

AB1111 CalJOBSSM Participant Training Webinar Series

Part 2A: Title I Application and Participation

EDD Central Office Workforce Services Division
Statewide Training Unit



Welcome back to the AB1111 CalJOBS Participant Training Series. Thank you for joining us, we are happy to share this information with you. Today we will be reviewing Part 2A, completing the WIOA Title I application to establish eligibility for the AB1111 grant and create Participation to officially enroll your participants into your grant.

My name is _____ with EDD's Central Office Workforce Services Division Statewide Training Unit and I have with me _____.

Housekeeping



Sign In – Name and Organization



Adobe Connect 'Questions' Pod



Adobe Connect 'Resources' Pod



PDF Slide Decks

Just a few housekeeping items before we dive in:

[Animation click] As you enter the webinar, please sign in by typing your name and office name in the sign in pod to the left of your screen. If you are joining us as a group, please enter all names.

[Animation click] Throughout this webinar, you may have questions. If so, please type your question into the Q&A pod labeled Questions to the right of your screen. Simply type your question in the dialogue box at the bottom of the pod. We'll answer questions as we go. We may not get to your question, especially if we need to do some research first. The phone lines have been placed in listen-only mode so you will not be able to ask questions over the phone.

[Animation click] In the bottom right hand side of the Adobe Connect window you will find the Resources pod.

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

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

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

Agenda

Day 3 – Thursday, February 27

1:30PM – 4:00

- Tracking Credential Attainment and Measureable Skill Gains
- Closing activities and using the Closure Form
- Program Exit and Follow Ups
- Participant Reports

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
1:00-2:30 PM (Pacific Time)

Registration will be sent out a few weeks before the webinar date.

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

In this module, we will:

- Discuss the WIOA Title I Application
- Demonstrate how to complete the Title I application – This is where we document the participant’s eligibility for the AB1111 program.
- Discuss Participation/Enrollment – Once eligibility is established through the application, we create participation to enroll the individual into the program.
- Demonstrate how to create Participation.

WIOA Title I Application

The Title I application is extremely important in gathering participant information for your AB1111 Grant. For those of you who are not familiar with CalJOBS, let's define the Title I application and how it relates to what your project.

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.

What Data is Collected in the Title I Application?



Fill out the information below to complete this section of the application.

Title I - Workforce Development (WIOA)

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Intro

Contact

Demographic

✓ [Intro](#)

✓ [Veteran](#)

✓ [Public Assistance](#)

✓ [Miscellaneous](#)

✓ [Contact](#)

✓ [Employment](#)

✓ [Barriers](#)

✓ [Eligibility Summary](#)

✓ [Demographic](#)

✓ [Education](#)

✓ [Household and Income](#)

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

CalJOBS Business Rules

30-Day Lock-Down

Application Date

- Cannot be backdated beyond 30 days
- Cannot be greater than today's date

Eligibility Date

- Cannot precede the application date
- Cannot be greater than today's date



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.

CalJOBS Business Rules

Partial save = Not enrolled

Check the box to indicate 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.

- 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.

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.

Please note: A *completed* application DOES NOT enroll the individual into the program.

CaJOBS Business Rules

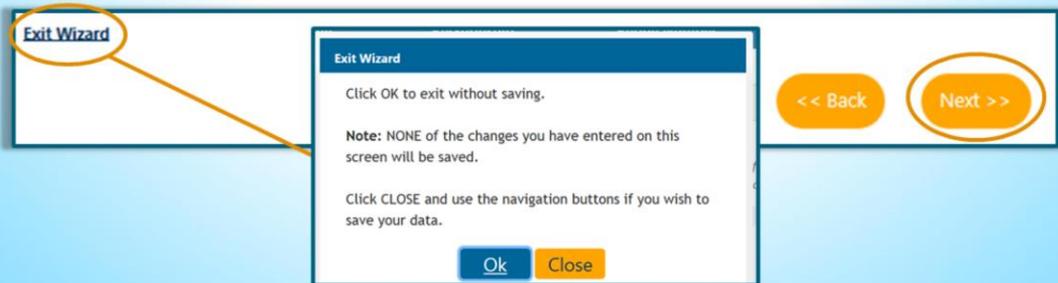
Exit Wizard vs. “Next”

Exit Wizard

Data entry on current screen will not be saved

“Next” Button

Saves application up to current screen



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”.

AB1111 Program Eligibility

- Disconnected youth (18+)
- 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.

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)

To see the complete list, please refer to the AB1111 RFA. This list will also be included in the AB1111 Data Guide.

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.

Assisting an Individual

Menu Home My Dashboard Sign Out Services for Individuals Services for Employers

Quick Search
Enter Search...

