



CalJOBS WIOA Data Guide

Table of Contents

Purpose of the Data Guide	1
CalJOBS Individual Registration, WIOA Title I Application, and Enrollment	1
CalJOBS Steps for Each Participant Checklist	2
CalJOBS Registration Process.....	3
Selective Service	6
Right to Work Documentation.....	6
CalJOBS WIOA-Title I Application Process.....	6
How to Create a WIOA Title I Application	7
Creating Participation & Enrollment.....	9
How to Create Participation and Enrollment	9
CalJOBS Enrollment Variations	10
Transgender/Gender Nonconforming Individuals	10
Incumbent Workers.....	12
Citizenship/Undocumented Individuals.....	12
Immigrant Eligibility.....	13
English Language Learners.....	14
Accessing the Grant ID.....	15
Co-enrollment.....	17
Formerly Incarcerated Questions	18
Data Verification and Self-Attestation	18
Grant ID and CalJOBS Activity Codes	19
Local Service Provider	20
Applying to become a provider in CalJOBS	20
Adding Activity Codes.....	20
Flow of Activity Codes	21
Initial Assessment.....	21
Individual Employment Plan (IEP).....	21
Activities/Services.....	22
Measurable Skill Gain (MSG)	23

The five types of MSG:.....	23
How to Record MSG:	23
Credential Attainment	24
How to Create a Credential	24
Case Notes.....	24
Example case note for Pre-Apprenticeship Training enrollment:	25
Example case note for Supportive Services:	25
Example case note not associated with an Activity Code:	26
Case Closures, Exits, and Post-Exit Outcomes.....	26
How to Create a Case Closure.....	26
Program Exit	27
Post-Exit Outcomes	28
Reporting Participant Data to the CWDB.....	28
Progress Reports.....	28
Explanation of CalJOBS Reports.....	29
Enrolled Individuals Reports	29
Predictive – Grant Participants Report	29
Services Provided Individuals Report.....	29
Other Types of Reports.....	30
Appendix I. Personal Information Notice.....	32
Appendix II. Activity Codes	33
Appendix III. Data Change Requests	35
Submitting a Data Change Request (DCR)	35
<i>Step 1: Accessing the DCR Form</i>	35
<i>Step 2: Fill out the “Data Change Request” Form</i>	35
<i>Step 3: Attaching Supplemental Document</i>	37
Approval Consideration Process	38
MIS Administrators.....	39
System Closed vs Soft Exits.....	39
<i>System Closed</i>	39
<i>Soft Exit</i>	39

Appendix IV. References and Additional CalJOBS Resources	41
Statute and Report	41
WIOA and Directives.....	41
CalJOBS.....	41

Purpose of the Data Guide

This guide was created as a comprehensive resource for Fiscal Agents/Awardees when reporting participant data in the California Job Openings Browse System (CalJOBS) as the selected data capture system. Please use this data guide as needed and share it with partners, front-line workers, program administrators, data entry professionals, contractors, etc., as appropriate. This document may be updated throughout the grant term. Updated versions of this document will be posted on the California Workforce Development Board website.

Fiscal Agents/Awardees and their staff who report on behalf of the project must be familiar with CWDB's expectations for reporting and attending all trainings. Fiscal Agents/Awardees who do not comply with reporting requirements may be subject to cash holds and/or other repercussions. The CWDB will conduct data validation reviews every six months to ensure Fiscal Agents/Awardees are accurately entering data. Fiscal Agents/Awardees will be expected to assist in this review where appropriate.

The Research Unit of the Policy, Research, and Legislation Branch will handle participant data collection system technical assistance. For questions or technical assistance relating to participant data collection for CalJOBS, please email the CWDB [Research Unit](#).

CalJOBS Individual Registration, WIOA Title I Application, and Enrollment

The CalJOBS system is designed for federal workforce program reporting and case management. The figure below shows the action items that are available for program staff in CalJOBS.

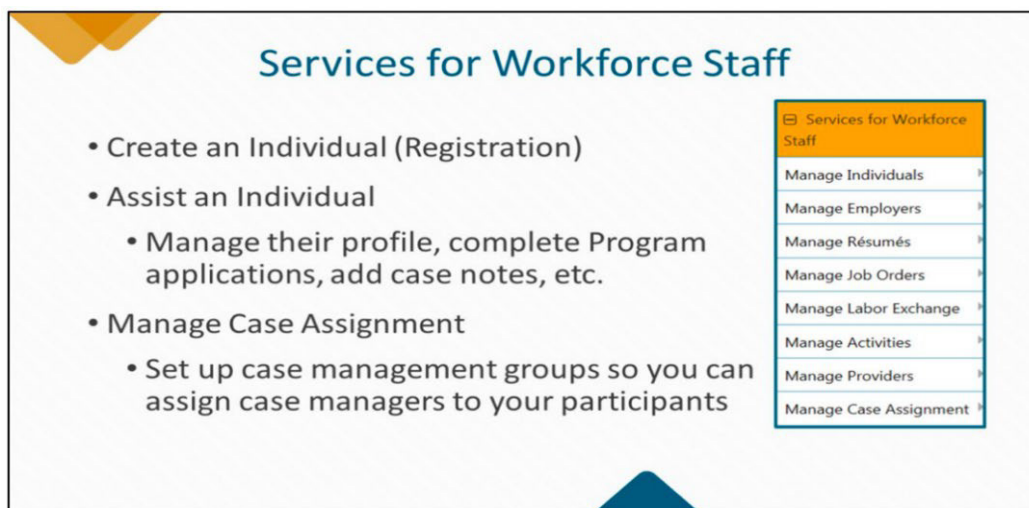


Figure 1 CalJOBS Services for Workforce Staff

Program staff will report the following in CalJOBS:

- Demographic information
- Program eligibility (priority population data)

- Services received
- Employment and earnings outcomes
- Postsecondary educational attainment
- Skill gains

CalJOBS Steps for Each Participant Checklist



Figure 2 Cal Jobs Steps

Below is a general overview of the steps involved when entering data in CalJOBS through the WIOA Title I application.

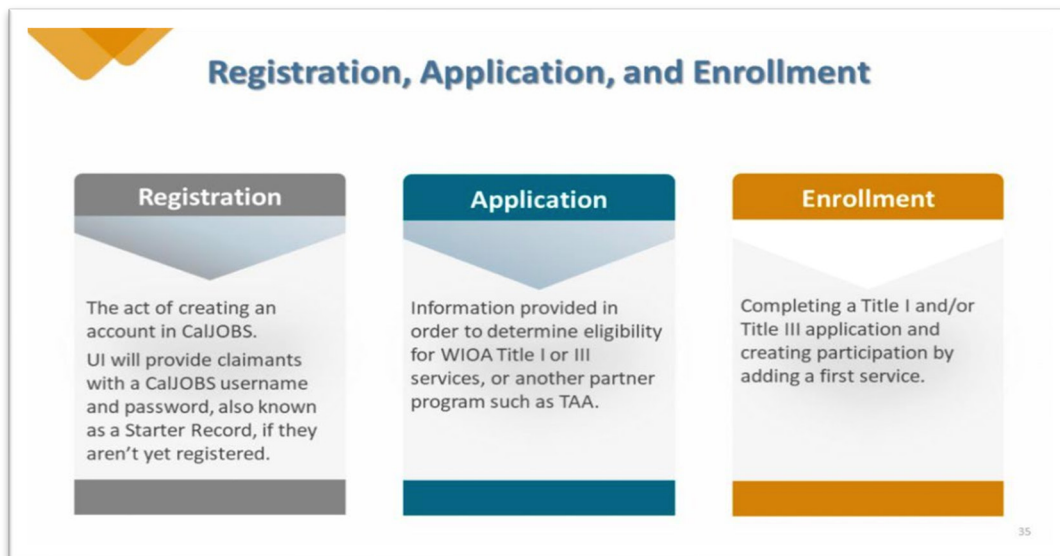


Figure 3 CalJOBS Process

Program staff will take the following steps to register and enter data in CalJOBS.

- Complete a CalJOBS Registration Form. **Note:** If necessary, staff can assist the individual with the form and the process.
- Complete the WIOA Title I application and collect individual eligibility information.
- Enroll the individual by Creating Participation and entering the first Activity Code.
Note: Participants can begin receiving services after enrollment is complete.
- Document services received by participants by using activity codes.
- Complete the Closure Form to indicate that the participant can exit the program.
Note: An Exit Date is generated on the 91st day of the exit. Follow-up services can occur after this date. The individual is tracked for performance during the follow-up period.

CalJOBS Registration Process

Complete a Registration Form to initiate the registration process. The Registration Form captures pertinent demographic information, which helps develop local workforce development project initiatives. All information is self-disclosed, and no proof of any documentation or eligibility is required when completing the Registration Form. Program staff can assist the future participant in completing a Registration Form.

Completing registration and the application are two separate processes. An individual must be registered in CalJOBS *before* program staff can start the *WIOA Title I – Youth, Adult, and/or Dislocated Worker Applications* for enrollment into the initiative (grant program).

Data collected at registration includes:

- Name/SSN
- Contact information
- Demographics
- Public assistance
- Education/Employment
- Farmworker/military service

How to register an individual:

1. Navigate to the www.caljobs.ca.gov homepage.
2. Enter the program staff *Username* and *Password*.
3. Select the *Sign In* button on the right.
4. Read the Staff Sign-in Notice, then select *I Agree*. **Note:** Figure 4, My Staff Workspace (see next page) will appear on the next screen.
5. Select *My Staff Dashboard* on the upper left of the screen.
6. Hover over *Manage Individuals* on the bottom left of the screen shown in Figure 5.
7. Select the *Create an Individual* box outlined in red (Figure 6). **Note:** The red asterisks, blue text, question mark icons, and underlined links throughout the CalJOBS application will help Fiscal Agents/Awardees complete the individual registration.
8. Complete the information in the Login Information fields.

