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

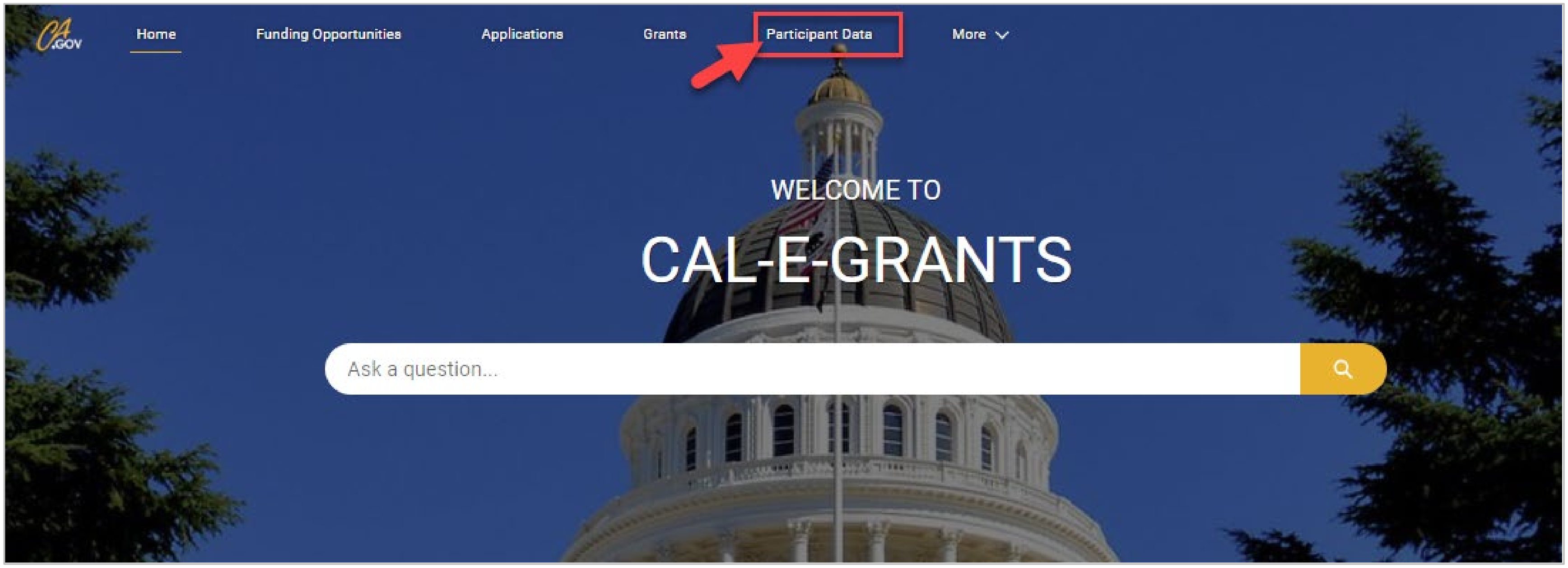
Contents

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

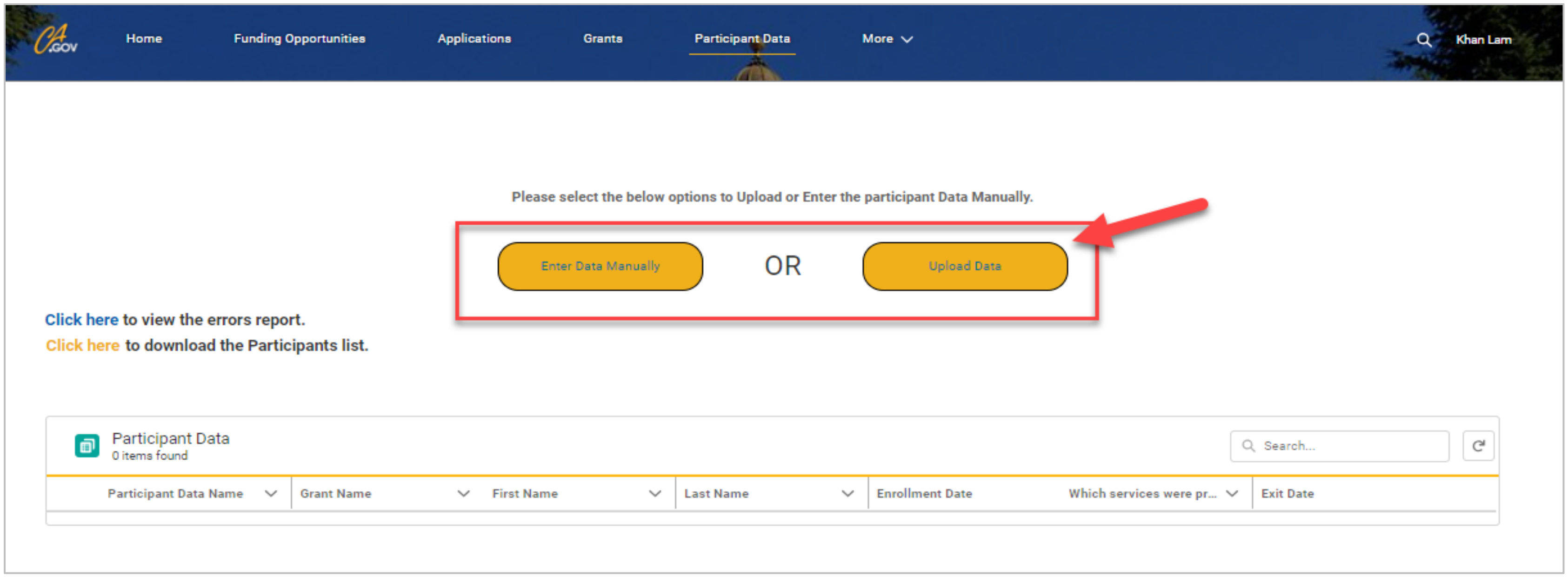
ACCESSING PARTICIPANT DATA: UPLOAD PROCESS

Access via the Participant Data Tab

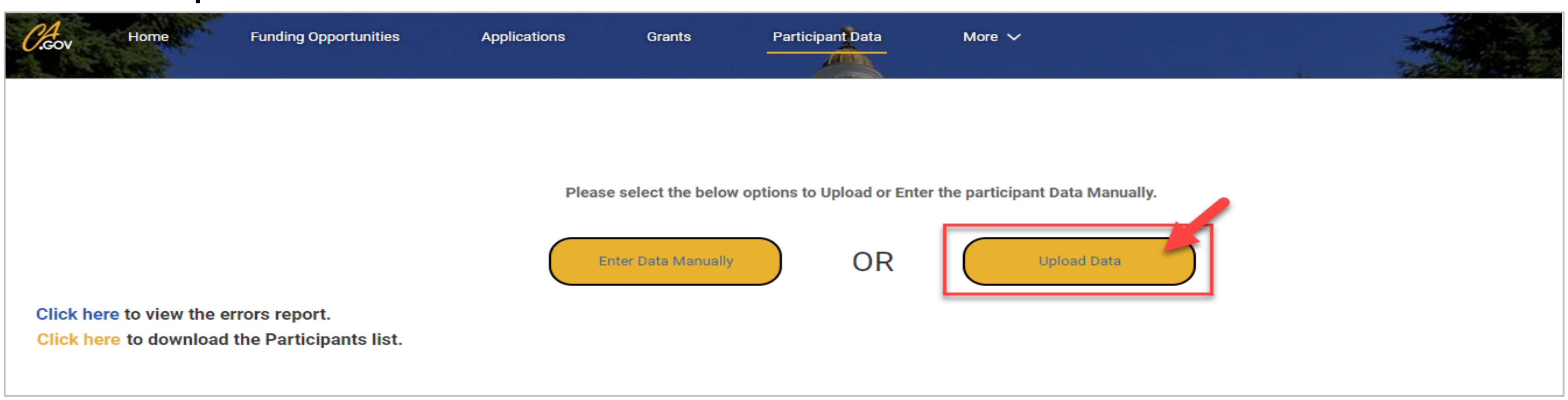
1. Select the **Participant Data** tab at the top of the Cal-E-Grants landing page.



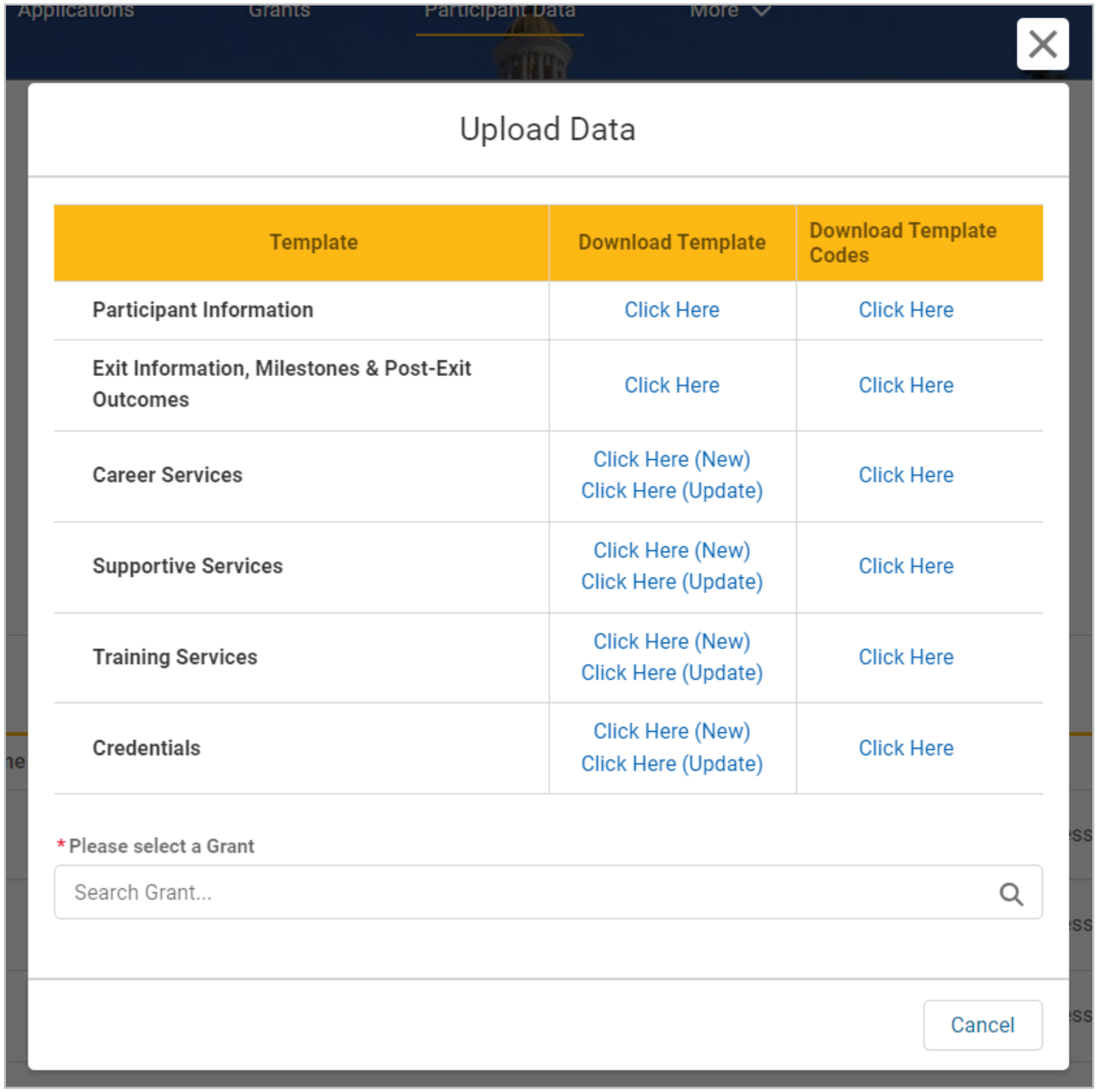
2. Locate the **Enter Data Manually** and **Upload Data** buttons at the top of the page.



