Title Slide
AB1111 CalJOBS℠ Participant Training Webinar Series
Part 3: Credentials and MSG, Closure and Exit, Follow Up, and Reports

Slide 2
Housekeeping
Just a few housekeeping items before we dive in:

- As you enter the webinar, please sign in by typing your name and office name in the sign in pod to the left of your screen. If you are joining us as a group, please enter all names.
- Throughout this webinar, you may have questions. If so, please type your question into the Q&A pod labeled Questions to the right of your screen. Simply type your question in the dialogue box at the bottom of the pod. We'll answer questions as we go. We may not get to your question, especially if we need to do some research first. The phone lines have been placed in listen-only mode so you will not be able to ask questions over the phone.
- In the bottom right hand side of the Adobe Connect window you will find the Resources pod.
- Also in the resources pod you will find the PDF slide deck for today's training session. We will also post this and the rest of the slide decks on CalJOBS.

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

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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

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Day 3 Objectives

- Demonstrate how to record Measureable Skill Gains (MSG) and Credential Attainment
- Distinguish Closure, Exit, and Outcome
- Complete Closure Form
- Enter Follow-Up Activities and Follow-Up Forms
- Review Participant Reports

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Measurable Skill Gains (MSG) and Credential Attainment

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What is a Measurable Skill Gain (MSG)?

- A performance indicator required of those WIOA participants enrolled in education or training programs.
- Documents academic, technical, occupational, or other forms of progress toward a credential or employment.
- Participants must achieve one (1) MSG for every program year they are enrolled in education or training.
- There are five (5) different types of MSG.

WIOA mandates that programs that enroll individuals in education or training programs document that they are achieving academic, technical, occupational, or other forms of progress toward a credential or employment.

Participants must achieve one (1) MSG for every program year they are enrolled in education or training. There are five (5) types of MSG; staff record the type of MSG appropriate for the type of education or training program the participant is enrolled in.

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The five (5) types of MSG include:

1. Educational Functioning Level (EFL) – This MSG would be appropriate for participants, especially youth participants, who are designated as English language learners or who are basic skills deficient, and who gain at least one EFL as established by a pre-test and post-test.
2. Secondary School Diploma - This MSG would be appropriate for participants, especially youth participants, who do not have a secondary school diploma or its equivalent at program entry.
3. Transcript/Report Card – This MSG would be appropriate for participants who are enrolled in an education program such as high school or community college.
4. Training Milestone – This MSG is used for those participants who are enrolled in on-the-job training (OJT), registered apprenticeship, or work experience. (Note: Youth participants enrolled in OJT or Work Experience are not included in the MSG performance indicator.

5. Skills Progression – This MSG is used for those participants who are enrolled in an occupational skills training program.

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Entering a MSG

Let's review how to enter Measureable Skill Gains or MSG.

You will enter MSG information in the **Measurable Skills Gain** ribbon. To create a MSG, expand the gray ribbon called **Measurable Skills Gain.** Then click the <u>Create Measurable Skills Gain</u> link.

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Under the **General Information** section, choose your LWIA/Region, then choose your organization from the **Office Location** drop down menu.

In the **Skill Attainment Information** section, select the appropriate MSG option from the **Skill Type** drop-down menu. The four options include: Post-Secondary Transcript/Report Card, Secondary Transcript/Report Card, Training Milestone, Skills Progression. Be sure to select the appropriate skill type for the kind of education or training program your individual is enrolled in.

Next, enter the **Date Skill Attained** field. Under Type of Achievement, you will select the appropriate type of achievement for the individual. Finally, select the <u>Verify</u> link to indicate what kind of documentation was used to verify the MSG. You may then upload documentation in CalJOBS if that is your organization's method of retaining records.

To finish, select the **Save** button.

Note: You can record the Secondary School Diploma type of MSG using the Credential ribbon. Simply follow the same instructions as you would for entering any other type of Credential.

