



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

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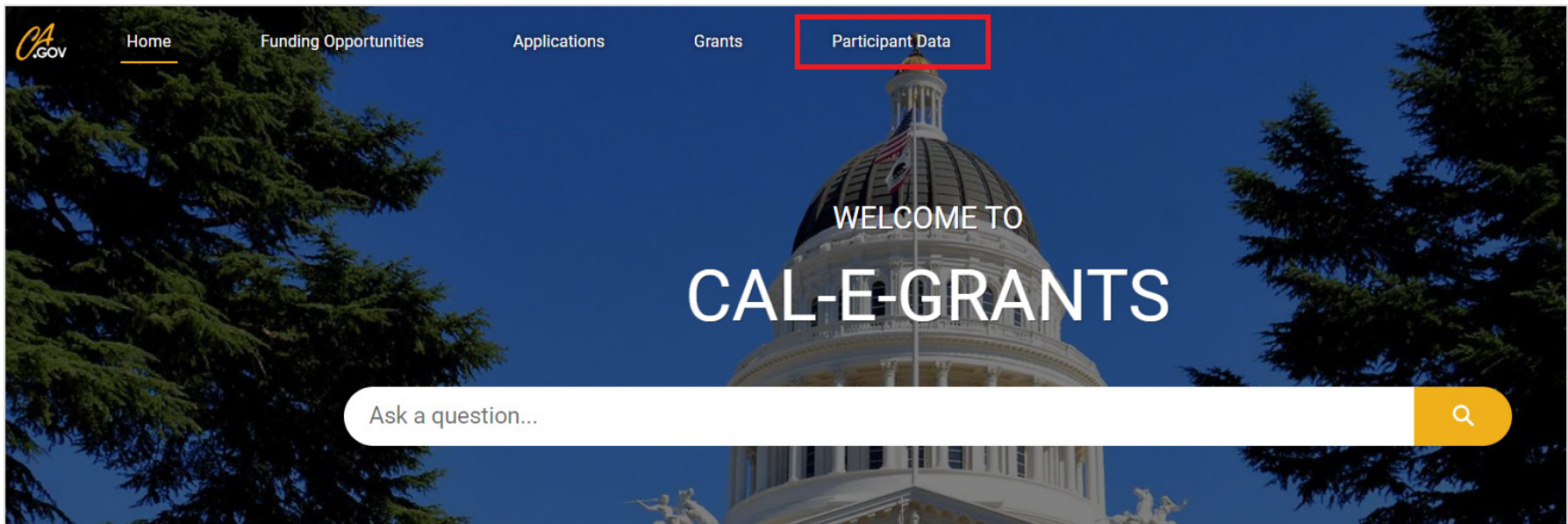
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Participant Data can be uploaded or added manually to Cal-E-Grants once logged into the system. To manually enter data, follow the steps outlined below.

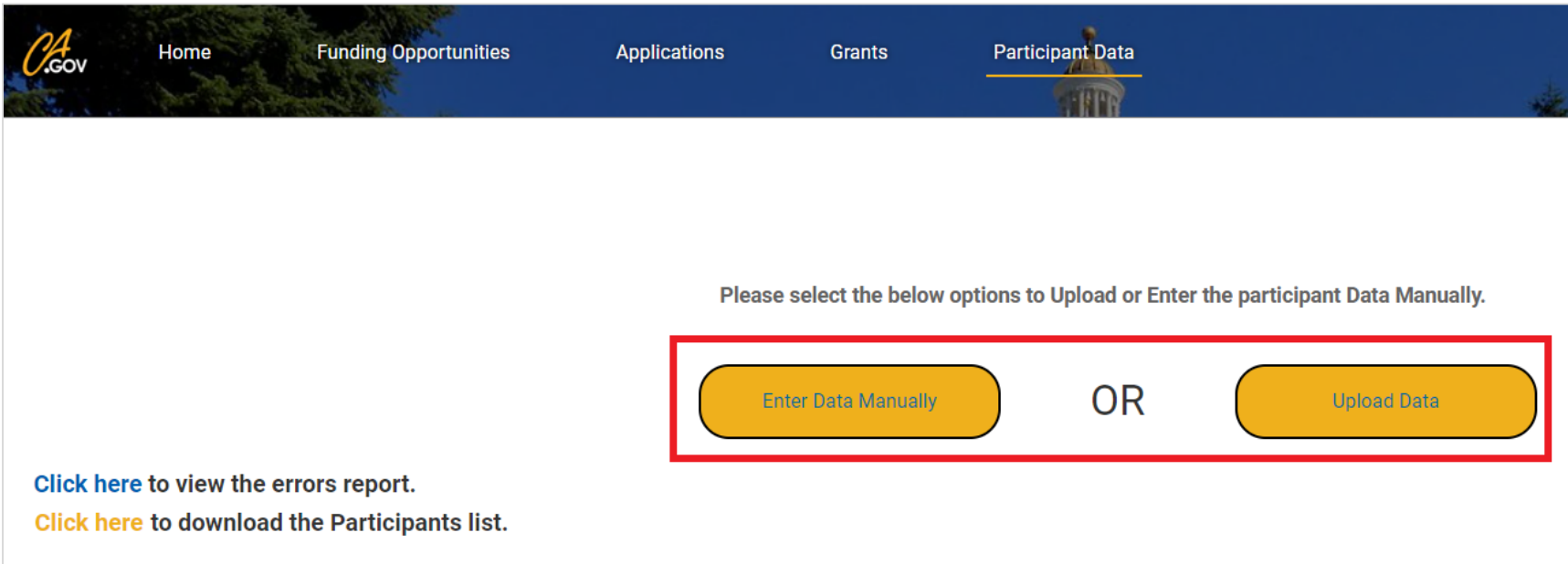
ACCESSING PARTICIPANT DATA: MANUAL ENTRY