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

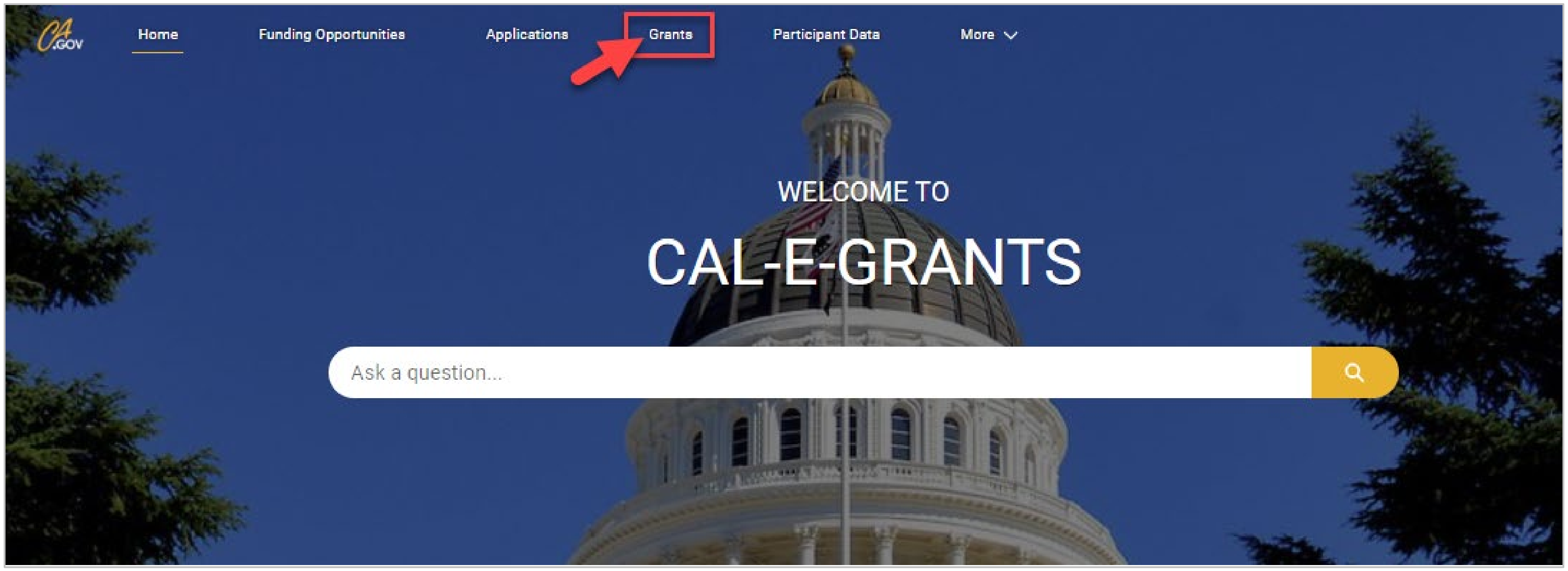


4. View the **Upload Data** popup that appears.

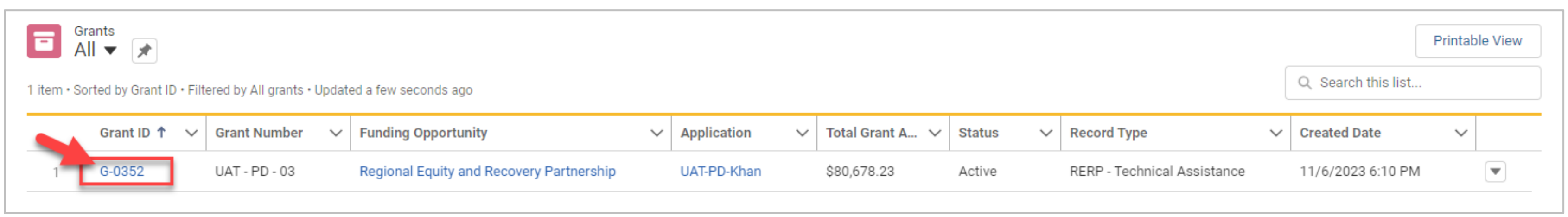

Applications
Grants
Participant Data
More
Upload Data
Template
Download Template
Download Template Codes
Participant Information
Click Here
Click Here
Exit Information, Milestones & Post-Exit Outcomes
Click Here
Click Here
Career Services
Click Here (New)
Click Here (Update)
Click Here
Supportive Services
Click Here (New)
Click Here (Update)
Click Here
Training Services
Click Here (New)
Click Here (Update)
Click Here
Credentials
Click Here (New)
Click Here (Update)
Click Here
*Please select a Grant
Search Grant...
Cancel

