CAL-E-GRANTS PARTICIPANT DATA PORTAL

Frequently Asked Questions as of October 7, 2025

Contents

Introduction to the Cal-E-Grants Participant Data Reporting Portal

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

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

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

A2: Much of the same data that was captured in the State Grant Data Solution (SGDS) must also be entered into the Cal-E-Grants participant data portal. The Cal-E-Grants portal, however, also offers automated data validation and improved cloud-based data reporting interface.

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

A3: The Cal-E-Grants participant data module does not currently feature case management tools. Case management features such as uploading documentation and adding case notes are planned in future versions of the portal and are expected to be launched in future rollouts of the platform.

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

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

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

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

Q6: How are participants enrolled?

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

Q7: What is considered participant data?

A7: Individual level data, including demographics, services and/or credentials received, and outcomes. The CWDB does collect certain sensitive demographic information from participants. To align with federal standards, sensitive information collected by CWDB includes, but is not limited to, Social Security Numbers (SSNs), gender identity, sexual orientation, and public benefit recipiency. Reporting SSNs allows CWDB to match employment information through state databases, which facilitates the measurement of employment-related outcomes. Supplying demographic information related to gender identity, sexual orientation, and public benefit recipiency provides CWDB with more accurate insight into the communities its funding serves. Without any of this information, CWDB cannot fully understand how helpful grant programs are for participants.

Participants can always opt out of sharing such information, and services can never be denied if participants choose to opt out. Once grant funds are accepted, grantees are contractually required to collect and report demographic information provided by their participants.

Transitioning to the Cal-E-Grants Participant Data Reporting Portal

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

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

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

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

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

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

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

A11: Grantees will have until 09/01/2024 to migrate any existing data from CalJOBS/SGDS to the new Cal-E-Grants system. The CWDB Research Unit will be available upon request to provide guidance on data migration and individualized technical assistance as needed. If more time is needed to migrate existing data to the new system, please contact the Research Unit.

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

A12: Grantees may enter data into Cal-E-Grants either in real-time or in batches monthly. For instance, real-time data reporting involves entering the details of each participant as they are onboarded. On the other hand, batch data reporting entails collecting the details of multiple onboarded participants and reporting the data at once. If uploading data, please refer to the reporting schedule below, follow the same schedule as invoice submission, and report any data occurring within a particular month by the 20th of the following month. The schedule below outlines reporting periods and deadlines for the calendar year. It's important to note that data should only be entered for activities and events that have already occurred. Planned activities or expected outcomes should not be reported.

Reporting Period	Reporting Deadline
January 1 – January 31	February 20
February 1 – February 28	March 20
March 1 – March 31	April 20
April 1 – April 30	May 20
May 1 – May 31	June 20
June 1 – June 30	July 20
July 1 – July 31	August 20
August 1 – August 31	September 20
September 1 – September 30	October 20
October 1 – October 31	November 20
November 1 – November 30	December 20
December 1 – December 31	January 20

Q13: Is there a 30-day deadline similar to CalJOBS for enrolling participants in the new system?

A13: There is no deadline or time limit for when the participant data must be entered. However, we ask that participant data be entered at least once per month no later than the 20th of the following month. Reporting deadlines have recently changed, and data will be checked by CWDB monthly.

Q14: Are supplemental reports still required to be submitted?

A14: No, supplemental reports are not currently required to be submitted. Grant-specific questions that replaced supplemental reports can be accessed under the Additional Questions tab in Cal-E-Grants. The additional questions are intended to capture data not collected elsewhere in Cal-E-Grants, but may not apply to all participants. If the question does not apply to a certain participant, it may be left blank for that individual.

Account Configurations and Setup

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

A15: Your organization's grant administrator can create new accounts in CEG for data entry as needed. In some cases, the fiscal agent will control how partner agencies enter the data.

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

A16: Accounts in CEG are tied to lead fiscal agents for access to grants. Fiscal agents now can grant 'Subrecipient' access to organizations that have existing CEG accounts that are already linked to other Fiscal Agents for participant data reporting purposes on particular grant programs. Adding subrecipients is done through the Subrecipient tab in Cal-E-Grants. Please refer to the Grant Sharing Reference Guide or contact your Program Analyst for additional guidance.

