

AB1111 CalJOBSSM Participant Training Webinar Series

Part 3: Credentials and MSG, Closure and Exit, Follow Up, and Reports

EDD Central Office Workforce Services Division
Statewide Training Unit



Welcome to the AB1111 CalJOBS Participant Training Series. Thank you for joining us, we are happy to share this information with you. Today we are wrapping up the series and will be reviewing Part 3, entering measureable skill gains and credentials, closing activities, discussing the difference between Closure and Exit, and finishing up the series with follow up and reports.

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

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

In this training, we will:

- 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

Measureable Skill Gains (MSG) and Credential Attainment

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.

Five Types of MSG



Educational Functioning Level



Secondary School Diploma



Transcript/Report Card



Training Milestone



Skills Progression

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 a 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.

Entering a MSG

The screenshot displays a software interface with a light blue background. At the top, the title 'Entering a MSG' is shown. Below it, a gray ribbon contains the text 'WIOA #2243147 - Complete' and three icons: a pencil, a printer, and a checkmark. A table below the ribbon lists activity details:

LWDB:	20 - Mother Lode Job Training	Application Date:	05/12/2019
Onestop:	714 - MLC Mother Lode Job Training - Tuolumne	Participation Date:	05/13/2019
Open/Total Activities:	0 / 1	Closure Date:	N/A
		Exit Date:	N/A

An orange arrow points from the 'Open/Total Activities' row to a second gray ribbon below. This ribbon is titled 'Measurable Skills Gain' and shows a count of '0'. It contains a blue link 'Create Measurable Skills Gain' with an orange arrow pointing to it. Below the link is the text: 'Please enter EFL gains in the Educational Functioning Level for Measureable Skills Gain screen.' At the bottom of the ribbon, it says 'There are no records to display.'

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 Create Measurable Skills Gain link.

Skill Attainment Information

Fill in the following information for the skill achievement. **Program:** Title I - Workforce Development (WIOA)

* **Skill Type:** Training Milestone

* **Date Skill Attained:** Today

* **Type of Achievement:** Completed 1 year of Registered Apprenticeship program

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

None Selected

- Completed minimum of 12 credit hours in semester and meets academic standards
- Part-time student and completed at least 12 credit hours over the course of two completed consecutive semesters and meets academic standards
- Report card/transcript for one semester and meets academic standards
- Achieved satisfactory or better progress report towards an established OJT training milestone - not previously recorded
- Completed 1 year of Registered Apprenticeship program and achieved satisfactory or better progress report
- Other training milestone
- Successfully completed a required exam for a particular occupation
- Satisfactory progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams
- Other skills progression achievement

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 Verify 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.

Educational Functioning Level (EFL)

WIOA #2243147 - Complete



LWDB:	20 - Mother Lode Job Training	Application Date:	05/12/2019
Onestop:	714 - MLC Mother Lode Job Training - Tuolumne	Participation Date:	05/13/2019
Open/Total Activities:	0 / 1	Closure Date:	N/A
		Exit Date:	N/A



[-] Educational Functioning Level for Measurable Skills Gain 0

[Create Educational Functioning Level Record](#)



There are no records to display.

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 [Create Educational Functioning Level Record](#) link.

The screenshot shows a form with two main sections: 'Assessment Information' and 'Pre-Test'.
Assessment Information:
 * **Test Type:** Pre-Test (dropdown)
 * **Assessment Category:** ABE (dropdown)
 * **Type of Assessment:** CASAS (dropdown)
 * **Assessment Type Other:** (text field)
 * **Assessment Form/Version info:** (text field)
 * **Functional Area:** Reading (dropdown)
 * **Other Functional Area:** (text field)
Pre-Test:
 * **Date of Pre-Test:** 06/15/2018 (calendar icon) Today
 * **Pre-Test Score:** 200 (text field)
 * **Educational Functioning Level:** Beginning ABE Literacy/High Beginning ESL Literacy (dropdown)
 * **Score reflects Basic Skills deficient:** Yes (checkbox)
 At the bottom right are 'Save' and 'Cancel' buttons.

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.

