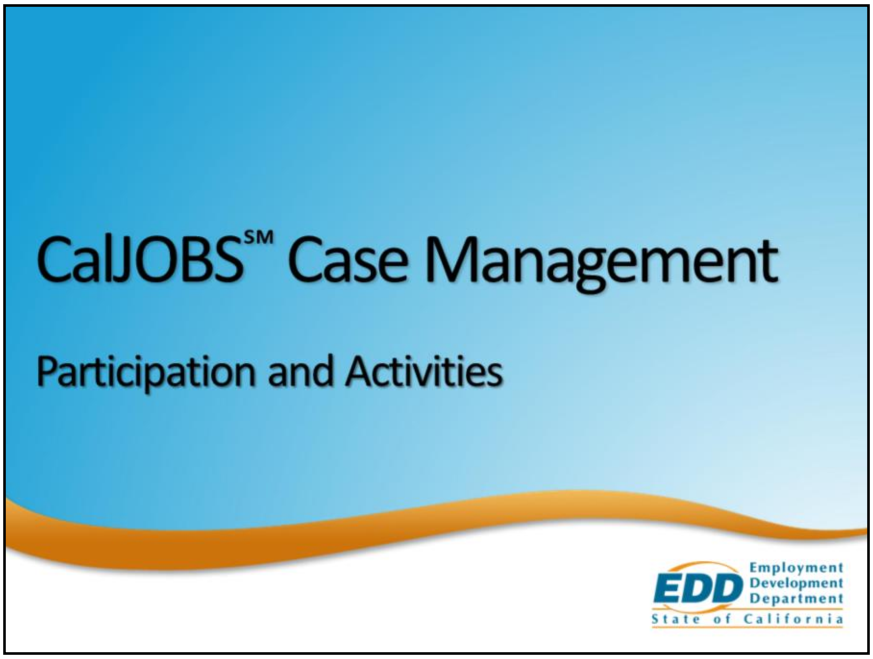
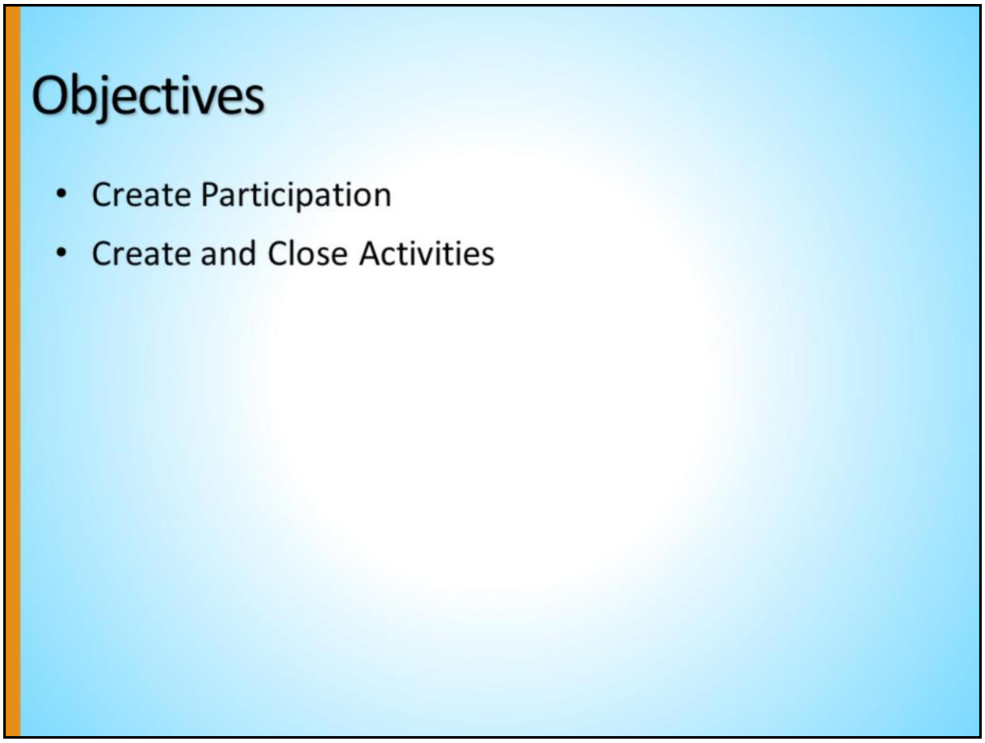


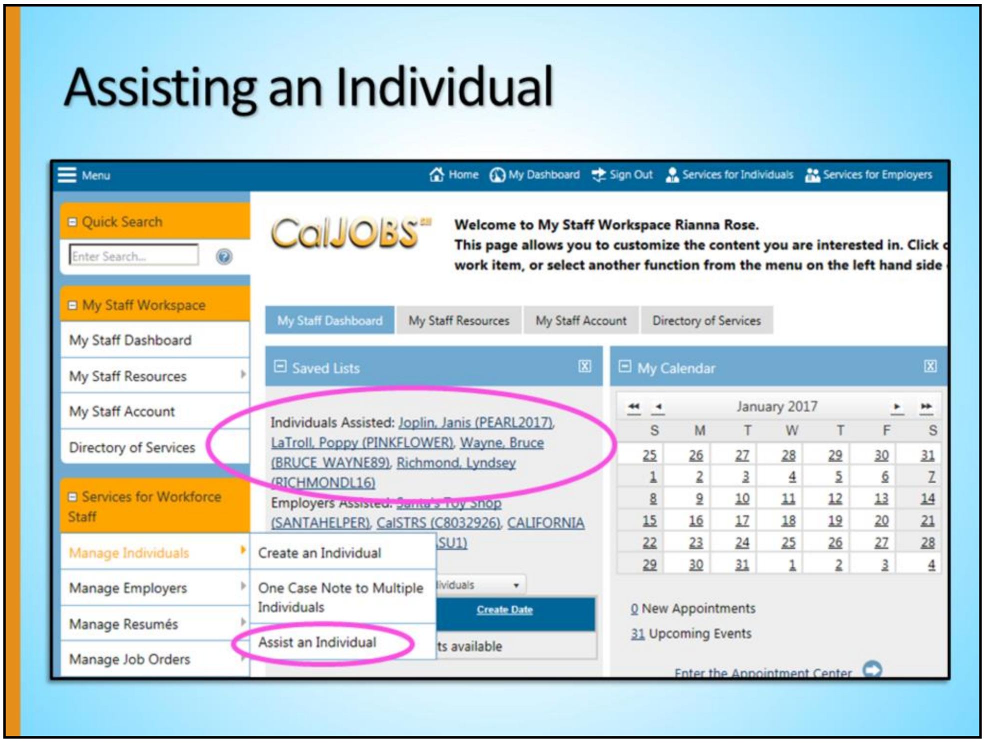
Welcome to CalJOBS Case Management: Participation and Activities.



This module will explain the following:

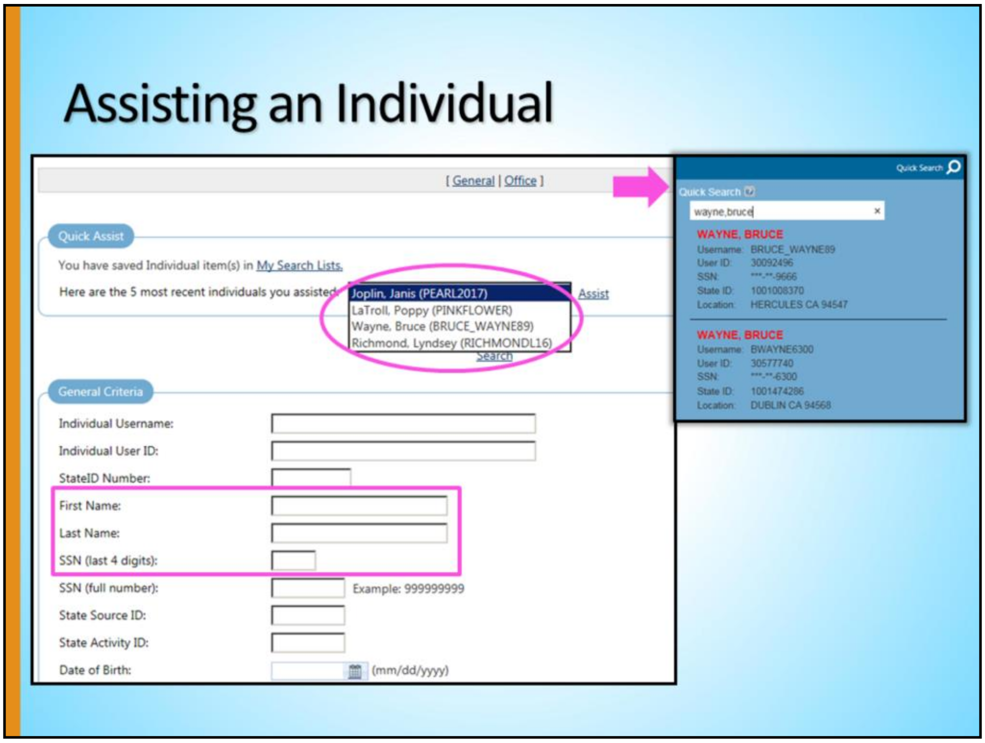
- Creating Participation- Once eligibility is established through the application, create participation to enroll the individual into the program.
- Creating and closing Activities- Create activities to track services provided to the individual, and then close them when you are done providing a services.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

Creating Participation, Activity Codes, and Case Notes



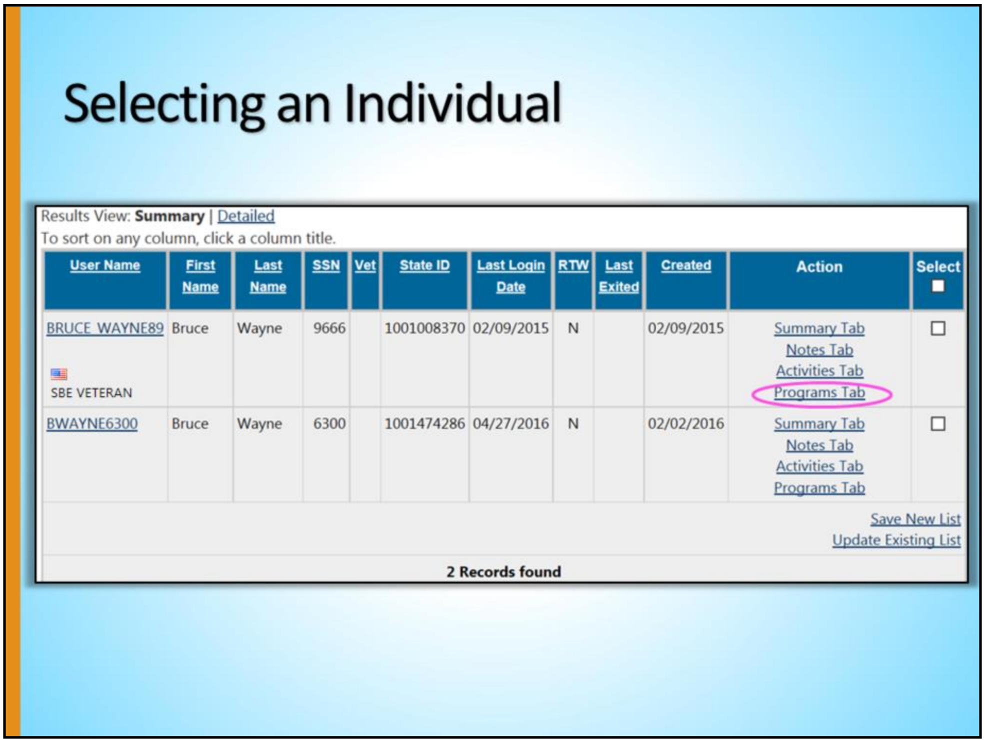
After logging into the system, the first page you will see is **My Staff Dashboard**. On the left navigation menu you will see a gold tab called **Services for Workforce Staff**. In that tab, hover over **Manage Individuals** and select **Assist an Individual** from the flyout menu, as shown in the lower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