Access via the Participant Data Tab

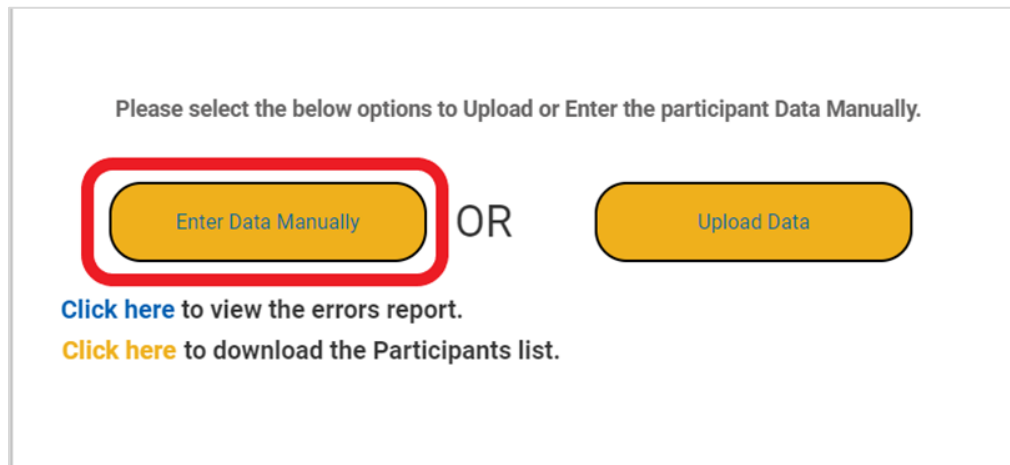
1. Select the **Participant Data** tab at the top of the Cal-E-Grants landing page.



