

# **P2E CalJOBS<sup>SM</sup> Participant Training Webinar Series**

## **Part 2B: IEP, Activities and Case Notes, Alerts and Case Management**

# Housekeeping



**Sign In – Name and Organization**



**Adobe Connect 'Questions' Pod**



**Adobe Connect 'Resources' Pod**



**PDF Slide Decks**

# Agenda

**Day 1 – Monday, Sept 23**

**9:30AM – 11:30AM**

- Introduction to CalJOBS and system navigation
- Customization and navigation tips and tricks
- Completing Individual Registration

# Agenda

**Day 2 – Tuesday, Sept 24**

**9:30AM – 11:30AM**

- Completing the WIOA Title I Program Application
- Creating Participation

***LUNCH BREAK***

***11:30AM-1:00PM***

**Day 2 – Tuesday, Sept 24**

**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, Sept 26**

**9:30AM – Noon**

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

# Part 2B Objectives

- Complete the Individual Employment Plan (IEP)
- Add Activity Codes and Case Notes
- Review Case Assignment and System Alerts
- Demonstrate how to configure and run Participant Reports

# **Completing an Individual Employment Plan (IEP)**

# Staff Profiles > Plan

An Individual Employment Plan (IEP) is a case management tool which tracks a participant's goals, objectives, and services.

- [-]  **Staff Profiles**
- [+]  General Profile
- [-]  **Case Management Profile**
  -  Case Summary
  -  Programs
  -  **Plan**
  -  Assessments
- [+]  Report Profile

# Why use the IEP

Using the IEP, staff will be able to:

- Develop a professional plan
- Define a goal
  - Employment / Training / Skills
- Set objectives for the goal
- Review completed services and activities concerning the goal
- Develop employment plans and service strategies

# IEP Process Flow

When creating an IEP...



**Plan**

**Goals**

**Objectives**

When closing an IEP...



# Demo time!



# Creating an IEP

- An individual can only have one IEP open at a time
- The IEP can be used by both Title I and Title III staff to case manage an individual

The screenshot displays a web application interface for creating an IEP. At the top, there is a navigation menu with three main categories: 'My Individual Profiles', 'My Individual Plans', and 'Staff Profiles'. Under 'Staff Profiles', there are sub-items: 'General Profile', 'Case Management Profile', 'Case Summary', 'Programs', 'Plan' (circled in orange), 'Assessments', and 'Report Profile'. Below the navigation menu, there are four tabs: 'Case Summary', 'Programs', 'Plan' (selected and highlighted in blue), and 'Assessments'. The main content area is divided into two sections. The first section is titled 'Objective Assessment Summary' and contains the text 'There are No Objective Assessment Summaries' and a button labeled 'Create Objective Assessment Summary'. The second section is titled 'Individual Employment Plan/Service Strategy' and contains the text 'There are no Individual Employment Plans/Service Strategies' and a button labeled 'Create Individual Employment Plan/Service Strategy' (circled in orange).

# Plan

## Complete Plan Information (except Plan closed on date)

### Plan Information

\* Plan Start Date

(mm/dd/yyyy)  [Today](#)

\* LWDB/Region

Golden Sierra Job Training Agen ▼

\* Plan started in office location

None Selected ▼

Plan closed on

(mm/dd/yyyy)  [Today](#)

When printing plan do you want to  
print services?

Next >>

[Exit Wizard](#)

# Goals

[Plan](#)

Goals

[Objectives](#)

[Services](#)

 For help click the information icon.

## General Information

**User Name** OLIVIAPOPPY

**User ID** 36943

**Name** Poppy, Olivia

## IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Program	Staff	Status	Action
---	------	------------------	--------------------------	---------	-------	--------	--------

No History Records

[Add New Goal](#)

# Goals

## Goal Information

\* LWDB/Region

Golden Sierra Job Training Agen ▼

\* Office

16028 El Dorado County ▼

\* Program Affiliation

Title I - Workforce Development (WIOA)

\* Type of Goal

None Selected ▼

Employment  
Training  
Schooling

\* Term of Goal

None Selected ▼

Short Term  
Long Term  
Intermediate Term

\* Description of Goal

Obtain job as welder. 

\* Date Established

08/20/2019 (mm/dd/yyyy)  Today

\* Estimated Completion Date

01/20/2020 (mm/dd/yyyy)  Today

# Goals

**Actual Completion Date**  (mm/dd/yyyy)  [Today](#)

**\* Completion Status**

**Reason Closed**

**Goal Details(Comments)**

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

**Format** **Font** **Size** **A**    

**Save** **Cancel**

Fill any comments in the Goal Details box

## IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Program	Staff	Status	Action
4556	Employment - Obtain job as welder.	08/20/2019	01/20/2020	WIOA	Bridges, Lyndsey	Open	<a href="#">Edit</a> <a href="#">Delete</a>

[Add New Goal](#)

[Exit Wizard](#)



- Staff can create multiple goals for an individual
- Click Next to add an Objective to the IEP Goal

# Objectives

[Plan](#)

[Goals](#)

Objectives

[Services](#)

 For help click the information icon.

