



Welcome to the CalJOBS Training: Employer Services Part II.

This module will illustrate how Workforce Staff can use CalJOBS to assist employers.

## Learning Goals

- Create staff-assisted employer registration
- Navigate employer case management
- Enter employer activity codes and case notes
- Utilize the Message Center
- Utilize Employer Reports

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After completing this module, you will be able to:

1. Register an employer as a staff member
2. Navigate employer case management in the system
3. Enter employer activity codes to track services provided
4. Utilize the system's message center
5. Utilize employer related reports



## Staff-Assisted Employer Registration

Next, we'll see how staff can act on behalf of employers and assist employers.



While employers can complete multiple tasks using CalJOBS themselves, staff members can assist employers in completing tasks as well, including posting jobs and searching for qualified candidates. In doing this, staff assist employers and execute tasks on the employer's behalf.

To begin assisting an employer as a staff member, log in to the CalJOBS website with your username and password.

# Staff-Assisted Employer Registration

Welcome to My Staff Workspace Rianna Rose.  
This page allows you to customize the content you are interested in. Click on a button in the grid function from the menu on the left hand side of the screen.

Services for Workforce Staff

- Manage Individuals
- Manage Employers**
- Manage Résumés
- Manage Job Orders
- Manage Labor Exchange
- Manage Activities
- Manage Scan Card
- Manage Providers
- Manage Case Assignment
- Manage Profiling
- Manage Follow-Up

My Staff Dashboard | My Staff Resources | My Staff Account | Directory of Services

**Create an Employer**

- Assist an Employer
- Employer Access Rights
- Employers Posting Jobs
- Local Employer Sites
- One Case Note to Multiple Employers

List Title	Create Date
Case Management - Individuals	3/22/2017
Veteran in WIOA	3/23/2017

Staff Productivity by Program  
6/3 to 7/3

Program: GEN, Trade, WP, WIOA

Legend: Applicant (Blue), Participant (Red), Services (Yellow), Outcome (Green)

From the left menu, **Services for Workforce Staff**, hover over **Manage Employers**, and choose **Create an Employer**.

## Staff-Assisted Employer Registration

**CalJOBS** Select the Employer Services you are interested in accessing by either checking the box or clicking the link appropriate registration type. If you want to register for both Recruiting and Unemployment Services, check the *Continue Registration* button below.

Please specify the functionality that you wish to access.

Recruiting Services  
Perform labor exchange functions such as recruiting talent, posting jobs, online résumé search, applicant tracking and researching the local labor market.

Marketing Lead  
Create a Marketing Lead account for an organization that you wish to track for purposes of outreach and Customer Relationship Management (CRM)

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There are two registration types: **Recruiting Services** or **Marketing Lead**.

**Recruiting Services** refers to employers who want to register and post jobs to recruit candidates; these are also called “preferred” employers, because they have been vetted by the EDD staff. This module will cover registering an employer using the Recruiting Services access type.

The **Marketing Lead** registration type will put the employer in the system as a contact to be managed in the Customer Relationship Management module. If you register an employer as a marketing lead, that employer will not be able to post jobs or match with qualified candidates, and they will have very limited access to the system.

# Staff-Assisted Employer Registration

Please specify the functionality that you wish to access.



Recruiting Services

Perform labor exchange functions such as recruiting talent, posting jobs, online résumé search, applicant tracking and researching the local labor market.



Marketing Lead

Create a Marketing Lead account for an organization that you wish to track for purposes of outreach and Customer Relationship Management (CRM)

Continue Registration

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To register an employer into CalJOBS, select the first option, **Recruiting Services**, then select the “Continue Registration” button.

# Staff-Assisted Employer Registration

The screenshot displays a multi-step registration process for CalJOBS. The first step, 'Employer Identification', includes fields for 'Employment Development Department (EDD) Account #' and 'Confirm EDD Account #'. The second step, 'Staff Info', features dropdown menus for 'LWA / Region' (set to 'Los Angeles County Department of Community, and Se') and 'Office Location' (set to '00126 LA Works'). The third step, 'Login Information', contains fields for 'User Name' (filled with 'NEWEMPLOYER16') and 'Password'. A success message reads: 'A New Employer has been successfully registered. Please make a selection below to continue.' Below this message, a section titled 'What would you like to do next?' offers three options: 'Staff Services' (to return to staff services), 'Open Employer's Folder' (to begin working with the employer), and 'Add Locations and Contacts' (to enter multiple locations and contacts).

Staff will encounter the same screens that the employers encounter when they register to create a CalJOBS account. It is important that staff write down the employer's username and password so that they may have access later on.

Once staff have completed the registration, they will receive the **What would you like to do next?** Screen.

# Employer Case Management

# Assist an Employer

Quick Search

Welcome to My Staff Workspace Rianna Rose.  
This page allows you to customize the content you are interested in. Click on a button from the menu on the left hand side of the screen.

