



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

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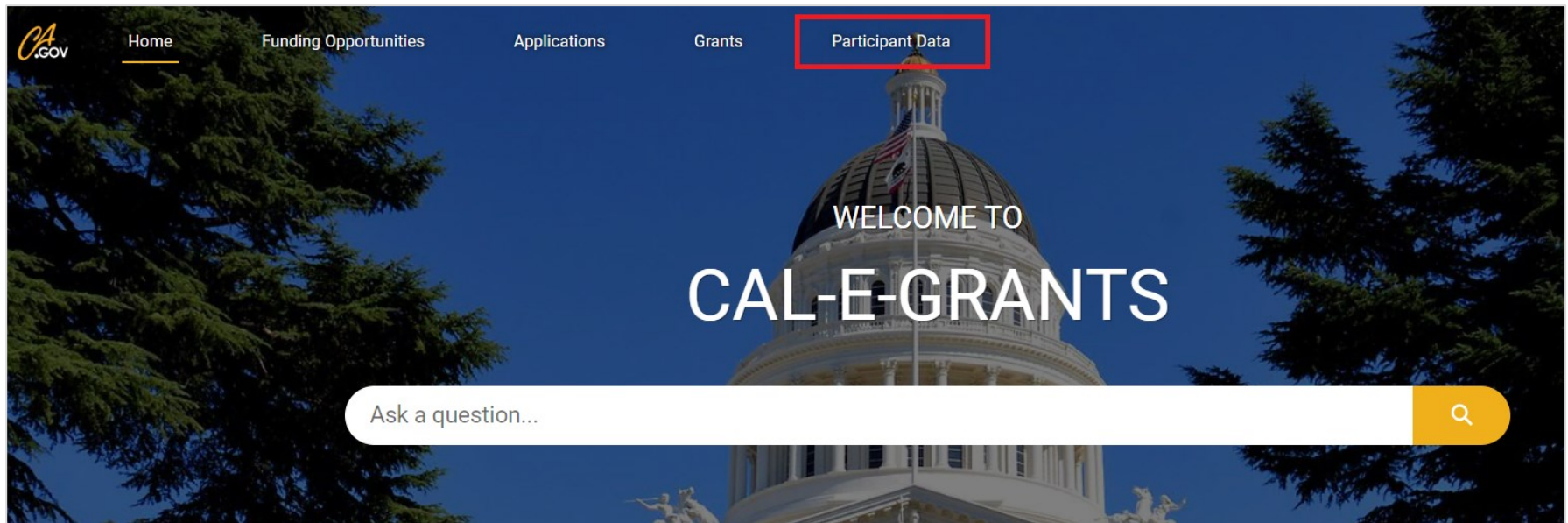
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Participant Data can be uploaded or added manually to Cal-E-Grants once logged into the system. To manually enter data, follow the steps outlined below.