Access via Grants Tab

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

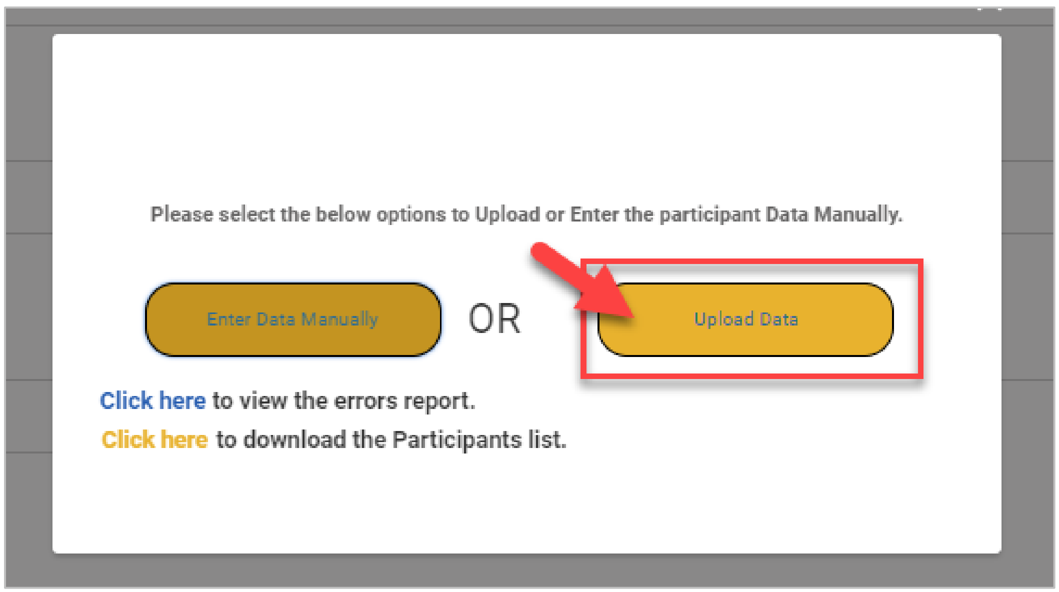


2. Select the **Grant ID** link**.**

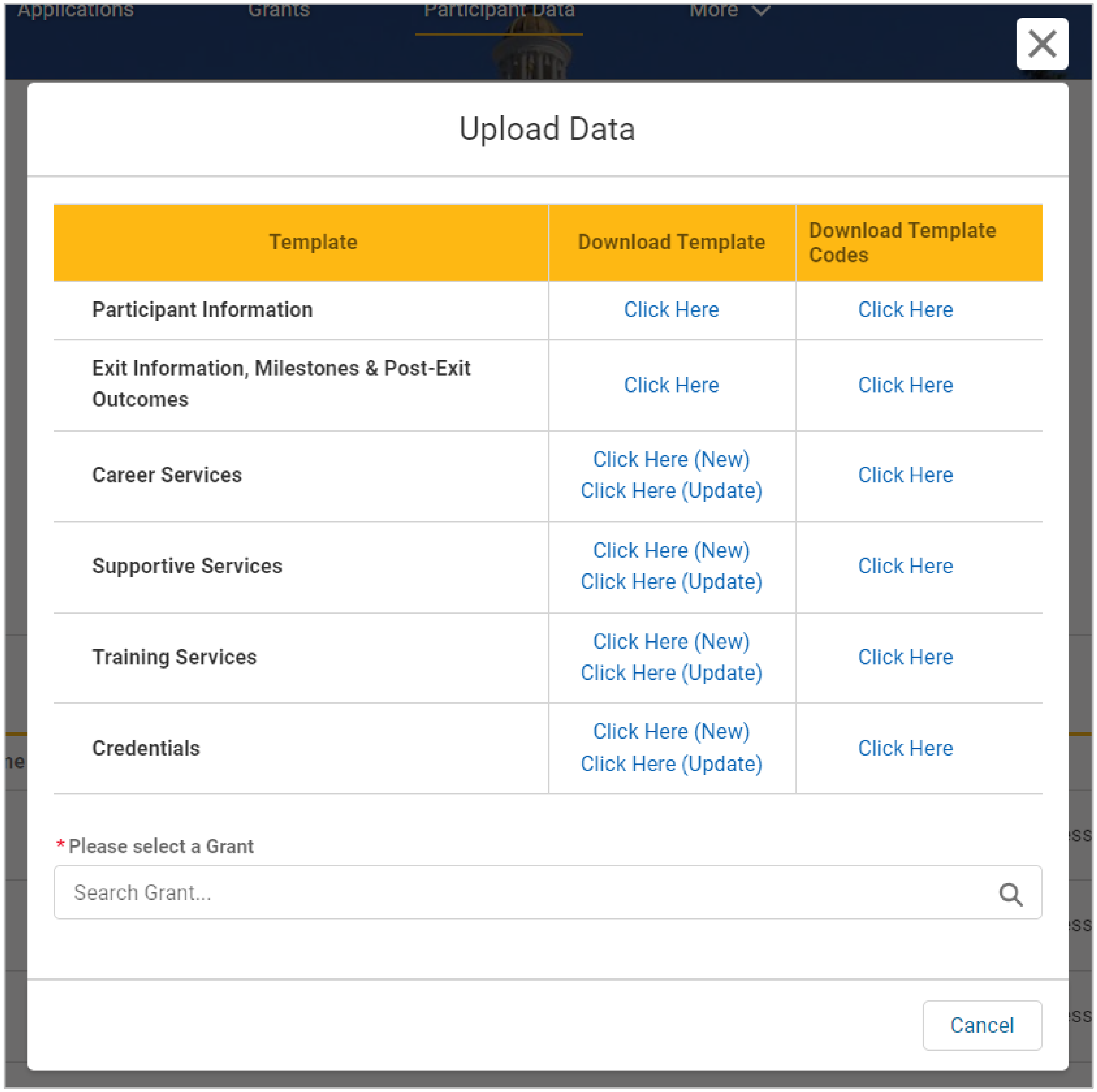


3. On the upper right-hand side of the Grant page, select the drop-down arrow and then select **New Participant Data**.

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



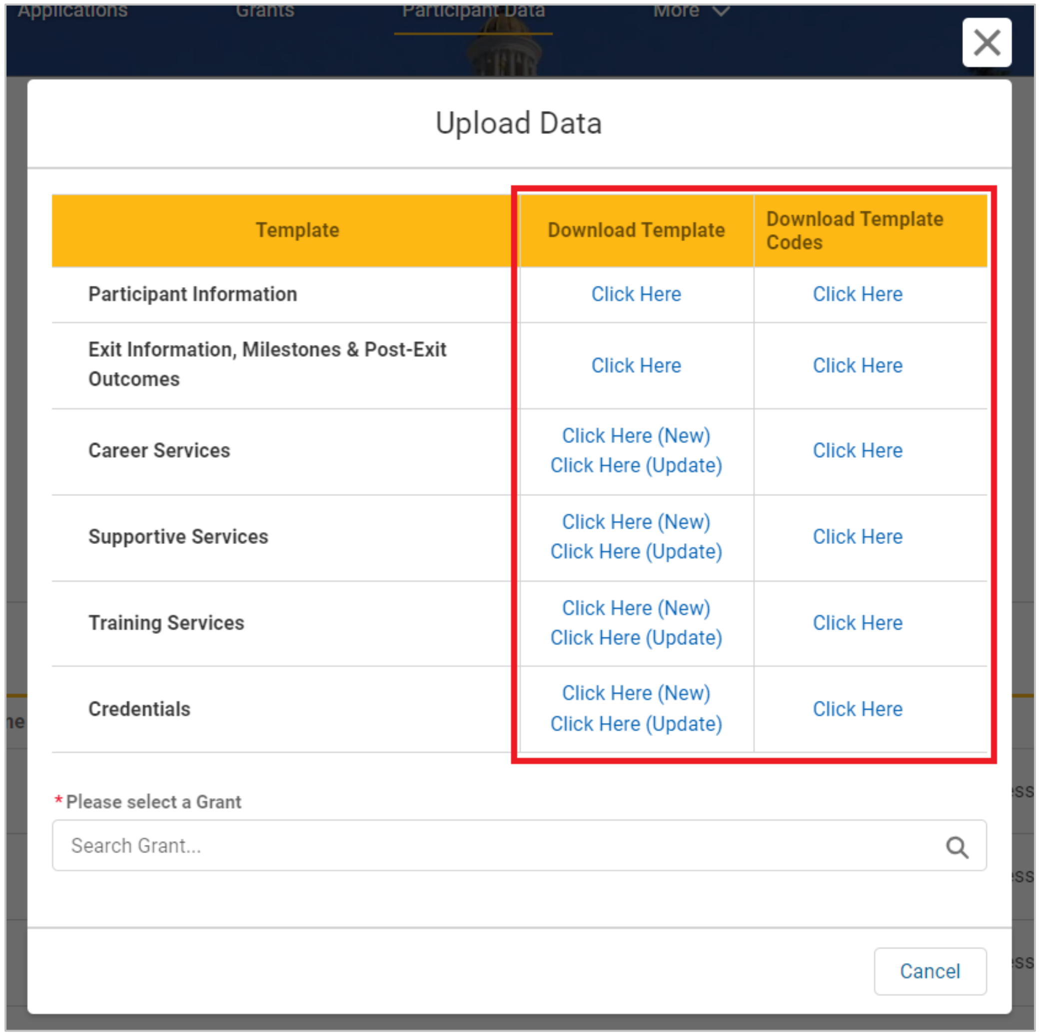
5. View the **Upload Data** popup that appears.



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.*



2. 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											

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.* *(See pages 11, 12 for examples)*

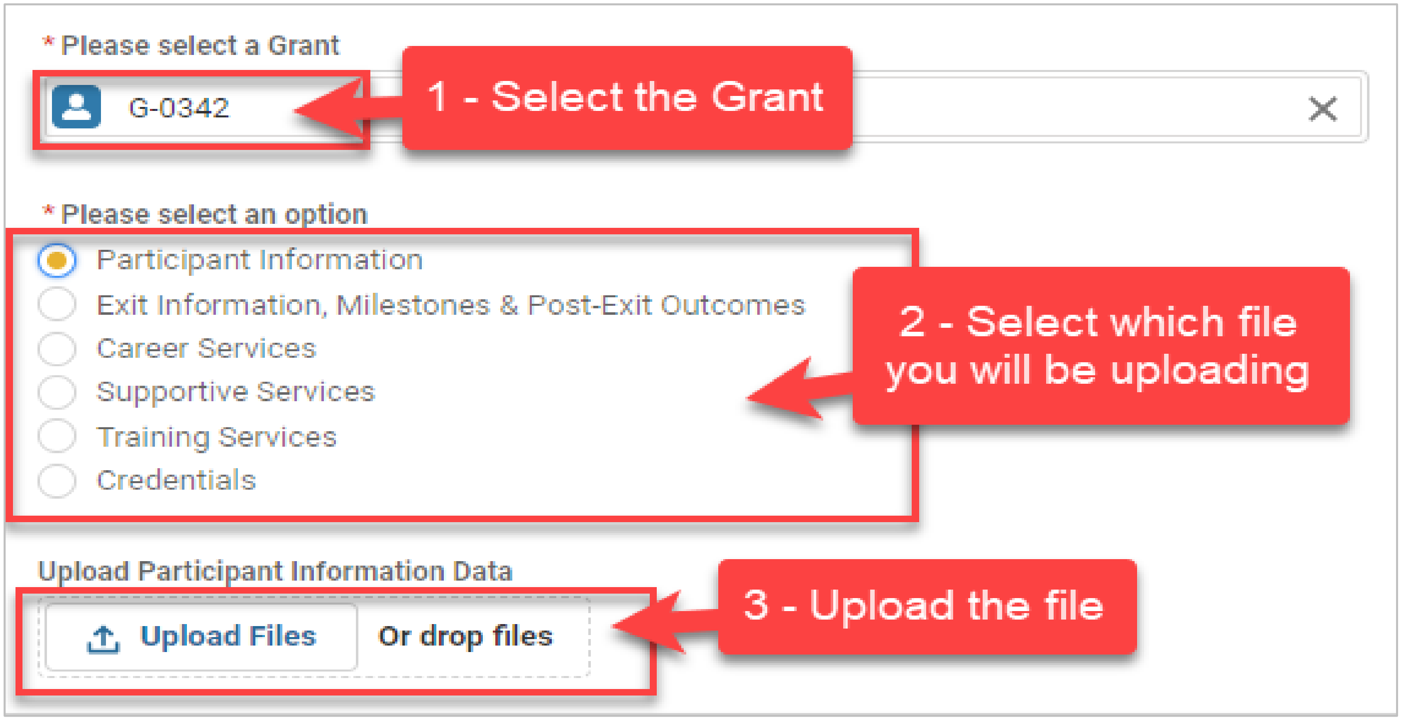
	Required Field	*Optional Field*	*Required Field*	*Required Field*	*Conditionally Required**
Field	**First Name**	**Middle Name**	**Last Name**	**Date of Birth**	**Social Security Number**
Format	SINGLE LINE TEXT	SINGLE LINE TEXT	SINGLE LINE TEXT	MM/DD/YYYY	NUMBER 123-45-6789
Description	Enter the legal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

Required Field	
Transgender / Gender Nonconforming	**Code**
Yes	Y
No	N
Participant did not self-identify	P
NA	NA
Description	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.

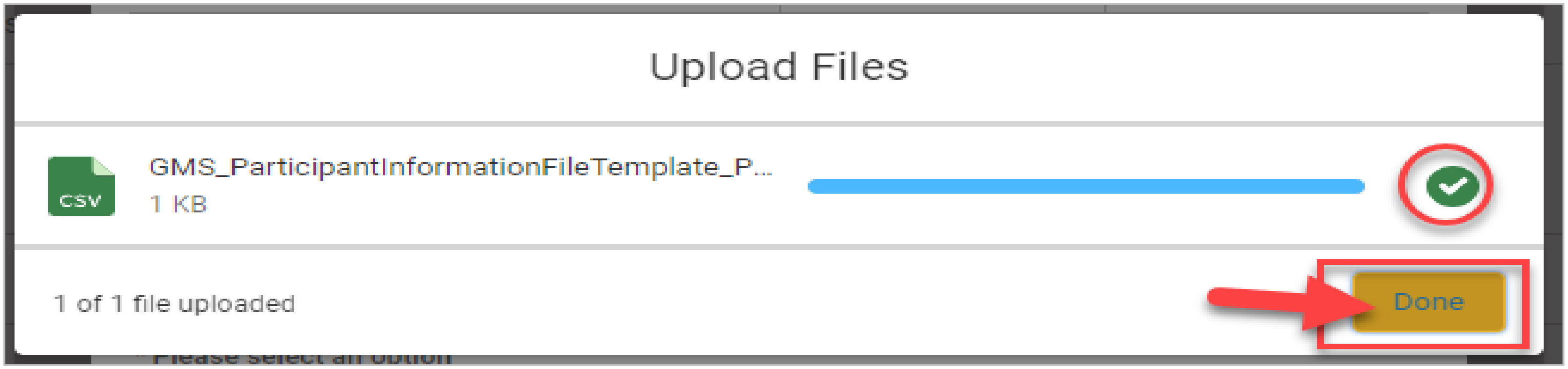
Required Field	
Sexual Orientation	**Code**
Heterosexual	1
Gay	2
Lesbian	3
Bisexual	4
Asexual	5
Queer	6
Other	7
Participant did not self-identify	8
NA	NA
Description	The Participant's Sexual Orientation. Select Participant did not self-identify if the participant refused to self-identify. Select NA if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

4. To upload data for a specific Grant, scroll down to the bottom of the **Upload Data** window.

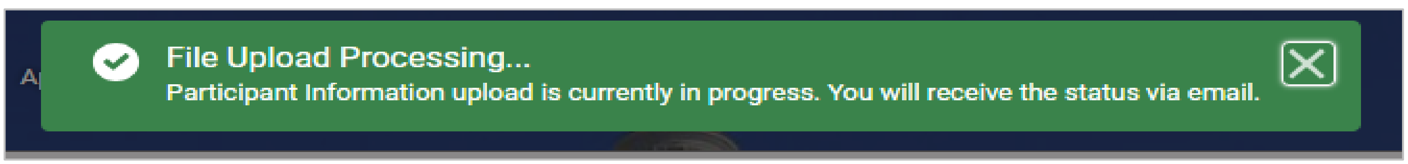
5. Select the Grant associated with the data upload and complete all required fields indicated by the red asterisk (*). Then, drop in or select the file to be uploaded.