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

A17: The system allows for flexibility in data entry. Each board/organization can choose to enter data independently or have a centralized approach, depending on their comfort level and workflows. Please refer to the Manage Users Reference Guide for instructions on adding users with varying levels of privilege in Cal-E-Grants. Users added under a particular organization will have access to all grant programs the agency is a part of.

Q18: Is there a cap on users that can be added in CEG?

A18: No, there is no cap on the number of users that can be added to CEG.

Features and Data Entry

Q19: Will all grantees across grant programs be required to submit the same data fields? Are there any special data fields required for certain grants?

A19: Yes, grantees are required to report the same demographic, service delivery, and outcome information across grants and can use the same upload templates across grant programs. Each participant has grant-specific questions on the Additional Questions tab, which currently need to be answered manually.

Q20: We co-enroll between grants. For example, a participant can be served by both P2E and RERP at the same time if they are eligible and need the services (e.g., Training Services out of RERP and Supportive Services out of P2E). Will we have to enter the same participant data separately for both grants, or is there a way to add multiple grants to one participant and indicate which activities were provided for which grant?

A20: Co-enrollment in multiple grant programs is allowed if a participant meets eligibility requirements, but the participant's information must be entered for both grants. The system will not auto-populate the participant's information for both grant programs, even if both programs are in CEG. A participant's name must be entered exactly the same when enrolling them into different grant programs. Co-enrollment across CalJOBS and CEG (for example, WAF and P2E) will also require entry in both platforms.

Q21: Should services be reported as individual services, or can services be bundled?

A21: In general, services should be reported individually for analytical purposes. If many services are bundled together, it may become unrealistic to report individual services for all participants. In such cases, services can be reported as "bundles", provided the bundles are consistently named and defined across all participants. It's recommended to thoroughly define these service bundles in your narrative reports to ensure clarity and consistency. However, supportive services should always be entered individually.

Q22: Can I save my data entry progress in Cal-E-Grants and continue later?

A22: Cal-E-Grants supports saving data entry progress as sections are completed. Each individual section must be completed before progress can be saved. Partial sections cannot be saved. However, not all sections need to be completed simultaneously.

Q23: Can data be overwritten while using the data upload functionality?

A23: Yes, when a field is editable in the system, data can be overwritten when using the upload function. Below is a list of editable fields on the service tabs.

Career Services

- Type of Internship / Work Experience
- Career Service Status
- Service Completion or Withdraw Date

Supportive Services

- Supportive Service Status

Training Services

- Training Completion / Withdraw Date
- Training Course Status
- Reason for Withdrawing from Training

Credentials

- Has Participant received a Credential?
- Date Attained Recognized Credential
- Credential Name
- Credential Type

Alternatively, the only fields that you **CANNOT** edit on the Participant Information tab are as follows:

- Name
- DOB

All other fields in the Participant Information and Exit Information sections should be editable via bulk upload. If you attempt to update a field that is not editable, you will receive an error, and the system will not save the change. Please refer to the Bulk Upload Data Entry Guide for more information about the process.

Q24: How should income be reported if the participant reports an income range instead of a single income figure?

A24: Individual and household income should be reported as a single income figure. The portal does not support income ranges. If an income range is received from the participants, an average of that range should be reported.

Q25: Do the same code durations need to be used as in CalJOBS? For instance, do some services need to be closed on the same day?

A25: No, Cal-E-Grants provides more flexibility than CalJOBS, and services are not tied to a "clock." We just need to know which services were provided.

Q26: How are SSNs handled in the new system, as well as pseudo-SSNs?

A26: SSNs are not required to be entered, although CWDB requests that information for important base wage file information. Depending on the type of data entry, if a participant does not have an SSN, staff will have the option to leave the field blank when batch uploading data or selecting 'No,' indicating the participant doesn't have an SSN when manually entering data. There is no need for partial or pseudo-SSNs in CEG.

Q27: Will Cal-E-Grants require the same document verification/uploading as CalJOBS?

A27: CWDB does not require verification documentation regarding eligibility to be uploaded to CEG. However, such documentation would be required in certain circumstances involving a monitoring/auditing situation, which wouldn't come from CWDB. Since there is always the possibility of an audit from other state agencies, CWDB recommends collecting and securely storing such documentation, but currently, there is no place to save the documents in CEG.