EFL – Post Test

☐ Literacy & Numeracy 1

[Create Literacy & Numeracy Records](#)

Search:

Func't Area - Assess Category	Pre-Test		Year 1 Post		Year 2 Post		Year 3 Post	
	Date	Func't Lvl	Date	Func't Lvl	Date	Func't Lvl	Date	Func't Lvl
<u>Reading</u>	06/15/2018	3						

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 **Func't Area – Assess Category** column on the **EFL** table. In this example, we will select Reading. This will take you back into the assessment record.

EFL – Post Test

Progress/Post Assessments

No progress or post test records found.

Assessments beyond Year 3 are not reportable in the federal extract file, and will not count in federal performance calculations.

[Create Progress/Post Assessment Record](#)

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 [Create Progress/Post Assessment Record](#) link.

Progress/Post Assessments

* Test Type: Post-Test

Assessment Form/Version info:

* Progress Test Score: 225

* Educational Functioning Level: High Intermediate Basic Education/Advanced ESL

* Date Assessed: 07/01/2018 Today

Participant remains Basic Skills deficient: Yes

* Position: Staff

Save Cancel

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.

EFL Gain

Educational Functioning Level for Measurable Skills Gain										2
Create Educational Functioning Level Record										
										Search: <input type="text"/>
Func Area - Assess Category	Pre-Test		Year 1 Post		Year 2 Post		Year 3 Post			
	Date	Func Lvl	Date	Func Lvl	Date	Func Lvl	Date	Func Lvl		
Reading	06/15/2018	3	07/01/2018	6						

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.

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.

AB1111 projects should collect credential attainment outcomes for participants.

[Animation] WIOA mandates that programs that enroll individuals in education or training programs **[Animation]** are expected to document that participants attain the appropriate type of credential for the training program they are enrolled in.

[Animation] Participants have up to one year after program exit to receive their credential. **[Animation]** AB1111 projects should collect credential attainment outcomes for their participants.

Creating a Credential

[WIOA #2243147 - Complete](#)



LWDB:	20 - Mother Lode Job Training	Application Date	05/12/2019
Onestop:	714 - MLC Mother Lode Job Training - Tuolumne	Participation Date:	05/13/2019
Open/Total Activities:	0 / 1	Closure Date:	N/A
		Exit Date:	N/A

Credentials

0

[Create Credential](#)

There are no records to display.

You will enter credential attainment information in the **Credentials** ribbon. To create a credential, expand the gray ribbon called **Credentials**.

Click the [“Create Credentials”](#) link.

Credential Information

* **Credential Received:**
 Other Credential:
 Credential Verification: [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) |
 * **Date Credential Received:** (mm/dd/yyyy) Today
 Associate to Training/Activity record: [Search Activities/Services](#) |
 Agency Code: - | [Agency Code Search](#) |

Activity	Provider	Service/Course	Actual Begin Date	Projected End Date	Actual End Date	Completion Status	Action
300 - Occupational Skills Training (Approved ETPL Provider)	Melrose College	Accounting 404	02/07/2019	12/06/2019			Select

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.

Result of Creating a Credential

Credentials 1

[Create Credential](#)

Search:

ID	Program	APPID	Credential	Source/Source ID	Date Received	Staff Entered
2802	WIOA	2242647	Occupational Skills Certificate or Credential	Enrollment – 2801356	06/26/2019	Bridges, Lyndsey

Page 1 of 1 Rows: 10

Closing Activities

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

Closing an Activity

Activities / Enrollments / Services 6

[Create Activity / Enrollment / Service](#)

Search:

Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	328 - Occupational Skills Training (non-ETPL provider, non-formula) Napa Valley Adult School		Non-WIOA Special Grant 2288 - AB1111	N/A	09/09/2019	12/12/2019	Close
	101 - Orientation No Provider Information		Non-WIOA Special Grant 2288 - AB1111	N/A	09/09/2019	09/09/2019	Close

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.