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




2. Select the **Enter Data Manually** button.




3. Fill in all required fields (indicated with a red asterisk [*]) of the **Enter Data Manually** popup window.


Enter Data Manually

* Grant
 

* First Name

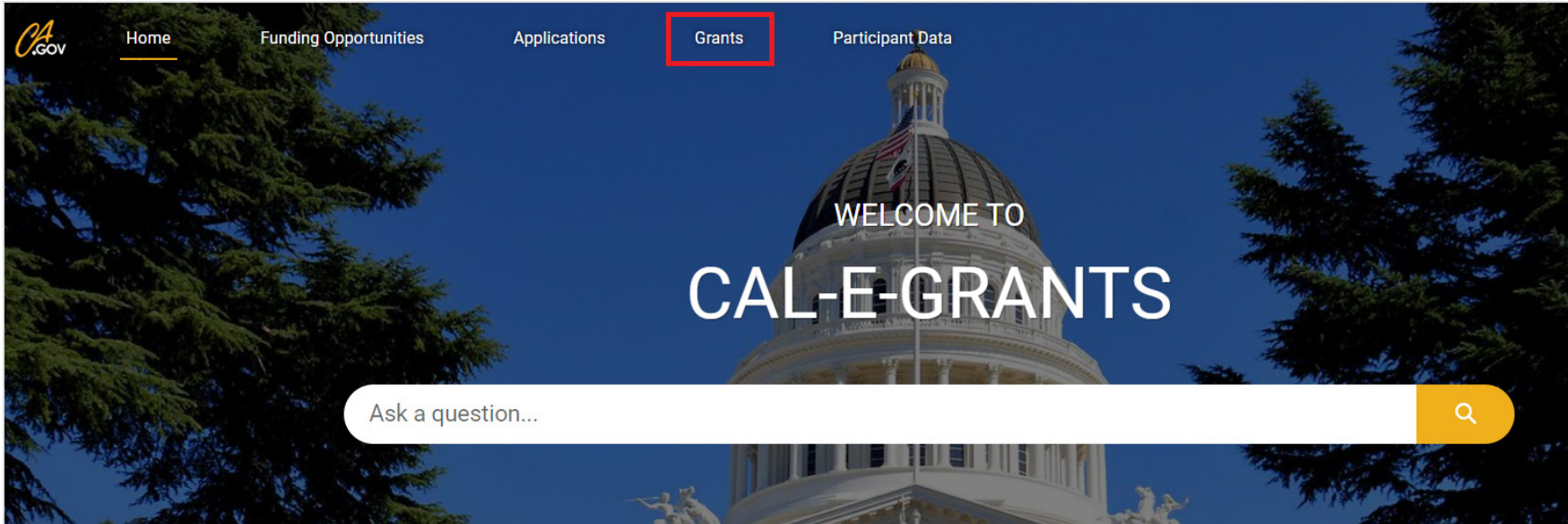
* Last Name

* Date of Birth
 

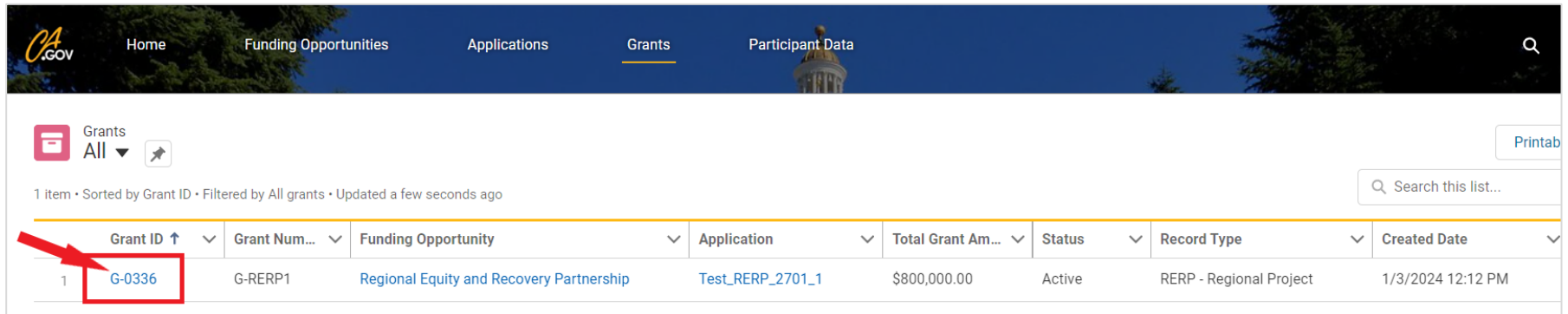
* Do you have SSN?
 

Access via Grants Tab

1. Select the **Grants** tab at the top of the Cal-E-Grants landing page.



2. Select the **Grant ID** link.




The screenshot shows the Grants page. The navigation bar is the same as in the previous image. Below the navigation bar, there is a section for Grants. It includes a "Grants All" filter, a "Printable" button, and a search bar. Below this is 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 is highlighted, and the "Grant ID" column is highlighted with a red box. A red arrow points to the "G-0336" link in the first row.

Grant ID	Grant Num...	Funding Opportunity	Application	Total Grant Am...	Status	Record Type	Created Date
1	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. Select the drop-down arrow and then **New Participant Data** on the right-hand side of the Grant page.

Grant G-0336

+ Follow Activate Grant New Modification Request New In 

Grant Name	Project Period	Total Grant Amount	Adjusted Grant Amount	Total Invoiced Amount
Test_RERP_2701_1	1/1/2023 - 12/31/2025	\$800,000.00	\$800,000.00	

New Report

New Participant Data

Active

Closed

Details Budget Allocation Modification Requests Invoices Progress Reports Documents Participant Data

4. Select the **Enter Data Manually** button from the popup window.

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. Fill in all required fields of the **Enter Data Manually** form that appears.

Enter Data Manually

* Grant

* First Name

* Last Name

* Date of Birth

* Do you have SSN?

MANUAL ENTRY OF PARTICIPANT DATA

1. Fill in all required fields (indicated with a red asterisk [*]) on the **Enter Data Manually** form. Select **Save** to submit. If **YES** is selected for “Do you have SSN?” a required **Social Security Number** field will appear.