My Staff Dashboard | My Staff Resources | My Staff Account | Directory of Services

Currently Managing

A NEW EMPLOYER

Johnson, Serenity

Release Employer

Assist a new Employer

Services for Workforce Staff

Manage Individuals

**Manage Employers**

Manage Résumés

Manage Job Orders

Manage Labor Exchange

Manage Activities

Saved Lists

Individuals Assisted: [Test, Fresno \(FRESNOTEST\)](#), [Test, Johnny \(TESTINGUATIA\)](#), [Olive, Ellie \(ELIEOLIVE\)](#), [Blue Tang, Dory \(BLUEDORY\)](#), [Landscape, Johnny \(GREENTHUMB1\)](#)

Employers Assisted: [Bounce House \(BOUNCEHOUSE\)](#), [Awesome Kid's Clothes \(KIDSCLOTHES1\)](#), [Great Agriculture \(AGRICULTURE101\)](#), [Baker 23 \(Baker2323\)](#), [Icecream on the Beach \(NEWMANAGER\)](#)

Create an Employer

**Assist an Employer**

Individuals	Create Date
Individuals	3/22/2017
MIOA	3/23/2017

Page 1 Of 1

Staff Productivity

Staff Productivity by Program  
6/5 to 7/5

Program	Count
GEN	1
Trade	1
WP	5
WIOA	1

Staff can also assist an employer who is already registered. Sometimes, staff may want to work on the employer's behalf to post a job order, manage jobs, or search for résumés. To assist an employer, under **Services for Workforce Staff**, hover over **Manage Employers**, and select **Assist an Employer**.

## Assist an Employer

The screenshot displays a web interface titled "Assist an Employer". It is divided into two main sections: "Quick Assist" and "Employer Criteria".

**Quick Assist:** This section indicates that the user has 2 saved Employer items in their "My Search Lists". Below this, there is a dropdown menu showing "Bounce House (BOUNCEHOUSE)" and an "Assist" button. A note states, "Here are the 10 most recent employers you assisted:". A "Search" button is located to the right of this section.

**Employer Criteria:** This section allows for filtering search results. It includes the following fields and options:

- Show User Accounts:** Three radio button options:
  - Primary User Account Only
  - Include all contacts with logins
  - Include all contacts with and without logins
- Employer Name:** A text input field.
- Employer User Name:** A text input field.
- Employer User ID:** A text input field.
- Employer Size:** A dropdown menu with "None Selected" selected.
- Employer Type:** A dropdown menu with "None Selected" selected.

A link labeled "Show Keyword Search Options" is positioned between the "Employer Name" and "Employer User Name" fields. A small page number "11" is visible in the bottom right corner of the interface.

Staff will be directed to a search criteria page with multiple ways to search for an employer. Staff can use the information they have regarding the employer to find them in the system, such as: Employer Name, Company Address, or Employer User Name.

In addition, if the employer is one that staff have recently assisted, they may be found in the **Quick Assist** area in the recent employers assisted.

Select the "Search" button to search for the employer.

# Assist an Employer

Results View: [Summary](#) | [Detailed](#)  
To sort on any column, click a column title.

Username	Account Type	Employer	Employer Site ID	Primary Contact Login	City	Active Contacts	Created	Access	Action	Select
<a href="#">NEWEMPLOYER14</a>	Recruiting	Poppy's Bindal	6027	Yes	Sacramento	<b>Poppy Dress (P)</b>	7/18/2017	Pending Verification	<a href="#">General</a> <a href="#">Contacts</a> <a href="#">Activities</a> <a href="#">Job Orders</a> <a href="#">Notes</a>	<input type="checkbox"/>

Save List  
Update Existing List

Page 1 of 1

Rows 50

Select the employer from the results list by clicking on their Username, or accessing a specific section of their profile from the **Action** column.