Closure Information

Enrollment Summary: Enrollment ID: 2813086
 Username: AB1111
 WIOA Application ID: 2244452
 Activity Code: 101 - Orientation
 Activity Dates: 2/14/2020 - 2/14/2020

Last Activity Date: Today

Completion Code: ▼

None Selected

Successful Completion

Unsuccessful Completion

Dropped out of activity

Unknown status

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

ID	Create Date	Subject
No data found.		

<< Back
Finish
Delete

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.

Closed Activities

Activities / Enrollments / Services 6

[Create Activity / Enrollment / Service](#)

Search:

Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
C	328 - Occupational Skills Training (non-ETPL provider, non-formula) Napa Valley Adult School	W	Non-WIOA Special Grant 2288 - AB1111	N/A	09/09/2019	12/12/2019	09/09/2019 Successful Completion

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.

Program Closure, Exit, and Outcome

As your individuals are nearing the end of participation in your program, it's important to understand closure, exit, and outcome.

Program Exit

<EXIT>



Program **Exit** is the last date of service.

- Last date of service for all programs.
- Participant has not received any services for 90 days.
- Participant has no future services scheduled.



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

Exit 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.

The Exit Clock

<EXIT>



The **Exit Clock** refers to the 90 days in which an individual is not receiving any services.

- If no 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.



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.

Program Exit and the Exit Clock



Any additional Staff-Assisted Services requiring significant staff involvement **will** restart the Exit Clock.

Services that **will not** restart the exit clock include:

- Self-Service and Information-Only Services
- Follow-Up Services
- Supportive Services



“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.

How do we know if an activity restarts the exit clock?

WSD19-06, Attachment 2 CalJOBS Activity Codes Detailed Listing - Individual

#	Activity Code Name	Program Affiliation						Reporting Category	Restart Exit Clock?	PIRL	Duration (Days)
		Adult/DW	Youth	NFJP	WP/JVSG	MSFW	TAA				
109	Referred To Community Resource	x			x	x		Basic Career Service (Staff-Assisted)	YES	1113	1
110	Attended Rapid Response	x				x	x	Basic Career Service (Self-Service Information-Only Activity)	NO	908, 1501	1
112	Job Fair	x			x	x		Basic Career Service (Self-Service Information-Only Activity)	NO	1100	1
114	Job Referral: Federal Contractor Job Listing (FCJL)	x			x	x		Basic Career Service (Staff-Assisted)	YES	1109, 1218	1

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.

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)

Creating Case Closure

[WIOA #2243488 - Complete](#)



LWDB:	07 - Golden Sierra Job Training Agency	Application Date:	08/19/2019
Onestop:	187 - 16028 El Dorado County	Participation Date:	08/20/2019
Open/Total Activities:	0 / 2	Closure Date:	N/A
		Exit Date:	N/A

Closure

N/A

[Create Closure](#)

With the Title I Application expanded, click anywhere in the gray ribbon called **Closure** to expand it.

Click the "[Create Closure](#)" link.

The screenshot shows a web form titled "General Information" with the following fields and values:

- Username:** 36943
- Name:** Poppy, Olivia
- Last service date:** 08/21/2019
- Exit Date:**
- Exit Reason:**
- LWIA:** 07 Golden Sierra Job Training Agency
- * Office Location:** 16028 El Dorado County
- Agency Code Search:** [Agency Code Search](#)
- Agency Code:** [Two empty input boxes]
- Case closure date:** 08/21/2019
- * Accountability Closure/Exit Status:** None Selected

The "Accountability Closure/Exit Status" dropdown menu is open, showing the following options:

- None Selected
- Invalid SSN or failed to disclose SSN
- Retirement
- Neither condition applies

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.”

Outcome Information

School Status at Exit: Not attending school, H.S. Graduate

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

✓ Documentation in Case File

- None Selected
- In-school, High School or less
- In-school, Alternative School
- In-school, post High School
- Not attending school, or H.S. Dropout
- Not attending school, H.S. Graduate
- Not attending school; within age of compulsory school attendance

* **Youth Placement at Exit:**

Placement Date: None Selected

- Entered post-secondary education
- Entered Advanced training
- Entered Military Service
- Entered a qualified apprenticeship
- None of the above

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.

