



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

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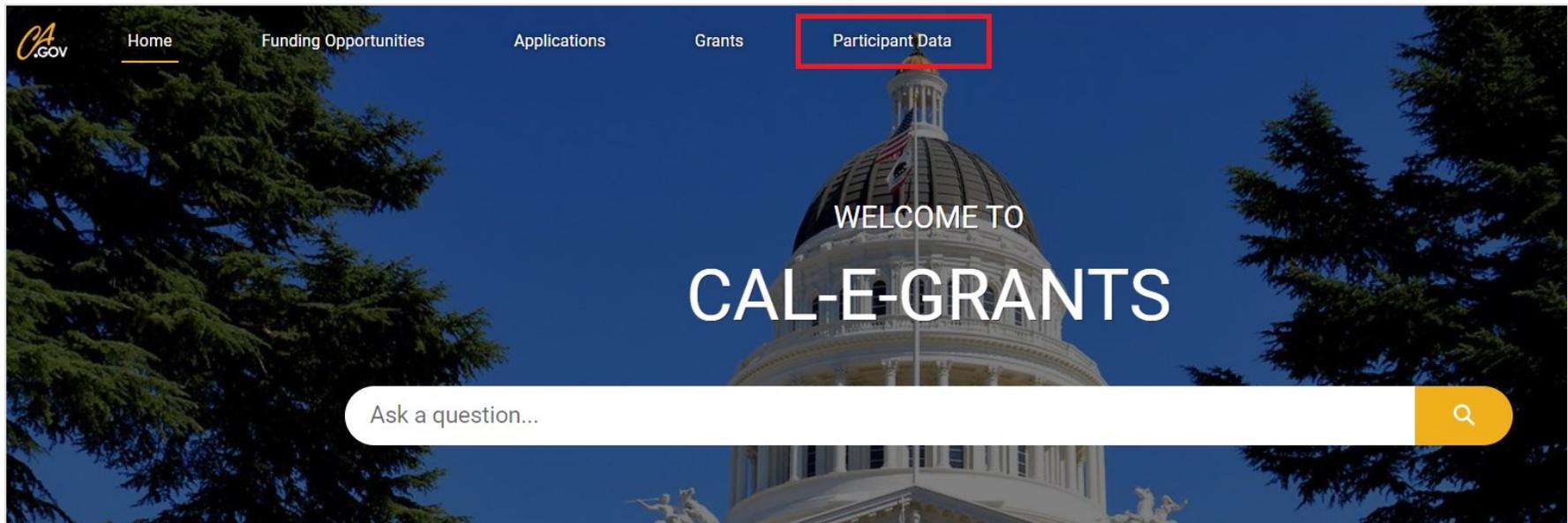
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Participant Data can be uploaded or added manually to Cal-E-Grants once logged into the system. To manually enter data, follow the steps outlined below.