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Educational Functioning Level (EFL)

The Educational Functioning Level (EFL) type of MSG is recorded in the **Educational Functioning Level for Measurable Skills Gain** ribbon. To record an EFL type of gain, expand the ribbon then click the <u>Create Educational Functioning Level Record</u> link.

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Next, enter the requisite information in the Assessment Information section, including the **Test Type** (this will auto-populate as Pre-Test when entering the initial assessment information), the **Assessment Category** (either ABE or ESL), and **Type of Assessment** (select the option that applies to the assessment tool your program uses from the drop-down menu). Then enter the **Functional Area** (Reading, Writing, Language, Mathematics, etc.).

In the **Pre-Test** section, provide the **Date of Pre-Test** and the **Pre-Test Score**. Once you've entered the score, the **Educational Functioning Level** will auto-populate with the EFL associated with that score.

Then click on **Save** to save the Pre-Test information. You will then return to the individual's Program tab.

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EFL – Post Test

Now that we have entered the individual's Pre-Test scores, we can then go back into the **EFL for MSG** ribbon to enter their Progress/Post-Test information.
To do so, select the appropriate assessment record from the **Funct Area – Assess Category** column on the **EFL** table. In this example, we will select <u>Reading</u>. This will take you back into the assessment record.

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EFL – Post Test
Once you have opened the individual's assessment record, scroll down to the bottom of the page where you will find a **Progress/Post Assessments**. This section only populates after you enter Pre-Test scores. To create a Progress or Post-Test assessment record, select the <u>Create Progress/Post Assessment Record</u> link.

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Again, scroll down to the **Progress/Post Assessment** section of the form. Select Post-Test from the **Test Type** drop-down menu. Then enter the **Progress Test Score**. As before, the Educational Functioning Level will auto-populate with the EFL associated with that score.
Finally, select **Save** to save the post-assessment and return to the individual's Programs tab.
If your individual is eligible to receive an EFL gain type of MSG – and they have increased their EFL by at least one level – they will receive a EFL gain type of MSG.

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EFL Gain
After you complete the Post-Test record, you will be redirected to back to the Programs tab. You will now see the Post-Test EFL populate in the EFL table. If the Post-Test score increases the EFL by at least one level, this will count as a positive result for an EFL type of MSG.

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What is Credential Attainment?

- A performance indicator required for those WIOA participants enrolled in education or training programs.
- Participants are expected to attain the appropriate type of credential for the education or training program they are enrolled in.
- Participants have up to one year *after* program exit to receive their credential.

WIOA mandates that programs that enroll individuals in education or training programs are expected to document that participants attain the appropriate type of credential for the training program they are enrolled in. Participants have up to one year after program exit to receive their credential. AB1111 projects should collect credential attainment outcomes for their participants.

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Creating a Credential
You will enter credential attainment information in the **Credentials** ribbon. To create a credential, expand the gray ribbon called **Credentials.**
Click the "<u>Create Credentials</u>" link.

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Under the **General Information** section, choose your LWIA/Region, then choose your organization from the **Office Location** drop down menu.
In the **Credential Information** section, select the appropriate credential attainment option from the **Credential Received** drop-down menu. The **Credential Verification** field is available for use if you would like verify the credential and upload documentation in CalJOBS. If the Verify link is not utilized, the statement "Copy containing in Case File" will result.
Next, complete the **Date Credential Received** field. Finally, although not marked with a red asterisk, it is required that you select the Search Activities link from the **Associated to Activity** field to associate an activity to this credential attainment. Click the Select link from the "Action" column for the appropriate activity code, and the information will populate into the **Associated to Activity** field.
To finish, select the "Save" button.

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Result of Creating a Credential

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Closing Activities
Closing your activities once complete is important for data tracking purposes.

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Closing an Activity
To indicate that you have completed providing a service to an individual, you will close that particular activity. To close an activity, expand the **Activities/Enrollments/Services** ribbon. This will bring you to your activity table. Select the "Close" link in the far right column for the activity you wish to close.