Employment Information

* Entered Employment: None Selected
Yes ←
Yes, Recall Employer
No

No employers available.

[\[Add Employer \]](#)

Staff Information

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

ID	Create Date	Subject	Action
		Edit	 

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

[Save](#) [Cancel](#) [Delete](#)

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.

Entering Employer Information

Add/Edit Employer

Employer Information

[Search Individual Employment History](#) [Select from Internal Job Order/Placement](#)

* Employer Name:

Verify Employer Name: [\[Verify | Scan | Upload | Link \]](#)

Employer FEIN:

Address Line 1:

Address Line 2:

City:

State/Province:

County/Parish:

Zipcode:

Find Zip Code: [\[USPS \]](#)

Country:

Industry Code (NAICS): [Search for NAICS Code](#)

Industry NAICS Code:

Industry NAICS Description:

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.

Entering Employer Information

* Primary Employer Contact Name:

* Primary Employer Contact Phone Number:
 - - Ext

Primary Employer Contact Email:

Is this employer a federal contractor? Yes No

Job Information

* Job Title:

* Occupation: [Select Occupation](#)

* Is this a green job? Yes No

* Hours Worked per Week:

* Hourly Wage:

* Job Start Date: MM/YY

* Job End Date: MM/YY Currently Employed

* Reason for Leaving:

Additional Information on reason for leaving:

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

Entering Employer Information

*Primary Employer: Yes No

*Receiving Fringe Benefits: Yes No

Receiving Health Care Benefits: Yes No

*Job Covered by Unemployment Compensation: Yes No

*Is this Entrepreneurial and/or Self-Employment?: Yes No

*Is this a Registered Apprenticeship? Yes No

*Is this active Military Service? Yes No

*Is this considered Non-Traditional Employment? Yes No

Is this considered Training Related Employment?

None Selected

Add to Employment History: Yes No

Save

Cancel

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

Once complete, select the "Save" button.

Added Employment Information

Employment Information

• Entered Employment:

Employer Name	Job Title	Start Date	End Date	Non-Traditional	Training Related	Action
Target	Customer Service Representativ	02/23/2017		No	No	Edit Delete

[\[Add Employer \]](#)

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

Program Outcome

Exit

- Also called “soft exit” or “common exit”
- System generated

Exclusionary Outcome

- Other exit reason: incarceration, hospitalization, medical treatment, reservist called to active duty, in foster care moved out of area, death
- Manually entered by staff

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.

Exit

How does this work in CalJOBS?

[WIOA #18272526 - Case Exited](#)



LWDB:	01 - Alameda County Workforce Development Board	Application Date:	09/17/2018
Onestop:	1853 - ALA A/D North Cities SWN	Participation Date:	09/17/2018
Open/Total Activities:	0 / 4	Closure Date:	11/07/2018
		Exit Date:	11/07/2018

Exit / Outcome

11/07/2018

[Edit Exit/Outcome](#)

Exit Date: 11/07/2018

Exit Reason: Soft Exit

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".

Exclusionary Outcome

How does this work in CalJOBS?

[WIOA #2243147 - Complete](#)   

	LWDB: 20 - Mother Lode Job Training	Application Date: 05/12/2019
	Onestop: 714 - MLC Mother Lode Job Training - Tuolumne	Participation Date: 05/13/2019
	Open/Total Activities: 1 / 2	Closure Date: N/A
		Exit Date: N/A 

 **Exit / Outcome** N/A

[Create Exit/Outcome](#) 

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.

General Information

Login Name: TYLERBANKS22

User ID: 36658

State ID: 34131

Name: Tyler Banks

* LWIA/Region: Mother Lode Job Training

* Office Location: MLC Mother Lode Job Training - Tuolumne

* Staff Position: Staff

Exit Information

* Exit Date: 07/19/2019 Today

Exit Reason: None Selected
Institutionalized
Health/Medical
Deceased
Reservist called to Active Duty
In Foster Care and moved from area by foster care system

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.