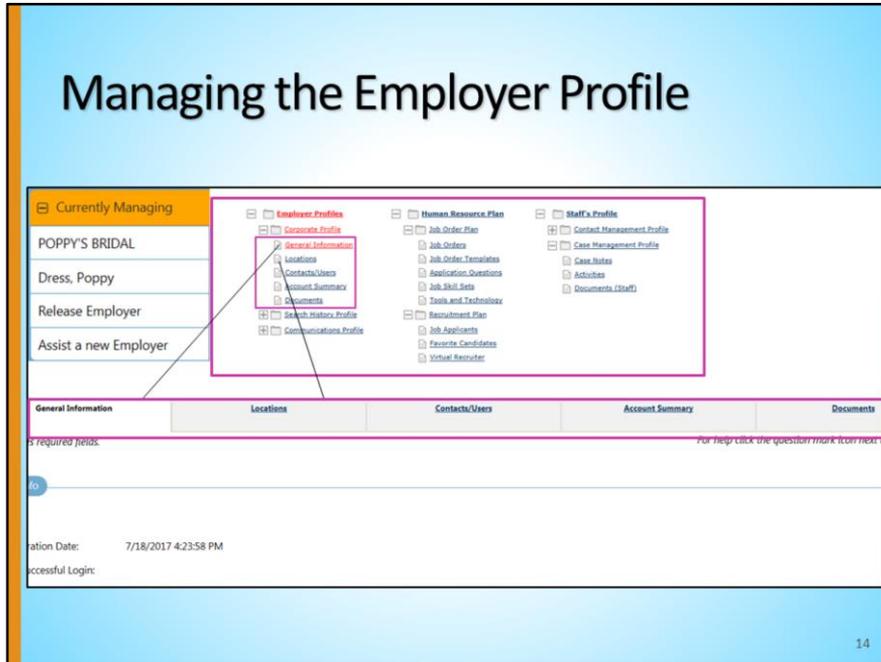
# Managing an Employer

The screenshot displays the CalJOBS interface for managing an employer. The left sidebar contains a 'Quick Search' bar and a 'Currently Managing' menu item, which is highlighted with a pink arrow. Below this menu, the name 'POPPY'S BRIDAL' is listed, along with options to 'Dress, Poppy', 'Release Employer', and 'Assist a new Employer'. The main content area shows a list of employer profiles under the heading '( Assist an Employer | Staff Services | Employer Portfolio )'. The profiles are organized into three columns: 'Employer Profiles', 'Human Resource Plan', and 'Staff's Profile'. The 'Employer Profiles' column includes 'Corporate Profile', 'Search History Profile', and 'Communications Profile'. The 'Human Resource Plan' column includes 'Job Order Plan', 'Job Order', 'Job Order Terminates', 'Recruitment Questions', 'Job Skill Sets', 'Tools and Technologies', and 'Recruitment Plan'. The 'Staff's Profile' column includes 'Contact Management Profile', 'Case Management Profile', 'Case Notes', 'Activities', and 'Documents (Staff)'. Below the profiles, there are four tabs: 'General Information', 'Locations', 'Contacts/Users', and 'Account Summary'. The 'General Information' tab is active, showing a 'Staff Info' section with the following details: 'Registration Date: 7/18/2017 4:23:58 PM', 'Last Successful Login:', and 'Source of Registration: Direct - Staff Entered Entry'. A note indicates that an asterisk (\*) indicates required fields. A 'For help click' link is also present.

Under the **Currently Managing** menu at the top of the left menu, staff will see the name of the employer in whose account they are currently working with.

Under the same menu of **Currently Managing**, staff should always select **Release Employer** when no longer assisting that employer.

# Managing the Employer Profile



When managing an employer, staff have the ability to view multiple aspects of the employer's profile, including their locations and contacts/users, job orders, favorite candidates, and case notes. These pieces of information can be seen highlighted on this screenshot.

In this screen shot, we are assisting an employer and looking at information within their **Employer Profiles** folder, **Corporate Profile** subfolder, and General Information link. You can see this path because it is highlighted in red writing.

In addition, note that each subfolders' contents correspond to the tabs in this screen as well.

# Employer Activity Codes

## Employer Activity Codes

The screenshot displays a web interface for managing employer activity codes. It features a navigation menu with three main categories: **Employer Profiles**, **Human Resource Plan**, and **Staff's Profile**. The **Staff's Profile** category is expanded to show subfolders: **Contact Management Profile**, **Case Management Profile**, **Case Notes**, **Activities**, and **Documents (Staff)**. A pink arrow points to the **Activities** link. Below the menu, there are three tabs: **Case Notes**, **Activities**, and **Documents (Staff)**. The **Activities** tab is active, showing a **Service Plan** link circled in pink. Below the link, a tooltip reads: "Select this option to review the services planned for and provided to this employer."

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Staff should enter employer activity codes for services they provide to the employer, similar to adding activity codes to services provided to individuals.

To add an activity for a service provided, while **Currently Managing Employer**, under the **Employer Profile**, find the **Staff's Profile** folder, **Case Management Profile** subfolder, select the Activities link.

While in the **Activities** tab, select the Service Plan link.

## Employer Activity Codes

### Employer Services

**Company Name:** Poppy's Bridal  
**Address:** 555 Wedding Rd.  
Sacramento, CA 95814

[ [Add Service](#) [Add Multiple Services](#) ]

Page  of 0

[ [Add Service](#) [Add Multiple Services](#) ]

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If applicable, here is where the existing activity codes will be listed for this employer. In our example, no services have been added.

To add a single service, select the [Add Service](#) link. To add multiple services, select the [Add Multiple Services](#) link. Here, we will add a single service.

## Employer Activity Codes

Staff Name:	lyndsey richmond	Phone:									
*Service Type:	E90 - Referred Qualified Applicants										
Scheduled Date:	<input type="text"/> <small>MM/DD/YYYY Format</small>										
Scheduled Time:	<input type="text"/> : <input type="text"/> AM										
Actual End Date:	07/18/2017 <small>MM/DD/YYYY Format</small>										
Completion Code:	Successful										
*Region:	Los Angeles County Department of Community, and Se										
*Office:	00126 LA Works										
Position:	Staff										
Contact Type:	None Selected										
Contact Method:	None Selected										
Contact Name:	None Selected										
Comments:	<input type="text"/>										
	<a href="#">Add a new Case Note</a>   <a href="#">Show Filter Criteria</a>										
Case Notes:	<table><thead><tr><th>ID</th><th>Create Date</th><th>Subject</th><th>Actions</th></tr></thead><tbody><tr><td colspan="4">No data found.</td></tr></tbody></table>			ID	Create Date	Subject	Actions	No data found.			
ID	Create Date	Subject	Actions								
No data found.											

