



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

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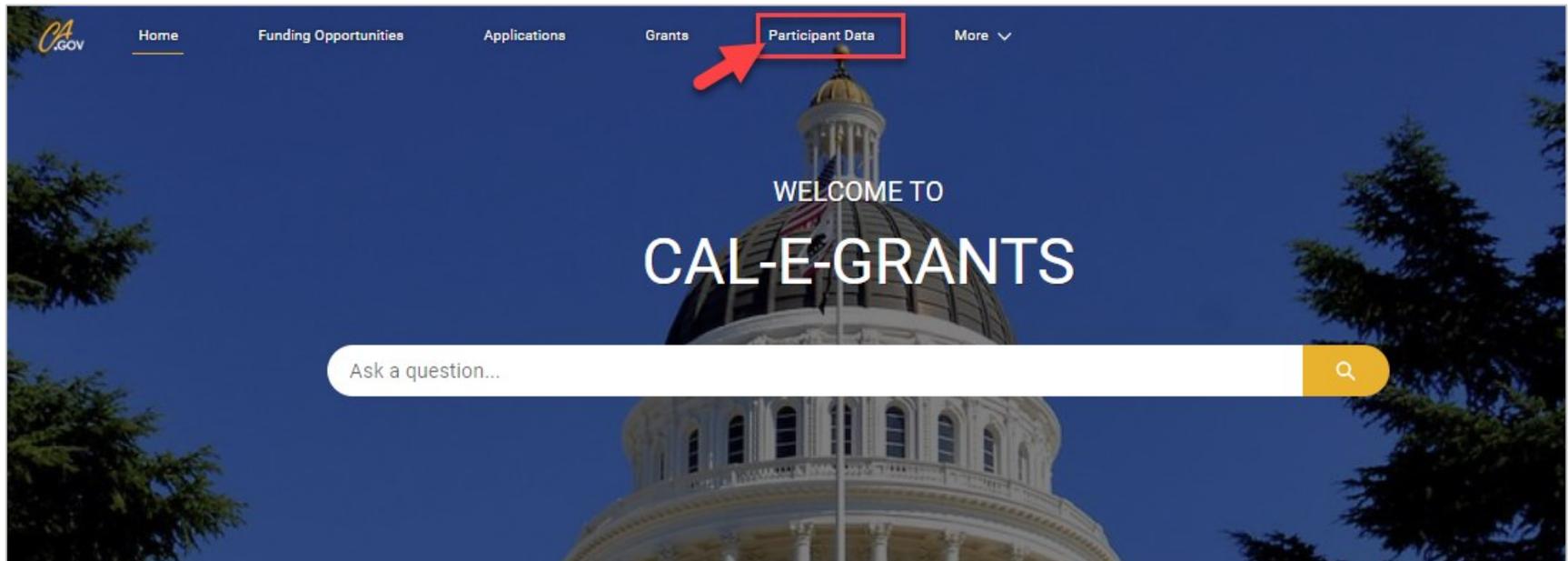
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Participant Data can be uploaded or added manually to Cal-E-Grants. To upload data, follow the steps outlined below.

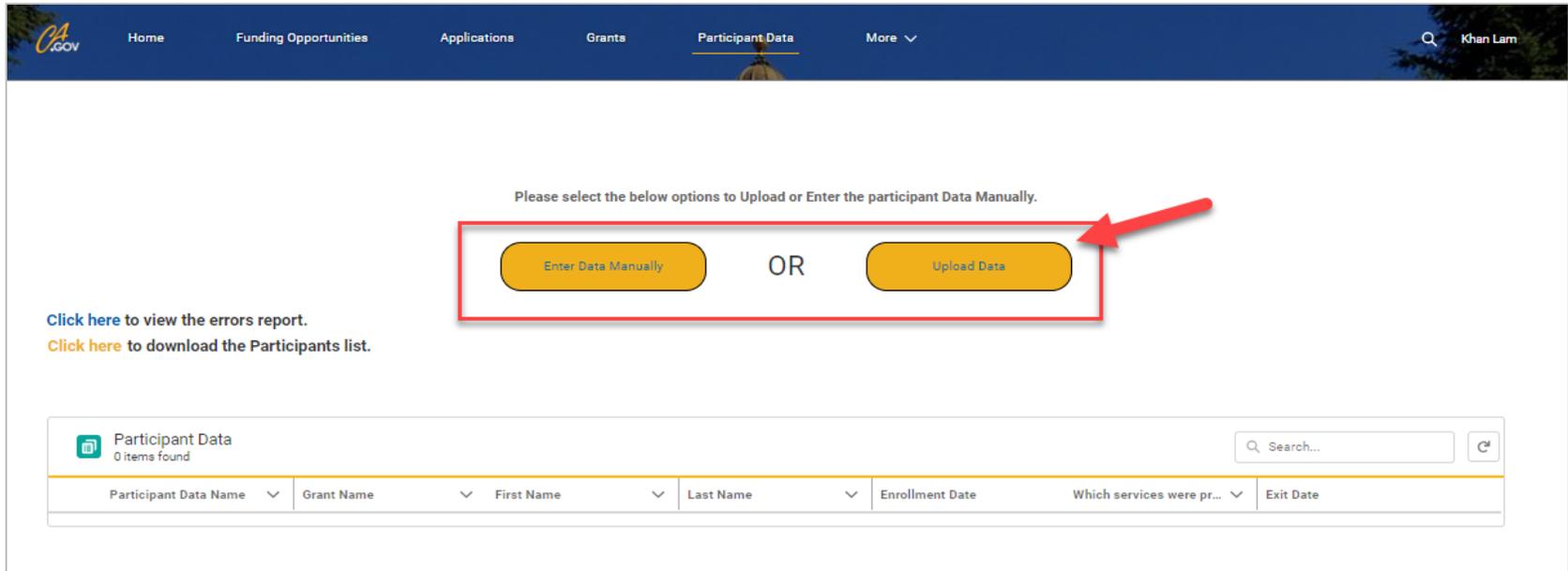
## ACCESSING PARTICIPANT DATA: UPLOAD PROCESS