My Staff Workspace

- My Staff Dashboard
- My Staff Resources
- My Staff Account
- Directory of Services

Services for Workforce Staff

- Manage Individuals
- Manage Employers
- Manage Resumés
- Manage Job Orders

My Staff Dashboard My Staff Resources My Staff Account Directory of Services

Saved Lists

Individuals Assisted: [Joplin, Janis \(PFARL2017\)](#), [LaTroll, Poppy \(PINKFLOWER\)](#), [Wayne, Bruce \(BRUCE WAYNE89\)](#), [Richmond, Lyndsey \(RICHMONDL16\)](#)

Employers Assisted: [Santa's Toy Shop \(SANTAHELPER\)](#), [CalSTRS \(C8032926\)](#), [CALIFORNIA \(SU1\)](#)

Create an Individual

One Case Note to Multiple Individuals

Assist an Individual

My Calendar

January 2017

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

New Appointments

Upcoming Events

Enter the Appointment Center

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.

The screenshot displays a web application interface with several search-related components:

- Quick Assist:** A section at the top left with a title "Quick Assist" and a link "My Search Lists". It contains two rows of search suggestions, each with a dropdown menu and an "Assist" button. The first row shows "Poppy, Olivia (OLIVIAPOPPY)" and the second row shows "Leaf, November (NOVEMBERLEAVES)".
- General Criteria:** A section below "Quick Assist" with a title "General Criteria". It contains several input fields for search criteria: "Individual Username", "Individual User ID", "State ID Number", "First Name", "Last Name", "SSN (last 4 digits)", and "SSN (full number)". There are also radio buttons for "Starts with these #s" and "Matches exactly".
- Quick Search:** A search box at the top right with the text "wayne.bruce" and a magnifying glass icon. Below it, a dropdown menu shows search results for "WAYNE, BRUCE" with details like Username, User ID, SSN, State ID, and Location.

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.

Results View: **Summary** | [Detailed](#)

To sort on any column, click a column title.

| <u>User Name</u> | <u>First Name</u> | <u>Last Name</u> | <u>SSN</u> | <u>Vet</u> | <u>State ID</u> | <u>Last Login Date</u> | <u>RTW</u> | <u>Last Exited</u> | <u>Created</u> | <u>Action</u> | <u>Select</u> |
|--|-------------------|------------------|------------|------------|-----------------|------------------------|------------|--------------------|----------------|--|--------------------------|
| BRUCE WAYNE89  SBE VETERAN | Bruce | Wayne | 9666 | | 1001008370 | 02/09/2015 | N | | 02/09/2015 | Summary Tab Notes Tab Activities Tab Programs Tab | <input type="checkbox"/> |
| BWAYNE6300 | Bruce | Wayne | 6300 | | 1001474286 | 04/27/2016 | N | | 02/02/2016 | Summary Tab Notes Tab Activities Tab Programs Tab | <input type="checkbox"/> |

[Save New List](#)
[Update Existing List](#)

2 Records found

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.

Please enter any details to validate the Right to Work.

Right to Work Verification

Documentation to Right to Work must be provided to assist this individual. Please complete the following information.

Individual: BRUCE WAYNE

Current Citizenship:

USCIS (Alien Registration) Number:

USCIS (Alien Registration) Expiration Date: [Today](#)

Select one from each column. All documents must be unexpired.

| Documents that Establish Identity | Documents that Establish Employment Authorization |
|---|---|
| <input type="radio"/> U.S. Passport or U.S. Passport Card | <input type="radio"/> U.S. Passport or U.S. Passport Card |

[Save](#) [Cancel](#) [Remind me later](#)

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.

For AB1111, Right to Work Verification is not required and this screen can be bypassed by selecting the Remind me later link. The AB1111 program can assist participants to attain RTW.

Creating a Title I Application

The screenshot displays the 'Creating a Title I Application' interface. On the left, a navigation menu shows 'Staff Profiles' expanded to 'Case Management Profile', with 'Programs' selected. The main content area features tabs for 'Case Summary', 'Programs', 'Plan', and 'Assessments', with 'Programs' highlighted. Below the tabs, there are filter sections: 'Filter Applications' (set to 'All Applications'), 'Filter Activities' (with 'Open', 'Closed', and 'Voiced' checked), and 'Filter Programs' (showing 'Title I - Workforce Development (WIOA)'). A table below lists the program with a purple tab and a link to 'Create Title I - Workforce Development (WIOA) 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.

Title I Wizard keeps track of application progress

Title I - Workforce Development (WIOA) ➔ 1 / 8 

Intro **Contact** **Demographic**

Intro Contact Demographic

Veteran Employment Education

Miscellaneous Eligibility Summary

[▲ Hide All Steps](#)

WIOA [+ Add Program\(s\)](#)

Poppy, Olivia

[Individual Detail](#) [Case Notes](#) [Comments](#) [To Bottom](#)

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.