## General Information

User Name OLIVIAPOPPY

User ID 36943

Name Poppy, Olivia

Staff may either click Add new objective  
or Select pre-defined objectives

## Objective Information

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status
No Objective Records						

[Add new objective](#)

[Select pre-defined objectives](#)

## Objective Information

\* Goal

Obtain job as welder. ▼



\* LWDB/Region

Golden Sierra Job Training Agen ▼

\* Office Location

16028 El Dorado County ▼

\* Program Affiliation

Title I - Workforce Development (WIOA) ▼



If selecting pre-defined objectives,  
complete the required fields

	Pre-defined Objectives	Date Established	Review Date
<input type="checkbox"/>	Resume Writing	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>
<input type="checkbox"/>	Counseling	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>
<input type="checkbox"/>	Mentoring	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>
<input type="checkbox"/>	Skill Assessment	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>	<input type="text"/> (mm/dd/yyyy)  <a href="#">Today</a>

Created By

31890

Save

Cancel

# Objectives

Add a new or unique objective

## Objective Information

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status	action
Obtain job as welder.	Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open	<a href="#">Edit</a> <a href="#">Delete</a>

[Add new objective](#)

[Select pre-defined objectives](#)

[Exit Wizard](#)

<< Back

Next >>

## Objective Information

* Goal	Obtain job as welder. ▼
Goal Date Established	8/20/2019
* LWDB/Region	Golden Sierra Job Training Agen ▼
* Office Location	16028 El Dorado County ▼
* Program Affiliation	Title I - Workforce Development (WIOA) ▼
* Objective	Enroll in welding program

- Attach the objective to the appropriate goal from the drop-down (date will auto-fill)
- LWDB, Office will auto-fill; choose Title I Program
- Enter short objective description

\* **Date Established**  (mm/dd/yyyy)  [Today](#)

\* **Review Date**  (mm/dd/yyyy)  [Today](#)

**Actual Completion Date**  (mm/dd/yyyy)  [Today](#)

**Completion Status**

**Reason Closed**

**Created By**

**Last Edited By**

Objective Details  
(Comments)

Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

**B I U I<sub>x</sub>** |     |        

Format | Font | Size | **A** |  |  |   |  

- Enter Date Established; Review Date will auto-fill
- Leave Actual Completion Date blank and Reason Closed “None Selected”; Completion Status “Open”
- Enter objective description in text box

## Objective Information

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status	action
Obtain job as welder.	Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open	<a href="#">Edit</a> <a href="#">Delete</a>
Obtain job as welder.	Enroll in welding program	08/21/2019	10/05/2019	WIOA	Bridges, Lyndsey	Open	<a href="#">Edit</a> <a href="#">Delete</a>

[Add new objective](#)

[Select pre-defined objectives](#)

[Exit Wizard](#)



# Services

[Plan](#)[Goals](#)[Objectives](#)[Services](#)

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## General Information

User Name	OLIVIAPOPPY
User ID	36943
Name	Poppy, Olivia

If a goal is affiliated with the Wagner-Peyser program, subsequent activity codes added to the WP program application will also appear on this tab; likewise with Title I.

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## IEP/ISS Services

App # - program	Service/Activity	Begin Date	End Date	Provider	Staff
2243488 - WIOA	101 - Orientation	A - 08/20/2019	A - 08/20/2019		31890
2243488 - WIOA	205 - Development of IEP/ISS/EDP	A - 08/20/2019	A - 08/20/2019	Employment Service	31890

[Exit Wizard](#)

<< Back Finish Delete

# Completed IEP

## Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
4271	Golden Sierra Job Training Agency	16028 El Dorado County	OPEN	1	Bridges, Lyndsey	08/20/2019	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Display/Print</a>

- Only one IEP can be created per individual
- Multiple Goals and Objectives may be added to an IEP
- Click Edit to update or close an IEP

Return

Print

**General Information:**

Plan ID: 4271  
User ID: 36943  
Name: Poppy, Olivia  
Plan was started on: 08/20/2019  
Plan was started in office location: 16028 El Dorado County  
Plan closed on:

**Goals and Objectives Established:**

Goal # /Goal ID	Program Affiliation (s)	Type of Goal	Term of Goal	Date Established	Estimated Date of Completion	Actual Completion Date	Status
1/4556	WIOA	Employment	Intermediate Term	08/20/2019	01/20/2020		Open

**Goal Description:** Obtain job as welder.

**Comments:** Olivia Poppy would like to gain employment as a welder. She has completed a couple welding classes at the local community college, but she did not finish the program.

**Objectives to Goal #1**

Objective	Date Established	Review Date	Program	Staff	Status
Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open

**Comments:**

Enroll in welding program	08/21/2019	10/05/2019	WIOA	Bridges, Lyndsey	Open
---------------------------	------------	------------	------	------------------	------

**Comments:** Enrolling in a welding credential program at local community college.

**Signatures**

\_\_\_\_\_  
Applicant Signature Date Parent/Guardian Signature Date

\_\_\_\_\_  
Staff Signature Date

# IEP Process Flow

When creating an IEP...



**Plan**

**Goals**

**Objectives**

When closing an IEP...