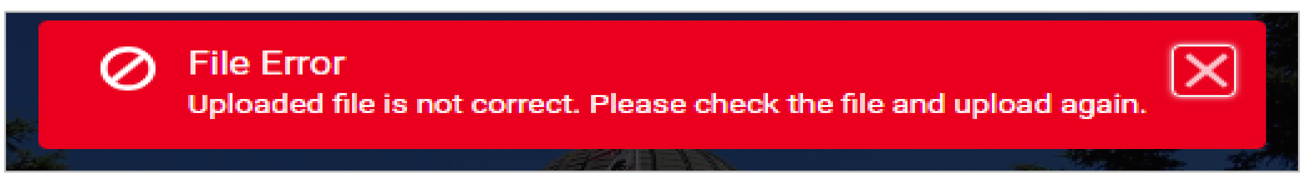
6. Select **Done** when the green check mark appears indicating the upload is complete.



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

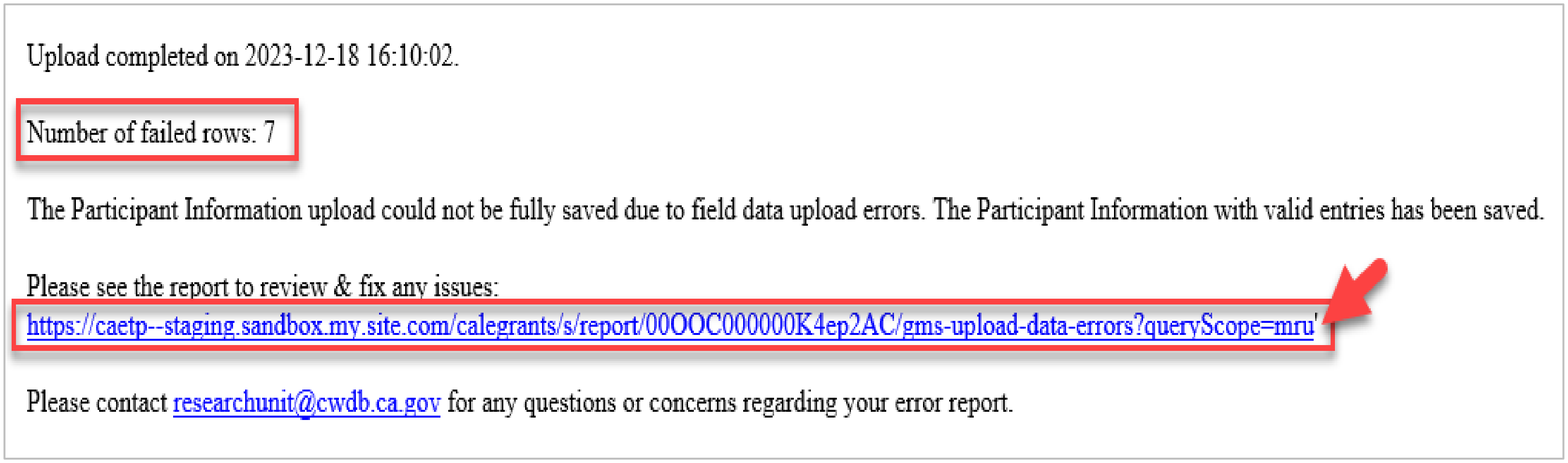


Note: *If there is an error when uploading a file, a **File Error** message will appear. Please review the file for errors and upload again.*



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.

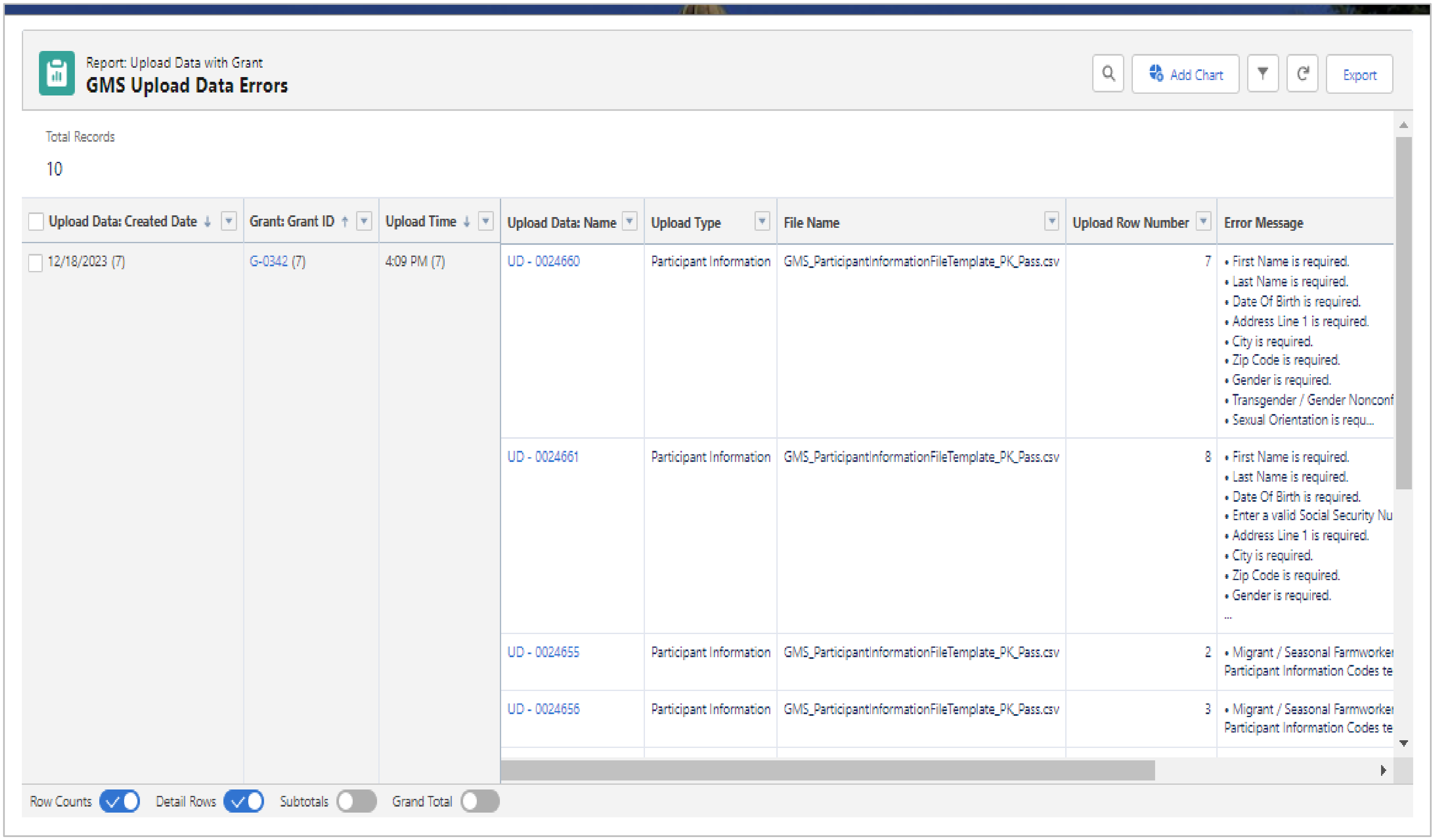
Number of failed rows: 7

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 for any questions or concerns regarding your error report.