Title I - Workforce Development (WIOA) 1 / 8

Intro Contact Demographic

Intro Veteran Miscellaneous

Workforce Innovation and Opportunity Act (WIOA)

Application is Closed Never Enrolled

Case Application ID: 2243488

WIA Converted Application ID: Not Applicable

* Application Date: 08/19/2019 Today

Adult Eligibility Date: 08/19/2019 Today

Dislocated Worker Eligibility Date: Today

Youth Eligibility Date: Today

Incumbent Worker Eligibility Date:

The current staff user does not have the required privilege to add or edit the Incumbent Worker Eligibility Date.

Use the Information Icon for help in answering application questions

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. For AB1111, all participants must be entered as Adult including disconnected youth, 18+ year old.

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.

Title I - Workforce Development (WIOA) 1 / 8

Intro Contact Demographic

- Intro
- Veteran
- Miscellaneous

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

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

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

Agency Code: - [Select Agency Code](#)

Create Date: 8/19/2019 4:18 PM

Created By: Bridges, Lyndsey

Edit Date: 8/19/2019 4:18 PM

Last Edited By: Bridges, Lyndsey

Check the box to indicate 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.

[Exit Wizard](#) << Back Next >>

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.

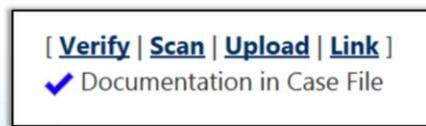
The screenshot displays a registration wizard with three main sections: Contact Information, Residential Address, and Mailing Address. In the top right corner, a progress indicator shows '2 / 11' and a 'Contact' button is highlighted with a blue box. The Residential Address section contains fields for Address 1 (1918 Golden St.), Address 2, Zip/Postal Code (95305), City (Big Oak Flat), State (California), County/Parish (Tuolumne), and Country (United States). The Mailing Address section includes a checkbox labeled 'Check here to use the residential address information', which is circled in orange. Below this checkbox are fields for Mailing Address 1 (1918 Golden St.), Mailing Address 2, Mailing Zip/Postal Code (95305), Mailing City (Big Oak Flat), Mailing State (California), and Mailing Country (United States). The Contact Information section on the left shows fields for First Name (Olivia), Middle Initial, Last Name (Poppy), Social Security Number (654858666), and an SSN Verify link.

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**.

Verify Links

- Allow you to verify documents
- Check your organization's business rules
- System may default to "Documentation in Case File"



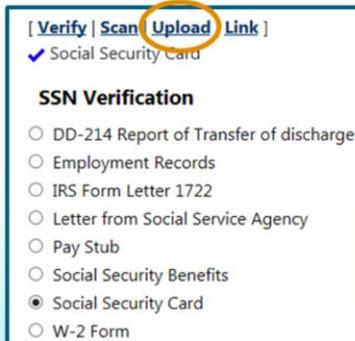
Let's take this time to talk about the Verify links within the application.

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.

Scan/Upload Links

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



[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

✓ Social Security Card

SSN Verification

- DD-214 Report of Transfer of discharge
- Employment Records
- IRS Form Letter 1722
- Letter from Social Service Agency
- Pay Stub
- Social Security Benefits
- Social Security Card
- W-2 Form

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.

Scan/Upload Links

California Workforce Services Network - Add a Document - Internet Explorer
https://trainings2.geosolinc.com/vsp0800000/vosnet/Documents/DocumentAdd.aspx?enc=gVDM55KuLgkPw/WC5h3d2yGusjB43TrSMnbvV5lMjyLl

Please follow the instructions listed below to add a document into the system.

* Indicates required fields. For help click the question mark icon.

Document Association

Program: Title I - Workforce Development (WIOA)
Application: WIOA Application #2242242; Application Date 12/3/2018
Verification Item: WIOA - SSN Verification
Verification Type: Social Security Card

Document Information

* Document Tags: social security card
Keywords that will be indexed with this attachment.
User Accessible: Yes No

Attach Document

Location: U:\SS Card.docx Supported File Format

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.

Scan/Upload Links

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

✓ Social Security Card

📄 [Social Security Card \(application/vnd.openxmlformats-officedocument.wordprocessingml.document\)](#)

SSN Verification

- DD-214 Report of Transfer of discharge
- Employment Records
- IRS Form Letter 1722
- Letter from Social Service Agency
- Pay Stub
- Social Security Benefits
- Social Security Card
- W-2 Form
- Letter/Printout from Social Security Office

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.

Participant Documents

The screenshot displays the 'Participant Documents' interface. At the top, there are tabs for 'Summary' and 'Case Notes'. Below the tabs, a section titled 'Documents Available' contains instructions and a 'Show Filter Options' link. A 'Results View' section shows 'Summary | Detailed'. The main content is a table with the following data:

| Document Name | Document Tags | Category | Modify Date | Action |
|---------------|----------------------|--------------|------------------|---|
| SS_Card.docx | social security card | Verification | 12/03/2018 04:57 | View Delete Edit Download Meta Data |

Below the table, there is a pagination control showing 'Page 1 of 1' and a 'Rows' dropdown set to '100'. A warning message states: 'Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with _ when saving the document in our system.' At the bottom, there are three buttons: 'Add a Document', 'Scan a Document', and 'Link a Document'.