# Closing an IEP- Objectives

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
4271	Golden Sierra Job Training Agency	16028 El Dorado County	OPEN	1	Bridges, Lyndsey	08/20/2019	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Display/Print</a>

Goal Description	Objective	Date Established	Review Date	Program(s)	Staff	Status	action
Obtain job as welder.	Resume Writing	08/20/2019	10/04/2019	WIOA	Bridges, Lyndsey	Open	<a href="#">Edit</a> <a href="#">Delete</a>
Obtain job as welder.	Enroll in welding program	08/21/2019	10/05/2019	WIOA	Bridges, Lyndsey	Open	<a href="#">Edit</a> <a href="#">Delete</a>

- Click the IEP's Edit link
- Click the Objective's Edit link

<b>* Goal</b>	Obtain job as welder. ▾
<b>Goal Date Established</b>	8/20/2019
<b>* LWDB/Region</b>	Golden Sierra Job Training Agen ▾
<b>* Office Location</b>	16028 El Dorado County ▾
<b>* Program Affiliation</b>	Title I - Workforce Development (WIOA) ▾
<b>* Objective</b>	Enroll in welding program
<b>* Date Established</b>	08/21/2019 (mm/dd/yyyy) 📅 Today
<b>* Review Date</b>	10/05/2019 (mm/dd/yyyy) 📅 Today
<b>Actual Completion Date</b>	08/21/2019 (mm/dd/yyyy) 📅 Today ←
<b>Completion Status</b>	Closed ▾ ←
<b>Reason Closed</b>	Successful ▾ ←

### Complete the Objective Information

- Actual Completion Date
- Completion Status
- Reason Closed



# Closing an IEP- Goals

## IEP/ISS Goals

#	Goal	Date Established	Est. date for Completion	Program	Staff	Status	Action
4556	Employment - Obtain job as welder.	08/20/2019	01/20/2020	WIOA	Bridges, Lyndsey	Open	<a href="#">Edit</a> <a href="#">Delete</a>

- Can only close Goals once all associated Objectives are closed
- Select the Goal's Edit link
- Complete the Goal Information

Save
Cancel

**\* LWDB/Region** Golden Sierra Job Training Agen

**\* Office** 16028 El Dorado County

**\* Program Affiliation**  Title I - Workforce Development (WIOA)

**\* Type of Goal** Employment

**\* Term of Goal** Intermediate Term

**\* Description of Goal** Obtain job as welder.

**\* Date Established** 08/20/2019 (mm/dd/yyyy) Today

**\* Estimated Completion Date** 01/20/2020 (mm/dd/yyyy) Today

**Actual Completion Date** 08/21/2019 (mm/dd/yyyy) Today

**\* Completion Status** Closed

**Reason Closed** Successful

# Closing an IEP- Plan

- Close all Objectives and Goals prior to closing the Plan
- Enter **Plan closed on** date and click “Next” to finish

**Plan Information**

\* Plan Start Date  (mm/dd/yyyy)  [Today](#)

\* LWDB/Region  ▼

\* Plan started in office location  ▼

Plan closed on  (mm/dd/yyyy)  [Today](#) 

Recording the IEP Plan Closure Date will lock-down the form and prevent any additional modifications.

# Closed IEP

## Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
4271	Golden Sierra Job Training Agency	16028 El Dorado County	CLOSED	1	Bridges, Lyndsey	08/20/2019	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Display/Print</a>

Create Individual Employment Plan/Service Strategy

Closing an IEP will not close the IEP activity code in the program application

# **Adding Activities and Case Notes**

# CalJOBS Activity Codes

## What are activity codes?

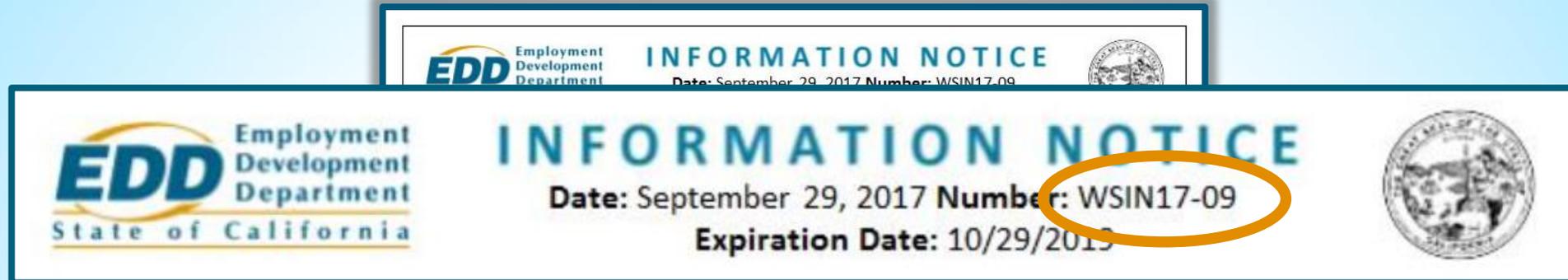
“If it’s not in CalJOBS, it didn’t happen.”

The screenshot shows the CalJOBS website homepage. At the top, there is a navigation bar with the CalJOBS logo, a search bar, and links for 'En Español', 'Sign In', 'Register New User', and 'Forgot Password?'. Below the navigation bar is a large banner with the text 'IT'S YOUR MONEY GET IT!' and 'FIND OUT HOW CalEITC4Me.org'. To the right of the banner is the CalEITC logo. Below the banner are four buttons: 'Find a Job', 'Find a Candidate', 'Find an Office', and 'More Career Services'. Below these buttons is a search bar with the text 'Search for jobs in your area.' and a 'Quick Job Search' section with input fields for 'Enter Keyword', 'Enter City', 'Enter ZIP Code', and a dropdown menu for '10 miles'. At the bottom, there is a 'Useful Links' section with links for 'CalJOBS Mobile App Available', 'Access California's Only ETPL', 'Find Jobs Fairs And Workshops in Your Area', and 'Need Assistance With Your CalJOBS Account?'. The footer contains contact information for the CalJOBS Help Desk.