Enter Data Manually

* Grant
G-0336

* First Name
John

* Last Name
Doe

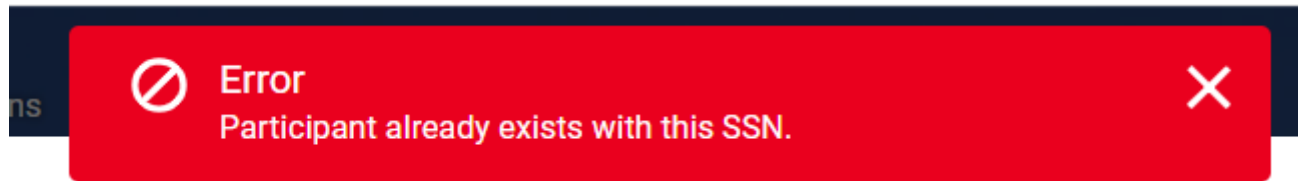
* Date of Birth
Jul 27, 1978

* Do you have SSN?
Yes

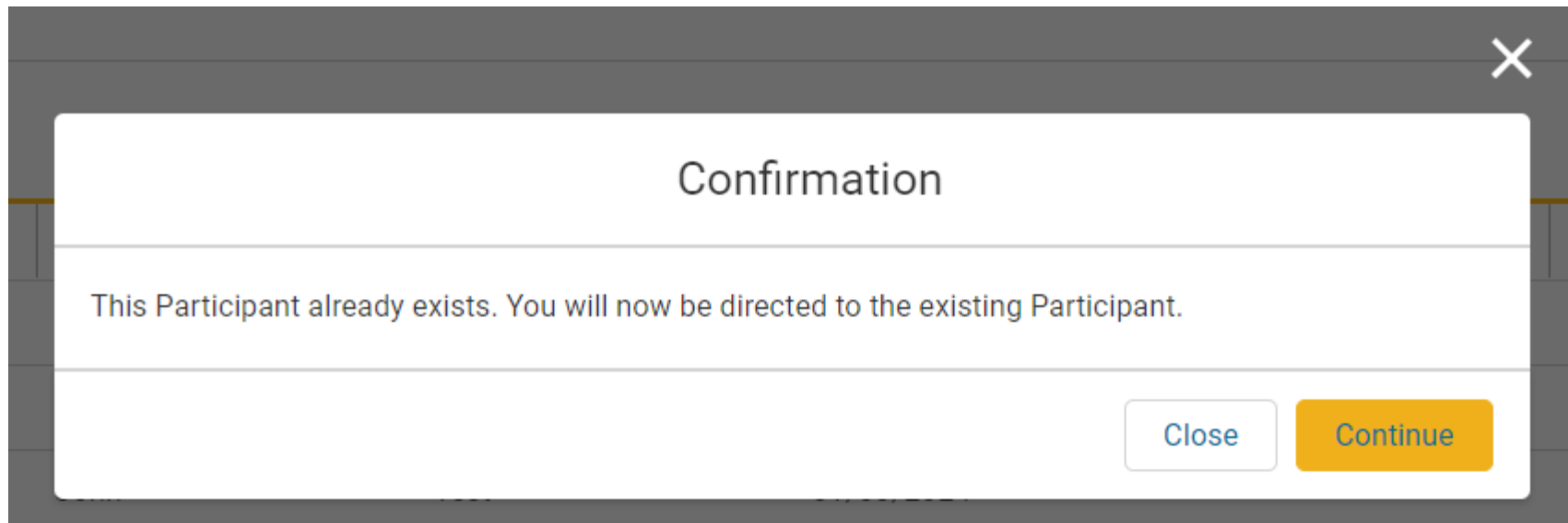
* Social Security Number
112233445

Close Save

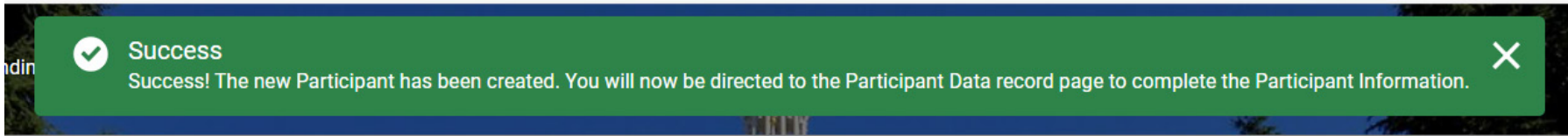
Three potential scenarios will occur once the **Save** button is selected:



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.



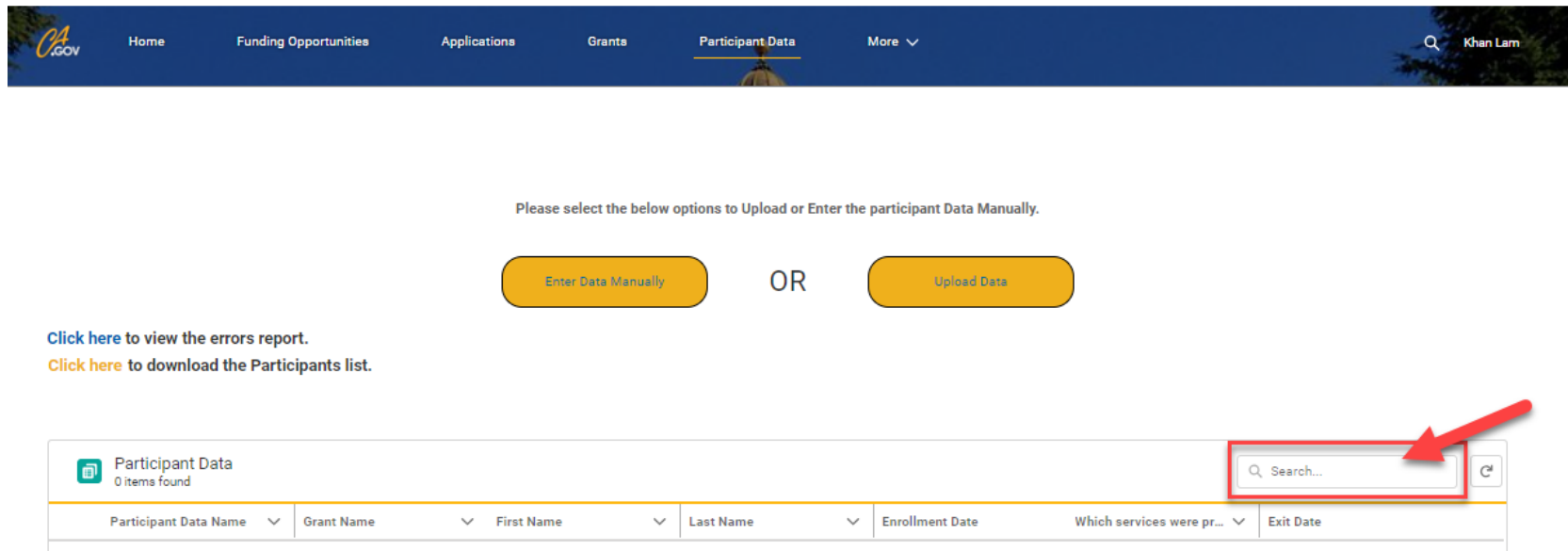
If the **participant record matches one that is already in the system** (Name, SSN, Date of Birth ALL match), a popup will appear and the system will re-direct to the existing participant.



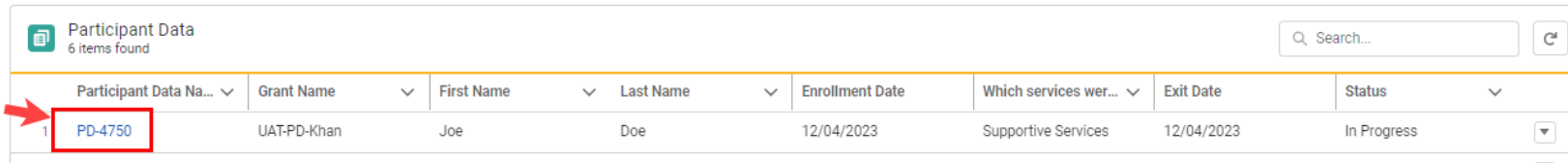
If the **data is accepted by the system** a *Success* banner will appear, and the system will re-direct to the new **Participant Data** page.