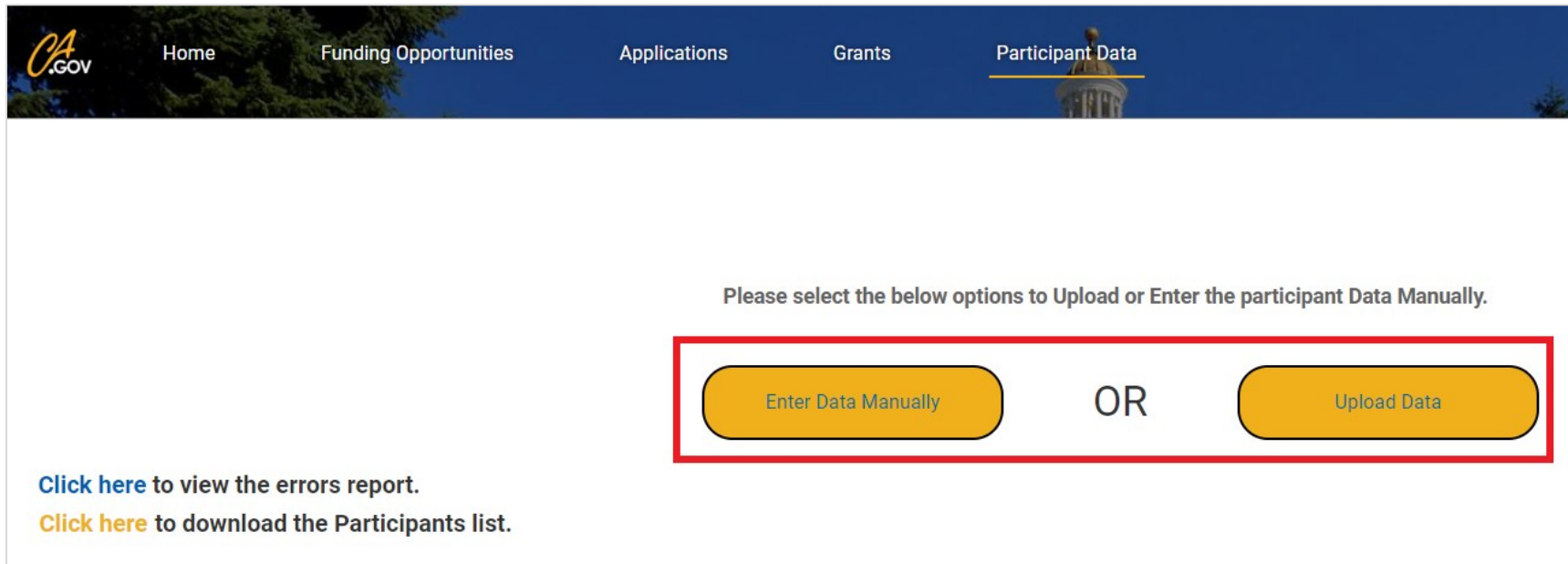
ACCESSING PARTICIPANT DATA: MANUAL ENTRY

Access via the Participant Data Tab

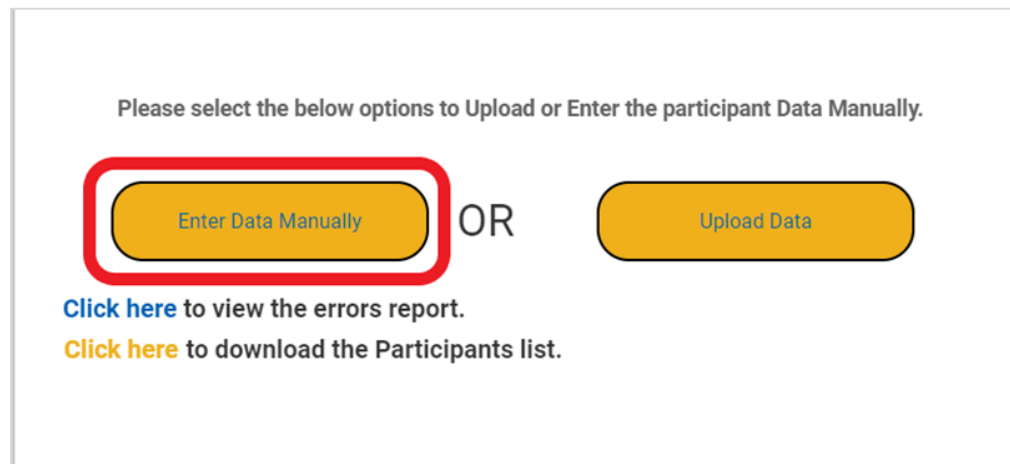
1. Select the **Participant Data** tab at the top of the Cal-E-Grants landing page.



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

Search Grant

* First Name

* Last Name

* Date of Birth

* Do you have SSN?