### Access via the Participant Data Tab

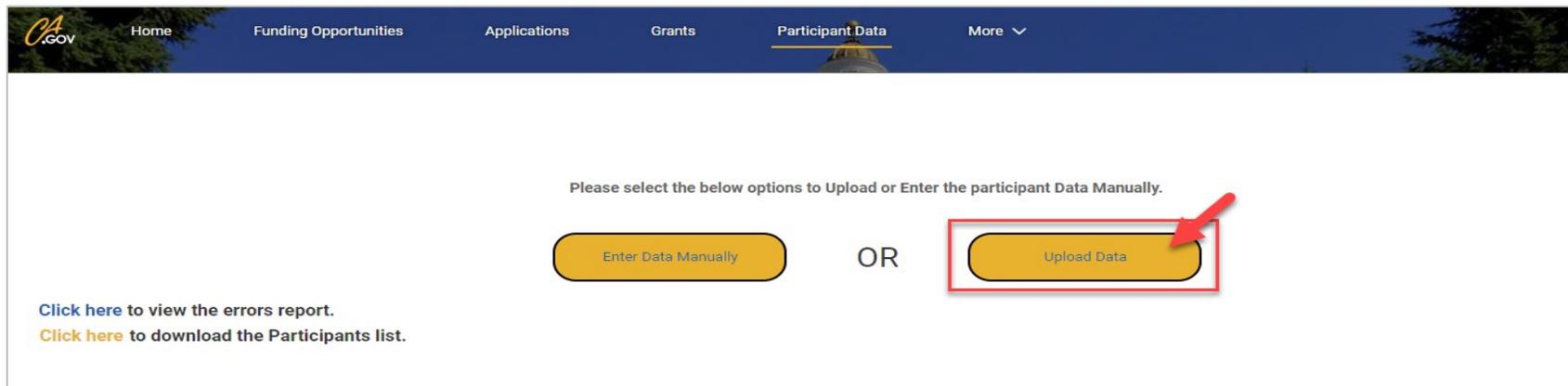
1. Select the **Participant Data** tab at the top of the Cal-E-Grants landing page.



2. Locate the **Enter Data Manually** and **Upload Data** buttons at the top of the page.



3. Select the **Upload Data** button.



4. View the **Upload Data** popup that appears.

Applications Grants Participant Data More

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 (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Supportive Services	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Training Services	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Credentials	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>

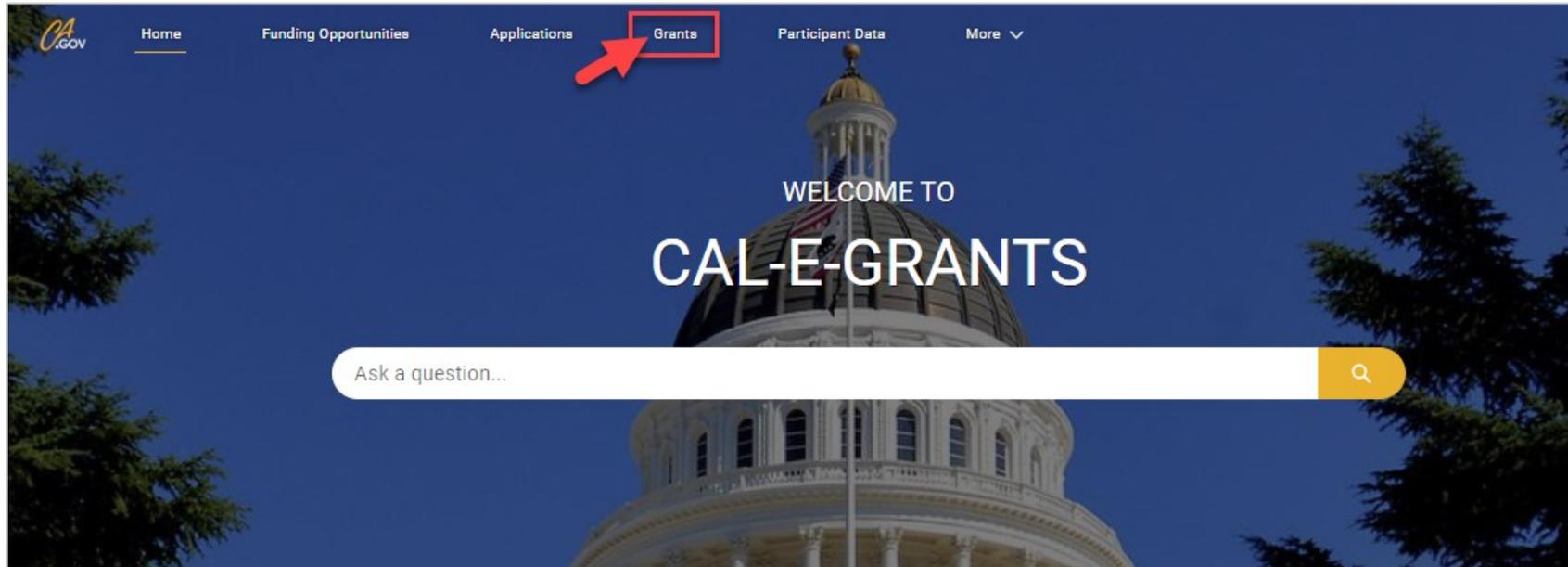
\* Please select a Grant

Search Grant...