# Where to Find CalJOBS Activity Codes

The screenshot shows the top navigation bar of the EDD State of California website. The navigation bar includes the EDD logo, the text "Employment Development Department State of California", and several menu items: "Jobs", "Claims", "Employers", "Newsroom", and "Search". The "Search" menu item is circled in orange. Below the navigation bar is a search bar containing the text "WSIN17-09", which is also circled in orange. To the right of the search bar are search and close icons. Below the search bar is a banner image featuring a bridge and a coastline. The banner text reads: "Our Business Is Your Success" and "Since 1935, we have connected millions of job seekers and employers in an effort to build the economy of the Golden State."

# Where to Find CalJOBS Activity Codes



performance reporting guidance that created a need for a revised list of activity codes. The use of activity codes has a direct relationship to performance measures and should be evaluated closely. Staff should familiarize themselves with the following attachments to ensure accurate use of CalJOBS activity codes.

Attachments are available on the internet:

1. [CalJOBS Activity Codes – Explanation of Attachments](#)
2. [CalJOBS Activity Codes Dictionary](#) ←
3. [CalJOBS Activity Codes Detailed Listing – Individual](#) ←
4. [CalJOBS Activity Codes Detailed Listed – Employer](#) ←
5. [Errata Chronology](#)

# CalJOBS Activity Codes Dictionary

<b>090</b>	<b>Self-Service Skills Self-Assessment</b>  This activity is system generated when an individual completes a CalJOBS self-assessment tool designed to inform and educate him/her about his/her employment strengths and weaknesses.
<b>101</b>	<b>Orientation</b>  An individual attended an orientation informing him/her of the information and services available through the AJCC delivery system. This includes, but is not limited to, Veteran Orientation, WIOA Orientation, and Local Office Orientation.
<b>102</b>	<b>Initial Assessment</b>  AJCC staff conducted an initial assessment of a participant's skill level, aptitude, abilities, interests, and supportive service needs.

# CaJOBS Activity Codes Detailed Listing—Individual

#	Activity Code Name	Program Affiliation						Reporting Category	Restart Exit Clock?	PIRL	Duration (Days)
		Adult/ DW	Youth	WP	JVSG	MSFW	TAA				
110	Attended Rapid Response	x		x		x		Housekeeping	NO	Not Reported	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	x		Basic Career Service (Staff-Assisted)	YES	1109, 1218	1
115	Resume Preparation Assistance	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1104, 1214, 1322	90
117	UI General Information	x		x				Basic Career Service (Self-Service Information-Only Activity)	NO	1100	1
118	UI Claims Assistance	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1112	1
119	Financial Aid Assistance	x		x	x	x		Basic Career Service (Self-Service Workforce Information Service)	NO	1113	1
120	Use of AJCC Resource Room	x		x				Basic Career Service (Self-Service Information-Only Activity)	NO	1100	1
121	Job Referral: Job Outside CalJOBS (non-Federal)	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1105, 1215	1
122	Job Referral: Federal	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1108, 1217	1

# Activity Code Best Practices

Enter activity codes in real time; If you use Projected Begin Dates (PBD), remember to go back and add Actual Begin Dates

- The activity code will “System Close” 30 days after the PBD

<b>Projected Begin Date:</b>	<input type="text"/>	 <a href="#">Today</a>
<b>Actual Begin Date:</b>	<input type="text"/>	 <a href="#">Today</a>
<b>* Projected End Date:</b>	<input type="text"/>	 <a href="#">Today</a>

# Activity Code Best Practices

Close your activity codes within 30 calendar days after the Projected End Date (PED), otherwise “System Closed” will occur

- Once an activity becomes System Closed, the data cannot be changed or updated

<b>Last Activity Date:</b>	<input type="text" value="08/20/2019"/>  <a href="#">Today</a>
<b>Completion Code:</b>	<input type="text" value="Successful Completion"/> ▼

# Activity Code Best Practices

- Be sure to choose the correct Customer Program Group if the individual is eligible for multiple programs
- Enter Service Provider Information for training activity codes

<b>* Customer Program Group:</b>	<div data-bbox="1039 863 1872 1106"><p>None Selected</p><p>10B - Adult - Individualized Services/Training</p><p>93 - Statewide Adult</p><p>97 - Non-WIOA Special Grant</p></div>	
<b>* LWDB:</b>	<div data-bbox="1039 1071 2076 1163"><p>Golden Sierra Job Training Agency</p></div>	

# Adding Activity Codes

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
	<a href="#">102 - Initial Assessment</a> No Provider Information		Non-WIOA Special Grant 2287 - P2E Direct Services	N/A	06/20/2019	06/20/2019	<a href="#">Close</a>

**General Information**

[Service Provider](#)

[Enrollment Cost](#)

[Financial Aid](#)

[Enrollment Budget](#)

[Budget Planning](#)

[Closure Information](#)

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:**6/14/2018  
**Earliest Eligibility Date:**06/14/2018

**Participation Date:** 06/26/2018

**\* Customer Program Group:**

97 - Non-WIOA Special Grant

**\* LWDB:**

Fresno Area Workforce Investment Corporation

**\* Office Location:**

None Selected

**Agency Code Search:**

[Click Here](#)

General Information

Service Provider

Enrollment Cost

Financial Aid

Enrollment Budget

Budget Planning

Closure Information

Enrollment Information

Grant:

2287 - P2E Direct Services

WIOA or Non-WIOA Partner Program:

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

\* Activity Code:

300

Occupational Skills Training - Approved Provider List (IT/

[ Select Activity Code ]

Projected Begin Date:

Today

Actual Begin Date:

06/26/2018

Today

\* Projected End Date:

06/30/2019

Today

Any classes attended through Distance Learning:

Yes  No

Participant has been issued an ITA and the ITA will pay for this service:

Yes

Staff Information ?

