

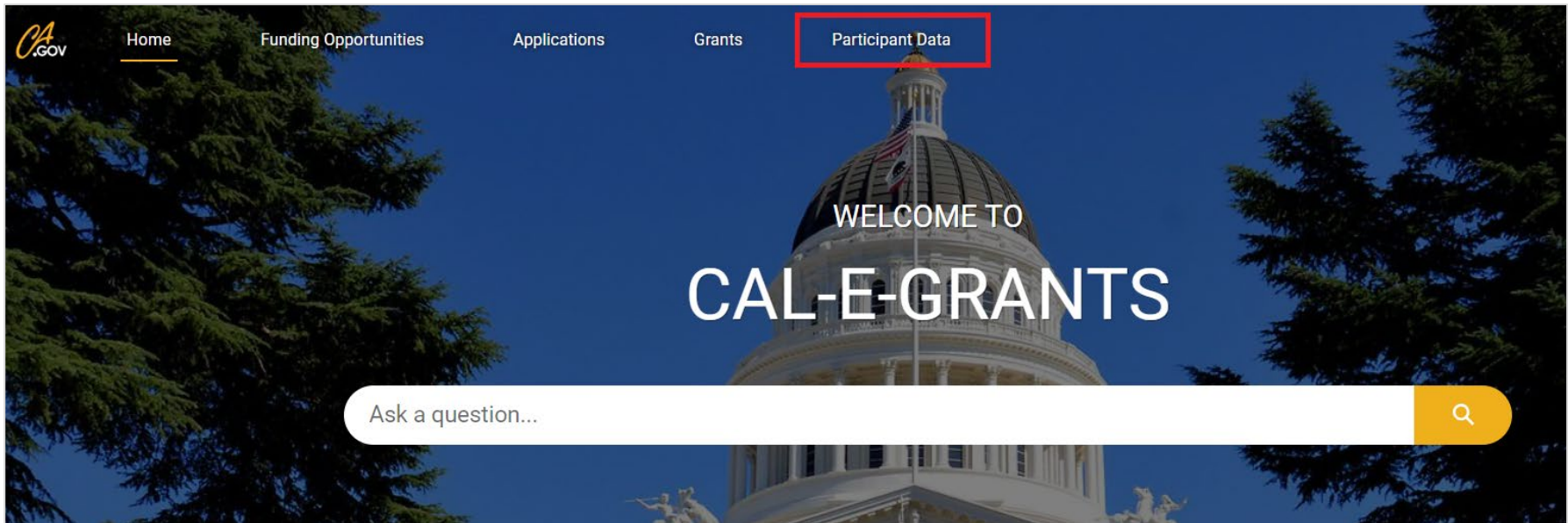
CAL-E-GRANTS Reference Guide: PARTICIPANT DATA – MANUAL PROCESS

Once logged in, new Participant Data can be added manually or uploaded. Follow the steps below to input data manually.

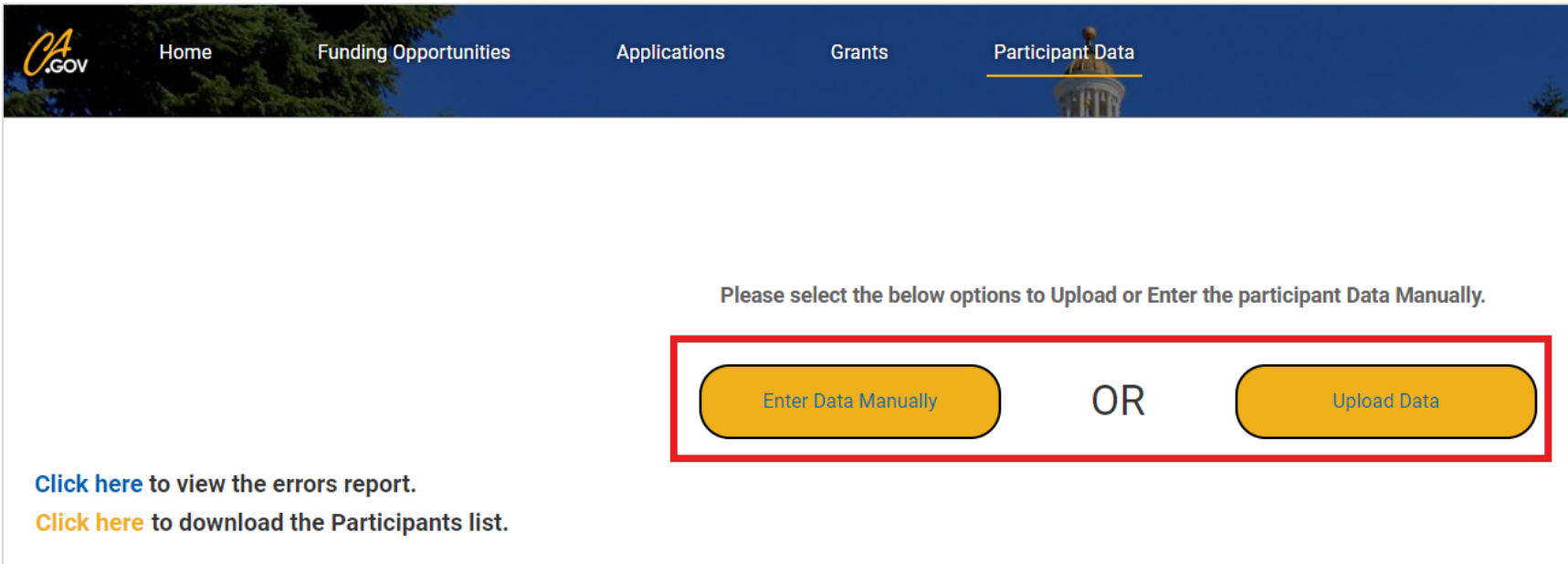
ACCESSING PARTICIPANT DATA: MANUAL ENTRY

