

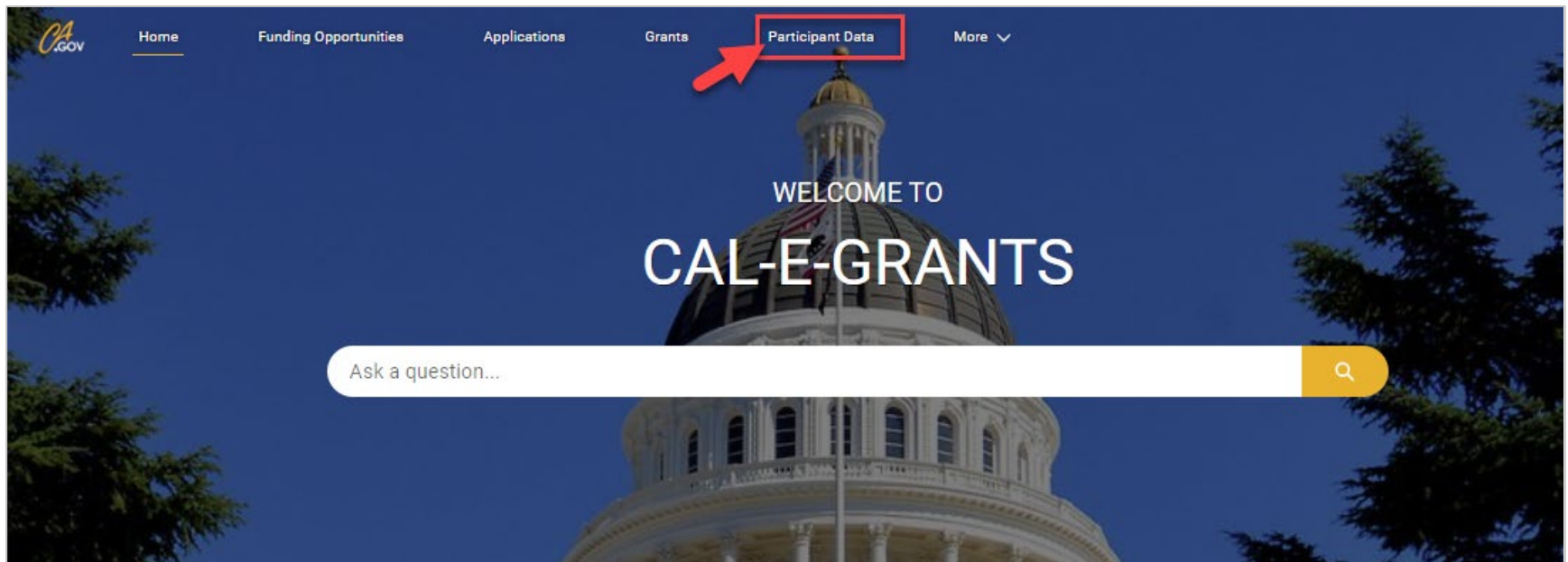
# CAL-E-GRANTS Reference Guide: PARTICIPANT DATA – UPLOAD PROCESS

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

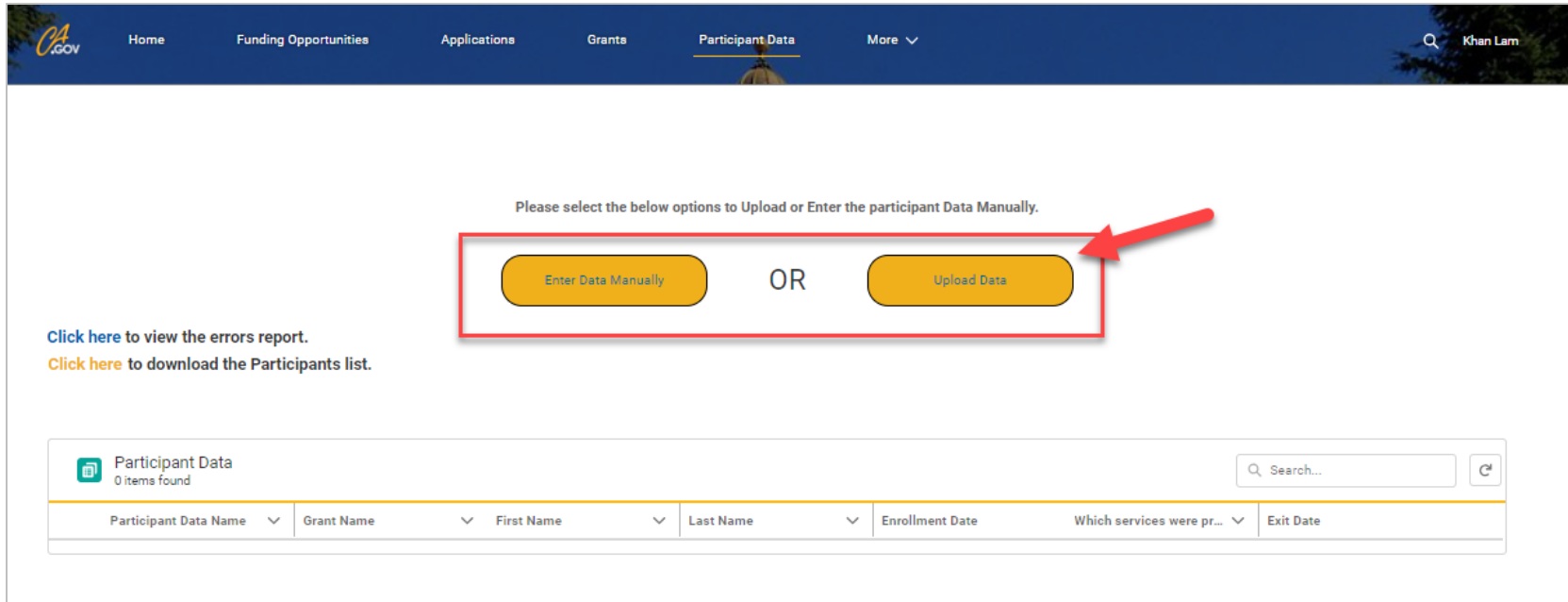
## ACCESSING PARTICIPANT DATA: UPLOAD PROCESS

