



CAL E-GRANTS PARTICIPANT DATA PORTAL

Frequently Asked Questions as of April 19, 2024

Introduction to the Cal E-Grants Participant Data Reporting Portal

Q1: What is the Cal E-Grants Participant Data Portal?

A1: The Cal E-Grants (CEG) participant data portal serves as the official long-term platform for California Workforce Development Board (CWDB) grantees to report participant data. It comprises a suite of tools for uploading, validating, and submitting data, seamlessly integrated into the existing Cal E-Grants system. The initial version of this portal is currently undergoing deployment for public use, testing and feedback. Future enhancements and improvements are planned based on user feedback and evolving needs.

Q2: Is the Cal E-Grants Participant Data module the same as the State Grant Data Solution (SGDS)?

A2: The Cal E-Grants participant data portal requires much of the same data to be entered as the State Grant Data Solution (SGDS). However, it enhances the SGDS excel workbook by offering automated data validation and an improved cloud-based data reporting interface.

Q3: Can I use the Cal E-Grants participant data portal for case management?

A3: The Cal E-Grants participant data portal currently does not feature case management tools. Case management features are planned in future versions of the portal and are expected to be ready in 2025.

Q4: How has the system been designed to be user-friendly and self-explanatory?

A4: The new system has been designed with user-friendliness in mind, with intuitive interfaces and clear instructions. While there may be unforeseen issues initially, the team is dedicated to addressing them promptly and appreciates users' patience and feedback during this transition period.

Q5: How does data entry align with data entry in CalJOBS?

A5: Data points won't align exactly with the new system, although there are many similarities between variables in the two systems. Data entry in CalJOBS for state-funded programs is no longer required but CalJOBS can be used for case management purposes if needed.

Q6: How are participants enrolled?

A6: Participant data can be either manually entered or uploaded in batches using the templates provided on the CEG platform. Guidance is available on the newly developed [Participant Data Guidance](#) webpage.

Q7: What is considered participant data?

A7: Individual level data including demographics, services and/or credentials received, and outcomes.

Transitioning to the Cal E-Grants Participant Data Reporting Portal

Q8: Is using Cal E-Grants for data reporting required?

A8: Yes, all data for new participants who have been onboarded on or after the Cal E-Grants start date for your program must be entered into Cal E-Grants for state-funded grant programs.

Q9: Is using CalJOBS in addition to Cal E-Grants for data reporting required?

A9: No, grantees of state-funded grants have the option to use CalJOBS for case management, but it is not mandatory. However, grantees receiving certain federal grants may be required to use CalJOBS.

Q10: Is double entry of participant data into CalJOBS and Cal E-Grants required?

A10: Double entry of the same participant data into CalJOBS and Cal E-Grants is not required unless participants are co-enrolled in grants that specifically require the usage of CalJOBS.

Q11: What will happen to data that has already been reported via CalJOBS or SGDS?

A11: Grantees will have until 09/01/2024 to migrate any existing data from CalJOBS/SGDS to the new Cal E-Grants system. The CWDB Research Unit will be available upon request to provide guidance on data migration, and provide individualized technical assistance as needed. A user guide to transferring existing participant data into CEG is also currently under development and will be posted on the CWDB website upon completion. If more time is needed to migrate existing data over to the new system, please reach out to the Research Unit at ResearchUnit@cwdb.ca.gov.

Q12: When should I report participant data to the portal? Can I enter participant data for planned services and expected outcomes?

A12: Grantees have the option to enter data into Cal E-Grants either in real time or in batches. For instance, real-time data reporting involves entering the details of each participant as they are onboarded. On the other hand, batch data reporting entails collecting the details of multiple onboarded participants and reporting the data at once. It's important to note that data should

only be entered for activities and events that have already occurred, and planned activities or expected outcomes should not be reported.

Q13: Is there a 30-day deadline similar to CalJOBS that participants need to be enrolled in the new system?