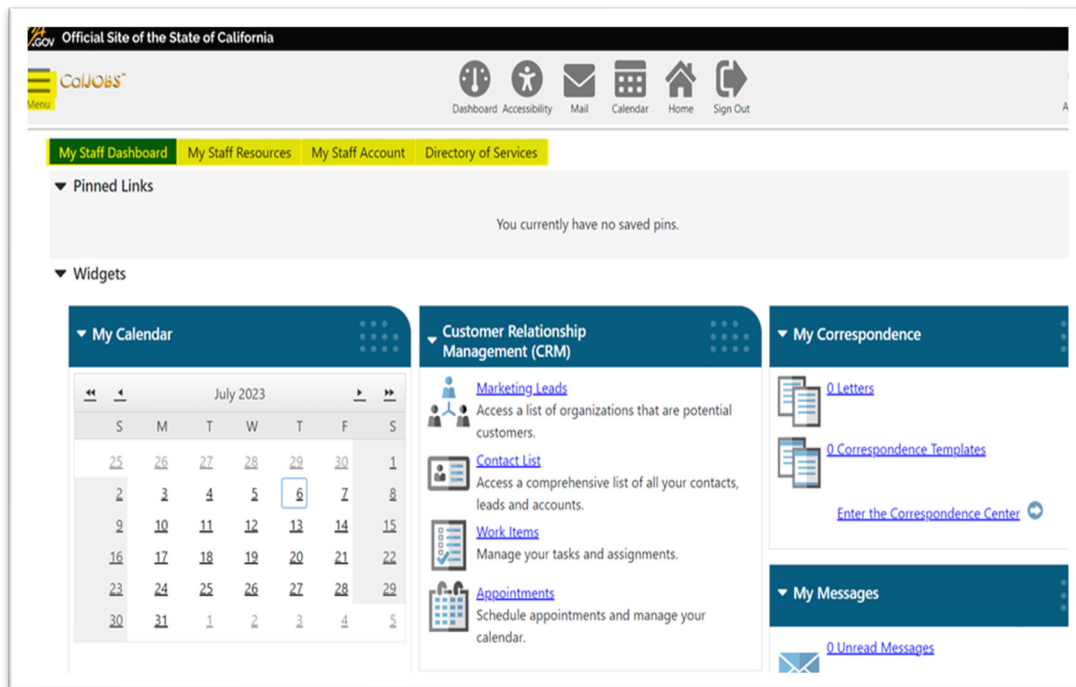


Figure 4 CalJOBS My Staff Workspace

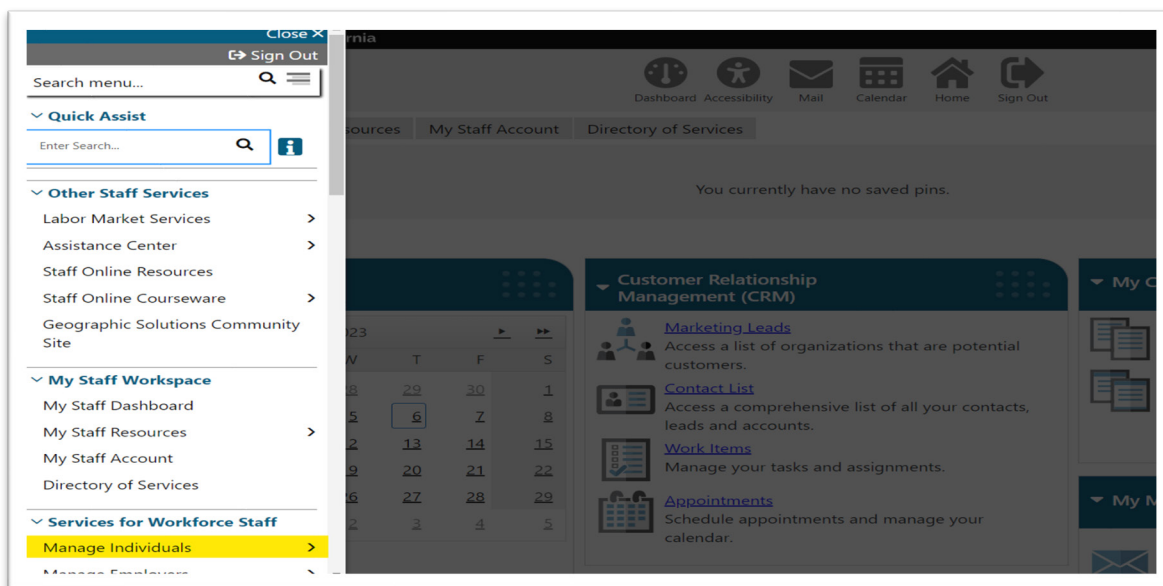


Figure 5 Expanded View of Menu in Left-Handed Corner

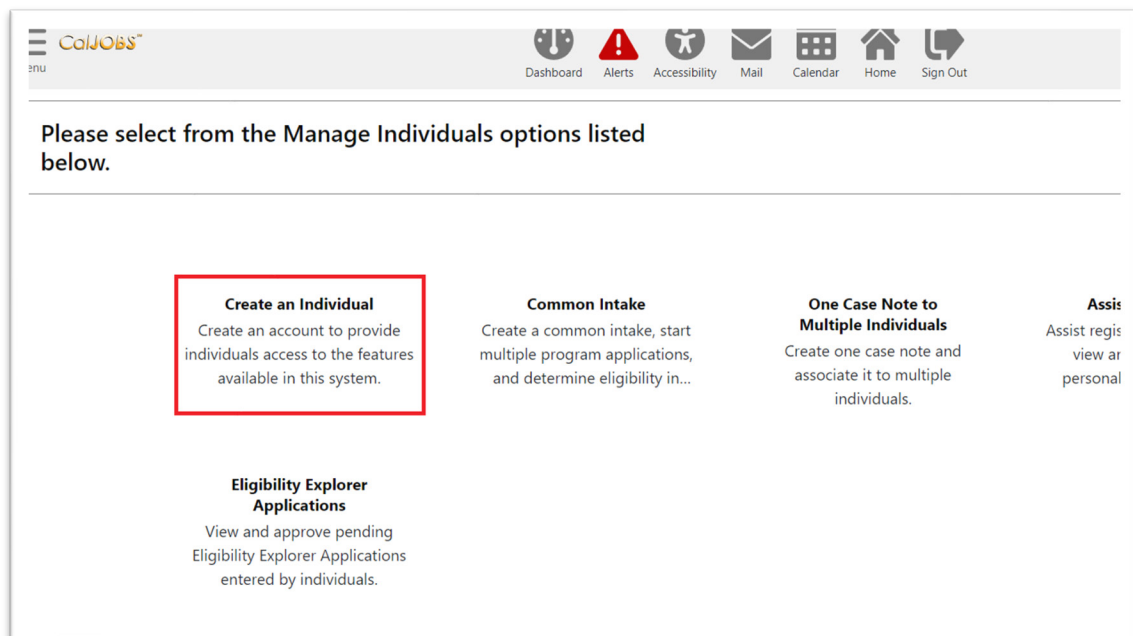


Figure 6 Select Create an Individual Option

9. In the individual's Social Security Number section, enter the individual's SSN or pseudo SSN in the appropriate section.
10. Enter the individual's zip code in the Primary Location Information section and enter the Use the *Find Zip Code* link if it's not available.
11. Answer whether you are authorized to work in the United States. **Note:** Undocumented individuals are eligible, but a pseudo SSN must be requested and created. Refer to the [Citizenship/Undocumented Individuals](#) section in this data guide for further guidance regarding pseudo SSNs.
12. Enter the participant's first and last name (middle initial is optional) and select *Next*.
13. Enter *Yes* if the individual is currently homeless. If the individual is not homeless, enter the individual's home address.
14. Select the most appropriate answer from the dropdown menu to answer from where the Fiscal Agent/Awardee is accessing the website and select *Next*. **Note:** This answer is mandatory and used for statistical purposes.
15. Select the appropriate answer for the citizenship question and select *Next*. **Note:** This question is used for statistical purposes.
16. Answer the questions in the Disability section according to the participant's self-disclosure.
17. Answer both education questions using the most appropriate answers in the drop-down menus. **Note:** Both questions are mandatory.
18. Answer the Employment Information and Farm Worker Information questions.
19. Answer the Desired Job Title section and select the appropriate title in the dropdown menu.
20. Answer the Ethnic Origin questions and select *Next*.

21. Answer all mandatory military service questions and select *Next*.
22. Answer all Veteran Information questions and select *Next*.
23. Answer all the Public Assistance questions. **Note:** Two additional mandatory questions populate at the bottom of the participant answers No to the first five questions (highlighted box). This section will help determine eligibility for certain program services based on low income.
24. Registration is complete!

Selective Service

Selective Service is not a requirement for CalJOBS registration. However, specific WIOA programs require Selective Service documentation during the Title I application. Keep records of all documentation regarding Selective Service for WIOA programs.

Right to Work Documentation

Right to Work Documents are required for specific WIOA programs, depending on the activity. CWDB encourages all Fiscal Agents/Awardees to have these documents on file if available.

CalJOBS WIOA-Title I Application Process

Once an individual is registered in CalJOBS, program staff can search for and select the individual in the database to continue enrollment. An individual enrolled in a CalJOBS program is considered a participant.

An individual's eligibility (priority population criteria and barrier(s) to employment) will be captured during the Individual Registration and WIOA Title I application.

- *WIOA Title I— Youth*
- *WIOA Title I – Adult*
- *WIOA Title I – Dislocated Worker*

Most participants will use the *WIOA Title I – Youth Application* and *WIOA Title I – Adult Application*. The *Title I – Dislocated Worker Application* is only used for displaced worker participants.

Data collected in the application includes:

- **Program eligibility date(s)** –Adult, Dislocated Worker, Youth, Incumbent Worker
- **Veteran information** –Transitioning service member, general veteran information
- **Employment information** –Unemployment Insurance Status, long-term unemployed
- **Education information** –School status, highest school grade completed
- **Public assistance, barriers, and household income** – Temporary Assistance for Needy Families (TANF), GA, English Language Learner (ELL), etc.
- **Eligibility** –WIOA Special Grants and Non-WIOA Special Grants

Participants over 18 can be enrolled using the *WIOA Title I – Adult Application* and/or *WIOA Title I –Dislocated Worker Application*. If a participant is between 18-24 and needs access to the youth-specific services, they can complete the *WIOA Title I – Youth Application*. The WIOA Title

I application's primary purpose is to link the participant to various programs, avoid service duplication, and ultimately offer the best possible support.

