

# CalJOBS<sup>SM</sup> Case Management

## Participation and Activities



Welcome to CalJOBS Case Management: Participation and Activities.

## Objectives

- Create Participation
- Create and Close Activities

This module will explain the following:

- Creating Participation- Once eligibility is established through the application, create participation to enroll the individual into the program.
- Creating and closing Activities- Create activities to track services provided to the individual, and then close them when you are done providing a services. You really want to track all services provided to these individuals.

Creating Participation,  
Activity Codes,  
and Case Notes

# Assisting an Individual

Menu Home My Dashboard Sign Out Services for Individuals Services for Employers

Quick Search Enter Search...

My Staff Workspace

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

Saved Lists

Individuals Assisted: [Joplin, Janis \(PEARL2017\)](#), [LaTroll, Poppy \(PINKFLOWER\)](#), [Wayne, Bruce \(BRUCE WAYNE89\)](#), [Richmond, Lyndsey \(RICHMONDL16\)](#)

Employers Assisted: [Santa's Toy Shop \(SANTAHELPER\)](#), [CalSTRS \(C8032926\)](#), [CALIFORNIA \(SU1\)](#)

My Calendar

January 2017

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

0 New Appointments  
31 Upcoming Events

Enter the Appointment Center

Services for Workforce Staff

Manage Individuals

Manage Employers

Manage Resumés

Manage Job Orders

Create an Individual

One Case Note to Multiple Individuals

Assist an Individual

After logging into the system, the first page you will see is **My Staff Dashboard**. On the left navigation menu you will see a gold tab called **Services for Workforce Staff**. In that tab, hover over **Manage Individuals** and select **Assist an Individual** from the flyout menu, as shown in the lower circle.

Or, if you have previously assisted individuals, you can choose from the recently assisted list of individuals in the **Saved Lists** widget, shown in the top circle.

# Assisting an Individual

The screenshot displays a software interface for assisting an individual. At the top, there is a navigation bar with "[ General | Office ]" and a magnifying glass icon. Below this, the "Quick Assist" section shows a list of recent individuals: Joplin, Janis (PEARL2017), LaTroll, Poppy (PINKFLOWER), Wayne, Bruce (BRUCE\_WAYNE89), and Richmond, Lyndsey (RICHMONDL16). A pink circle highlights the "Wayne, Bruce (BRUCE\_WAYNE89)" entry, and a pink arrow points from this entry to the "Quick Search" panel on the right. The "General Criteria" section contains several input fields: Individual Username, Individual User ID, StateID Number, First Name, Last Name, SSN (last 4 digits), SSN (full number), State Source ID, State Activity ID, and Date of Birth. A pink box highlights the "First Name", "Last Name", and "SSN (last 4 digits)" fields. The "Quick Search" panel on the right shows search results for "wayne,bruce", listing two entries for "WAYNE, BRUCE" with their respective usernames, user IDs, SSNs, state IDs, and locations.

There are different search options including **Quick Assist** and **General Criteria**. Also, there is a **Quick Search** at the top right corner of every page.

It is recommended to search by full name and the last 4 digits of the individual's Social Security Number. This will help eliminate the likelihood of opening the wrong person's profile.

# Selecting an Individual

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

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	RTW	Last Exited	Created	Action	Select
<a href="#">BRUCE WAYNE89</a>	Bruce	Wayne	9666		1001008370	02/09/2015	N		02/09/2015	<a href="#">Summary Tab</a> <a href="#">Notes Tab</a> <a href="#">Activities Tab</a> <a href="#">Programs Tab</a>	<input type="checkbox"/>
 <a href="#">SBE VETERAN</a>											
<a href="#">BWAYNE6300</a>	Bruce	Wayne	6300		1001474286	04/27/2016	N		02/02/2016	<a href="#">Summary Tab</a> <a href="#">Notes Tab</a> <a href="#">Activities Tab</a> <a href="#">Programs Tab</a>	<input type="checkbox"/>

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

2 Records found

Still, your search results may give you more than one individual user. Find the individual you would like to create a WIOA application for, and select the “[Programs Tab](#)” link in the far right Action column.

# Verifying Right to Work Documents

**Right to Work Verification**

Documentation to Right to Work must be provided to assist this individual. Please complete the following information.

Individual: Tracy Tone

Current Citizenship:

USCIS (Alien Registration) Number:

USCIS (Alien Registration) Expiration Date:  [Today](#)

[Save](#) [Cancel](#) [Remind me later](#)

Next, you may see a **Right to Work Verification** screen. Staff can enter the information, or bypass by selecting the Remind me later link at the bottom of the page.



# Create Participation

Title I - Workforce Development
Apps: 1

☰
WIOA #2238703 - Complete

LWIA:	99 - WIOA Statewide Grant Contractor	Application Date:	02/21/2017
Onestop:	2163 - (Training) Generic Statewide Contractor Office	Participation Date:	N/A
Open/Total Activities:	0 / 0	Closure Date:	N/A
		Exit Date:	N/A

**Case Information**

ABC Eligibility Date: N/A	Adult Eligibility Date: 02/21/2017
Dislocated Worker Eligibility Date: N/A	Youth Eligibility Date: N/A
Incumbent Worker Eligibility Date: N/A	

**Location and Staff**

LWIA: 99 - WIOA Statewide Grant Contractor	Onestop: 2163 - (Training) Generic Statewide Contractor Office
Create Staff Username: 31829	Edit Staff Username: 31829
Case Manager: N/A	Temporary Case Manager: N/A

☰ Eligibility Summary

☰ Participation N/A

[Create Participation](#) ←

This is what your screen will look like after expanding. Notice a number of light gray “ribbons” that are now present within the application. Select anywhere in the second down, light gray ribbon titled **Participation** (highlighted in pink) to expand the Participation section. Next, select the Create Participation link.

**Note:** If you do not create Participation for an individual, they will not be enrolled in the program. Creating an application only establishes that they are eligible for the program, but does not enroll.

The image shows a screenshot of a web application interface. At the top, there is a blue header bar with the text 'General Information' in white. Below this, a white rectangular box contains a list of fields and their corresponding values. The fields are: 'Staff User Add:' with value '31829', 'State ID:' with value '31806', 'Name:' with value 'Brody Bridges', 'Application Date:' with value '02/21/2017', and 'Earliest Eligibility Date:' with value '02/21/2017'. The background of the entire page is light blue.

<b>Staff User Add:</b>	31829
<b>State ID:</b>	31806
<b>Name:</b>	Brody Bridges
<b>Application Date:</b>	02/21/2017
<b>Earliest Eligibility Date:</b>	02/21/2017

At the top of this page there will be **General Information** regarding this individual and the application.

Under **Participant Information**, the first item to be entered is the “Participation Date”. This should be the date staff provide the first service to the individual. It cannot be before the Eligibility Date and it cannot be a future date. The rest of the information is auto-filled from the Individual Profile. Verify for accuracy.

Select the “Next” button to continue.

**Note:** CalJOBS allows you to document data elements, per your local organization business rules, via the “Verify” links. If you choose to use a Verify link, please be sure to have the document in the physical case file or uploaded to CalJOBS. If you do not choose to verify an item, the system will default to “Documentation in Case File” for that data element. Module 1, **Title I Application**, covers verify links in more detail.

General Information	Service Provider
<b>General Information</b>	
Participant User Name:	BRODYBRIDGES
Participant State ID:	31806
Last Name, First Name MI:	Bridges, Brody
Social Security Number:	6868
Address:	555 Sunshine Ln Redding, CA 96001
Application Summary:	Program:WIOA Application Date:2/21/2017 Earliest Eligibility Date:02/21/2017
Participation Date:	02/21/2017
Customer Program Group:	10B - Adult - Individualized Services/Training
LWIA Region:	Your Local Area/Region
Office Location:	Your Organization Office
Agency Code Search:	<a href="#">Click Here</a>

After selecting “Next”, are now on the Activity Enrollment- General Information page. This is because creating Participation includes creating the first activity code for an individual.

We see several tabs at the top of this page. We begin with the **General Information** tab and ensure that the **Customer Program Group** is the appropriate category. Since this person was eligible to receive services for the Adult program, the 10B- Adult Customer Program Group is chosen. If this individual was eligible to receive services from multiple programs, as defined in the Title I application, those options would populate here.

Be sure to select your LWIA Region and the Office location if it is not auto-filled.

The screenshot shows a web form with two tabs: 'General Information' (highlighted with a pink box) and 'Service Provider'. Under 'General Information', there is a sub-section 'Enrollment Information'. The form contains the following fields:

- Grant:** A dropdown menu with 'None Selected' selected.
- WIOA Title II Partner Program:** A checkbox labeled 'Yes, service is a WIOA Title II Partner Program.' which is unchecked.
- \* Activity Code:** A text input field containing '101 Orientation'. Below it is a blue link that says '[ Select Activity Code ]'. A pink circle highlights the 'Activity Code' label, and a pink arrow points to the link.
- Projected Begin Date:** A date input field with a calendar icon and the text 'Today'.
- Actual Begin Date:** A date input field containing '02/09/2016'. Below it is a note: 'Actual begin date may not be modified on the first activity.' A pink arrow points to the date field.
- \* Projected End Date:** A date input field containing '02/10/2016' with a calendar icon and the text 'Today'.
- Any classes attended through Distance Learning:** Radio buttons for 'Yes' and 'No', with 'No' selected.

Still within the **General Information** tab, we are now under **Enrollment Information**. If you are serving your individual with a WIOA special grant, select the grant from the **Grant** dropdown. In our example, our individual is not receiving services from a WIOA grant, therefore we are keeping this field as “Non Selected”.

To select an Activity Code, use the link titled “Select Activity Code.” This will generate a pop-up box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the **Activity Code** box. For training purposes today, we chose “101 Orientation.”