An inset box on the right shows a navigation menu with the following items: Staff Profiles, General Profile, Summary, Case Notes, Activities, Documents (Staff), Case Management Profile, Case Summary, Programs, Plan, Assessments, and Report Profile. An orange arrow points from the 'Documents (Staff)' link in this menu to the 'Documents (Staff)' section in the main interface.

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.

Contact
2 / 11

Phone Information

* Primary Phone Number: Ext.

* Primary Phone Type:

Alternate Phone Number: Ext.

Alternate Phone Type:

Fax:

Email Information

Primary Email:

Alternate Contacts

| Contact Name | Relationship | Phone Number | Date Inactive | Action |
|--|--------------|--------------|---------------|--------|
| There are currently no alternate contacts for this user. | | | | |
| Add New Contact | | | | |

<< Back
Next >>

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.



Demographic Information

| | |
|---|--|
| * Date of Birth: | <input type="text" value="07/24/1990"/> Edit Date Of Birth |
| * Verify: | [Verify Scan Upload Link] |
| Today's Age: | 29 |
| WIOA Eligibility Age (at earliest eligibility): | 29 |
| * Gender: | <input checked="" type="radio"/> Female <input type="radio"/> Male <input type="radio"/> Did not self-identify |
| * U.S. Citizenship Status: | <input type="text" value="Citizen of U.S. or U.S. Territory"/> |
| * Verify: | [Verify Scan Upload Link] |

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

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.

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[Selective Service Website](#)

Registered for the Selective Service: Not Applicable Demographic

Verify: Not Applicable

Selective Service Registration Number:

Selective Service Registration Date:

***Hispanic/Latino Heritage:** Yes No Did not self-identify

***Race (Ethnicity) check all that apply:**

- African American/Black
- American Indian/Alaskan Native
- Asian
- Hawaiian/Other Pacific Islander
- White
- I do not wish to answer.

***Considered to have a disability:** Yes No Did not self-identify

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

If "Yes" is selected for the Considered to have a disability question, additional required fields will populate below.

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.

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Transitioning Service Members

* Transitioning Service Member: Yes No

Please indicate your transitioning type and transitioning service member discharge date.

Transitioning Service Member Type:

Projected Discharge Date: [Today](#)

• Transitioning Service Member Type:

• Projected Discharge Date:

None Selected

Not Applicable

Within 24 Months of Retirement

Within 12 Months of Discharge

Veteran

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.

General Veteran Information

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Please enter the information below regarding the individual's military service.

* Are you the spouse of a member of the armed forces who is on active duty? Yes No

* Eligible Veteran Status (WIOA specific) Yes <= 180 days Yes, Eligible Veteran Yes, Other Eligible Person No

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

* Did you serve more than 1 tour of duty? Yes No

First Military Service Begin Date: Today

First Military Service End Date: Today

Disabled Veteran: No

Homeless Veteran: Yes No

* Enrolled in Homeless Veterans' Reintegration Program: Yes No

Received Services from Veterans Voc. Rehab. (Chapter 31): Yes No Unknown

[Obtain DD214](#)

<< Back Next >>

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 you are serving the target population, veterans, be sure to select “Yes.”

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.

Employment Information

Information entered on this screen is related to the specific individual only.

*** Employment Status:** Not Employed

*** Verify:** [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

*** If Employed, Individual is Under-Employed:** Yes No Not Applicable

In a Registered Apprenticeship Program? Yes No Did Not Disclose

*** UC Eligibility Status:** Neither Claimant nor Exhaustee

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Claimant was referred by: None Selected

Claimant has been exempted from work search: Yes No Unknown

Date Claimant was exempted from work search: Today

*** UC Eligibility Status:** Claimant
Exhaustee

*** Verify:** [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

*** Claimant was referred by:** None Selected

*** Claimant has been exempted from work search:** Yes No Unknown

Date Claimant was exempted from work search: Today

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Employment

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.

Employment
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Number of weeks unemployed:

Must enter value greater than "0" if Not Employed

• Long Term unemployed (27 or more consecutive weeks): Yes No

Please enter the Wage and Onet Code for all applicants with current/previous employment.

Current or Most Recent Hourly Rate of Pay:

Occupational Code of most recent employment: [Find Occupational Code](#)

Individual Employment History

| Company Name | Location | Job Title (Occupation) | Start/End Dates | Action |
|--|----------|------------------------|-----------------|--------|
| No individual employment history records were found. | | | | |
| Add Employment History | | | | |

<< Back
Next >>

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.