Save Cancel

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In the next screen, enter the required fields noted by a red asterisk. If you enter a **Completion Code**, be sure to enter an **Actual End Date**, as well. Select the “Save” button when complete.

Note: Please refer to the [Activity Code WSIN 17-09](#) for definitions of employer activity codes and when to use them.

# Employer Activity Codes

## Employer Services

**Company Name:** Poppy's Bridal  
**Address:** 555 Wedding Rd.  
Sacramento, CA 95814

[ [Add Service](#) [Add Multiple Services](#) ]

Service Description	Staff Created	Scheduled Date	Actual End Date	Completion Code	Action
E90 - Referred Qualified Applicants	richmond, lyndsey		7/18/2017	1 - Successful	<a href="#">View</a> <a href="#">Delete</a>

Page 1 of 1

Rows 100

[ [Add Service](#) [Add Multiple Services](#) ]

The added service will now populate on the table.

## Employer Case Notes

The screenshot displays a web application interface for managing employer case notes. The top navigation pane is organized into three main sections: 'Employer Profiles', 'Human Resource Plan', and 'Staff's Profile'. The 'Staff's Profile' section is expanded to show a 'Case Management Profile' subfolder, which contains three items: 'Case Notes', 'Activities', and 'Documents (Staff)'. A pink arrow points to the 'Case Notes' link. Below the navigation pane, there are three tabs: 'Case Notes', 'Activities', and 'Documents (Staff)'. The main content area shows a message: 'You currently have no saved case notes'. Below this message is a button labeled 'Add New Case Note' circled in pink. There are also links for 'Show Case Note Privileges', 'Show Filter Criteria', and 'Print Selected Case Notes'. The page number '20' is visible in the bottom right corner.

Case notes are another way to track services provided to employers. To create a case note on an employers account, under the Staff's Profile folder, Case Management Profile subfolder, select the Case Notes link.

This will bring you to an area with existing case notes for this employer, if any. If there are existing case notes, you can filter them using the Show Filter Criteria link.

To add a new case note either select the Add New Case Note link or the "Add New Case Note" button.

## Employer Case Notes

**Case Note Template**

Autofill by Template: None Selected ↕

**Case Note Summary**

Case Note ID: 0

Username: NEWEMPLOYER16

User ID: 33477

Name: Poppy's Bridal

**Case Note Details**

Please check to suppress this Case Note

\* Contact Date: 7/19/2017 Today

\* LWIA/Region: Los Angeles County Department of Community, and S

\* Office Location: 00145 LA Works JS

Program: None Selected

Worksite Location: None Selected

\* Subject: Job Fair Results

Contact Type: None Selected

**\* Case Note Description:**

The employer participated at our Fall Job Fair. Poppy, the owner, reported that they were very happy with the number of qualified job seekers that attended and showed interest in her company. She received 10 applications/resumes and believes she should be able to find a sales associate from those 10.

[\[ Spell Check \]](#)

**Message Options**

Create Message From Case Note on Save

**Case Note Attachment(s)**

Listed below are the documents associated with this case note. Click the View link below to view that particular item.

**No records found**

Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. [View](#)

[Add a Document](#) | [Scan a Document](#)

Save
Cancel

If you would like to create the case note using an existing template, select the appropriate template from the **Autofill by Template** dropdown. Otherwise, create a unique case note by completing the required fields, including the **Case Note Description** area.

Note that there are fields that are not required, but may be completed for a more complete case note. For example, you may attach a document to this case note in the **Case Note Attachment(s)** section, but it is not required.

Select the “Save” button when complete.

# Employer Case Notes

App ID	Subject	Contact Date	Create Date	Staff User	LWA	Office	Program	Source / ID	Action	select
0	Job Fair Results	7/19/2017	7/19/2017	richmond, lyndsey	13	461		Case Note-0	<a href="#">Edit/Delete</a>	<input type="checkbox"/>

Page 1 of 1

Rows 50

1 Records Found

[Add New Case Note](#) [Print Selected Case Notes](#)

[View Case Note Templates](#) | [View Deleted Case Notes](#)

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The completed case note will now populate in the **Case Notes** section, with the ability to Edit/Delete (depending on privileges).

# One Case Note to Multiple Employers

Quick Search

Welcome to My Staff Workspace Rianna Rose.  
This page allows you to customize the content you are interested in. Click on a button from the menu on the left hand side of the screen.

My Staff Dashboard | My Staff Resources | My Staff Account | Directory of Services

Currently Managing

A NEW EMPLOYER

Johnson, Serenity

Release Employer

Assist a new Employer

Services for Workforce Staff

Manage Individuals

**Manage Employers**

Manage Résumés

Manage Job Orders

Manage Labor Exchange

Manage Activities

Saved Lists

Individuals Assisted: [Test, Fresno \(FRESNOTEST\)](#), [Test, Johnny \(TESTINGUATIA\)](#), [Olive, Ellie \(ELIEOLIVE\)](#), [Blue Tang, Dory \(BLUEDORY\)](#), [Landscape, Johnny \(GREENTHUMB1\)](#)

Employers Assisted: [Bounce House \(BOUNCEHOUSE\)](#), [Awesome Kid's Clothes \(KIDSCLOTHES1\)](#), [Great Agriculture \(AGRICULTURE101\)](#), [Baker 23 \(Baker2323\)](#), [Icecream on the Beach \(NEWMANAGER\)](#)

Individuals	Create Date
Individuals	3/22/2017
MCA	3/23/2017

Local Employer Sites

**One Case Note to Multiple Employers**

Staff Productivity

Staff Productivity by Program

6/5 to 7/5

Within **Services for Workforce Staff**, **Manage Employers**, staff can create a case note for multiple employers at the same time by selecting **One Case Note to Multiple Employers**. This saves staff time in cases where they assist multiple employers in the same way. For example, if 10 registered employers in CalJOBS participate in a Local Area job fair, staff can document that all in one.