How to Create a WIOA Title I Application

1. Select *Assist New Individual* and search for a registered individual by entering a Social Security Number (SSN) or username.
2. Navigate to the top left of the navigation panel and select the participant's name under the *Currently Managing* tab. **Note:** The system will show a series of folders with links within each folder (Figure 7). The menus may or may not be expanded.
3. Expand the menus as shown in Figure 7.
4. Navigate to *Staff Profiles > Case Management Profile > Programs*. **Note:** After the individual's *Programs Tab* is accessed, it will appear as one of four tabs, all under the Case Management Profile (Figure 8).
5. Scroll down to the Workforce Innovation and Opportunity Act (WIOA) Program section.
6. Select the *Create Workforce Innovation and Opportunity Act (WIOA) Program* link to open a new WIOA application (Figure 9).
7. Enter the application information, such as application date, eligibility information (if the participant is applying for Intensive Services), agency code, and office location in the Start tab. (The WIOA application is a seven-tab process.)
Note: If the site has an Agency Code field, select the *Select Agency Code* link to open a window, search for an agency by complete or partial keyword, and select an agency from the displayed list.
8. Verify information on all tabs and make selections for unanswered questions as some selections from registration do not transfer over.
9. Select the appropriate Grant Code. **Note:** The displayed values result from the previous Customer Program Group selections - if it was for a group related to added grants, the added grants will be found in the drop-down list.
10. The WIOA application is now complete!

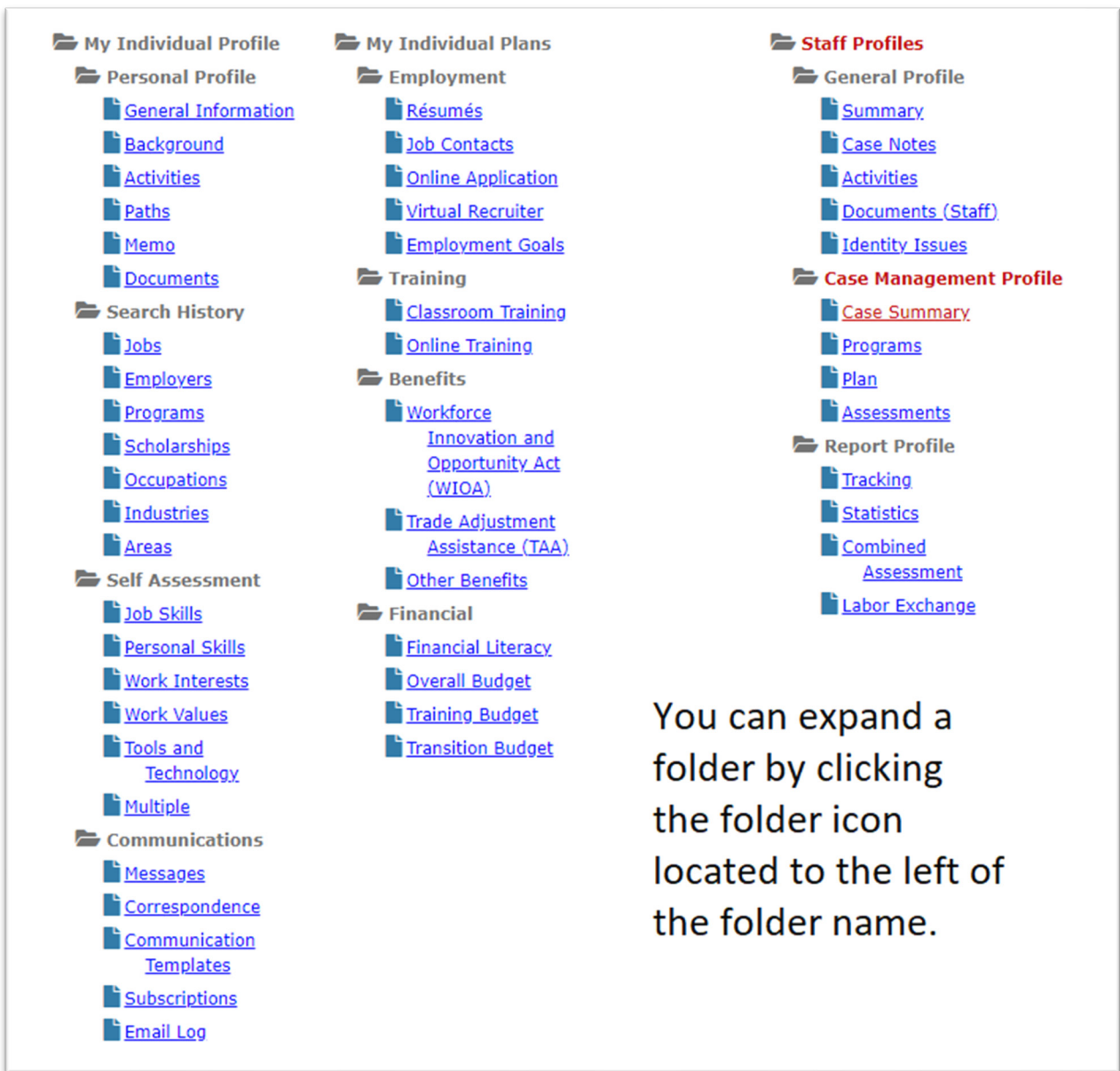


Figure 7 CalJOBS Management Folder

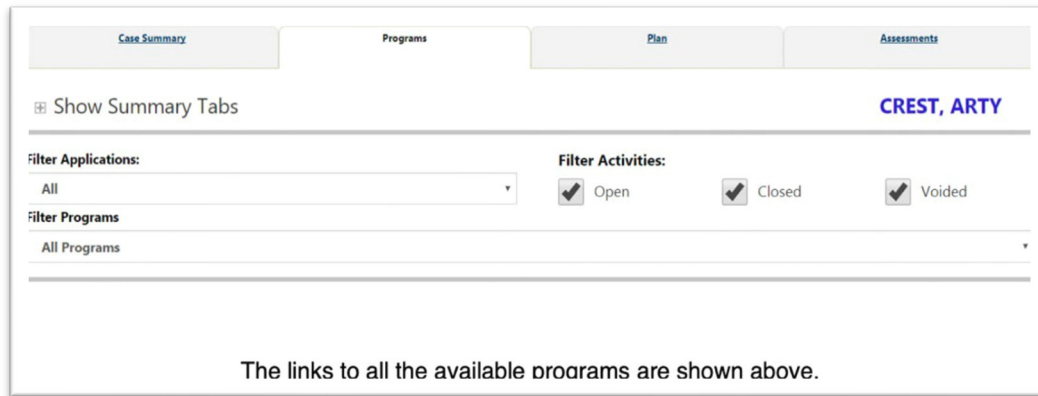


Figure 8 CalJOBS Links to Programs

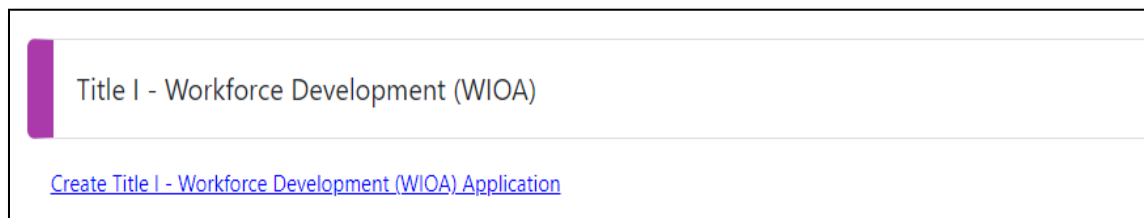


Figure 9 WIOA Application Link

Once staff has selected the individual they will be working with, a Currently Managing section appears at the top left side of their screen. Select *Create Participation* and enroll the individual by adding a participation date and the first Activity Code.

Creating Participation & Enrollment

Enrollment occurs after completing the WIOA Title I application and by creating participation, which occurs by entering (opening and closing) the first Activity Code (associated with a service provided to the participant).

How to Create Participation and Enrollment

1. Click anywhere in the light gray ribbon titled Participation to expand the Participation section (Figure 10).
2. Select the *Create Participation* link in the lower part of the screen, below the word "Participation."

Figure 10 CalJOBS Create Participation

3. Enter the *participation start date* in the corresponding field. **Note:** The start date should be the date the program staff provides the first service to the individual. It cannot be before the Eligibility Date, or a future date.
4. Select *Next* to bring up the Activity Enrollment – General Information page. **Note:** The questions will vary depending on the type of application being completed.

CalJOBS Enrollment Variations

This section provides direction and guidance on elements of the CalJOBS process that vary from WIOA Title I requirements.

Differences exist for the following stages of enrollment:

- Gender
- Incumbent workers
- Citizenship

A participant's eligibility (target population criteria and barrier(s) to employment) will be captured during the Individual Registration, WIOA Title I – Youth, Adult, and/or Dislocated Worker applications processes.

During the Individual Registration process, there are eligibility questions that do not transfer into the WIOA Title I- Youth, Adult, and/or Dislocated Worker Applications. This section identifies these eligibility criteria and provides additional guidance.

Transgender/Gender Nonconforming Individuals

In the WIOA Title I –Youth, Adult, and/or Dislocated Worker Applications, gender is determined only by the selection to the following question during the Individual Registration that reads:

What sex were you assigned at birth, on your original birth certificate? (Figure 11)

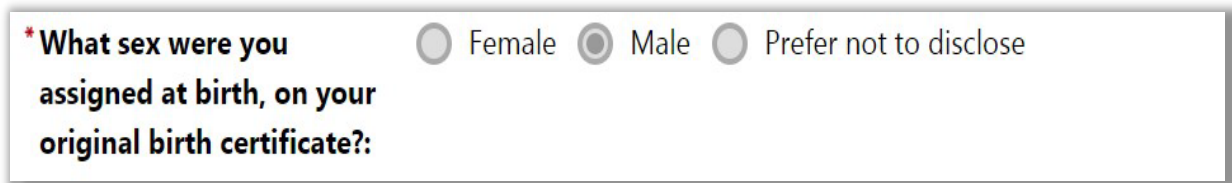
The WIOA Title I – Applications do not take into consideration the selection for the question:

How would you describe yourself? (Figure 12)

Example: If *Male* is selected for the first question and *Woman* is selected for the second question during the Individual Registration process, the WIOA Title I –Application will assume the individual is male. Therefore, metrics regarding women, such as “*Women seeking training or education in nontraditional fields of employment,*” will not populate in the Application. If program staff encounter this situation and need further clarification, contact the CWDB [Research Unit](#).