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



Report: Upload Data with Grant

GMS Upload Data Errors

Search | Add Chart | Filter | Refresh | Export

Total Records

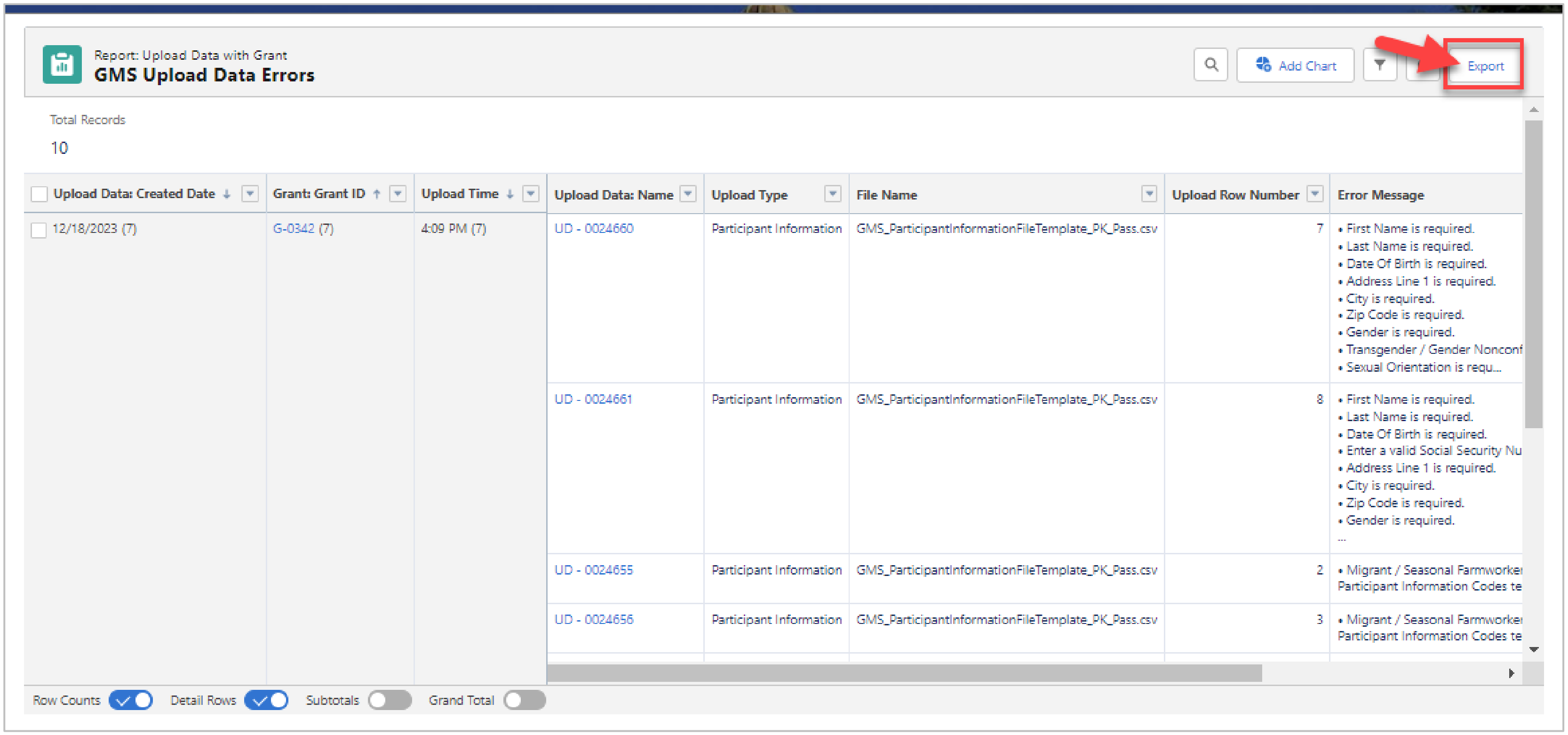
10

Upload Data: Created Date	Grant: Grant ID	Upload Time	Upload Data: Name	Upload Type	File Name	Upload Row Number	Error Message
12/18/2023 (7)	G-0342 (7)	4:09 PM (7)	UD - 0024660	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	7	• First Name is required. • Last Name is required. • Date Of Birth is required. • Address Line 1 is required. • City is required. • Zip Code is required. • Gender is required. • Transgender / Gender Nonconf • Sexual Orientation is requ...
			UD - 0024661	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	8	• First Name is required. • Last Name is required. • Date Of Birth is required. • Enter a valid Social Security Nu • Address Line 1 is required. • City is required. • Zip Code is required. • Gender is required. ...
			UD - 0024655	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	2	• Migrant / Seasonal Farmworke Participant Information Codes te
			UD - 0024656	Participant Information	GMS_ParticipantInformationFileTemplate_PK_Pass.csv	3	• Migrant / Seasonal Farmworke Participant Information Codes te

Row Counts | Detail Rows | Subtotals | Grand Total

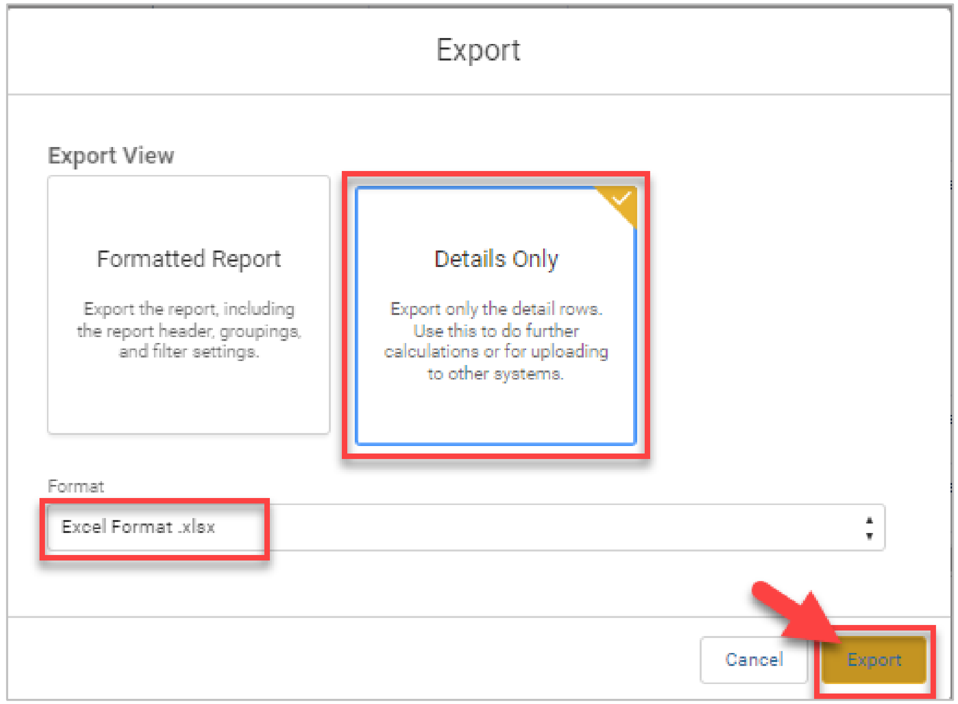
EXPORT ERROR REPORT

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



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.



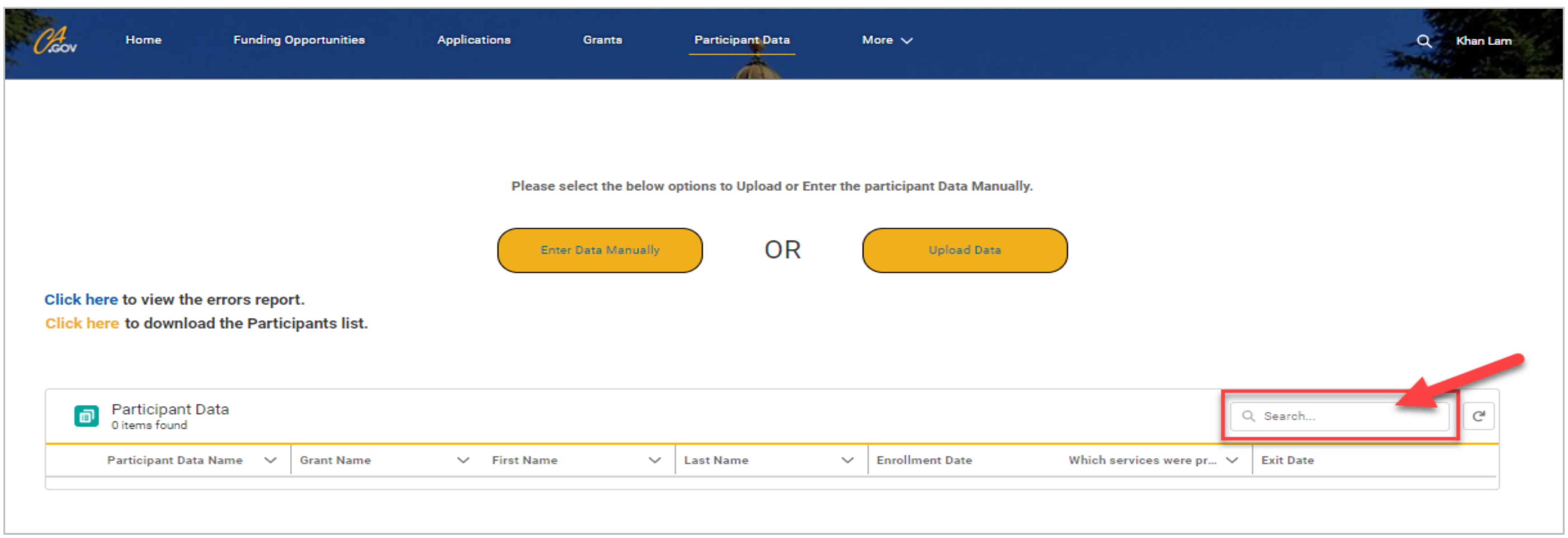
4. Make all necessary corrections outlined in the error report. (See example of multiple errors listed on page 19.)

Upload Data:	Upload Type	File Name	Upload Row N	Error Message
UD - 0017643	Participant Informatior	GGGMS_ParticipantInformationFileTemplate (1	2	• Unemployment Insurance (UI) Eligible option is not correct. Please check the Participant Information Codes template and corre
UD - 0024660	Participant Informatior	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 Informatior	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 Informatior	GMS_ParticipantInformationFileTemplate_PK_	2	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corr
UD - 0024656	Participant Informatior	GMS_ParticipantInformationFileTemplate_PK_	3	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corr
UD - 0024659	Participant Informatior	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 Informatior	GGGMS_ParticipantInformationFileTemplate (1	2	• Unemployment Insurance (UI) Eligible option is not correct. Please check the Participant Information Codes template and corre
UD - 0017646	Participant Informatior	GGGMS_ParticipantInformationFileTemplate (1	2	• Date Of Birth format is not correct. Format must be MM/DD/YYYY
UD - 0024657	Participant Informatior	GMS_ParticipantInformationFileTemplate_PK_	4	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corr
UD - 0024658	Participant Informatior	GMS_ParticipantInformationFileTemplate_PK_	5	• Migrant / Seasonal Farmworker Status option is not correct. Please check the Participant Information Codes template and corr

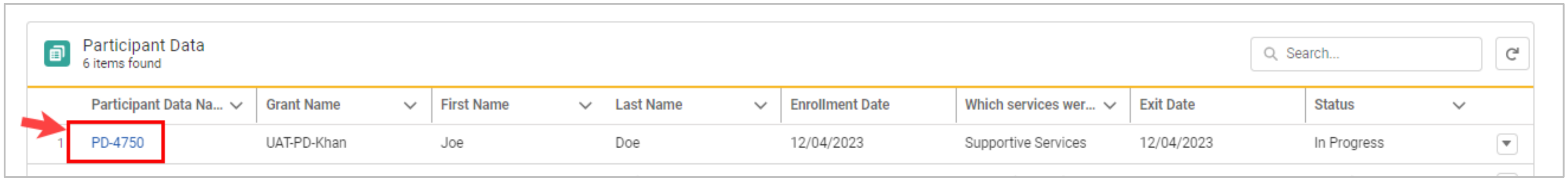
Note: *Changes can be corrected in the original spreadsheet and reuploaded.*

VIEWING THE PARTICIPANT DATA DETAIL PAGE

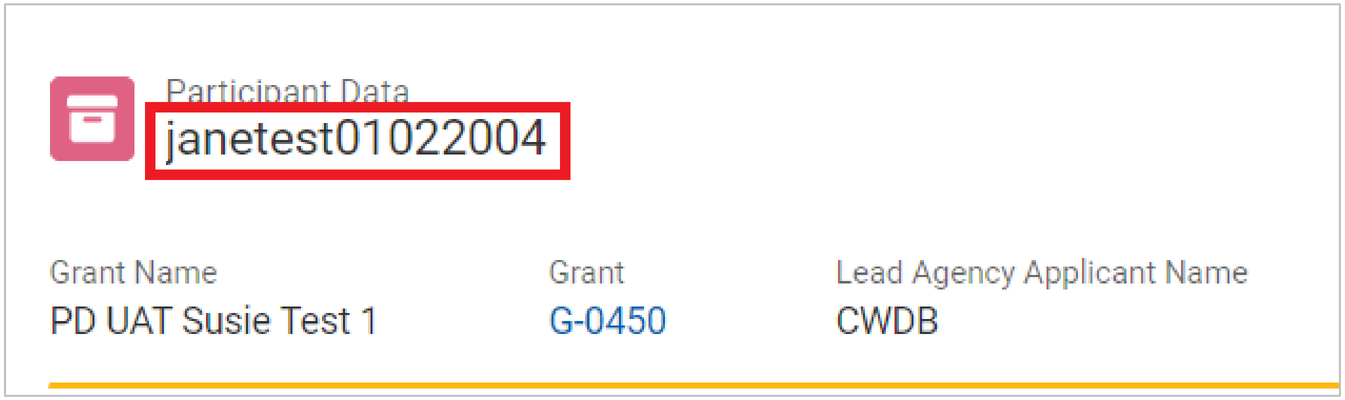
The **Participant Data** table has a search bar located at the top right-hand corner. This can be used to locate previously entered participant data.