Cancel

## Access via Grants Tab

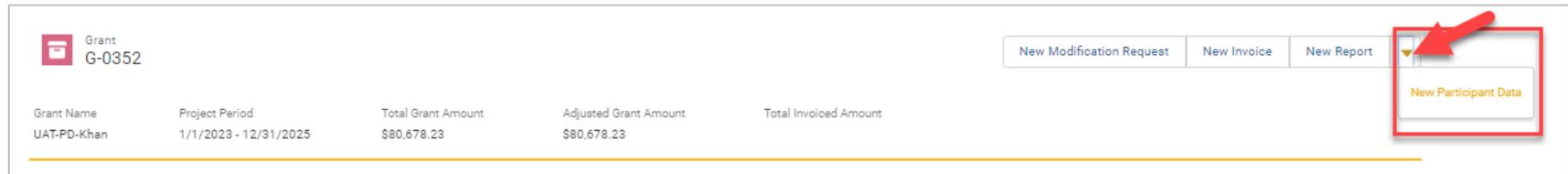
1. Select the **Grants** tab at the top of the landing page.



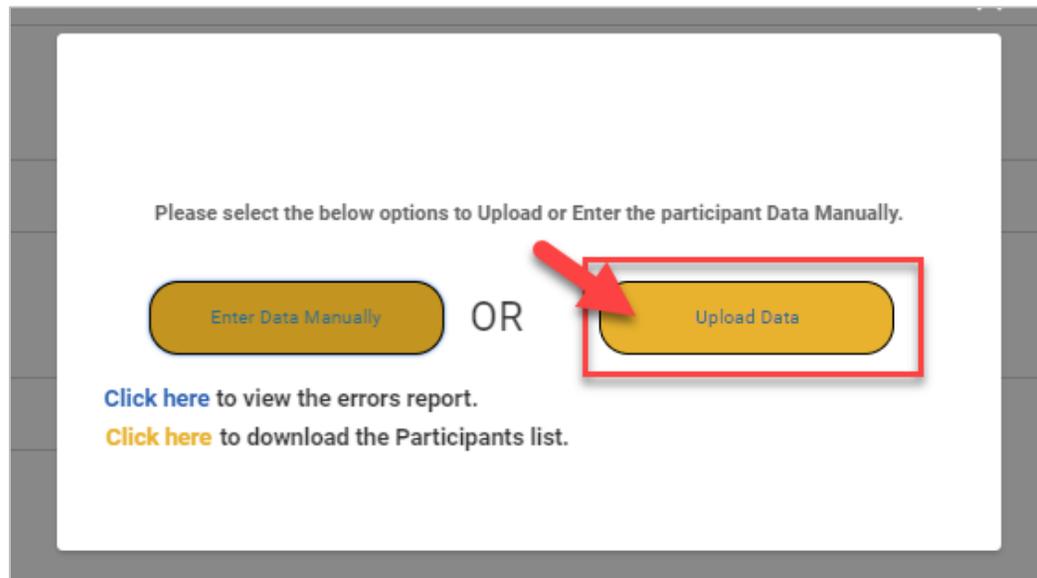
2. Select the **Grant ID** link.

Grant ID ↑	Grant Number	Funding Opportunity	Application	Total Grant A...	Status	Record Type	Created Date
1 <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 upper right-hand side of the Grant page, select the drop-down arrow and then select **New Participant Data**.



4. Select **Upload Data** from the popup that appears.



5. View the **Upload Data** popup that appears.

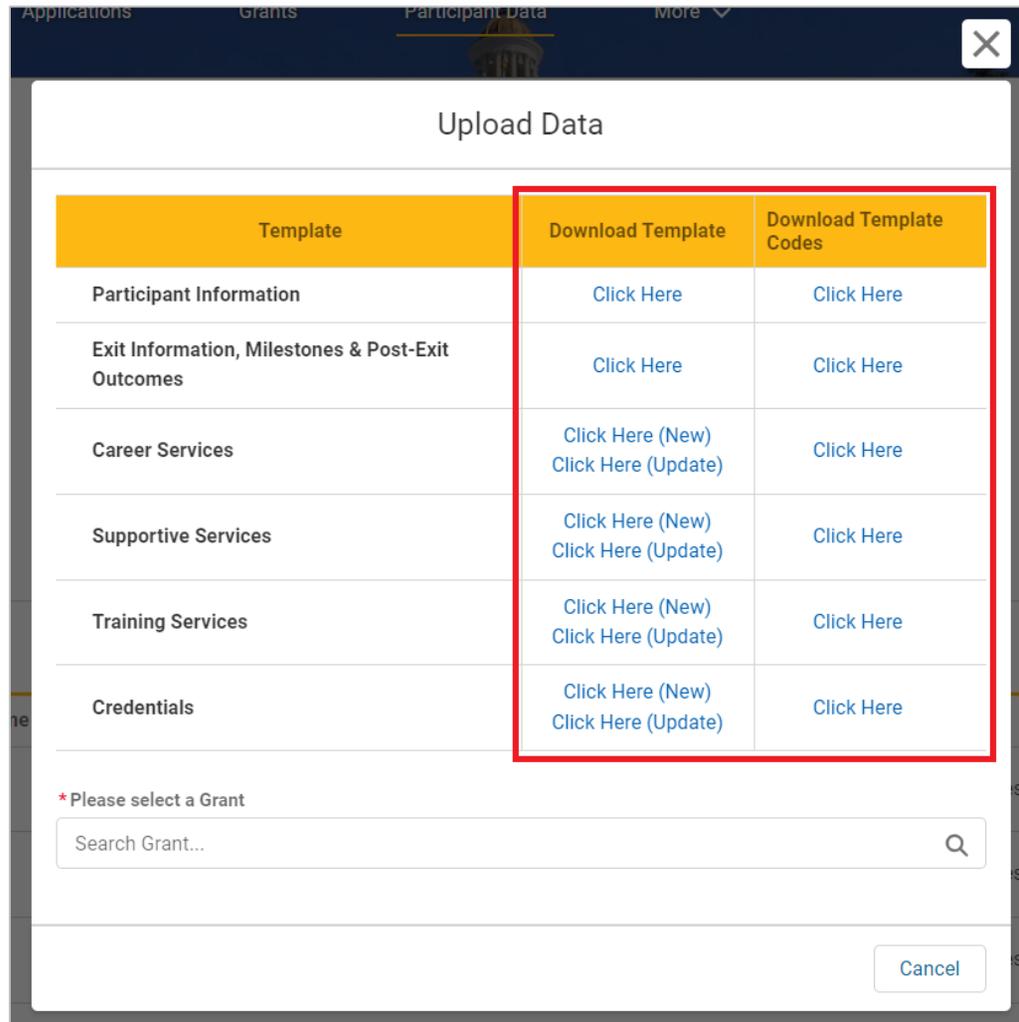
Template	Download Template	Download Template Codes
Participant Information	<a href="#">Click Here</a>	<a href="#">Click Here</a>
Exit Information, Milestones & Post-Exit Outcomes	<a href="#">Click Here</a>	<a href="#">Click Here</a>
Career Services	<a href="#">Click Here (New)</a> <a href="#">Click Here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

