

## **Title Slide**

AB1111 CalJOBS<sup>SM</sup> Participant Training Webinar Series  
Part 2A: Title I Application and Participation

## **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**

Part 2A Objectives

- Discuss the WIOA Title I Application
- Demonstrate how to complete the Title I Application for AB1111
- Discuss Participation/Enrollment
- Demonstrate how to create Participation

### **Slide 8**

WIOA Title I Application

### **Slide 9**

What is the Title I Application?

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

### **Slide 10**

What Data is Collected in the Title I Application?

While much of the information from individual registration pulls into the Title I Application, there are many additional questions that require attention:

- Program eligibility date(s) – Adult, DW, Youth, Incumbent Worker
- Veteran information – Transitioning service member, General Veteran Info.
- Employment information – UI Status, Long term unemployed
- Education information – School status, highest school grade completed
- Public Assistance, Barriers, and Household Income – TANF, GA, ELL, etc.
- Eligibility for WIOA Special Grants and Non-WIOA Special Grants

### **Slide 11**

CalJOBS Business Rules

30-Day Lock-Down

There are some CalJOBS Title I application business rules that are helpful to know about before starting to work and enter data into the application. One of those rules is the 30-day lock down rule. This ensures data integrity and makes it very important to enter participant data in as real-time as possible.

The “30-day lock-down” rule:

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

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

### **Slide 12**

CalJOBS Business Rules

Partial save = Not enrolled

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

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

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

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CalJOBS Business Rules

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

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

### **Slide 14**

AB1111 Program Eligibility

- Disconnected Youth
- Women seeking training or education to move into nontraditional fields of employment
- Displaced workers and long-term unemployed
- Unskilled or under-skilled, low-wage workers
- English language learners
- Economically disadvantaged individuals
- CalWORKS participant

To qualify for the AB1111 program, a participant must meet one of these eligibility criteria. We will discuss where in the Title I application can enter this eligibility information.

### **Slide 15**

AB1111 Program Eligibility-Continued

- Justice involved individuals
- Veterans
- Native American
- Migrants or seasonal farmers
- Individuals with development or other disabilities
- Immigrants
- Persons over 50 years of age
- Other populations ( i.e., displaced homeworkers, homeless individuals, foster youth, transgender and gender nonconforming individuals)

### **Slide 16**

## Completing a WIOA Title I Application

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

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#### Assisting an Individual

After logging into the system, the first page you will see is **My Staff Workspace**. On the left navigation menu you will see a gold tab called **Services for Workforce Staff**. In that tab, hover over **Manage Individuals** and select **Assist an Individual** from the fly-out menu, as shown by the lower arrows.

Or, if you have previously assisted individuals, you can choose from the recently assisted list of individuals in the **Saved Lists** widget, shown in the top circle.

### Slide 18

#### Quick Assist

There are different search options including **Quick Assist** and **General Criteria**.

Also, there is a **Quick Search** at the top right corner of every page.

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

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Still, your search results may give you more than one individual user. Find the individual you would like to create a WIOA application for, and select the Programs Tab link in the far right **Action** column.

Note the Veteran indicator with the flag in the User Name column.

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Next, you may see a **Right to Work Verification** screen. Staff can enter the information, or bypass by selecting the Remind me later link at the bottom of the page.

### Slide 21

#### Creating a Title I Application

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

Here you will see a summary of the various programs an individual can be enrolled.

Find the ribbon with a purple tab titled, **Title I- Workforce Development**, and select the Create Title I- Workforce Development (WIOA) Application link.

### Slide 22

#### Title I Wizard keeps track of application progress

This begins the **WIOA Wizard**, a step-by-step data entry process. As you complete the required fields in each step, a green checkmark will appear on the WIOA Wizard. In addition the wheel in the top right corner will progress as you complete each step.