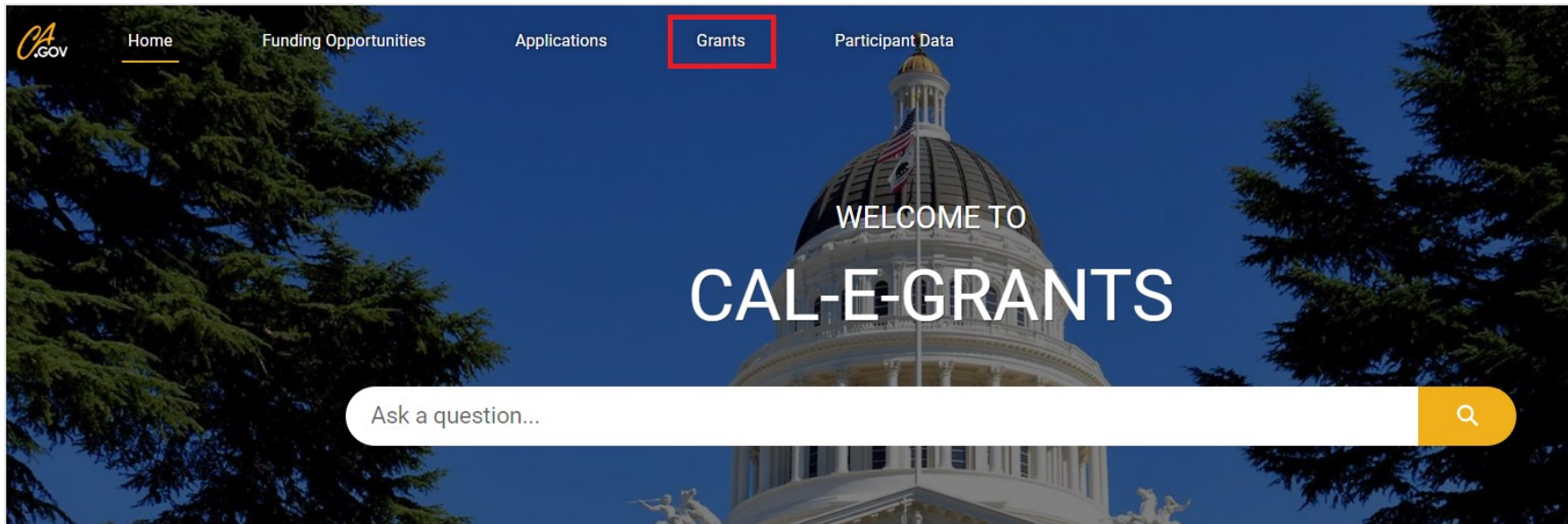
Select an option

Close

Save

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.

Grants

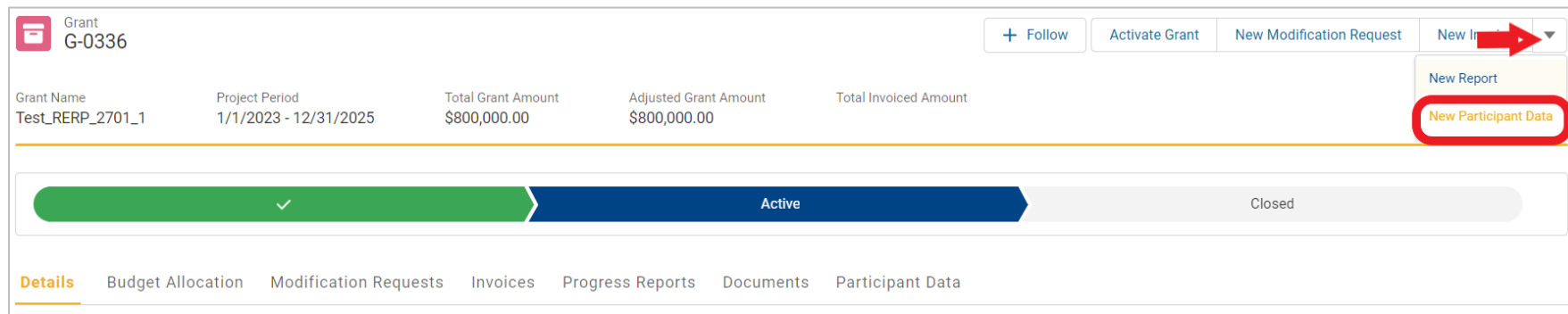
All ▾

1 item • Sorted by Grant ID • Filtered by All grants • Updated a few seconds ago

Search this list...