WIOA #18272526 - Case Exited



LWDB:	01 - Alameda County Workforce Development Board	Application Date	09/17/2018
Onestop:	1853 - ALA A/D North Cities SWN	Participation Date:	09/17/2018
Open/Total Activities:	0 / 4	Closure Date:	11/07/2018
		Exit Date:	11/07/2018

Exit / Outcome

11/07/2018

[Edit Exit/Outcome](#)

Exit Date: 11/07/2018

Exit Reason: Institutionalized

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.

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.

Activity Code	Activity Title	Provider Type
F01	Referral to Community Resources	PS - Office Services
F02	Referral to Medical Services	PS - Office Services
F03	Tracking Progress on the Job	PS - Office Services
F04	Work-Related Peer Support Group	PS - Other
F05	Assistance Securing Better Paying Job	PS - Office Services
F06	Career Development and Further Education Planning	PS - Office Services
F07	Assistance with Work-Related Problems	PS - Office Services
F08	Adult Mentoring	PS - Other

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."

Follow-Up Activities – F Codes

Activities / Enrollments / Services 3

[Create Activity / Enrollment / Service](#)

Search:

Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
C	F06 - Career Development and Further Education Planning No Provider Information	W	Non-WIOA Special Grant 2288 - AB1111	N/A	06/26/2019	06/26/2019	06/26/2019 Successful Completion

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.

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

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 90th day after exit. If the closure tab was utilized, data from that tab may pull over into the follow-up forms.

Follow-Up Forms

Follow-ups

4

[Create Local Follow Up](#)

Search:

Required By	Date Complete	Status	Follow Up Type
03/31/2019	03/31/2019	Completed	1st Quarter After Exit
06/30/2019		Required	2nd Quarter After Exit
09/30/2019		Required	3rd Quarter After Exit
12/31/2019		Required	4th Quarter After Exit

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.

[Follow-up Employment Information](#)
[Contact Attempts](#)
[Current Status at Follow-up](#)

General Information

AppID: 18272526
WIOA Follow-up: 2 - 2nd Quarter after
Status: Required
Working With: CYNTHIA COX
Username/Login Name:
User ID:
State ID:
Address:
Prime Phone:

Contact Attempts

Attempt Number	Date	Time	Type Of Contact
No contacts have been attempted.			

[Add Contact Attempt](#)
[Exit Follow-up Screen](#)

Follow-up Employment Information

Employer Name:

If no previous employment was entered in the Closure Form or in previous follow-ups, add the new employer information

Employer Contact and Phone:

*Worked in Quarter 10/1/2018 - 12/31/2018? Yes No

[\[Add Employer \]](#)

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.

Follow-up Employment Information

Employer Name: Comfort Keepers
3755 Washington Blvd
Fremont, CA 94538

Employer Contact and Phone: HR
510-789-1900

*** Worked in Quarter 4/1/2019 - 6/30/2019?** Yes No

Use primary employer from previous quarter? Yes

Qtr	Employer Name	Primary Employer	Job Title	Start Date	End Date	Non-Traditional	Training Related	Action
1	Comfort Keepers	Yes	Caregiver	07/23/2018		No	No	Edit Delete

If previous employment was entered in the closure form or in previous follow-ups, the information will appear here

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.

Post-Exit Placement Information

Previous Follow-up Placement and Date Information: Not Applicable

* Placement in Quarter 4/1/2019 - 6/30/2019: None Selected

Date of Placement: Today

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

- None Selected
- Occupational Skills Training (including advanced training)
- Post-secondary Education
- Secondary Education
- No Placement

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.

Current Status at Follow-up

Follow-up Information:

* Actual Date of Follow-Up: [Today](#)

* Contact Type:

Other (specify):

This section is required only when no employment, no youth placement and no youth diploma/credential is recorded on the follow-up screen.

Follow-up Status

Status at Follow-Up:

Other (specify):

Comments:

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 (noted in blue text).

Follow-Up Forms

Follow-ups 4

[Create Local Follow Up](#)

Search:

Required By	Date Complete	Status	Follow Up Type
03/31/2019	03/31/2019	Completed	1st Quarter After Exit
06/30/2019	06/30/2019	Completed	2nd Quarter After Exit
09/30/2019		Required	3rd Quarter After Exit
12/31/2019		Required	4th Quarter After Exit

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.