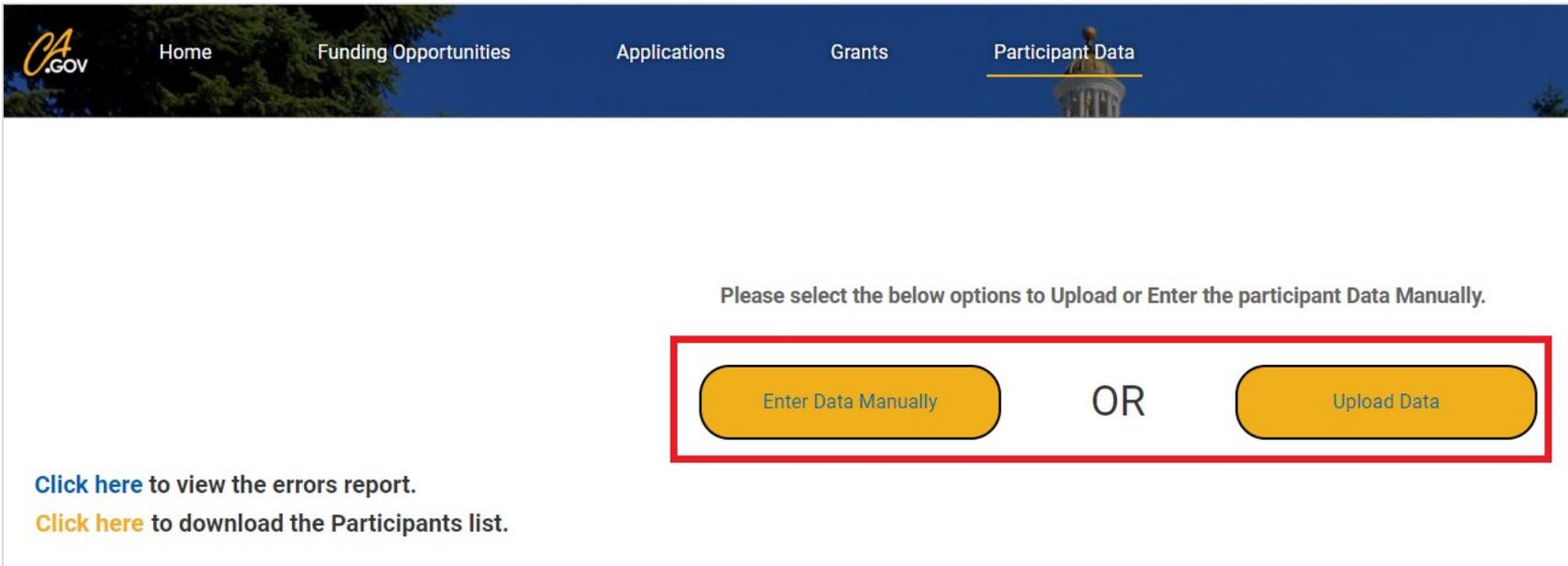
ACCESSING PARTICIPANT DATA: MANUAL ENTRY

Access via the Participant Data Tab

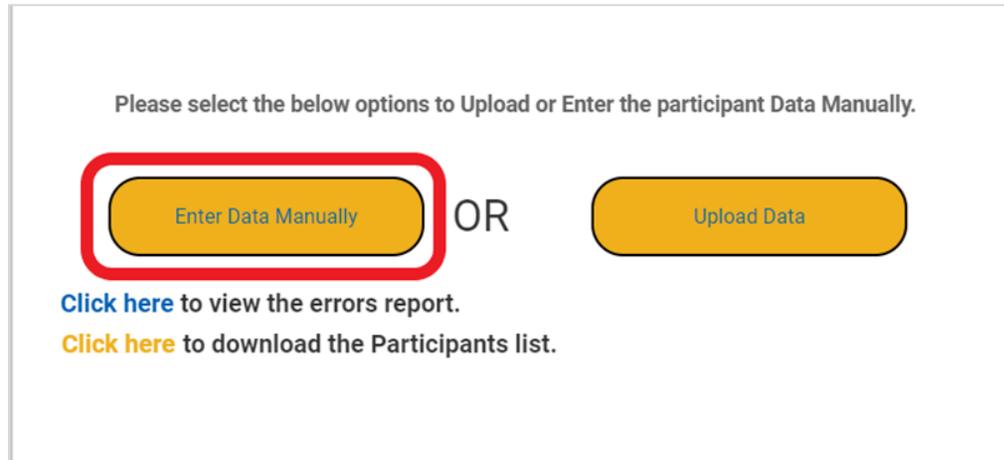
1. Select the **Participant Data** tab at the top of the Cal-E-Grants landing page.