	Grant ID ↑ ▾	Grant Num... ▾	Funding Opportunity ▾	Application ▾	Total Grant Am... ▾	Status ▾	Record Type ▾	Created Date ▾
1	G-0336	G-RERP1	Regional Equity and Recovery Partnership	Test_RERP_2701_1	\$800,000.00	Active	RERP - Regional Project	1/3/2024 12:12 PM

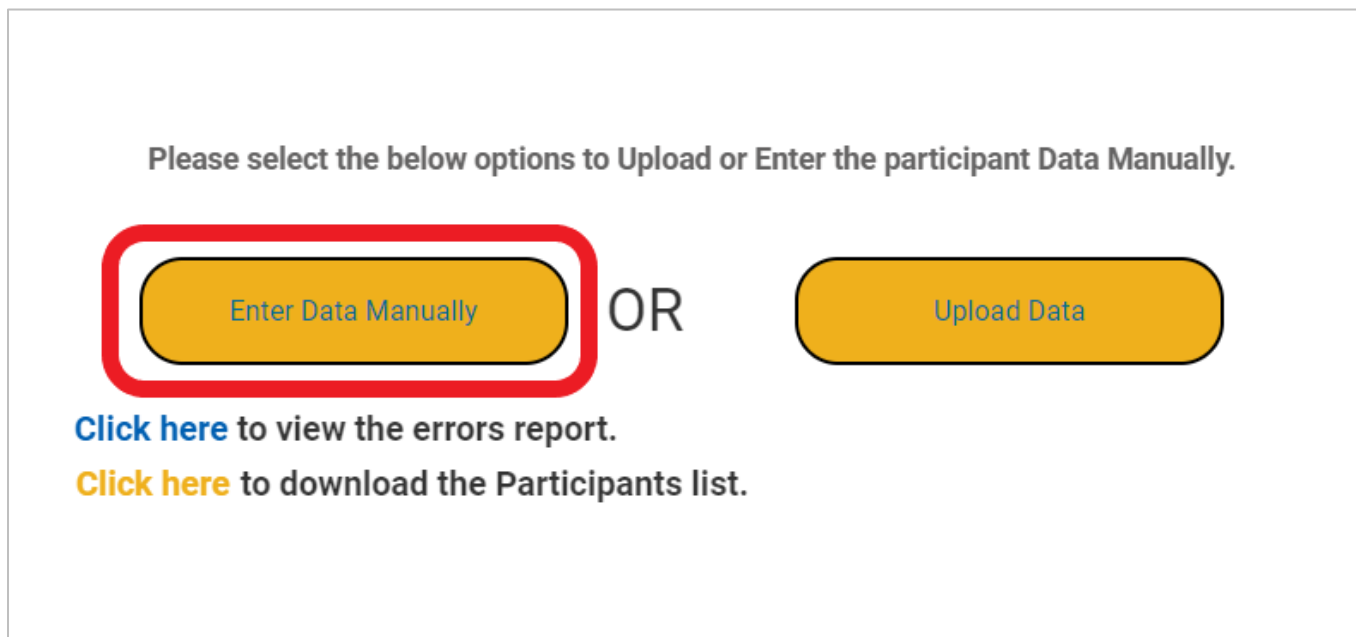
3. Select the drop-down arrow and then **New Participant Data** on the right-hand side of the Grant page.



The screenshot shows the 'Grant G-0336' page. At the top right, there is a dropdown menu with a red arrow pointing to it. Below the dropdown, the 'New Participant Data' option is highlighted with a red box. The page also displays grant details: Grant Name (Test_RERP_2701_1), Project Period (1/1/2023 - 12/31/2025), Total Grant Amount (\$800,000.00), Adjusted Grant Amount (\$800,000.00), and Total Invoiced Amount. A progress bar at the bottom indicates the grant is 'Active'. The 'Participant Data' tab is selected in the bottom navigation bar.

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	

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



The screenshot shows a popup window with the text: 'Please select the below options to Upload or Enter the participant Data Manually.' Below this text, there are two buttons: 'Enter Data Manually' and 'Upload Data'. The 'Enter Data Manually' button is highlighted with a red box. Below the buttons, there are two links: 'Click here to view the errors report.' and 'Click here to download the Participants list.'