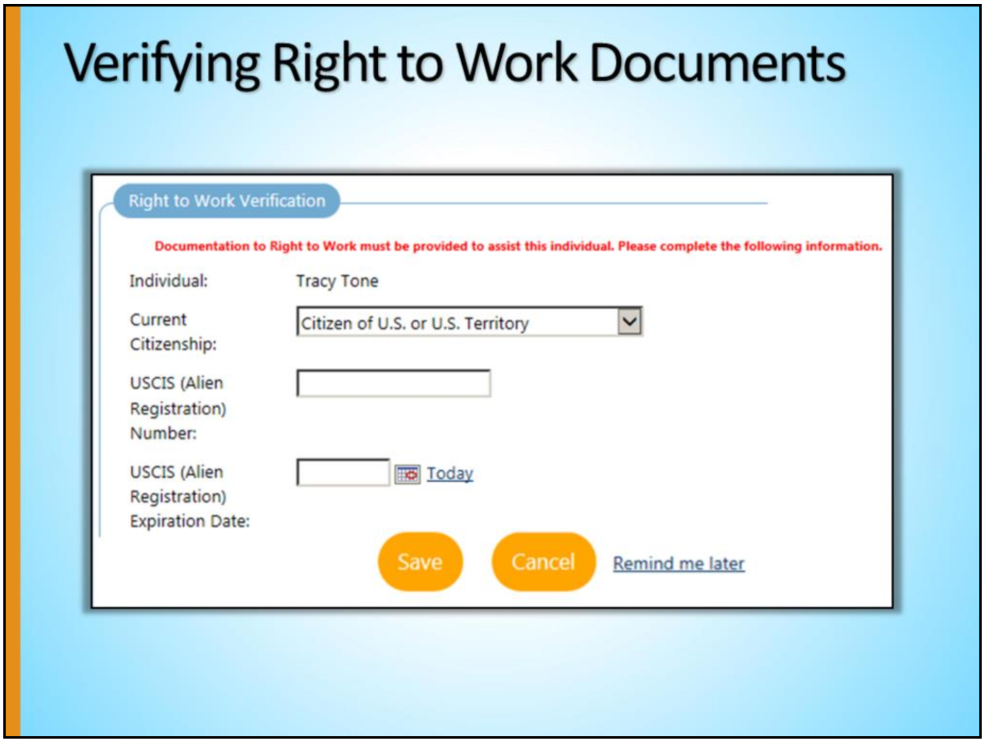


There are different search options including **Quick Assist** and **General Criteria**. Also, there is a **Quick Search** at the top right corner of every page.

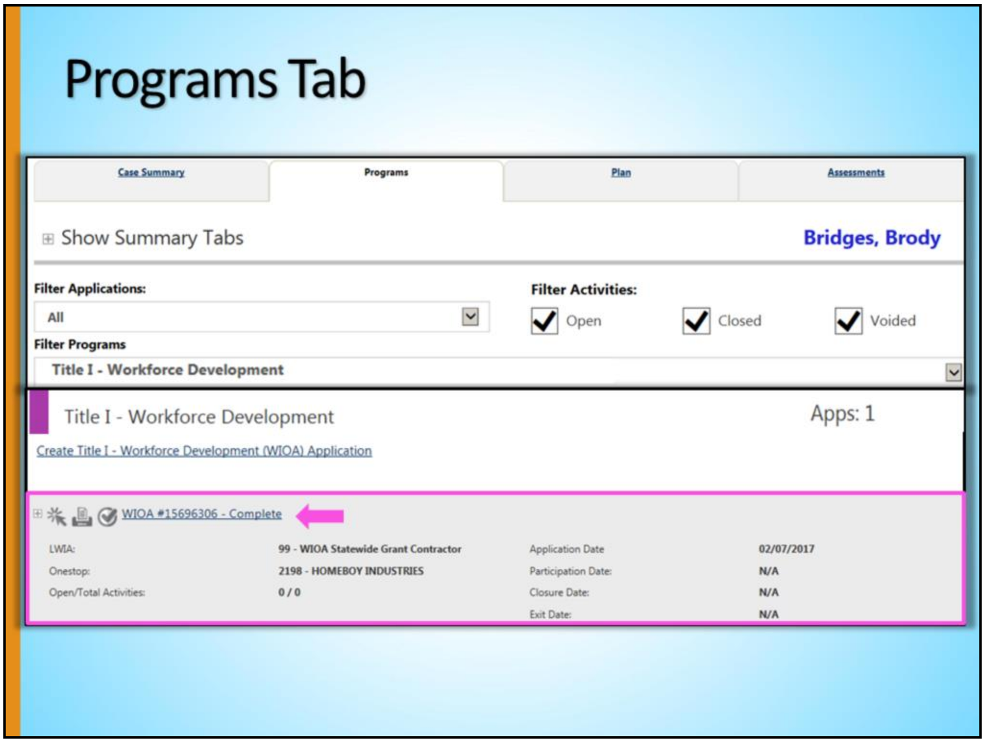
It is recommended to search by full name and the last 4 digits of the individual's Social Security Number. This will help eliminate the likelihood of opening the wrong person's profile.



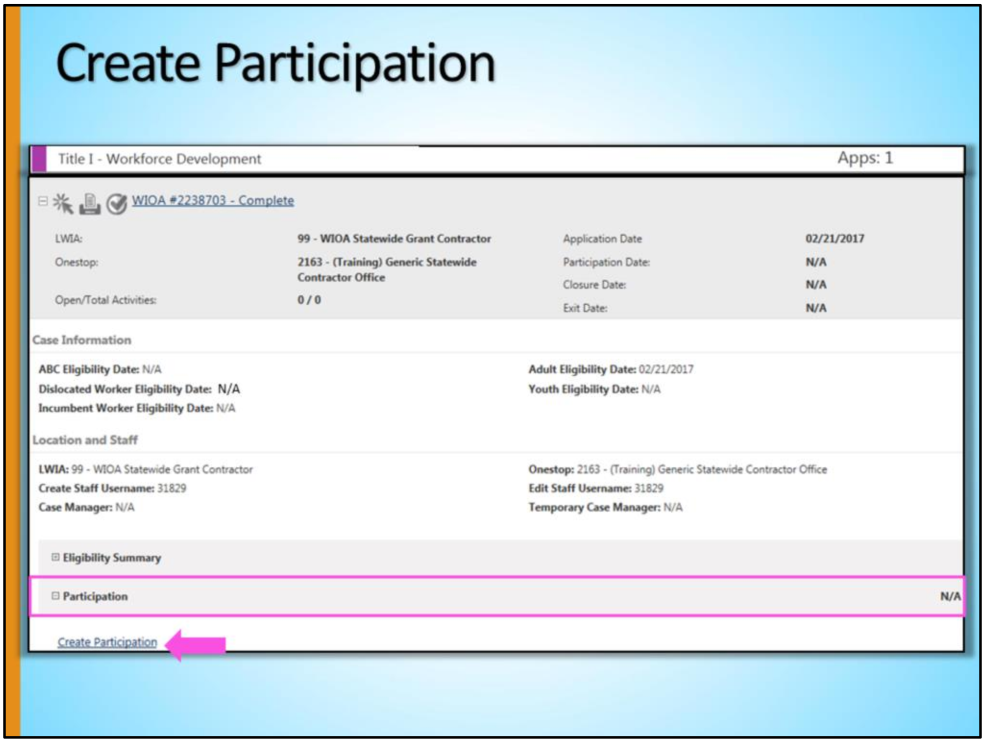
Still, your search results may give you more than one individual user. Find the individual you would like to create a WIOA application for, and select the "Programs Tab" link in the far right Action column.



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



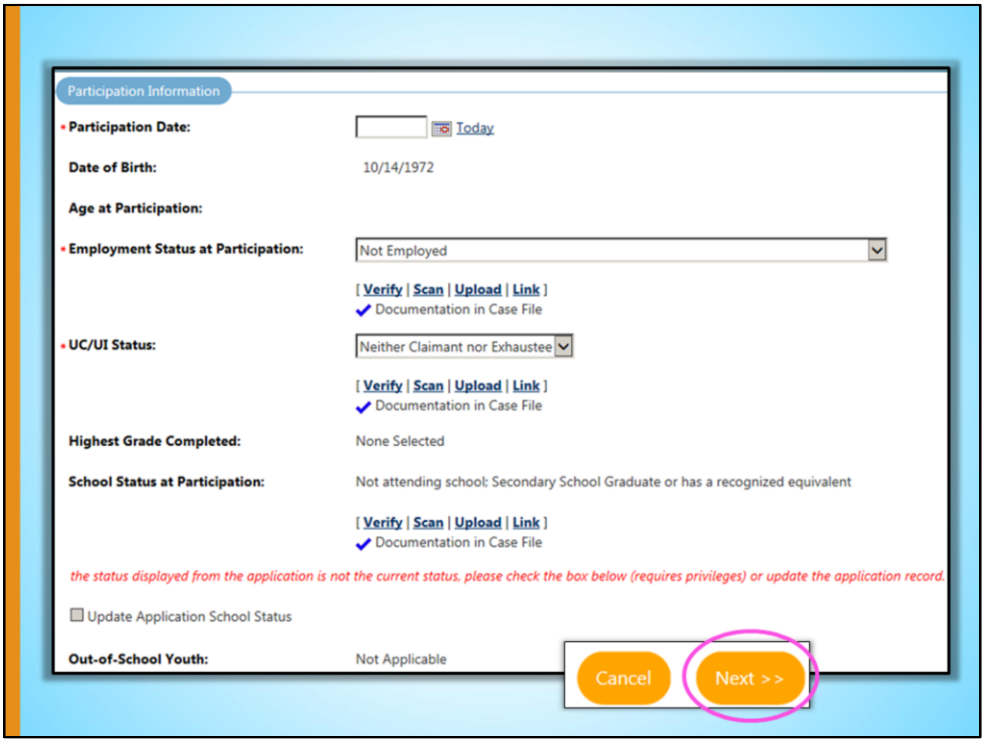
After the Right to Work verification reminder, the Programs tab will appear. Scroll down on this page until you see the previously completed Title I- Workforce Development Application (identified by the arrow). You may click anywhere in the light gray box (outlined in pink) to expand the rest of the Title I application sections.



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.

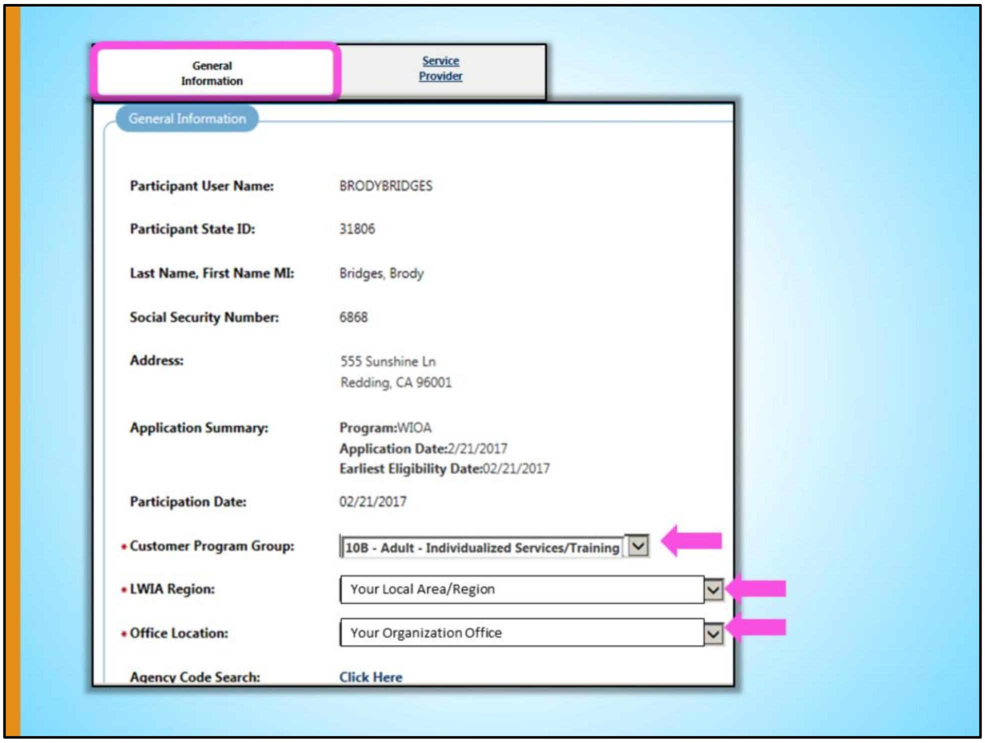
At the top of this page there will be **General Information** regarding this individual and the application.