Access via Participant Data Tab

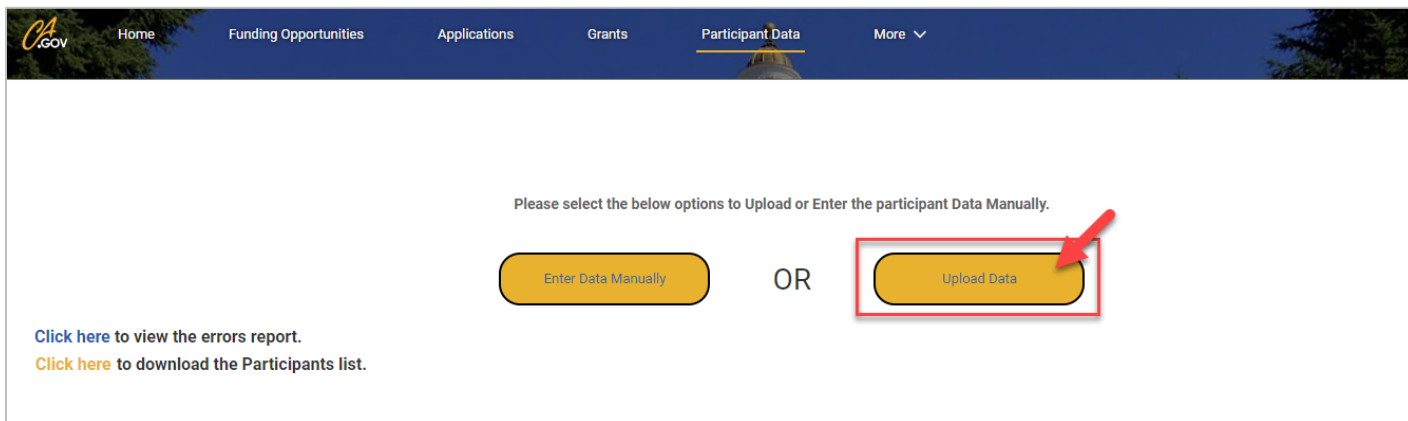
1. From the Cal-E-Grants landing page, select the **Participant Data** tab at the top of the page.



2. Enter Data Manually and Upload Data buttons are located at the top of the page.



3. Select the 'Upload Data' button.



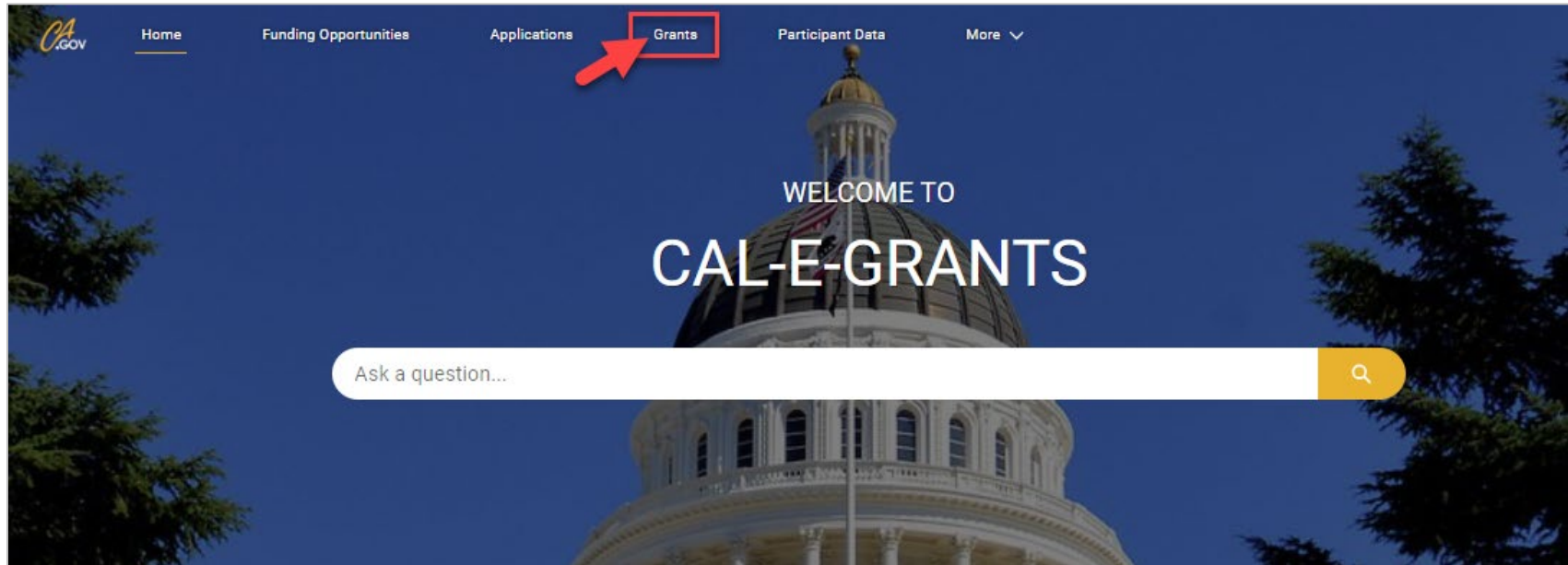
4. The **Upload Data** pop-up will appear.