\*Please select a Grant

## UPLOAD PARTICIPANT DATA

1. Download all necessary templates and template codes from the **Upload Data** popup.

**Note:** If adding new services, use the **New** instead of the **Update** template.



The screenshot shows a web application interface with a dark blue header containing navigation tabs: 'Applications', 'Grants', 'Participant Data', and 'More'. A white 'Upload Data' popup window is open, featuring a table with three columns: 'Template', 'Download Template', and 'Download Template Codes'. The table lists six template categories, each with corresponding download links. A red rectangular box highlights the 'Download Template' and 'Download Template Codes' columns. Below the table is a search bar with the placeholder text 'Search Grant...' and a magnifying glass icon. A 'Cancel' button is located at the bottom right of the popup.

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 (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Supportive Services	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Training Services	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Credentials	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>

\*Please select a Grant

- Input all data beginning in **Row 2**.

**Note:** 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											

- Complete and save template(s) as a **.csv file**.

**Note:** Refer to specific **Template Codes** to the right of the **Download Template** column in the Upload Data Popup for formatting rules, codes, and descriptions of each field. (Example below.)

	<i>Required Field</i>	<i>Optional Field</i>	<i>Required Field</i>	<i>Required Field</i>	<i>Conditionally Required*</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>Format</b>	SINGLE LINE TEXT	SINGLE LINE TEXT	SINGLE LINE TEXT	MM/DD/YYYY	NUMBER 123-45-6789
<b>Description</b>	<p>Enter the legal first Name of the Participant.</p> <p><i>No Special Characters Allowed. Only values allowed are Spaces, Commas, Periods, Hyphens or Apostrophes.</i></p>	<p>Enter the full middle Name of the Participant.</p> <p><i>No Special Characters Allowed. Only values allowed are Spaces, Commas, Periods, Hyphens or Apostrophes.</i></p>	<p>Enter the legal last Name of the Participant.</p> <p><i>No Special Characters Allowed. Only values allowed are Spaces, Commas, Periods, Hyphens or Apostrophes.</i></p>	<p>Enter the Month, day, &amp; year of the Participant's date of birth.</p> <p>If missing, manually enter 1/1/1900. If only age is known, enter January 1st of the estimated year of birth.</p>	<p>If Participant has an SS Number, then the Social Security Number is required.</p>

<i>Required Field</i>	
<b>Transgender / Gender Nonconforming</b>	<b>Code</b>
Yes	Y
No	N
Participant did not self-identify	P
NA	NA
<b>Description</b>	Whether or not the participant identifies as transgender. Select Participant did not self-identify if the participant refused to self-identify. Select NA if data is unavailable for other reasons.

<i>Required Field</i>	
<b>Sexual Orientation</b>	<b>Code</b>
Heterosexual	1
Gay	2
Lesbian	3
Bisexual	4
Asexual	5
Queer	6
Other	7
Participant did not self-identify	8
NA	NA
<b>Description</b>	The Participant's Sexual Orientation. Select Participant did not self-identify if the participant refused to self-identify. Select NA if data is unavailable for other reasons.

4. To upload data for a specific Grant, scroll down to the bottom of the **Upload Data** window.
5. Select the Grant associated with the data upload and complete all required fields indicated by the red asterisk (\*). Then, drop in or select the file to be uploaded.