Entering Employer History

Employer

* Employer Name:

Address:

Zip Code:

* City:

* State / Province:

* Country:

Job Title

Please enter a job title below for this employment history. As you are entering the job title, you may see a list of common job titles similar to what you are entering. If you see your job title in the list, select it.

* Job title:

Occupation

[\[Search for an occupation \]](#)

* Occupation title:

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.

Entering Employer History

Position

* Type of employment:

* Full or part-time:

Gross Salary:

Salary is based upon:

* Date you began work: (MM/DD/YYYY)

Currently Employed

* Reason for Separation:

Additional information on reason for separation:

(120 characters max)

* Last day worked: (MM/DD/YYYY)

Duration of Job: 0 Year(s) 0 Month(s) 0 Day(s)

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

Added Employment Information

Individual Employment History

| Company Name | Location | Job Title (Occupation) | Start/End Dates | Action |
|--------------|-----------------------------------|---|-------------------------|--|
| Target | 101 S Euclid St Anaheim, CA 92802 | Retail Manager (First-Line Supervisors of Retail Sales Workers) | 07/15/2013 - 08/15/2017 | Edit Delete |

[Add Employment History](#)

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

Education
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Education Information

Information entered on this screen is related to the specific individual only.

* Highest school grade completed:

* High school diploma or equivalent received: Yes No

* Highest education level completed:

* Verify: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

The School Status prompt below may be system-set or selections may be limited based on responses to questions above.

* School Status:

* Verify: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

Next, is the **Education** tab. This screenshot is what staff will see if completing the application for the Adult program (which is what AB1111 is categorized as).

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**.

Education Partner Services

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Education

* Receiving services from Adult Education (WIOA Title II): Yes No Did not self-identify

* Receiving services from YouthBuild: Yes No Did not self-identify

YouthBuild Grant Number (If unknown, enter all 9s.):

Format: AA-99999-99-99-A-99

* Receiving services from Job Corps: Yes No Did not self-identify

* Receiving services from Vocational Education (Carl Perkins): Yes No Did not self-identify

Individualized Education Program Participant: Not Applicable

These Education Partner Services questions default to “Did not self-identify”. Be sure to answer appropriately.

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Next >>

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.

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Public Assistance

Public Assistance Information

Individual or member of a family that is receiving, or in the past 6 months has received, the following:

* Temporary Assistance for Needy Families (TANF) recipient: Yes No

TANF Recipient Type: Applicant Family Member Not Applicable/Unknown

Verify: | [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) |

* Supplemental Security Income (SSI) recipient: Yes No

SSI Recipient Type: Applicant Family Member Not Applicable/Unknown

Verify: | [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) |

* General Assistance (GA) recipient: Yes No

* GA Recipient Type: Applicant Family Member Not Applicable/Unknown

* Verify: | [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) |

* Supplemental Nutrition Assistance Program (SNAP) recipient: Yes No

Verify: | [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) |

Refugee Cash Assistance (RCA) recipient: Yes No

RCA Recipient Type: Applicant Family Member Not Applicable/Unknown

Verify: | [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) |

If answer "Yes" to questions in this section, must select who the recipient is, Applicant or Family Member

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, CalWORKs 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.

Public Assistance

Individual receives, or in the last 6 months, received:

Social Security Disability Insurance (SSDI) recipient: Yes No

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Individual currently meets the following:

* Receiving Services under SNAP Employment and Training Program: Yes No Unknown

* Receiving, or has been notified will receive, Pell Grant: Yes No

* Ticket-to-Work Holder issued by Social Security Administration: Yes No Unknown

<< Back

Next >>

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.

Individual Barriers

Information entered on this screen is related to the specific individual only.

* English Language Learner: Yes No

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

* Basic Skills Deficient/Low Levels of Literacy: Yes No

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Add/View Basic Skills Scores

* Homeless: Yes No

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

* Ex-Offender (individual has been arrested/convicted of a crime): Yes No Did not self-identify

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

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Barriers

On the **Barriers** tab, complete the **Individual Barriers** questions. Most 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.).

Barriers To Employment

Disabled: No

* **Displaced Homemaker:** Yes No

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Long Term unemployed (27 or more consecutive weeks): No

* **Within 2 years of exhausting TANF lifetime eligibility:** Yes No Not Provided

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Older Individual: No

* **Hawaiian Native:** Yes No Not Provided

American Indian/Alaskan Native: No

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Barriers

All Barriers to Employment questions default to "No". Be sure to answer the questions appropriately.

* **Single Parent (including single pregnant women):** Yes No Did not self-identify

* **Cultural Barriers:** Yes No Did not self-identify

* **Is the individual participating in the National Farmworker Jobs Program (WIOA Sec. 167)?** Yes No

* **Meets Governor's special barriers to employment:** Yes No Not Provided

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Next >>

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.