1. Select the **Participant Data Name** to open the entry.

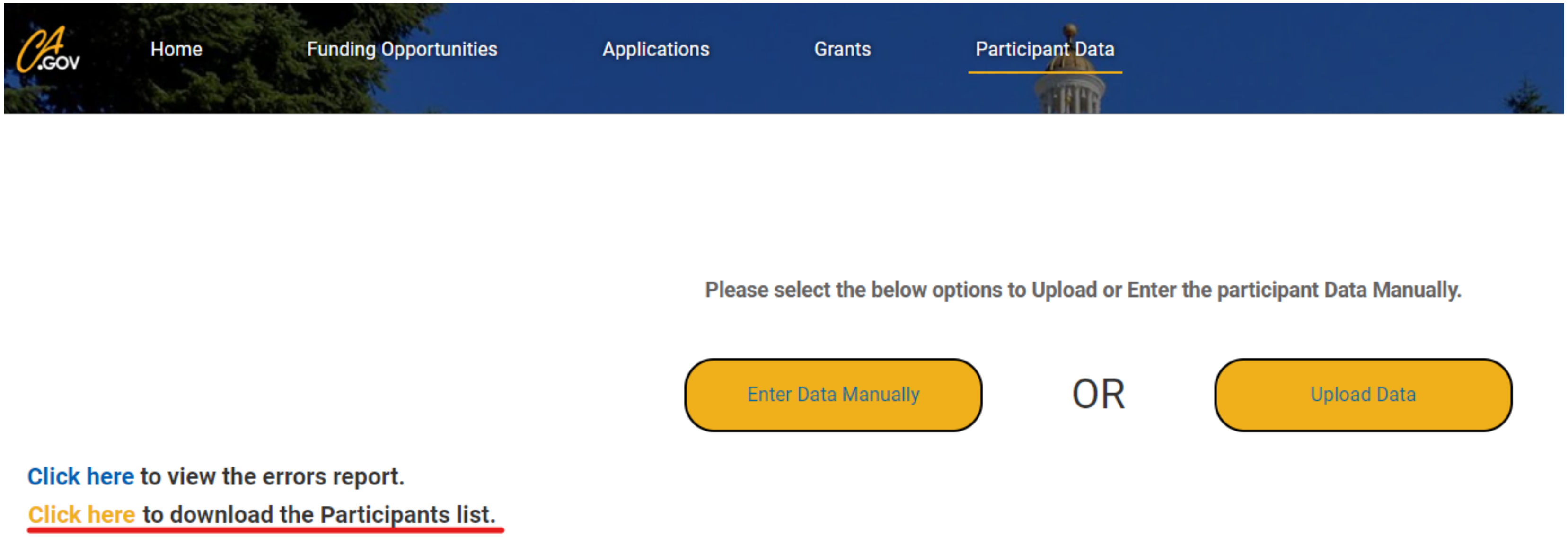


2. In the **Participant Data** entry, locate the **Participant ID** at the top. The Participant ID is required to upload data on each subsequent template.



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*.

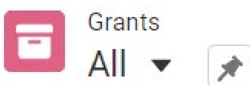


Repeat these steps to upload data on additional tabs (services, exit information, etc.) as needed.

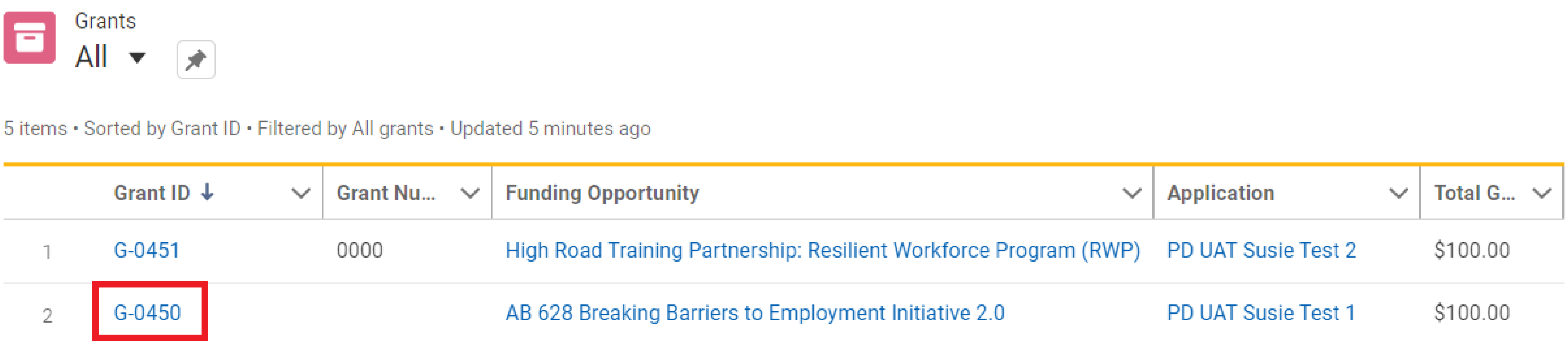
BULK UPDATING SERVICES

Access via Grants Tab (Recommended)

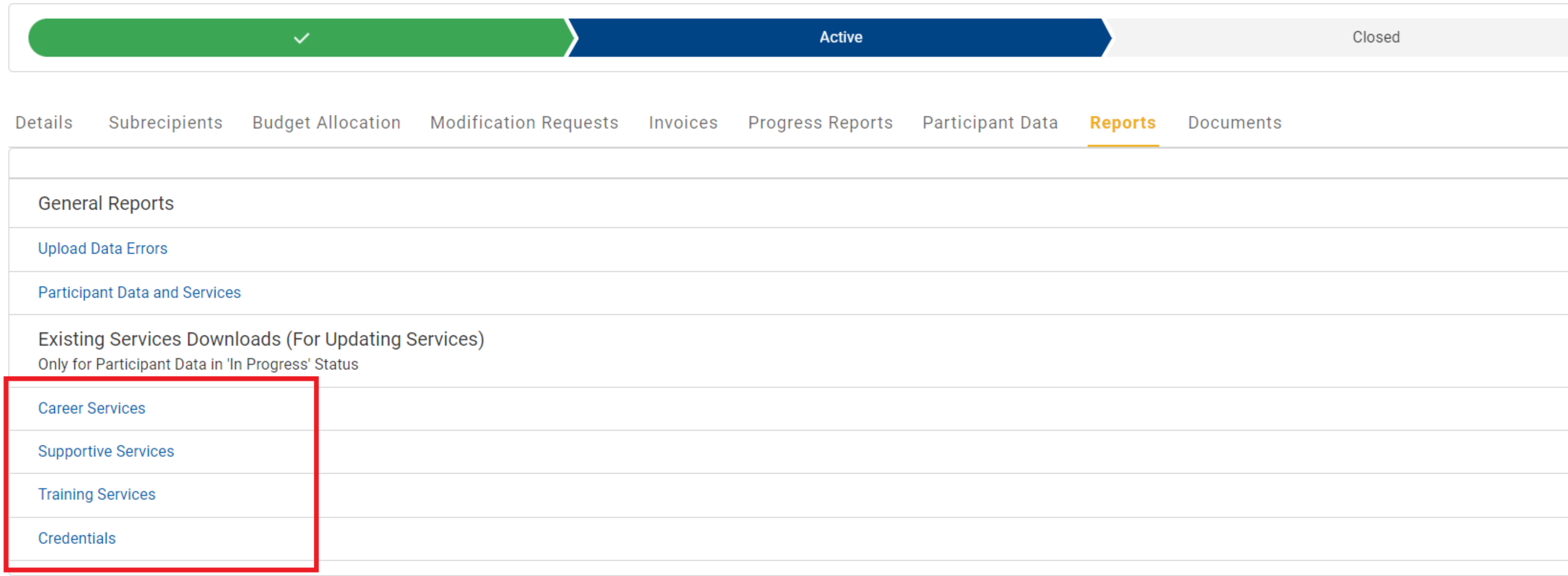
Statuses of services can be updated in bulk by accessing the appropriate reports under the **Grants** tab in Cal-E-Grants.



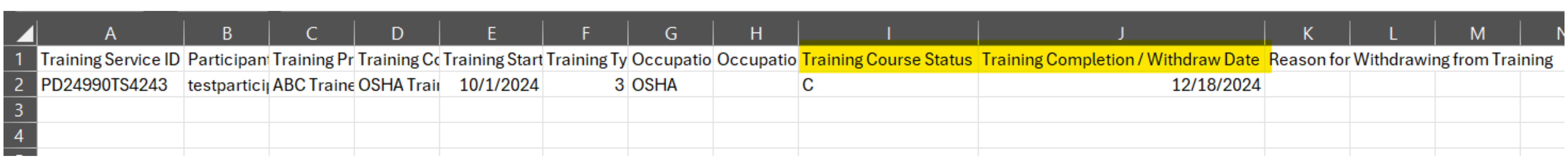
1. Select the appropriate **Grant ID**.