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

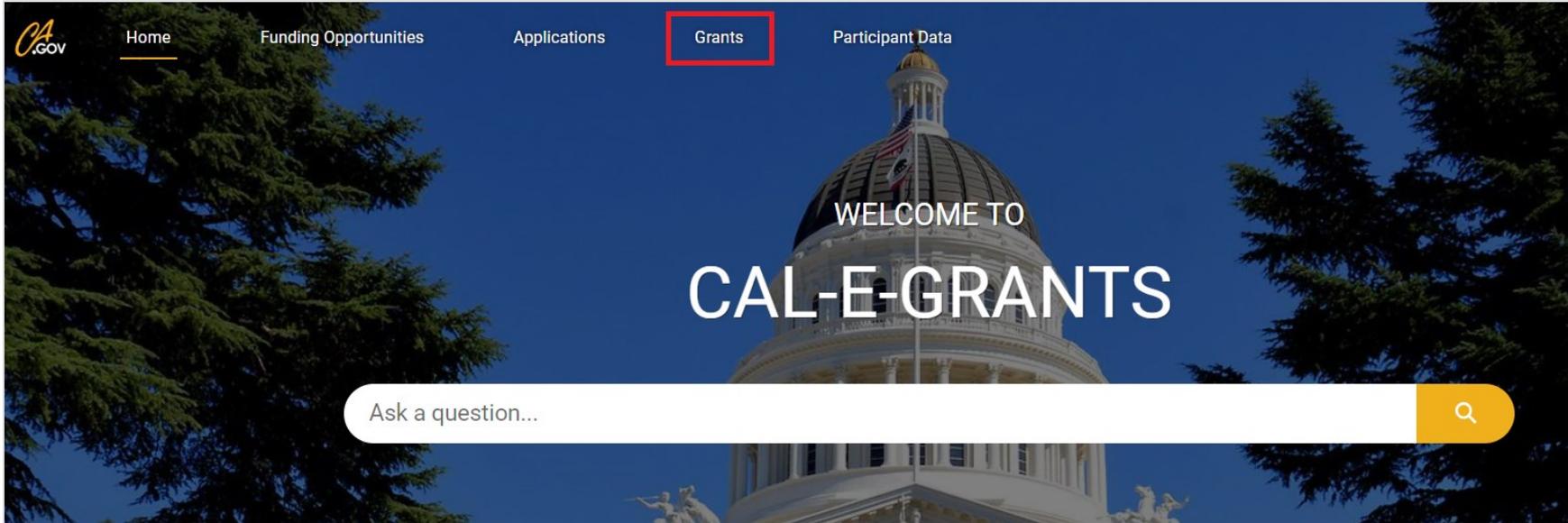
* Last Name

* Date of Birth
 

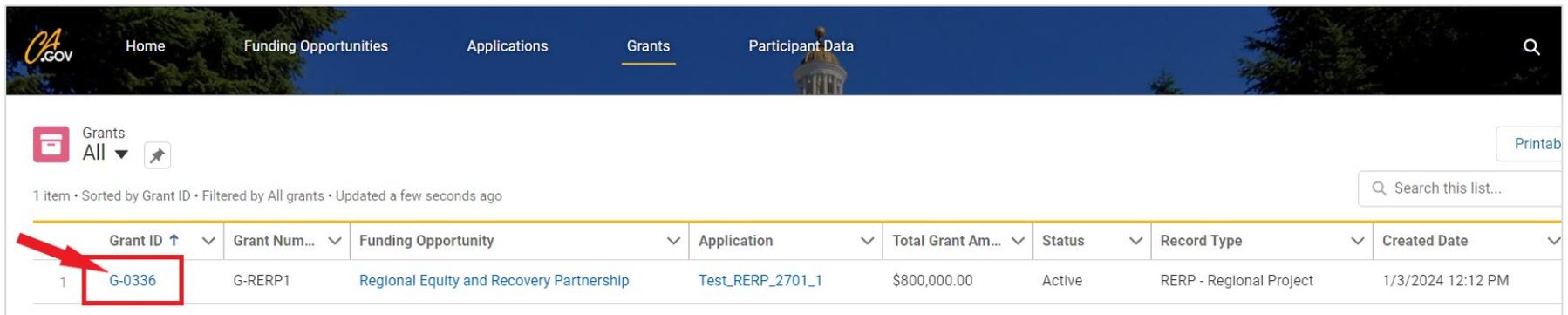
* Do you have SSN?
 