Access via Participant Data Tab

1. From the Cal-E-Grants landing page, select the **Participant Data** tab at the top.



Please Note: 'Enter Data Manually' and 'Upload Data' buttons are located near the top of the page.



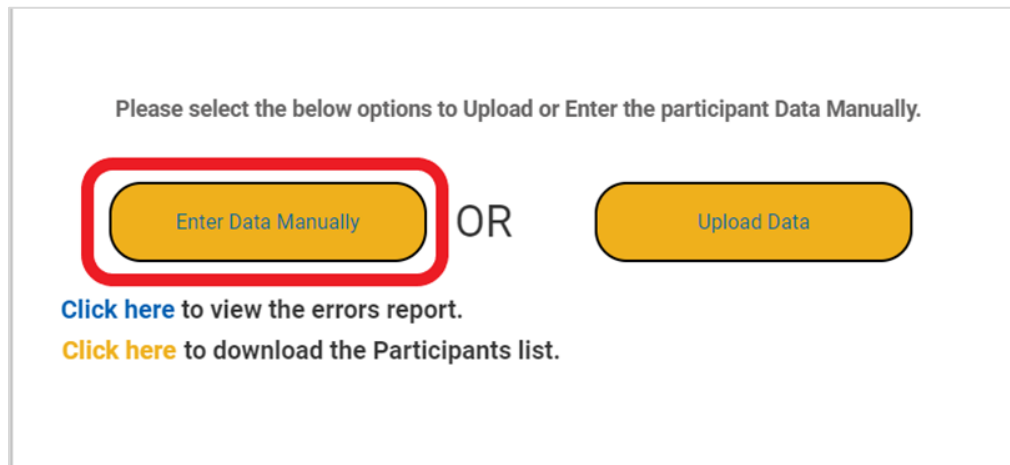
The screenshot shows the top navigation bar of the CA.GOV website. The navigation items are: Home, Funding Opportunities, Applications, Grants, and Participant Data (which is underlined). Below the navigation bar, the main content area contains the following text and buttons:

Please select the below options to Upload or Enter the participant Data Manually.

[Enter Data Manually](#) OR [Upload Data](#)

[Click here](#) to view the errors report.
[Click here](#) to download the Participants list.

2. Select the 'Enter Data Manually' option.



This is a close-up of the button selection area from the previous screenshot. The text and buttons are:

Please select the below options to Upload or Enter the participant Data Manually.


[Enter Data Manually](#) OR [Upload Data](#)

[Click here](#) to view the errors report.
[Click here](#) to download the Participants list.

The 'Enter Data Manually' button is highlighted with a red rounded rectangle, indicating it is the selected option.