Template	Download Template	Download Template Codes
Participant Information	<a href="#">Click here</a>	<a href="#">Click here</a>
Exit Information, Milestones & Post-Exit Outcomes	<a href="#">Click here</a>	<a href="#">Click here</a>
Career Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Supportive Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Training Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Credentials	<a href="#">Click here</a>	<a href="#">Click here</a>

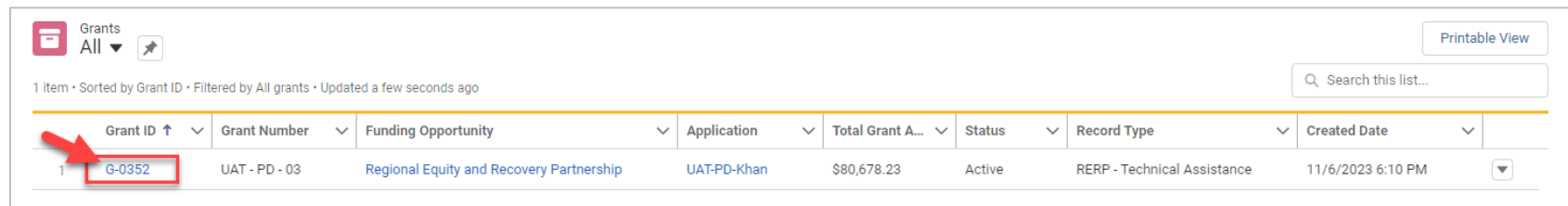
\* Please select a Grant

## Access via Grants Tab

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



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



Grants  
All

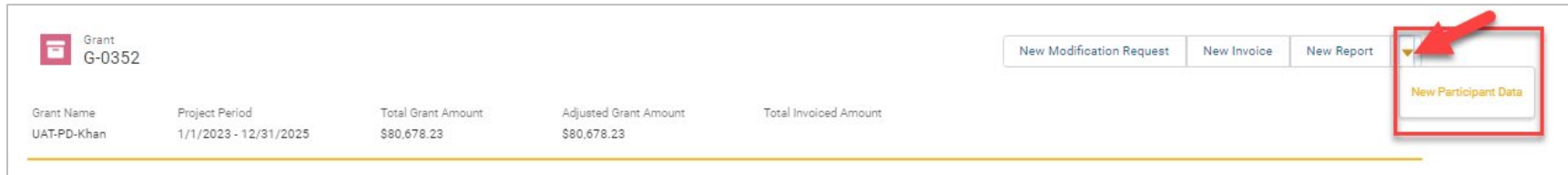
1 item • Sorted by Grant ID • Filtered by All grants • Updated a few seconds ago

Printable View

Search this list...

Grant ID ↑	Grant Number	Funding Opportunity	Application	Total Grant A...	Status	Record Type	Created Date
<a href="#">G-0352</a>	UAT - PD - 03	<a href="#">Regional Equity and Recovery Partnership</a>	UAT-PD-Khan	\$80,678.23	Active	RERP - Technical Assistance	11/6/2023 6:10 PM

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

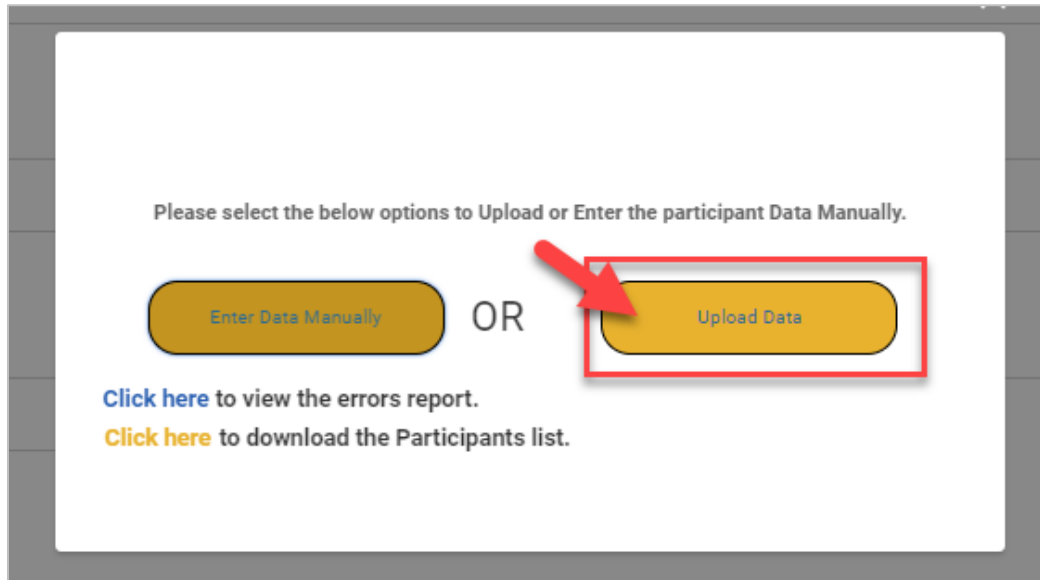


The screenshot shows the top section of a grant management interface. On the left, there is a header for 'Grant G-0352'. Below this, a table displays grant details:

Grant Name	Project Period	Total Grant Amount	Adjusted Grant Amount	Total Invoiced Amount
UAT-PD-Khan	1/1/2023 - 12/31/2025	\$80,678.23	\$80,678.23	

On the right side, there are three buttons: 'New Modification Request', 'New Invoice', and 'New Report'. A dropdown arrow is visible next to the 'New Report' button, and a red box highlights the 'New Participant Data' option that has been selected from the dropdown menu.