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

In the Workforce Innovation and Opportunity Action (WIOA) section, enter the **Application Date**, and enter a date in at least one of the WIOA program options. In our example, we entered a date in the **Adult Eligibility Date** field. You can enter a date for as many programs that the individual is eligible for. For AB1111, if a participant is 18+ years old then it is recommended to select Adult. Only use the Youth option if they are under the age of 18.

Some important things to keep in mind:

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

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

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

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

#### **Slide 24**

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

For **Non-Local Area recipients** of AB1111, the LWDB dropdown will say “WIOA Statewide Grant Contractor” and your organization name should populate in the Office Location and Office Location of Responsibility drop-downs.

If your Area uses Agency Codes, select the Select Agency Code link to search for the appropriate code.

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

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

Ensure that the **Residential Address** information is up to date and edit if necessary. In the Mailing Address section, there is an option to select if the mailing address is the same as the residential address. If it is the same, check the “Check here to use the residential address information” box. If the Mailing Address is not the same as the residential address, enter the correct **Mailing Address**.

#### **Slide 26**

Verify Links

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

Let's take this time to talk about the Verify links within the application. CalJOBS allows you to document data elements, per your local organization business rules, via the Verify links. If you choose to use a Verify link, please be sure to have the document in the physical case file or uploaded to CalJOBS. If you do not choose to verify an item, the system will default to "Documentation in Case File" for that data element.

### **Slide 27**

#### Scan/Upload Links

- Allow you to scan or upload documents to store documentation electronically in CalJOBS
- Check your organization's business rules

Let's take this time to talk about the Scan and Upload links within the application. CalJOBS allows you to scan or upload document data elements electronically, per your local organization business rules, via the Scan or Upload links. The Scan link will only work for Area's who utilize the scanning feature in CalJOBS. This requires additional software and technology.

The Upload option does not require any additional software or technology. To upload a document in the application, select the Upload link for the verification document you would like to upload.

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#### Scan/Upload Links

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

### **Slide 29**

#### Scan/Upload Links

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

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

### **Slide 30**

#### Participant Documents

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

### **Slide 31**

Finishing up the **Contact** tab, in the Phone Information section enter the **Primary Phone Number** and select the **Primary Phone Type** from the drop-down.

The Email Information section is optional.

If the individual has one or more alternate contacts, it is helpful to add this for the purposes of locating individuals or obtaining updated information. To add an alternate contact, select the Add New Contact link.

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

### **Slide 32**

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

For the **U.S Citizenship Status** question, if the individual’s status is not “Citizen of U.S or U.S Territory”, “U.S. Permanent Resident”, or “Alien/Refugee Lawfully Admitted to U.S.”, select “None of the above”. The other options are not a requirement for AB1111 and you will still be able to move forward with the application.

### **Slide 33**

Continuing with the **Demographic** tab, review the fields for accuracy.

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

However, if you are only serving the individual with AB1111, Selective Service registration is not required. You may select “No” for the **Registered for the Selective Service** question and still be able to move forward in the application. (This screenshot is for a female applicant, therefore the question is read-only as “Not Applicable”).

If the **Considered to have a disability** field is “Yes”, additional required questions will populate below. Note, if you are serving the target population, individuals with developmental or other disabilities, be sure to select “Yes” and complete the subsequent questions that follow.

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

### **Slide 34**

Moving on to the **Veterans** tab. This information pulls from individual registration, but their current status may have changed. Be sure to enter the appropriate information. Select the “No” radio button if your individual is not a **Transitioning Service Member**. If they are a Transitioning Service Member, select the “Yes” radio button and complete the subsequent fields that generate as mandatory.

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

### **Slide 35**

Continuing with the Veteran tab, in the **General Veteran Information** section, answer the required fields. Some of the information may have auto-filled from individual registration; please check for accuracy.

If the “Yes<= 180 days” or “Yes, Eligible Veteran” radio button is selected in the **Eligible Veteran Status (WIOA specific)** field, subsequent fields become mandatory (service begin and end dates and disabled veteran information).