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Household and Income

Income Information i

Due to the individuals disability, they qualify as a Family of 1: Yes No

Low income has already been established based upon previous entries. Family size and income are optional.

Family Size:

Verify: [\[Verify | Scan | Upload | Link \]](#)
✓ Documentation in Case File

Annualized Family Income (last 6 months X2):

Verify: [\[Verify | Scan | Upload | Link \]](#)
✓ Documentation in Case File

[Income Table](#)

If Low Income has already been established based on previous questions in the application, income information is optional

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.

If Low Income has NOT already been established based on previous questions in the application, income information is required.

Income Information

Due to the individuals disability, they qualify as a Family of 1: Yes No

Low income has not been established based on previous entries. Therefore, low income will be based on family size and income. Family size and income are required entries.

• Family Size:

• Verify: [\[Verify | Scan | Upload | Link \]](#)
✓ Documentation in Case File

• Annualized Family Income (last 6 months X2):

• Verify: [\[Verify | Scan | Upload | Link \]](#)
✓ Documentation in Case File

[Income Table](#)

<< Back **Next >>**

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.

Miscellaneous Barriers

• **Gang Status:**

• **Youth of Incarcerated Parent:** Yes No

Parole Number:

• **Substance Abuse:** Yes No

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



Miscellaneous Employment

- Woman seeking training or education to move into nontraditional field of employment: Yes No
- Prison to Employment participant: Yes No

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Next >>

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.

Applicant Eligibility

Applicant meets the definition for low income: Yes

Income Table: [Income Table](#)

Youth applicant meets low income based upon living in a high poverty area or free/reduced school lunch: no

| Program | Eligible | Priority | Calculated Exception/Limitation | Reason(s) Not Eligible | Action |
|-------------------|--------------------|----------|---------------------------------|-------------------------|-----------------------------------|
| Adult | Yes | PA, LI | | | <input type="checkbox"/> Inactive |
| Dislocated Worker | Undetermined | | | No DW Eligibility Date. | <input type="checkbox"/> Inactive |
| Youth | Yes, Out-of-school | | | | <input type="checkbox"/> Inactive |

VET = Veteran, BSD = Basic Skills Deficient, PA = Public Assistance, LI = Low Income, SLP = Additional Priorities

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Eligibility Summary

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.

Eligibility Summary

Applicant Eligibility

Applicant meets the definition for low income: Yes

Income Table: [Income Table](#)

| Program | Eligible | Priority | Calculated Exception/Limitation | Reason(s) Not Eligible | Action |
|-------------------|--------------|----------|---------------------------------|---|-----------------------------------|
| Adult | No | | | Selective Service is not met. Not Authorized To Work In US | <input type="checkbox"/> Inactive |
| Dislocated Worker | Undetermined | | | No DW Eligibility Date. | <input type="checkbox"/> Inactive |
| Youth | Undetermined | | | No Youth Eligibility Date. | <input type="checkbox"/> Inactive |

VET = Veteran, BSD = Basic Skills Deficient, PA = Public Assistance, LI = Low Income, SLP = Additional Priorities

In this example, the individual is not eligible for any Title I programs, with the *Reason(s) Not Eligible* listed on the table. However, the individual can still be eligible for the AB1111 program.

To establish eligibility for AB1111, scroll to the **Non-WIOA Grants** section of the page.

WIOA Grant Eligibility

Changes in this section will create immediate updates to the record.

Incumbent Worker Eligibility: Yes No Not Applicable Inactive

Applicant does not meet the requirements for Incumbent Worker eligibility.

National Dislocated Worker Grant NDWG: Yes No Not Applicable Inactive

Applicant does not meet the requirements for National Dislocated Worker Grant NDWG.

Statewide Adult Eligibility: Yes No Not Applicable Inactive

Applicant does not meet the requirements for Statewide Adult Eligibility.

Statewide Dislocated Worker Eligibility: Yes No Not Applicable Inactive

Applicant does not meet the requirements for Statewide Dislocated Worker Eligibility.

You must select "Yes" for Eligibility for AB1111

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Eligibility Summary

Non-WIOA Grants

Non-WIOA Special Grants: Yes No Not Applicable Inactive

Local Funded Grants: Yes No Not Applicable Inactive

Grants

No grants have been added.

Select from the list of available grants.

| Grant Type | Grant ID | Grant Name | Local Grant Code | Date Added | Action |
|-----------------------|----------|---------------|------------------|------------|--|
| NonWIOA Special Grant | 414 | 2288 - AB1111 | 2288 | | Add |

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.) AB1111 is not categorized as a WIOA grant, so keep all questions as "Not Applicable".

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, select the radio button as "Yes". AB1111 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.