# One Case Note to Multiple Employers

The screenshot shows a web form titled "One Case Note to Multiple Employers". The form is divided into two main sections: "Case Note Template" and "Case Note Details".

**Case Note Template**

Autofill by  
Template:

**Case Note Details**

Program:  
LWIA/Region: Los Angeles County Department of Community, and Se  
Office Location: 00145 LA Works JS

Please check to suppress this Case Note

\* Contact Date: 07/19/2017 (mm/dd/yyyy) Today

\* Subject: Job Fair

Contact Type: None Selected

\* Case Note Description:  
Employer attended job fair.

**Case Note Recipient(s)**

Search For Employers

Cancel

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Complete the required fields including the **Case Note Description** section. Next, select the "Search for Employers" button to choose the appropriate employers.

# One Case Note to Multiple Employers

**Quick Assist**

You have 2 saved Employer item(s) in [My Search Lists](#).

Here are the 10 most recent employers you assisted: Poppy's Bridal (NEWEMPLOYER16) Assist

**Employer Criteria**

Show User Accounts:

- Primary User Account Only
- Include all contacts with logins
- Include all contacts with and without logins

Employer Name: Poppy's Bridal

[Search](#)

Results View: [Summary](#) [Detailed](#)

To sort on any column, click a column title.

Username	Employer	Employer Site ID	Primary Contact Login	City	Active Contacts	Created	Access	Select
NEWEMPLOYER16	Poppy's Bridal	6027	Yes	Sacramento	Poppy Dress (P)	7/18/2017	Pending Verification	<input checked="" type="checkbox"/>

[Save List](#)  
[Update Existing List](#)

[Continue](#)

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Use the search criteria to search for the employer(s). If you have a saved list of the employers, you can select them from the **Quick Assist** area, [My Search Lists](#) link. Otherwise, select the [Search](#) link. From the results, mark the box in the **Select** column and then click the "Continue" button.

## One Case Note to Multiple Employers

Case Note Recipient(s)

LoginName	CompanyName	EmployerId	Action
33477	Poppy's Bridal	6027	<a href="#">Remove</a>

Page 1 of 1

Rows 50

[\[Search For Employers\]](#)

[Save](#) [Cancel](#)

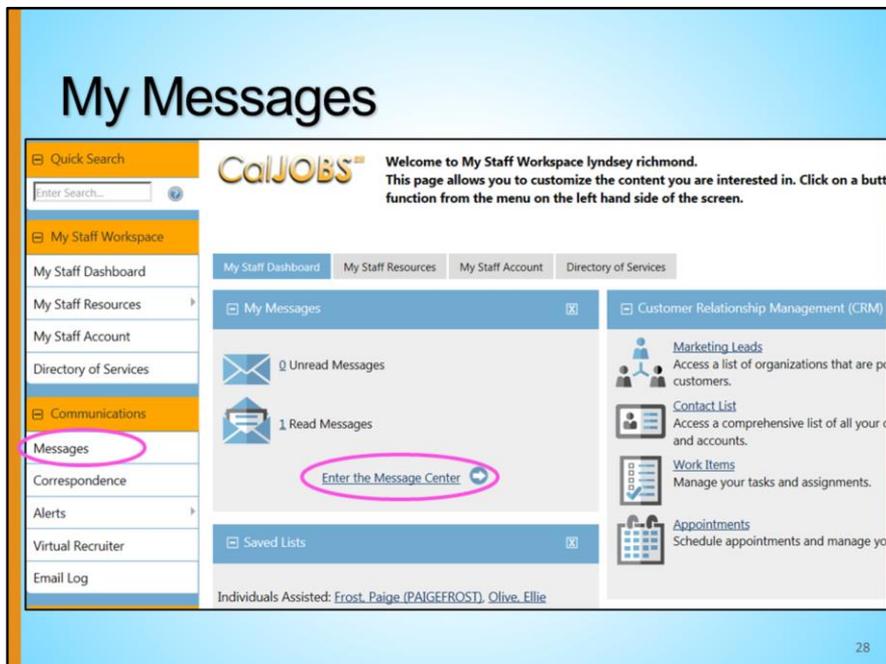
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Your chosen employer will now populate in the **Case Note Recipient(s)** table. To add additional employers, select the [Search for Employers](#) link. Once you have added all employers, select the “Save” button to finish. The case note will now be added to all of the employer’s profile.