Staff ID: 33633

\* Position:

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	Action
No data found.			

[Next >>](#)

[General Information](#)

**Service Provider**

[Enrollment Cost](#)

[Financial Aid](#)

[Enrollment Budget](#)

[Budget Planning](#)

[Closure Information](#)

Enrollment Service Provider Information



**Enrollment Summary:**

Enrollment ID: 2799969  
Username: LUKECAGE  
WIOA Application ID: 2241209  
Activity Code: 300 - Occupational Skills Training - Approved Provider List (ITA)  
Activity Dates: 6/26/2018 - 6/30/2019

**\* Provider:**

GSI Institution of Learning

[\[ Select Provider \]](#)



**\* Service, Course or Contract:**

Medical/Clinical Assistant

[\[ Select Service, Course or Contract \]](#)



**Provider Locations:**

GSI Institution of Learning

6259 W Henderson Blvd  
Sacramento, CA 94204

[\[ Select Provider Locations \]](#)

**Provider Contacts:**

Marcus Welby

[\[ Select Provider Contacts \]](#)

**\* Occupational Training Code:**

31909200 - Medical Assistants

[\[ Occupational Training Code \]](#)



Next >>

[General Information](#)

[Service Provider](#)

**Enrollment Cost**

[Financial Aid](#)

[Enrollment Budget](#)

[Budget Planning](#)

[Closure Information](#)

Enrollment Cost Information

**300 - Occupational Skills Training - Approved Provider List (ITA)**

GSI Institution of Learning

Medical/Clinical Assistant

**Enrollment Summary:** Enrollment ID: 2799969  
Username: LUKECAGE  
WIOA Application ID: 2241209  
Activity Code: 300 - Occupational Skills Training - Approved Provider List (ITA)  
Activity Dates: 6/26/2018 - 6/30/2019

Total costs are itemized below:

**Total Training Costs**

Available: \$1,380.00

Obligated: \$0.00

**Tuition/Fee**



Available: \$1,000.00

Obligated: \$0.00

**Books**



Available: \$300.00

Obligated: \$0.00

**Tools**



Available: \$80.00

Obligated: \$0.00

**Other Costs**



Available: \$0.00

Obligated: \$0.00

Comments

Next >>

[General Information](#)

[Service Provider](#)

[Enrollment Cost](#)

[Financial Aid](#)

[Enrollment Budget](#)

[Budget Planning](#)

**Closure Information**

Closure Information



**Enrollment Summary:**

Enrollment ID: 2799969  
Username: LUKECAGE  
WIOA Application ID: 2241209  
Activity Code: 300 - Occupational Skills Training - Approved Provider List (ITA)  
Activity Dates: 6/26/2018 - 6/30/2019

**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

# Case Note Best Practices

- Go paperless! Enter case notes in CalJOBS to document additional information on services and interactions with individuals
- Create Case Note Templates to save time
- Use Case Note Subject naming conventions
- Attach any supporting documents in the Case Note Attachment section

# Creating a Case Note

## Case Note Template

Autofill by Template:

## Case Note Summary

Case Note ID: 0  
Username: OLIVIAPOPPY  
User ID: 36943  
Name: Olivia Poppy

## Case Note Details

Please check to suppress this Case Note

\* Contact Date:   Today



Type ID:

\* LWDB/Region:

\* Office Location:

\* Program:

App ID:

# Creating a Case Note

**Partner Program:**

**\* Subject:**  

**Contact Type:**

**\* Case Note Description:**



[\[ Clear Text \]](#)


# Creating a Case Note

## Message Options

---

Create Message From Case Note on Save

## Case Note Attachment(s)

---

Listed below are the documents associated with this case note. Click the *View* link below to view that particular item.

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

*Click a column title to sort.*

View Thumbnails

There are no documents for selected search criteria(s). Please change your search criteria.

[ [Add a Document](#) | [Scan a Document](#) ]

Save

Save&Print

Cancel

[Enrollment Cost](#)
[Financial Aid](#)
[Enrollment Budget](#)
[Budget Planning](#)
[Closure Information](#)

### Case Notes:

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

ID	Create Date	Subject	Action
44913	08/21/2019	<a href="#">300 - Enrolled in Occupational Pottery Program</a>	 



 Page 1 of 1 


Rows: 100

[Create Activity / Enrollment / Service](#)



Search:

Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	<a href="#">328 - Occupational Skills Training (non-ETPL provider, non-formula)</a> Napa Valley Adult School		Non-WIOA Special Grant 2287 - P2E Direct Services	N/A	09/09/2019	12/12/2019	<a href="#">Close</a>
	<a href="#">101 - Orientation</a> No Provider Information		Non-WIOA Special Grant 2287 - P2E Direct Services	N/A	09/09/2019	09/09/2019	<a href="#">Close</a>

Activity Status: = Open, = Closed, = System Closed, = Voided

# **System Alerts**

# Alerts

## Communications > Alerts > My Alerts

Alerts make staff aware of specific upcoming dates

☐ Communications	
Messages	
Correspondence	
Alerts	▶ My Alerts
Virtual Recruiter <input type="button" value="Alerts"/>	Text Watch
Email Log	View System Alerts