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Select the **Last Activity Date**.
Select **Completion Code** from the dropdown menu. Your options for completion are shown in this slide.
Select the "Finish" button.

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Closed Activities
As a result, you will now see a closed Status. You will also see an end date and the completion result in the **Actual End Date** column.

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Program Closure, Exit, and Outcome
As your individuals are nearing the end of participation in your program, it is important to understand closure, exit, and outcomes.

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Program Exit
Program exit is an important concept for staff to understand. We will define exit and the exit clock.

<u>Exit</u> is the **last date of service** for **all DOL programs** and there are no future clock restarting services scheduled. The date of exit, however, is not known until 90 days have lapsed in which no additional services are provided.

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The Exit Clock
The Exit Clock refers to the 90 days in which an individual is not receiving any services. The Exit clock works like this:

- Starting from the last date in which a service is provided, if no further services are provided for 90 days, the individual is exited from the system.
- The exit is initiated automatically by CalJOBS as soon as the 90 day Exit Clock has lapsed.
- The exit date is the last date of service NOT the last day of the Exit Clock.

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Program Exit and the Exit Clock
"Staff-Assisted Services" means the kinds of services and activities that require significant staff involvement--things that job seekers can't do on their own. This excludes Self-Service or Information-Only services. These are resources that individuals can access on their own.
For example, if a job seeker creates an account in CalJOBS, or if a job seeker asks an AJCC staff member for general assistance in a computer lab, these are considered Self-Service and Information-Only Service. The job seeker didn't require much help from staff. These services will not restart the Exit Clock.
Likewise, Follow-Up Service and Supportive Services do not restart the Exit Clock. So, if a staff member plans on following up with an individual who got a job, this Follow-Up Service will not change the exit date.

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How do we know if an activity restarts the exit clock?
To learn if an activity code restarts the exit clock, refer to your Activity Codes listing found in the WSD19-06.
Within attachment 3, there is a column titled "Exit Clock?" that indicates whether or not an activity restarts the exit clock. If the value is "Yes" and that service code is added to an individual's program application in CalJOBS, the 90 day exit clock will be reset.

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Closure Form

- Case Management tool that captures outcome data
- Is manually created by staff or system-created
- Can be entered once all open activity codes are closed
- Not required for a participant to exit
- Not the same as an Outcome (Exit or Exclusionary)

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Creating Case Closure
With the Title I Application expanded, click anywhere in the gray ribbon called **Closure** to expand it.
Click the "<u>Create Closure</u>" link.

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After selecting the "Create Closure" link, under **General Information** enter your **Office Location** if it is not prepopulated. You can also enter an **Agency Code** if your organization uses them.
Choose the **Accountability Closure/Exit Status** by selecting the drop-down arrow. Options are shown on this slide. You will most likely choose option 3 – "Neither condition applies."

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Scrolling down, under **Outcome Information**, select the appropriate **School Status at Exit** from the dropdown menu. Our example shows "Not attending school, H.S. Graduate." *Note: if your individual is an Adult participant, you will not receive the last option in the School Status at Exit drop-down.
If your individual is a Youth, you may have a **Youth Placement at Exit** field. If so, select the appropriate option from the dropdown.

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Finally, choose whether or not the individual entered employment in the **Employment Information** section.
If "Yes" is chosen, the employer information must be completed in the system by selecting the "Add Employer" link.
"Yes, Recall Employer" can be selected if the individual returns to work for a previous employer, and that employer has been captured in CalJOBS.
If "No" is chosen, complete the **Staff Information** if applicable. Select the "Save" button to generate a case closure. The case closure date will now appear within the **Closure** ribbon of the Title I Application.

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Entering Employer Information
If you selected the "Add Employer" 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 (address, NAICS Code, and contact number) will be entered with the appropriate information. You must ensure all required fields are complete before moving to the next section.
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.