4. A pop-up will appear. Select 'Upload Data.'



The screenshot shows a pop-up dialog box with the following text:

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 'Upload Data' button is highlighted with a red box and a red arrow pointing to it.

5. An **Upload Data** pop-up will appear.

Upload Data		
Template	Download Template	Download Template Codes
Participant Information	<a href="#">Click here</a>	<a href="#">Click here</a>
Exit Information, Milestones & Post-Exit Outcomes	<a href="#">Click here</a>	<a href="#">Click here</a>
Career Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Supportive Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Training Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Credentials	<a href="#">Click here</a>	<a href="#">Click here</a>

\* Please select a Grant



## UPLOAD DATA OF PARTICIPANT DATA

- From the **Upload Data** popup, download all necessary templates and template codes.

Upload Data		
Template	Download Template	Download Template Codes
Participant Information	<a href="#">Click here</a>	<a href="#">Click here</a>
Exit Information, Milestones & Post-Exit Outcomes	<a href="#">Click here</a>	<a href="#">Click here</a>
Career Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Supportive Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Training Services	<a href="#">Click here</a>	<a href="#">Click here</a>
Credentials	<a href="#">Click here</a>	<a href="#">Click here</a>

- Complete and save the template(s) as a **.csv file**. Input all data starting in **Row 2**. Do not make any changes to Row 1.

▲	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Middle Name	Last Name	Date Of Birth	Social Security Number	Address Line 1	Address Line 2	City	State	Zip Code	Gender
2											
3											

3. Reference the **Template Codes** to the right of the 'Download Template' column for the formatting rules, codes, and descriptions of each field.

	<i>Required Field</i>	<i>Optional Field</i>	<i>Required Field</i>	<i>Required Field</i>	<i>Conditionally Required*</i>	<i>Required Field</i>
<b>Field</b>	<b>First Name</b>	<b>Middle Name</b>	<b>Last Name</b>	<b>Date of Birth</b>	<b>Social Security Number</b>	<b>Address Line 1</b>
<b>Format</b>	SINGLE LINE TEXT	SINGLE LINE TEXT	SINGLE LINE TEXT	MM/DD/YYYY	NUMBER ***.**-1234	SINGLE LINE TEXT
<b>Description</b>	Enter the legal first Name of the Participant	Enter the full middle Name of the Participant	Enter the legal last Name of the Participant	Enter the Month, day, & year of the Participant's date of birth	If Participant has an SS Number, then the Social Security Number is required.	Enter the Participant's home address. If Participant is homeless, enter the address of the service provider or similar

<i>Required Field</i>		<i>Required Field</i>	
<b>Transgender / Gender Nonconforming</b>	<b>Code</b>	<b>Sexual Orientation</b>	<b>Code</b>
Yes	Y	Heterosexual	1
No	N	Gay	2
Participant did not self-identify	P	Lesbian	3
		Bisexual	4
		Asexual	5
		Queer	6
		Other	7
		Participant did not self-identify	8
<b>Description</b>	Whether or not the participant identifies as transgender.	<b>Description</b>	The Participant's Sexual Orientation.



4. Select the Grant associated with the data upload. Then, complete required fields indicated by the red asterisk (\*). Drop or select the file to be uploaded.

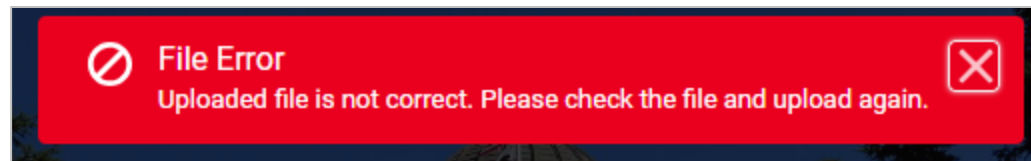
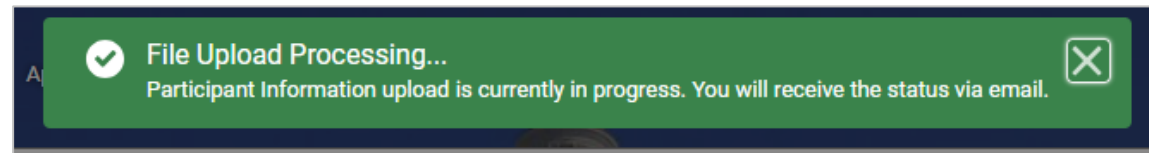
The screenshot shows a form with three main sections. The first section is titled '\* Please select a Grant' and contains a dropdown menu with 'G-0342' selected. A red callout box labeled '1 - Select the Grant' points to this dropdown. The second section is titled '\* Please select an option' and contains a list of radio buttons: 'Participant Information' (selected), 'Exit Information, Milestones & Post-Exit Outcomes', 'Career Services', 'Supportive Services', 'Training Services', and 'Credentials'. A red callout box labeled '2 - Select which file you will be uploading' points to this list. The third section is titled 'Upload Participant Information Data' and contains an 'Upload Files' button and the text 'Or drop files'. A red callout box labeled '3 - Upload the file' points to this section.