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.

Participant Reports

- Credentials
- Case Closure Reportable Performance Indicator



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 (ie. enrolled in a special grant).

Case Management Reports > Case Load Credentials

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

Case Management Reports

[Case Load](#)

Display Case Load Reports

[Case Load - Non-WIOA](#)

Display Case Load - Non-WIOA Reports

[Case Load - WIOA](#)

Display Case Load - WIOA Reports

[Documentation](#)

Display Documentation Reports

[Payment](#)

Display Payment Reports

[Staff Referrals](#)

Display Staff Referral Reports

Case Load:

Advanced

- [Active Cases](#)
- [Application](#)
- [Case Closure Employment](#)
- [Case Closure Reportable Performance Indicators](#)
- [Co-Enrollment Summary](#)
- [Days since Last Active Service](#)
- [Enrollment Summary By LWIA](#)
- [Hourly Wage Before and After Enrollment](#)
- [Obtained Employment](#)
- [Projected Begin Dates](#)
- [Quarterly Follow Up Status](#)
- [Summary](#)
- [Veteran Data Discrepancies](#)
- [Active Enrollment](#)
- [Assigned Case Load](#)
- [Case Closure Information](#)
- [Case Summary By Application Date](#)
- [Credentials](#)
- [Eligibility Enrollments](#)
- [Exited Cases](#)
- [Measurable Skill Gains](#)
- [Participants Co-enrolled in Partner Programs](#)
- [Projected End Dates](#)
- [Soon to Exit Cases](#)
- [Targeted Measurable Skill Gain](#)
- [Exit Reason Summary](#)

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.

Report Filters

The screenshot displays a web-based report filter interface with four numbered sections:

- 1. Program:** A dropdown menu for 'Program' is set to 'Title I - Workforce Development (WIOA)'. Below it, a 'Customer Group' dropdown is set to 'None Selected'.
- 2. Location:** This section includes radio buttons for 'Region/LWDB Status' (Active, Inactive, All) and 'Office Status' (Active, Inactive, All). The 'Region/LWDB' dropdown is set to 'WIOA Statewide Grant Contractor'. The 'Office' dropdown is set to 'RSE Rising Sun Energy Center'.
- 3. Grant:** This section includes radio buttons for 'Grant Status' (Active, Inactive, All). The 'Grant Type' dropdown is set to 'NonWIOA Special Grant'. The 'Available Grants' list includes '399 - 2040 - Youth Ex-Offender Participant', '402 - AB 2060 3.0 Participants', '414 - P2E Direct Services', and '415 - P2E Supportive Services / Earn and Learn'.
- 4. Date:** This section includes a 'Filter By Date' dropdown set to 'Credential Date'. The 'Date Range' is set to 'Last 30 Days'. The 'From' date is '09/02/2018' and the 'To' date is '10/01/2018'. There are 'Reset Dates' and 'Run Report' buttons at the bottom.

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. If you are a Non-Local organization, be sure to select “WIOA Statewide Grant Contractor”.
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.”

Results

Credentials Program: Title I - Workforce Development (WIOA) Region/LWIA: WIOA Statewide Grant Contractor Office: ELD ABLE-DISABLED ADVOCACY, INC. Grant Type: Statewide Adult Grant: 411 - 1152- DEA Phase V Credentials with Provider Only: No Filter By Date: Credential Date Date Range: 8/2/2018 - 8/1/2019													
User ID	State ID	App ID	Name	Office	Participation Date	Closure Date	Exit Date	Assigned Staff	Credential Type	Credential Date	Provider	Page Reported	
36750	34166	2243231	Morgan, Tim	ELD ABLE-DISABLED ADVOCACY, INC.	06/12/2019	06/13/2019			Occupational Skills Certificate or Credential	06/13/2019	Cheese Institute of America	Enrollment ID:2812116	
Total Individuals: 1												Total Credentials: 1	

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

Case Closure Reportable Performance Indicator

This report shows performance indicator information pertaining to credentials, school status and diploma, and employment placement. Much of this data is derived from the Case Closure form in the individual's profile.