\* Please select a Grant

G-0342

1 - Select the Grant

\* Please select an option

Participant Information

Exit Information, Milestones & Post-Exit Outcomes

Career Services

Supportive Services

Training Services

Credentials

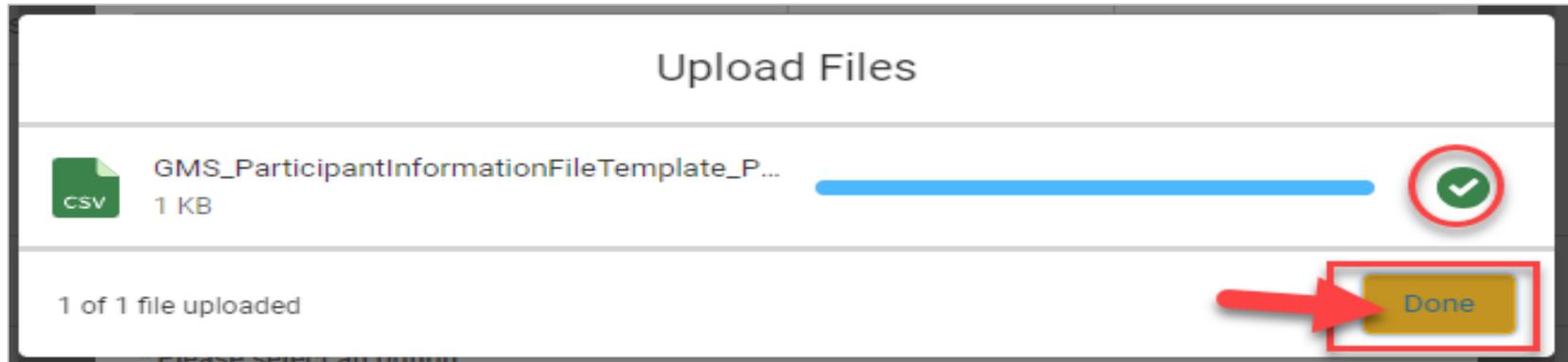
2 - Select which file you will be uploading

Upload Participant Information Data

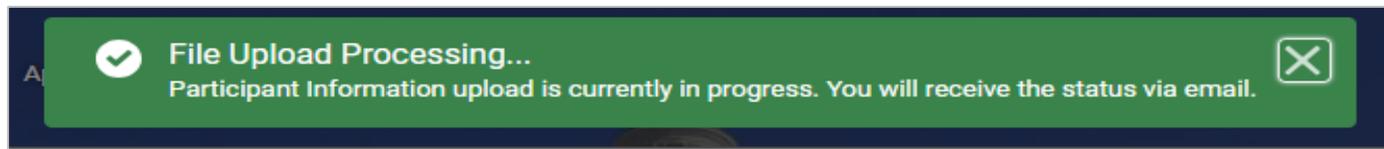
Upload Files Or drop files

3 - Upload the file

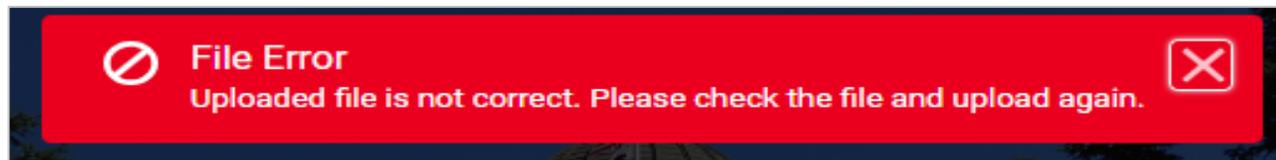
6. Select **Done** when the green check mark appears indicating the upload is complete.



7. A **File Upload Processing** message will appear at the top.



**Note:** If there is an error when uploading a file, a **File Error** message will appear. Please review the file for errors and upload again.



8. Check your email for the status of the upload, which will note the number of errors found.
9. Use link provided in the email to view the error report.

Upload completed on 2023-12-18 16:10:02.

Number of failed rows: 7

The Participant Information upload could not be fully saved due to field data upload errors. The Participant Information with valid entries has been saved.

Please see the report to review & fix any issues:

<https://caetp--staging.sandbox.my.site.com/calegrants/s/report/00OOC000000K4ep2AC/gms-upload-data-errors?queryScope=mru>

Please contact [researchunit@cwdb.ca.gov](mailto:researchunit@cwdb.ca.gov) for any questions or concerns regarding your error report.

10. Review report, which lists errors and corresponding row numbers.

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 Noncont</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 *Error Report* by selecting **Export** at the top right-hand corner of the page.

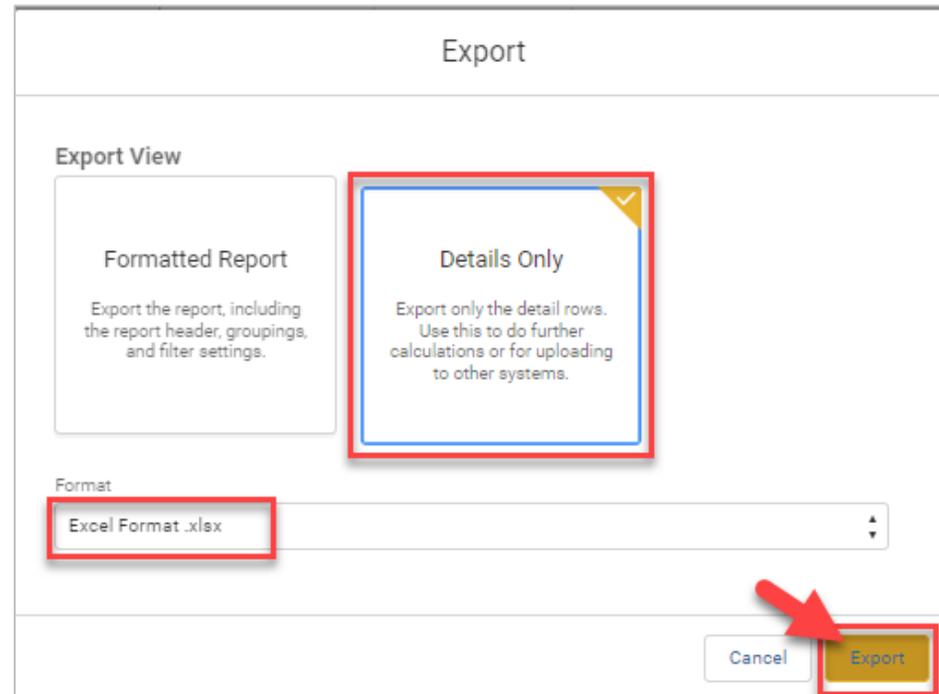
Report: Upload Data with Grant  
**GMS Upload Data Errors**

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

2. Select **Export View: Details Only** and the *Format* choice **Excel Format.xlsx** from the popup.
3. Then, select the **Export** button at the bottom right to complete the export.