A13: There is no limit on when the data can be entered. However, we do ask that participants are entered within a reasonable timeframe. Reporting deadlines have not changed and data will be checked by CWDB quarterly.

Q14: Are supplemental reports still required to be submitted?

A14: At this time, supplemental reports are not required to be submitted. However, please continue to track the data until additional, grant-specific variables are collected in CEG. In the meantime, the data currently captured in supplemental reports will be collected in semi-annual progress reports.

Account Configurations and Setup

Q15: How are new accounts created for Cal E-Grants?

A15: The grant administrator from your organization has the ability to create new accounts in CEG for data entry as needed. In certain cases, the fiscal agent will be in control of how the data is entered for partner agencies.

Q16: Our agency has a CEG account that is already associated with one grant through an established partnership in our region. How can we gain access to a different grant in CEG outside of that partnership?

A16: Currently, the workaround for this is to use a different email address to gain access to a separate grant that is linked to a different fiscal agent. The system associates email addresses with one organization (lead fiscal agent), so grantees have access to the grants under that organization. However, a trick for creating a unique email address is to add a '+<anything>' before the @ symbol in an email address. For example, Jane@email.com (real) and Jane+P2E@email.com (dummy) would be considered unique in the system, but all emails sent to either address for password reset purposes would be routed to the real email address. This solution nullifies the need for grantees to actually have to create multiple email addresses to link accounts to separate fiscal agents.

Q17: Can multiple staff members have access to enter data, or should it be centralized? If we grant contracted service providers access to enter participant data, can they also access our organizations grant applications, etc.?

A17: The system allows for flexibility in data entry. Each board can choose to enter data independently or have a centralized approach, depending on their comfort level and workflows. However, at this time, there are not different levels of privileges set up within the system. This

means that all users from an organization or local board have access to view all of the modules in the system and should be taken into consideration when creating new accounts for frontline staff. We plan to address this issue as soon as possible by assigning privilege tiers for users.

Q18: We are the lead agency and we have sub-grantees. Do the sub-grantees need access to the CEG system to enter the data for the participants they serve?

A18: That is up to the grantee. The system will support either approach, but at this time, there are no tiered levels of privilege that would prevent users from viewing all aspects of the grant. If you'd like to use a centralized approach for data entry, that is okay as well. If taking the centralized approach, we recommend that the templates and codebooks are securely shared with your partners and uploaded by the fiscal agent directly once completed. Secure sharing can be done through file encryption and encrypted emails, or platforms such as Box, Dropbox, OneDrive, or SharePoint.

Q19: Which individuals within my organization should be entering data into the Cal E-Grants portal?

A19: There are no specific requirements on which individuals should be entering data within the Cal E-Grants system. Grantees can continue using the existing division of labor that works for their organization to report data into the Cal E-Grants system.

Q20: Is there a cap on users that can be added in CEG?

A20: No, there is no cap on the number of users that can be added to CEG.

Features and Data Entry

Q21: Will all grantees across grant programs be required to submit the same data fields? Are there any special data fields required for certain grants?

A21: At this time all grantees will be reporting the same data fields. Future versions of the Cal E-Grants participant data reporting portal may support additional data fields for certain grants.

Q22: We co-enroll between grants for example a participant can be served out of both P2E and RERP at the same time if they are eligible and need the services. (Ex: Training out of RERP, Supportive Services out of P2E) Will we have to enter the same participant data separately for both grants? or is there a way to add multiple grants to one participant and indicate which activities were provided out of which grant?

A22: Co-enrollment in multiple grant programs is allowed if a participant meets eligibility requirements, but the participant's information would need to be entered for both grants. The system will not auto-populate the participant's information for both grant programs, even if both programs are in CEG. Co-enrollment across CalJOBS and CEG (example: WAF and P2E) will also require double entry in both platforms.

Q23: Should services be reported as individual services or can services be bundled?