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 'Grants' tab is selected in the navigation bar. Below the navigation bar, there is a search bar and a 'Printable' button. The main content area displays a table of grants. The table has 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?

Close Save

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

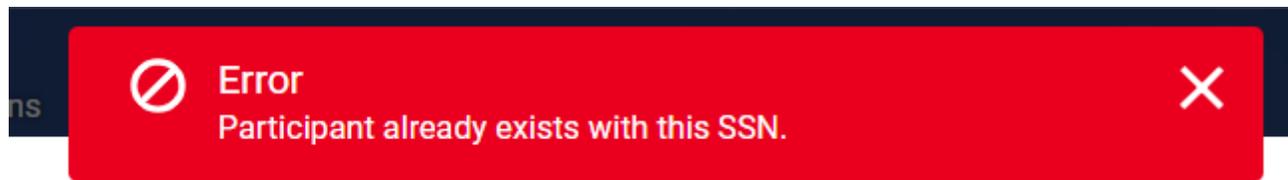
* Date of Birth
Jul 27, 1978

* Do you have SSN?
Yes

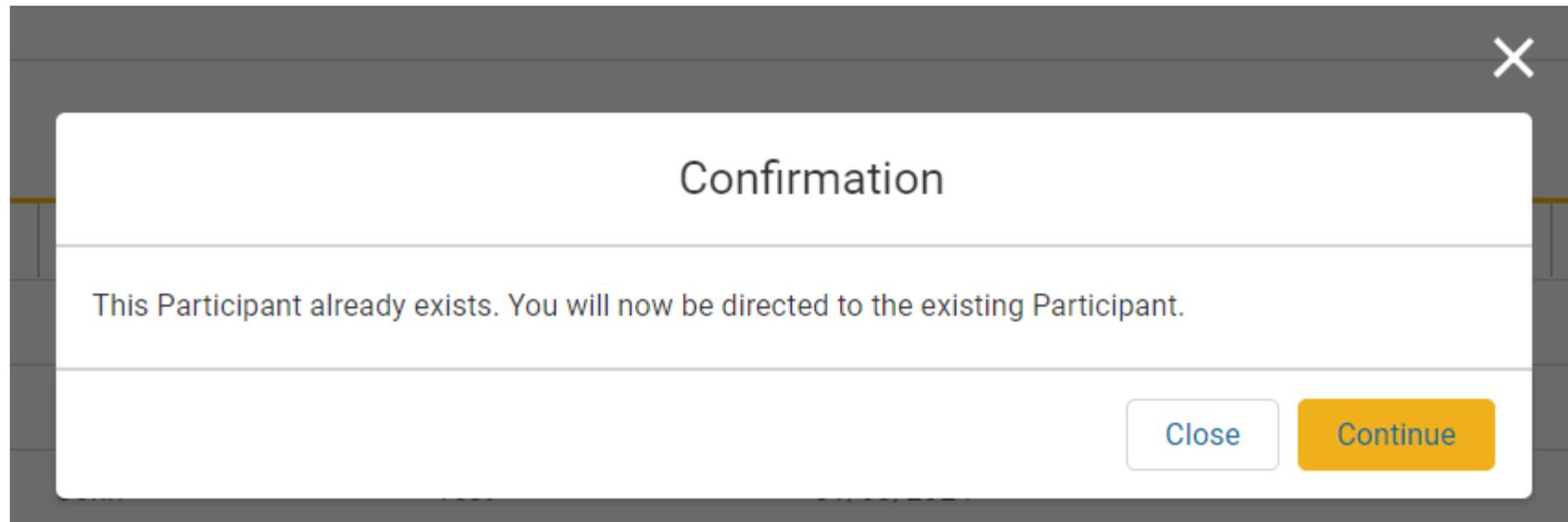
* Social Security Number
112233445

Close Save

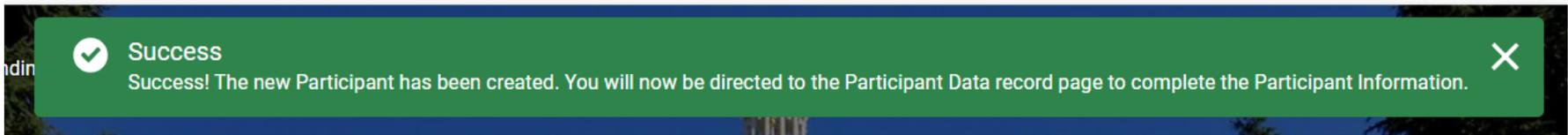
Three potential scenarios will occur once the **Save** button is selected:



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.



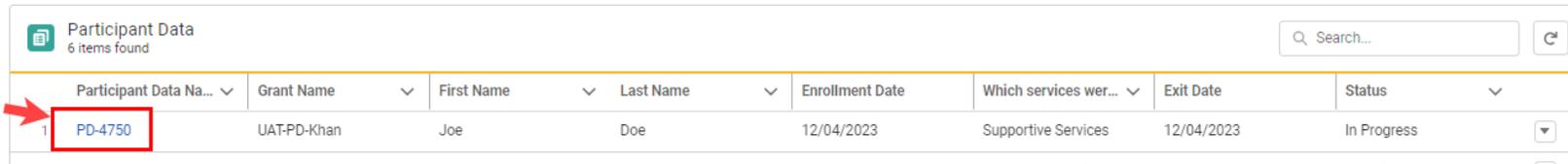
If the **data is accepted by the system** a *Success* banner will appear, and the system will re-direct to the new **Participant Data** page.

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.

A screenshot of a web application interface. At the top is a dark blue navigation bar with the "CA Gov" logo on the left and menu items: "Home", "Funding Opportunities", "Applications", "Grants", "Participant Data" (which is underlined), and "More" with a dropdown arrow. On the right of the navigation bar is a search icon and the name "Khan Lam". Below the navigation bar, the text "Please select the below options to Upload or Enter the participant Data Manually." is centered. Below this text are two yellow buttons: "Enter Data Manually" and "Upload Data", separated by the word "OR". Below the buttons are two links: "Click here to view the errors report." and "Click here to download the Participants list." Below the links is a table. The table has a header row with columns: "Participant Data Name", "Grant Name", "First Name", "Last Name", "Enrollment Date", "Which services were pr...", and "Exit Date". Above the table is a search bar with a magnifying glass icon, the text "Search...", and a clear button. A red arrow points to the search bar. The table currently shows "Participant Data" and "0 items found".

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.

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

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

* City [Empty]

* Zip Code [Empty]

* Transgender / Gender Nonconforming: --None--

Callout bubble: Whether or not the Participant identifies as transgender.

Red arrow points to the help bubble (i) next to the Transgender field.