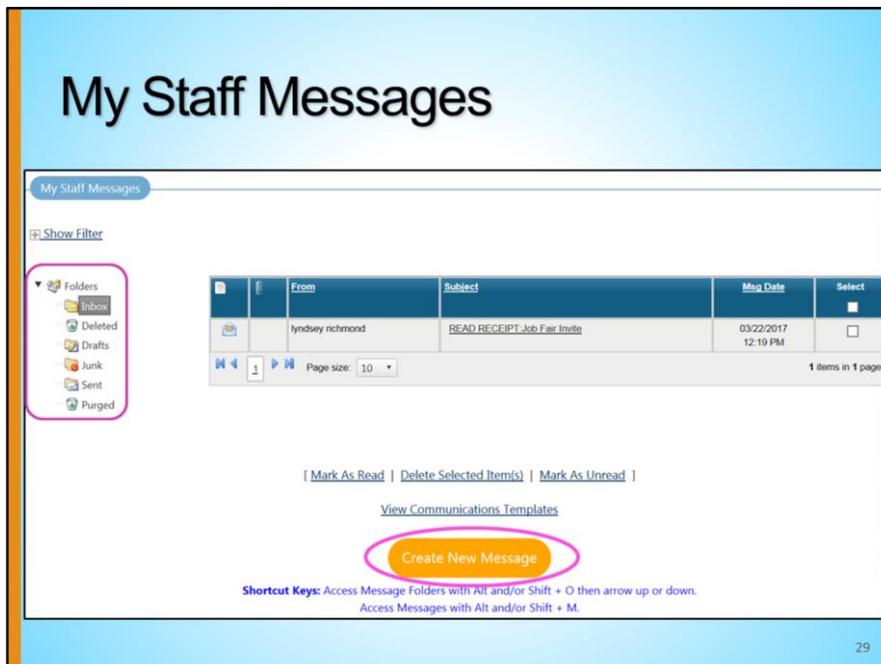
## Utilize the Message Center

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Staff can use the CalJOBS Message Center to send messages regarding topics like job fairs or possible qualified candidates to one or multiple employers.

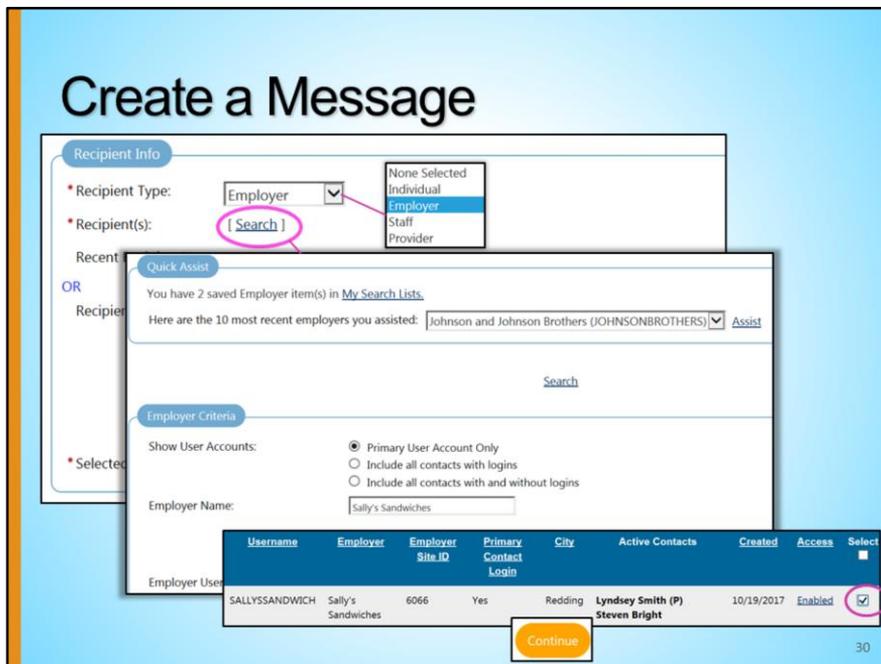


To begin, staff will navigate from the left navigation menu to **Communications** and select **Messages**; another option is to find the dashboard widget, **My Messages**, and select the [Enter the Message Center](#) link.



Once you enter the **Message Center**, an area appears with folders to manage your **Messages**. The Inbox folder will default and show any emails located in your inbox.

Select “Create New Message” to send a message.



The first section to populate is the **Recipient Info** section. Select a **Recipient Type** from the drop-down list. Notice you can select Individual, Employer, Staff, or Provider- you can correspond with these account types using the message center. Then click the [Search](#) link in the **Recipient** field to start choosing which recipients will receive this message. Note that the five most **Recent Recipient(s)** of messages you have sent are also listed. Clicking one of these names will add that user to the **Selected Recipient(s)** field.

Once you select the [Search](#) link, you will be directed to a search screen to search for the employer(s) you would like to send the message to. If you have a Search List already created that contains the employers you work with or are on your case load, you can use that Search List to add all or some of those employers. To do this, from the **Quick Assist** section, select the link, [My Search Lists](#). You will be directed to your existing search lists to select from.

If you do not have or would not like to use a Search List, use the **Employer Criteria** section to search for the desired employer. The easiest way to find the employer is to use the Employer User Name, Employer Name, or Contact First and Last Name. Then, select the [Search](#) link. Finally, select the box in the "Select" column of the employer you

would like to send the message to, and select the “Continue” button.