Eligibility Summary 11 / 11

Current Case Manager: Case currently Not Assigned to a Case Manager
[Assign Case Manager](#)
[Assign Me](#)
[Remove Case Manager Assignment](#)

Previous Case Manager:

Individual Signature

Create PDF
 Include Staff Signature

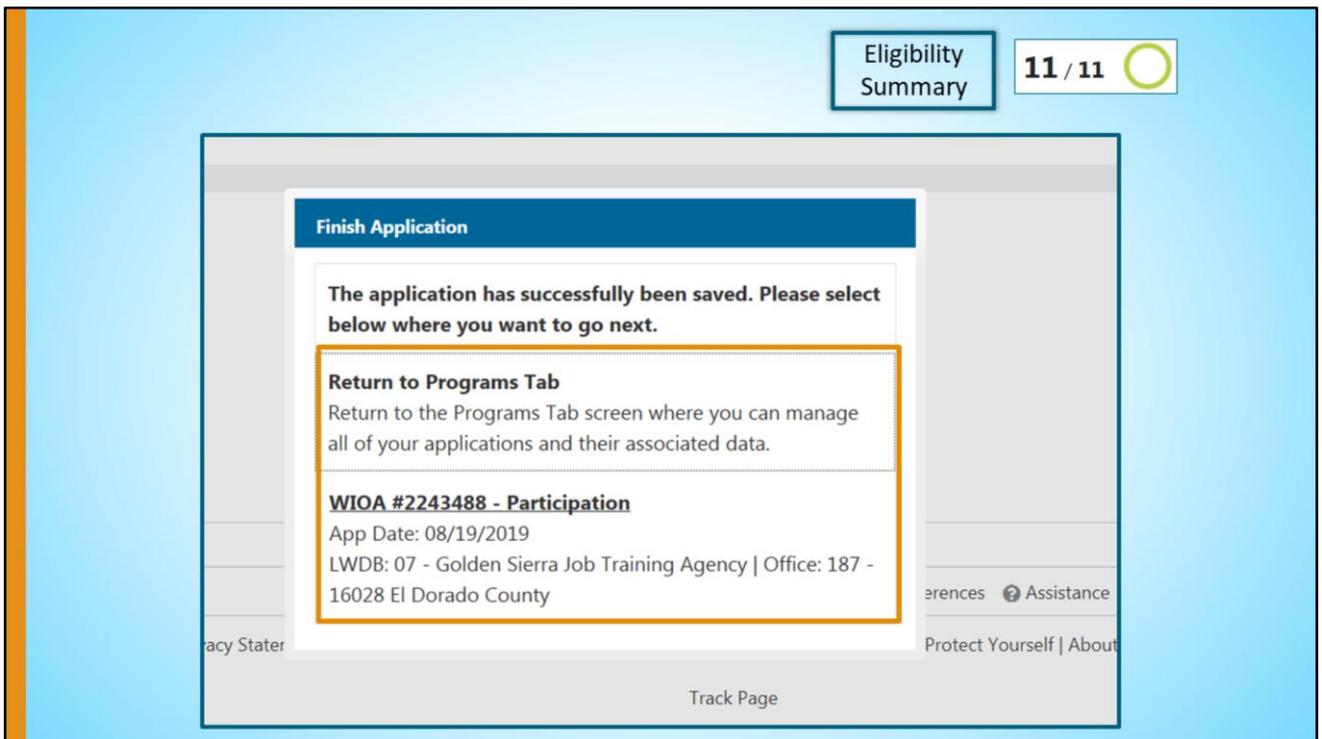
[Applicant Signature](#)

[Exit Wizard](#) << Back Finish Print

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.



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

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

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

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

Completed Title I Application

Case Summary **Programs** Plan Assessments

Show Summary Tabs Poppy, Olivia

Title I - Workforce Development (WIOA) Apps: 1

[Create Title I - Workforce Development \(WIOA\) Application](#)

[Convert WIOA Pre-Application](#)

[WIOA #2243488 - Complete](#) Click the WIOA link to see the app in view only

Pencil icon to edit the application Verification Summary

| | | | | |
|--|------------------------|---|---------------------|-------------------|
| | LWDB: | 07 - Golden Sierra Job Training Agency | Application Date: | 08/19/2019 |
| | Onestop: | 187 - 16028 El Dorado County | Participation Date: | N/A |
| | Open/Total Activities: | 0 / 0 | Closure Date: | N/A |
| | | | Exit Date: | N/A |

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.

When the application is expanded, multiple sections, or ribbons, populate below. These ribbons are used to enter important participant data, like activity codes, credentials, follow-up information, etc.

| | | |
|---|--|-----|
| + | Eligibility Summary | |
| + | Participation | N/A |
| + | Activities / Enrollments / Services | 0 |
| + | Measurable Skills Gain | 0 |
| + | Educational Functioning Level for Measurable Skills Gain | 0 |
| + | Credentials | 0 |
| + | Youth Goals | 0 |
| + | Partner Programs | 0 |
| + | Closure | N/A |
| + | Exit / Outcome | N/A |
| + | Follow-ups | 0 |

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.