VIEWING THE PARTICIPANT DATA DETAIL PAGE

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



1. 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

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



Participant Data
janetest01022004

Grant Name: PD UAT Susie Test 1
Grant: G-0450
Lead Agency Applicant Name: CWDB

Note: The naming convention will follow the format:

First Name + Last Name + Date of Birth (MM/DD/YYYY) – i.e., Jane + Test + 01/02/2004 = janetest01022004

2. Fill in all necessary fields (*) for the participant.

The screenshot shows a form titled "Participant Information" with a "Cancel" button and "Submit Updates" and "Final Submission" buttons. The form is divided into two columns. The left column contains: First Name (Joe), Date Of Birth (12/4/2020), Middle Name (empty), Address Line 2 (empty), State (CA), Gender (--None--), and Sexual Orientation (--None--). The right column contains: Last Name (Doe), Social Security Number (***-**-7777), Address Line 1 (empty), City (empty), Zip Code (empty), Transgender / Gender Nonconforming (--None--), and Select Race / Ethnicity. The ethnicity section has an "Available" list (American Indian / Alaska Native, Asian, Black / African American, Hispanic / Latinx) and a "Chosen" list (empty).

Note: Hover over help bubbles (i) to get more details on what information is being requested.

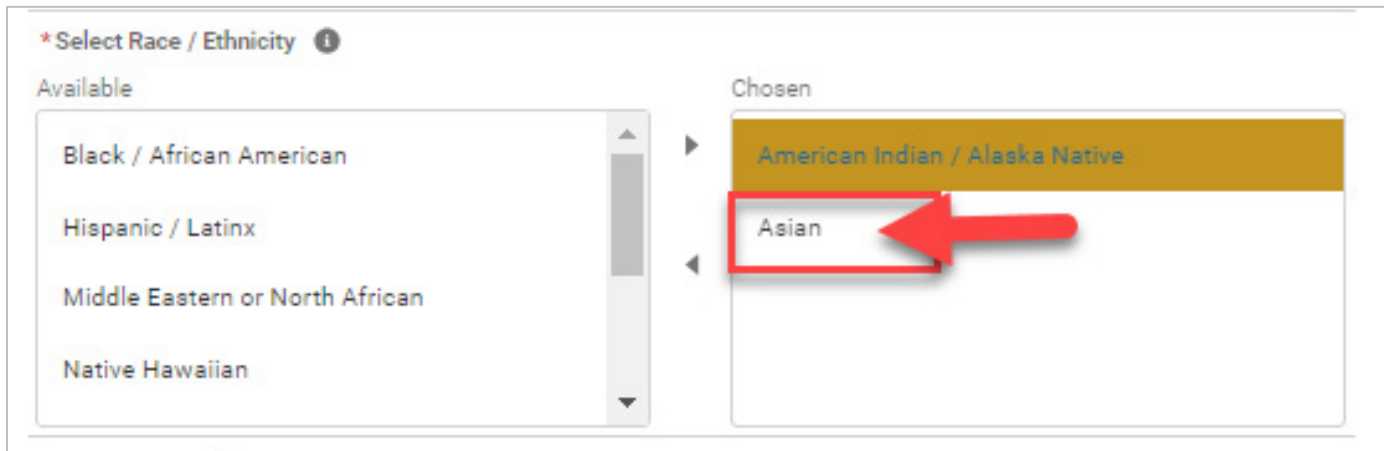
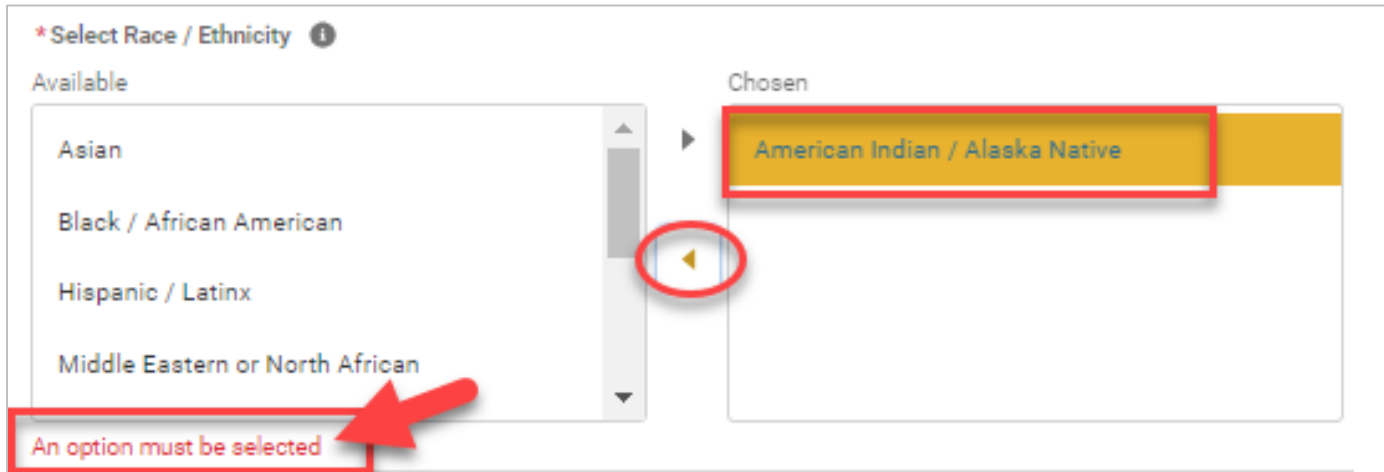
This close-up shows three fields: "* City", "* Zip Code", and "* Transgender / Gender Nonconforming". A blue help bubble with the text "Whether or not the Participant identifies as transgender." points to the help bubble (i) next to the "* Transgender / Gender Nonconforming" field. A red arrow also points to this help bubble. The dropdown menu for the transgender field is currently set to "--None--".