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Entering Employer Information
Continuing with the **Add/Edit Employer** section, enter all required **Job Information** fields.

Slide 38
Entering Employer Information
Continuing with the **Add/Edit Employer** section, enter all required **Job Information** fields.

Once complete, select the “Save” button.

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Added Employment Information
This table will populate in the case closure screen as a result of entering the employment information.

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Program Outcome
Now let’s talk two types of Program Outcomes: Exit and Exclusionary Outcome.
As we’ve already discussed, an Exit occurs when an individual has not received a staff-assisted service for 90 days in any WIOA program and has no services scheduled. The Exit is system generated and the Exit date is the last day in which a service was provided. It is also called a “soft exit” or “common exit,” common because the Exit applies to any DOL administered program in which the individual is enrolled.
Exclusionary Outcome
Other exit reason: incarceration, hospitalization, medical treatment, reservist called to active duty, in foster care moved out of area by the foster care system, death.
Manually entered by staff.

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Exit
How does this work in CalJOBS?
If a soft exit has occurred, a date will be listed in the **Exit Date** field of the application area and in the **Exit/Outcome** ribbon. The **Exit Reason** will be listed as “Soft Exit”.

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Exclusionary Outcome
How does this work in CalJOBS?
To create an exclusionary outcome, expand the application (note there is no Exit Date yet), navigate to and expand the **Exit/Outcome** ribbon, and select the Create Exit/Outcome link.

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Enter staff information in the General Information section. Then, enter the **Exit Date** and choose the **Exit Reason** from the drop-down.
Once complete, select the “Save” button at the bottom of the page. Once saved, an Exit Date will now appear, with the Exit Reason listed as the exclusionary reason you chose.

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Example of Case Exited

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Follow-Up Activities and Follow-Up Forms
After a closure is created or when an individual exits the program, follow-up activities populate as options when adding an activity code.

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Follow-Up: Activities

- Follow-Up services do not delay, postpone, or affect the date of exit

- Services can only be provided to participants who have a case closure or have exited from the Title I program
- Services can be provided as soon as a closure and/or exit is created
- Select the Create Activity/ Enrollment/ Service link to add services

Follow–up activities can be created after exit or after creating closure, by selecting the “Create Activity/ Enrollment/Service” link from the Activities/Enrollments/Services ribbon. Follow-up codes are used for documentation of the services you provide after closure or exit.
Note: Follow-up supportive services can only be provided to Youth.

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Follow-Up Activities
This is a list of possible follow-up codes you can enter into CalJOBS. These are known as F-codes because the activity codes to choose from all begin with the letter “F.”

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Follow-Up Activities – F Codes
The F-Code will populate in the Activity table as a Follow-up service. To close the activity, follow the same steps as closing out a regular activity.

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Follow-Up: Forms
- System-generated after Exit – shows for 4 quarters
- Follow-up tables appears one quarter after exit
- Forms can be prepopulated with data from Closure Form, if applicable

Follow-up is intended to support the participant in retaining employment and continuing to improve their employment success after exit.
In CalJOBS, the system generates a follow-up table with follow-up forms for 4 quarters after exit. This table does not populate until after the 90thday after exit. If the closure tab was utilized, data from that tab my pull over into the follow-up forms.

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Follow-Up Forms
Within the Title I program application, there is a ribbon titled “Follow-ups”. This section is for entering follow up information, including employment information.
To enter follow-up information, select the link in the “Follow Up Type” column for the quarter you would like to enter follow-up information.

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The first section, General Information, populates with system information. **Alternate Contact Information** and **Contact Attempts** can be recorded in the corresponding sections, if desired.
If employment information was not entered into the closure tab, because the individual was not working at the time of the closure or if staff did not complete the closure tab, you will see a message in the **Employer Name** section, “No Employment information”.
If you answer “Yes” to the **Worked in Quarter?** Question, employment information needs to be entered by using the Add Employer link. The employer entry screen is the same screen as the one in the closure tab.