Creating Participation

At this point, you should have a completed Title I application. This means that all steps and required fields of the application have been answered. In completing the application, eligibility for your program has been established, *however*, this individual is **not** yet enrolled in your program.

To enroll the individual into your program, you must first create Participation.

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.

WIOA #2243277 - Complete

| | | | |
|------------------------|---|---------------------|-------------------|
| LWDB: | 07 - Golden Sierra Job Training Agency | Application Date: | 06/24/2019 |
| Onestop: | 187 - 16028 El Dorado County | Participation Date: | N/A |
| Open/Total Activities: | 0 / 0 | Closure Date: | N/A |
| | | Exit Date: | N/A |

Case Information

| | |
|---|------------------------------------|
| ABC Eligibility Date: N/A | Adult Eligibility Date: 06/24/2019 |
| Dislocated Worker Eligibility Date: N/A | Youth Eligibility Date: N/A |
| Incumbent Worker Eligibility Date: N/A | |

Location and Staff

| | |
|--|--|
| LWDB: 07 - Golden Sierra Job Training Agency | Onestop: 187 - 16028 El Dorado County |
| Create Staff: Steven Blevins (33633) | Edit Staff: Steven Blevins (33633) |
| Case Manager: N/A | Temporary Case Manager: N/A |

Eligibility Summary

| | |
|----------------------|-----|
| Participation | N/A |
|----------------------|-----|

[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.

| General Information | |
|---------------------------|--|
| State ID: | 31650 |
| Name: | Luke Cage |
| Date of Birth: | 06/01/1972 |
| Application Date: | 06/24/2019 |
| Eligibility Date: | 06/24/2019 |
| Participation Information | |
| * Participation Date: | <input type="text"/> (mm/dd/yyyy)  Today  |
| Participation Age: | 47 |

Create Participation

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.

| General Information | Service Provider |
|----------------------------|---|
| 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: 6/24/2019 Earliest Eligibility Date: 06/24/2019 |
| Participation Date: | 06/24/2019 |
| * Customer Program Group: | 97 - Non-WIOA Special Grant |
| * LWDB: | Golden Sierra Job Training Agency |
| * Office Location: | None Selected |

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.

General Information

Service Provider

Create Participation

Enrollment Information

Grant: 2288 - AB1111 ▼

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

*** Activity Code:**
[\[Select Activity Code \]](#)

Projected Begin Date: [Today](#)

Actual Begin Date:
Actual begin date may not be modified on the first activity.

*** Projected End Date:** [Today](#)

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 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.

General Information | **Service Provider**

Create Participation

Enrollment Information

Grant: 2288 - AB1111

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

*** Activity Code:** [\[Select Activity Code.\]](#)

Projected Begin Date: Today

Actual Begin Date: 06/24/2019
Actual begin date may not be modified on the first activity.

*** Projected End Date:** Today

Any classes attended through Distance Learning: Yes No

Participant has been issued an ITA and the ITA will pay for this service: None Selected

| Activity Code | Activity Title | Provider Type |
|---------------|---|----------------------|
| 101 | Orientation | PS - Office Services |
| 102 | Initial Assessment | PS - Office Services |
| 103 | Provision of Information on Training Providers/Performance Outcomes | PS - Office Services |
| 105 | Job Finding Club | PS - Office Services |
| 106 | Follow-up Services after Employment (prior to Exit) | PS - Office Services |
| 107 | Provision of Labor Market Research | PS - Office Services |
| 108 | Referred to WIOA Services (not training) | PS - Office Services |

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.

General Information | Service Provider

Staff Information

Staff ID: 31890

* 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 | |
|----|-------------|---------|----------------------|
| | | | Edit |

Create Participation

[Next >>](#)

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.

Create Participation

Budget Planning

Closure Information

Closure Information

Enrollment Summary: Enrollment ID: 2812295
 Username: Cage, Luke
 WIOA Application ID: 2243488
 Activity Code: 101 - Orientation
 Activity Dates: 06/24/2019 06/24/2019

Last Activity Date: Today

Completion Code:

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

| ID | Create Date | Subject | Action |
|----------------|-------------|---------|--------|
| No data found. | | | |

<< Back
Finish
Delete

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.

☰ Participation 06/24/2019

[Edit Participation](#)

Participation Date: 06/24/2019

☰ 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 2288 - AB1111 | N/A | 06/24/2019 | 06/24/2019 | Close |

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.

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

In this module, we:

- Discussed the WIOA Title I Application
- Demonstrated how to complete the Title I application – This is where we document the participant’s eligibility for the AB1111 program.
- Discussed Participation/Enrollment – Once eligibility is established through the application, we create participation to enroll the individual into the program.
- Demonstrated how to create Participation.

Questions



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