3. Make a selection for the **Race/Ethnicity** field. Selecting a choice will highlight it on the *Available* list. Then, select the forward arrow to move the highlighted word(s) to the *Chosen* box.

* Select Race / Ethnicity ⓘ

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

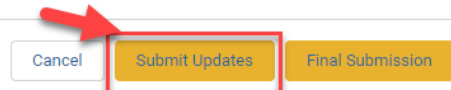
Note: If a selection needs to be removed from the **Chosen** box, select the item, then select the back arrow.



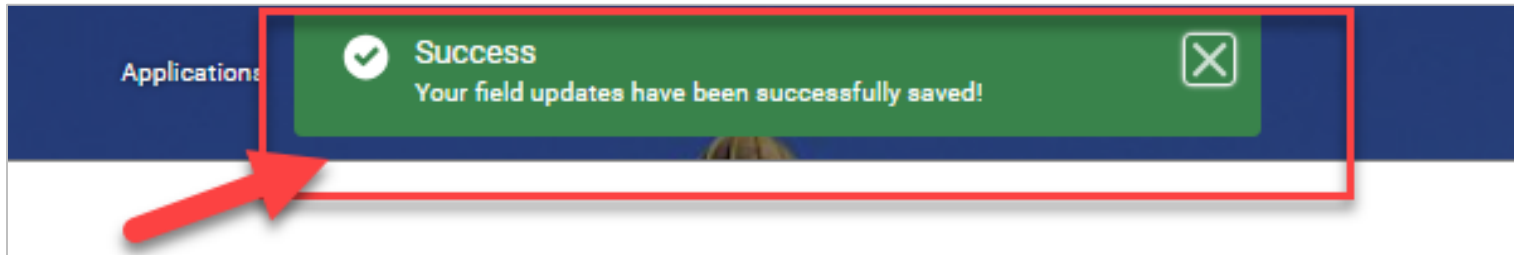
Note: Since this is a required field, an option must be selected. The correct selection must be moved to the **Chosen** box before the incorrect option can be removed.

4. Select **Submit Updates** to save what has been entered.

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.

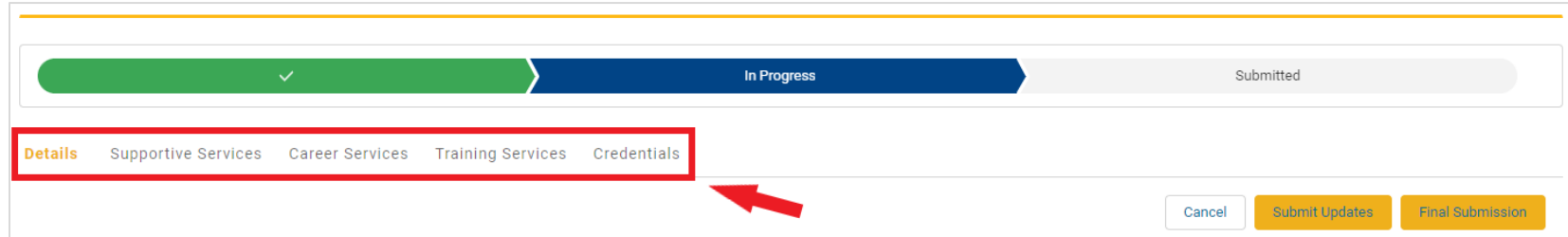


Note: If all data is accepted and saved, a Success message will appear at the top of the screen.



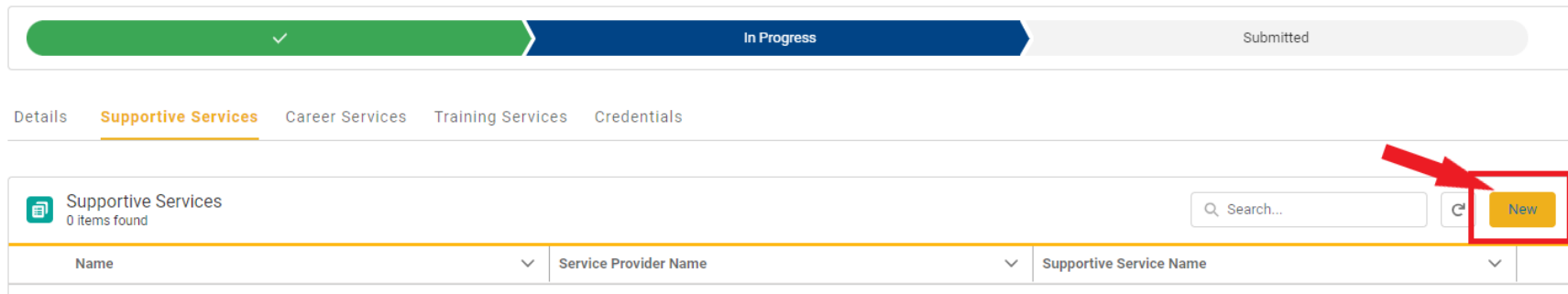
ADDING SERVICES: MANUAL ENTRY

Different service tabs can be accessed at the top of the **Details** page after all required participant information has been entered.



The screenshot shows a progress bar at the top with three segments: a green segment with a checkmark, a blue segment labeled 'In Progress', and a grey segment labeled 'Submitted'. Below the progress bar is a navigation menu with five tabs: 'Details', 'Supportive Services', 'Career Services', 'Training Services', and 'Credentials'. The 'Details' tab is highlighted with a red box, and a red arrow points to it from the right. At the bottom right of the navigation area are three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'.