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



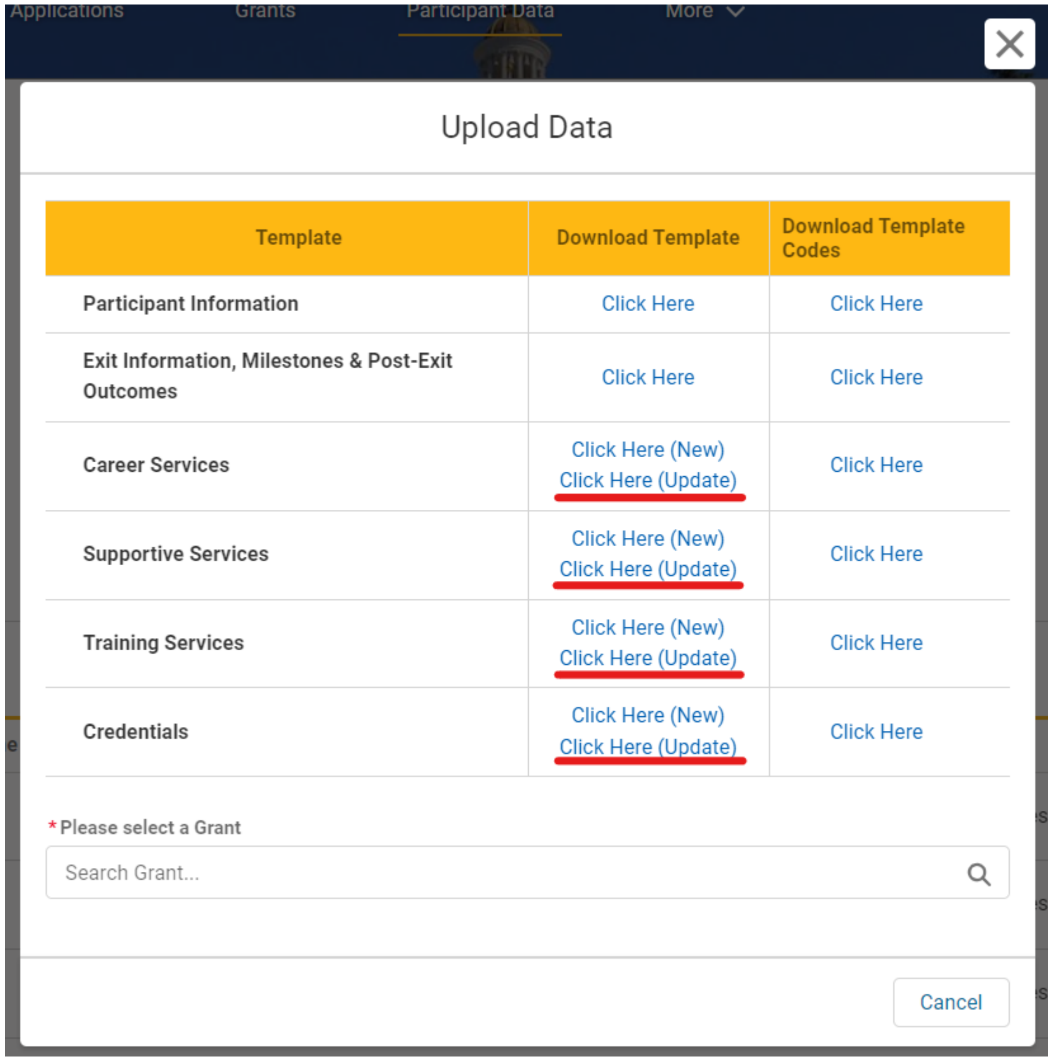
3. Update the **Service Status** and **Completion/Withdrawal Date** directly in the prefilled template before re-uploading to Cal-E-Grants, following the steps outlined above.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Training Service ID	Participan	Training Pr	Training Co	Training Start	Training Ty	Occupatio	Occupatio	Training Course Status	Training Completion / Withdraw Date	Reason for Withdrawing from Training		
2	PD24990TS4243	testpartici	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.

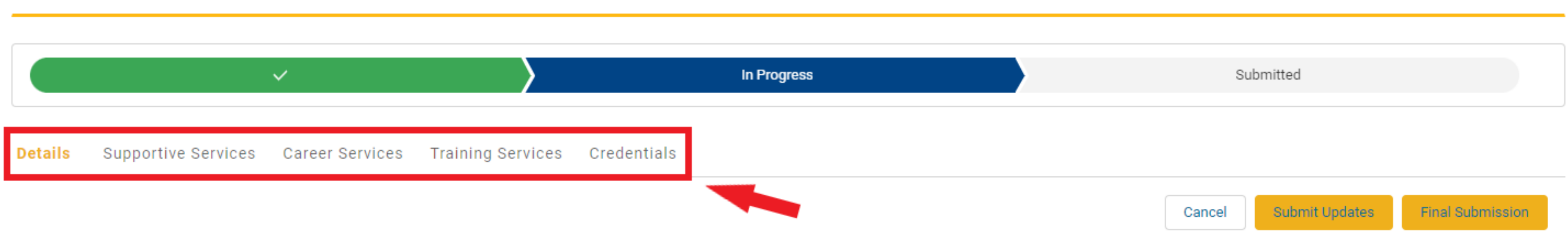


The blank **Update Template** allows services to be entered as they are completed. Service IDs can be copied and pasted from the prefilled templates or entered manually. Once all fields have been completed, the template can be uploaded to the system. To avoid errors, details will need to match what has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

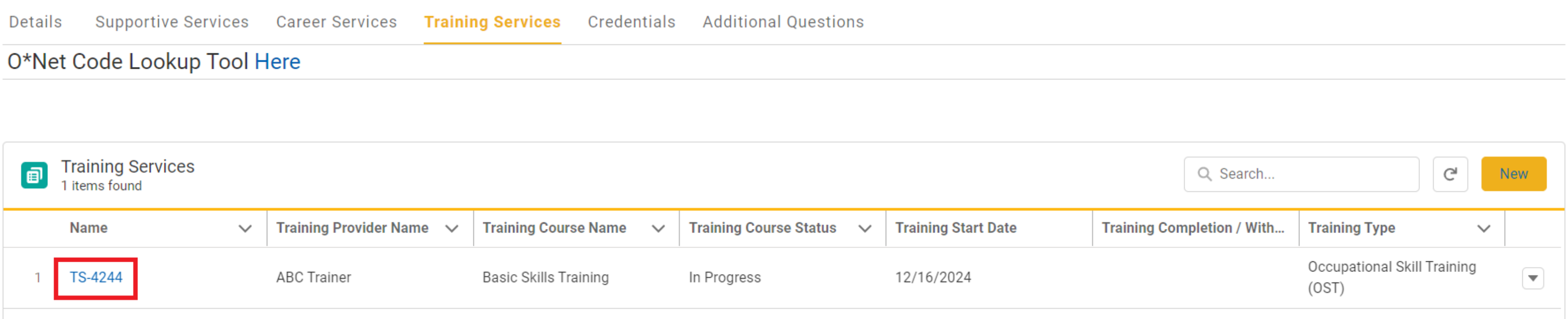
	A	B	C	D	E	F	G	
1	Training Service ID	Participant ID	Training Provider Name	Training Course Name	Training Start Date	Training Type	Occupation of Training (Description)	Occ
2								
3								
4								
5								
6								
7								

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.



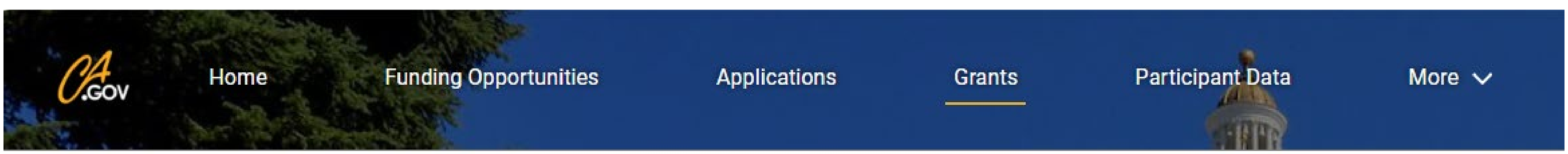
Once on the appropriate Service tab, the System Generated Service Names are located in the *Name* column.



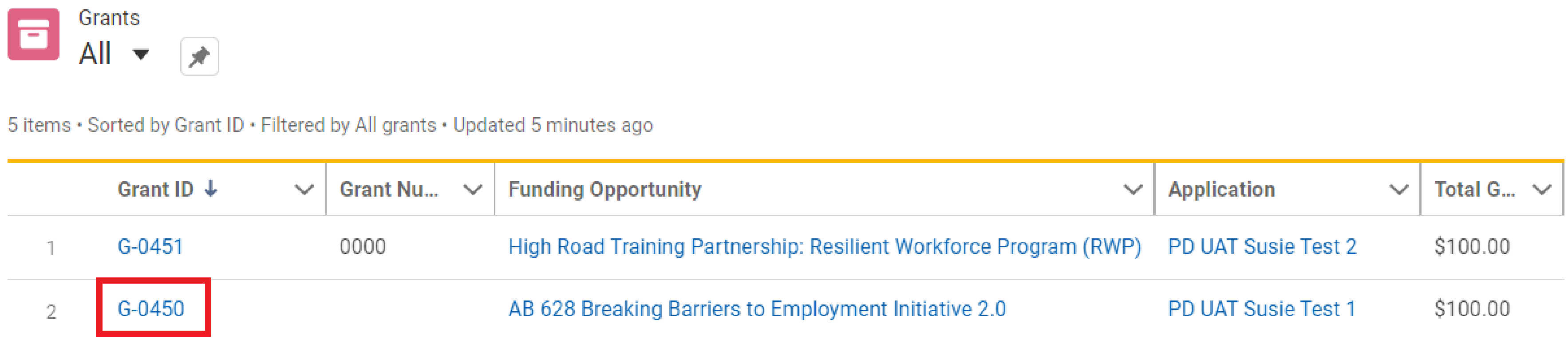
FINAL SUBMISSION

Access via Grants Tab (Recommended)