5. A green check mark will appear when the upload is ready. Select the **Done** button to complete the upload.

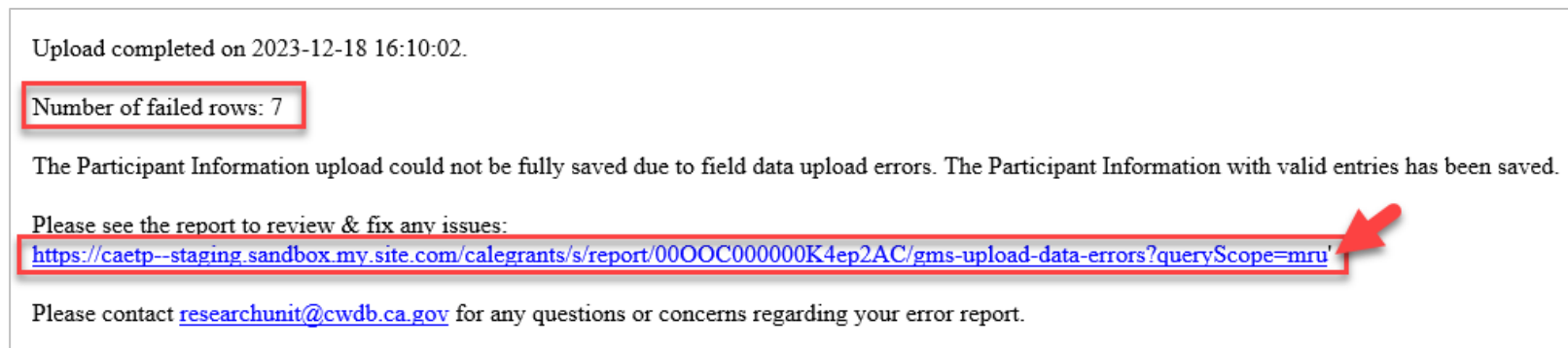
The screenshot shows the 'Upload Files' progress bar. The file 'GMS\_ParticipantInformationFileTemplate\_P...' (1 KB) is shown with a blue progress bar and a green checkmark icon. Below the progress bar, it says '1 of 1 file uploaded'. A red callout box labeled 'Done' points to a yellow button with the text 'Done'.

- The **File Upload Processing** message will appear at the top.

*Note: If there is an error with the file, a **File Error** message will appear. Please review the file and try to upload again.*



- An email of the upload status will be sent and will state the number of errors. Select the link to view the error report.



8. The report will list out each row number and error that needs to be addressed.

Report: Upload Data with Grant  
**GMS Upload Data Errors**

Total Records  
 10

<input type="checkbox"/> Upload Data: Created Date ↓	Grant: Grant ID ↑	Upload Time ↓	Upload Data: Name	Upload Type	File Name	Upload Row Number	Error Message
<input type="checkbox"/> 12/18/2023 (7)	G-0342 (7)	4:09 PM (7)	UD - 0024660	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	7	<ul style="list-style-type: none"> <li>• First Name is required.</li> <li>• Last Name is required.</li> <li>• Date Of Birth is required.</li> <li>• Address Line 1 is required.</li> <li>• City is required.</li> <li>• Zip Code is required.</li> <li>• Gender is required.</li> <li>• Transgender / Gender Nonconf</li> <li>• Sexual Orientation is requ...</li> </ul>
			UD - 0024661	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	8	<ul style="list-style-type: none"> <li>• First Name is required.</li> <li>• Last Name is required.</li> <li>• Date Of Birth is required.</li> <li>• Enter a valid Social Security Nu</li> <li>• Address Line 1 is required.</li> <li>• City is required.</li> <li>• Zip Code is required.</li> <li>• Gender is required.</li> <li>• ...</li> </ul>
			UD - 0024655	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	2	<ul style="list-style-type: none"> <li>• Migrant / Seasonal Farmworker Participant Information Codes te</li> </ul>
			UD - 0024656	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	3	<ul style="list-style-type: none"> <li>• Migrant / Seasonal Farmworker Participant Information Codes te</li> </ul>

Row Counts  Detail Rows  Subtotals  Grand Total

# EXPORT ERROR REPORT

1. Export report by selecting the **Export** button at the top right-hand corner.

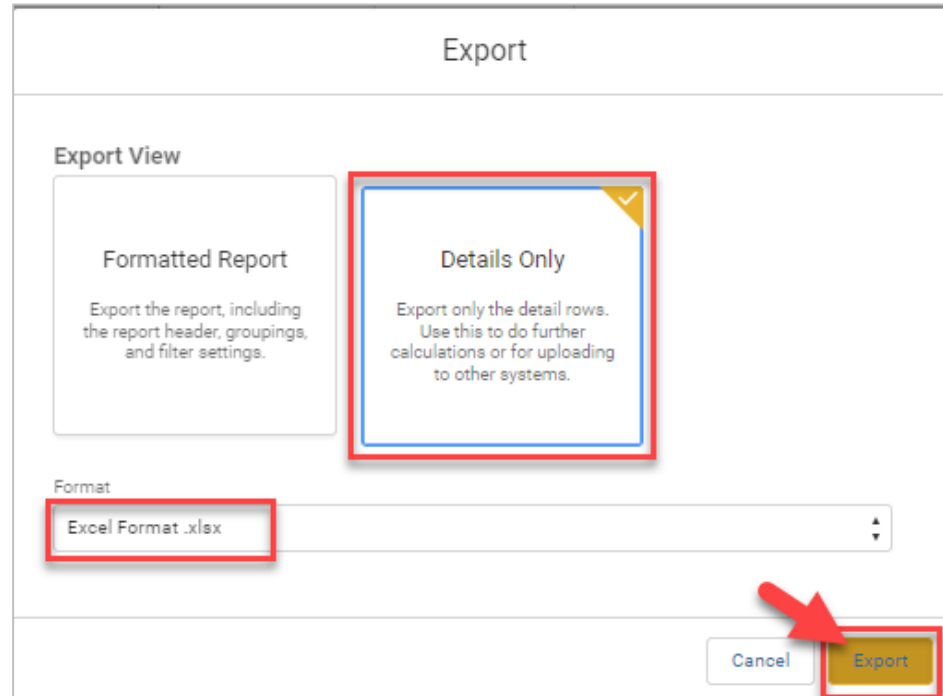
Report: Upload Data with Grant  
**GMS Upload Data Errors**