# My Alerts

Modify My Alert Subscriptions

- Click Modify My Alert Subscriptions
- Select any Alerts to set

Alert Description	Days	Notify
<input type="checkbox"/> <b>WIOA Activity Projected Start Date</b> This alert will notify you when an Individual in your case load has projected WIOA activity start date that is about to occur.	<div data-bbox="1386 891 1651 1100"><p>None Selected</p><p>1 day prior</p><p>5 days prior</p><p>15 days prior</p><p>30 days prior</p></div>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after

# Helpful Alerts

- WIOA Activity Projected Start Date
- IEP Goals Alert
- WIOA Soft Exit
- WIOA Follow-up Alert



Workforce Innovation and Opportunity Act (WIOA) Alerts

	Alert Description	Days	Notify
<input checked="" type="checkbox"/>	<b>WIOA Activity Projected Start Date</b> This alert will notify you when an Individual in your case load has a projected WIOA activity start date that is about to occur.	1 day prior <input type="button" value="v"/>	<input type="radio"/> On the day only <input checked="" type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Activity Projected End Date</b> This alert will notify you when an Individual in your case load has a projected WIOA activity end date that is about to occur.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Soft Exit</b> This alert will notify you when an Individual in your case load is about to soft exit from the WIOA program.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Male Participants about to turn 18</b> This alert will notify you when an Individual in your case load is about to turn 18 years of age.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Younger Youth Goals About to Expire</b> This alert will notify you when an Individual with Youth Goals is about to expire where the status is set but attainment is pending.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Participants expiring work authorization</b> This alert will notify you when an Individual in your case load whose authorization to work is about to expire.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Followup Alert</b> This alert will notify you when an Individual in your case load has a follow-up date that is nearing.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Literacy Numeracy Pre-Test has not been posted</b> This alert will notify you when a Youth is enrolled that meets the requirement for literacy numeracy testing has not had a pre-test posted within 60 days of their first youth service date.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>WIOA Pre-Applications Pending</b> This alert will notify you of pending WIOA Pre-Applications that are completed by individuals.	N/A	N/A
<input type="checkbox"/>	<b>WIOA Literacy Numeracy Post-Test has not been posted</b> The following individual(s) in your case load who have Literacy Numeracy Pre-tests approaching their anniversary date in XX days XX (From Number of Days (e.g. 15)) as of SYSTEM DATE. You should update the literacy numeracy records appropriately.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after
<input type="checkbox"/>	<b>Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity</b> This alert will notify you when an Individual in your case load has not generated any new WIOA activity since the number of days specified.	None Selected <input type="button" value="v"/>	<input checked="" type="radio"/> On the day only <input type="radio"/> Everyday after

# Participant Reports

- Enrolled Individuals
- Services Provided Individuals
- Individual Case Notes
- Saving to My Reports

# Enrolled Individuals Report

This report will provide a summary and/or list of individuals enrolled in a program.



1

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

2

### Individual Reports

<a href="#">Background Information</a> Display Background Information Reports	<a href="#">Enrolled Individual</a> ←
<a href="#">Résumé</a> Display Résumé Rep	

3

**Enrolled:**

Advanced

- [List](#)
- [by Attending School Status](#)
- [by County/Parish](#)
- [by Disability Status](#)
- [by Employment Status at Participation](#)
- [by Grant by Zip Code](#)
- [by Migrant/Seasonal Farm Worker Types](#)
- [by One Stop Office](#)
- [by Region/LWIA](#) ←
- [by Selective Service Registration](#)
- [by Unemployment Status](#)
- [by Web Site Access Location](#)
- [by WIOA Partner Program](#)
- [by Working in Agricultural ONET Occupation Code Status](#)
- [by Zip Code](#)
- [by Age](#)
- [by Cookie Location](#)
- [by Desired Occupation](#)
- [by Educational Achievement](#)
- [by Gender](#)
- [by Hispanic Ethnicity](#)
- [by NEG Grant](#)
- [by Race](#)
- [by Registration Source](#)
- [by Staff Assigned](#)
- [by Ward/Borough/Township](#)
- [by WIOA 15 Percent Grant](#)
- [by Work Status](#)
- [by WP Special Program](#)

# Report Filters

1

### Program

Program:

Customer Group:   
 Adult  
 Youth  
 Dislocated Worker

Partner Program Status:  Active  Inactive  All

Partner Program:

3

### WIA-Specific

Grant Status:  Active  Inactive  All

Grant Type:

Available Grants:

(Press Ctrl to select multiple items)

2

### Location

Region/LWDB Status:  Active  Inactive  All

Region/LWDB:   
(Press Ctrl to select multiple items)

Office Status:  Active  Inactive  All

Office Location:   
(Press Ctrl to select multiple items)

4

### Date

Date Filter:

Date Range:

From:   (mm/dd/yyyy)

To:  (mm/dd/yyyy)

Run Report

# Results

## Enrolled Individuals - By Region

- Participation Date: 3/6/2018 to 3/12/2018  
 - Report Type: Title I - Workforce Development (WIOA)  
 - Customer Group: Adult  
 - Region/LWIA Name: Alameda County Workforce Investment Board

Region	Total	% Total
<a href="#">Alameda County Workforce Investment Board</a>	1	100.00 %
<b>Region</b>	<b>Total</b>	<b>% Total</b>
Total Rows: 1		

## Enrolled Individuals - List

- Participation Date: 3/6/2018 to 3/12/2018  
 - Report Type: Title I - Workforce Development (WIOA)  
 - Customer Group: Adult  
 - Region/LWIA Name: Alameda County Workforce Investment Board