Please refer to the Cal-E-Grants Source Documentation List for a complete list of available documents that can be collected to verify participant eligibility when available. The document provides an exhaustive list of suggestions in alignment with WIOA standards; but documentation is not required for all the data points included in the list for state-funded programs.

Q28: If, for any reason, there is an empty cell in our data, will there be an error message? If so, how do we avoid that issue?

A28: You will receive an error message if the field is required and the system does not accept the data that was submitted. If batch uploading, the sheet will need to be corrected and reuploaded. The system has added options for participants to opt out of providing information unrelated to eligibility; however, grantees are still obligated to request all required fields.

Q29: If participants aren't exited when they become employed, can we return at a future date to complete the post-exit information?

A29: Yes, there is no deadline for when participants must be exited, and when the data is entered is up to the organization. However, using the final submission button will "submit" the participant's data and lock it from future editing. Therefore, please use the final submission button only for participants who have finished receiving services (including wraparound services) and have fully exited the program.

Q30: What if participants stop showing up for services and become unreachable before we have collected all the data?

A30: In such cases, please enter the available data, and use the 'No' or 'NA' options as needed. Keep in mind, all participants must be final submitted within 30 days of the close of the grant, including participants that may not have successfully completed the program.

Q31: Can we use the participant IDs created in CalJOBS or the State Grant Data Solution (SGDS) for our existing participants?

A31: Participant IDs will not be the same as the ones you have been using and will be generated by the system **after** the participant information has been successfully entered or uploaded. The participant ID generated by the system will also be used for subsequent tabs when batch-uploading data.

Q32: What is included in the templates that we download from CEG? What is the difference between the template and the codebook?

A32: For batch uploads, separate templates in CEG contain the variables collected on the specified tab. The codebook must be referenced to enter the correct code into the corresponding template that the system will recognize. As a best practice, we recommend downloading a fresh codebook at least once per quarter to ensure the most up-to-date codes are being used. Any system-level changes made are typically reflected in the codebooks, and they are updated from time to time without notice.

Q33: Can we switch between batch uploading data and manually entering participant data?

A33: Yes, each approach can be used interchangeably depending on what is appropriate for the scenario. The system won't accept duplicate information, but as long as new data is being entered, either method can be used.

Q34: Are the templates downloadable files, or is the participant data entered through an application?

A34: The templates and the codebooks are downloadable files from the Cal-E-Grants desktop site when batch uploading participant data. Data can also be manually entered individually by using the desktop site.

Q35: When we download the templates from Cal-E-Grants, they are in .csv format. Do they need to be in .csv format when they are uploaded?

A35: Yes. When it is uploaded to CEG, the template must be in .csv format. If it is not that file type, an error message will appear, and the system will not accept the file.

Q36: Can case notes be entered in CEG?

A36: Not at this time. Hopefully, that functionality will be added to future version rollouts as the platform moves toward a full case management system.

Q37: Does the system generate exportable reports?

A37: Yes, grantees can export a 'Participant List' on the *Participant Data* module landing page as well as a 'Participant Data and Services Report' by accessing the *More* tab on the navigation bar and selecting *Reports*.

Q38: Is there a way to capture target population information?

A38: Yes. Most target population information is captured in Cal-E-Grants in the Participant Information section/template. Grantees should refer to the *Additional Questions* tab to ensure data not reported elsewhere is captured (for example: religious minorities).

Q39: Upon program exit, which field would we use to document their exit in the Exit Information, Milestone, and Post-Exit Outcomes template when bulk uploading?

A39: Upon program exit, please use the Exit Date field to indicate when a participant completed receiving services in the Exit Information, Milestones, and Post-Exit Outcomes template. When a participant has entirely finished receiving services entirely, and no more data needs to be entered for that individual, the entry can be '*Final Submitted*.' Once a participant's entry has been final submitted, grantees are locked out from adding any additional data, and what has been entered becomes read-only.

Q40: What should be entered if a participant/youth does not have a household income?

A40: If a household has no income, enter 0. If a participant refuses to answer the question regarding household income or the information is unavailable, enter 99.

Q41: There are two places in CEG to enter the post-exit O*NET code, Training and Post-Exit; where should it be entered? And what if a participant hasn't exited?

A41: The training O*NET code is optional for participants who haven't exited; just enter it in the exit information section. If a participant is unemployed upon exit, please enter "NA" in the O*NET code field.