Program staff must select the option that most accurately applies to the individual for the following questions under the *Demographic Information* section of the Individual Registration process:

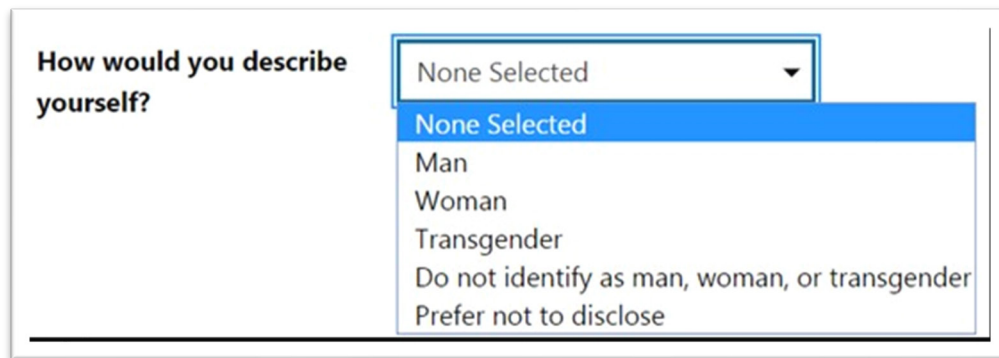
What sex were you assigned at birth, on your original birth certificate? and
How would you describe yourself?



*What sex were you assigned at birth, on your original birth certificate?:

☐ Female ☒ Male ☐ Prefer not to disclose

Figure 11 CalJOBS Participant Demographics Question 1



How would you describe yourself?

None Selected

None Selected

Man

Woman

Transgender

Do not identify as man, woman, or transgender

Prefer not to disclose

Figure 12 Cal JOBS Participant Demographics Question 2

Note: The transgender and gender nonconforming individual eligibility only transfers the selection on the sex assigned at birth question (Figure 11) and does not transfer the selection on how an individual would describe themselves (Figure 12) into the WIOA Title I – Application.

The selection of Question 1 (Figure 11) is linked to other questions during Individual Registration and WIOA Title I – Application. If the choice to that question is *Male*, the CalJOBS system will populate questions specifically for males for the Individual Registration and WIOA Title I –Application.

Incumbent Workers

Incumbent Worker Training (IWT) allows workers and employers to build and maintain a quality workforce and increase participant and employer competitiveness. IWT is a type of work-based training and upskilling designed to ensure California workers can acquire and develop the skills necessary to avert layoffs and increase employee skill levels so they can be promoted within the company and create backfill opportunities for employers (Refer to Directive [WSD19-01](#)).

To qualify as an Incumbent Worker, the employee must meet the following criteria:

- Be a current employee of an eligible employer.
- Be employed by the eligible employer for at least six (6) months. **Note:** If the employee has not been employed by the employer for at least six (6) months, the employee is considered a “new” employee.
- Meet the Fair Labor Standards Act requirements for an employer-employee relationship.

How to Enroll Incumbent Workers

All participants must register using the Title I-Youth, Adult, or Dislocated Worker applications, **not** the Incumbent Worker application. Add *Activity Code 308-IWT for an incumbent worker* to the participant’s application.

Take the following steps to enroll incumbent workers.

1. Select Yes to Incumbent Worker Eligibility on the Eligibility Summary tab of the Title I application.
2. *CalJOBS Activity Code 308 – IWT* should be added to the application and associated with the appropriate funding stream for the duration of the IWT.

Citizenship/Undocumented Individuals

Tracking the services of undocumented individuals in CalJOBS is the same process. To register for a CalJOBS account, an SSN or pseudo SSN must be entered into the system. [WSD20-11](#) provides the current guidance on pseudo SSNs.

A pseudo SSN is issued by the Employment Development Department (EDD) or the Local Area Management Information System (MIS) Administrator under two circumstances:

- At the request of a job seeker
- If a duplicate SSN exists

Participants are not required to provide their SSNs to receive employment or training services, *excluding* Unemployment Insurance (UI).

The Department of Labor (DOL) requires the State to report program performance by matching an SSN to base wage records. The State is encouraged to collect a job seeker’s SSN for reporting

purposes. The (EDD) Field Divisions assign pseudo SSNs with the understanding that pseudo SSNs are excluded from performance, except where supplemental data is available consistent with current DOL policy.

Where to Request a pseudo SSN:

Local Area MIS Administrators and EDD Field Division Supervisors can edit SSNs in the CalJOBS system and create individual registrations with a pseudo SSN. Individuals cannot assign themselves a pseudo SSN during self-registration. For information on assigning participants a pseudo-SSN, please refer to Attachment 3 of [WSIN20-11](#).

How to Assign a pseudo SSN:

Staff will take the following steps to assign a pseudo-SSN.

1. Locate the left navigation pane (see Figures 4 and 5 on Page 8).
2. Select *Manage Individuals*.
3. Select *Create an Individual*.
4. Register the job seeker by completing the registration wizard.
5. Assign a pseudo SSN according to Division or LWIA parameters in Attachments 2 and 3 of [WSIN20-11](#).
6. Select *Next* (located at the bottom of the screen).
7. Verify that the pseudo SSN has populated for the job seeker. **Note:** The job seeker record will state, "Individual has not provided a valid SSN." If this statement does not immediately populate on the screen, finish the job seeker's registration and search for the job seeker using the instructions for updating an SSN.
8. Complete the individual's registration once the pseudo SSN has been verified.
9. Update the individual's case notes stating the reason for assigning a pseudo SSN.

Immigrant Eligibility

The determinations for establishing immigrant eligibility are:

- English Language Learner
- Faces multiple cultural barriers
-

In addition to the questions to determine immigrant eligibility during the CalJOBS Individual Registration, program staff must:

- Answer *Yes* for English Language Learner under the Individual Barriers section and
- Answer *Yes* for Cultural Barriers under the Barriers to Employment section of the *WIOA Title I –Youth, Adult, and/or Dislocated Worker Application* (See Figure 13).

* **English Language Learner:** ☒ Yes ☐ No

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

Figure 13 CalJOBS Participant Demographics- Immigrant Eligibility

English Language Learners

An English language learner is an individual whose primary language is not English. To determine this eligibility, the selection should be *Yes* for the question(s) (Figure 14):

- Do you have limited proficiency in speaking, writing, reading, or understanding English?
or
- Do you have difficulty in speaking, writing, reading, or understanding English?
(located in the Ethnic Origin of the Individual section of the Individual Registration process.)

Language

Do you have limited proficiency in speaking, writing, reading, or understanding English?
or
Do you have difficulty in speaking, writing, reading, or understanding English?

☒ Yes ☐ No

Figure 14 CalJOBS Participant Demographics - English Language Learners

Once *Yes* is selected, additional questions will populate (Figure 15). Participants and/or program staff should make the selections that most accurately describe the participant.

Language

Do you have limited proficiency in speaking, writing, reading, or understanding English?
or
Do you have difficulty in speaking, writing, reading, or understanding English?

☒ Yes ☐ No

* Please select your primary language: None Selected ▼

* How well do you speak that language? None Selected ▼

* Do you require English language assistance? ☐ Yes ☐ No

* How well do you speak English? None Selected ▼

Figure 15 Cal Jobs Participant Demographics -Language

Participants/program staff will then select the participant's primary language for the following question (Figure 16):

* Please select your primary language: Chinese ▼

Figure 16 CalJOBS Participant Demographics - Primary Language

Note: When enrolling in the WIOA Title I –Youth, Adult, and/or Dislocated Worker Application, select Yes for English Language Learner.

Accessing the Grant ID

Once the application is complete, program staff will arrive at the final page with a list of programs in which to enroll the individual (Figure 17). The WIOA Title I programs are at the top of the page.

Workforce Innovation and Opportunity Act (WIOA) Eligibility Information

Applicant Eligibility

Applicant meets the definition for low income: No

Income Table: [Income Table](#)

Program	Eligible	Priority	Calculated Exception/Limitation	Reason(s) Not Eligible	Action
Adult	No			Selective Service is not met. Not Authorized To Work In US	<input type="checkbox"/> Inactive
Dislocated Worker	Undetermined			No DW Eligibility Date.	<input type="checkbox"/> Inactive
Youth	Undetermined			No Youth Eligibility Date.	<input type="checkbox"/> Inactive
VET = Veteran, BSD = Basic Skills Deficient, PA = Public Assistance, LI = Low Income, SLP = Additional Priorities					

Figure 17 CalJOBS Program Eligibility Information

Program staff will scroll down this page to view additional funding streams. When scrolling down, the participant's eligibility status for Non-WIOA Special Grants (state-funded programs) will show as *Not Applicable*. This *does not affect enrollment* into the grant program.

Statewide Adult Eligibility: ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

Applicant does not meet the requirements for Statewide Adult eligibility.

Statewide Dislocated Worker Eligibility: ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

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

Statewide Youth Eligibility: ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

Applicant does not meet the requirements for Statewide Youth eligibility.

Statewide Rapid Response Additional Assistance Eligibility: ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

Applicant does not meet the requirements for Statewide Rapid Response Additional Assistance eligibility.

Non-WIOA Grants

Non-WIOA Special Grants: ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

Local Funded Grants: ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

Figure 18 CalJOBS Program Eligibility Status (bottom of page)

Confirm the eligibility options, including the Adult, Dislocated Worker, and Youth fields, are completed correctly. Once the grant has been added, the screen will appear similar to Figure 19 below. The selected grant appears in a new table with *Remove* listed as an option under the Action column on the far right. Select *Remove* prompt if the Grant ID is incorrect, and select the correct grant. Once the proper grant is selected, select *Finish* at the bottom of the page, and the individual will be enrolled in the program.