Please note: Do not select the employer from the “10 most recent employer” list. This will bring you to their profile instead of adding them to the message recipient section.

The image shows a web form with two main sections: "Recipient Info" and "Sender Information".

**Recipient Info**

- \* Recipient Type:
- \* Recipient(s):
- Recent Recipient(s):
 

Icecream on the Beach - Lacy Richards	+
John Johnson	+
- OR
- Recipient(s) By:
  - Login Name
  - User ID
- 
- (Comma delimited list. Limit your entry to 500 users.)
- 
- \* Selected Recipient(s):
 

Lyndsey Smith	X	↻
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**Sender Information**

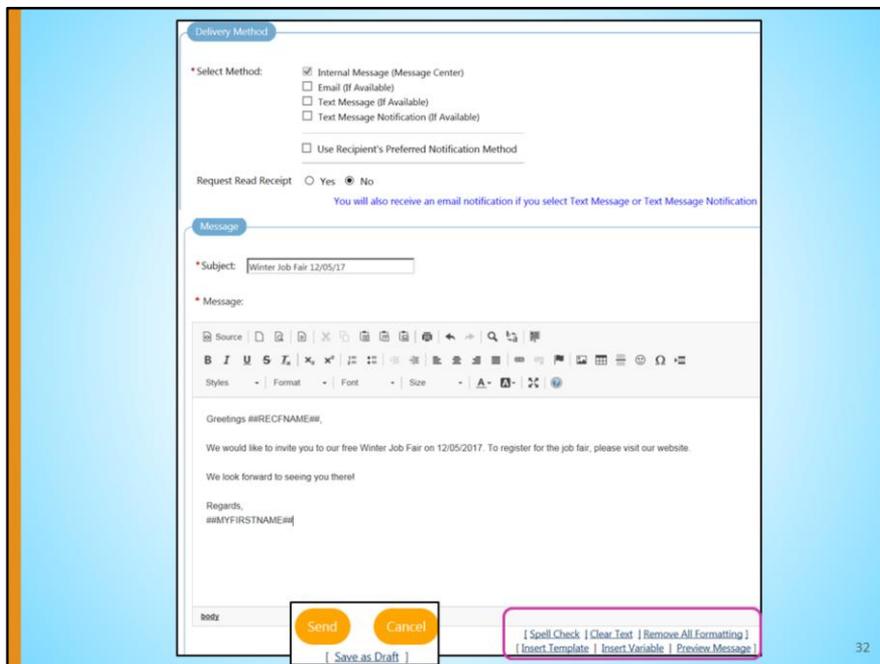
- \* From:
- \* Created by:

A pink arrow points to the "Recipient(s) By:" label, and a pink box highlights the "Selected Recipient(s)" field.

After you select the employer(s) using the Search link, the primary contact name will populate for each employer in the **Selected Recipient(s)** field. To remove the employer from the field, click on the red "X".

In addition, you can search for the employer by using the **Recipient(s) By** option. To use this, enter the employer's Login or User ID and select the Add link. If the information is correct, the primary contact name will populate for each employer in the **Selected Recipient(s)** field.

Next, the **Sender Information** section should contain your name.



Next, in the **Delivery Method** select the method for delivering the message from the available options. By default, the system will send the message through the Internal Message system, but you can also select Email, Text Message, or Text Message Notification if that information is available for your selected recipient(s). In addition, you can request a Read Receipt by selecting the “Yes” radio button.

After recipient(s) have been selected, create a **Subject** title for the message. Type the text for the message itself in the **Message** field. Click the [Insert Template](#) link to select from a list of message templates that were previously created by other staff members. If you would like to compose a message that uses insert variables (such as each recipient's first/last names, or address), click the [Insert Variable](#) link. Click the [Preview Message](#) link to see how the message will look when delivered to your chosen recipients.

Finally, if you are a staff member sending a message, the system allows you to attach a signature to messages you send through the Message Center. Click the checkbox to enable this feature, then select an Office to use to populate your message signature, if available, from the drop-down list. Messages sent to an individual's email address will automatically include your signature. Also, you can add attachments, such as a flier or

other documents, to the message before sending.

When you have finished, click the “Send” button to send your message to your selected recipients. If you do not wish to send the message now, but wish to keep it to send later, click the **Save as Draft** link.

# Reports

# Reports

☰ Reports
My Reports
Summary Reports
Detailed Reports
Custom Reports
Ad-Hoc Query Wizard
Federal Reports
Community College Reports
Live Data

- Employer Reports
- Services Reports
- Case Management Reports

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There are reports within **Reports, Detailed Reports**, that offer information on various aspects of employers in CalJOBS. We will highlight the reports in the following three categories:

- Employer Reports
- Services Reports
- Case Management Reports

# Reports

**Employer Reports**

Job Order  
Display Job Order Reports

Registered Employer  
Display Registered Employer Reports

Referrals and Referral Results  
Display Referrals and Referral Results Reports

**Employer Activity Report**

Region/LWA: NoRTEC Governing Board  
StartDate: 07/11/2017  
EndDate: 07/20/2017

Company Name	City, State, Zip	Company Create Date	Action Date	Company Contact User ID	Number of Resumes Viewed	Number of Individuals Viewed	Number of Job Orders Posted	Number of Messages Sent	Total
Icecream on the Beach	Redding, CA 96001	08/26/2016	07/17/2017	31920	5	3	2	1	11
Icecream on the Beach	Redding, CA 96001	08/26/2016	07/20/2017	31920	0	0	0	1	1
<b>Total Rows: 2</b>					<b>5</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>12</b>

The reports in the Employer Reports category include Job Order, Registered Employer, and Referrals and Referral Results. Each type of report is data on:

Job Order Reports - These reports document data from job orders created by preferred employers (employers who registered in the system) and external jobs (jobs that were spidered in from other job banks). More data can be collected from internal job orders, but some information can also be gleaned from external job orders.

Registered Employer Reports - These reports cover a large number of sub-categories for filtering to see particular breakdowns (such as by Zip code, county, or number of employees). Most of these categories deal with questions that were asked during the two-page registration form for employers. In addition, these reports document an employer's access rights, whether throughout their history with the system or currently. Lastly, these reports includes a Count of Resume Views, Individual Job Seeker Views, Open Job Orders and Summary Counts of Total Activity between specified dates.

Referrals and Referral Results- These reports list job referrals by region, office, referring staff member, and referral type.

The example on this screen is an Employer Activity report, which can be found within the Registered Employer Reports. The results identify the activity of employers within

the 10-day time frame, in the designated LWIA/Region.

# Reports

## Services Reports

### Services Provided Employer

Display Service Provided Employer Reports

### Services Provided Individuals

Display Services Provided Individuals Reports

#### Services Provided Employer Reports - List

Region: LWIA Los Angeles County Department of Community and Se  
 Staff reported: lyndsey richmond [31890.31896]  
 Create Date: 07/11/2017 - 07/20/2017

Emp. ID	Company Name	Industry	Contact	Location	Service Code	Staff Reported	Create Date	Actual Date	Schedule Date	Last Edit Date
5798	<a href="#">Icecream on the Beach</a>	445299 - All Other Specialty Food Stores		Redding, CA US	E21 - Job Fairs	Lyndsey Richmond	07/20/2017	07/18/2017		
5798	<a href="#">Icecream on the Beach</a>	445299 - All Other Specialty Food Stores		Redding, CA US	E90 - Referred Qualified Applicants	Lyndsey Richmond	07/20/2017	07/20/2017	07/20/2017	
5798	<a href="#">Icecream on the Beach</a>	445299 - All Other Specialty Food Stores		Redding, CA US	E21 - Job Fairs	Lyndsey Richmond	07/20/2017	07/20/2017	07/20/2017	
6027	<a href="#">Posey's Rental</a>	448190 - Other Clothing Stores		Sacramento, CA US	E90 - Referred Qualified Applicants	Lyndsey Richmond	07/18/2017	07/18/2017		

Total Rows: 4

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Within the **Services Reports** category, are the Services Provided Employer reports. These reports provide information about the services provided to employers by system staff. Staff can run these reports in a few ways, including by Employer or by Staff, to produce results of activity codes entered for employers.

The example on this screen is a List report within Services Provided Employer reports. It provides a list of all employer activity codes entered by the specific staff member, within the week date range, in the designated LWIA/Region.

# Reports

## Case Management Reports

[Case Load](#)

Display Case Load Reports

[Case Load - Non-WIOA](#)

Display Case Load - Non-WIOA R

[Case Load - WIOA](#)

Display Case Load - WIOA Reports

[Documentation](#)

Display Documentation Reports

### Case Notes:

Advanced

- [Employer](#)
- [Provider](#)
- [Individual](#)

### Case Management Report - Case Notes - Employer Case Notes Report

Region/LWIA: Los Angeles County Department of Community, and Se  
Created by Staff  
Employer: Icecream on the Beach - Redding, CA / Lacy Richards  
Date Range: 06/21/2017 - 07/20/2017

Emp ID	Company Name	Created By	Create Date	Last Edited By	Edit Date	Case Subject	Case Notes
5798	<a href="#">Icecream on the Beach</a>	Richmond, Lyndsey	7/20/2017	Richmond, Lyndsey	07/20/2017	Referred Qualified Candidates	Referred multiple qualified candidates.
5798	<a href="#">Icecream on the Beach</a>	Richmond, Lyndsey	7/20/2017	Richmond, Lyndsey	07/20/2017	Job Fair Assistance	Assisted with job fair.

Total Rows: 2

Within the Case Management Reports section, staff can utilize the Documentation reports to run case note reports. This report can be used, for example, if staff are entering case notes for an employer and need a list of all case notes they have completed.

The example on this screen is a result of a Case Notes, Employer report. The results identify case notes created by staff for the specific employer (Icecream on the Beach), within the week date range, in the designated LWIA/Region.

# Questions



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For any questions concerning this module, please contact the CalJOBS Education and Development Unit at [CalJOBSTrainingTeam@edd.ca.gov](mailto:CalJOBSTrainingTeam@edd.ca.gov).

This concludes the training module – Employer Services Part II