Next, your **Actual Begin Date** will auto-populate. Creating Participation is the only instance where your **Actual Begin Date** will auto-populate. When creating subsequent activities, you must manually enter an actual begin date.

Projected end date is when you believe the activity will be completed. Enter a date in the **Projected End Date** box.

Staff Information

Staff ID: 30532206

Position:

Current Case Manager: [Case currently Not Assigned to a Case Manager](#)  
[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

Previous Case Manager:

Comments:

Case Notes: [Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

[Next >>](#)

[Exit Wizard](#)

Finally, **Staff Information** is where you can assign a case manager, enter a comment, or create a case note. Be sure to select “Next” to save information and move on.

Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information
<p><b>Enrollment Service Provider Information</b></p> <p><b>Enrollment Summary:</b> Enrollment ID: 2796670            Username: BRODYBRIDGES            WIOA Application ID: 2238703            Activity Code: 101            Activity Dates: 2/21/2017 - 2/21/2017</p> <p>* <b>Provider:</b> <input type="text" value="Local Provider"/>  <a href="#">[ Select Provider ]</a></p> <p>* <b>Service, Course or Contract:</b> <input type="text" value="Local Program"/>  <a href="#">[ Select Service, Course or Contract ]</a></p> <p><b>Provider Locations:</b> <input type="text"/>  <input type="text"/>  <a href="#">[ Select Provider Locations ]</a></p> <p><b>Provider Contacts:</b> <input type="text"/>  <a href="#">[ Select Provider Contacts ]</a></p> <p>* <b>Occupational Training Code:</b> Not Applicable</p> <p style="text-align: right;"> <input style="background-color: #FFD700;" type="button" value=" &lt;&lt; Back "/> <input style="background-color: #FFD700; border: 2px solid #FF00FF;" type="button" value=" Next &gt;&gt; "/> </p>					

Now that we've completed the fields within the **General Information** tab, you will be brought to the **Service Provider** tab. For all activity codes, you will complete this tab.

For services that your office or organization provide, you will select yourself as the local provider of that service. To select the provider, click the "Select Provider" link. Then, select the appropriate provider name from the pop-up box. Next, click the "Select Service, Course or Contract" link and choose the appropriate Service, Course or Contract name of that service being provided.

Select the "Next" button to continue.

The screenshot shows a web application interface with a light blue header and a white main content area. At the top, there are four navigation tabs: 'Financial Aid', 'Enrollment Budget', 'Budget Planning', and 'Closure Information'. The 'Closure Information' tab is highlighted with a pink border. Below the tabs, there is a 'Closure Information' section with a blue header. The main content area contains an 'Enrollment Summary' section with the following information: Enrollment ID: 2796670, Username: BRODYBRIDGES, WIOA Application ID: 2238703, Activity Code: 101, and Activity Dates: 2/21/2017 - 2/21/2017. Below this, there are three input fields: 'Last Activity Date' with a 'Today' button, 'Completion Code' with a dropdown menu showing 'None Selected', and 'Case Notes' with a table for adding notes. The table has columns for 'ID', 'Create Date', 'Subject', and 'Action', and the message 'No data found.' is displayed below it. At the bottom right of the page, there are three buttons: '<< Back', 'Finish', and 'Delete'. The 'Finish' button is highlighted with a pink circle.

Depending on the activity code you are entering, you may skip some of the enrollment tabs and be directed straight to the **Closure Information** tab. If you do not wish to close the activity at this time do not enter **Last Activity Date** or **Completion Code**; instead select **Finish**.

If you do wish to close the activity, enter a **Last Activity Date** and then choose the **Completion Code** from the drop down menu. Then, select “Finish”.

**Reminder:** The first service activity code entered begins an individual’s participation in the program.

Participation
02/21/2017

[Edit Participation](#)

**Participation Date:** 02/21/2017

**School Status:** Not attending school: Secondary School Graduate or has a recognized equivalent      **Employment Status:** Not Employed

Activities / Enrollments / Services
1

[Create Activity / Service / Enrollment](#)

Search:

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
📄	<a href="#">101 - Orientation</a> Local Provider	📄	Adult	N/A	02/21/2017	02/21/2017	<a href="#">02/21/2017</a> Successful Completion

Page: 
Rows:

After selecting “Finish”, you will see information on the **Participation** ribbon within the Title I Application, along with the “[Edit Participation](#)” link.

In addition, the **Activities/Enrollments/Services** ribbon now has an activity table with the first service provided to this individual.

# Creating Subsequent Activities

Activities / Enrollments / Services 1

[Create Activity / Service / Enrollment](#)

Search:

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	101 - Orientation Local Provider		Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

Page: 1 of 1 Rows: 10

To enter another activity code, choose the “Create Activity/ Service/ Enrollment” link on the **Activities/Enrollments/Services** ribbon.

General Information	Service Provider
<b>General Information</b>	
Participant User Name:	BRODYBRIDGES
Participant State ID:	31806
Last Name, First Name MI:	Bridges, Brody
Social Security Number:	6868
Address:	555 Sunshine Ln Redding, CA 96001
Application Summary:	Program:WIOA Application Date:2/21/2017 Earliest Eligibility Date:02/21/2017
Participation Date:	02/21/2017
Customer Program Group:	10B - Adult - Individualized Services/Training
LWIA Region:	Your Local Area/Region
Office Location:	Your Organization Office
Agency Code Search:	<a href="#">Click Here</a>
Agency Code:	

After selecting the “[Create Activity/ Service/ Enrollment](#)” link you are brought to the first tab- **General Information**.

Be sure to choose the correct **Customer Program Group**, based on your grant/funding stream. The **LWIA Region** will be your LWIA Region. **Office Location** will be your office/agency name.

If your Area uses Agency Codes, the code can be entered by selecting the [Click Here](#) link.

General Information | Service Provider

Enrollment Information

Grant: None Selected

WIOA Title II Partner Program:  Yes, service is a WIOA Title II Partner Program.

\* Activity Code: 328 Occupational Skills Training - Non Approv Provider (No 1) [Select Activity Code](#)

Projected Begin Date:  Today

Actual Begin Date: 02/23/2017 Today

\* Projected End Date: 06/15/2017 Today

Any classes attended through Distance Learning:  Yes  No

Participant has been issued an ITA and the ITA will pay for this service: None Selected

Still within the **General Information** tab, scroll down to **Enrollment Information**.

To select an **Activity Code**, use the link titled “[Select Activity Code](#).” This will generate a pop-up box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the Activity Code box. For training purposes today, we chose “328 Occupational Skills Training.” You will enter whichever activity code is appropriate for the services you provide.

Next, enter an **Actual Begin Date**. You may choose the “[Today](#)” link to populate today’s date, click on the picture of a calendar to populate a calendar for which to choose the date, or manually enter the date into the box.

**Note:** If you choose to use a **Projected Begin Date**, you must remember to go back into the system and add an **Actual Begin Date** when the activity begins. It is always preferred to use Actual Begin Dates.

Finally, enter the **Projected End Date**.

The screenshot shows a web application interface with a light blue background. At the top, there are two tabs: 'General Information' (highlighted with a pink box) and 'Service Provider'. Below the tabs is a 'Staff Information' section. It contains the following elements:

- Staff ID:** 30532206
- Position:** A dropdown menu currently showing 'Staff'.
- Current Case Manager:** A text field with the message 'Case currently Not Assigned to a Case Manager' and three links: 'Assign Case Manager', 'Assign Me', and 'Remove Case Manager Assignment'.
- Previous Case Manager:** A text field.
- Comments:** A large empty text area.
- Case Notes:** A section with links for 'Add a new Case Note' and 'Show Filter Criteria', followed by a table with columns 'ID', 'Create Date', 'Subject', and 'Action'. Below the table, it says 'No data found.'
- Next >>:** A yellow button with a pink circle around it, located in the bottom right corner of the main content area.
- Exit Wizard:** A small link in the bottom left corner.

Finally, **Staff Information** is where you can assign a case manager, enter a comment, or create a case note. Be sure to select “Next” to save information and move on.

The screenshot shows a web interface with two tabs: 'General Information' and 'Service Provider'. The 'Service Provider' tab is active. Below the tabs is a section titled 'Enrollment Service Provider Information'. It contains the following fields and data:

- Enrollment Summary:** Enrollment ID: 2796674, Username: BRODYBRIDGES, WIOA Application ID: 2238703, Activity Code: 328, Activity Dates: 2/23/2017 - 8/8/2017
- Provider:** GSI Technical Career Institute (with a link to 'Select Provider')
- Service, Course or Contract:** Culinary Arts/Chef Training (with a link to 'Select Service, Course or Contract')
- Provider Locations:** GSI Technical Career Institute, 3597 Cullington Rd, Sacramento, CA 94204 (with a link to 'Select Provider Locations')
- Provider Contacts:** Larry White (with a link to 'Select Provider Contacts')
- Occupational Training Code:** 35101100 - Chefs and Head Cooks (with a link to 'Occupational Training Code')

At the bottom right, there are two orange buttons: '<< Back' and 'Next >>'. The 'Next >>' button is circled in pink.

Next, on the **Service Provider** tab, you must complete the **Enrollment Service Provider Information**. If you are completing a training activity code, such as in our example, you must select the provider who will provide the training by selecting the “Select Provider” link. This will generate a pop-up box with list of providers to choose from. Select the appropriate provider name, and your choice will fill in the **Provider** box.

Then select the link, “Select Service, Course or Contract”. Again, this will generate a pop-up box with a list of Service, Course or Contract associated with that Provider. Select the appropriate Service, Course or Contract Name and your choice will fill in the appropriate box.

The **Provider Locations** and **Provider Contacts** will auto-populate.