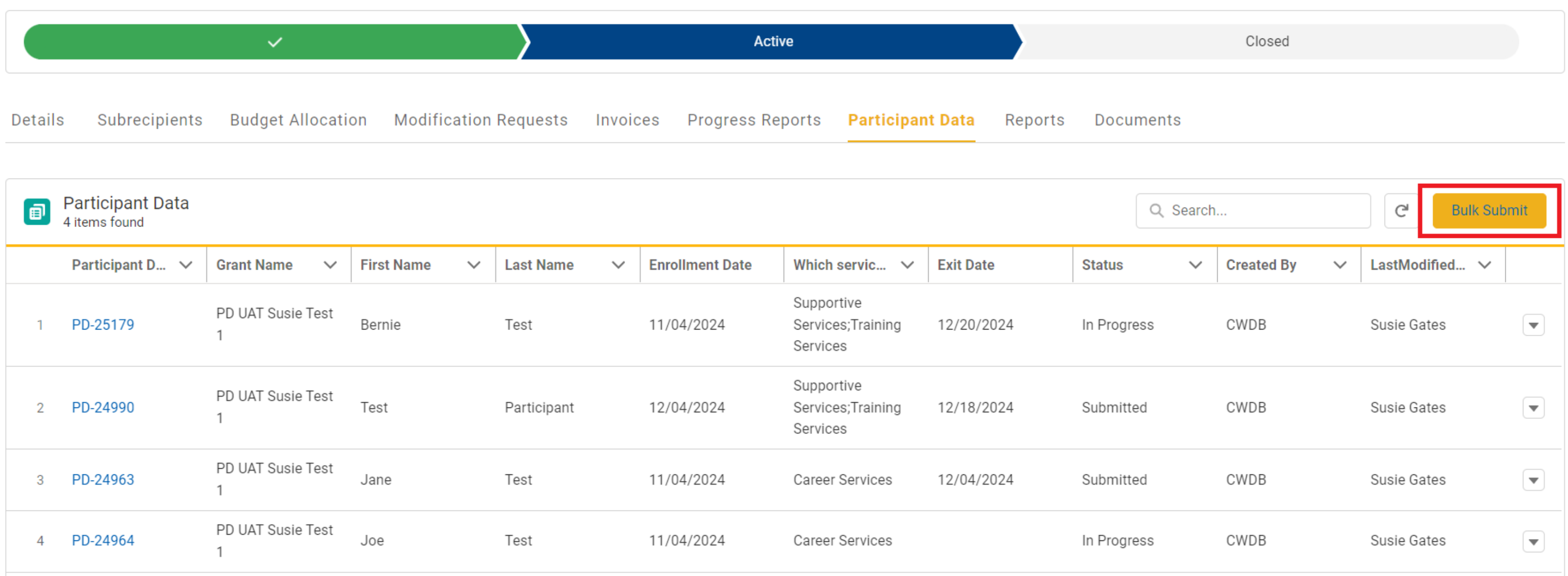
After participants exit a program and are no longer receiving services, participant entries can be closed out using the bulk **Final Submission** function under the **Grants** tab in Cal-E-Grants.



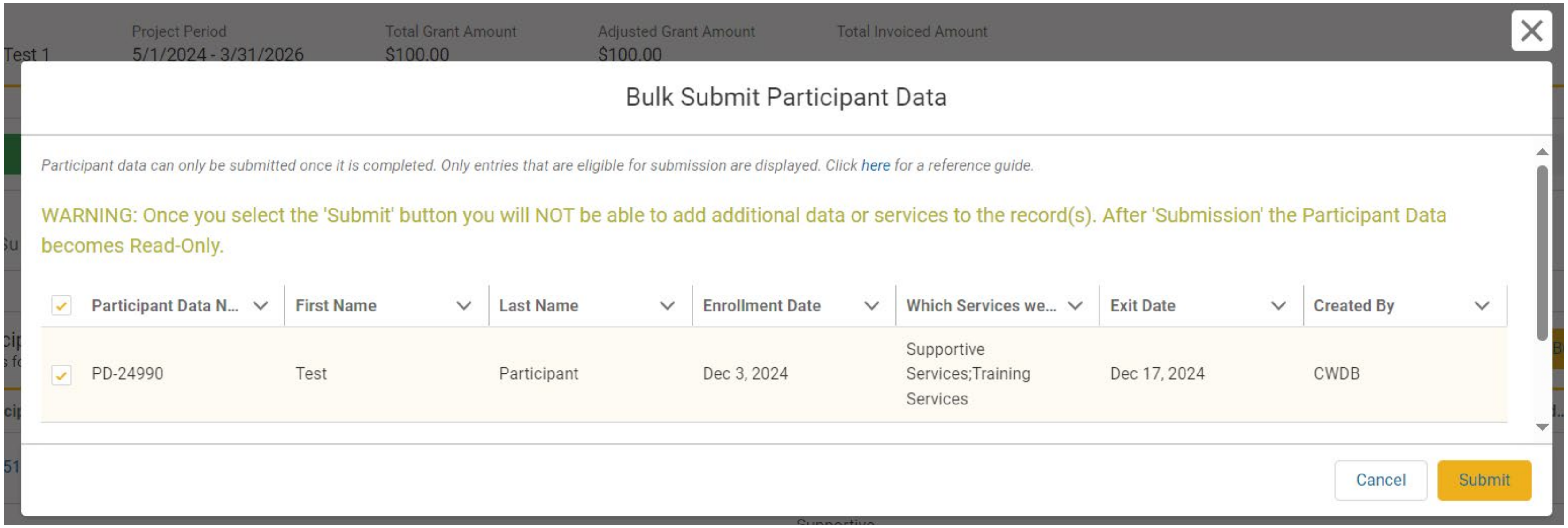
1. Select the appropriate **Grant ID**.



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

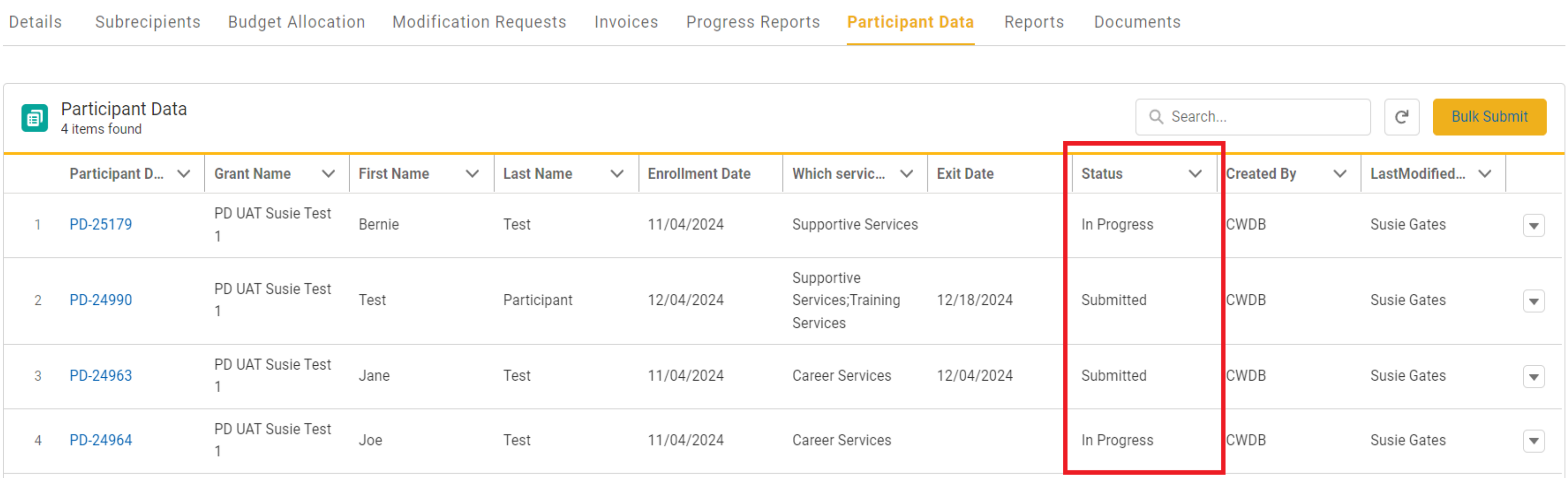


3. Once the Bulk Submit button is selected, a popup window will appear listing participants eligible to be submitted. Select check boxes for participants being closed out, then select the **Submit** button.



***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.


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

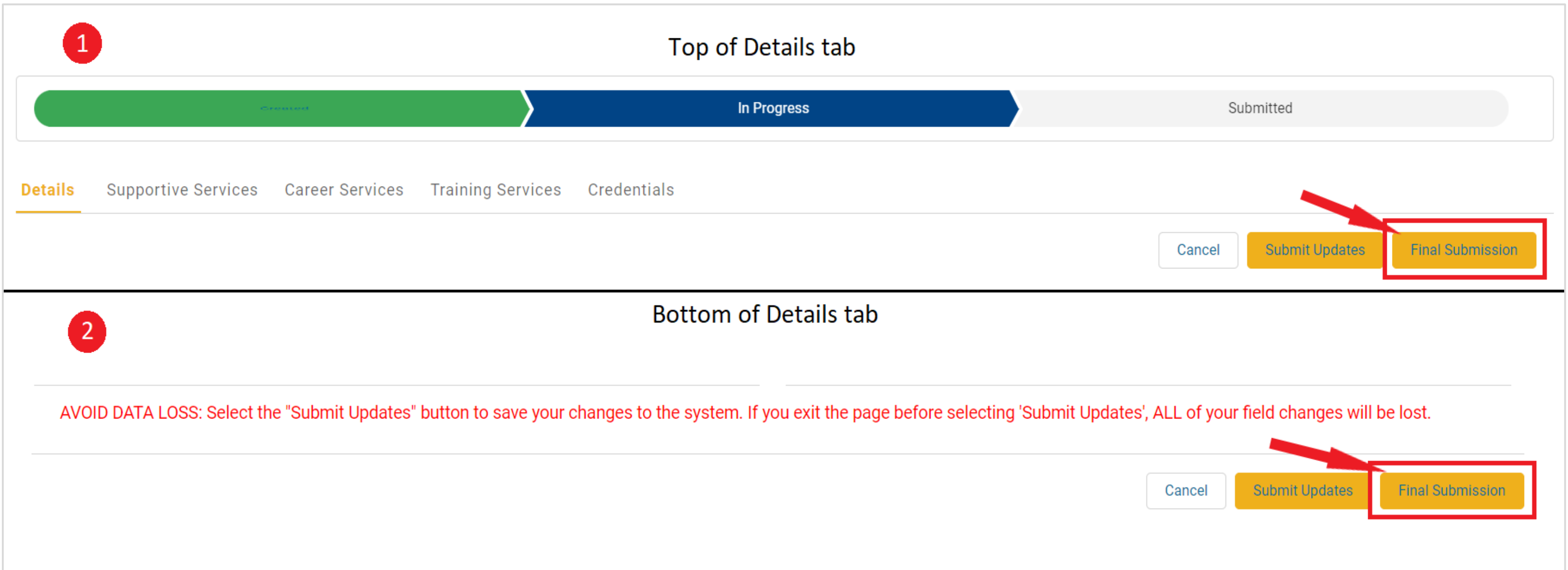
Participant Data
4 items found

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		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

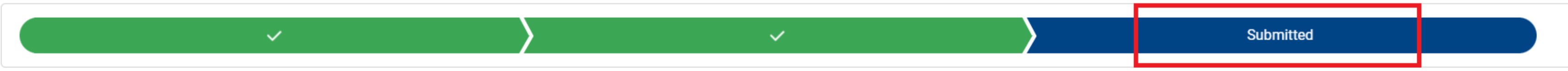
Access via the Participant Data Detail Page

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.



***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*.



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	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 no later than the 20th of the month following the prior monthly reporting period, 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 <u>all</u> participants by the end of the grant term.