Total Records  
10

Upload Data: Created Date	Grant: Grant ID	Upload Time	Upload Data: Name	Upload Type	File Name	Upload Row Number	Error Message
12/18/2023 (7)	G-0342 (7)	4:09 PM (7)	UD - 0024660	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	7	<ul style="list-style-type: none"><li>• First Name is required.</li><li>• Last Name is required.</li><li>• Date Of Birth is required.</li><li>• Address Line 1 is required.</li><li>• City is required.</li><li>• Zip Code is required.</li><li>• Gender is required.</li><li>• Transgender / Gender Nonconf</li><li>• Sexual Orientation is requ...</li></ul>
			UD - 0024661	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	8	<ul style="list-style-type: none"><li>• First Name is required.</li><li>• Last Name is required.</li><li>• Date Of Birth is required.</li><li>• Enter a valid Social Security Nu</li><li>• Address Line 1 is required.</li><li>• City is required.</li><li>• Zip Code is required.</li><li>• Gender is required.</li><li>• ...</li></ul>
			UD - 0024655	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	2	<ul style="list-style-type: none"><li>• Migrant / Seasonal Farmworker Participant Information Codes te</li></ul>
			UD - 0024656	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	3	<ul style="list-style-type: none"><li>• Migrant / Seasonal Farmworker Participant Information Codes te</li></ul>

Row Counts  Detail Rows  Subtotals  Grand Total

- In Export View select **Details Only** format. Then in Format, select **Excel Format.xlsx**. Finally, select the **Export** button at the bottom right to complete the export.



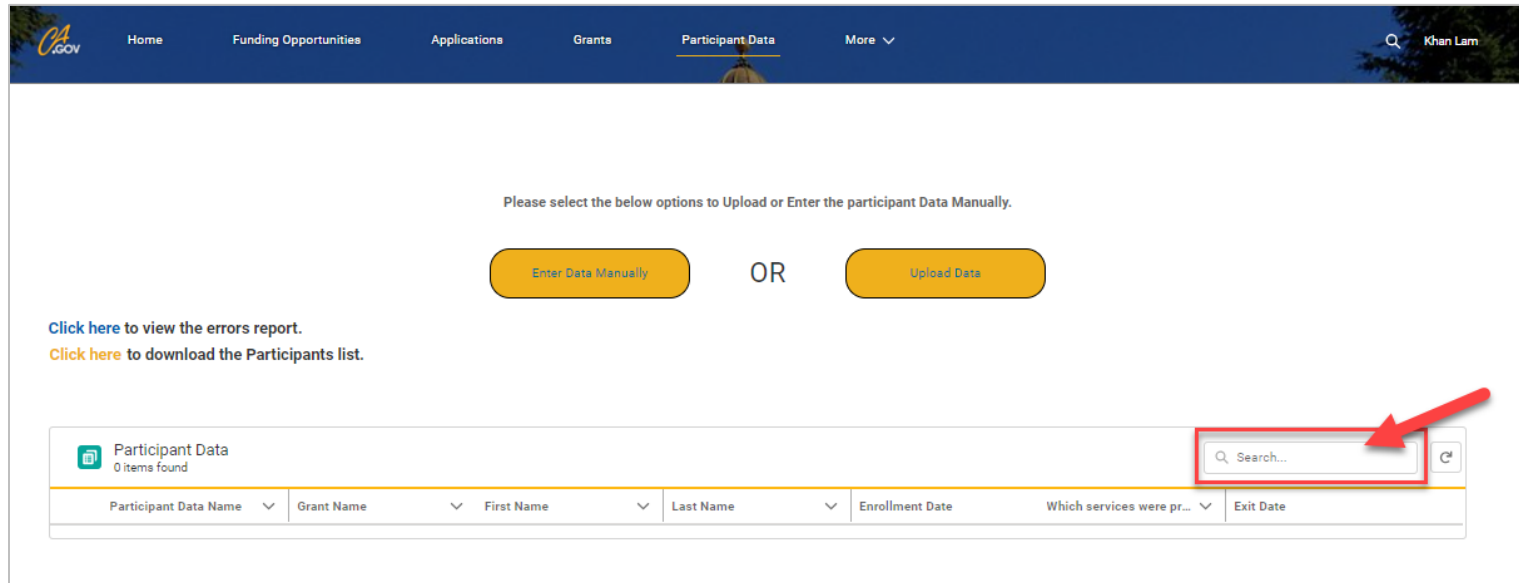
- Make all necessary corrections in the error report.

*Note: Changes can be manually corrected for each participant individually in Cal-E-Grants or corrected in the original spreadsheet and reuploaded.*

Upload Data:	Upload Type	File Name	Upload Row N	Error Message	Upload Date:	Create Grant:	Grant Upload Time
UD - 0017843	Participant Information	GGGMS_ParticipantInformationFileTemplate(1	2	-Unemployment Insurance (UI) Eligible option is not correct. Please check the Participant Information Codes template and correct it.	12/7/2023	G-0342	9:57 AM
UD - 0024660	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	7	-First Name is required -Last Name is required -Date Of Birth is required -Address Line 1 is required -City is required -Zip Code is required -Gender is required -Transgender / Gender Nonconforming is required -Sexual Orientation is requ	12/18/2023	G-0342	4:09 PM
UD - 0024661	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	8	-First Name is required -Last Name is required -Date Of Birth is required -Enter a valid Social Security Number, for example 123-45-6789 or 123456789 -Address Line 1 is required -City is required -Zip Code is required -Gender is requir	12/18/2023	G-0342	4:09 PM
UD - 0024655	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	2	-Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and correct it.	12/18/2023	G-0342	4:09 PM
UD - 0024656	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	3	-Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and correct it.	12/18/2023	G-0342	4:09 PM
UD - 0024653	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	6	-First Name is required -Last Name is required -Date Of Birth is required -Address Line 1 is required -City is required -Zip Code is required -Gender is required -Transgender / Gender Nonconforming is required -Sexual Orientation is requ	12/18/2023	G-0342	4:09 PM
UD - 0017845	Participant Information	GGGMS_ParticipantInformationFileTemplate(1	2	-Unemployment Insurance (UI) Eligible option is not correct. Please check the Participant Information Codes template and correct it.	12/7/2023	G-0342	9:58 AM
UD - 0017846	Participant Information	GGGMS_ParticipantInformationFileTemplate(1	2	-Date Of Birth format is not correct. Format must be MMDDYYYY	12/7/2023	G-0342	10:04 AM
UD - 0024657	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	4	-Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and correct it.	12/18/2023	G-0342	4:09 PM
UD - 0024658	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	5	-Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and correct it.	12/18/2023	G-0342	4:09 PM