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.

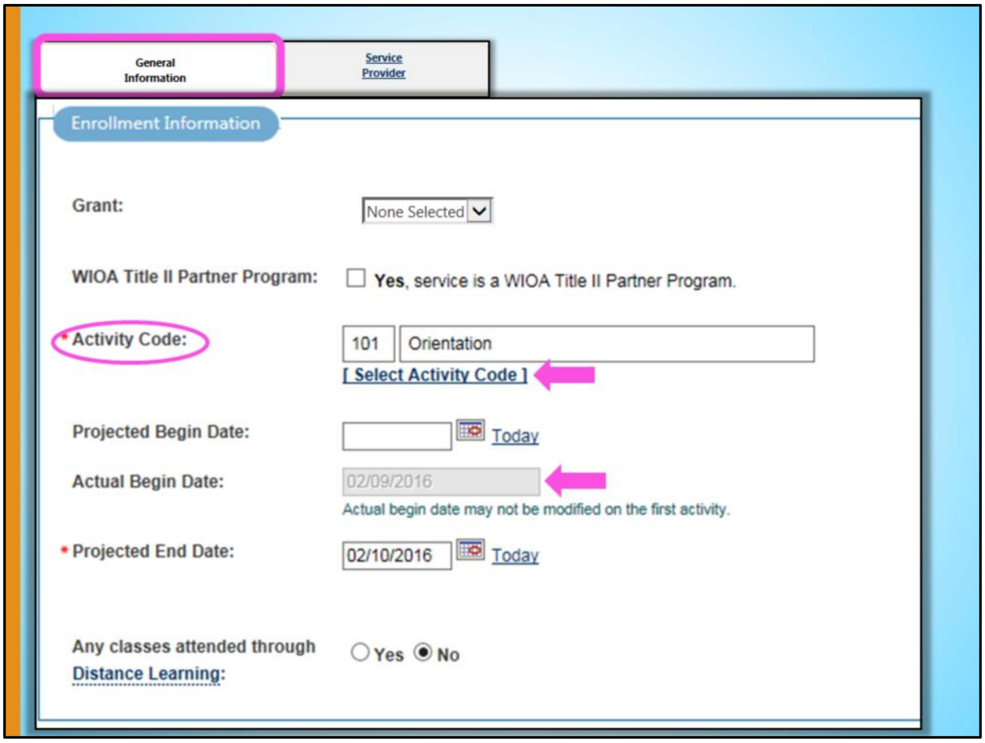
Note: CalJOBS allows you to document data elements, per your local organization business rules, via the "Verify" links. If you choose to use a Verify link, please be sure to have the document in the physical case file or uploaded to CalJOBS. If you do not choose to verify an item, the system will default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



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.

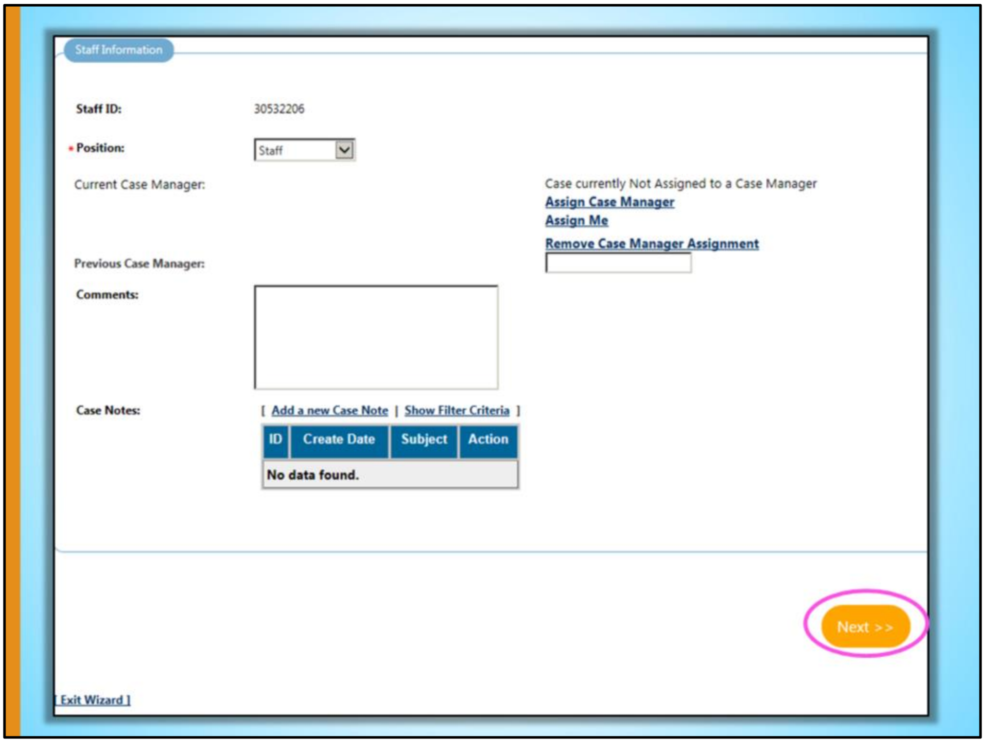


Still within the **General Information** tab, we are now under **Enrollment Information.** If you are serving your individual with a WIOA special grant, select the grant from the **Grant** dropdown. In our example, our individual is not receiving services from a WIOA grant, therefore we are keeping this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

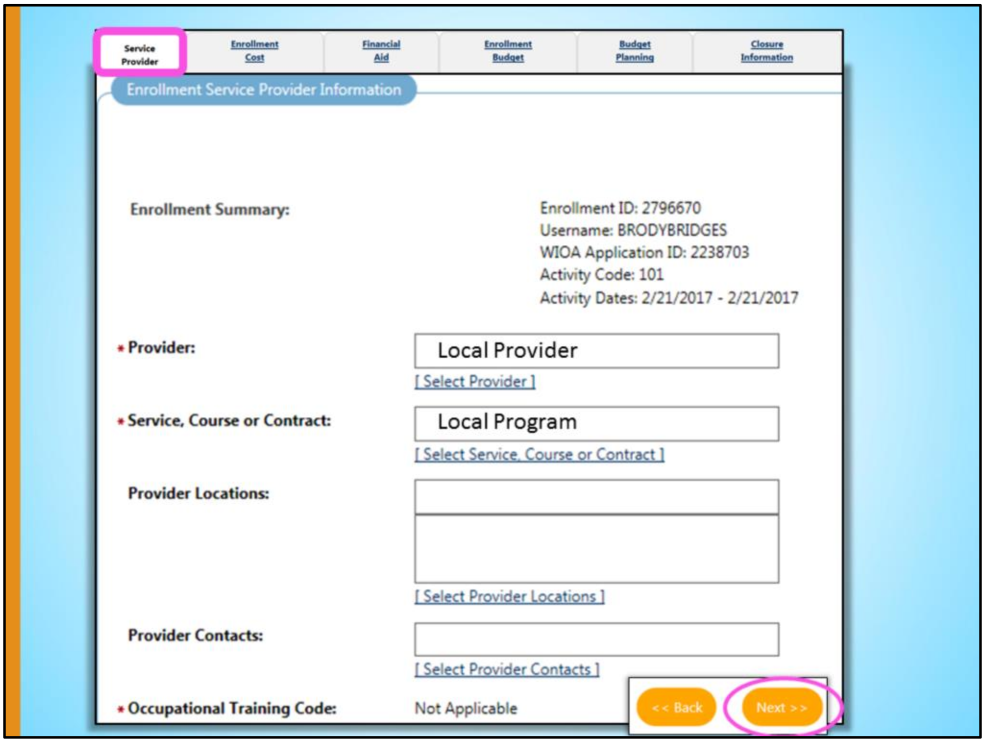
To select an Activity Code, use the link titled "Select Activity Code." This will generate a pop-up box with a list of possible activity codes. Select the appropriate Activity Title and that title will fill in the **Activity Code** box. For training purposes today, we chose "101 Orientation."

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.



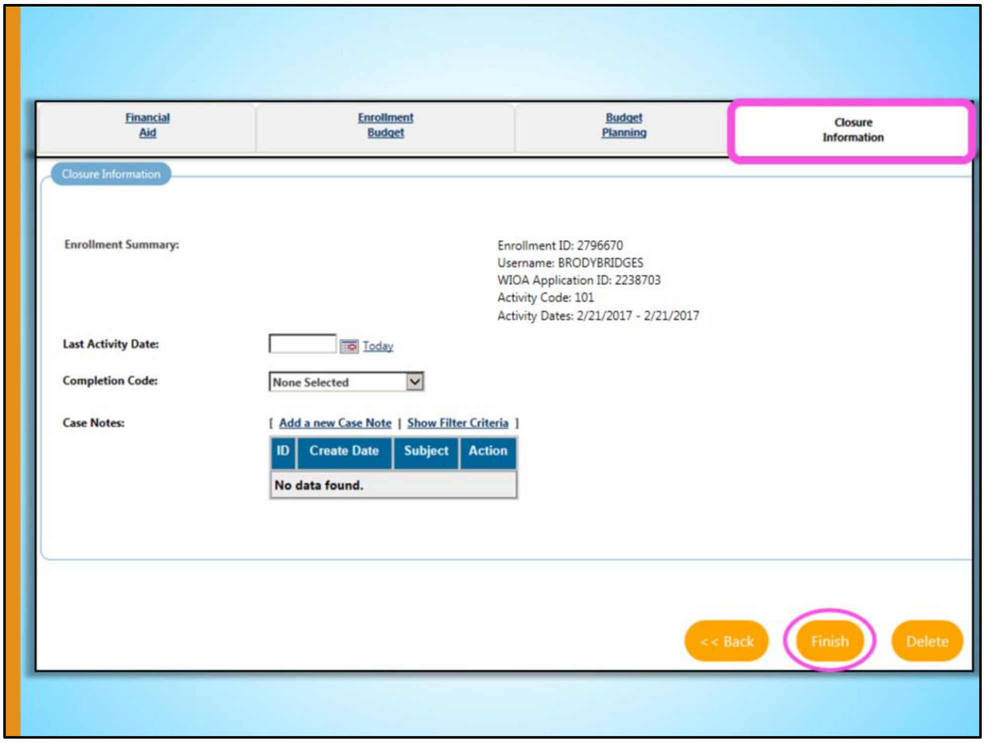
Finally, **Staff Information** is where you can assign a case manager, enter a comment, or create a case note. Be sure to select "Next" to save information and move on.



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.

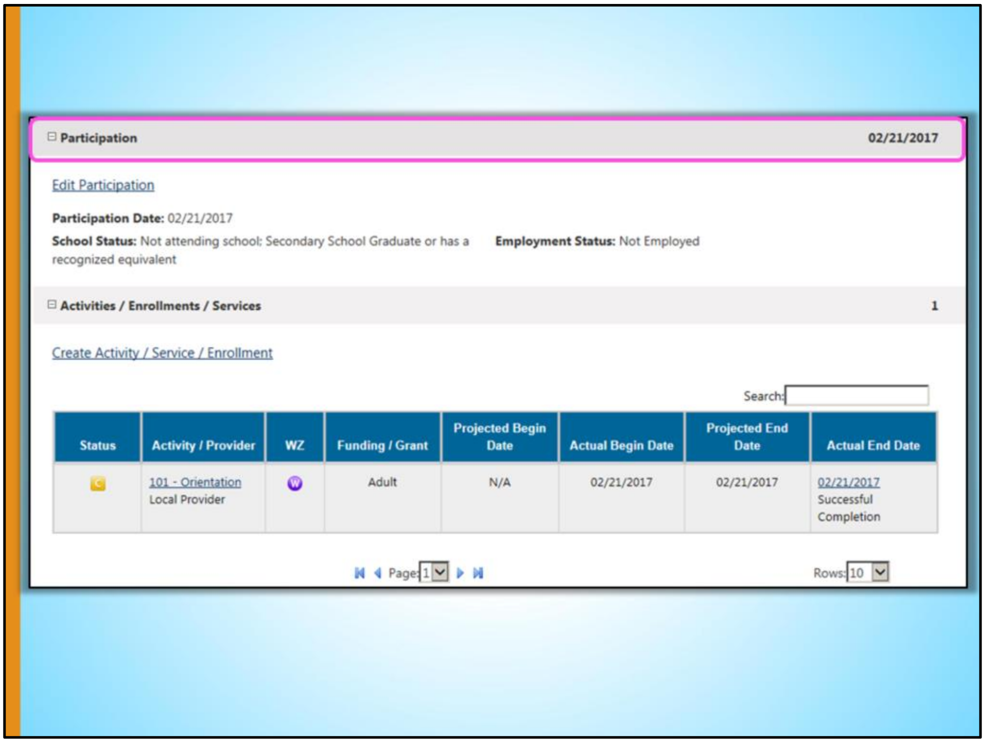
Select the "Next" button to continue.