1. Select the **New** button on the right-hand side of each service tab to add services as needed.



The screenshot shows the 'Supportive Services' tab selected in the navigation menu. The progress bar at the top is the same as in the previous image. Below the navigation menu, the 'Supportive Services' section is displayed. It includes a search bar with the text 'Search...', a refresh icon, and a yellow 'New' button. The 'New' button is highlighted with a red box, and a red arrow points to it from the left. Below the search bar is a table with three columns: 'Name', 'Service Provider Name', and 'Supportive Service Name'. Each column has a dropdown arrow next to it.

2. Fill in all the required fields (*) of the new form that appears.

Note: Be sure to select the **Save** button to complete the process of adding services.

New Supportive Services


* = Required Information

Information

* Service Provider Name ⓘ <input type="text"/> Complete this field.	* Supportive Service Name ⓘ <input type="text"/> Complete this field.
* Service Start Date ⓘ <input type="text"/> Complete this field.	* Supportive Service Status ⓘ --None-- Complete this field.

Supportive Service Type Information

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



Note: This process can be repeated to the other tabs: Supportive Services, Career Services, Training Services, and Credentials, as needed.

Once service data has been saved, the required fields will no longer be editable.

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"/>
---	---

Supportive Service Type Information

<p>* Supportive Service Name ⓘ</p> <input type="text" value="Housing Assi"/> <p>Read-only field.</p>	<p>* Supportive Service Type ⓘ</p> <input type="text"/>
--	---

⊘ We hit a snag. ✕

Review the following fields

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

⊘

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

UPDATING SERVICES

1. Navigate to the appropriate Service tab within a participant's entry to update a service manually.

The screenshot shows a progress bar at the top with three stages: a green bar with a checkmark, a blue bar labeled 'In Progress', and a grey bar labeled 'Submitted'. Below the progress bar is a navigation menu with tabs: 'Details', 'Supportive Services', 'Career Services', 'Training Services' (highlighted with a red box), 'Credentials', and 'Additional Questions'. On the right side of the page are three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'. The main content area is titled 'Participant Information' and contains several input fields: 'First Name' (Bernie), 'Last Name' (Test), 'Date Of Birth' (11/11/2001), 'Middle Name', 'Social Security Number', and 'Address Line 1' (321 Test).

2. Once on the appropriate Service tab, select the service name to open the details of the entry.


Details Supportive Services Career Services **Training Services** Credentials Additional Questions

[O*Net Code Lookup Tool Here](#)

Training Services 1 items found		Search...		New		
Name	Training Provider Name	Training Course Name	Training Course Status	Training Start Date	Training Completion / With...	Training Type
1	TS-4244	ABC Trainer	Basic Skills Training	In Progress	12/16/2024	Occupational Skill Training (OST)

2. Select the pencil icon to the right of the field to change the **status** of a service from *In Progress* to *Completed* or *Withdrawn*.

Note: A date is required when service is completed or withdrawn. It can be inputted above the status line.

 Training Services
TS-4244

[Edit](#)

Training Course Name
Basic Skills Training

Details

Information

Name	TS-4244	Training Course Name ⓘ	Basic Skills Training
Training Provider Name ⓘ	ABC Trainer	Training Completion / Withdraw Date ⓘ	
Training Start Date ⓘ	12/16/2024	Training Course Status ⓘ	In Progress
Occupation of Training (Description) ⓘ	Front Desk Attendant	Reason for Withdrawing from Training ⓘ	
Occupation (O*NET-SOC code) ⓘ			

3. Select the **Save** button at the bottom, once the status has been changed and the date added.

Details

* = Required Information

Information

Name
TS-4244

* Training Provider Name ⓘ
ABC Trainer

* Training Start Date ⓘ
12/16/2024

* Occupation of Training (Description) ⓘ
Front Desk Attendant

Occupation (O*NET-SOC code) ⓘ

* Training Course Name ⓘ
Basic Skills Training

Training Completion / Withdraw Date ⓘ
12/20/2024

* Training Course Status ⓘ
Completed

Reason for Withdrawing from Training ⓘ

Training Type Information

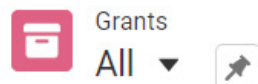
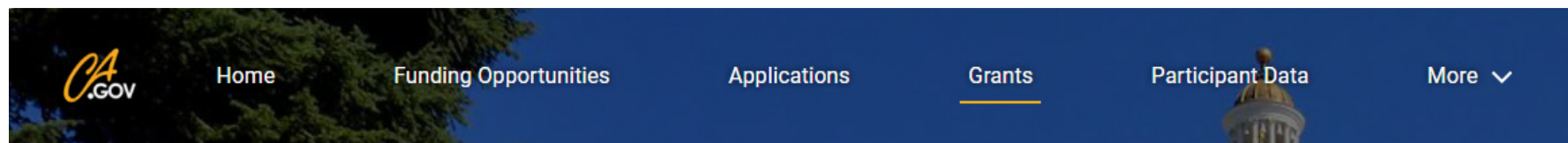
* Training Type ⓘ

Cancel Save

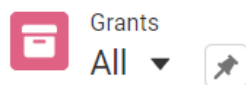
FINAL SUBMISSION

Access via Grants Tab (Recommended)

1. Once participants have exited a program and are no longer receiving services, participant entries can be closed out using the bulk Final Submission function under the **Grants** tab in Cal-E-Grants.