If the individual is not a Veteran or Eligible Person, select the “No” radio button.

Once the required fields have been answered accurately, select the “Next” button to continue.

### **Slide 36**

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

If you are serving the target population, disconnected youth, be sure to select “Not Employed” for **Employment Status**.

If you are serving the target populations, unskilled, under-skilled, and/or low-wage workers, be sure to select “Yes” for **If Employed, Individuals is Under-Employed**.

If you select that the individual’s **UC Eligibility Status** is “Claimant” or “Exhaustee,” the system requires that you must complete the **Claimant was Referred By** and the **Claimant has been exempted from work search** fields. This set of questions is referring to the individual’s unemployment insurance status and whether they received information that they are required to attend one of the Unemployment Insurance workshops.

In addition, the “i” icon is very helpful with answering questions in the Employment tab.

### **Slide 37**

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

The wage and Onet code information is optional. Finally, if the individual did not enter employment history during registration, it can optionally be entered here by selecting the Add Employment History link. Any employment history entered in the application will add to the individual’s Background Wizard and system resumes.

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

### **Slide 38**

Entering Employer History

If you selected the “Add Employment History” link (shown on the previous slide), please complete the required fields.

When typing into the **Employer Name** field, the system may populate a drop-down of potential employers. For example, if you begin typing “Target”, a list of possible Target locations will populate as options. If you select the employer from the drop-down, much of the information in the subsequent fields will be filled with the appropriate information.

If you begin to type in an employer and the system does not populate options in the drop-down, you can still enter the employer’s information manually.

Next, type the **Job Title** in the box. Like with the Employer Name, when typing the system may populate a drop-down of potential Job Titles. If you select on the system’s suggested Job Titles, the **Occupation Title** section will auto-fill with associated occupation titles. If no suggested occupation titles appear, use the Search for an occupation link.

### **Slide 39**

Entering Employer History

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

### **Slide 40**

Entering Employer History

Finally, enter the **Job Duties** in the text box.



Once complete, select the “Save” button.

#### **Slide 41**

Added Employment Information

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

#### **Slide 42**

Next is the **Education** tab. This screenshot is what staff will see if completing the application for the Adult program. If completing the application for a Youth, the screen will look different. Refer to the Youth Application Differences slides towards the end of this slide deck for Youth screenshots.

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

If you are serving the target population, disconnected youth, be sure to select “Not attending school or secondary dropout” or “Not attending school; secondary school graduate or has a recognized equivalent” for **School Status**.

#### **Slide 43**

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

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

#### **Slide 44**

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

If you are serving the target population, CaWORKs participants, be sure to select “Yes” for **Temporary Assistance for Needy Families (TANF) recipient**.

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

#### **Slide 45**

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

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

#### **Slide 46**

On the **Barriers** tab, complete the **Individual Barriers** questions. All questions in this section default to “No”, so be sure to answer the questions appropriately. The **Basic Skills Deficient/Low Levels of Literacy** does not default to “No”, so the system will prompt you to answer before continuing.

If a participant qualifies for the AB1111 program based on any of these eligibility criteria, select “Yes” for the appropriate **Individual Barriers** question(s) (ex: English Language Learner, Ex-Offender, etc.).

#### **Slide 47**

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

Note, if the participant qualifies for the AB1111 program based on any these eligibility criteria, select “Yes” for the appropriate **Barriers to Employment** question(s).

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

#### **Slide 48**

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

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

#### **Slide 49**

In the case that low income has not been established, **Family Size** and **Annualized Family Income** are required entries. Enter the appropriate information and use the “i” icon if you need additional information.

Once the Household and Income tab is complete, select the “Next” button to continue.

#### **Slide 50**

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

#### **Slide 51**

After you complete the **Miscellaneous Barriers** section you will complete the section called **Miscellaneous Employment** with a question: “Woman seeking training or education to move into nontraditional field of employment. If you are serving this target population, select “Yes.” On the supplemental tracking sheet that CWDB will provide, you will need to identify the nontraditional field of employment.