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

Search Grant

* First Name

* Last Name

* Date of Birth

* Do you have SSN?

Select an option

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

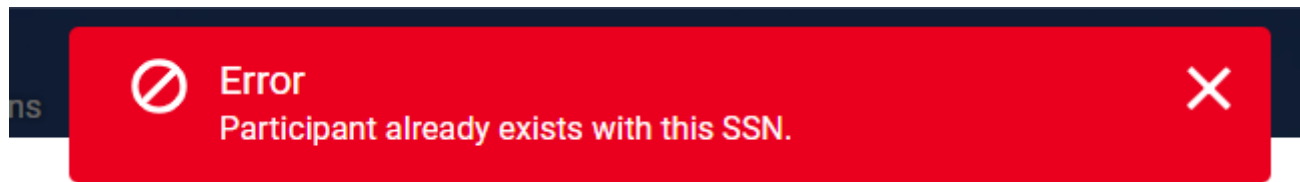
* Social Security Number

112233445

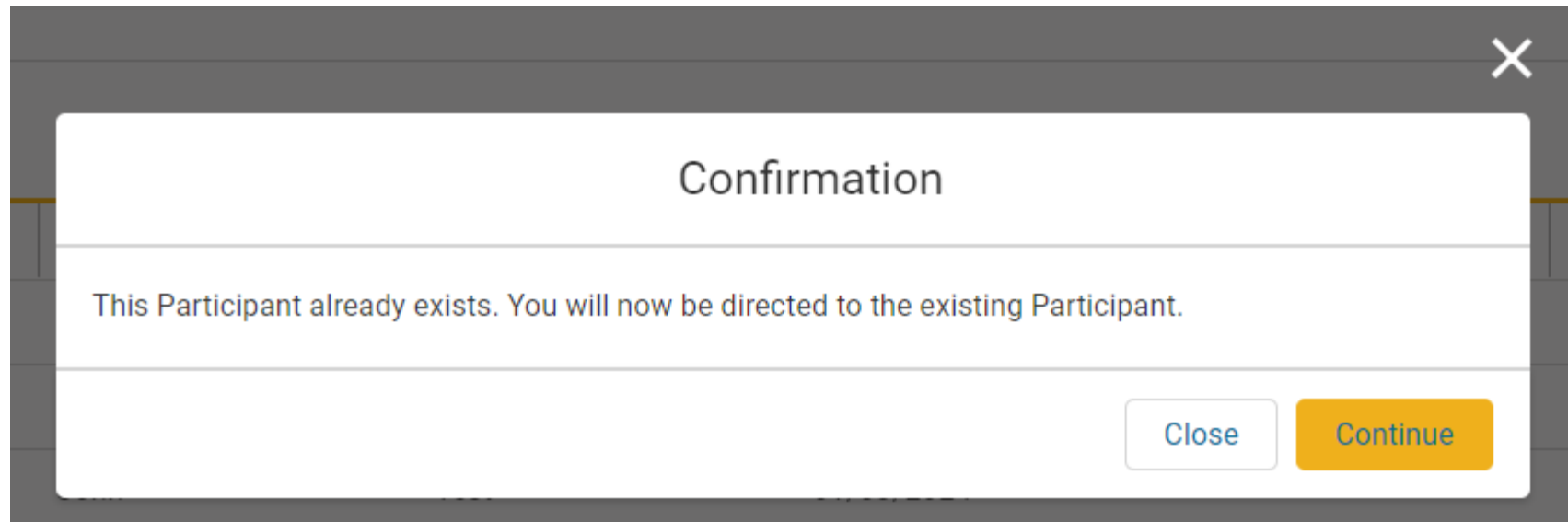
Close

Save

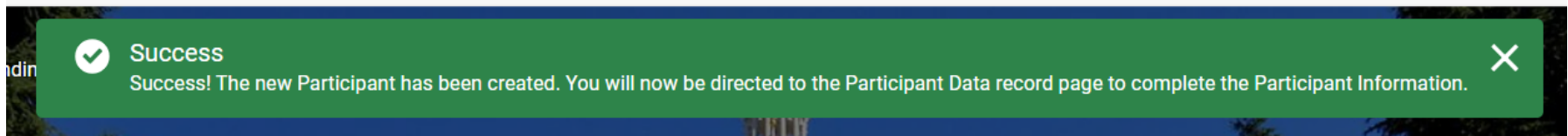
Three potential scenarios will occur once the **Save** button is selected:



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 the 'Participant Data' page. At the top is a dark blue navigation bar with the 'CA.gov' logo, links for Home, Funding Opportunities, Applications, Grants, Participant Data (highlighted), and More. A search icon and the name 'Khan Lam' are on the right. Below the navigation bar, a message says 'Please select the below options to Upload or Enter the participant Data Manually.' with two yellow buttons: 'Enter Data Manually' and 'Upload Data', separated by 'OR'. Below these are two links: 'Click here to view the errors report.' and 'Click here to download the Participants list.' The main content area features a table titled 'Participant Data' with '0 items found'. The table has columns: Participant Data Name, Grant Name, First Name, Last Name, Enrollment Date, Which services were pr..., and Exit Date. A search bar with a magnifying glass icon and the text 'Search...' is located at the top right of the table, highlighted with a red rectangle and a red arrow pointing to it.

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

Participant Data 6 items found								
Search...								
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.

Cancel

Submit Updates

Final Submission

▼ Participant Information

First Name
Joe

Date Of Birth ⓘ
12/4/2020

Middle Name

Address Line 2 ⓘ

* State ⓘ
CA

* Gender ⓘ
--None--

* Sexual Orientation ⓘ
--None--

Last Name
Doe

Social Security Number ⓘ
***-**-7777

* Address Line 1 ⓘ

* City ⓘ

* Zip Code ⓘ

* Transgender / Gender Nonconforming ⓘ
--None--

* Select Race / Ethnicity ⓘ

Available

American Indian / Alaska Native

Asian

Black / African American

Hispanic / Latinx

Chosen

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

* City ⓘ

* Zip Code ⓘ

* Transgender / Gender Nonconforming ⓘ
--None--

Whether or not the Participant identifies as transgender.

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

*** Select Race / Ethnicity** ⓘ

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

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

*Select Race / Ethnicity ⓘ

Available

- Asian
- Black / African American
- Hispanic / Latinx
- Middle Eastern or North African

Chosen

- American Indian / Alaska Native

An option must be selected

*Select Race / Ethnicity ⓘ

Available

- Black / African American
- Hispanic / Latinx
- Middle Eastern or North African
- Native Hawaiian

Chosen

- American Indian / Alaska Native
- Asian

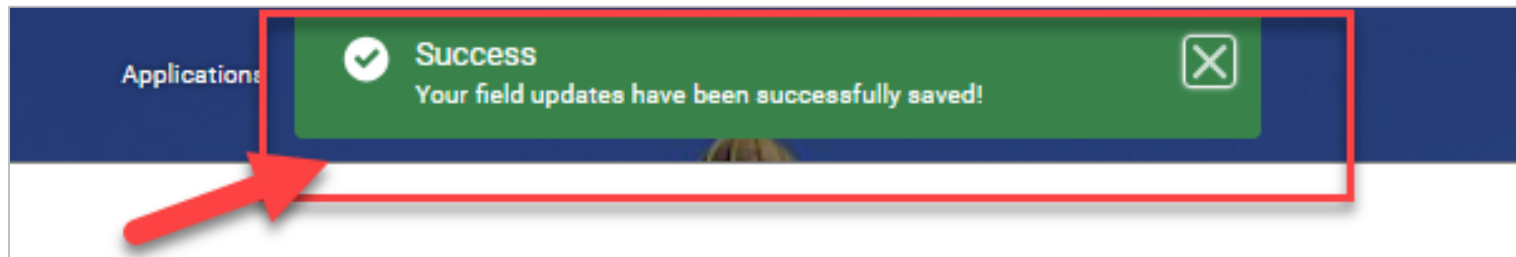
Note: Since this is a required field, an option must be selected. The correct selection must be moved to the **Chosen** box before the incorrect option can be removed.