2. Select the appropriate **Grant ID**.



5 items • Sorted by Grant ID • Filtered by All grants • Updated 5 minutes ago

	Grant ID ↓	Grant Nu...	Funding Opportunity	Application	Total G...
1	G-0451	0000	High Road Training Partnership: Resilient Workforce Program (RWP)	PD UAT Susie Test 2	\$100.00
2	G-0450		AB 628 Breaking Barriers to Employment Initiative 2.0	PD UAT Susie Test 1	\$100.00

3. Select the **Participant Data** tab and then the **Bulk Submit** button.

Progress indicator: Active | Closed

Navigation: Details | Subrecipients | Budget Allocation | Modification Requests | Invoices | Progress Reports | **Participant Data** | Reports | Documents

Participant Data
4 items found

Search: ↻ **Bulk Submit**

Participant D...	Grant Name	First Name	Last Name	Enrollment Date	Which servic...	Exit Date	Status	Created By	LastModified...	
1 PD-25179	PD UAT Susie Test 1	Bernie	Test	11/04/2024	Supportive Services; Training Services	12/20/2024	In Progress	CWDB	Susie Gates	▼
2 PD-24990	PD UAT Susie Test 1	Test	Participant	12/04/2024	Supportive Services; Training Services	12/18/2024	Submitted	CWDB	Susie Gates	▼
3 PD-24963	PD UAT Susie Test 1	Jane	Test	11/04/2024	Career Services	12/04/2024	Submitted	CWDB	Susie Gates	▼
4 PD-24964	PD UAT Susie Test 1	Joe	Test	11/04/2024	Career Services		In Progress	CWDB	Susie Gates	▼

4. A popup window will appear listing the participants that are eligible to be submitted. Select the check boxes to the left of participant(s) to be submitted, then select the **Submit** button.

Project Period: 5/1/2024 - 3/31/2026
Total Grant Amount: \$100.00
Adjusted Grant Amount: \$100.00
Total Invoiced Amount: \$100.00

Bulk Submit Participant Data

Participant data can only be submitted once it is completed. Only entries that are eligible for submission are displayed. Click [here](#) for a reference guide.

WARNING: Once you select the 'Submit' button you will NOT be able to add additional data or services to the record(s). After 'Submission' the Participant Data becomes Read-Only.

<input checked="" type="checkbox"/>	Participant Data N... ▾	First Name ▾	Last Name ▾	Enrollment Date ▾	Which Services we... ▾	Exit Date ▾	Created By ▾
<input checked="" type="checkbox"/>	PD-24990	Test	Participant	Dec 3, 2024	Supportive Services; Training Services	Dec 17, 2024	CWDB

Cancel Submit

Note: Participant data can only be submitted once it is completed. Only entries eligible for submission are displayed. Once the **Final Submit** button is selected, grantees will NOT be able to add additional data or services to the record(s). After submission, the Participant Data becomes Read-Only.

The participant's status will change from *In Progress* to *Submitted* on the Participant Data landing page.

Participant Data
4 items found

Search... Bulk Submit

Participant D...	Grant Name	First Name	Last Name	Enrollment Date	Which servic...	Exit Date	Status	Created By	LastModified...	
1 PD-25179	PD UAT Susie Test 1	Bernie	Test	11/04/2024	Supportive Services		In Progress	CWDB	Susie Gates	▼
2 PD-24990	PD UAT Susie Test 1	Test	Participant	12/04/2024	Supportive Services; Training Services	12/18/2024	Submitted	CWDB	Susie Gates	▼
3 PD-24963	PD UAT Susie Test 1	Jane	Test	11/04/2024	Career Services	12/04/2024	Submitted	CWDB	Susie Gates	▼
4 PD-24964	PD UAT Susie Test 1	Joe	Test	11/04/2024	Career Services		In Progress	CWDB	Susie Gates	▼

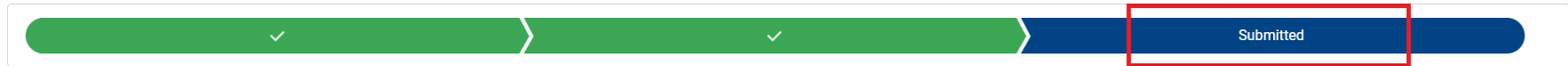
Access via Participant Data Detail Page

1. Alternatively, when a grantee is done providing services to a participant, the data can be submitted individually by selecting the **Final Submission** button within the participant's entry. This will likely be toward the end of the grant term.

The screenshot displays the 'Participant Data Detail Page' interface. At the top, a progress bar shows three stages: 'Completed' (green), 'In Progress' (blue), and 'Submitted' (grey). Below the progress bar, a navigation menu includes 'Details' (highlighted), 'Supportive Services', 'Career Services', 'Training Services', and 'Credentials'. At the bottom right of the 'Details' tab, three buttons are visible: 'Cancel', 'Submit Updates', and 'Final Submission'. A red box highlights the 'Final Submission' button, with a red arrow pointing to it from the right. A red circle with the number '1' is positioned above the top section. Below the '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.' At the bottom right of this section, the same three buttons are shown, with the 'Final Submission' button again highlighted by a red box and a red arrow pointing to it from the right. A red circle with the number '2' is positioned above this bottom section.

Note: The 'Final Submission' button is located on the **Details** tab at both the top and bottom of the screen. Once the **Final Submission** button is selected, grantees will NOT be able to add additional data or services to the record(s). After submission, the Participant Data becomes Read-Only.

The status of a participant's data is indicated in the **Progress** ribbon located toward the top of each tab and on the **Participant Data** landing page under *Status*.



Participant Data
3 items found

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	Menethill				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