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

American Indian / Alaska Native

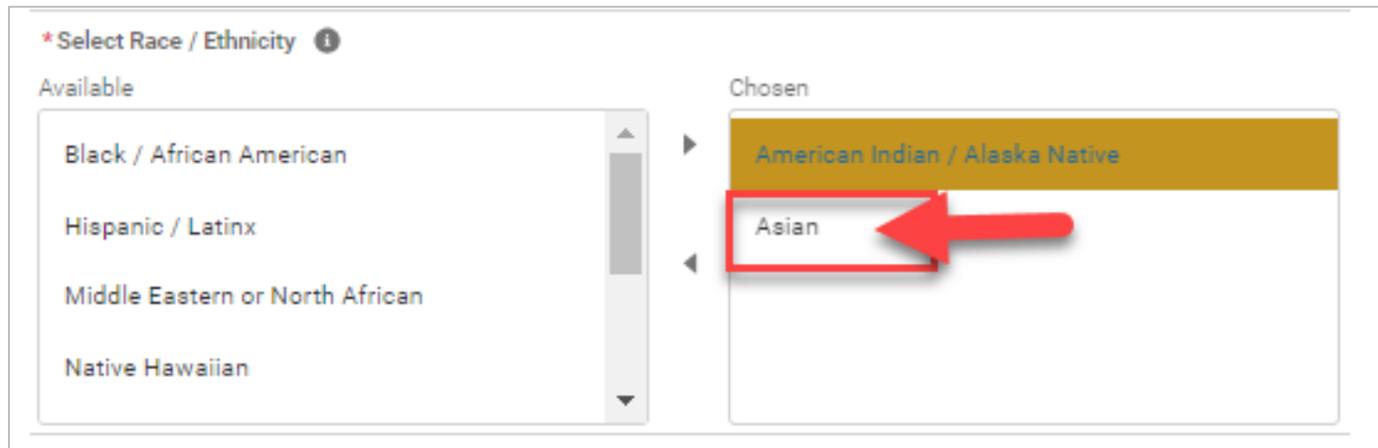
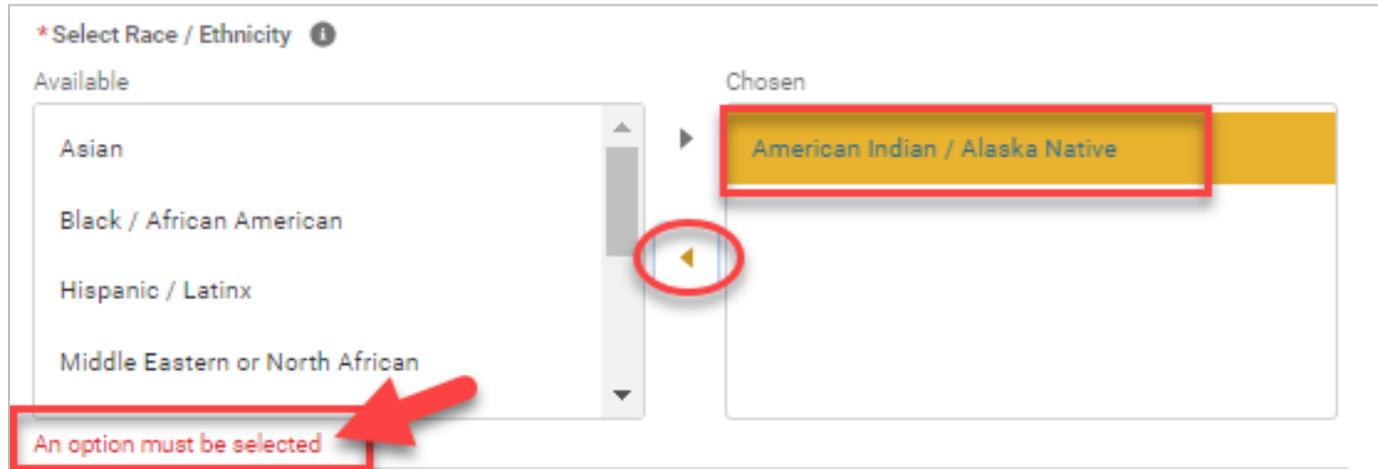
Asian

Black / African American

Hispanic / Latinx

Chosen

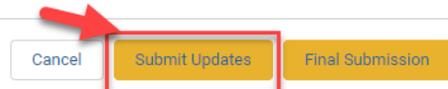
Note: If a selection needs to be removed from the **Chosen** box, select the item, then select the back arrow.