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**.

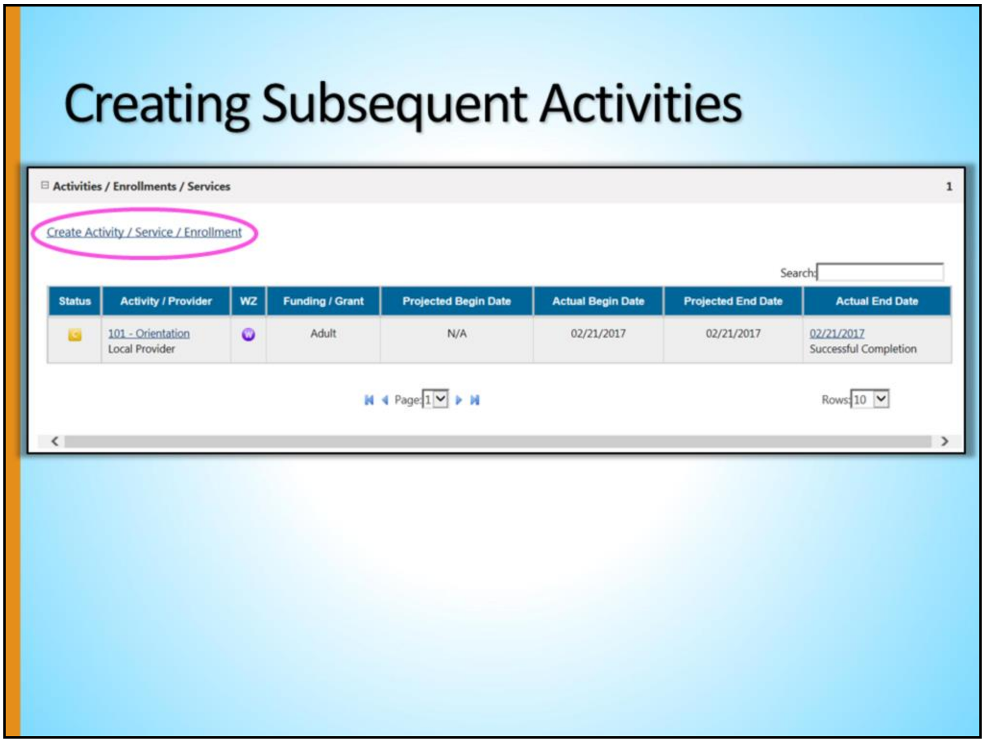
If you do with to close the activity, enter a **Last Activity Date** and then choose the **Completion Code** from the drop down menu. Then, select “Finish”.

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

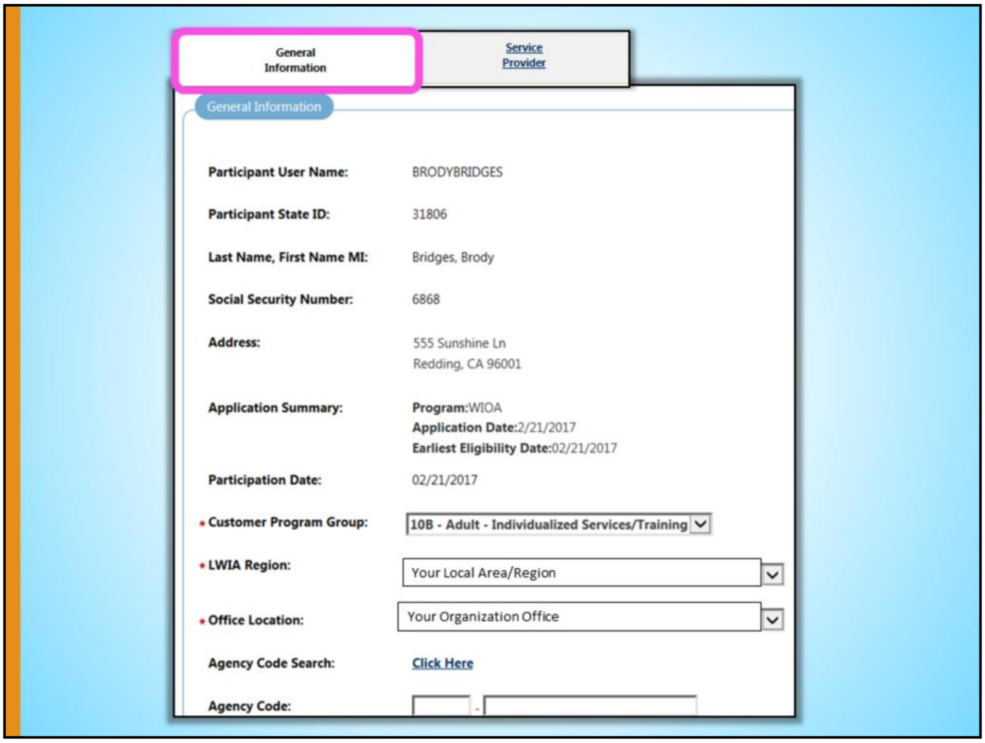


After selecting "Finish", you will see information on the **Participation** ribbon within the Title I Application, along with the "<u>Edit Participation</u>" link.

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



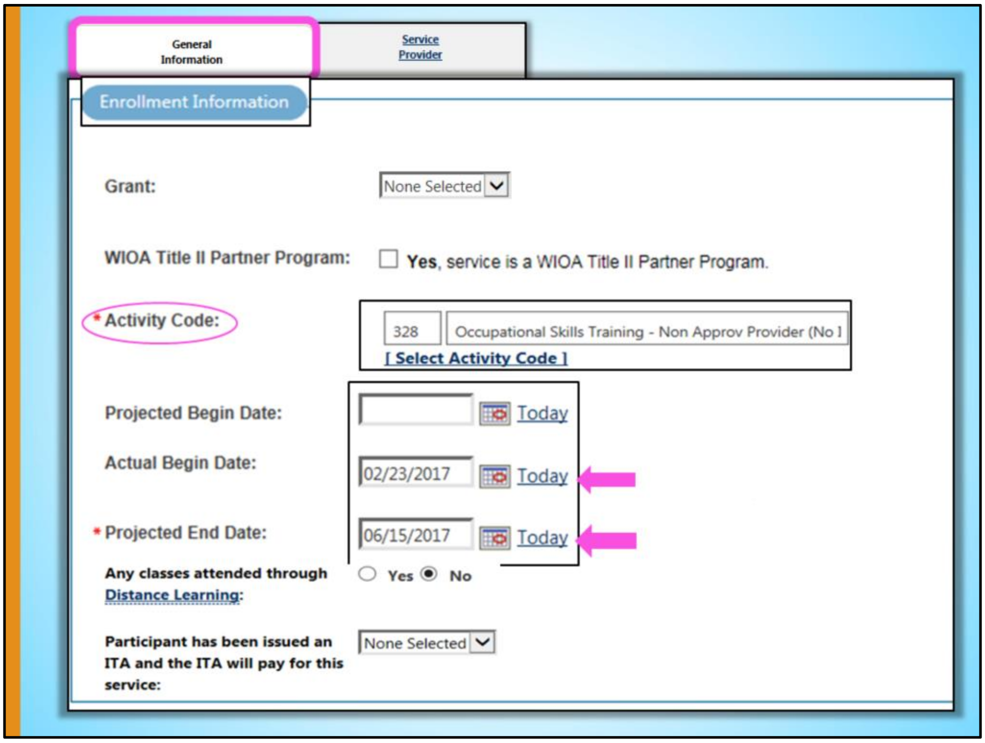
To enter another activity code, choose the "Create Activity/ Service/ Enrollment" link on the **Activities/Enrollments/Services** ribbon.



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.



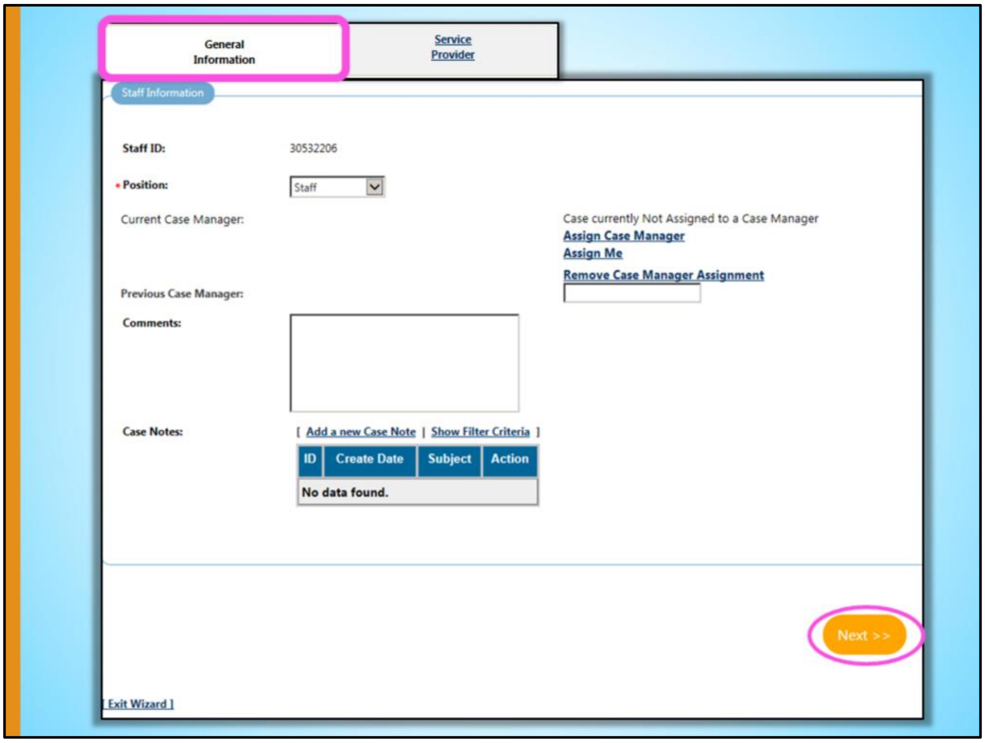
Still within the **General Information** tab, scroll down to **Enrollment Information.**

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.

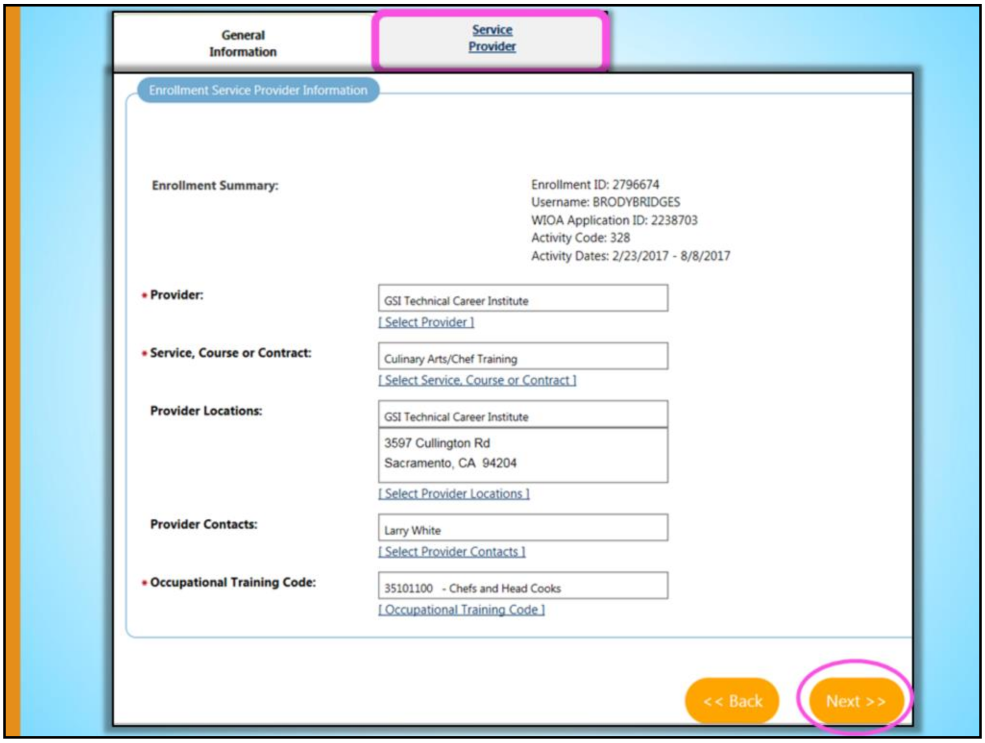
Next, enter an **Actual Begin Date**. You may choose the "Today" link to populate today's date, click on the picture of a calendar to populate a calendar for which to choose the date, or manually enter the date into the box.