User Name	State ID	App ID	First Name	Last Name	Age at Participation	City	State	Country	Office Location	Agency Code	Agency Name	Assigned Case Mgr	Participation Date	Exit Date	Prior Participation	Map
<a href="#">25728243</a>	451427200	17757938	Omar	Adiong	49	Hayward	CA	US	ALA Tri Cities AJCC	W10	W10 -ALA	Shirley Calvert	03/09/2018		Yes	<a href="#">Map</a>
<b>User Name</b>	<b>State ID</b>	<b>App ID</b>	<b>First Name</b>	<b>Last Name</b>	<b>Age at Participation</b>	<b>City</b>	<b>State</b>	<b>Country</b>	<b>Office Location</b>	<b>Agency Code</b>	<b>Agency Name</b>	<b>Assigned Case Mgr</b>	<b>Participation Date</b>	<b>Exit Date</b>	<b>Prior Participation</b>	<b>Map</b>

Total Enrolled Individuals: 1

# Services Provided Report

This report shows information about specific services provided to individuals by staff members.



# Services Reports > Services Provided Individuals By Services

1

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

2

## Services Reports

[Services Provided Employer](#)  
Display Service Provided Employer Reports

[Services Provided Individuals](#) ←  
Display Services Provided Individuals Reports

3

**Service:**

Advanced

- [List](#)
- [by Activity Completion Status](#)
- [by Education Level](#)
- [by Ethnicity](#)
- [by Grant](#)
- [by MSFW Status](#)
- [by Provider](#)
- [by Region/LWIA](#)
- [by Services](#) ←
- [by Staff Edit](#)
- [by Work Status](#)

Basic

- [by Age](#)
- [by Disabled Veteran Status](#)
- [by Potential Eligibility for Veteran Benefits](#)
- [by Veteran Campaign Status](#)
- [by Access Location](#)
- [by County](#)
- [by Enrollment Characteristics](#)
- [by Gender](#)
- [by Individual](#)
- [by Office](#)
- [by Race](#)
- [by Service Assistance Type](#)
- [by Staff Assigned](#)
- [by Staff Reported](#)
- [by Zip Code](#)
- [by Disability Status](#)
- [by Discharge Status](#)
- [by Selective Service](#)
- [by Veteran Status](#)

# Report Filters

1

### Program

**Program:** Title I - Workforce Development (WIOA) ▼

**Customer Group:** None Selected  
Adult  
Youth  
Dislocated Worker

2

### Location

**Region/LWDB Status:**  Active  Inactive  All

**Region/LWDB:** WIOA Statewide Grant Contractor ▼

**Office Status:**  Active  Inactive  All

**Office Location:** ELD ABLE-DISABLED ADVOCACY, INC. ▼

3

### Activity

**Activity/Service Code:** 218 - Internships  
219 - Work Experience  
221 - Financial Literacy Education  
222 - English Language Learner (ELL)  
224 - Pre-Apprenticeship Training  
225 - Enrolled in Post-Secondary Education  
226 - Reading and/or Math Testing

(Press Ctrl to select multiple items)

4

### WIA-Specific

**Grant Status:**  Active  Inactive  All

**Grant Type:** NonWIOA Special Grant ▼

**Available Grants:** 399 - 2040 - Youth Ex-Offender Participant  
402 - AB 2060 3.0 Participants  
414 - P2E Direct Services  
415 - P2E Supportive Services / Earn and Learn

(Press Ctrl to select multiple items)

5

### Date

Date Filter: Actual Begin Date ▼

Date Range: Current Program Year ▼

From: 07/01/2018 (mm/dd/yyyy)

To: 06/30/2019 (mm/dd/yyyy)

[Reset Dates](#)

Run Report

# Services Provided Individuals - Results

## Services Provided Individuals - All Services

- Program: Title I - Workforce Development (WIOA)
- Region/Lwia: WIOA Statewide Grant Contractor
- Office: ELD ABLE-DISABLED ADVOCACY, INC.
  - Grant Type: Statewide Adult
- Grant: 696 - 1152 - DEA PY 2018-19
- Veteran Information From: Both
- Date Field: Actual Begin Date
  - Start Date: 5/1/2019
  - End Date: 8/12/2019

Activity/Description	Distinct Users	Total Services	% of Total
<a href="#">101 - Orientation</a>	1	1	2.38 %
<a href="#">102 - Initial Assessment</a>	7	7	16.67 %
<a href="#">103 - Provision of Information on Training Providers/Performance Outcomes</a>	7	7	16.67 %
<a href="#">200 - Individual Counseling</a>	10	15	35.71 %
<a href="#">202 - Career Guidance/Planning</a>	2	2	4.76 %
<a href="#">205 - Development of IEP/ISS/EDP</a>	7	7	16.67 %
<a href="#">218 - Internships</a>	3	3	7.14 %
	37	42	100%