3. The **Enter Data Manually** form will appear. Fill in the required fields indicated with a red asterisk (*).


Enter Data Manually

* Grant
 

* First Name

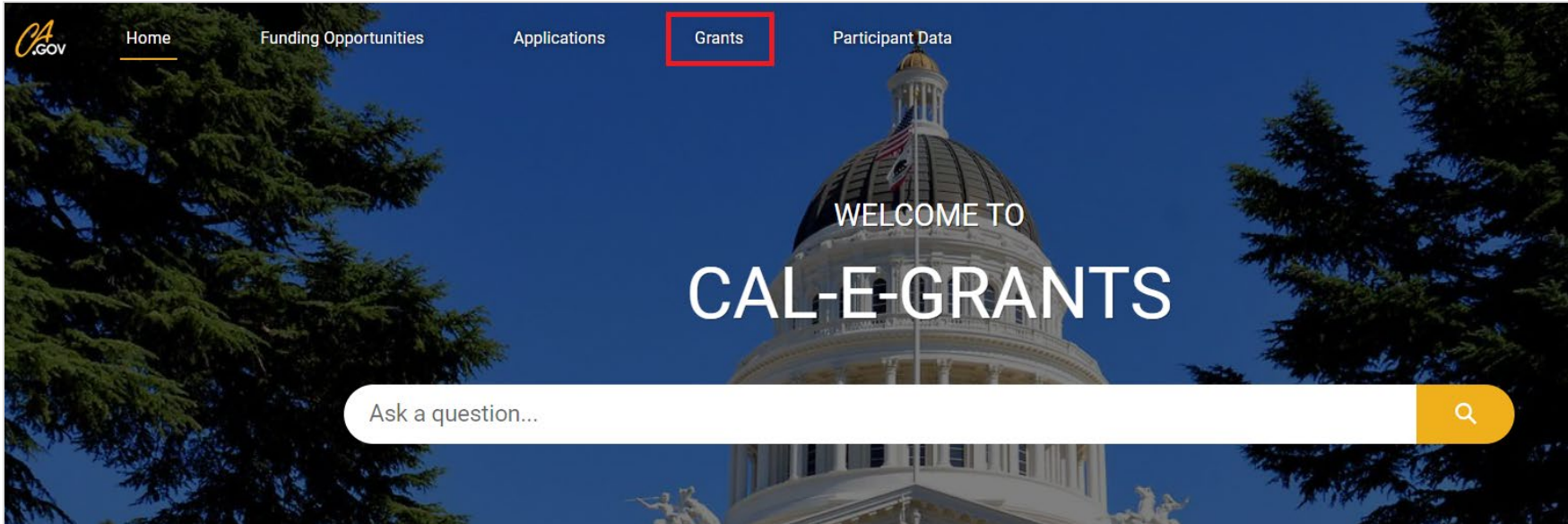
* Last Name

* Date of Birth
 

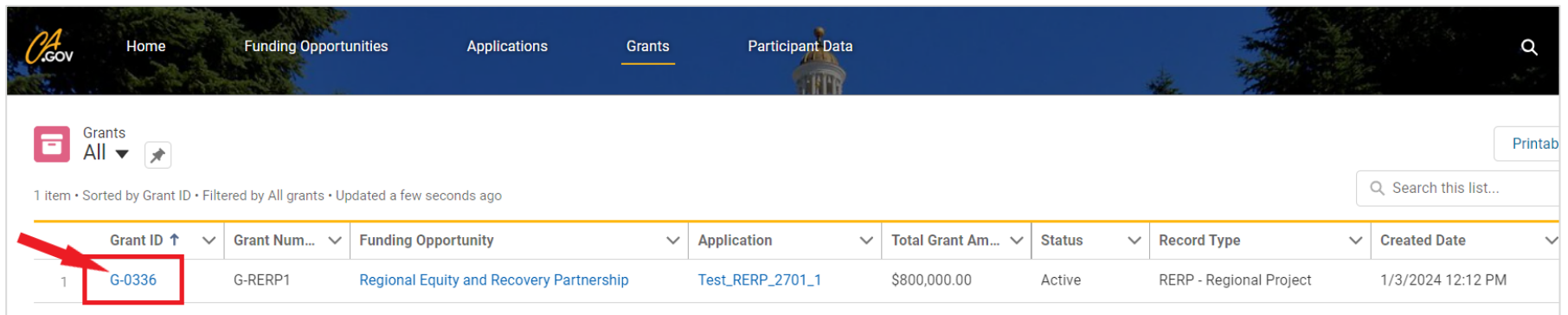
* Do you have SSN?
 

Access via Grants Tab

1. From the Cal-E-Grants landing page, select the **Grants** tab at the top.



2. Select the Grant ID **link** under the 'Grant ID' tab.



The screenshot shows the Grants tab in the Cal-E-Grants system. The navigation bar is the same as in the previous image. Below the navigation bar, there is a section for Grants with a search bar and a "Printable" button. The main content area displays a table with the following columns: Grant ID, Grant Num..., Funding Opportunity, Application, Total Grant Am..., Status, Record Type, and Created Date. The first row of the table has the following values: 1, G-0336, G-RERP1, Regional Equity and Recovery Partnership, Test_RERP_2701_1, \$800,000.00, Active, RERP - Regional Project, and 1/3/2024 12:12 PM. A red arrow points to the "G-0336" link in the "Grant ID" column.

Grant ID	Grant Num...	Funding Opportunity	Application	Total Grant Am...	Status	Record Type	Created Date	
1	G-0336	G-RERP1	Regional Equity and Recovery Partnership	Test_RERP_2701_1	\$800,000.00	Active	RERP - Regional Project	1/3/2024 12:12 PM

3. On the top right-hand side of the Grant page, select the drop-down arrow, then select 'New Participant Data.'

The screenshot shows the top section of a grant page for Grant G-0336. On the right side, there is a navigation bar with buttons for '+ Follow', 'Activate Grant', 'New Modification Request', and 'New Invoices'. A red arrow points to a dropdown arrow next to 'New Invoices'. The dropdown menu is open, showing 'New Report' and 'New Participant Data', with the latter highlighted by a red circle. Below this, a table displays grant details: Grant Name (Test_RERP_2701_1), Project Period (1/1/2023 - 12/31/2025), Total Grant Amount (\$800,000.00), Adjusted Grant Amount (\$800,000.00), and Total Invoiced Amount. A progress bar below the table shows the grant is in the 'Active' phase. At the bottom, a navigation menu includes 'Details', 'Budget Allocation', 'Modification Requests', 'Invoices', 'Progress Reports', 'Documents', and 'Participant Data'.