4. Make all necessary corrections outlined in the error report. (See example below of multiple errors listed.)

Upload Data:	Upload Type	File Name	Upload Row N	Error Message
UD - 0017643	Participant Information	GGGMS_ParticipantInformationFileTemplate (1	2	• Unemployment Insurance (UI) Eligible option is not correct. Please check the Participant Information Codes template and corre
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 i
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-
UD - 0024655	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	2	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corre
UD - 0024656	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	3	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corre
UD - 0024659	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 i
UD - 0017645	Participant Information	GGGMS_ParticipantInformationFileTemplate (1	2	• Unemployment Insurance (UI) Eligible option is not correct. Please check the Participant Information Codes template and corre
UD - 0017646	Participant Information	GGGMS_ParticipantInformationFileTemplate (1	2	• Date Of Birth format is not correct. Format must be MM/DD/YYYY
UD - 0024657	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	4	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corre
UD - 0024658	Participant Information	GMS_ParticipantInformationFileTemplate_PK_	5	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corre

**Note:** Changes can be corrected in the original spreadsheet and reuploaded.

## VIEWING THE PARTICIPANT DATA DETAIL PAGE

The **Participant Data** table has a search bar located at the top right-hand corner. This can be used to locate previously entered participant data.

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

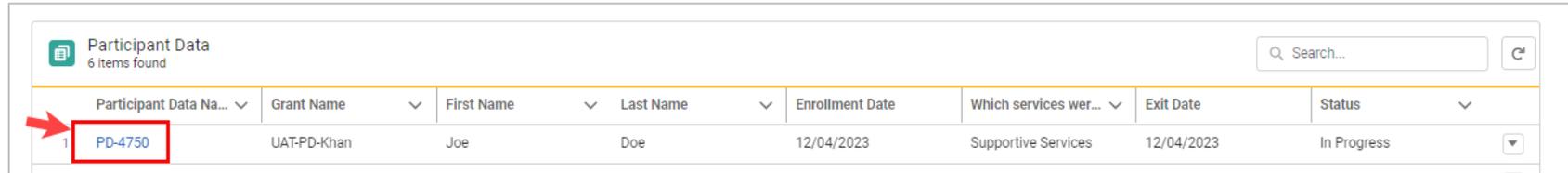
Enter Data Manually
OR
Upload Data

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

**Participant Data**  
0 items found

Participant Data Name	Grant Name	First Name	Last Name	Enrollment Date	Which services were pr...	Exit Date

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

2. In the **Participant Data** entry, locate the **Participant ID** at the top. The Participant ID is required to upload data on each subsequent template.



**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 below:

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

The Participant ID can also be downloaded in a **Participants List** on the **Participant Data** landing page.

**Note:** Participant IDs are needed to upload data in all subsequent templates.



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.

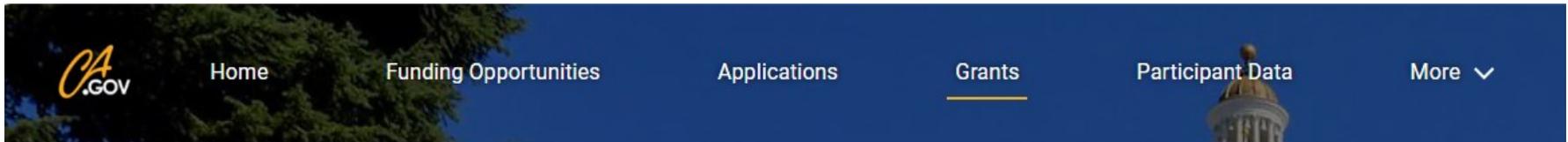
[Click here](#) to download the Participants list.

3. Repeat these steps to upload data on additional tabs (services, exit information, etc.) as needed.

## BULK UPDATING SERVICES

### Access via Grants Tab (Recommended)

Statuses of services can be updated in bulk by accessing the appropriate reports under the **Grants** tab in Cal-E-Grants.



1. 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

2. Select the **Reports** tab to locate the prefilled Service data templates. Select correct service type to automatically download the report.

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

General Reports

[Upload Data Errors](#)

[Participant Data and Services](#)

Existing Services Downloads (For Updating Services)  
Only for Participant Data in 'In Progress' Status