Non-WIOA Grants

Non-WIOA Special Grants:
☒ Yes
 ☐ No
 ☐ Not Applicable
 ☐ Inactive

Local Funded Grants:
☐ Yes
 ☐ No
 ☒ Not Applicable
 ☐ Inactive

Grants

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
NonWIOA Special Grant	354	2023 - Prop 39 Cohort 2.0 Adult Participant Only	2023	08/21/2019	Remove
Select from the list of available grants.					
Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
NonWIOA Special Grant	188	HIGH GROWTH & EMERG IND	150		Add
NonWIOA Special Grant	402	AB 2060 3.0 Participants	2045		Add

Current Case Manager:

Case currently Not Assigned to a Case Manager
[Assign Case Manager](#)

[Assign Me](#)
[Remove Case Manager Assignment](#)

Previous Case Manager:

Figure 19 CalJOBS Program Eligibility --Non-WIOA Grants

Co-Enrollment

Co-enrollment occurs when a participant is enrolled in more than one state or federal program. Eligibility questions must be completed for each CWDB-funded program a participant is enrolled in. Further guidance will be provided regarding co-enrollment in state-funded programs where Fiscal Agents/Grantees are not utilizing CalJOBS to report participant data with the rollout of additional data systems (i.e., Cal E-Grants).

Guidance surrounding co-enrollment may change depending on specific circumstances. For example, if an organization is the recipient of two different WIOA-funded grant programs (e.g., WAF and H RTP WIOA) and wants to co-enroll a participant in both programs, in most circumstances, the organization can review the WIOA Title I application to ensure the participant meets eligibility requirements for both grant programs and add these grant codes to the participant WIOA Title I application.

Alternatively, if Organization A is a recipient of the WAF grant program and Organization B is a grant recipient of H RTP WIOA, and both organizations want to enroll a participant, in most circumstances, Organization A and Organization B will *each* need to create WIOA Title I applications for the participant, who will then have two WIOA Title I applications.

The Fiscal Agent/Awardee is responsible for ensuring that all services provided to participants co-enrolled in different programs are *strategically provided and not duplicated*. Strategic co-enrollment requires coordination between all programs the participant is enrolled in to avoid duplication of services and costs. If there is an overlap, each program must identify which services are being provided, where there may be overlap, and where each service fits into the Individual Employment Plan/Service Strategy. With participants co-enrolled in as many programs as possible, program staff have greater flexibility to fund and share the responsibility for the services that help participants meet their goals and objectives while participating in the program(s).

Note: If the participant is co-enrolled in other programs, such as WIOA, the participant *must meet all programs' eligibility criteria*. Many federally funded programs require collecting and record keeping of right-to-work documentation for participants. If there are questions about participant co-enrollment, please contact the [Research Unit](#).

Questions regarding Formerly Incarcerated

To capture which disadvantaged populations might be benefitting from WIOA-funded grant programs, a series of justice-involved related questions have been added to the WIOA Title I application. The questions should be answered if a participant has been involved with the justice system.

Complete the questions shown in Figure 20 if the participant has no current or previous involvement with the justice system.

If formerly incarcerated, what type of facility was the sentence served?	Not Applicable ▼
Justice Involved/Active County Supervision:	Other ▼
Justice Involved/Active County Supervision Other:	N/A
Year released from custody:	0
Total time incarcerated:	0 Years (0-60) 0 Months (0-11)
Total number of offenses:	0

Figure 20 Justice-Involved Questions

Data Verification and Self-Attestation

Fiscal Agents/Awardees are expected to have the proper verification documentation to support the information entered in CalJOBS.

Acceptable forms of income verification documents include but are not limited to:

- Most recent pay stubs
- Tax documents
- Public assistance award letters

If a participant cannot obtain documentation, Self-Attestation forms will be accepted. A Self-Attestation form allows the participant to vouch for the document without the help of a public notary. Usually, it involves confirmation of a particular data element, such as low income.

The key elements included in a Self-Attestation form are:

- The participant's self-identification of their status for permitted elements.
- The participant's signature and date attesting to this self-identification.

Note: Self-Attestation should only be used as a *last resort* when providing documentation is impossible. If participants or program staff have any questions, please contact the CWDB.

Grant ID and CalJOBS Activity Codes

Each grant program has its own unique and specific Grant ID (Code). This Grant ID/Code is attached to the participants' WIOA Title I application and will be used to track activities under the grant program. All participants and activities will be tracked under the appropriate Grant ID/Code assigned to a specific grant program.

Fiscal Agents/Awardees must record all data regarding services provided to participants through the initiative (grant program) by using the CalJOBS system. In CalJOBS, the services provided are referred to as Activity Codes. Activity Codes are three-digit codes associated with each of the specified services.

The eligible activities under WIOA include, but are not limited to:

- Basic skills and adult education
- Earn and learn training
- English language improvement training
- High school diploma and GED acquisition
- Industry certifications
- Mentoring
- On-the-job training
- Basic career services
- Individualized career services
- Other remedial education and work readiness skills
- Pre-apprenticeship programming
- Skills and vocational training (that aligns with regional labor market needs)
- Stipends for trainees
- Supportive services
- Work experience

Allowable activities and use of funds are dependent on what is outlined within each project's budget and approved by the CWDB through the subgrant agreement.

Local Service Provider

As a best practice, add program partners delivering services as Local Service Providers as early as possible. If necessary, program staff can enter activity codes without providing Local Service Provider information by bypassing the tab.

Fiscal Agents/Awardees should include Local Service Provider information for any training or educational Activity Code. If the Fiscal Agent/Awardee is the Local Service Provider, the Research team can assist with registering their organization as a provider and then link or activate their local provider account for easy access. Please contact the CWDB [Research Unit](#) for assistance with linking a local provider account in CalJOBS.

Applying to become a provider in CalJOBS

1. Select the *Not Registered Yet* link directly under the Username and Password log-in fields if the training or educational provider does not already exist in CalJOBS.
2. Choose *Provider* within Option 3 – Create a User Account. Please include a **valid** e-mail address when creating the user account.
3. Enter additional details as directed once the User Account is created. **Note:** If a Local Provider is on the ETPL, once the provider details have been entered, the Local Workforce Development Area's (LWDA) ETPL Coordinator will be automatically notified that the local provider has registered in CalJOBS.
4. CWDB will review the information entered for completeness and accuracy for specific WIOA grant programs and link or activate the Provider application.
5. Receive notification by email once the application is approved.

Adding Activity Codes

1. Select the *Create Activity/Service/Enrollment* link on the Activities/Enrollments/Services ribbon.
2. Select the correct *Customer Program Group*.
3. Select The LWDB Region (your LWDB Region). The Office Location is your office/agency name. Please reference Directive [WSD20-01](#) to locate the correct region. **Note:** Most CBO's regions are considered 'Code 99' WIOA Statewide Grant Contractor.
4. Scroll to Enrollment Information.
5. Select a *Grant* for this activity. **Note:** If a Grant is not selected, the activity code will not appear on the grant program/grant code report.
6. Press *Select Activity Code*, which will generate a pop-up box listing possible Activity Codes.
7. Select the appropriate *Activity Title* (that title will fill into the Activity Code box).
8. Enter an *Actual Begin Date*.
9. Enter the *Projected End Date*. (Depending on the Activity Code, the date can be changed or pushed out if necessary.) **Note:** If an activity code is not closed correctly and there is no activity in CalJOBS for 90 calendar days, the system will "System Close" * and may

result in a Soft Exit. A Soft Exit will exit the participant from the program, even though the participant is still receiving services from the Fiscal Agent/Awardee.

*If services (except post-program/follow-up services) must be provided to an applicant who has been system-exited, the application intake process must be entered and completed again.

10. Create and enter case notes, add comments, and assign a case manager in the Staff Information section.
11. Press *Next* to save information. and move on. **Note:** Once the *Next* button is selected, the Activity Code is created and added to the individual's activity table.

For CalJOBS Activity Codes' duration, refer to the CalJOBS Activity Codes Detailed Listing– Individual of the Directive, [WSD19-06](#).

Order of Activity Codes

Add activity codes associated with the services provided in the following order:

- Initial assessment
- Individual employment plan (IEP)
- Activities/services
- Measurable skill gains
- Credential attainment
- Post-Exit outcomes

Initial Assessment

CalJOBS Activity Code 102 – Initial Assessment is the first activity code to enter. If this activity is provided by program staff and not another organization, the Service Provider tab can be skipped. Program staff should include a case note explaining the type of assessment given and the outcomes of the assessment. Activity Code 102 can be kept open for one day.

Individual Employment Plan (IEP)

The Individual Employment Plan documents a participant's employment objectives, goals, service strategies, and completion status while participating in the grant program.

An IEP is required for each participant and must be completed within 30 days of enrollment.

An IEP allows program staff and the individuals to establish defined goals for employment, training, and skill needs.

IEP provides the ability to:

- Develop a professional plan
- Define a goal
- Obtain employment/training/skills
- Set objectives for the goal
- Review completed services and activities concerning the goal
- Develop employment plans and service strategies

Completed IEP goals can be printed and signed by both program staff and the participant to serve as a type of contract of expectations. The IEP will be reviewed at estimated dates of

completion. The IEP should be reviewed and updated regularly until the participant exits the program.

How to Create an IEP

1. Find the IEP in the Plan link under *Staff Profiles > Case Management Profile*.
2. Locate the Plan tab at the mid-point of the page and select *Create Individual Employment/Plan Service Strategy*. **Note:** An individual can only have **one** IEP open at a time. However, the IEP can be used by Title I and Title III staff to case manage an individual. Multiple goals and objectives may be added to an IEP.
3. Select *Edit* to add, update, or close an IEP.
4. Complete the required Plan Information fields by adding information in *Enter the Plan Start Date*, *LWDB/Region*, and the *Plan Started in office location* tabs. This identifies which office the plan originated from. **Note:** Do not enter information in the Plan Closed Date. Once closed, this action cannot be undone.
5. Select *Add New Goal* beneath the IEP/ISS Goals table. A new form will populate to enter goal information.
6. Add goals to the plan. (Staff can create multiple goals within the IEP.)
7. Select the Type of Goal and Term of Goal (duration) from the dropdown lists.
8. Enter a short Description of Goal in the text box provided. This will be the title of the goal. **Note:** Use the details box below to enter more detailed information.
9. Add goal objectives. (Program staff can create multiple objectives for goals within the IEP.)
10. Enter the Date Established (when the goal is initiated).
11. Enter an objective description in the text box.
12. Leave the Actual Completion Date blank.
13. Select Reason Closed as *None Selected*.
14. Select *Open* for the Completion Status.
15. Type any details or comments in the *Objective Details* text box.
16. Select *Save* to complete the objective.
17. Close IEP. **Note:** Start from right to left by closing the objectives, the goals, and the plan.
18. Enter the second CalJOBS activity, *Activity Code 205 – Development of IEP/ISS/EDP*, after completing the Initial Assessment.
19. Skip the Service Provider table if this activity is provided by program staff and not another organization. **Note:** The duration for Activity Code 205 to be kept open is one day.