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**.



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.



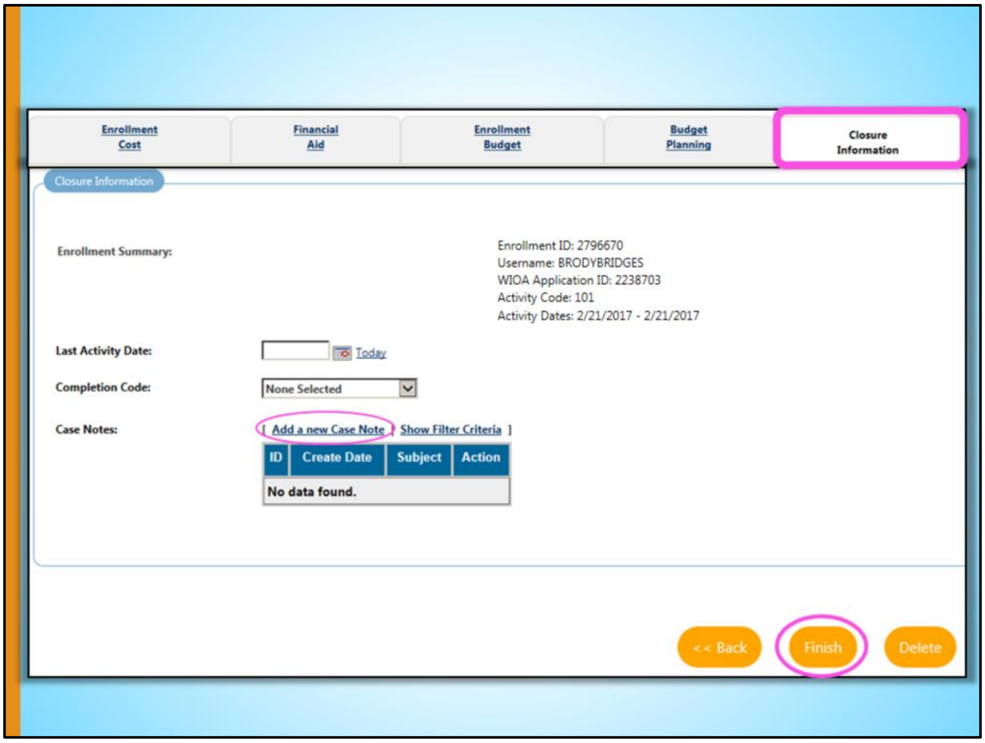
Next, on the **Service Provider** tab, you must complete the **Enrollment Service Provider Information**. If you are completing a training activity code, such as in our example, you must select the provider who will provide the training by selecting the "Select Provider" link. This will generate a pop-up 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".

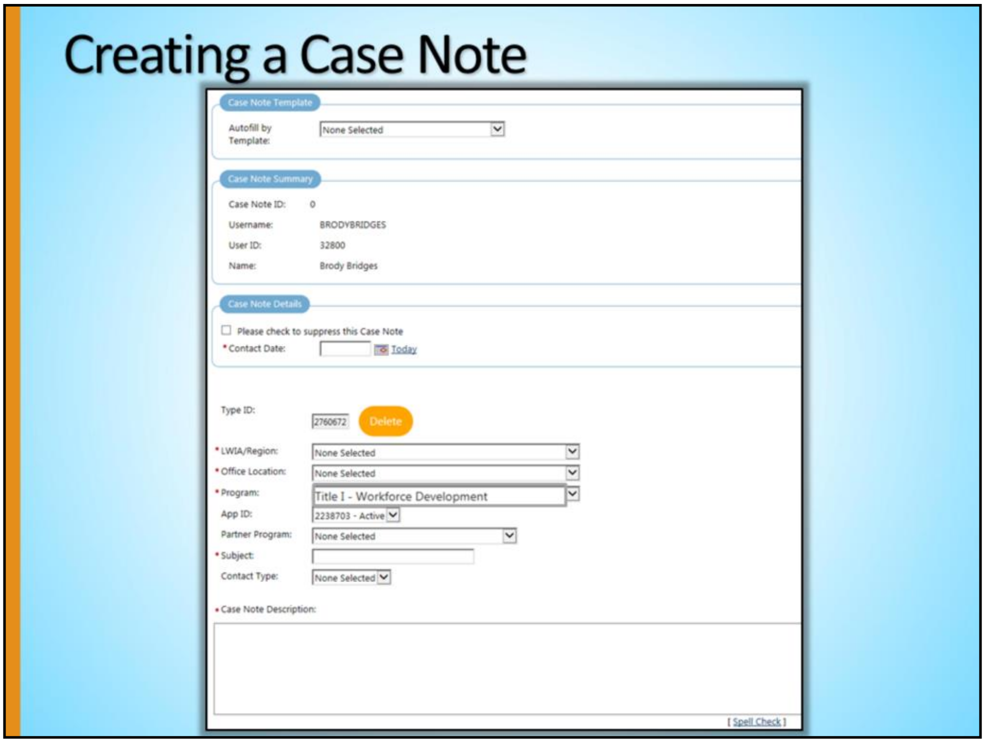


If you are creating a training activity code, you will be brought to the **Enrollment Cost** tab after selecting “Next” on the previous slide. For our training purposes we will not review the **Enrollment Cost, Financial Aid, Enrollment Budget, or Budget Planning** tabs.

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.



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.

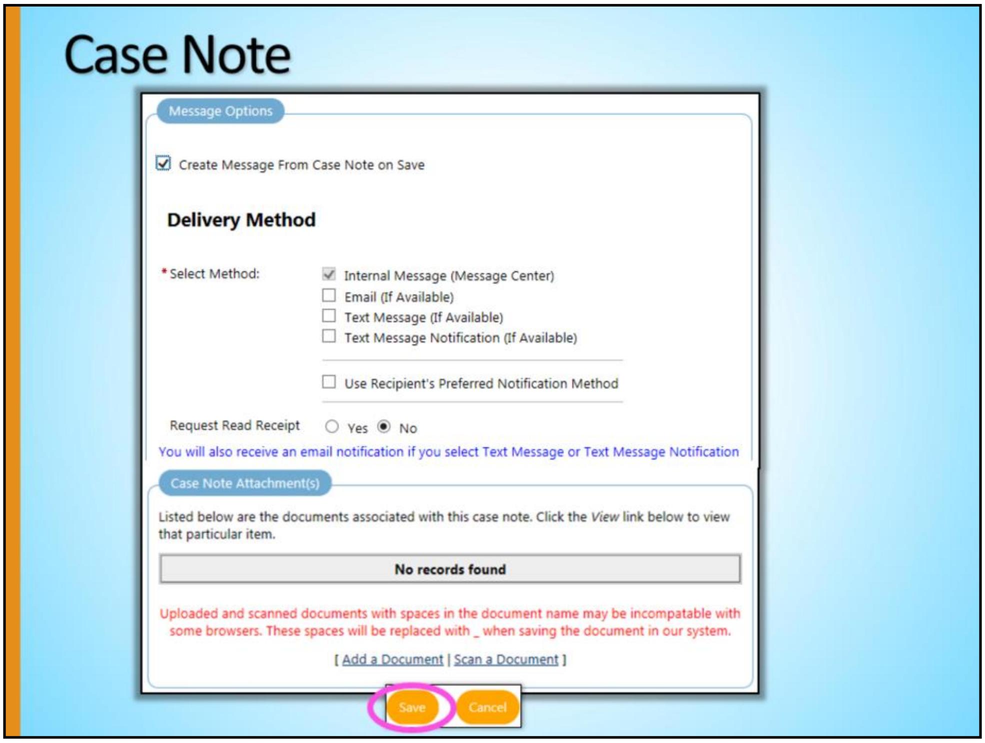
The **Case Note Details** section must be completed. Enter the **Contact Date** and whether or not you want to suppress the Case Note. A suppressed Case Note means that the note will not be visible to others, just you.

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**.

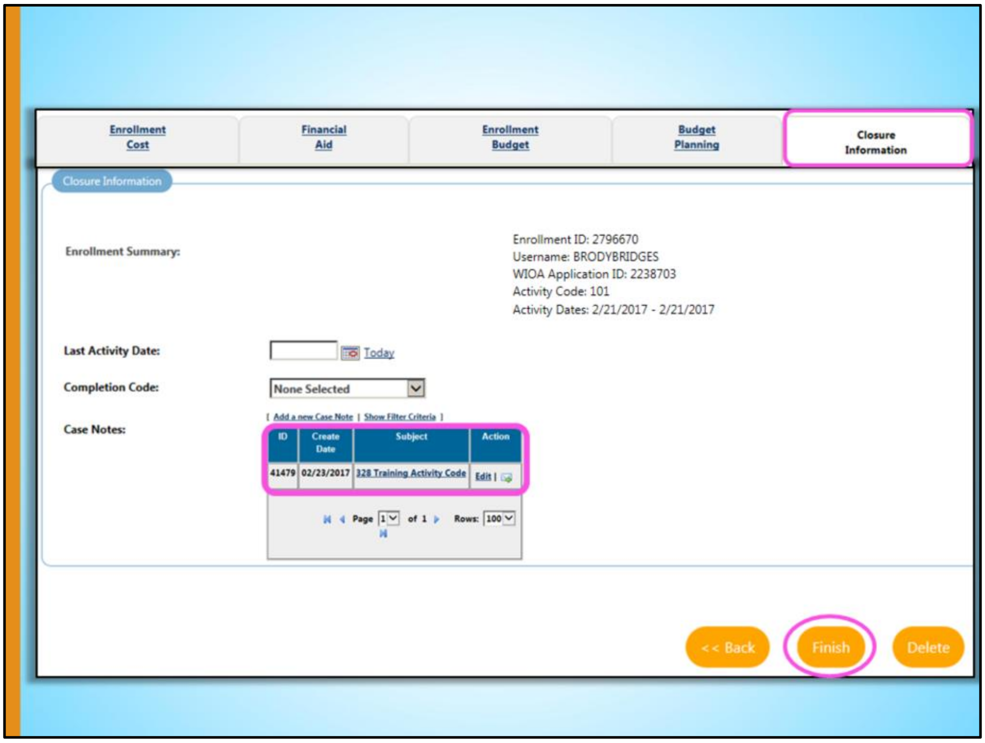
Note: It may be very beneficial for you to use a consistent naming convention for the subject of your case notes. For example, writing the number of the activity code the case note corresponds to (in our example, 328).This will be very helpful when running a case note report.



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.