4. A pop-up will appear. Select the 'Enter Data Manually' button.

The screenshot shows a pop-up dialog box with the following content: 'Please select the below options to Upload or Enter the participant Data Manually.' Below this text are two yellow buttons: 'Enter Data Manually' and 'Upload Data'. The 'Enter Data Manually' button is circled in red. The word 'OR' is placed between the two buttons. Below the buttons, there are two links: 'Click here to view the errors report.' and 'Click here to download the Participants list.'

5. An **Enter Data Manually** form will appear. Fill in all the required fields.

Enter Data Manually

* Grant

* First Name

MANUAL ENTRY OF PARTICIPANT DATA

1. Fill in the required fields indicated with a red asterisk (*) on the Enter Data Manually form. Select 'Save' to submit.

Enter Data Manually

* Grant
G-0336

* First Name
John

* Last Name
Doe

* Date of Birth
Jul 27, 1978

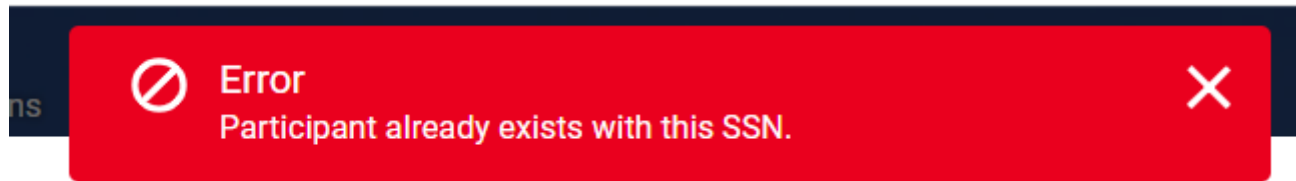
* Do you have SSN?
Yes

* Social Security Number
112233445

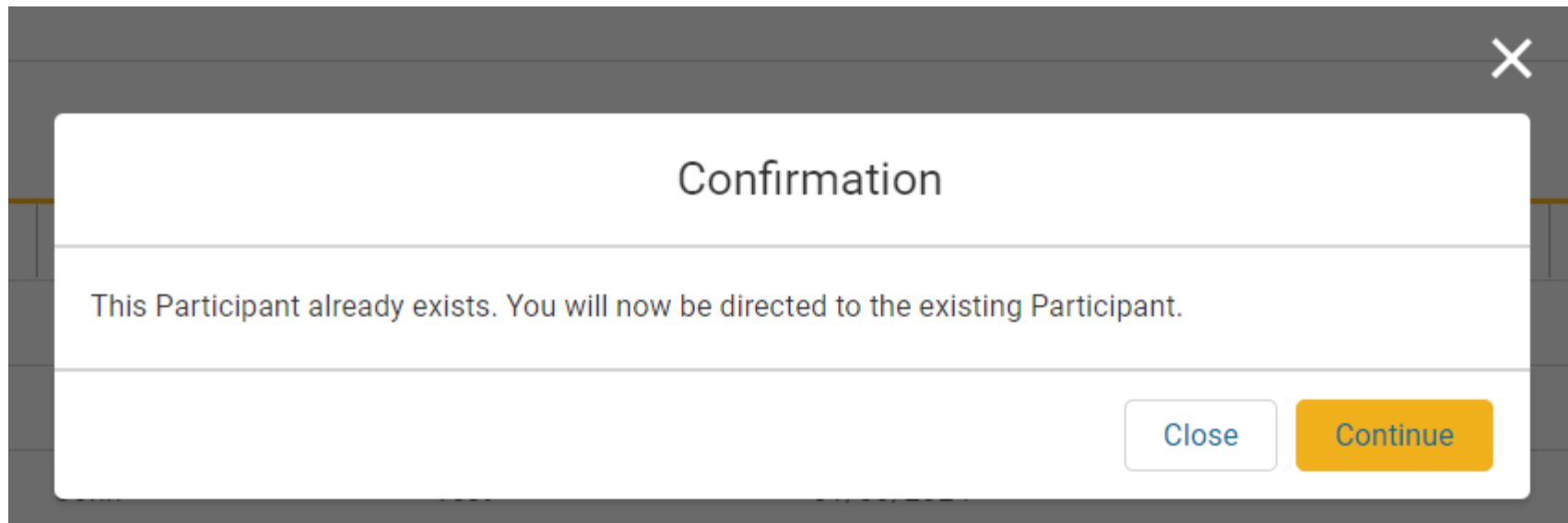
Close Save

*Note: If 'YES' is answered for "Do you have SSN?" the required **Social Security Number** field will appear.*