Finally, the **Occupational Training Code** may auto-populate. If it doesn't select the “Occupational Training Code” link to choose the appropriate Occupational Training code.

Once all fields are complete, select “Next”.

The screenshot shows a software interface with a top navigation bar containing five tabs: 'Enrollment Cost', 'Financial Aid', 'Enrollment Budget', 'Budget Planning', and 'Closure Information'. The 'Closure Information' tab is selected and highlighted with a pink border. Below the tabs, the 'Closure Information' section is displayed. It includes an 'Enrollment Summary' with the following details: Enrollment ID: 2796670, Username: BRODYBRIDGES, WIOA Application ID: 2238703, Activity Code: 101, and Activity Dates: 2/21/2017 - 2/21/2017. There are also input fields for 'Last Activity Date' (with a 'Today' button), 'Completion Code' (a dropdown menu showing 'None Selected'), and 'Case Notes' (with a link 'Add a new Case Note' circled in pink). Below the 'Case Notes' section is a table with columns 'ID', 'Create Date', 'Subject', and 'Action', and a message 'No data found.' At the bottom right of the interface, there are three buttons: '<< Back', 'Finish' (circled in pink), and 'Delete'.

If you are creating a training activity code, you will be brought to the **Enrollment Cost** tab after selecting “Next” on the previous slide. For our training purposes we will not review the **Enrollment Cost**, **Financial Aid**, **Enrollment Budget**, or **Budget Planning** tabs.

We will resume our training on the **Closure Information** tab. If you wish, select the “Add a New Case Note” link and enter information about the completion of this activity. If you do not want to create a new case note associated with this activity, and you do not wish to close the activity at this time do not enter **Last Activity Date** or **Completion Code**. Instead select “Finish”.

If you do wish to close the activity, enter a **Last Activity Date** and then choose the **Completion Code** from the drop down menu. Then, select “Finish”.

To create a case note, select the “Add a new Case Note” link.

# Creating a Case Note

**Case Note Template**

Autofill by Template: None Selected

**Case Note Summary**

Case Note ID: 0  
 Username: BRODYBRIDGES  
 User ID: 32800  
 Name: Brody Bridges

**Case Note Details**

Please check to suppress this Case Note

\* Contact Date:   [Today](#)

Type ID: 2760672 Delete

\* LWIA/Region: None Selected

\* Office Location: None Selected

\* Program: Title I - Workforce Development

App ID: 2238703 - Active

Partner Program: None Selected

\* Subject:  

Contact Type: None Selected

\* Case Note Description:

[\[ Spell Check \]](#)

To add a Case Note, simply complete the required fields on this page. You may choose a **Case Note Template** (if you see one that meets your needs) by selecting the drop down menu at the top of the page. Otherwise, continue to the next fields.

The **Case Note Summary** information auto-fills.

The **Case Note Details** section must be completed. Enter the **Contact Date** and whether or not you want to suppress the Case Note. A suppressed Case Note means that the note will not be visible to others, just you.

Choose the **LWIA/Region** as WIOA Statewide Contractor, your organization name under **Office Location**, and WIOA **Program** from the dropdown menu , if not already displayed.

The **App ID** should be auto-filled.

Type in the **Subject** of this Case Note, choose the **Contact Type**, and type a brief note in the **Case Note Description**.

Note: It may be very beneficial for you to use a consistent naming convention for the subject of your case notes. For example, writing the number of the activity code the case note corresponds to (in our example, 328). This will be very helpful when running a case note report.

# Case Note

The screenshot shows a web form titled "Case Note" with a light blue background. The form is divided into three main sections: "Message Options", "Delivery Method", and "Case Note Attachment(s)".

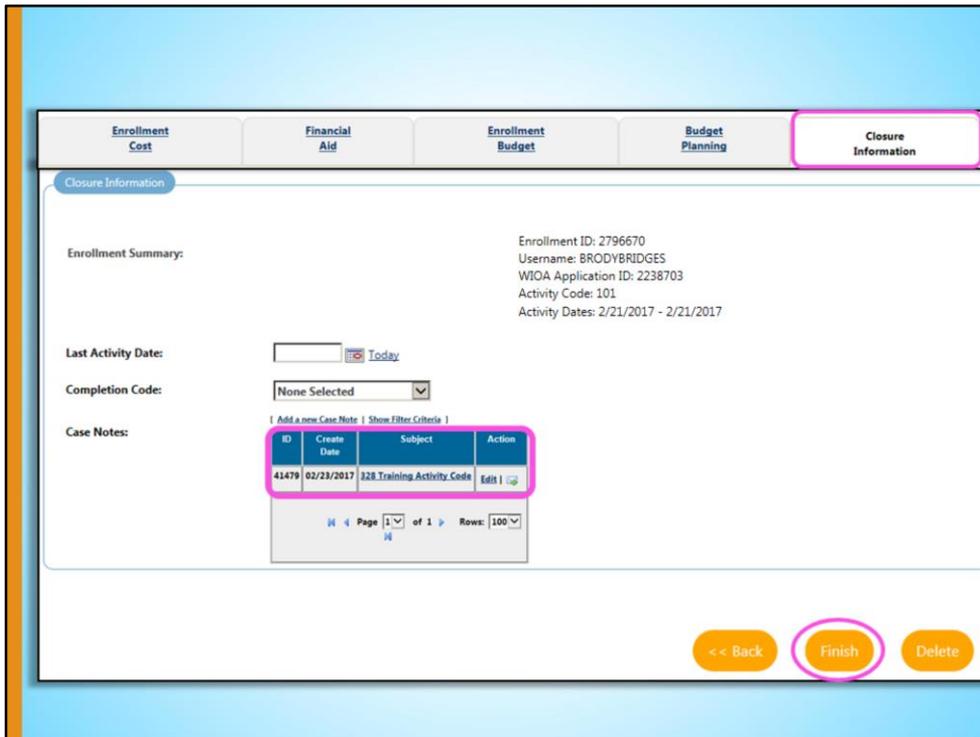
- Message Options:** A checkbox labeled "Create Message From Case Note on Save" is checked.
- Delivery Method:** A section titled "Delivery Method" with a sub-label "\*Select Method:". It contains five checkboxes: "Internal Message (Message Center)" (checked), "Email (If Available)", "Text Message (If Available)", "Text Message Notification (If Available)", and "Use Recipient's Preferred Notification Method" (unchecked).
- Request Read Receipt:** Radio buttons for "Yes" and "No", with "No" selected.
- Case Note Attachment(s):** A section titled "Case Note Attachment(s)" with a sub-label "Listed below are the documents associated with this case note. Click the View link below to view that particular item." Below this is a grey box containing the text "No records found".

At the bottom of the form, there are two buttons: "Save" (highlighted with a pink circle) and "Cancel".

You may choose to create a message from this case note by marking the **Create Message from Case Note on Save** checkbox. To demonstrate this, we have selected the box as an example. If you do not wish to create a message from this Case Note, do not check the box.

The system will allow you to scan or upload a document to be associated with this note if you need to do so. This may be done by selecting either the "Add a Document" or "Scan a Document" link.

When the Note is complete, select the "Save" button.



Note the added Case Note in the **Case Notes** table.

To finish adding this activity, select the “Finish” button.

Activities / Enrollments / Services 2

Create Activity / Service / Enrollment

Search

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
<span style="color: green;">O</span>	328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute	<span style="color: purple;">W</span>	Adult	N/A	02/23/2017	08/08/2017	Close
<span style="color: yellow;">C</span>	101 - Orientation Local Provider	<span style="color: purple;">W</span>	Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

Page 1 of 1

Rows 10

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Measurable Skills Gain 0

Activity Status: O = Open, C = Closed, S = System Closed, V = Voided

You will find the added activity on the activity table in your **Activities/Enrollments/Services** ribbon.

The Activity Status in the Status column will reflect whether the activity is open or closed. There is a legend at the bottom of the screen that explains the different status icons.

# Closing an Activity

Activities / Enrollments / Services 2

Create Activity / Service / Enrollment

Search

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute		Adult	N/A	02/23/2017	08/08/2017	<a href="#">Close</a>
	101 - Orientation Local Provider		Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

Page 1 Rows 10

To indicate that you have completed providing a service to an individual, you will close that particular activity. To close an activity, expand the **Activities/Enrollments/Services** ribbon. This will bring you to your activity table. Select the “Close” link in the far right column for the activity you wish to close.

Closure Information

Enrollment Summary: Enrollment ID: 2796674  
 Username: BRODYBRIDGES  
 WIOA Application ID: 2238703  
 Activity Code: 328  
 Activity Dates: 2/23/2017 - 8/8/2017

Last Activity Date:  Today

Completion Code: 

- None Selected
- Successful Completion
- Unsuccessful Completion
- Dropped out of activity
- Unknown status
- Void

Case Notes: [Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
41479	02/23/2017	328 Training Activity Code	Edit

Page 1 of 1 Rows: 100

<< Back **Finish** Delete

Select the **Last Activity Date**.

Select **Completion Code** from the dropdown menu. Your options for completion are shown in this slide.

Select the "Finish" button.