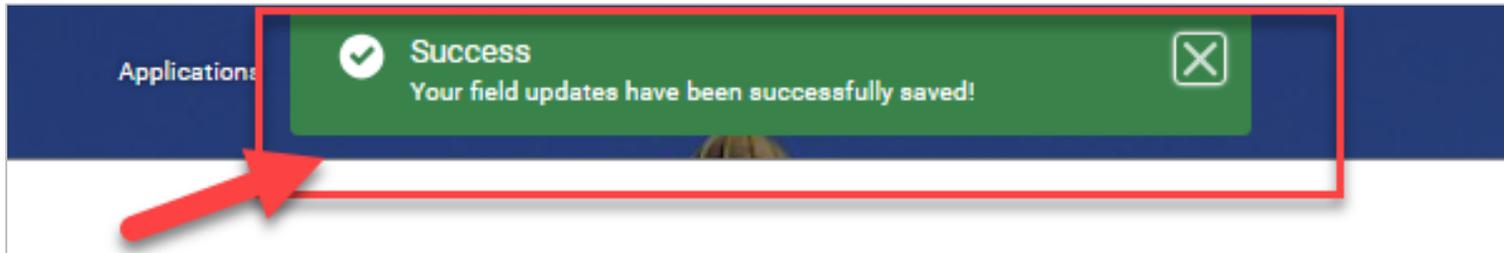
Note: Since this is a required field, an option must be selected. The correct selection must be moved to the **Chosen** box before the incorrect option can be removed.

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.

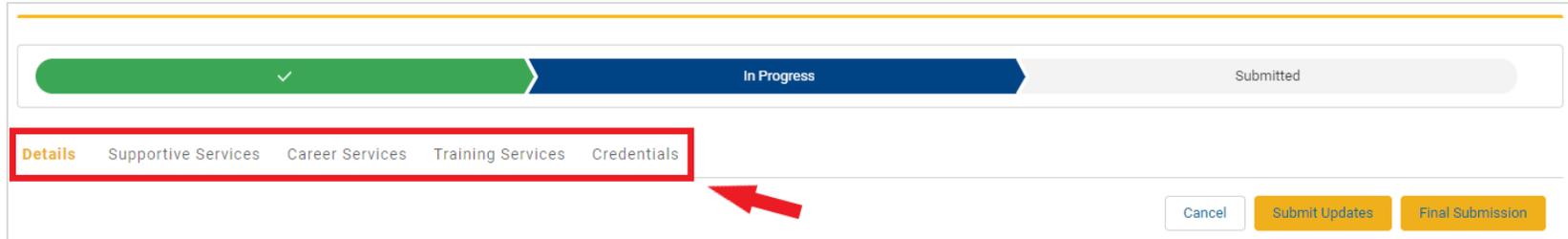


Note: If all data is accepted and saved, a Success message will appear at the top of the screen.