Activities/Services

Appendix II includes a link to the CalJOBS Activity Code Dictionary, which includes the federal program definition. Program staff should use the CalJOBS Activity Codes that most accurately and closely correspond to the services rendered. The activity codes associated with services should be entered according to the services rendered. For additional questions about activity codes for your grant, please reach out to the CWDB [Research Unit](#).

Measurable Skill Gain (MSG)

A Measurable Skill Gain (MSG) is a performance indicator that tracks a participant's *interim* progress. An MSG is required for each participant enrolled in an education and/or training program. Program staff can track and report participant progress and performance of participants while in the program. It is intended to capture important education or training progressions in "real time." It is NOT an exit-based performance indicator.

Programs that enroll individuals in education or training programs must specify and document participants' progress (academic, technical, occupational, or other progress toward a credential or employment) in their program.

There are five types of MSGs. Program staff must document the appropriate MSG for the type of education or training program in which the participant is enrolled.

MSG types

- **Educational Functioning Level (EFL)** –Appropriate for participants designated as English language learners or basic skills deficient and who gain at least one EFL as established by a pre-test and post-test.
- **Secondary School Diploma** - Appropriate for participants who do not have a secondary school diploma or its equivalent at program entry.
- **Transcript/Report Card** –Appropriate for participants enrolled in an education program such as high school or community college.
- **Training Milestone** –Appropriate for participants enrolled in on-the-job training (OJT), registered apprenticeships, or work experience.
- **Skills Progression** –Appropriate for participants in an occupational skills training program.

Documenting an MSG

1. Locate the MSG section in CalJOBS. **Note:** The MSG section is under the *Case Management* → *Programs* → *Title 1 – Workforce Development (WIOA)* tab by expanding the menu using the '+' function on the left-hand side.
 2. Expand the Measurable Skills Gain tab and select *Create Measurable Skills Gain*.
 3. Under the General Information section, select the Region and the appropriate organization from the *Office Location* drop-down menu.
 4. In the Skills Attainment Information section, select the appropriate MSG option from the *Skill Type* drop-down menu. The four options are:
 - Post-Secondary Transcript/Report Card
 - Secondary Transcript/Report Card
 - Training Milestone
 - Skills Progression.
- Note:** For more information on MSGs, refer to pages 13-16 of [WSD19-01](#).
5. Enter the *Date Skill Attained* field.
 6. Under Type of Achievement, select the appropriate achievement for the individual.
 7. Select *Verify* to indicate what documentation was used to verify the MSG.

8. Upload documentation in CalJOBS if that is the organization's method of retaining records.
9. Enter a case note to document that the MSG was obtained, and relevant documentation was collected. **Note:** The case note can be entered in conjunction with Activity Code 106—e.g., *Program staff met with participant to collect documentation related to MSGs.*
10. Select *Save*.

Credential Attainment

Program staff are expected to document credential attainment for enrolled participants in education or training programs within the grant term. Credential Attainment is a performance indicator required for participants enrolled in education or training programs.

Participants are expected to obtain the appropriate credential for the education or training program they are enrolled in. **Note:** Participants have up to *one year after the program exit* to receive their credential.

How to Create a Credential

1. Enter credential attainment information in the *Credentials* ribbon.
2. Expand the gray ribbon called Credentials and select the *Create Credentials* link.
3. Select the appropriate *Region*, then choose the organization from the *Office Location* drop-down menu in the General Information section.
4. Select the appropriate credential attainment option from the Credential Received drop-down menu.
5. Verify the credential and upload documentation in the Credential Verification field.
Note: The statement "Copy in Case File" will appear if the Verify link is not utilized.
6. Complete the *Date Credential Received* field.
7. Select the *Search Activities* field. **Note:** Although not marked with a red asterisk, first select the *Associated to Activity* field to associate an activity to the received credential.
8. Select the *Select* link from the Action column for the appropriate activity code, and the information will populate into the Associated to Activity field.
9. Select *Save*.
10. Provide case notes for each activity code entered. **Note:** *Activity Code 106* must be entered when a credential is obtained. An example of an accompanying case note should read: "Program staff met with participant to collect documentation related to obtaining a credential."

Case Notes

Case notes tell the participants' story from entry to exit. **Every activity code entered must have an accompanying case note.** Program staff can insert the case note toward the end when opening an activity code.

The case note should:

- Capture the Activity Code (AC) in the title (e.g., *AC 412 – Objective Assessment*).
- Indicate the Date of Service (not the date the case note is entered).
- Detail the who, what, when, where, why, and how in the case note.
 - Who delivered the service?
 - Who received it?

- What type of service was provided? (e.g., training, workshops, supportive services, etc.)
- When was it provided (date/hours)?
- When will it be completed (duration)?
- Why was it provided?
- How will this benefit the participant?

Additional suggested details for activity types are listed below. (Program staff may provide additional case notes if needed.)

- **Training:** type(s) of training to attend, where (name and location of training), skills/competencies to obtain upon completion, and duration of the training.
- **Education:** name of course, where (name and location), type of certification/degree/diploma to receive upon completion and duration.
- **Referral:** reason for referral and where referred (name and location).
- **Enrollment into Partner Program:** program and agency name.

Example: A case manager enters the Activity Code *301- On-the-Job Training* for a participant with the case note heading of *On-the-Job Training*. The case notes should include the following details:

Participant A starts on-the-job training today (MM/DD/YYYY) at Manufacturing X. Manufacturing X is located at 5555 Parkway, Sacramento, CA 95838. Participant A will learn manufacturing, processing orders, and customer service skills. Participant A will receive 200 hours of OJT and work 20 hours per week. The tentative end date is MM/DD/YYYY.

Example case note for Pre-Apprenticeship Training enrollment:

Title: AC 307: Pre-Apprenticeship Program w/ Occupational Skills Training (ITA)
Date: 10/5/2020
Case Note: John Doe was enrolled into Agency X's Apprenticeship Preparedness Program (APP) on 10/5/20 to obtain an industry-valued certificate/credential to prepare him for entry into the construction trades. APP is a 240-hour (9-week) pre-apprenticeship program that offers a Multi-Craft Core Curriculum, basic math, hands-on learning, field trips, and mentorship, among others. The training will occur Mondays to Thursdays, 9:00 am – 3:30 pm and will be completed by 12/3/20.

Example case note for Supportive Services:

Title: AC 181: Supportive Services: Transportation Assistance
Date: 10/5/2020
Case Note: John Doe was provided ten bus passes on 10/5/2020 for round-trip travel to the Apprenticeship Readiness Program (APP) during the week of 10/5/20 – 10/8/2020. The APP provides pre-apprenticeship training and will help him obtain an industry-valued certificate/credential to prepare him for entry into the construction trades.

Note: Some case notes will not require an Activity Code. For instance, if a case manager checks in with a participant after a job interview, the activity can be documented as a stand-alone case note.

Example case note not associated with an Activity Code:

Title: Check In
Date: 10/9/2020
Case Note: Case Manager called John Doe on 10/9/2020 after his first week at the Apprenticeship Preparedness Program (APP). John shared that he enjoyed learning from the instructors, and the content was valuable. The bus passes have also helped him get to and from training with ease since he has no income. John is looking forward to the field trip to the Local International Brotherhood of Electrical Workers in the following week.

Case Closures, Exits, and Post-Exit Outcomes

When a participant completes the program, has met the employment objectives/goals under the program, and requires no additional services, program staff can determine if a closure is appropriate. A closure is manually entered by staff and ends the participant's presence in the program *but does not exit them* from it. If no open activity code or all activity codes are closed, CalJOBS will soft exit the participant on the 91st day.

How to Create a Case Closure

All activities must be closed before a case closure can be created.

Take the following steps to create a case closure for each participant.

1. Access the participant's case.
2. Expand the Title I application by selecting the box with the plus sign located in the upper left corner of the box (Figure 21).
3. Expand the *Closure* tab.
4. Select *Create Closure*. (Figure 22)
5. Enter the required information request on the form.



Figure 21 Link to a Participant's Completed WIOA Application



Figure 22 Closure Tab for Creating a Case Closure

Employment/placement information when creating a case closure is *mandatory*.

Program Exit/Exit Date

A program exit or exit date is the last service date, not the Exit Clock's last day. The Exit Clock starts on the last date a service is provided. The system automatically generates an exit when there has been a 90-day lapse in service across all programs with no future services scheduled. This is referred to as the *common exit* or *soft exit* and is determined by the last date a participant received Title I services in any program in which they are enrolled.

Ensuring activities recorded in CalJOBS reflect the actual provision of services with accurate start and end dates allows an appropriate exit from program services without issues. If additional services are required after a case closure has been created, the closure shall be deleted, and the 90-day exit clock (if it has not been 90 days) will reset.

Tip: Set reminder alerts in the CalJOBS system to signal that a participant is nearing the 90-day lapse in service. If there is an anticipated break in service that will last longer than 90 days, it is possible to plan a future activity code (e.g., upcoming training) with only a projected start date to ensure a participant is not automatically exited from the program.

An *exclusionary* or *hard exit* occurs when a participant cannot continue in the program due to reasons including but not limited to institutionalization, death, health/medical reasons, etc. Under this exit, a request must be submitted to the [Research Unit](#), which will request the hard exit from EDD. Additional information and/or supporting documentation will be required for EDD to complete the *hard exit/exclusion*. If there are no applicable exit reasons in the options provided, the participant may not qualify for a hard exit.

For participants co-enrolled in other programs via the WIOA Title I application, the date participants stop receiving services funded through a state-funded initiative may not represent an exit if those participants continue receiving services funded through other programs.

Example: A participant is co-enrolled in a WIOA Title I program and a state-funded initiative through the WIOA Title I Application. The participant is not considered officially exited until they have completed both programs. The outcomes that occur past exit will not begin until the completion of *all* programs under the WIOA Title I Application are final.

A *hard exit/exclusionary exit* is allowed under a few circumstances. Program staff should enter a case note justifying the exit and retain any supporting documentation in the participant's hard file if available.