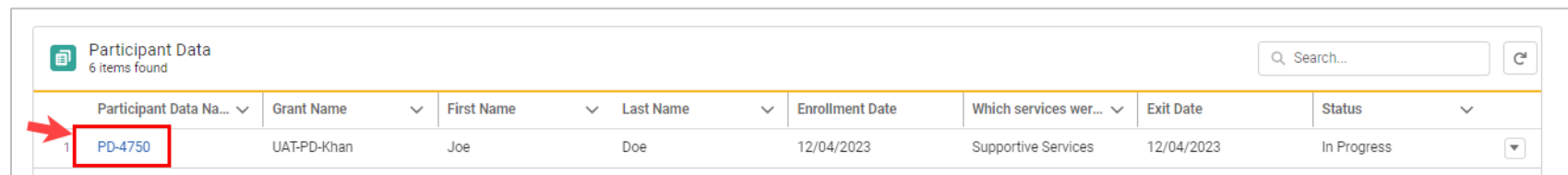
## VIEWING THE PARTICIPANT DATA DETAIL PAGE

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



The screenshot shows the top navigation bar with the CA.GOV logo and menu items: Home, Funding Opportunities, Applications, Grants, Participant Data (active), and More. The user name 'Khan Lam' is in the top right. The main content area has a message: 'Please select the below options to Upload or Enter the participant Data Manually.' with two buttons: 'Enter Data Manually' and 'Upload Data'. Below this are two links: 'Click here to view the errors report.' and 'Click here to download the Participants list.' At the bottom, there is a table header for 'Participant Data' with 0 items found. A search bar is located at the top right of the table, highlighted with a red box and a red arrow pointing to it. The table columns are: Participant Data Name, Grant Name, First Name, Last Name, Enrollment Date, Which services were pr..., and Exit Date.

2. Select a **Participant Data Name** to open.

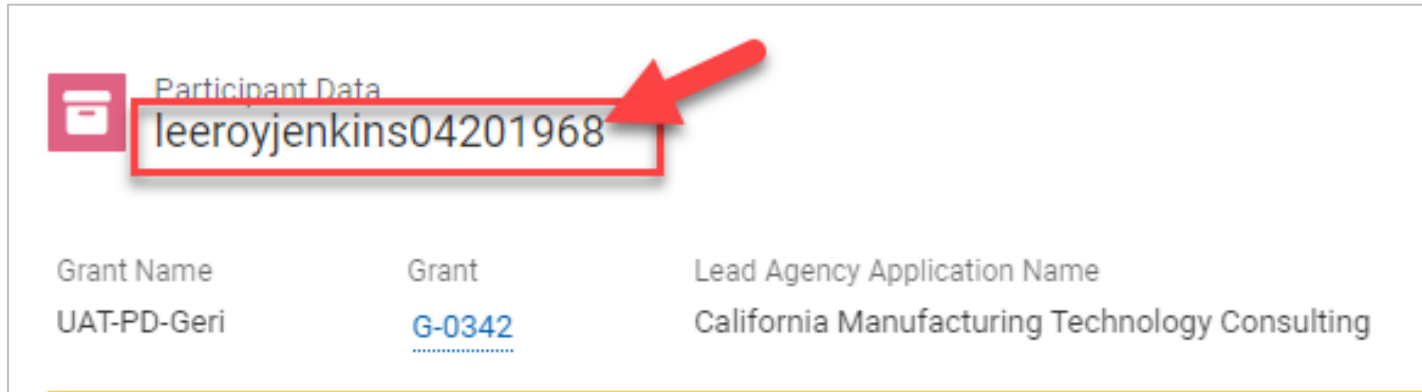


The screenshot shows the 'Participant Data' table with 6 items found. A search bar is at the top right. The table has columns: Participant Data Name, Grant Name, First Name, Last Name, Enrollment Date, Which services were pr..., Exit Date, and Status. The first row is selected and highlighted with a red box and a red arrow pointing to it. The data in the first row is: 1, PD-4750, UAT-PD-Khan, Joe, Doe, 12/04/2023, Supportive Services, 12/04/2023, In Progress.

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

3. The **Participant ID** is located at the top of the **Participant Data** page.

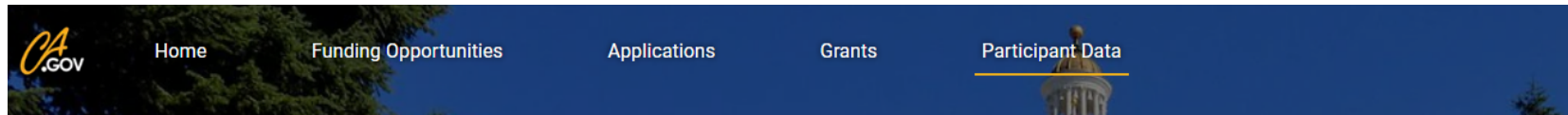
**Please Note:** The Participant ID is required to upload data on each subsequent tab following 'Participant Information.'