A23: Services should be reported individually as much as possible. If many services are bundled together, it may become unrealistic to report individual services for all participants. In such cases, services can be reported as bundles, provided that these bundles are consistently named and defined across all participants. It's recommended to thoroughly define these service bundles in your narrative reports to ensure clarity and consistency.

Q24: Can I save my data entry progress in Cal E-Grants and continue later?

A24: Cal E-Grants supports saving data entry progress as sections are completed. That is, each individual section must be completed for progress to be saved. Partial sections cannot be saved. However, not all sections need to be filled out and submitted at the same time.

Q25: Can data be overwritten while using the data upload functionality?

A25: No, Cal E-Grants checks for data duplication while data is being entered, whether the data is being uploaded or manually entered. The system checks for duplicates based on a combination of first name, last name, date of birth, and social security number. If it finds a duplicate, it will not allow a new record to be created.

Q26: How should income be reported if the participant reports an income range instead of a single income figure?

A26: Individual and household income should be reported as a single income figure. Income ranges are not supported by the portal. If an income range is received from the participants, an average of that range should be reported.

Q27: How should data be entered for different boards within a Regional Planning Unit (RPU)?

A27: Data can be entered either aggregated for the entire RPU or separately for each local board. The system supports both approaches.

Q28: How are SSNs handled in the new system, as well as pseudo-SSNs?

A28: SSNs are not required to be entered, although that information is requested by CWDB for important base wage file information. Depending on the type of data entry, if a participant does not have an SSN, staff will have the option to either leave the field blank when batch uploading data or selecting 'No,' indicating the participant doesn't have an SSN when manually entering data. There is no need for pseudo-SSNs in CEG.

Q29: Will Cal E-Grants require the same document verification/uploading as in CalJOBS?

A29: CWDB does not require verification documentation regarding eligibility. Such documentation would be required in certain circumstances involving a monitoring/auditing situation, which wouldn't come from CWDB. Since there is always the possibility of an audit from other state agencies, CWDB does recommend collecting and securely storing such documentation, but there is not a place to save the documents in the system.

Q30: If for any reason there is an empty cell in our data, will there be an error message? If so, how do we go about it?

A30: You will receive an error message if the field is required, and the system will not accept the data that was submitted. If batch uploading, the sheet will need to be corrected and reuploaded. Alternatively, you are able to enter the information manually and correct fields as needed.

Q31: If participants aren't exited when they become employed, can we come back at a future date to complete the post-exit information?

A31: Yes, there is no time limit on when participants must be exited and data can be entered at the discretion of the organization. However, the final submission button will "submit" the participant's data and lock it from future editing. Therefore, please use the final submission button only for participants that have finished receiving services and exited the program.

Q32: What should we do in cases where participants stop showing up for services and become unreachable before we have collected all of the data?

A32: In such cases, please enter the data that is available and some participants may be left enrolled but not exited as needed.

Q33: Can we use the participant IDs that have been created in CalJOBS or the State Grant Data Solution (SGDS) for our existing participants?

A33: Participant IDs will not be the same as the one you have been using but are generated by the new system after the participant information has been entered or uploaded. The participant ID generated by the system will then be used for subsequent tabs when batch uploading data.

Q34: What is included in the templates that we download from CEG? What is the difference between the template and the codebook?

A34: For batch uploads, there are separate templates in CEG containing the variables collected on the specified tab. The codebook will need to be referenced to enter the correct codes into the corresponding template that the system will recognize.

Q35: Can we switch between batch uploading data and manually entering participant data?

A35: Yes, each approach can be used interchangeably depending on what is appropriate for the scenario. The system won't accept duplicate information, but as long as you are entering new data, either method could be used.

Q36: Are the templates downloadable files, or is the participant data entered through an application?

A36: The templates and the codebooks are downloadable files from the Cal E-Grants desktop site when batch uploading participant data. Data can also be manually entered individually by using the desktop site.