# Closed Activities

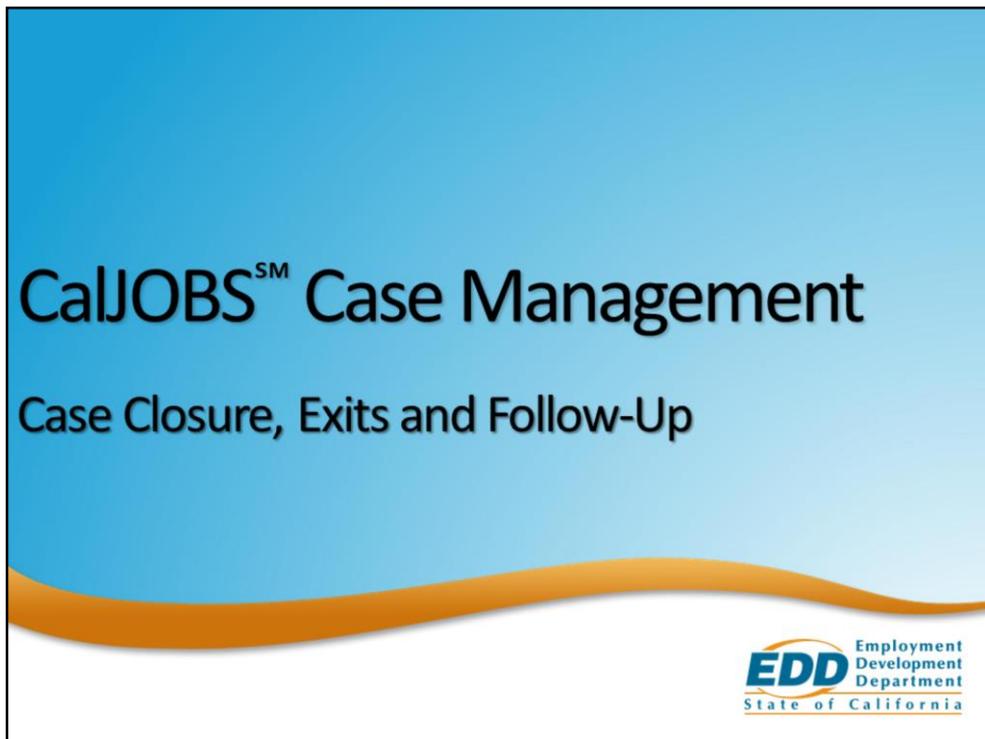
Activities / Enrollments / Services 2

[Create Activity / Service / Enrollment](#)

Search

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute		Adult	N/A	02/23/2017	08/08/2017	02/23/2017 Successful Completion
	101 - Orientation Local Provider		Adult	N/A	02/21/2017	02/21/2017	02/21/2017 Successful Completion

As a result, you will now see a closed Status. You will also see an end date and the completion result in the **Actual End Date** column.



Welcome to CalJOBS Case Management: Case Closure, Exits, and Follow-Up.

This module will illustrate how workforce staff can complete a case closure, understand exits in the system, as well as use the system for continued follow-up.

## Objectives

- Enter Measureable Skill Gains (MSG)
- Enter Credential Attainment
- Identify Closure, Exit and Outcome
- Enter Follow-Up Activities and Follow-Up Forms

At the conclusion of this training, you should be able to:

- Enter Measureable Skill Gains (MSG)
- Enter credential attainment
- Identify Closure, Exit and Outcome
- Enter Follow-Up Activities and Follow-Up Forms

# Programs Tab

Case Summary
Programs
Plan
Assessments

Show Summary Tabs
Bridges, Brody

**Filter Applications:**

**Filter Activities:**

 Open
  Closed
  Voided

**Filter Programs**

Title I - Workforce Development Apps: 1

[Create Title I - Workforce Development \(WIOA\) Application](#)

🌟
📄
📌
WIOA #15696306 - Complete

LWA:	99 - WIOA Statewide Grant Contractor	Application Date:	02/07/2017
Onestop:	2198 - HOMEBOY INDUSTRIES	Participation Date:	N/A
Open/Total Activities:	0 / 0	Closure Date:	N/A
		Exit Date:	N/A

From the **Programs** tab, click anywhere in the light gray box (outlined in pink) to expand the rest of the Title I program application sections.

# Measureable Skill Gains (MSG) in CalJOBS

# Entering a Measurable Skill Gain

The screenshot displays the CalJOBS interface for entering a measurable skill gain. At the top, there are four tabs: 'Case Summary', 'Programs', 'Plan', and 'Assessments'. Below the tabs, there is a 'Show Summary Tabs' button and the name 'Bridges, Brody'. The 'Filter Applications' section has a dropdown menu set to 'All'. The 'Filter Activities' section has three checkboxes: 'Open' (checked), 'Closed' (checked), and 'Voided' (checked). The 'Filter Programs' section has a dropdown menu set to 'Title I - Workforce Development'. Below the filters, there is a summary row for 'Title I - Workforce Development' with 'Apps: 1'. A pink arrow points to the 'Measurable Skills Gain' ribbon, which shows a count of '0'. Below the ribbon, there is a link 'Create Measurable Skills Gain' and a blue message: 'Please enter EFL gains in the Literacy & Numeracy screen.' At the bottom of the ribbon, it says 'There are no records to display.'

To enter a measurable skill gain into CalJOBS, navigate to the **Measurable Skill Gains** ribbon of the individual's Title I program application, then select the [Create Measurable Skill Gain](#) link.

Note the message in blue, stating that Educational Functioning Level (EFL) gains are to be entered in the Literacy & Numeracy ribbon.

# Measurable Skill Gains

**General Information**

User Login: Brody Bridges

State ID: 1002206924

User ID: 31378461

Name: Brody Bridges

Program:   
 \* LWDB:   
 \* Office:

**Skill Attainment Information**

Fill in the following information for the skill achievement. **Program:** Title I - Workforce Development

\* **Skill Type:** None Selected

\* **Date Skill Attained:**  Today

\* **Type of Achievement:** None Selected

\* [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

**None Selected**

Completed minimum of 12 credit hours in semester and meets academic standards

Part-time student and completed at least 12 credit hours over the course of two completed consecutive semesters and meets academic standards

Report card/transcript for one semester and meets academic standards

Achieved satisfactory or better progress report towards an established OJT training milestone - not previously recorded

Completed 1 year of Registered Apprenticeship program and achieved satisfactory or better progress report

Other training milestone

Successfully completed a required exam for a particular occupation

Satisfactory progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams

Other skills progression achievement

Here you will enter the MSG information. The first section of this screen, **General Information**, will populate with the individual's information as well as your LWDB and Office Location.

In the **Skill Attainment Information** section, enter information for the skill achievement. The **Program** field is pre-filled with information entered in the program application. Select the appropriate skill type from the **Skill Type** drop-down, and then enter the date the individual attained the skill in the **Date Skill Attained** field. Next, use the drop-down field to enter the **Type of Achievement**. In this example, you will see comprehensive options of all the types of achievement. However, what populates as an option in this field is dependent on what you selected in the Skill Type field.

# Measurable Skill Gains

**Staff Information**

[ Add a new Case Note | Show Filter Criteria ]

ID	Create Date	Subject	Action
No data found.			

**Individual Signature**

Create PDF

Include Staff Signature

Applicant Signature

Save Cancel

**Measurable Skills Gain** 1

[Create Measurable Skills Gain](#)

Please enter EFL gains in the Literacy & Numeracy screen.

Search:

Date Achieved	Skill Type	Last Edited By	Last Edited Date	Action
03/15/2017	Post-Secondary Transcript/Report Card	Richmond, Lyndsey (30292415)	03/15/2017 11:09 AM	<a href="#">Edit</a> <a href="#">Print</a>

Once the **Skill Attainment Information** section is complete, complete optional the **Staff Information** fields, if desired, and select the “Save” button.

The information entered will now populate on a table within the **Measurable Skill Gains** ribbon.

# Educational Functioning Level (EFL)

# Educational Functioning Level

Case Summary
Programs
Plan
Assessments

Show Summary Tabs
Bridges, Brody

**Filter Applications:**

All

**Filter Activities:**

Open   
  Closed   
  Voided

**Filter Programs**

Title I - Workforce Development

Title I - Workforce Development

Apps: 1

**Literacy & Numeracy** 0

[Create Literacy & Numeracy Records](#)

There are no records to display.

CalJOBS provides a data collection method to record pre-test data, and allows entry of multiple progress assessments for each participation year that allows staff to flag the progress assessment as the participation year’s posttest, for federal reporting purposes.

To enter pre-test and post-test information for the EFL measure, expand the **Literacy & Numeracy** ribbon and select the Create Literacy & Numeracy Records link.

# Educational Functioning Level

The screenshot displays a web form titled "Educational Functioning Level". It is divided into two main sections: "General Information" and "Assessment Information".

**General Information:**

- Participant - Last 4 SSN: Brody Bridges (\*\*\*-\*\*-5555)
- Case ID: 17168687
- \* Customer Group: Adult (dropdown menu)
- Participation Year: 1
- \* LWIA/Region: None Selected

**Assessment Information:**

- \* Test Type: Pre-Test
- \* Assessment Category: None Selected (dropdown menu)
  - None Selected
  - TABE 7-8, 9-10
  - CASAS
  - BEST Literacy
  - BEST Plus
  - TABE CLAS-E
  - Wonderlic GAIN
  - Massachusetts Adult Proficiency Test (MAPT)
- \* Type of Assessment: None Selected (dropdown menu)
  - None Selected
  - Reading
  - Writing
  - Language
  - Mathematics
  - Speaking
  - Oral (L&W Listening)
  - Other Literacy Functional Area
  - Other Numeracy Functional Area
- Assessment Type Other: [Text input field]
- Assessment Form/Version info: [Text input field]
- \* Functional Area: None Selected (dropdown menu)
  - None Selected
  - Reading
  - Writing
  - Language
  - Mathematics
  - Speaking
  - Oral (L&W Listening)
  - Other Literacy Functional Area
  - Other Numeracy Functional Area
- Other Functional Area: [Text input field]

The first section of the Literacy & Numeracy screen is the **General Information** section. This section has many pre-filled fields, just be sure that those that are required are answered correctly.