The second question “Prison the Employment participant”, asks if the individual is also a P2E participant. If “Yes” is selected, multiple subsequent questions will populate.

Once the Miscellaneous tab is complete, select the “Next” button to continue.

#### **Slide 52**

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

In the **Applicant Eligibility** table, the green highlight(s) represent the Title I program(s) the individual is eligible for based on all of the entries made in the registration and application to this point.

According to the information entered in the system, the individual is not eligible for those programs highlighted in gray/white. For the AB1111 program, the individual does not need to have Title I program eligibility if you are *only* serving them with AB1111. You will still be able to establish eligibility and attach the grant for AB1111 in the section below

(see screenshot on next slide). However, if you are co-enrolling the individual, they will need to be eligible for that particular Title I program.

The “Priority” column provides the barriers/characteristics of the client that may be used to determine if they qualify for priority of service or used to identify target populations. Please note: if you select the “Inactive” box in the “Action” column of this table, you will *NOT* have access to that corresponding program, or funding stream, when adding activity codes for your individual.

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

The **Non-WIOA Grant** section applies to those entities who receive Non-WIOA grant monies or Local Funded Grants. If you are going to be serving this individual with a Non-WIOA Special Grant (i.e. AB1111), select the radio button as “Yes”. is a Non-WIOA Special Grant, so be sure to select “Yes”.

Once you select the “Yes” radio button for the *Non-WIOA Special Grants*, you will see a table populate in the **Grants** section of the page. When this table appears, select the Add link from the Action column for the grant you wish to associate this individual to receive services. In our example, Grant Name 2288 –AB1111. For AB1111, be sure Grant Name 2288 –AB1111 is selected.

Failure to select the AB1111 grant will affect ability to enroll in the program and properly track services.

### **Slide 54**

At the end of the **Eligibility Summary** tab, you can assign yourself as the individual’s case manager by selecting the Assign Me link. Some staff have privileges to assign other staff as the individual’s case manager as well.

In the **Individual Signature** section, if you select the Create PDF box, the system creates a PDF and saves a copy of the form to the user’s documents. If you select the Include Staff Signature, the system will insert the signature on file for you. Finally, you can use the Applicant Signature link if you have an electronic signature pad linked to CalJOBS.

Finally, select the “Finish” button to complete the Title I Application.

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Once you select the “Finish” button on the Eligibility Summary tab, you will receive a Finish Application pop-up message. The message states that the application was successfully saved and asks you where you would like to navigate to next.

If you select **Return to Programs Tab**, you will be routed back to the Programs Tab.

If you select **WIOA # - Participation**, you be routed directly to create Participation. We will review Participation in the next section of the slide deck.

In our example, we are going to select the Return to Programs Tab.

### **Slide 56**

Completed Title I Application

After selecting the **Return to Programs Tab** option, you can scroll down to the Title I Application section to see the completed Title I application. This means that all steps and required fields of the application have been answered. At this point, eligibility for

your program has been established, *however*, this individual is **not** yet enrolled in your program.

If you see something other than “Complete” next to the WIOA #, the application is likely incomplete and needs to be completed before you can continue. Examples of statuses other than “Complete” include:

**Incomplete** = application is missing required data. Will stay this way until the application is completed. When staff go back in to edit the application, they should look for steps that are “grayed out” meaning they are incomplete. The step will turn green once completed.

**Partial** = incomplete application because application is missing required data. Staff selected a check box at the bottom of the first step of the application, which indicated that this is a partial application. This will allow navigation to any page to fill out any information that is available. Eligibility will not be fully determined nor will the application be marked complete until the partial flag is removed and any missing information is provided.