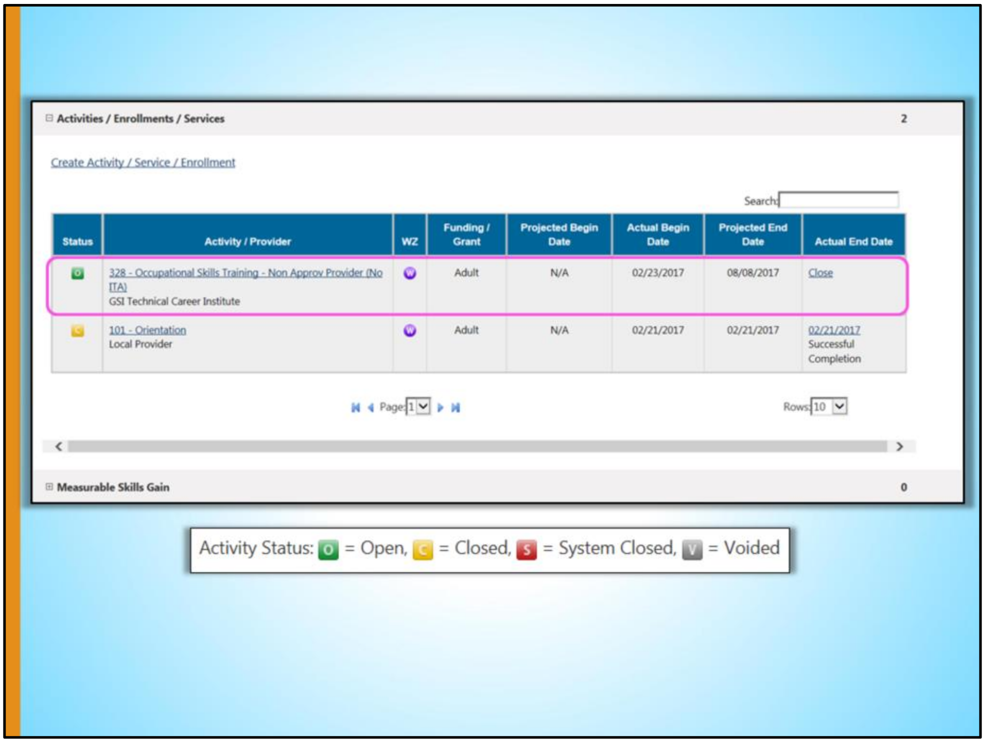
The system will allow you to scan or upload a document to be associated with this note if you need to do so. This may be done by selecting either the "<u>Add a Document</u>" or "<u>Scan a Document</u>" link.

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



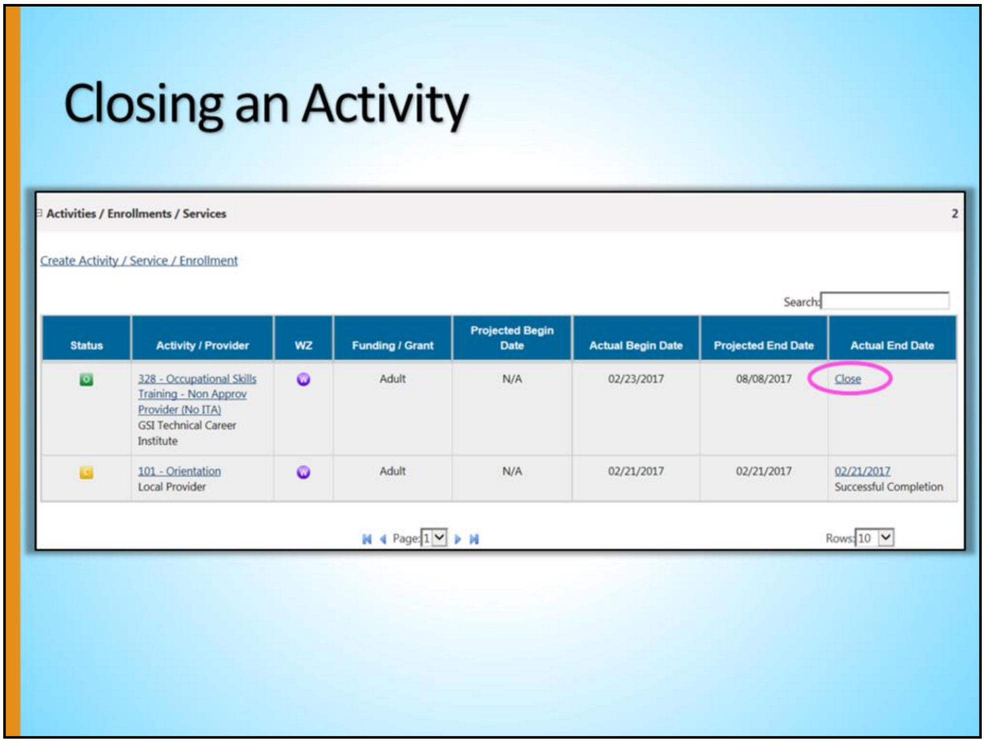
Note the added Case Note in the **Case Notes** table.

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

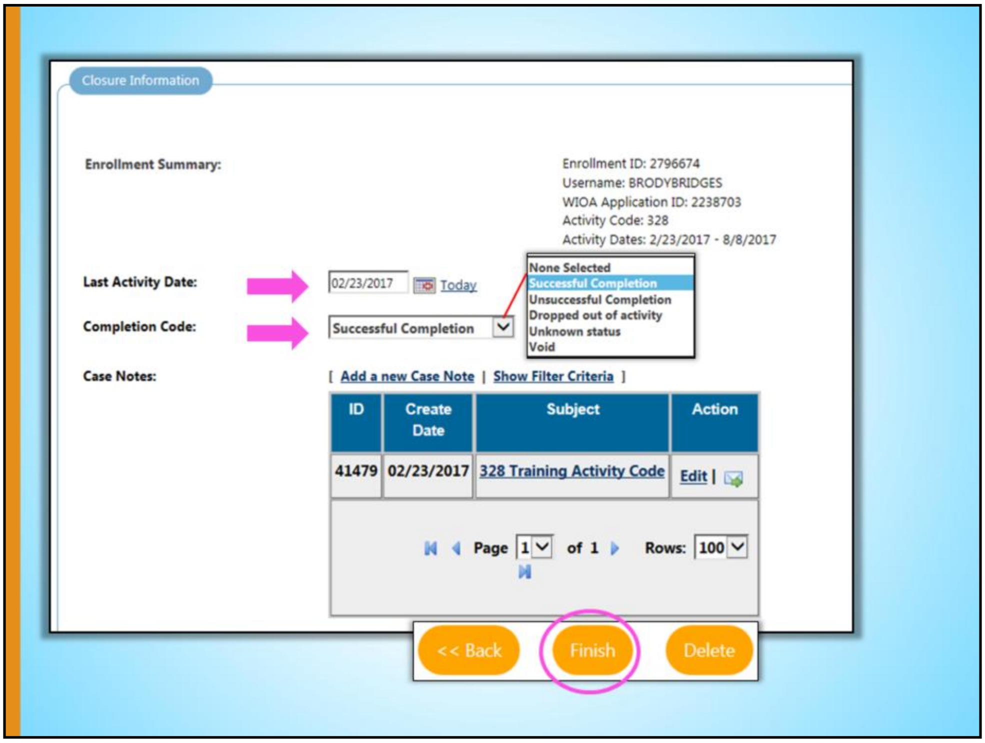


You will find the added activity on the activity table in your **Activities/Enrollments/Services** ribbon.

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.



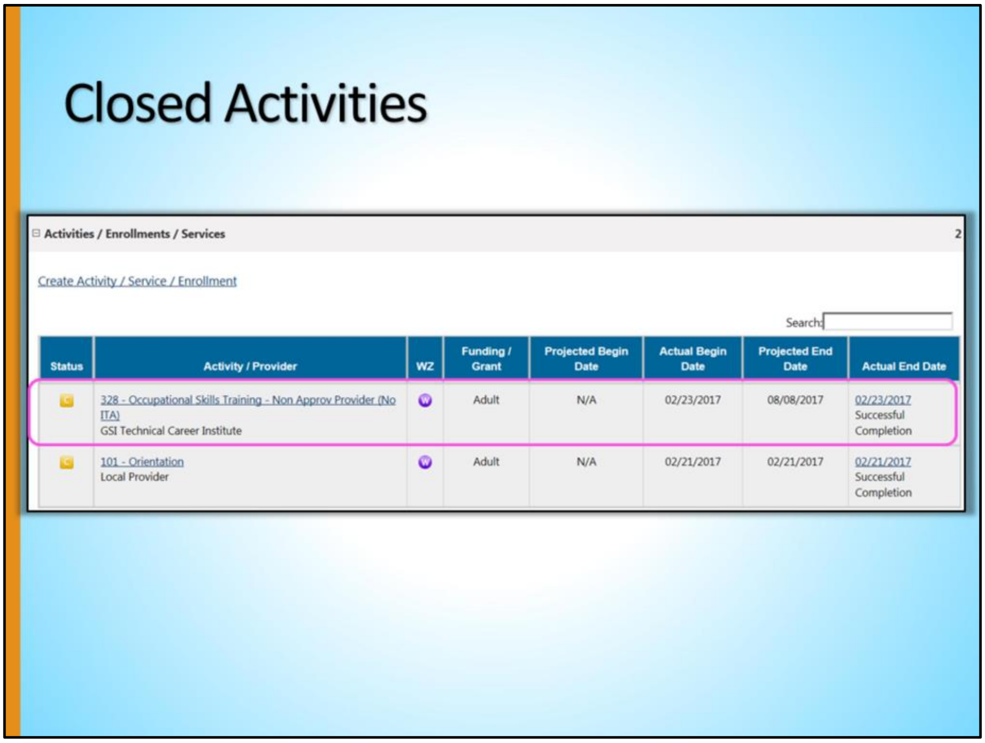
To indicate that you have completed providing a service to an individual, you will close that particular activity. To close an activity, expand the **Activities/Enrollments/Services** ribbon. This will bring you to your activity table. Select the "Close" link in the far right column for the activity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



Select the **Last Activity Date**.

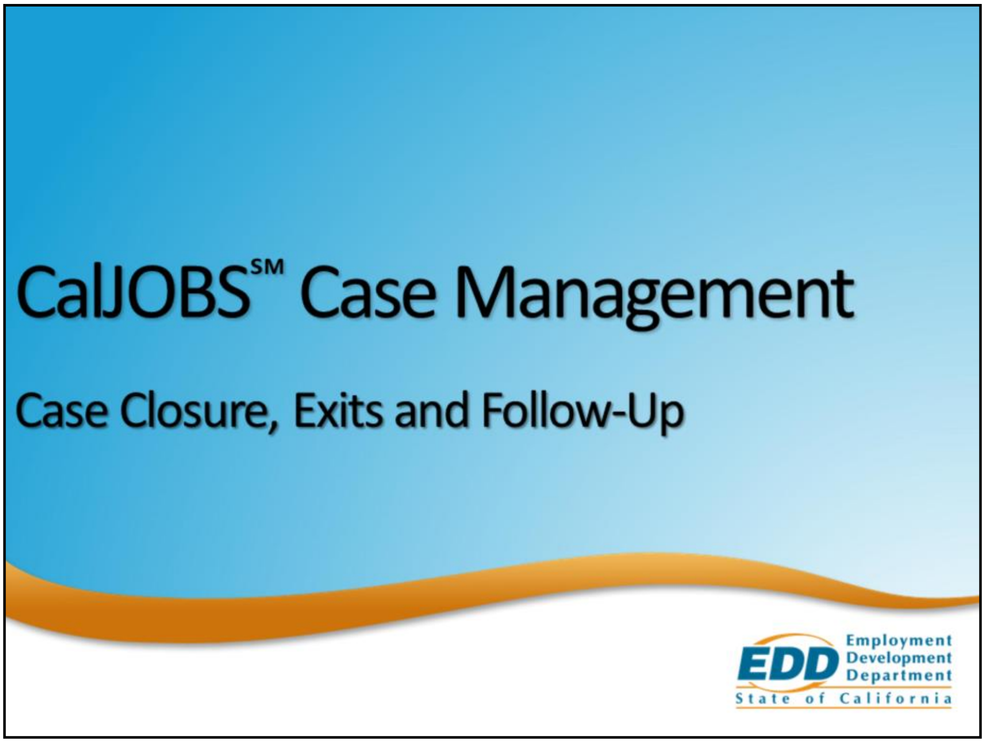
Select **Completion Code** from the dropdown menu. Your options for completion are shown in this slide.

Select the “Finish” button.