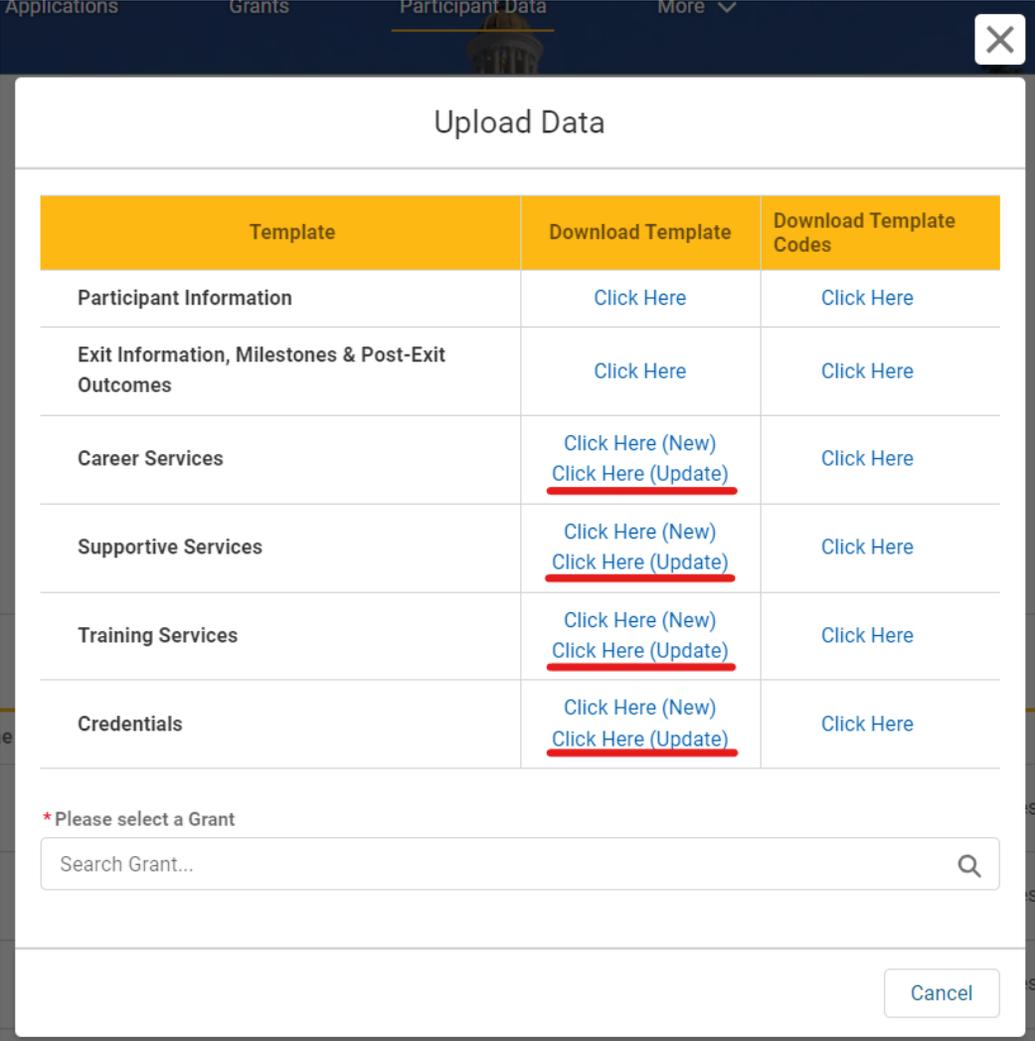
- [Career Services](#)
- [Supportive Services](#)
- [Training Services](#)
- [Credentials](#)

3. Update the **Service Status** and **Completion/Withdrawal Date** directly in the prefilled template before re-uploading to Cal-E-Grants, following the steps outlined above.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Training Service ID	Participant	Training Pr	Training Cc	Training Start	Training Ty	Occupatio	Occupatio	Training Course Status	Training Completion / Withdraw Date	Reason for Withdrawing from Training			
2	PD24990TS4243	testparticij	ABC Traine	OSHA Trai	10/1/2024	3	OSHA		C	12/18/2024				
3														
4														

### Access via the Participant Data Tab

If preferred, service data can be updated by entering new information into a blank template. A blank **Update Template** can be downloaded on the **Participant Data** Tab when **Upload Data** is selected.



The screenshot shows a modal window titled "Upload Data" with a dark blue header containing navigation tabs: "Applications", "Grants", "Participant Data" (which is active), and "More". A close button (X) is in the top right corner. The main content is a table with three columns: "Template", "Download Template", and "Download Template Codes". The table lists six categories: "Participant Information", "Exit Information, Milestones & Post-Exit Outcomes", "Career Services", "Supportive Services", "Training Services", and "Credentials". For "Career Services", "Supportive Services", and "Training Services", the "Download Template" column contains two links: "Click Here (New)" and "Click Here (Update)", with the latter underlined in red. The "Download Template Codes" column contains a "Click Here" link for each row. Below the table is a search field with the placeholder text "Search Grant..." and a magnifying glass icon, preceded by the text "\*Please select a Grant". A "Cancel" button is located at the bottom right of the modal.

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 (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Supportive Services	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Training Services	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>
Credentials	<a href="#">Click Here (New)</a> <a href="#">Click Here (Update)</a>	<a href="#">Click Here</a>

\*Please select a Grant

The blank **Update Template** allows services to be entered as they are completed. Service IDs can be copied and pasted from the prefilled templates or entered manually. Once all fields have been completed, the template can be uploaded to the system. To avoid errors, details will need to match what has already been added to the system.

	A	B	C	D	E	F	G	
1	Training Service ID	Participant ID	Training Provider Name	Training Course Name	Training Start Date	Training Type	Occupation of Training (Description)	Occ
2								
3								
4								
5								
6								
7								
8								

**Note:** The naming convention will follow the format below:

Participant Data Name + System Generated Service Name – i.e., PD-24990 + TS-4243 = PD24990TS4243

The **System Generated Service Name** will need to be retrieved from a participant’s entry, under the appropriate service tab.

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 border and a red arrow points to it. At the bottom right, there are three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'.

Once on the appropriate Service tab, the System Generated Service Names are located in the *Name* column.