Within the **Assessment Information** section, select "ABE" if participant was assessed using approved tests for Adult Basic Education. Select "ESL" if participant was assessed using approved tests for English-as-a-Second-Language. The options in the **Type of Assessment** field are dependent on what you select in the Assessment Category section. Select the type of assessment from the drop-down. The options in the **Functional Area** are the Educational Functioning Levels the assessment instrument is designed to evaluate, and are dependent on what you select in the Type of Assessment section.

# Educational Functioning Level

**Pre-Test**

- \* **Date of Pre-Test:**  Today
- \* **Pre-Test Score:**
- \* **Educational Functioning Level:** None Selected
- Score reflects Basic Skills deficient:** No

**Staff Information**

**Position:** Staff

**Current Case Manager:** Case currently Not Assigned to a Case Manager  
[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

[Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

Save

Next, complete the fields in the **Pre-Test** section. First, enter the date of the pre-test in the **Date of Pre-Test** field, then enter the score the individual received in the **Pre-Test Score** field. The entered score will determine the value that the system assigns to the **Educational Functioning Level** and **Score reflects Basic Skills deficient** fields; this value is system set and cannot be modified.

Enter the optional information in the **Staff Information** section, if desired, and select the "Save" button.

# Educational Functioning Level

The screenshot displays the 'Literacy & Numeracy' ribbon with a '1' in the top right corner. Below the ribbon title is a search bar and a link to 'Create Literacy & Numeracy Records'. A table is shown with the following data:

Funct Area - Assess Category	Pre-Test		Year 1 Post		Year 2 Post		Year 3 Post	
	Date	Funct Lvl	Date	Funct Lvl	Date	Funct Lvl	Date	Funct Lvl
Mathematics	10/11/2017	5						

Below the table is a 'Progress/Post Assessments' section with the text: 'No progress or post test records found.' and a note: 'Assessments beyond Year 3 are not reportable in the federal extract file, and will not count in federal performance calculations.' A pink arrow points to a link: 'Create Progress/Post Assessment Record'.

After entering the pre-test information, it will populate into a table on the **Literacy & Numeracy** ribbon.

If you select the link in the "Funct Area- Assess Category" column, you will be directed to a screen much like the one previous, however, an additional section will be available. The **Progress/Post Assessment** section includes the Create Progress/Post Assessment Record to enter post-test information.

# Educational Functioning Level

Progress/Post Assessments

\* Test Type: Progress Test  
Post-Test

Assessment Form/Version info:

\* Progress Test Score:

\* Educational Functioning Level: None Selected

\* Date Assessed:  Today

Participant remains Basic Skills deficient: No

\* Position: Staff

Save

Within the Progress/Post Assessments section, first select the type of post-test that the individual was given from the **Test Type** drop-down menu.

Next, enter the score the individual received in the **Progress Test Score** field. The score you enter here will determine the value that the system assigns to the **Educational Functioning Level** and **Participant remains Basic Skills deficient** fields; this value is system set and cannot be modified. Enter the appropriate test date in the **Date Assessed** field, and select your **Position** if not already populated.

Finally, select the “Save” button to save your information.

# Credential Attainment in CalJOBS

# Creating a Credential

Case Summary Programs Plan Assessments

Show Summary Tabs Bridges, Brody

Filter Applications: All

Filter Activities:  Open  Closed  Voided

Filter Programs: Title I - Workforce Development

Title I - Workforce Development Apps: 1

**Credentials**

[Create Credential](#)

You may enter credential attainment information in the **Credentials** ribbon. To create a credential, expand the gray ribbon called **Credentials**.

Click the "Create Credentials" link.

**General Information**

Program: WIOA  
 Application Number: 2238442  
 Name: Wayne, Bruce  
 Application Date: 12/12/2016  
 Program Participation Date: 12/12/2016  
 Exit Date: Not Applicable  
 Maximum date to record after exit: Not Applicable

• LWIA/Region: None Selected  
 • Office Location: Select an LWIA/Region

**Credential Information**

• Credential Received: None Selected  
 Other Credential:  
 Credential Verification: [ Verify | Scan | Upload | Link ]  
 • Date Credential Received: (mm/dd/yyyy) Today  
 Associated to Activity: Search Activities

**None Selected**  
 High School Diploma  
 Secondary / High School Equivalency  
 AA/AS Degree  
 BA/BS Degree  
 Occupational Skills License  
 Occupational Skills Certificate or Credential  
 Other Recognized Diploma, Degree, or Certificate (specify)  
 Graduate/Post Graduate Degree  
 Occupational Certification

Activity	Provider	Service/Course	Actual Begin Date	Projected End Date	Actual End Date	Completion Status	Action
300 - Occupational Skills Training (Approved ETPL Provider)	State Center Community College District	Welding - Metal Fabrication (FCC)	10/09/2017	06/15/2018			Select

Save

Under the **General Information** section, choose your LWIA/Region, then choose your organization from the **Office Location** drop down menu.

In the **Credential Information** section, select the appropriate credential attainment option from the **Credential Received** drop-down menu. The **Credential Verification** field is available for use if you would like verify the credential and upload documentation in CalJOBS. If the Verify link is not utilized, the statement “Copy containing in Case File” will result.

Next, complete the **Date Credential Received** field. Finally, although not marked with a red asterisk, it is required that you select the Search Activities link from the **Associated to Activity** field to associate an activity to this credential attainment. Click the Select link from the “Action” column for the appropriate activity code, and the information will populate into the **Associated to Activity** field.

To finish, select the “Save” button.

# Closure, Exit, and Outcome

## Creating a Case Closure

Entering information into the Closure ribbon is optional, as the information entered is not included in Federal Reporting, but it is still a useful feature within CalJOBS.

# Case Closure

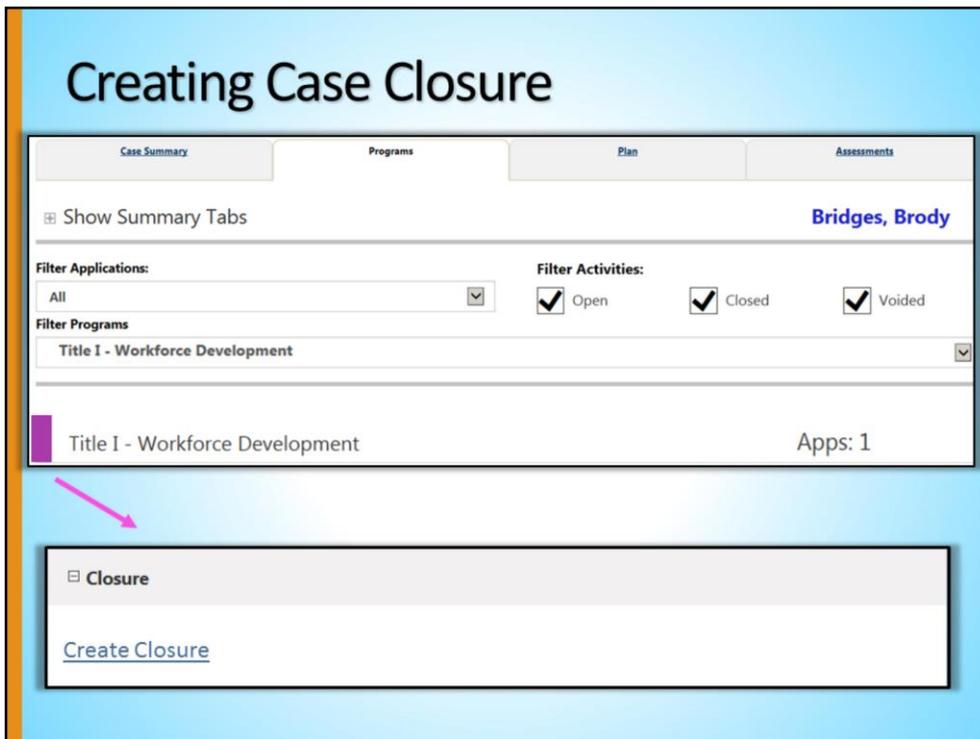
Activities / Enrollments / Services

Create Activity / Service / Enrollment

Search:

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	205 - Development of JEP/ISS/EDP SETA Satellite Services		Adult	N/A	12/12/2016	01/01/2017	12/12/2016 Successful Completion
	219 - Work Experience MC3 Pre-Apprenticeship Training		Adult	N/A	12/12/2016	01/10/2017	12/12/2016 Successful Completion
	101 - Orientation No Provider Information		Adult	N/A	12/12/2016	12/12/2016	12/12/2016 Successful Completion

After expanding the Title I Application, and expanding the **Activities/Services/Enrollments** ribbon, you will see the activities table. This table shows that all activities have been closed out. You cannot complete a closure, unless all activities are closed. Once all activities are closed, you can complete a closure.



With the Title I Application expanded, click anywhere in the gray ribbon called **Closure** to expand it.

Click the "Create Closure" link.

The image shows a screenshot of a web form titled "General Information". The form contains the following fields and values:

- Username:** 32574
- Name:** Bridges, Brody
- Last service date:**
- Exit Date:**
- Exit Reason:**
- LWIA:** 36 San Jose Silicon Valley, Workforce Investment Netw
- Office Location:** Your Office (dropdown menu)
- Agency Code Search:** [Agency Code Search](#)
- Agency Code:** N/A
- Case closure date:** 02/14/2017
- Accountability Closure/Exit Status:** None Selected (dropdown menu)

The dropdown menu for "Accountability Closure/Exit Status" is open, showing the following options:

- None Selected
- 1 - Invalid SSN or failed to disclose SSN
- 2 - Retirement
- 3 - Neither condition applies

A pink arrow points to the dropdown arrow of the "Accountability Closure/Exit Status" field.

After selecting the “[Create Closure](#)” link, under **General Information** enter your **Office Location** if it is not populated.

Choose the **Accountability Closure/Exit Status** by selecting the drop-down arrow. Options are shown on this slide. You will most likely choose option 3 – “Neither condition applies.”