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.

[Cancel](#) [Submit Updates](#) [Final Submission](#)

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 screenshot of the service entry interface. At the top, there is a progress bar 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, there are 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, there 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.

A screenshot of the 'Supportive Services' tab. The progress bar at the top is the same as in the previous image. The tabs below are 'Details', 'Supportive Services' (highlighted with an orange underline), 'Career Services', 'Training Services', and 'Credentials'. Below the tabs, there is a header section for 'Supportive Services' with a sub-header '0 items found'. To the right of the header is a search bar with the text 'Search...' and a 'New' button. The 'New' button is highlighted with a red box, and a red arrow points to it from the left. Below the header, there is a table with three columns: 'Name', 'Service Provider Name', and 'Supportive Service Name'. Each column has a dropdown arrow next to it.

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

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

New Supportive Services

*

 = Required Information

Information

* Service Provider Name ⓘ

Complete this field.

* Service Start Date ⓘ

Complete this field.

* Supportive Service Name ⓘ

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

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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

* Service Provider Name ⓘ

TEST

Read-only field.

* Service Start Date ⓘ

1/10/2024

* Supportive Service Name ⓘ

Housing Stipend

Read-only field.

* Supportive Service Status ⓘ

Completed

Supportive Service Type Information

* Supportive Service Name ⓘ

Housing Assi

Read-only field.

* Supportive Service Type ⓘ

* Service Provider Name ⓘ

⊘ We hit a snag.

Review the following fields

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

⊘

Cancel

Save & New

Save

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.

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UPDATING SERVICES

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

✓

In Progress

Submitted

Details

Supportive Services

Career Services

Training Services

Credentials

Additional Questions

Cancel

Submit Updates

Final Submission

Participant Information

First Name

Bernie

Last Name

Test

Date Of Birth

11/11/2001

Social Security Number

Middle Name

Address Line 1

321 Test

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

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

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

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

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

Training Course Status ⓘ

In Progress

Reason for Withdrawing from Training ⓘ

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 ⓘ

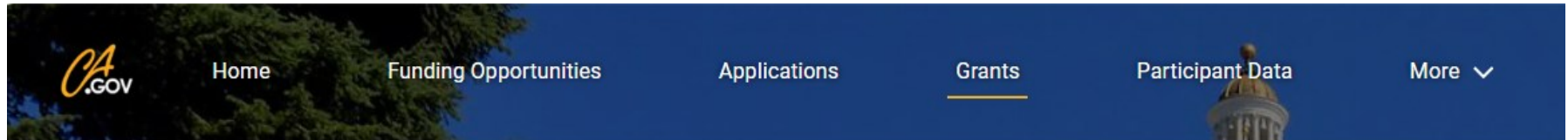
Cancel

Save

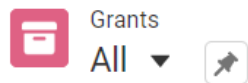
FINAL SUBMISSION

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.

✓

Active

Closed

DetailsSubrecipientsBudget AllocationModification RequestsInvoicesProgress ReportsParticipant DataReportsDocuments

Participant Data

4 items found

Q 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.

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

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.

☒ Participant Data N... ▾	First Name ▾	Last Name ▾	Enrollment Date ▾	Which Services we... ▾	Exit Date ▾	Created By ▾
☒ 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.

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 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 two sections of the Participant Data Detail Page. The top section, labeled 'Top of Details tab' with a red circle '1', features a progress bar with three segments: 'Completed' (green), 'In Progress' (blue), and 'Submitted' (grey). Below the progress bar are tabs for 'Details', 'Supportive Services', 'Career Services', 'Training Services', and 'Credentials'. At the bottom right of this section are three buttons: 'Cancel', 'Submit Updates', and 'Final Submission'. The 'Final Submission' button is highlighted with a red box and a red arrow. The bottom section, labeled 'Bottom of Details tab' with a red circle '2', 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'. The 'Final Submission' button is again highlighted with a red box and a red arrow.

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*.

✓

✓

Submitted

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.