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In the **Follow-Up Employment Information** section, if you had previously entered employment information in the closure tab, that information would populate in the **Employer Name** field. If the individual was still working for that employer in the quarter defined in the **Worked in Quarter?** question, there is no need to add employer information.

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The next section in the Follow-Up form is the **Post-Exit Placement Information**. Select placement information for that quarter and date of placement, if applicable. This information is particularly important for youth placement information.

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Finally, in the **Current Status at Follow-up** section enter the **Actual Date of Follow-Up** and **Contact Type**.

The information in the ***Follow-up Status*** section is only required when no employment, no youth placement, and no youth diploma/credential is recorded.

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Follow-Up Forms

The completed follow-up will now appear within the table on the **Follow-ups** ribbon, noted by the date it was complete. To edit the follow-up, select the corresponding link in the "Follow Up Type" column.

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Participant Reports

We are going to review a couple participant reports that pertain to what we have talked about today: Credentials and a Closure Form Report.

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Participant Reports

- Credentials
- Case Closure Reportable Performance Indicator

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Credentials Report

This report displays credential attainment information entered into an individual's credentials ribbon within their program application.

The Credentials report displays information entered into an individual's credentials ribbon within their program application, if any. This report is useful in gathering credential attainment information for a group of individuals (i.e., enrolled in a special grant).

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Case Management Reports > Case Load

Credentials

To run this report, from the Reports left hand menu, select Detailed Reports. On the next page, scroll to the Case Management Reports section and select Case Load. Next, select Credentials.

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Report Filters

In this slide, we will look for credential information for participants enrolled in a special grant project.

1. In the first filter area, **Program**, select “Title I- Workforce Development (WIOA)” in the **Program Type** field. You can leave the **Customer Group** field as “None Selected”.
2. Next, in the **Location** section, select the appropriate **Region** and **Office** Location.
3. In the **Grant** section, select your grant in the **Available Grants** field. To find your grant faster, you can use the **Grant Type** filter to narrow the results. For AB1111 use NonWIOA Special Grant.
4. Finally select *Credential Date* from the **Filter By Date** filter and enter the appropriate **Date Range**. Select “Run Report.”

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Results

What results is your list of credentials documented to individuals enrolled in this program.

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Case Closure Reportable Performance Indicator

Case Closure Reportable Performance Indicators – This report lists individuals in a federal program by reportable performance indicators. The report shows performance indicator information for any credentials that may have been received, school status and diploma, and employment placement information. Much of this data is derived from the Case Closure form in the individuals’ profiles.

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Case Management Reports > Case Load

Case Closure Reportable Performance Indicators

To run this report, from the Reports left hand menu, select Detailed Reports. On the next page, scroll to the Case Management Reports section and select Case Load. Next, select Case Closure Reportable Performance Indicators.

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Report Filters

1. In the **Report Type** area, select “Both- Displays all closure types” in the **Report Type** drop-down.
2. In the **Program** area, select “WIOA Program” in the **Program** drop down. To view the report on Adult/DW/Youth participants, choose the group in the Customer Group box. For AB1111, we can leave this as “None Selected.”
3. In the **Location** area, go to **Region/LWDB** and **Office Location** and make appropriate selections. If you are running the report for a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
4. Finally in the **Date** area, select “Actual Closure Date” in the **Filter by Date** field. Then, select your appropriate dates in the **Date Range** field.

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Results

Here is your list of Case Closures Reportable Performance Indicators to those enrolled in that program. The columns were very wide, so the results are split into two images.

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Day 3 Summary

- Demonstrated how to record Measureable Skill Gains (MSG) and Credential Attainment
- Distinguished Closure, Exit, and Outcome
- Completed Closure Form
- Entered Follow-Up Activities and Follow-Up Forms
- Reviewed Participant Reports

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Questions?

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