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

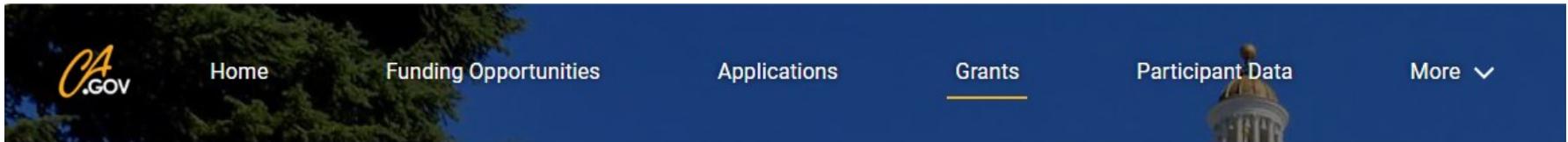
O\*Net Code Lookup Tool [Here](#)

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)

## FINAL SUBMISSION

### Access via Grants Tab (Recommended)

After participants exit 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.



1. Select the appropriate **Grant ID**.

Grants  
All ▾ 

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	<b>G-0450</b>		AB 628 Breaking Barriers to Employment Initiative 2.0	PD UAT Susie Test 1	\$100.00

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

✓
Active
Closed

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

Participant Data  
4 items found

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

3. Once the Bulk Submit button is selected, a popup window will appear listing participants eligible to be submitted. Select check boxes for participants being closed out, 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...	Refresh	Bulk Submit
Participant D...	Grant Name	First Name	Last Name	Enrollment Date	Which servic...	Exit Date	Status	Created By	LastModified...				
1 <a href="#">PD-25179</a>	PD UAT Susie Test 1	Bernie	Test	11/04/2024	Supportive Services		In Progress	CWDB	Susie Gates	▼			
2 <a href="#">PD-24990</a>	PD UAT Susie Test 1	Test	Participant	12/04/2024	Supportive Services; Training Services	12/18/2024	Submitted	CWDB	Susie Gates	▼			
3 <a href="#">PD-24963</a>	PD UAT Susie Test 1	Jane	Test	11/04/2024	Career Services	12/04/2024	Submitted	CWDB	Susie Gates	▼			
4 <a href="#">PD-24964</a>	PD UAT Susie Test 1	Joe	Test	11/04/2024	Career Services		In Progress	CWDB	Susie Gates	▼			

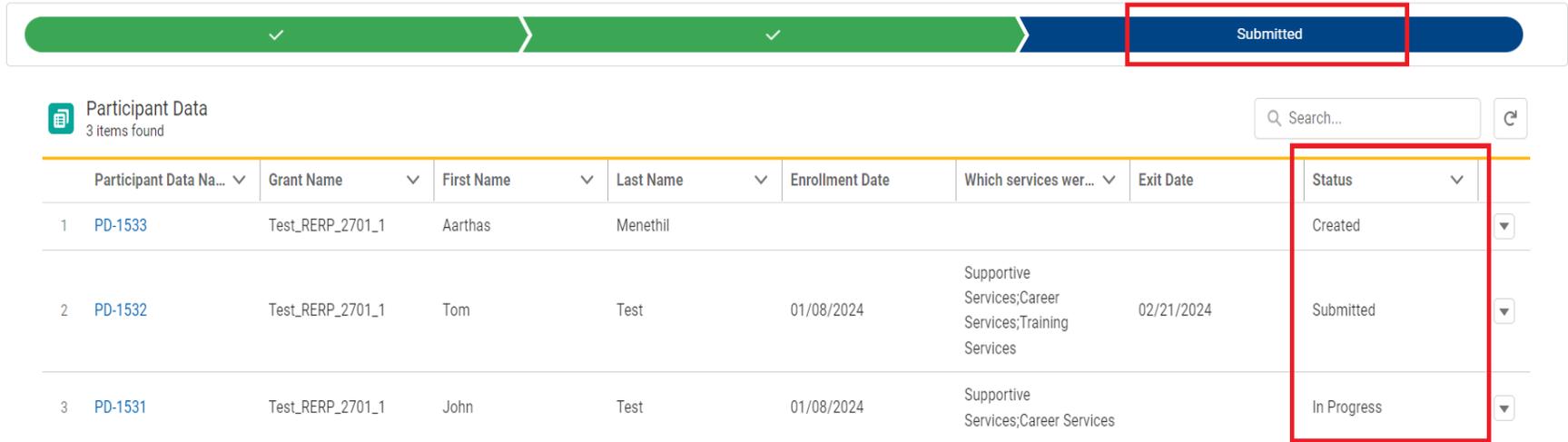
## Access via the Participant Data Detail Page

When a grantee is 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.

The image shows two screenshots of the 'Participant Data Detail Page' interface. The top screenshot, labeled '1', shows the 'Top of Details tab'. It features a progress bar with three segments: 'Completed' (green), 'In Progress' (dark blue), and 'Submitted' (light grey). Below the progress bar is a navigation menu with tabs: 'Details' (highlighted in orange), 'Supportive Services', 'Career Services', 'Training Services', and 'Credentials'. At the bottom right of this section are three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'. A red arrow points to the 'Final Submission' button, which is enclosed in a red rectangular box. The bottom screenshot, labeled '2', shows the 'Bottom of Details tab'. It 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.' Below this message are the same three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'. A red arrow points to the 'Final Submission' button, which is also enclosed in a red rectangular box.

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

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*.



The image shows a progress ribbon at the top with three segments: two green segments with checkmarks and one blue segment labeled 'Submitted' which is highlighted with a red box. Below the ribbon is a 'Participant Data' section with a search bar and a table of 3 items. The table has columns for Participant Data Na..., Grant Name, First Name, Last Name, Enrollment Date, Which services wer..., Exit Date, and Status. The Status column is highlighted with a red box and shows 'Created', 'Submitted', and 'In Progress' for the three rows.

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

**Note:** 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.

## SUMMARY OF STEPS

### Life Cycle of a Participant in Cal-E-Grants

1. Upload (or manually enter) 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.