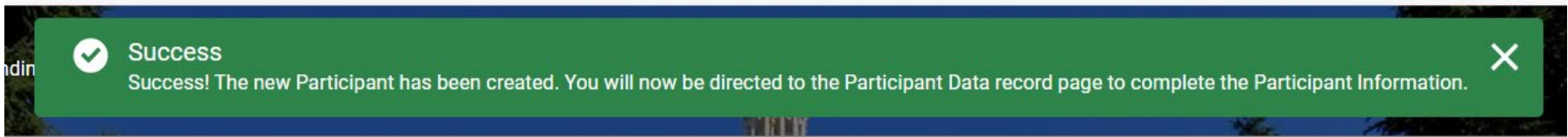
2. Three potential scenarios can occur once the 'Save' button is selected:



a) *If the SSN matches an existing participant, an error message will appear at the top of the screen. Confirm the Participant's SSN is correct.*



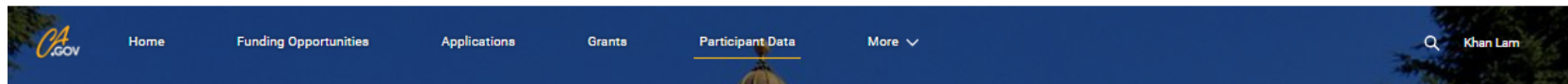
b) *If the participant record matches one already in the system (name, social, and date of birth ALL match), a pop-up will appear, and the system will go to the existing participant.*



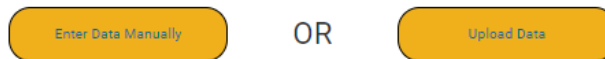
- c) If the system accepts the data, a success banner will appear, then users will be redirected to the new **Participant Data** page for the participant.

VIEWING THE PARTICIPANT DATA DETAIL PAGE

- 1. There is a search bar at the top right-hand side of the **Participant Data** table. This can be used to locate previously entered participant data.



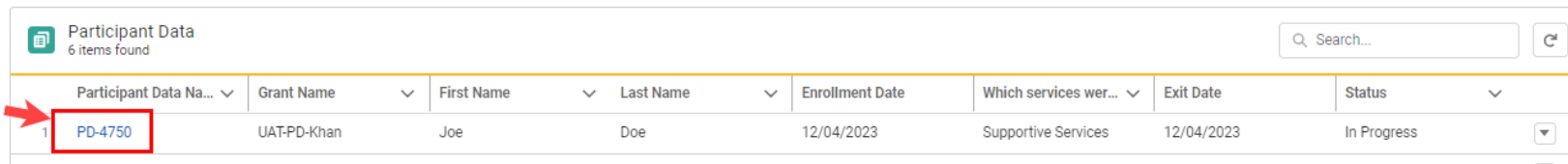
Please select the below options to Upload or Enter the participant Data Manually.



[Click here](#) to view the errors report.
[Click here](#) to download the Participants list.

Participant Data							
0 items found							
Participant Data Name	Grant Name	First Name	Last Name	Enrollment Date	Which services were pr...	Exit Date	Search
							<input type="text" value="Search..."/>

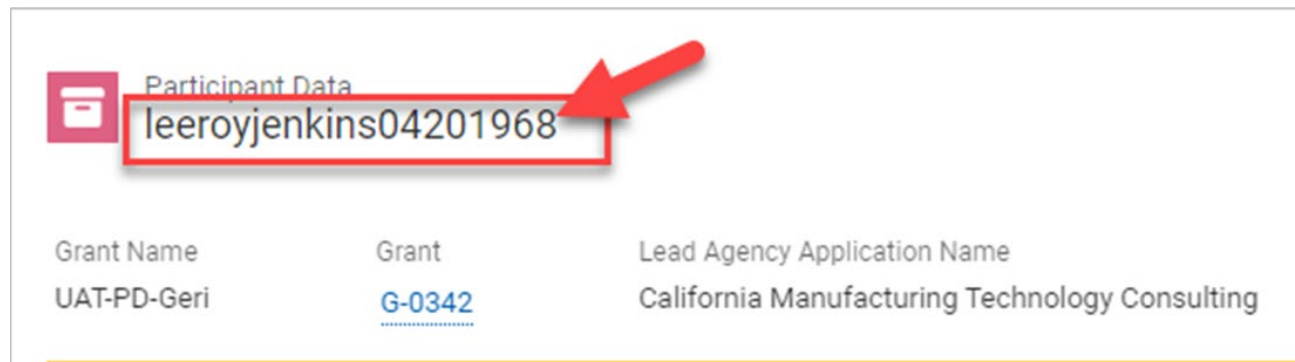
2. Select the **Participant Data Name** to open the entry.