Post-Exit Outcomes

To fulfill the CWDB's statutory reporting requirements, post-exit outcomes will be tracked by utilizing the existing performance monitoring systems and metrics governing relevant programs and outcomes for individuals. The particular outcome data being tracked and analyzed includes:

- Completed Training(s)
- Industry-identified certificate(s) or credential(s)
- Pre-apprenticeship and/or state-registered apprenticeship (occupation and specific apprenticeship program(s) must be tracked at the individual level)
- Post-secondary education enrollment
- Placement and placement retention

For employment/career placement or advancement, a participant's occupation and industry/sector must be tracked individually. Placement retention will be measured six months after apprenticeship, post-secondary education, or employment placement.

Reporting Participant Data to the CWDB

Progress Reports

Progress Reports/Narrative Reports are due quarterly or semi-annually, depending on the grant program. This reporting is separate from the data entered into CalJOBS. Please refer to the Grant Administration Guide for more detailed information on submitting Progress/Narrative Reports. The Progress/Narrative Report should provide details on how the project has progressed, any barriers that have been encountered, lessons learned, etc.

Other reports that fall outside the reporting calendar and outlined in the CalJOBS Reporting section below may be requested as needed by CWDB. Fiscal Agent/Awardee must ensure this data is readily available upon request. CalJOBS reports must be run regularly and proactively to track project movement and ensure the data in the system reflects accurate and up-to-date work for the organization.

- Participant data on CalJOBS should match with data tracked internally. If there is a discrepancy, an explanation must be provided in the Progress Reports/Narrative Report. Explanations should include the discrepancy reason(s), the steps needed to resolve the discrepancy (if applicable), and the projected time to resolve the issue.
- Participant data *not captured* through Activity Codes and/or enrollment process in CalJOBS should be recorded in the supplemental report spreadsheet that will be

emailed. The Fiscal Agent/Awardee can determine the best method to collect the information requested in the supplemental report spreadsheet. The collected data must be corroborated by the Fiscal Agent/Awardee and be adequately documented (e.g., case notes and supplemental report).

Explanation of CalJOBS Reports

Several reports can be generated in CalJOBS after inputting participant data.

Enrolled Individuals Reports

This report provides a list of individuals enrolled in a program. It specifically captures the participant's name (first and last), age, phone, email, address, city, state, country (location), office location, agency code/name, assigned case manager, active date, exit date, prior participation, and military separation.

Predictive – Grant Participants Report

This report captures the following data: participant's name (first and last), age, gender, responsible office, assigned case manager, participation date, grant enrollment date, last grant activity date, project grant activity date, end date, received credential, and entered employment.

It also includes:

- *Grant Funded Services:* Career Services, Education/Training, OJT, Work Experience, Supportive Services, and DWG Disaster Only.
- *Program Co-Enrollment:* WP, AD, DW, RR Add. Assistant, Youth, DWG, IWT, Non-WIOA Grant, Local Grant, TAA, NFJP, Other.
- *Ethnicity/Race:* Hispanic, American Indian/Alaskan Native, Asian, African American/Black, Native Hawaiian, White, Multi-Racial.
- *Other Demographics:* Eligible Veteran, With Disability, Unemployed, Underemployed, Dislocated Worker, Incumbent Worker.
- *Education Level:* No School Level, Secondary School Graduate, 1+ Years of Post-Secondary Education, AS/AA Degree, BS/BA Degree, Beyond BA/BS Degree.
- *Employment Barriers:* Displaced Homemaker, Low Income, Older Individual, Ex-Offender, Homeless/Runaway, Foster Care Youth, Basic Skills Deficiency/English Leader, Exhaust. TANF, Single Parent, Long Term Unemployed.

Services Provided Individuals Report

This report shows specific services provided to the individual by program staff. It can be filtered by a specific service type. The report will display the grant number, grant description, activities provided, activity description, distinct users, and total. (Figure 23)

Sample of Services Provided Individuals Report:

Services Provided Individuals - by Grant					
- Region/Lwia: Alameda County Workforce Development Board - Grant Type: Statewide Adult - Grant: 645 - 1129 - SlingShot - Construction Pre-Apprenticeship Pipeli - Veteran Information From: Both - Date Field: Create Date - Start Date: 6/1/2018 - End Date: 12/31/2019					
Grant Number	Grant Description	Activity	Activity Description	Distinct Users	Total
129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	101	Orientation	7	
129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	133	Job Search Workshop	1	
129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	203	Objective Assessment	17	1
129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	205	Development of IEP/ISS/EDP	10	1
129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	328	Occupational Skills Training (non-ETPL provider, non-formula)	4	
Grant Number	Grant Description	Activity	Activity Description	Distinct Users	Total
				39	4
Total Rows: 5					

Figure 23 Services Provided Report

Other Types of Reports

- *Individual Case Notes* - Pulls case notes entered by staff in an individual's profile.
- *On-Line Characteristics* –Filters by data element associated with WIOA, such as WIOA Application, Participation, Enrollment, Case closure, Case outcome, and follow-up.
- *Credentials Report* – Displays all credential records entered. (The Predictive Report can pull this.)
- *Credentials Required* – This can be a proactive approach to follow-up on credentials that have not been entered or should be entered.
- *Case Closure Reportable Performance Indicator* –Shows performance indicator information: credentials, school status, diploma, and employment placement. These elements are also captured in the Predictive Report.
- *Targeted MSG/MSG Required* – These reports can be a proactive approach to ensure staff collect MSGs that are upcoming or past due.
- *Soon-to-exit to Exit Cases Report/Projected End Dates Report* –Assist with staying ahead of soft exits and system closed activity codes.

This data guidance aims to evaluate the program's effectiveness and outcomes, ensure all data outlined is captured and reported correctly in CalJOBS, and assess the program's effectiveness and outcomes. The Fiscal Agent/Awardee is responsible for ensuring that all participant data is inputted into the CalJOBS system promptly and that the measures captured are accurate to the extent possible. The Fiscal Agent/Awardee is also responsible for keeping the CWDB updated with any difficulties that arise concerning data entry and to request technical assistance in a timely manner. Please use this as a reference guide for inputting data into CalJOBS and what is expected to be captured.

Program staff seeking general information on using CalJOBS should refer to the resources listed in Appendix IV. For non-participant data inquiries, please contact the grant-specific general inbox that can be found in the Grant Administration Guide.

Appendix I. Personal Information Notice

Effective Date: 9/12/2023

The California Workforce Development Board (CWDB) administers its programs as authorized by current legislation. It collects Personal Information (as defined in CWDB's [Privacy Policy](#)), including name, social security number, birth date, and address.

Providing this information is mandatory. The CWDB cannot effectively complete program evaluation and participant eligibility without it.

The CWDB collects Personal Information for:

- Program Evaluation
- Participant Eligibility

Any organization that submits Personal Information to CWDB or its service providers represents and warrants that:

- It has the authority to disclose the information and use the information in accordance with this Notice of Collection and
- The information provided is accurate.

Appendix II. Activity Codes

Appendix II provides definitions for eligible activities in CalJOBS and includes information on entering data on services provided under the initiative (grant program) into the CalJOBS system. The tables in this section should be used as a general guide for Fiscal Agents/Awardees. Fiscal Agents/Awardees should prioritize the activity codes below and select the code that most accurately corresponds to the services rendered. If a service is not listed below, please find the most appropriate activity code in the Directive, [WSD19-06](#) (complete list of CalJOBS Activity Codes). For guidance in selecting an activity code, contact the [Research Unit](#) for assistance.

Refer to CalJOBS Activity Codes Detailed Listing-Individual (Attachment 2) of [WSD19-06](#) to view the duration (in days) for which the activity code can be kept open.

Program staff are required to enter participant information into the CalJOBS system. Managers, staff, and Management Information System (MIS) administrators can change active participant data within 30 days.

After 30 calendar days, the CalJOBS system does not allow specific areas of the participant record to be changed or updated. When this occurs, a Data Change Request form must be completed to enable the participant data to be changed or updated. Its purpose is to correct data key entry errors and other circumstances beyond program staff's control. For more information on the data change request procedure, refer to the Directive [WSD18-02](#). For further assistance, please contact the CWDB [Research Unit](#).

The code definitions will reference terms that are used in WIOA programs. Some code definitions refer to the Employment Training Provider List (ETPL). For more information about ETPL, refer to the Directive [WSD15-07](#).

When entering an Activity Code for a participant enrolling in industry certification, program staff should be familiar with and follow the guidelines outlined in the Directive [WSD19-03](#).

For a full list of activity codes and their definitions, please review the [Activity Code Dictionary](#) available through EDD. The eligible activities under most initiatives include, but are not limited to:

- Basic skills and adult education
- Earn and learn training
- English language improvement training
- High school diploma and GED acquisition
- Industry certifications
- Mentoring
- On-the-job training
- Basic Career Services
- Individualized Career Services
- Other remedial education and work readiness skills

- Pre-apprenticeship programming
- Skills and vocational training that aligns with regional labor market needs
- Stipends for trainees
- Supportive services
- Work experience

Appendix III. Data Change Requests

Submitting a Data Change Request (DCR)

If data needs to be added or changed after 30 days of providing a service, the Fiscal Agent/Awardee must notify the CWDB's [Research Unit](#) by email before initiating the DCR process. The Fiscal Agent/Awardee is responsible for keeping the CWDB apprised of all submitted DCR outcomes of the request(s). DCRs submitted after the grant term end date will not be accepted.

Once the appropriate forms are completed, the Fiscal Agent/Awardee will submit them to the Central Office Workforce Services Division (COWSD), [Program Reporting and Analysis Unit](#) (PRAU)

Note: The [Research Unit](#) inbox must be copied with the original correspondence and will retain all email correspondence regarding DCR until the process is finalized.

Email initiating the DCR should include "CWDB Program-Fiscal Agent/Awardee-Data Change Request" in the subject line.

Step 1: Access the DCR Form

The directive with downloadable DCR forms can be found on the last page of Directive [WSD18-02](#). CWDB's Fiscal Agents/Awardees will use Attachments 1 and 3.

Step 2: Complete the "Data Change Request" Form

The DCR form comprises the following three sections:

Section I: Requestor's Identifying Information

This section requests general contact information items. This information is required even if the Management Information System (MIS) Administrator and requestor are the same individual.

