" to any of these additional questions, another set of questions may populate to gather more information. When you select "Yes" to **Question 1**, an additional section titled **Transitioning Service Members** will populate and is required. When you select "Yes" to **Question 2** or **Question 4**, an additional section titled **Veteran Information** will populate and is required. See the next slide for the additional **Veteran Information** required.

Select the "Next' button when finished with this section.

Slide 52
Public Assistance
The last step of the Individual Registration is the **Public Assistance** questions. If your individual answers "No" to the first 5 questions, an additional 2 mandatory questions populate at the bottom (highlighted box). This section will help determine eligibility for certain program services based on low income.

If any of the 5 questions are answered as "Yes", the additional income questions will not populate, as a "Yes" will make an automatic low income determination.

Once completed, select the "Finish" button and **registration in CalJOBS is complete**!

Slide 53
Image is the CalJOBS webpage after registration is completed. The sections we will cover are **Staff Options** and **What would you like to do next?**

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

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

Slide 54
Currently Managing
Once you finish registering an individual, you will have a new left hand menu titled **Currently Managing**. The Currently Managing means that you are assisting and managing the individual's profile.

The **Currently Managing** menu will also appear any time you search for and "assist" an individual. If you click on the individual's name, the first option in the Currently Managing menu option, you will navigate to their General Information tab, Summary tab, Programs tab, depending on your profile settings. This is helpful if at any time you want to get back to a "home base" while assisting them.

If you select the **Release Individual** option, the system will prompt you to confirm that you would like to stop assisting them and their profile. This means that you are no longer managing their profile.

If you select **Assist a new Individual**, the system will release the current individual and navigate you to the Individual Search screen to search for and assist a new individual. The new individual you assist will now be the profile you are working on.

<u>**Slide 55**</u>
Individual Folders
When assisting an individual or clicking on their name from the Currently Assisting menu, you will see a set of three folders across the top of the page.

The main folders include: **My Individual Profiles**, **My Individual Plans**, and **Staff Profiles**. Once expanded, these 3 main folders include additional subfolders and tabs.

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

One of the main areas you will be navigating to are within the **Staff Profiles** main folder. Here is where an individual's case notes, documents, program application, and case management tools like the IEP and OAS are housed.

<u>**Slide 56**</u>
Result of completed Individual Registration
Upon completion of individual registration, a *Title III Wagner-Peyser-Registration Only* program application is created.

We will find this application when navigating to the individual's **Programs** tab. We will explain the Programs tab in more detail in the following sections. We will not review the Title III Wagner-Peyser-Registration Only program application, however we do like to mention that it will appear in the same section where the Title I program application will be housed.

<u>**Slide 57**</u>
Day 1 Summary
In this training, we:
- Provided an introduction to CalJOBS
- Identified basic CalJOBS customization and navigation tips and tricks
- Demonstrated how to complete Individual Registration

<u>**Slide 58**</u>
Questions
For any questions concerning this module, please contact the Capacity Building Unit at CBUTraining@edd.ca.gov.