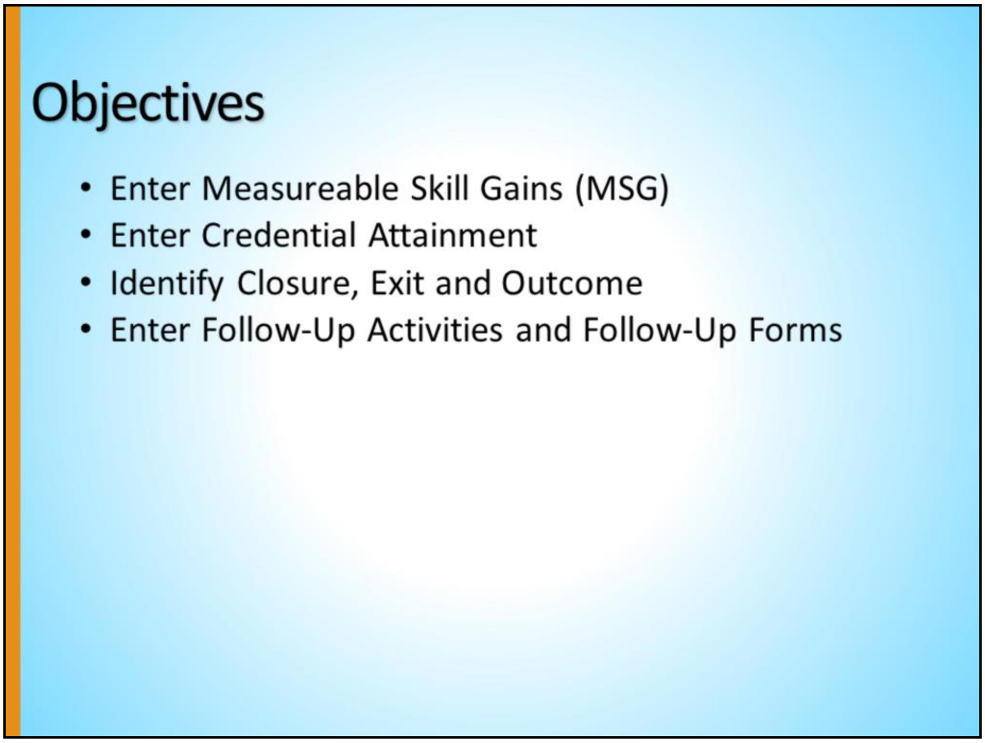
Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
C	328 - Occupational Skills Training - Non Approv Provider (No ITA) GSI Technical Career Institute	W	Adult	N/A	02/23/2017	08/08/2017	02/23/2017 Successful Completion
C	101 - Orientation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



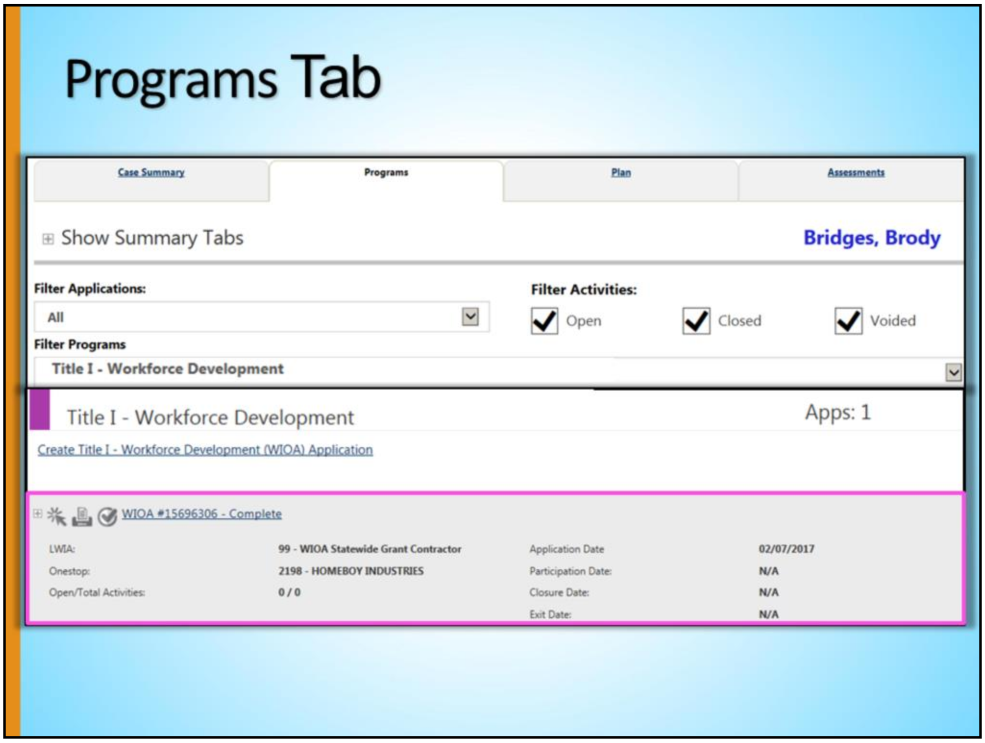
Welcome to CalJOBS Case Management: Case Closure, Exits, and Follow-Up.

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.



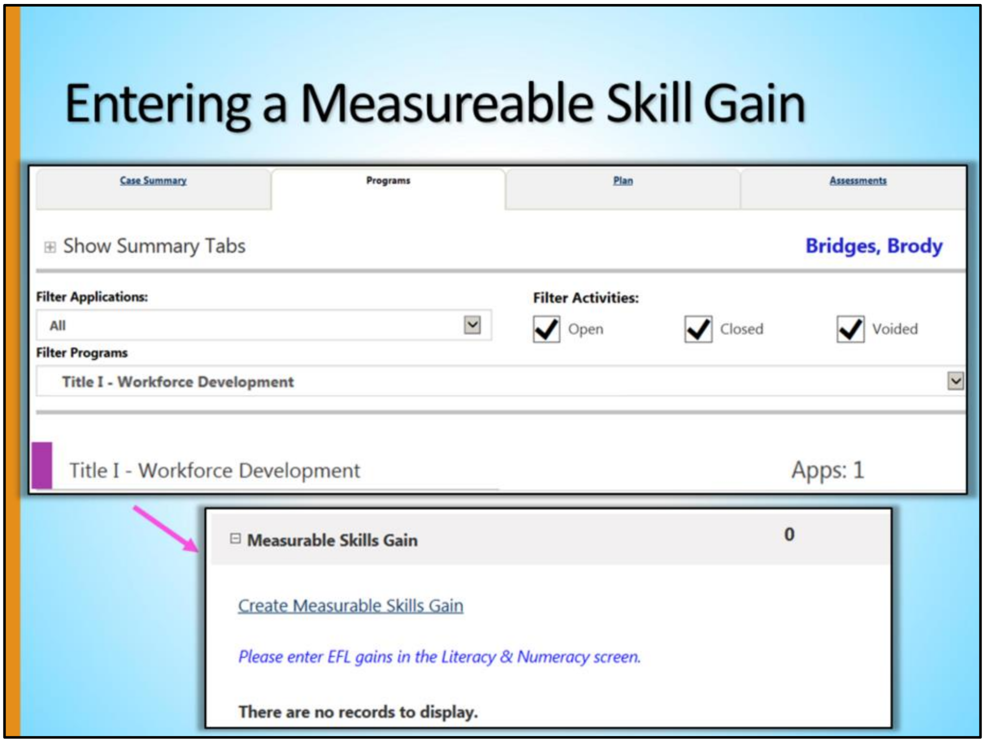
At the conclusion of this training, you should be able to:

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



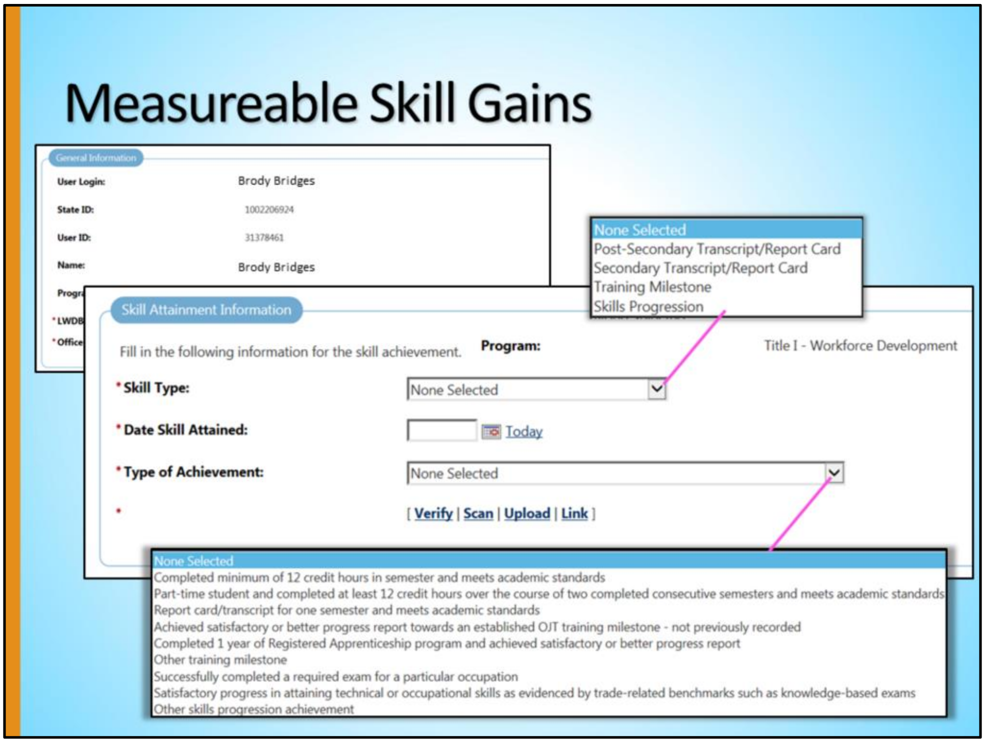
From the **Programs** tab, click anywhere in the light gray box (outlined in pink) to expand the rest of the Title I program application sections.

Measureable Skill Gains (MSG) in CalJOBS



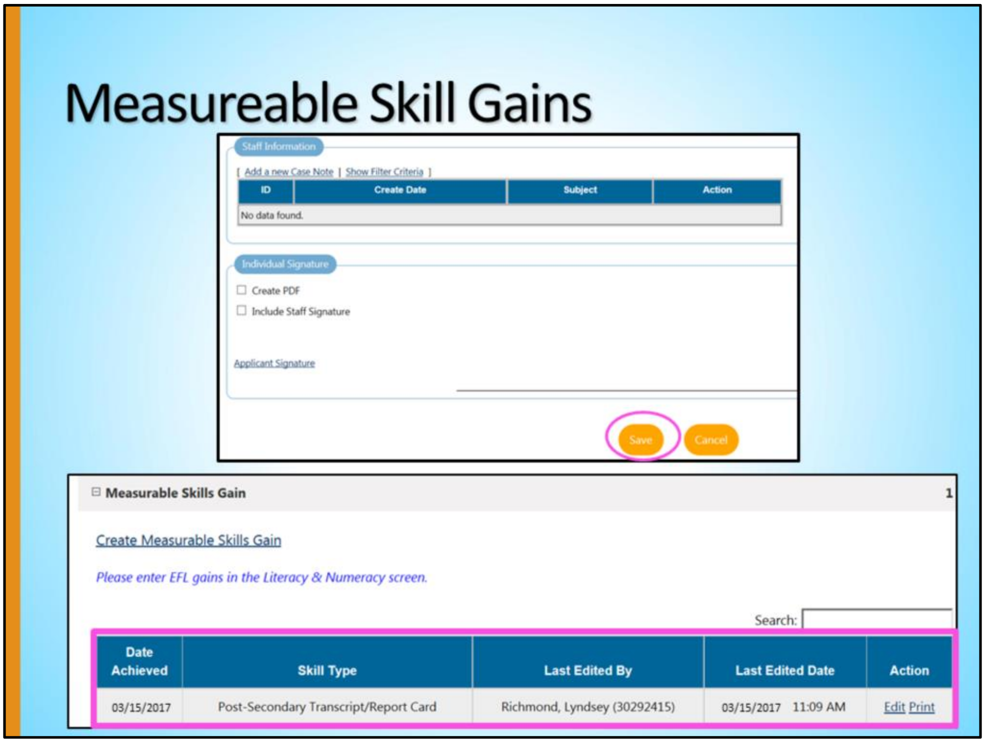
To enter a measureable skill gain into CalJOBS, navigate to the **Measureable Skill Gains** ribbon of the individual's Title I program application, then select the Create Measureable Skill Gain link.

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



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.