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.

Case Management Reports > Case Load Case Closure Reportable Performance Indicators

The screenshot displays a web application interface for Case Management Reports. On the left, a navigation menu is shown with 'Detailed Reports' highlighted (1). The main content area is titled 'Case Management Reports' (2) and contains several links: 'Case Load' (highlighted with a red arrow), 'Case Load - Non-WIOA', 'Case Load - WIOA', and 'Documentation'. Below this, a 'Case Load:' section (3) lists various report options, with 'Case Closure Reportable Performance Indicators' highlighted by a red arrow. The list includes:

- Active Cases
- Application
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Summary
- Days since Last Active Service
- Enrollment Summary By LWIA
- Hourly Wage Before and After Enrollment
- Obtained Employment
- Projected Begin Dates
- Quarterly Follow Up Status
- Summary
- Veteran Data Discrepancies
- Active Enrollment
- Assigned Case Load
- Case Closure Information
- Credentials
- Eligibility Enrollments
- Exited Cases
- Measurable Skill Gains
- Participants Co-enrolled in Partner Programs
- Projected End Dates
- Soon to Exit Cases
- Targeted Measurable Skill Gain
- Exit Reason Summary

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.

Report Filters

The screenshot displays the 'Report Filters' interface with four numbered callouts:

- 1** Points to the 'Report Type' section, which includes a 'Report Type' dropdown menu currently set to 'Both - Displays all closure types'.
- 2** Points to the 'Program' section, which includes a 'Program' dropdown menu set to 'Title I - Workforce Development (WIOA)' and a 'Customer Group' dropdown menu with options: 'None Selected', 'Adult', 'Youth', and 'Dislocated Worker'.
- 3** Points to the 'Location' section, which includes radio buttons for 'Region/LWDB Status' (Active, Inactive, All) and 'Office Status' (Active, Inactive, All). It also features two dropdown menus for 'Region/LWDB' and 'Office Location', both with 'WIOA Statewide Grant Contractor' selected.
- 4** Points to the 'Date' section, which includes a 'Filter By Date' dropdown menu set to 'Actual Case Closure', a 'Date Range' dropdown menu set to 'Last 30 Days', and 'From' and 'To' date fields with calendar icons. The 'From' field is set to '09/02/2018' and the 'To' field is set to '10/01/2018'. A 'Run Report' button is located at the bottom right of the 'Date' section.

1. In the **Report Type** area, select “Both- Displays all closure types” in the **Report Type** drop-down.
2. In the **Program** area, select “Title I – Workforce Development (WIOA)” 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/LWIA** 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.

Results

Case Management Reports Case Closure Reportable Performance Indicators - Detail Report

- Report Type: Both - Displays all closure types
 - Program: Workforce Innovation and Opportunity Act (WIOA) Program
 - Customer Group: Adult
 - LWIA/Region: Alameda County Workforce Investment Board
 - Filter By Date: Actual Case Closure
 - Date Range: 01/01/2017 - 06/14/2017

* Indicates that column may be used for federal reporting when all countable criteria is met, please refer to your programs guidance on when data is countable for performance

App #	State ID	Name	Office	Case Manager	Credential*	Credential Other	CredentialDate*
14281967	29425296	LEAK, JESSICA	ALA Eden AJCC	Leroy Gainey	Occupational Skills Certificate or Credential		11/14/2014
14746749	1000925500	Darghous, Chams	ALA Tri Cities AJCC	Trisha Tran	Occupational Skills Certificate or Credential		12/17/2015
14767360	998437563	REYNOSO, RENE	ALA Eden AJCC	Chelsea Detweiler			
14774778	1001093745	Kankou, Artisom	ALA Alameda AJCC	Nia Ford	Occupational Skills Certificate or Credential		08/30/2015

School Status*	Attained Diploma*	Diploma Date*	Entered Employment	Youth Placement	Placement Date	Close Date
			09/11/2016			01/03/2017
Not attending school,H.S. Graduate			02/27/2017			03/07/2017
			12/01/2015			02/07/2017

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

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

In this training, we:

- 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

Questions



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