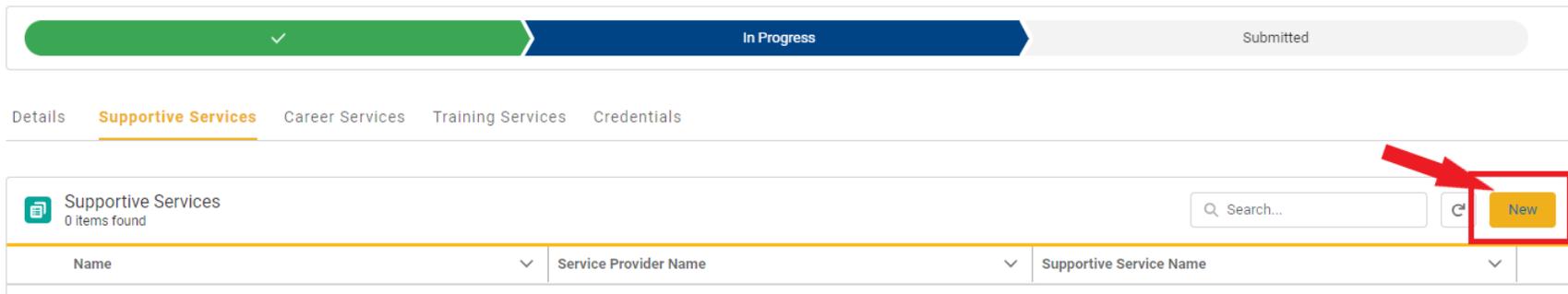
ADDING SERVICES: MANUAL ENTRY

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



A progress bar at the top shows 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 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. To the right of the tabs 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 'Supportive Services' tab is selected and highlighted in orange. The page shows a search bar with the text 'Supportive Services' and '0 items found'. To the right of the search bar is a refresh icon and a yellow 'New' button, which is highlighted with a red box and a red arrow pointing 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.

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

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 ⓘ

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

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 Type ⓘ</p> <input type="text" value="Housing Assistance"/> <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', 'Credentials', and 'Additional Questions'. The 'Training Services' tab is highlighted with a red box. To the right of the tabs are three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'. Below the tabs is a section titled 'Participant Information' with a dropdown arrow. It contains several input fields: 'First Name' (Bernie), 'Last Name' (Test), 'Date Of Birth' (11/11/2001), 'Social Security Number', 'Middle Name', 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 | | | | | | | |
|------------------------------------|------------------------|-----------------------|------------------------|---------------------|-------------------------------|-----------------------------------|--|
| 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 *Withdrew*.

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

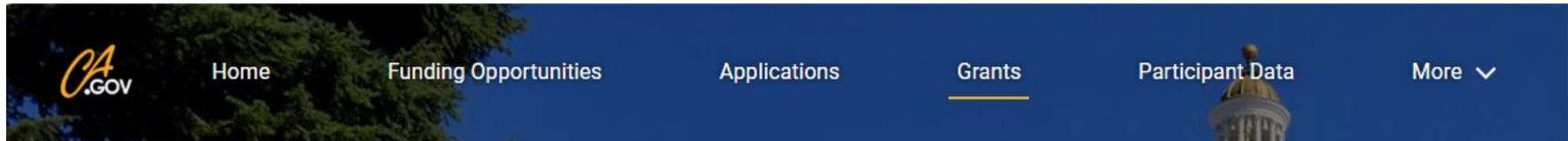
* Training Type ⓘ

Cancel Save

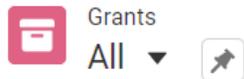
FINAL SUBMISSION

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 (blue arrow), Closed (grey arrow)

Navigation tabs: 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 |

Buttons: 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 |  |

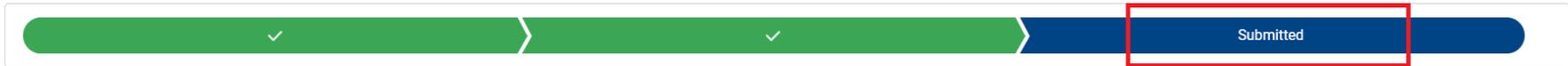
Access via Participant Data Detail Page

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', 'Supportive Services', 'Career Services', 'Training Services', and 'Credentials'. The 'Details' tab is active. At the bottom right of the top section, three buttons are visible: 'Cancel', 'Submit Updates', and 'Final Submission'. A red circle with the number '1' is positioned above the 'Final Submission' button, and a red arrow points to it. Below this, the 'Bottom of Details tab' section contains a red warning message: '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 ('Cancel', 'Submit Updates', 'Final Submission') are present. A red circle with the number '2' is positioned above the 'Final Submission' button, and a red arrow points to it.

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 ▾ |

SUMMARY OF STEPS

Life Cycle of a Participant in Cal-E-Grants

1. Manually enter (or upload) Participant Intake Information to enroll the participant.



2. Enter services provided in real-time, or at least every quarter, and update services as needed.



3. Enter credential information as needed.



4. Enter Exit Information, Milestones, and Post-Exit Outcomes upon completion.



5. Final Submit all participants by the end of the grant term.