The screenshot shows a web form with a light blue background. At the top, there is a section titled "Outcome Information" in a blue rounded rectangle. Below this, the "School Status at Exit" field is shown with a dropdown menu currently displaying "Not attending school, H.S. Graduate". Below the dropdown are links for "[ Verify | Scan | Upload | Link ]" and a checkmark icon followed by the text "Documentation in Case File". A pink arrow points from the dropdown menu down to a separate box containing a list of options: "None Selected", "In-school, High School or less", "In-school, Alternative School", "In-school, post High School", "Not attending school, or H.S. Dropout", "Not attending school, H.S. Graduate" (highlighted in blue), and "Not attending school; within age of compulsory school attendance". Below this, the "Youth Placement at Exit" field is shown with a dropdown menu displaying "None Selected" (highlighted in blue). Below this dropdown is a "Placement Date:" field with a date input box showing "day".

Scrolling down, under **Outcome Information**, select the appropriate **School Status at Exit** from the dropdown menu. Our example shows “Not attending school, H.S. Graduate.”

If your individual is a Youth, you may have a **Youth Placement at Exit** field. If so, select the appropriate option from the dropdown.

None Selected

Yes

Yes, Recall Employer

No

Employment Information

Entered Employment:

No employers available.

[ Add Employer ]

Staff Information

[ Add a new Case Note | Show Filter Criteria ]

ID	Create Date	Subject	Action
No data found.			

Current Case Manager:

Case currently Not Assigned to a Case Manager

[Assign Case Manager](#)

[Assign Me](#)

[Remove Case Manager Assignment](#)

Save Cancel Delete

Closure

[Edit Closure](#)

Closure Date: 02/23/2017

Finally, choose whether or not the individual entered employment in the **Employment Information** section.

If “Yes” is chosen, the employer information must be completed in the system by selecting the “[Add Employer](#)” link.

“Yes, Recall Employer” can be selected if the individual returns to work for a previous employer, and that employer has been captured in CalJOBS.

If “No” is chosen, complete the **Staff Information** if applicable. Select the “Save” button to generate a case closure. The case closure date will now appear within the **Closure** ribbon of the Title I Application.

Add/Edit Employer

### Employer Information

[Search Individual Employment History](#)   [Select from Internal Job Order/Placement](#)

\* **Employer Name:**

**Verify Employer Name:**   [\[ Verify | Scan | Upload | Link \]](#)

**Employer FEIN:**

**Address Line 1:**

**Address Line 2:**

**City:**

**State/Province:**

**County/Parish:**

**Zipcode:**

**Find Zip Code:**   [\[ USPS \]](#)

**Country:**

**Industry Code (NAICS):**   [Search for NAICS Code](#)

**Industry NAICS Code:**

**Industry NAICS Description:**

\* **Primary Employer Contact Name:**

\* **Primary Employer Contact Phone Number:**  -  -  Ext

**Primary Employer Contact Email:**

**Is this employer a federal contractor?**    Yes  No

If you selected the “[Add Employer](#)” link (shown on the previous slide), please complete the required fields. When typing into the **Employer Name** field, the system may populate a drop-down of potential employers. For example, if you begin typing “Target”, a list of possible Target locations will populate as options. If you select the employer from the drop-down, much of the information in the subsequent fields (address, NAICS Code, and contact number) will be entered with the appropriate information. You must ensure all required fields are complete before moving to the next section.

If you begin to type in an employer and the system does not populate options in the drop-down, you can still enter the employer’s information manually.



# Added Employment Information

Employment Information

• Entered Employment:

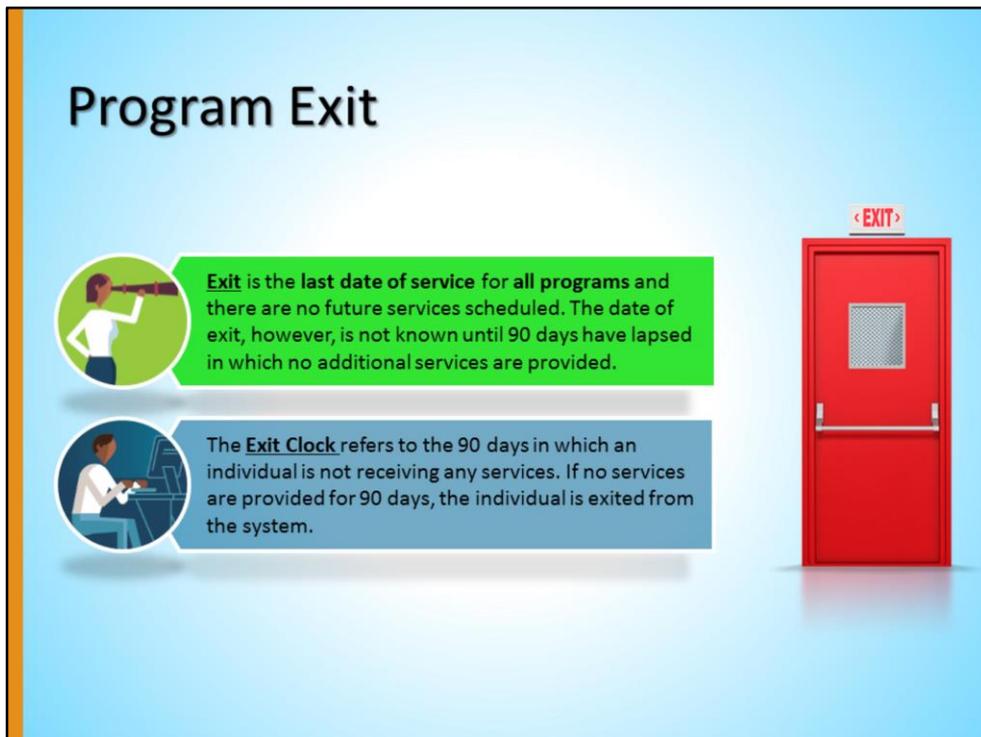
Employer Name	Job Title	Start Date	End Date	Non-Traditional	Training Related	Action
Target	Customer Service Representativ	02/23/2017		No	No	<a href="#">Edit</a> <a href="#">Delete</a>

[\[ Add Employer \]](#)

This table will populate in the case closure screen as a result of entering the employment information.

# Program Exit and Outcome

# Program Exit



The infographic features a light blue background with a vertical orange bar on the left. On the right, there is a red exit door with a white handle and a red sign above it that says '< EXIT >'. Two callout boxes are positioned on the left. The top callout is green and contains an icon of a person looking through a telescope. The bottom callout is blue and contains an icon of a person sitting at a desk with a computer monitor.

**Exit** is the last date of service for all programs and there are no future services scheduled. The date of exit, however, is not known until 90 days have lapsed in which no additional services are provided.

The **Exit Clock** refers to the 90 days in which an individual is not receiving any services. If no services are provided for 90 days, the individual is exited from the system.

Program exit is an important concept for staff to understand. We will define exit and the exit clock.

**Exit** is the **last date of service for all programs** and there are no future clock restarting services scheduled. The date of exit, however, is not known until 90 days have lapsed in which no additional services are provided.

The **Exit Clock** refers to the 90 days in which an individual is not receiving any services. If no services are provided for 90 days, the individual is exited from the system.

# Program Exit



Any additional services requiring significant staff involvement **do** restart the Exit Clock. Self-service, information-only, follow-up, and supportive services **do not** extend the Exit Clock.



The exit is initiated automatically by CalJOBS as soon as the 90 day Exit Clock has lapsed. Note: the exit date is the last date of service not the last day of the Exit Clock.



When it comes to services, any additional services requiring significant staff involvement **do** restart the Exit Clock. Self-service, information-only, follow-up, and supportive services **do not** extend the Exit Clock.

The exit is initiated automatically by CalJOBS as soon as the 90 day Exit Clock has lapsed. Note: the program exit date is applied *retroactivity* to the last service's actual end date. This means the exit date is the last date of service not the last day of the Exit Clock.

# Closure vs. Outcome

## Closure

- Case management tool
- Manually entered by staff
- Does not exit the client from the program
- Not required to exit the client from the program

## Outcome

### Exit

- System generated
- Exits client from the program (also called “soft exit” or “common exit”)

### Exclusionary Outcome

- Manually entered by staff due to incarceration, hospitalization, medical treatment, active military duty, ineligibility (VR only), or death

We covered how to create a closure in CalJOBS, but it is important to know that closure and exit/outcome are **not** the same thing.

**Closure** = closing a program. (Not to be confused with closing an activity). Closure is manually entered by staff, does not exit the client, and is not required for the client to exit.

Closing a program gives staff the ability to add follow-up activities, enter employment attainment information, and allows staff to run reports quicker.

**Exit/Outcome**= system generated, occurs on last date of service, signaling that a participant is no longer in the program. Or, a client may exit based on an exclusionary outcome, which is very rare.

# How do we know if an activity restarts the exit clock?

## WSIN17-09, Attachment 3

### CalJOBS Activity Codes Detailed Listing - Individual

#	Activity Code Name	Adult/ DW	Youth	WP	JVSG	MSFW	TAA	Reporting Category	Exit Clock?	PIRL	Duration (Days)
108	Referred to WIOA Services (not training)			x	x	x		Basic Career Service (Staff-Assisted)	NO	1113	1
109	Referred to Community Resource	x		x	x	x		Basic Career Service (Staff-Assisted)	NO	1113	1
110	Attended Rapid Response	x		x		x		Housekeeping	NO	Not Reported	1
112	Job Fair	x		x		x		Basic Career Service (Self-Service Information-Only Activity)	NO	1100	1
114	Job Referral: Federal Contractor Job Listing (FCIL)	x		x	x	x		Basic Career Service (Staff-Assisted)	YES	1109, 1218	1

To learn if an activity code restarts the exit clock, refer to your Activity Codes listing found in the Workforce Services Information Notice 17-09. Within attachment 3, there is a column that indicates whether or not an activity restarts the exit clock.