Q37: When we download the templates from Cal E-Grants they are in .csv format. Do they need to be in .csv format when they are uploaded?

A37: Yes. The template will need to be in .csv format when it is uploaded to CEG or you will receive an error message and the system will not accept the file.

Q38: Can case notes be entered in CEG?

A38: Not at this time. Hopefully, that functionality will be added to future version rollouts as the platform moves toward a full case management system.

Q39: Does the system generate exportable reports?

A39: We are actively working with the developer to implement canned reporting functionalities. The system currently has the functionality to search and filter data, but exportable reports for services provided are not yet available. You can download a 'participant list' from the system currently. If you need a report that is more specific, please reach out to the Research team by emailing ResearchUnit@cwdb.ca.gov.

Learning and Support

Q40: How can grantees learn how to use the Cal E-Grants System?

A40: Grantees have access to process manuals, 2024 training schedule, and a video tutorial on the various aspects of using the Cal E-Grants data reporting portal on the [Participant Data Guidance](#) webpage. CWDB will also host several office hour sessions where grantees will be able to ask questions and receive tips from the CWDB team. The Research team will also host quarterly walkthroughs of the participant data module in CEG for the remainder of 2024. Finally, grantees can reach the CWDB Research team directly for technical assistance by sending an email to ResearchUnit@cwdb.ca.gov.

Q41: How do I request corrections to data I have already entered in Cal E-Grants?

A41: Grantees can request data corrections by sending an email containing the reason of change and the details to be changed to ResearchUnit@cwdb.ca.gov.

Q42: Who can help address Cal E-Grants account issues?

A42: Grant managers should have the ability to manage and add users within their organization. For account issues, users can contact the ETP command center help desk by emailing etpcaleforce@etp.ca.gov.

Q43: How can users provide feedback on the system and suggest improvements?

A43: Users can provide feedback on the new system and suggest improvements by directly contacting the team at ResearchUnit@cwdb.ca.gov. Feedback is valuable for enhancing the system based on user needs and experiences. Suggestions for improvement are welcome and will be considered for future updates.

Q44: Is there a plan to support grantees through the transition and address concerns about data entry efficiency?

A44: Yes, the leadership team is open to suggestions and feedback to make the transition smoother. Training and support will be provided upon request to ensure that grantees can effectively use the new system.

Q45: Are previous data systems still available to use?

A45: We are not disabling CalJOBS or SGDS, so they will remain accessible to ease the transition to the new data system. However, the preferred data entry method is Cal E-Grants once your grant program becomes available. Once the participant data module in Cal E-Grants becomes available for your grant program, grantees are no longer required to submit SGDS workbooks.

Q46: Are there any specific eligibility requirements outside of the variables that are collected in CEG?

A46: We would recommend referring to the Request for Applications (RFA) for your grant program for more information related to eligibility. CEG does not have specific eligibility requirements, but rather, serves as an information bank to collect any data that is entered.

Q47: Some of the required fields in CEG include information that we did not collect in the past, so what should we do in that situation?

A47: We suggest reaching out to the Research team directly by emailing ResearchUnit@cwdb.ca.gov to discuss specific examples individually.

Q48: What would be the best way to update that contact information for future communications regarding training and participant data?

A48: Please contact the appropriate Program Implementation team at CWDB to update any specific point of contact information. If you are unsure of the appropriate Program team to contact, you may reach out to the Research team who can direct you to the correct team.

Q49: How do you suggest collecting some of the highly sensitive data?

A49: Some suggestions when collecting sensitive information include the following: create a self-administered survey or application as part of the intake process, assure confidentiality, explain why you are asking for the information, put your demographic questions at the end, present sensitive questions toward the end (but not the very end). This is not an exhaustive list, nor is it mandated to collect sensitive information in this way. However, these approaches may make participants and staff feel more comfortable when it comes to collecting very important, sensitive information.