Participant Data Na...	Grant Name	First Name	Last Name	Enrollment Date	Which services wer...	Exit Date	Status
1 PD-4750	UAT-PD-Khan	Joe	Doe	12/04/2023	Supportive Services	12/04/2023	In Progress

3. From the **Participant Data** page, the **Participant ID** can be found at the top of the page.

Please Note: The Participant ID is required to upload data on each subsequent tab following 'Participant Information.'



Participant Data

leeroyjenkins04201968

Grant Name: UAT-PD-Geri Grant: G-0342 Lead Agency Application Name: California Manufacturing Technology Consulting

The naming convention will follow the format:

First Name + Last Name + Date of Birth (MMDDYYYY), e.g., Leeroy Jenkins 04/20/1968 = LeeroyJenkins04201968

4. Scroll down to the editable fields. Input all necessary fields (*) for the participant.

Participant Information

First Name: Joe

Last Name: Doe

Date Of Birth: 12/4/2020

Social Security Number: ***-**-7777

Middle Name: [Empty]

* Address Line 1: [Empty]

Address Line 2: [Empty]

* City: [Empty]

* State: CA

* Zip Code: [Empty]

* Gender: --None--

* Transgender / Gender Nonconforming: --None--

* Sexual Orientation: --None--

* Select Race / Ethnicity

Available	Chosen
American Indian / Alaska Native	
Asian	
Black / African American	
Hispanic / Latinx	

Buttons: Cancel, Submit Updates, Final Submission

5. Hover over the help circles with an 'i' to get more details on the requested information.

* City ⓘ

* Zip Code ⓘ

* Transgender / Gender Nonconforming ⓘ

Whether or not the Participant identifies as transgender.

--None--

6. For the **Race/Ethnicity** field, to make a selection, highlight the selection from the 'Available' list, then select the forward arrow to move it over to the 'Chosen' picklist box.

* Select Race / Ethnicity ⓘ

Available

American Indian / Alaska Native

Asian

Black / African American

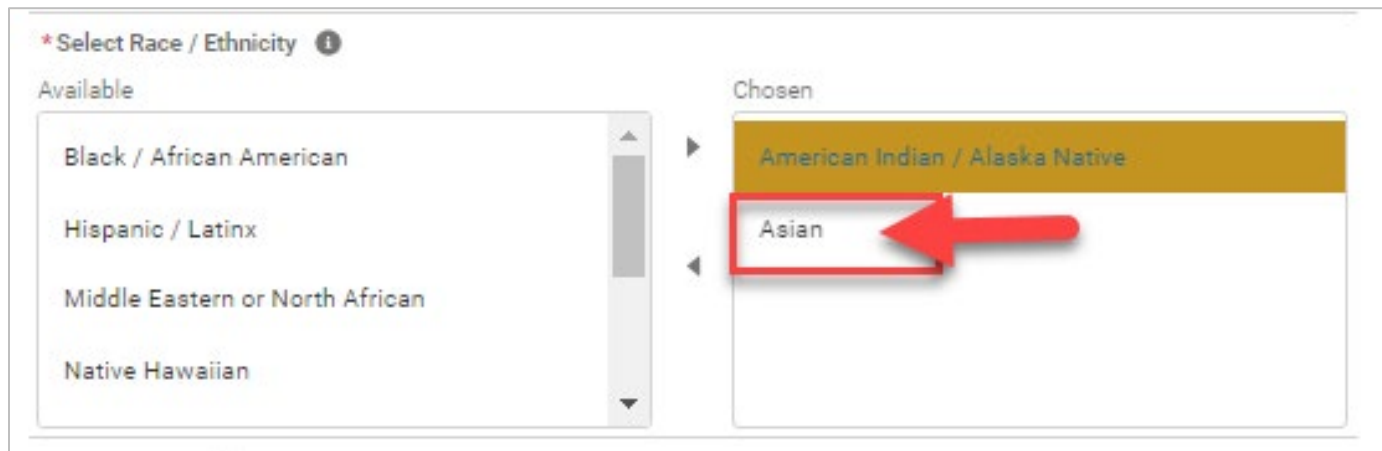
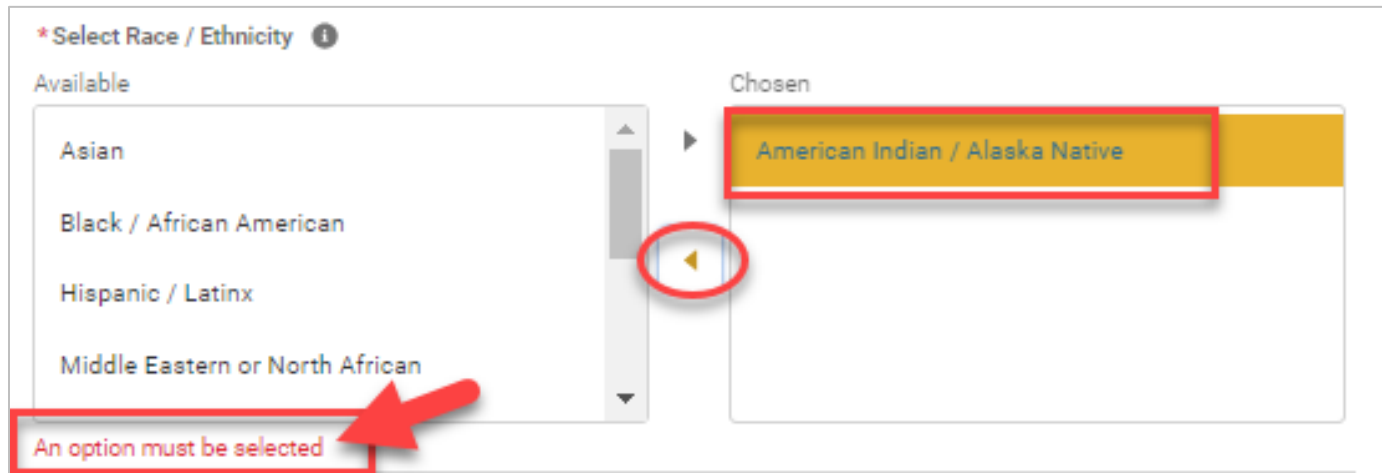
Hispanic / Latinx