# Program Exit

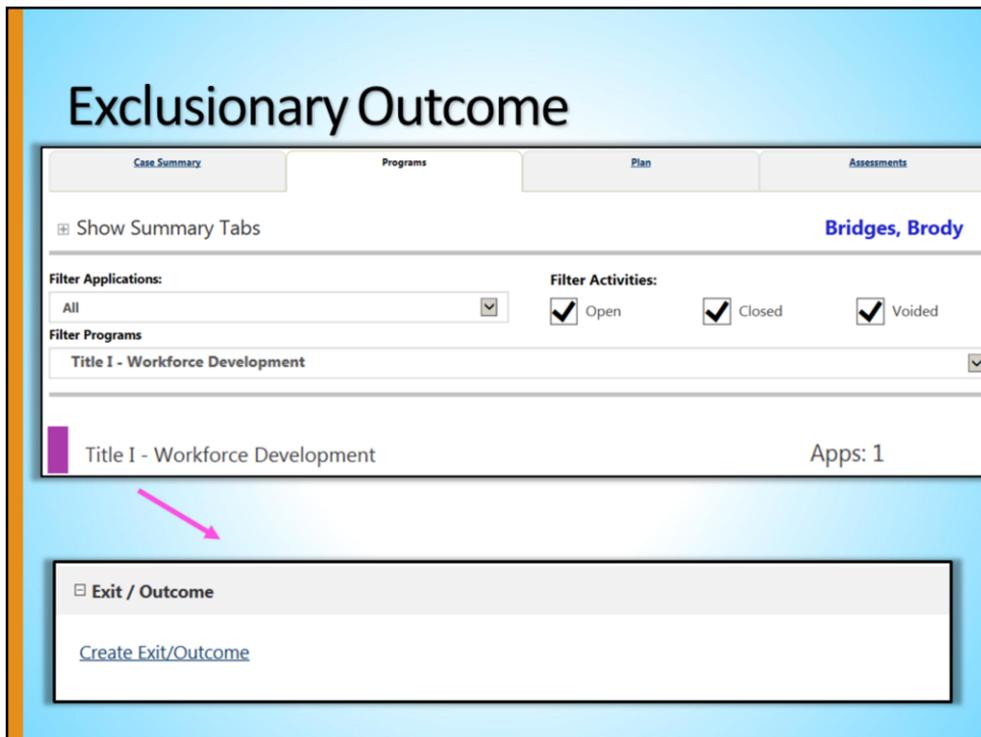
How does this work in the system?

WP #199209 - Case Closed			
LWIA:	25 - City of Oakland Community and Economic Development	Application Date:	09/05/2011
Onestop:	898 - 03300 Oakland/Alameda (WSB)	Participation Date:	09/05/2011
Total Activities:	1	Exit Date:	11/03/2011

Exit / Outcome	
<a href="#">Edit Exit/Outcome</a>	
Exit Date: 11/03/2011	Exit Reason: Soft Exit

The system exits the participant when 90 days have passed since the last date of service across Title I, TAA, and Title III-WP applications. You will find the program exit information within the individual's Title I program application. You will notice a date in the **Exit Date** field in the top portion of their Title I application information, as well as dates and exit reason on the **Exit/Outcome** ribbon.



In limited circumstances, a staff member has the ability to tell the system, “I know for certain that this person is not coming back to receive more services”. Instead of waiting the 90 days, the participant exits immediately. This is called an Exclusionary Outcome.

An Exclusionary Outcome is ONLY used when an individual cannot complete the program due to certain circumstances, such as death, significant health issues, or incarceration.

You would only use this option when there is documentation proving that the Exclusionary Outcome exists. Please be sure to consult with co-enrollment or open applications with other Local Areas prior to completing an Exclusionary Outcome.

To complete an Exclusionary Outcome, select the “[Create Exit/Outcome](#)” link.

**General Information**

**Login Name:** BATMAN2016

**User ID:** 32574

**State ID:** 31637

**Name:** Bruce Wayne

• **LWIA/Region:** None Selected

• **Office Location:** None Selected

• **Staff Position:** Staff

---

**Exit Information**

• **Exit Date:** 04/23/2017 [Today](#)

• **Exit Reason:**

- None Selected
- Institutionalized
- Healthy/Medical
- Deceased
- Reservist called to Active Duty
- In Foster Care and moved from area by foster care system

Choose your **LWIA/Region**, **Office Location**, and **Staff Position** from the drop down menus, if not already populated.

Under the **Exit Information** section, enter the **Exit Date** (last date the individual received a service).

Choose the exclusionary outcome reason from the **Exit Reason** drop down menu. Again, these are the only reasons an Exclusionary Outcome would be completed.

The screenshot displays a web application interface with a light blue background. At the top, there is a section titled "Alternate Contact Information" with a sub-header "Manage Alternate Contacts". Below this is a "Contact List" section, which is currently empty and displays the text "No Contacts for individual".

Below the contact list is a section titled "Staff Information". It includes a sub-header "Add a new Case Note" and a link "Show Filter Criteria". There is a table with the following columns: "ID", "Create Date", "Subject", and "Action". The table is currently empty and displays the text "No data found."

Below the table is a section titled "Current Case Manager:". It displays the text "Case currently Not Assigned to a Case Manager" and three links: "Assign Case Manager", "Assign Me", and "Remove Case Manager Assignment".

Below the "Current Case Manager:" section is a "Comments:" section with a text input field.

At the bottom of the interface, there are four buttons: "Save", "Cancel", "Delete", and "Print". The "Save" button is circled in pink.

Complete the **Alternate Contact Information** and **Staff Information** sections, if desired.

Select the "Save" button.

# Exclusionary Outcome - Displayed

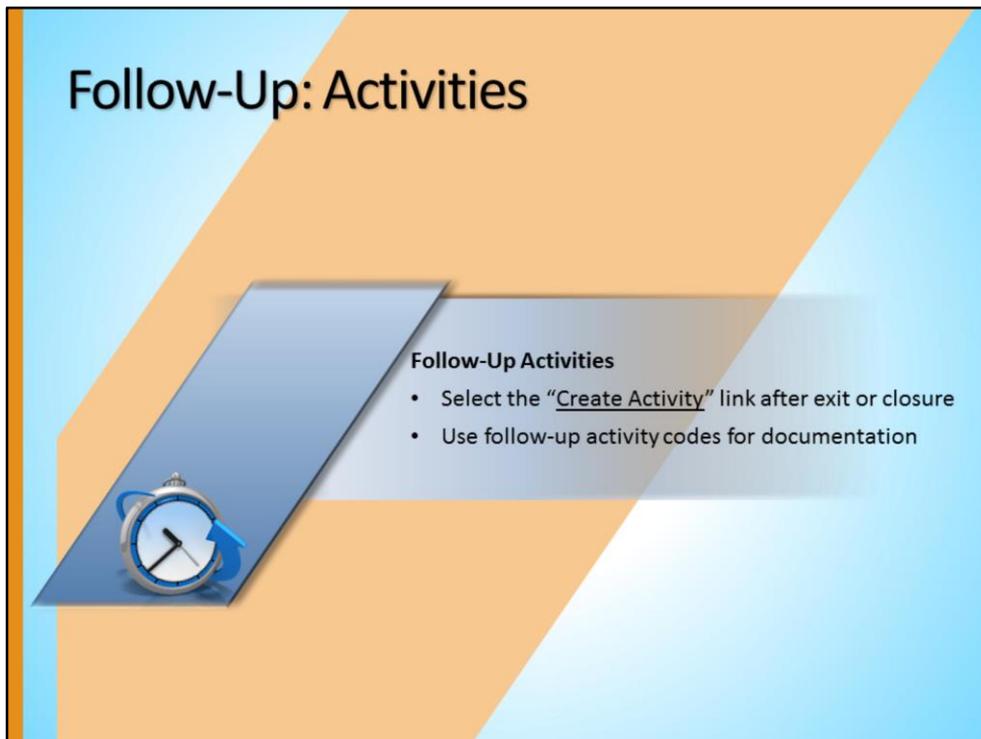
The screenshot displays a software interface with a light blue header and a white main content area. At the top, there are four tabs: 'Case Summary', 'Programs', 'Plan', and 'Assessments'. Below the tabs, there is a 'Show Summary Tabs' button and the name 'Bridges, Brody'. The interface includes several filter sections: 'Filter Applications' with a dropdown menu set to 'All', 'Filter Activities' with three checked checkboxes for 'Open', 'Closed', and 'Voided', and 'Filter Programs' with a dropdown menu set to 'Title I - Workforce Development'. A purple bar highlights the 'Title I - Workforce Development' program, with 'Apps: 1' displayed to its right. A pink arrow points from this bar down to an 'Exit / Outcome' section. This section shows the date '04/23/2017', a link 'Edit Exit/Outcome', and the text 'Exit Date: 04/23/2017' and 'Exit Reason: Institutionalized'. The 'Exit Reason' text is circled in pink.

This is what the Exclusionary Outcome will look like if completed in the system.

## Follow-Up Activities and Follow-Up Forms

After a closure is created or when an individual exits the program, follow-up activities populate as options when adding an activity code.

# Follow-Up: Activities



**Follow-Up Activities**

- Select the “Create Activity” link after exit or closure
- Use follow-up activity codes for documentation

Follow-up activities can be created after exit or after creating closure, by selecting the “Create Activity/ Enrollment/ Service” link from the **Activities/Enrollments/Services** ribbon. Follow-up codes are used for documentation of the services you provide after closure or exit.