**Case Closed** = Staff created a Closure for the client, but an Exit did not take place yet.

**Case Exited** = The application has exited and client has not received clock-restarting activity for over 90 days. No future services are planned, with the exception of self-service, information only activities, or follow-up services.

**Closed, never enrolled** = No activities are in the application, the application will not be in Performance. This is usually created when an app was created in error.

### **Slide 57**

Also on the Programs tab within your completed Title I application, you can expand the application to show multiple sections, or “ribbons” that are used to enter important participant data.

We will be navigating through most of these ribbons throughout our training.

### **Slide 58**

Creating Participation

### **Slide 59**

What is Participation?

Completing a WIOA Title I Application does **not** automatically enroll an individual into a Title I program.

In order to enroll an individual in a Title I program, including a special grant program, staff **must** create Participation.

Participation is created by entering a Participation date and adding their first activity code.

Once Participation is created, additional activities can be added to the individual’s Title I Application.

### **Slide 60**

Create Participation

This is what your Program Application screen will look like after expanding. Notice a number of light gray “ribbons” that are now present within the application. Select anywhere in the second down, light gray ribbon titled **Participation** (highlighted in yellow) to expand the Participation section. Next, select the Create Participation link.

**Note:** If you do not create Participation for an individual, they will not be enrolled in the program. Creating an application only establishes that they are eligible for the program, but does not enroll.

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At the top of this page there will be **General Information** regarding this individual and the application. In the **Participation Information** section, simply enter the Participation Date in the corresponding field.

This should be the date staff provide the first service to the individual. It cannot be before the Eligibility Date and it cannot be a future date. The rest of the information is auto-filled from the Individual Profile.

Select the “Next” button to continue.

### **Slide 62**

After selecting “Next”, you are now on the Activity Enrollment- General Information page. This is because creating Participation includes creating the first activity code for an individual.

We see several tabs at the top of this page. We begin with the **General Information** tab and ensure that the **Customer Program Group** is the appropriate category. Since this person was eligible to receive services for a Non-WIOA Special Grant (AB1111), 97 – Non-WIOA Special Grant is chosen. If this individual was eligible to receive services from multiple programs, as defined in the Title I application, those options would populate here.

Be sure to select your LWDB Region and the Office location if it is not auto-filled.

### **Slide 63**

Still within the **General Information** tab, we are now under **Enrollment Information**. If you are serving your individual with a special grant, select the grant from the **Grant** dropdown. In our example, our individual is receiving services from a Non-WIOA Special Grant, therefore we selected the 2288 –AB1111 grant code. You **MUST** ensure the correct Grant is selected to properly enroll your participants into your program. For AB1111, be sure 2288 –AB1111 is selected.

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Next, to select an Activity Code, use the link titled “Select Activity Code.” This will generate a pop-up box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the **Activity Code** box. For training purposes today, we chose “101 Orientation.”

Next, your **Actual Begin Date** will auto-populate. Creating Participation is the only instance where your **Actual Begin Date** will auto-populate. When creating subsequent activities, you must manually enter an actual begin date.

Projected end date is when you believe the activity will be completed. Enter a date in the **Projected End Date** box.

### **Slide 65**

Still within the **General Information** tab, we are now under **Staff Information**. If you aren’t already, you can assign yourself as the individual’s case manager in the Current Case Manager field. The last field of the section allows you to add a case note if

desired. We will not add a case note at this time, but will review the process in another slide deck.

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

### **Slide 66**

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

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

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

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

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After selecting “Finish”, you will see information on the **Participation** ribbon within the Title I Application, along with the “Edit Participation” link.

In addition, the **Activities/Enrollments/Services** ribbon now has an activity table with the first service provided to this individual. You can tell this service was provided under the AB1111 program because it is listed in the *Funding/Grant* column on the table.

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Part 2A Summary

- Discussed the WIOA Title I Application
- Demonstrated how to complete the Title I Application for AB1111
- Discussed Participation/Enrollment
- Demonstrated how to create Participation

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Questions

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