Chosen

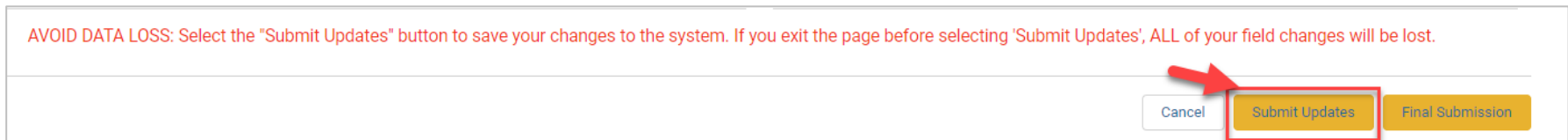


7. If a selection needs to be removed from the 'Chosen' box, select the option and then select the backward arrow.

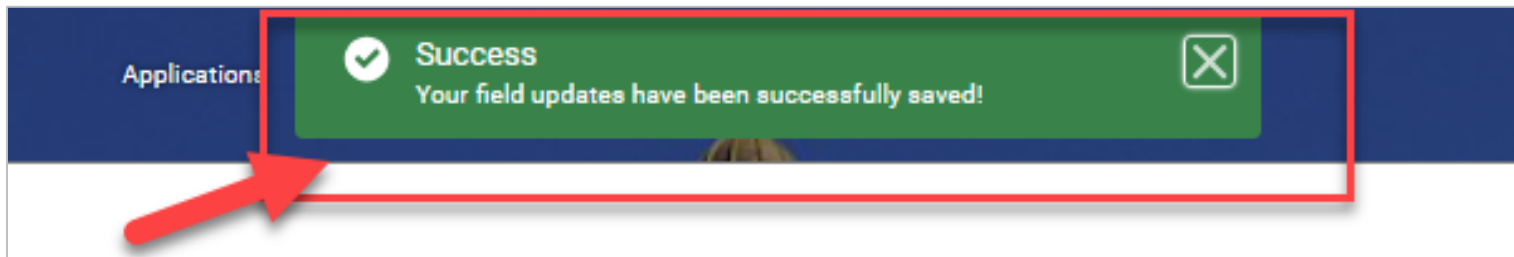
Note: Since this is a required field, an option must be selected. The correct selection must be moved to the 'Chosen' box before the incorrect option can be removed.



- When ready, select 'Submit Updates' to save the updates.



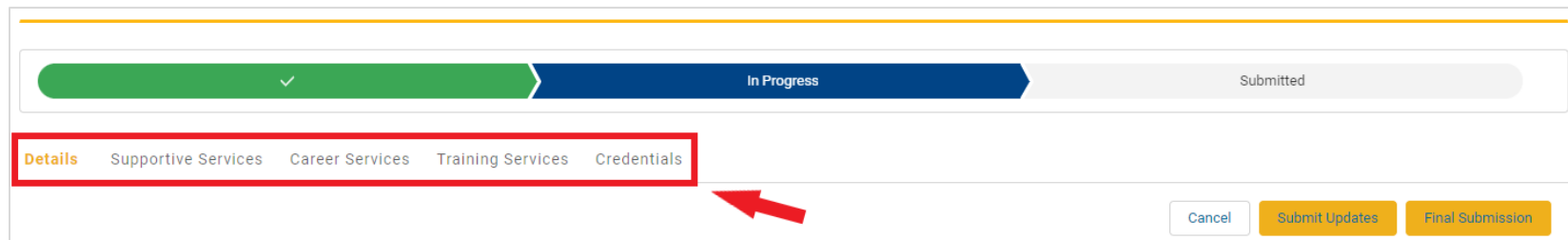
- If all data is accepted and saved, a 'Success' message will appear at the top of the screen.