Q42: Should grantees provide employment information on the Exit Information, Milestone, and Post-Exit Outcomes template before a participant has exited the program?

A42: Yes, if the employment (or other outcome) results from the services that were delivered. Grantees can report outcomes as they are achieved, even if the participant is still enrolled.

Learning and Support

Q43: How can grantees learn to use the Cal-E-Grants System?

A43: Grantees can access instruction manuals, the 2025 office hour schedule, and a video tutorial on the various aspects of using the Cal-E-Grants data reporting portal on the Participant Data Guidance webpage. Additionally, grantees can contact the CWDB Research team directly for technical assistance by emailing ResearchUnit@cwdb.ca.gov.

Q44: How do I request corrections to data I have already entered in Cal-E-Grants?

A44: For updates grantees cannot make themselves, changes can be requested by contacting the Research Unit with the details of the change and the reason for the change(s). Please include the grant program in the email's subject line and detail the participant's name and the exact changes that need to be made in the request.

Q45: Who can help address Cal-E-Grants account issues?

A45: Grant administrators in CEG should be able to manage and add users within their organization. For account issues, users can email the Research Unit for assistance.

Q46: How can users provide feedback on the system and suggest improvements?

A46: Users can provide feedback on the new system and suggest improvements by directly contacting the Research Unit. Feedback is valuable for enhancing the system based on user needs and experiences. Suggestions for improvement are welcome and will be considered for future updates.

Q47: Is there a plan to support grantees through the transition and address concerns about data entry efficiency?

A47: Yes, the leadership team is open to suggestions and feedback to make the transition as smooth as possible. Upon request, training and support will be provided to ensure that grantees can effectively use the new system.

Q48: Are previous data systems still available to use?

A48: CWDB is not disabling CalJOBS or SGDS, so they will remain accessible to ease the transition to the new data system. However, state-funded grant programs must now use Cal-E-Grants for participant data reporting. Grantees are no longer required to submit SGDS workbooks, as all state-funded grant programs have transitioned to CEG for participant data reporting.

Q49: Are there any specific eligibility requirements outside of the variables that are collected in CEG?

A49: For more information about eligibility, refer to the Request for Applications (RFA) for your grant program. CEG does not have specific eligibility requirements, but serves as an information bank to collect any entered data.

Q50: Some of the required fields in CEG include information that we did not collect in the past, so what should we do in that situation?

A50: If certain variables were not included in a previous data collection system, please use the 'NA' options in Cal-E-Grants for data migration purposes.

Q51: What would be the best way to update that contact information for future training and participant data communications?

A51: Please contact the appropriate Program Implementation team at CWDB to update any specific point of contact information. If you are unsure which team to contact, you may reach out to the Research team, who can direct you to the correct team.

Q52: How do you suggest collecting some of the highly sensitive data?

A52: Some suggestions when collecting sensitive information include the following: create a self-administered survey or application as part of the intake process, assure confidentiality, explain why you are asking for the information, put your demographic questions at the end, and present sensitive questions toward the end (but not the very end). This is not an exhaustive list, nor is it mandatory to collect sensitive information this way. However, these approaches may make participants and staff feel more at ease when collecting sensitive and important information. Please refer to the Data Reporting Toolkit for more information on best practices and approaches.

Q53: How can we delete test participants?

A53: Please keep track of any test participants entered in CEG and email the list to the Research Unit. They will be able to delete the test participants from Cal-E-Grants.

Q54: Who should we reach out to with questions regarding semi-annual reporting?

A54: Your Program Analyst is the best resource to contact with any questions related to semi-annual reporting.

Q55: How should the Source Documentation List be used for state-funded grant programs?

A55: For state-funded programs, the *Source Documentation List* provides an exhaustive list of suggestions for documentation that can be collected to verify participant eligibility. Documentation is not required for all data elements included in the list, but it outlines suggestions of what can be collected from participants if available.

Q56: Are partners/spokes able to reach out to the Research team directly?

A56: Reaching out directly to the Research team is up to grantees and what works best for their organization(s). We respond to all inquiries submitted to the Research Unit inbox. However, as a best practice, if a partner or spoke is reaching out to the Research team directly, they may also want to copy the fiscal lead or hub on the thread.