## Follow-Up Activities

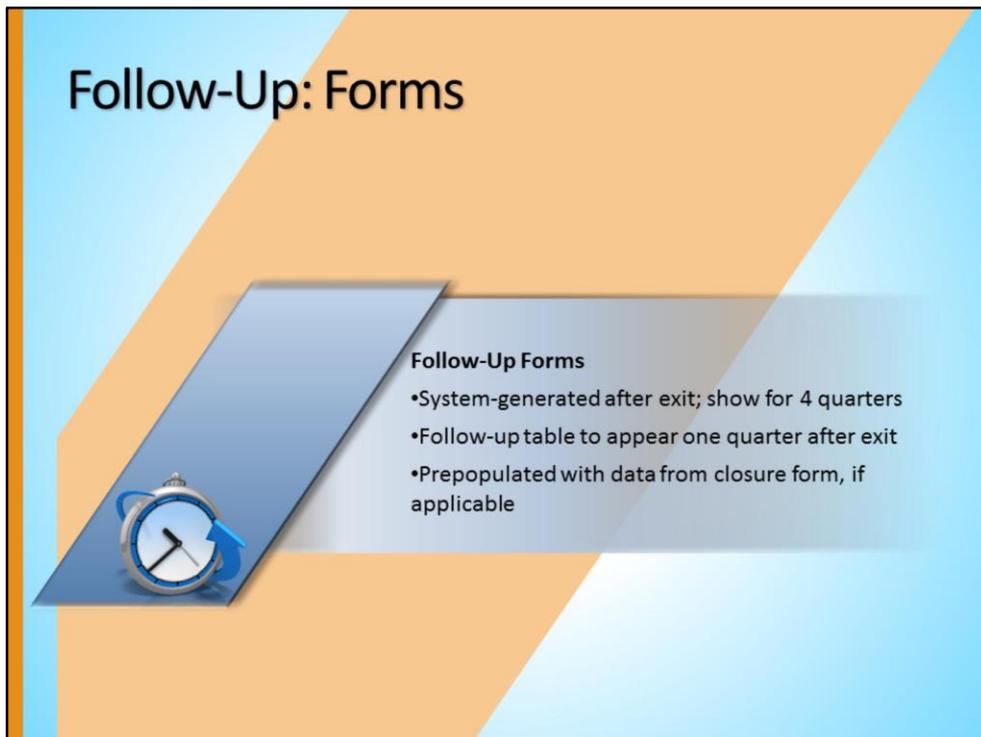
Activity Code	Activity Title
F01	Referral to Community Resources
F02	Referral to Medical Services
F03	Tracking Progress on the Job
F04	Work-Related Peer Support Group
F05	Assistance Securing Better Paying Job
F06	Career Development and Further Education Planning
F07	Assistance with Work-Related Problems
F08	Adult Mentoring
F09	Tutoring
F10	Leadership Development
F12	Supportive Service: Transportation
F13	Supportive Service: Purchase Work-Related Uniform/Attire
F14	Supportive Service: Purchase Work-Related Tools
F15	Supportive Service: Housing Assistance

This is a list of possible follow-up codes you can enter into CalJOBS. These are known as F-codes because the activity codes to choose from all begin with the letter “F.”

## Follow-Up Activities/F-Codes

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
	<a href="#">E10 - Leadership Development</a> Napa Valley Adult School		Adult	N/A	02/23/2017	02/23/2017	<a href="#">Close</a>
	<a href="#">202 - Career Guidance/Planning</a> No Provider Information		Adult	N/A	12/12/2016	12/12/2016	<a href="#">12/12/2016</a> Successful Completion
	<a href="#">101 - Orientation</a> No Provider Information		Adult	N/A	12/12/2016	12/12/2016	<a href="#">12/12/2016</a> Successful Completion

The F-Code will populate in the Activity table as a Follow-up service. To close the activity, follow the same steps as closing out a regular activity.



Follow-up is intended to support the participant in retaining employment and continuing to improve their employment success after exit. The WIOA Follow-Up form assists staff in predicting federal performance and collects data that may be used as supplemental sources for federal reporting.

In CalJOBS, the system generates a follow-up table with follow-up forms for 4 quarters after exit. This table does not populate until after the 90<sup>th</sup> day after exit. If the closure tab was utilized, data from that tab may pull over into the follow-up forms.

# Follow-Up Forms

Case Summary
Programs
Plan
Assessments

Show Summary Tabs
Bridges, Brody

**Filter Applications:**

**Filter Activities:**

 Open
  Closed
  Voided

**Filter Programs**

Title I - Workforce Development

Apps: 1

**Follow-ups** 4

[Create Local Follow Up](#)

Search:

Required By	Date Complete	Status	Follow Up Type
09/30/2017		Required	1st Quarter After Exit
12/31/2017		Required	2nd Quarter After Exit
03/31/2018		Required	3rd Quarter After Exit
06/30/2018		Required	4th Quarter After Exit

Within the Title I program application, there is a ribbon titled “Follow-ups”. This section is for entering follow up information, including employment information.

To enter follow-up information, select the link in the “Follow Up Type” column for the quarter you would like to enter follow-up information.

Please note: Case managers can record follow ups only in the current quarter for federal reporting requirements. The system does not allow federal follow-ups to be recorded outside the designated quarterly time periods. If you click a follow-up link prematurely, the system will display an alert stating “This follow-up start date is beyond the current date. Unable to edit record.”

The first section, General Information, populates with system information. **Alternate Contact Information** and **Contact Attempts** can be recorded in the corresponding sections, if desired.

In the **Follow-Up Employment Information** section, if you had previously entered employment information in the closure tab, that information would populate in the **Employer Name** field. If the individual was still working for that employer in the quarter defined in the **Worked in Quarter?** question, there is no need to add employer information.

If employment information was not entered into the closure tab, because the individual was not working at the time of the closure or if staff did not complete the closure tab, you will see a message in the **Employer Name** section, “No Employment information”. If you answer “Yes” to the **Worked in Quarter?** Question, employment information needs to be entered by using the Add Employer link. The employer entry screen is the same screen as the one in the closure tab.

# Follow-Up Forms

**Youth Placement Information**

**Youth Placement and Date at Case Closure:** Not Applicable

**Previous Follow-up Placement and Date Information:** Not Applicable

**\* Current Placement (WIA):**  

- Entered post-secondary education
- Entered Advanced training
- Entered Military Service
- Entered a qualified apprenticeship
- None of the above

**Date Of WIA Placement:**

**Current Placement (WIOA):**  

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

Next, if your individual is a Youth, you will encounter the **Youth Placement Information** section. Complete the Current Placement (WIA) field by selecting the appropriate answer from the drop-down.

# Follow-Up Forms

**Exit and Closure Information**

**Exit Date:** 07/17/2017

**Employment Status:**

**Youth Status at Exit:** No Closure Employment Information

**Placement Status at Exit:** Not Applicable

**Current Status at Follow-up**

**Follow-up Information:**

\* **Actual Date of Follow-Up:**  Today

\* **Contact Type:**  ▼

**Other (specify):**

\* **Received 12 months of Follow-Up services**  Yes  No

*This section is required only when no employment, no youth placement and no youth diploma/credential is recorded on the follow-up screen.*

**Follow-up Status**

**Status at Follow-Up:**  ▼

**Other (specify):**

**Comments:**

**None Selected**

- Telephone - Individual
- Telephone - Employer/School
- Letter or Survey Sent to Individual
- Letter or Survey Sent to Employer/School
- Worksite visit
- Home Visit
- Other (Specify)

**None Selected**

- Institutionalized
- Relocated to Mandated Residential Program (youth)
- Retirement
- Health/Medical
- Deceased
- Reservist called to Active Duty
- Family Care
- Lacks Transportation
- Cannot Locate
- Exit (Transferred) to other LWIA
- Refused to Continue
- Other (specify)
- Transferred to other funding

If your individual is not a Youth, the next section you will see if the **Exit and Closure Information** section. This information is system generated.

In the Current Status at Follow-up section, complete the required fields. Enter the date of the follow-up in the **Actual Date of Follow-up** field and select the appropriate **Contact Type**. You can choose from a variety of options, shown on this slide.

Next, you may need to answer the mandatory question, **Received 12 months of Follow-up services**.

As noted by the blue text, the following fields are only required when no employment, no youth placement and no youth diploma/credential is recorded on this screen. If that is the case, answer the **Status at Follow-Up** question with one of the many options.

# Follow-Up Forms

**Staff Information**

\* **LWIA/Region:**

\* **Office Location:**

**Agency Code:** [Agency Code Search](#)  
 -

**Staff User Create:** GISISOFTEXT

**Create Date:** 09/08/2017

**Staff User Edit:** GISISOFTEXT

**Edit Date:** 09/08/2017

[ [Add a new Case Note](#) | [Show Filter Criteria](#) ]

ID	Create Date	Subject	Action
No data found.			

**Current Case Manager:**

Case currently Not Assigned to a Case Manager  
[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

Finally, ensure the LWIA/Region and Office Location fields are complete, and answer any remaining fields, if desired. Select the “Save” button to finish the follow-up entry.

# Follow-Up Forms

Follow-ups 4

[Create Local Follow Up](#)

Search:

Required By	Date Complete	Status	Follow Up Type
09/30/2017	08/30/2017	Completed	<a href="#">1st Quarter After Exit</a>
12/31/2017		Required	<a href="#">2nd Quarter After Exit</a>
03/31/2018		Required	<a href="#">3rd Quarter After Exit</a>
06/30/2018		Required	<a href="#">4th Quarter After Exit</a>

The completed follow-up will now appear within the table on the **Follow-ups** ribbon, noted by the date it was complete. To edit the follow-up, select the corresponding link in the “Follow Up Type” column.

# Questions



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