*The naming convention will follow the format:*

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

4. The Participant ID can be downloaded in a Participant list from the **Click here** button on the left side.



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.



5. Scroll down to the editable fields and input any updates. The **Participant Information** section can only be edited by internal staff.

Progress bar: In Progress

Navigation tabs: Details, Supportive Services, Career Services, Training Services, Credentials

Buttons: Cancel, Submit Updates, Final Submission

**Participant Information**

First Name Leeroy	Last Name Jenkins
Date Of Birth 04/20/1968	Social Security Number *****8354
Middle Name	Address Line 1 420 Draenor Hollows
Address Line 2	City Dalaran
State CA	Zip Code 94550
Gender Male	Transgender / Gender Nonconforming No
Sexual Orientation Heterosexual	Select Race / Ethnicity White
Other Race / Ethnicity	School Status Currently in school

6. Complete **Exit Information** section. All required fields are indicated by the red asterisk (\*).

**Exit Information**

\* Has participant exited the program?   
 -None-

\* Which services were provided?   
 Available: Supportive Services, Career Services, Training Services   
 Chosen:

Exit Date

7. Complete **Milestones Information** section.

▼ Milestones Information

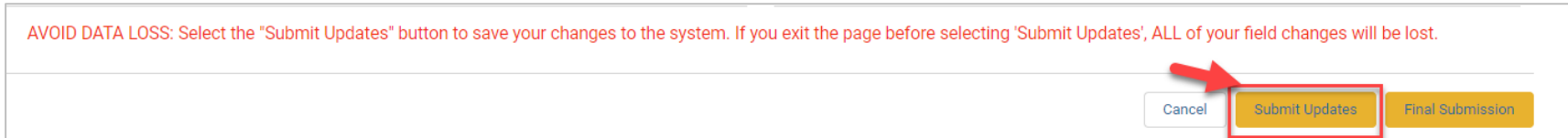
Skill Gain: Training Milestone ⓘ	Skill Gain: Skills Progression ⓘ
--None--	--None--
Stabilized Housing ⓘ	Improved Health ⓘ
--None--	--None--
Improved Personal Finances ⓘ	
--None--	

8. Complete **Post-Exit Outcomes Information** section.

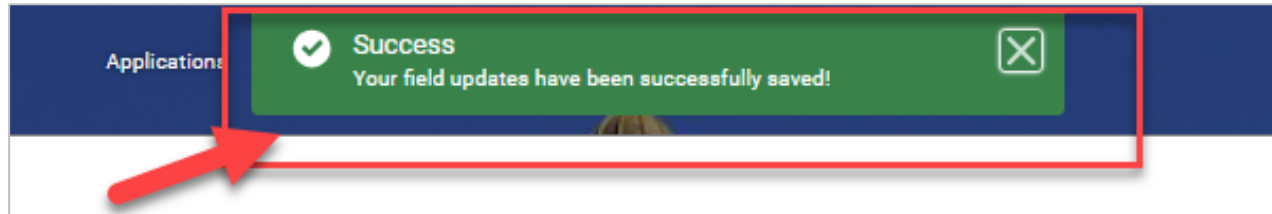
▼ Post-Exit Outcomes Information

Post-Exit Employed ⓘ	Holding Multiple Jobs ⓘ									
--None--	--None--									
Post-Exit Employment Related to Training ⓘ	Career Advancement for Incumbent Worker ⓘ									
--None--	--None--									
Post-Exit Wages or Salary (quarterly) ⓘ	Occupation Description ⓘ									
<a href="#">O*Net Code Lookup Tool Here</a>	Post-Exit Postsecondary Education ⓘ									
Occupation (O*NET-SOC code) ⓘ	--None--									
<b>Benefits</b> ⓘ	Post-Exit DAS Registered Apprenticeship ⓘ									
Available	--None--									
<table border="1"><tr><td>Paid Sick Leave</td><td>▶</td><td rowspan="4">Chosen</td></tr><tr><td>Paid Family Leave</td><td>▶</td></tr><tr><td>Health Insurance</td><td>▶</td></tr><tr><td>Retirement Plan</td><td>▶</td></tr></table>	Paid Sick Leave	▶	Chosen	Paid Family Leave	▶	Health Insurance	▶	Retirement Plan	▶	
Paid Sick Leave	▶	Chosen								
Paid Family Leave	▶									
Health Insurance	▶									
Retirement Plan	▶									

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



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



# FINAL SUBMISSION

## 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.*

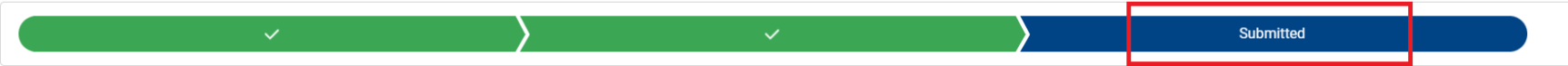
The screenshot illustrates the 'Final Submission' process on the Participant Data Detail Page. It is divided into two sections: 'Top of Details tab' and 'Bottom of Details tab'.

**Top of Details tab:** A progress bar at the top shows three stages: 'Completed' (green), 'In Progress' (blue), and 'Submitted' (grey). 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, there are three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'. A red arrow points to the 'Final Submission' button, which is highlighted with a red box.


**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 the message, the same three buttons ('Cancel', 'Submit Updates', and 'Final Submission') are displayed. A red arrow points to the 'Final Submission' button, which is highlighted with a red box.

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