I. Requestor Identifying Information Section	
DATE OF REQUEST:	_____
SUBRECIPIENT:	<u>Name of Organization</u>
MIS ADMINISTRATOR:	<u>Name of Administrator/Name of Requestor</u>
REQUESTOR:	<u>Individual Requesting Data Correction in CalJOBS</u>
REQUESTOR'S EMAIL ADDRESS:	_____
REQUESTOR'S PHONE NUMBER:	_____

Figure 24 Section I of DCR Form

Section II: Detailed Reason for Requested Correction Section

This section solicits the details necessary to complete the request:

CHOOSE AN ITEM

- Choose only one item from the drop down ----->
- Provide detailed reason as to why data needs to be corrected
- If there are more than one participant data that has to be corrected, please do not choose the same item selected already from the drop down. You only need to choose one item from the drop down and include a brief detailed reason for all data change requests.

WHAT NEEDS TO BE CORRECTED

Edit - Enrollment Dates

CHOOSE AN ITEM

Add - Activity Code(s) Status
Add - Application and/or Participation
Delete - Enrollment(s)
Delete - Outcome(s)
Delete - Special Grant Tracking
Edit - 30-Day Lockdown
Edit - Application Barriers
Edit - Application & Eligibility Dates
Edit - Completion Status
Edit - Credential
Edit - Enrollment Dates
Edit - Measureable Skills Gain(s)
Edit - Special Grant
Edit - Voided Enrollments
Reset - Follow-up
Other

Figure 25 Section II of DCR Form

Make the appropriate selection from the *CHOOSE AN ITEM* drop-down menu of what issue requires correction. If multiple changes are required for one participant, select one change from the drop-down menu and list all the changes in the details section.

Include the participant's name, program name, application number, and policy and procedure that staff will follow to avoid similar errors from reoccurring.

Note: A participant's complete social security number should never be included.

Section III: Authorized Signature Section

The Requestor, MIS Administrator, and Executive Director all need to sign the document. If there is no MIS Administrator, the Requestor should also sign in that field. Any request that doesn't have all three authorized signatures will be denied.

III. Authorized Signature Section	
AUTHORIZED SIGNATURE OF REQUESTOR	DATE:
Signature of Administrator or Requestor	
AUTHORIZED SIGNATURE OF MIS ADMINISTRATOR	DATE:
Signature of Administrator or Requestor	
AUTHORIZED SIGNATURE OF EXECUTIVE DIRECTOR	DATE:
(OR PROGRAM DESIGNEE) Signature of Executive Director or Program Designee	

Figure 26 Section III of the DCR Form

Requests for more than three data changes must be listed on the DCR Supplemental Spreadsheet. The spreadsheet must include, at minimum, the program name, application number or State ID, participant's first and last names, and an explanation of what needs to be corrected.

The spreadsheet must include the application number, program name, state ID, participant's last and first names, grant code (if applicable), activity code (if applicable), incorrect dates, correct dates, and comment/instructions (an explanation of what needs to be corrected).

A blank, downloadable DCR Supplemental Spreadsheet is available here: [Data Change Request Supplemental Spreadsheet](#)

Figure 27 Blank Supplemental Spreadsheet

Accompanying Spreadsheet for the DCR Form											Attachment 2
Application #	Program Name	State ID	Last Name	First Name	Grant Code (if applic.)	Activity Code	Incorrect Actual Begin Date	Correct Actual Begin Date	Incorrect Actual End Date	Correct Actual End Date	Comments / Instructions
XXXXXX	Title I - WIOA	00000	Last Name	First Name	XXXX		3/15/2021	Void		Void	Void WIOA application for participant. This individual didn't qualify for (Grant Program) as she did not meet the target population eligibility.This participant wasn't enrolled in (Grant Program), and the stipends will not be paid using (Grant Program) funds.
XXXXXX	Title I - WIOA	00000	Last Name	First Name	XXXX		8/11/2021	7/1/2021		Open	Wioa application date and adult eligibility date should both be 7/1/21.
XXXXXX	Title I - WIOA	00000	Last Name	First Name	XXXX			4/26/2021			"Cultural Barries" Should be "Yes" in Barriers.AND "English Language Learner" should be "Yes" in Barriers.
XXXXXX	Title I - WIOA	00000	Last Name	First Name	XXXX	102	8/11/2021	7/1/2021	8/11/2021	7/1/2021	102 start and end date should be 7/1/2021. (Grant Program) participation date should also be 7/1/2021
XXXXXX	Title I - WIOA	00000	Last Name	First Name	XXXX	328	8/11/2021	7/9/2021	8/11/2021	7/9/2021	Please change the dates for the activity codes. Incorrect start and end date. Training start date and end date should be 7/9/2021
XXXXXX	Title I - WIOA	00000	Last Name	First Name	XXXX	183	8/11/2021	7/23/2021	8/11/2021	7/23/2021	Please change the dates for the activity codes. Incorrect start and end date. Activity start date and end date should be 7/23/2021
XXXXXX	Title I - WIOA	00000	Last Name	First Name	XXXX	328	3/13/2021	3/8/2021	3/13/2021	4/16/2021	Please change the dates for the activity codes. Incorrect start and end date.

Figure 28 Sample Completed Supplemental Spreadsheet

Note: Color coding based on the type of change (Figure 28) is not required but recommended.

Approval Consideration Process

The following guidance is provided directly by EDD's Program Reporting and Analysis Unit (PRAU) regarding the DCR approval process.

Reference [EDD's Data Change Request Procedure](#) for more details.

Any requests associated with data beyond 90 days may not be approved and will be thoroughly reviewed. Upon receipt of a fully completed DCR form, the PRAU will review the request and analyze the overall impact of the proposed change. Each request will be considered case-by-case, contingent upon the detailed reasons listed and the supporting documentation provided.

If additional information is required, PRAU will email the Fiscal Agent/Awardee for clarification. The Fiscal Agent/Awardee must reply to the PRAU message within *seven (7)* calendar days, or the request may be denied. All replies must include the entire email string and all attachments throughout the DCR processing.

If the DCR is approved, PRAU will make the requested changes, respond to the Fiscal Agent/Award, and provide reason(s) for the denial. The Fiscal Agent/Awardee is responsible for verifying that the changes made by PRAU are accurate.

If the DCR is denied, PRAU will notify the Fiscal Agent/Awardee and explain the reason(s) for the denial. In addition to the denial notification notice obtained by PRAU, the CWDB's PRL team must formally advise that denied DCRs be kept on file by the Fiscal Agent/Awardee as data omitted from the system will still be considered for program evaluation purposes and will be required in the event of monitoring.

MIS Administrators

- Only Local Areas have designated MIS staff who are granted “administrative” level privileges to manage specific CalJOBS data and system functions. These entities generally can resolve data entry issues independently. Any DCR submissions should be promptly communicated to the CWDB to ensure any data discrepancies are addressed, and guidance for proper data capture is obtained
- Community Based Organizations (CBOs) do not have MIS administrators. Some limitations exist in adjusting data that has been entered. If a Fiscal Agent/Awardee is a CBO experiencing data entry difficulties, they must immediately contact the CWDB Research Unit for assistance.

After 30 calendar days, the CalJOBS system will not allow any Program staff to change or update certain areas of the participant record. The Data Change Request (DCR) form is a tool to enable the participant data to be changed or updated and accurately reflect project outcomes. Its purpose is to correct data key entry errors and other circumstances beyond the staff’s control.

CWDB’s general rule for all Programs utilizing the State’s workforce management system: *“If it is not in CalJOBS, it doesn’t exist.”*

All data capture inquiries, including DCRs, must be directed to the CWDB’s Research team via the [Research Unit](#) inbox.

System Closed vs. Soft Exits

System Closed

Program staff must ensure records are updated in real-time to the extent feasible *or* within 30 calendar days of providing a service to avoid a *System Closed* completion status. Once the activity becomes *System Closed*, the data cannot be changed or updated.

The CalJOBS system closes an activity if an Actual Begin Date has not been entered and more than 30 days have passed. To prevent the system from closing an activity, the actual beginning date must be entered before 30 days elapse.

The CalJOBS system will close an activity if the Projected End Date expires and more than 30 days elapse. The Projected End Date must be extended before 30 days elapse to prevent the system from closing an activity.

Closing an activity in either circumstance will result in a System closed notice.

Soft Exit

A participant’s application is considered a Soft Exit after 90 calendar days of inactivity across all programs within CalJOBS, and when no new activity has been scheduled for the participant in CalJOBS. If services (except post-program/follow-up services) need to be provided to an applicant who has been system exited, the application intake process must be completed again.

A DCR is unavailable for re-enrollment when a soft exit has occurred.

Common Uses for Data Change Request

- Entering actual participant enrollment dates
- Entering accidentally omitted service/activity codes
- Requesting re-opening of System Closed activity codes
- Deleting data accidentally entered into the system

Data Change Request Cut-Off/Timeline

Before the end of the grant term, Fiscal Agents/Awardees should evaluate their projects to determine if DCRs need to be submitted for consideration. To ensure seamless and efficient processing, *all DCR requests must be submitted 60 days before the grant term's end date.*

DCR requests submitted outside the listed timeframe or outside of the Program's grant term will not be accepted by the CWDB.

Notes and Best Practices

- Send the completed DCR and spreadsheet, if applicable, to the CWDB for review before sending to EDD.
- Once reviewed by the CWDB Research Team, send the completed DCR to.
- Detailed guidance on completing the DCR is located in the Data Change Request Form Directive [WSD18-02](#).
 - Requestor should review the directive to ensure proper completion of the DCR.
- For any additional questions, please contact the CWDB [Research Team](#).

Appendix IV. References and Additional CalJOBS Resources

Statute and Report

- [Assembly Bill 1550](#)

WIOA and Directives

- [WIOA \(Public Law 113-128\)](#)
- [WIOA Eligible Training Provider List - Policy and Procedures WSD15-07](#)
- CalJOBS Activity Codes, [WSD19-06](#)
- Data Change Request Form Procedure, [WSD18-02](#)
- Employment Training Provider List, [WSD21-03](#)
- Performance Guidance, [WSD22-01](#)
- Pseudo SSN, [WSD20-11](#)
- Regional Planning Units, [WSD20-01](#)

CalJOBS

- [CalJOBS Homepage](#)
- [EDD CalJOBS General Information](#)