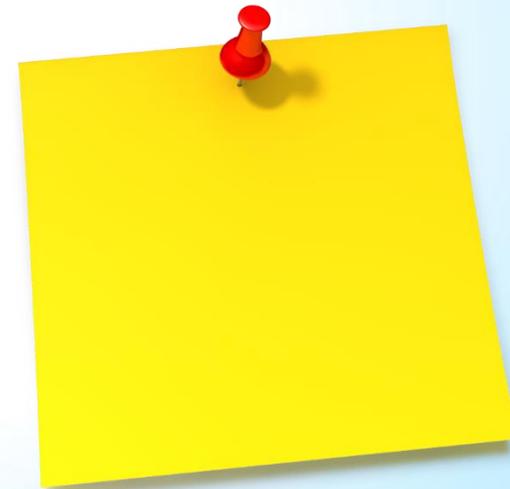
UserName	State ID	Region / LWIA	Office	Office of Responsibility	First Name	Last Name	City, State, Country	Service	Completion Status	Provider	Staff Created	Create Date	Actual Begin Date	Projected Begin Date
<a href="#">36721</a>	34145	WIOA Statewide Grant Contractor	ELD ABLE-DISABLED ADVOCACY, INC.	ELD ABLE-DISABLED ADVOCACY, INC.	Tito	Lolo	Sacramento, CA US	218 - Internships	Successful Completion	One Stop Offices	Cuellar-Lopez, Monica	05/31/2019	05/31/2019	
<a href="#">36750</a>	34166	WIOA Statewide Grant Contractor	ELD ABLE-DISABLED ADVOCACY, INC.	ELD ABLE-DISABLED ADVOCACY, INC.	Tim	Morgan	Sacramento, CA US	218 - Internships	Successful Completion		Blevins, Steven	06/12/2019	06/12/2019	
<a href="#">36750</a>	34166	WIOA Statewide Grant Contractor	ELD ABLE-DISABLED ADVOCACY, INC.	ELD ABLE-DISABLED ADVOCACY, INC.	Tim	Morgan	Sacramento, CA US	218 - Internships	Successful Completion	Cheese Institute of America	Blevins, Steven	06/12/2019	06/12/2019	

Total Rows : 3



# Individual Case Notes Report

These reports retrieve case notes that have been entered by staff in an individual's profile.



# Case Management Reports > Documentation

## Individual Case Notes

1 Reports

My Reports

Summary Reports

Detailed Reports

Custom Reports

Ad-Hoc Query Wizard

Federal Reports

Community College Reports

Live Data

2

### 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

[Predictive](#)

Display Predictive Reports

3

### Case Notes:

Advanced

- [Employer](#)
- [Provider](#)

- [Individual](#)

# Report Filters

1

**Report Type**

Report Type:

**Case Notes**

Case Note Subject:

System Case Notes: (Where Contact Type = 'Form Insert')  Exclude System Case Notes  Include System Case Notes

2

**Program**

Program Status:  Active  Inactive  All

Program:   
(Press Ctrl to select multiple items)  
Title III - Wagner-Peyser (WP)  
Trade Adjustment Assistance (TAA)

3

**Location**

Region/LWDB Status:  Active  Inactive  All

Region/LWDB:   
(Press Ctrl to select multiple items)  
City of Anaheim Workforce Development Division  
**WIOA Statewide Grant Contractor**  
Allan Hancock Joint Community College District

Office Status:  Active  Inactive  All

Office Location:   
(Press Ctrl to select multiple items)  
**RSE Rising Sun Energy Center**  
RUBICON PROGRAMS, INC.  
RURAL HUMAN SERVICES INC.

4

**Date**

Date Range:

From:   (mm/dd/yyyy)

To:   (mm/dd/yyyy)

[Reset Dates](#)

**Run Report**

# Results

## Case Management Report - Case Notes - Individual Case Notes Report

Program: Workforce Innovation and Opportunity Act (WIOA) Program  
 LWIA/Region: WIOA Statewide Grant Contractor  
 Office: L & R Career Center  
 Include System Case Notes: No  
 Date Range: 02/14/2017 - 03/15/2017

↕ Userid	↕ Individual	↕ Created By	↕ Create Date	↕ Contact Date	↕ Last Edited By	↕ Last Edit Date	↕ State ID	↕ Case Subject	↕ Case Notes
<a href="#">32910</a>	Test, John	Rose, Rianna	3/7/2017	3/7/2017	Rose, Rianna	3/7/2017	31866	328 Case Note Test	Case Note Test.
<a href="#">32914</a>	Tester, John	Rose, Rianna	3/13/2017	3/13/2017	Rose, Rianna	3/13/2017	31869	328 Training Activity	Training Activity
↕ Userid	↕ Individual	↕ Created by	↕ Create Date	↕ Contact Date	↕ Last Edited By	↕ Last Edit Date	↕ State ID	↕ Case Subject	↕ Case Notes

Total Rows: 2

# Save to My Reports

1

**Date**

Date Filter:

Date Range:

From:  (mm/dd/yyyy)

To:  (mm/dd/yyyy)

[Reset Dates](#)

The date range selection of "Today" will retrieve real time data.  
Otherwise, data may be up to 24 hours behind.

**Run Report**

[\[Save to My Reports\]](#)

2

CaDOBS - My Reports - Internet Explorer

https://www.caljobs.ca.gov/reports/myreports/myreports.asp?pu=True&ff\_mode=buildmyreportsearchurl&ff\_itemcode

Please enter in a description for this report:

Do Not Share:  Share with everyone that has access to this report:

3

- Reports
- My Reports**
- Summary Reports
- Detailed Reports

4

**My Reports:**

Report Description	Action	Select
Enrolled Individual - Adult	<a href="#">Update Filters</a> <a href="#">Display Report</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Schedule</a>	<input type="checkbox"/>

# Part 2B Summary

- Completed the Individual Employment Plan (IEP)
- Added Activity Codes and Case Notes
- Reviewed Case Assignment and System Alerts
- Demonstrated how to configure and run Participant Reports

# Questions