ADDING SERVICES: MANUAL ENTRY

Access via Participant Data Detail Page

- The different service tabs can be accessed at the top of the **Data Detail** page after all the required participant information has been entered.



2. Ensure the correct services are selected using the pick list and enter all required information under the **Exit Information** section on the Details page.

Note: The system will not allow information to be entered on the service tabs until the appropriate service tabs are moved to the 'Chosen' box using the pick list.

Exit Information

* Has participant exited the program? ?

No

* Which services were provided? ?

Available

Career Services

Training Services

Chosen

Supportive Services

Exit Date ?

3. Add services as needed by selecting the 'New' button on the right-hand side of each service tab.

Progress bar: ✓ In Progress Submitted

Details **Supportive Services** Career Services Training Services Credentials

Supportive Services
0 items found

Q Search... **New**

Name	Service Provider Name	Supportive Service Name
------	-----------------------	-------------------------

4. A new form will appear, requiring certain fields to be completed. Fill in the required fields indicated with a red asterisk (*). Be sure to hit the 'Save' button to complete the process of adding services.

Note: This process should be repeated as needed for Supportive, Career, and Training Services, as well as Credentials on the appropriate tabs.

New Supportive Services

* = Required Information

Information

* Service Provider Name ⓘ
Complete this field.

* Supportive Service Name ⓘ
Complete this field.

* Service Start Date ⓘ
Complete this field.

* Supportive Service Status ⓘ
--None--
Complete this field.

Supportive Service Type Information

* Supportive Service Type ⓘ
--None--
Complete this field.

Cancel Save & New Save

5. The required fields will no longer be editable once service data has been entered and saved.

Please Note: If changes need to be made after data is saved in the system, email the Research Unit inbox at ResearchUnit@cwdb.ca.gov.

Edit SS-0729

* = Required Information

Information

<p>* Service Provider Name ⓘ</p> <input type="text" value="TEST"/> <p>Read-only field.</p> <p>* Service Start Date ⓘ</p> <input type="text" value="1/10/2024"/>	<p>* Supportive Service Name ⓘ</p> <input type="text" value="Housing Stipend"/> <p>Read-only field.</p> <p>* Supportive Service Status ⓘ</p> <input type="text" value="Completed"/>
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Supportive Service Type Information

<p>* Supportive Service Type ⓘ</p> <input type="text" value="Housing Assi"/> <p>Read-only field.</p>	<p>* Supportive Service Status ⓘ</p> <input type="text" value="Completed"/>
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⊘ We hit a snag.

Review the following fields

- Supportive Service Name
- Supportive Service Type
- Service Provider Name

⊘

FINAL SUBMISSION: MANUAL ENTRY

Access via Participant Data Detail Page

1. When a grantee has finished providing services to a participant, the data must be submitted by selecting the 'Final Submission' button. This will likely be toward the end of the grant term.

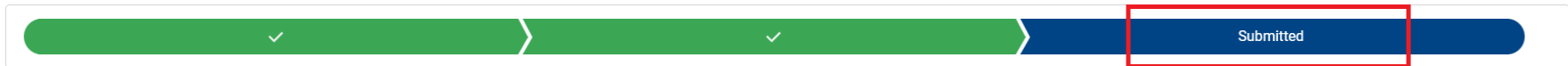
*Note: The 'Final Submission' button is located on the **Details tab** at the top and bottom of the screen.*

The screenshot illustrates the 'Details tab' interface in two sections:

- Top of Details tab:** A progress bar at the top shows 'Submitted' as the current status. Below the progress bar, the 'Details' tab is selected, with other tabs including 'Supportive Services', 'Career Services', 'Training Services', and 'Credentials'. At the bottom right, three buttons are visible: 'Cancel', 'Submit Updates', and 'Final Submission'. The 'Final Submission' button is highlighted with a red box and a red arrow pointing to it.
- Bottom of Details tab:** A red warning message reads: "AVOID DATA LOSS: Select the 'Submit Updates' button to save your changes to the system. If you exit the page before selecting 'Submit Updates', ALL of your field changes will be lost." Below this message, the same three buttons ('Cancel', 'Submit Updates', and 'Final Submission') are displayed. The 'Final Submission' button is again highlighted with a red box and a red arrow pointing to it.

2. The status of a participant's data is indicated on the **Progress Ribbon** at the top of each tab and on the **Participant Data** landing page.

Note: Once the 'Final Submission' button has been selected, no further external changes can be made to the participant's data.



Participant Data
3 items found

Q Search...

	Participant Data Na...	Grant Name	First Name	Last Name	Enrollment Date	Which services wer...	Exit Date	Status
1	PD-1533	Test_RERP_2701_1	Aarthas	Menethil				Created
2	PD-1532	Test_RERP_2701_1	Tom	Test	01/08/2024	Supportive Services;Career Services;Training Services	02/21/2024	Submitted
3	PD-1531	Test_RERP_2701_1	John	Test	01/08/2024	Supportive Services;Career Services		In Progress