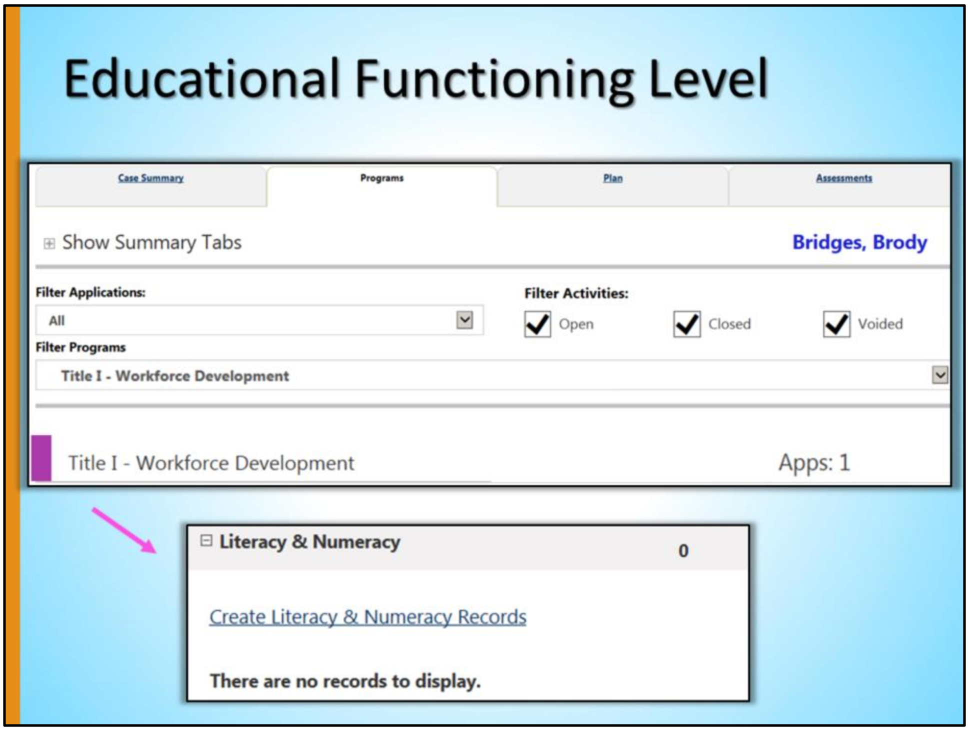
In the **Skill Attainment Information** section, enter information for the skill achievement. The **Program** field is pre-filled with information entered in the program application. Select the appropriate skill type from the **Skill Type** drop-down, and then enter the date the individual attained the 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.



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

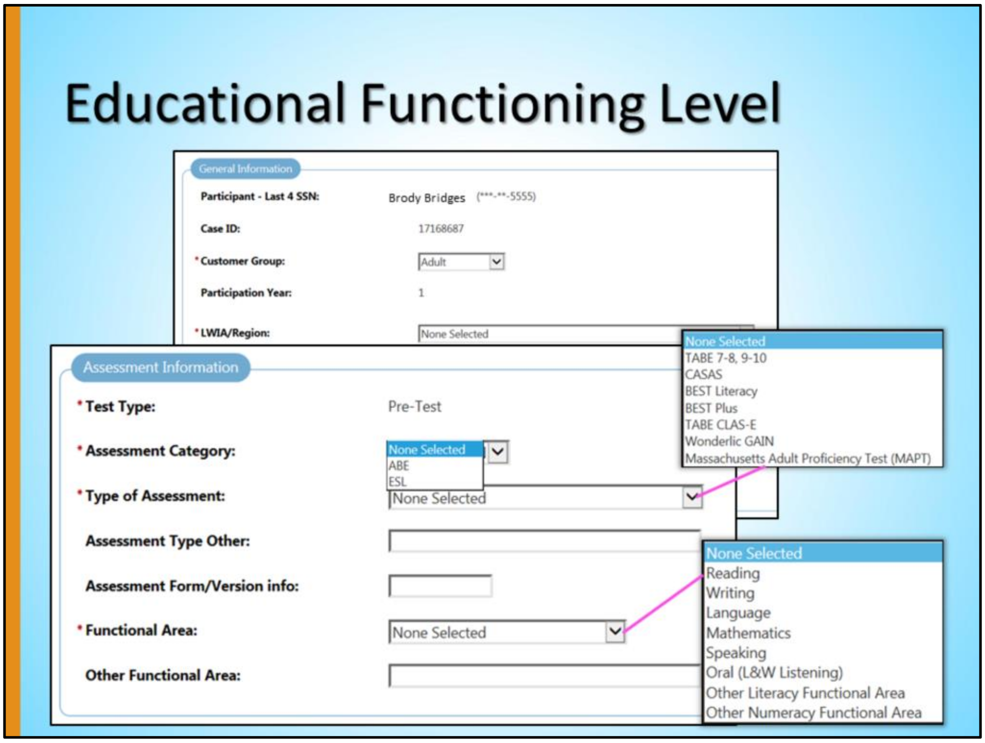
The information entered will now populate on a table within the **Measureable Skill Gains** ribbon.

Educational Functioning Level (EFL)



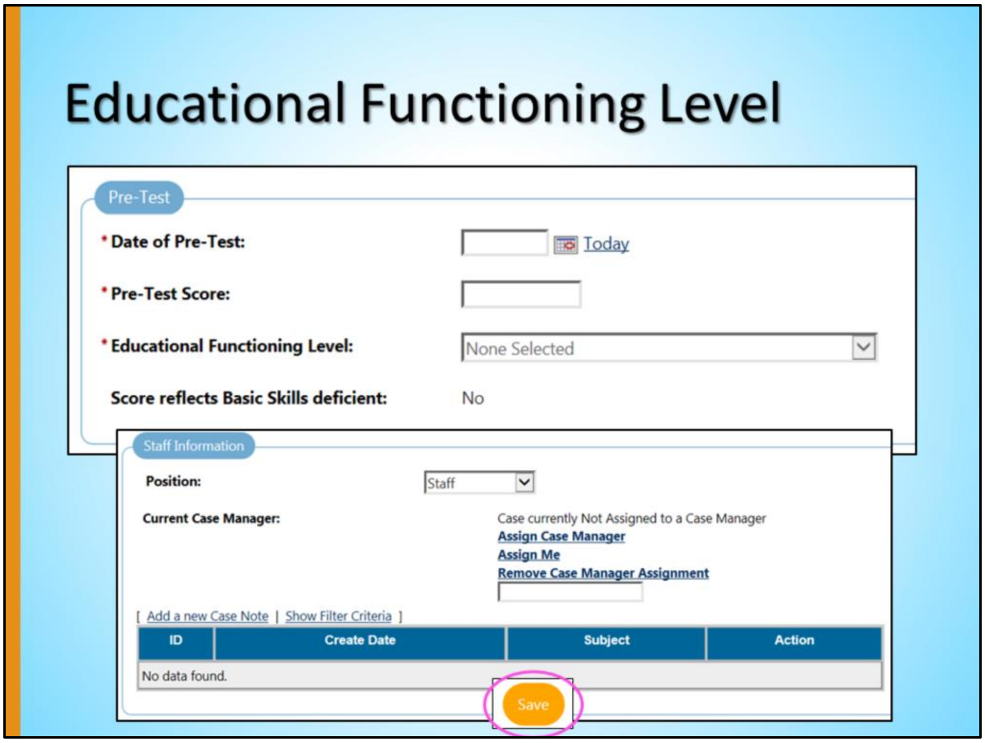
CalJOBS provides a data collection method to record pre-test data, and allows entry of multiple progress assessments for each participation year that allows staff to flag the progress assessment as the participation year's posttest, for federal reporting purposes.

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.



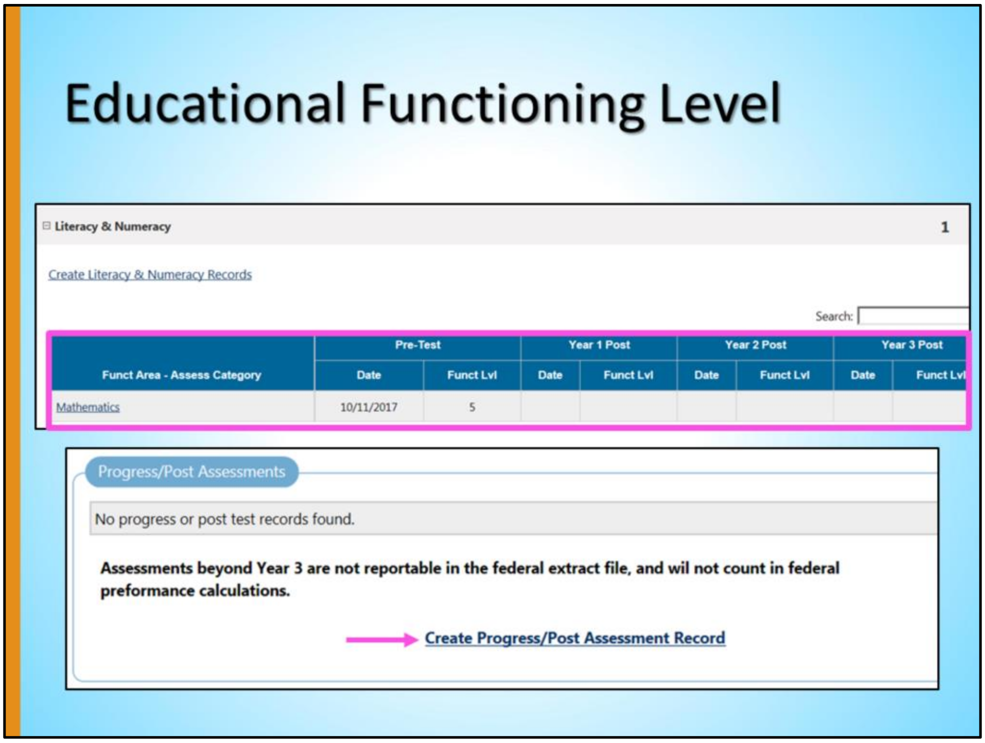
The first section of the Literacy & Numeracy screen is the **General Information** section. This section has many pre-filled fields, just be sure that those that are required are answered correctly.

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.



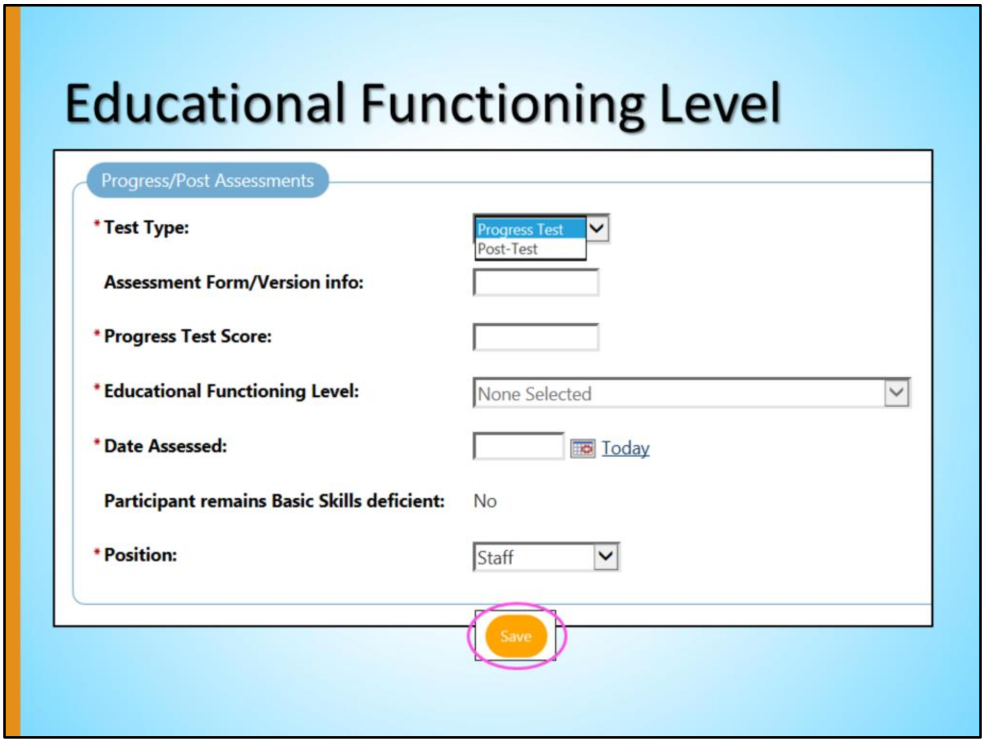
Next, complete the fields in the **Pre-Test** section. First, enter the date of the pre-test in the **Date of Pre-Test** field, then enter the score the individual recieved in the **Pre-Test Score** field. The entered score will determine the value that the system assigns to the **Educational Functioning 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.



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.

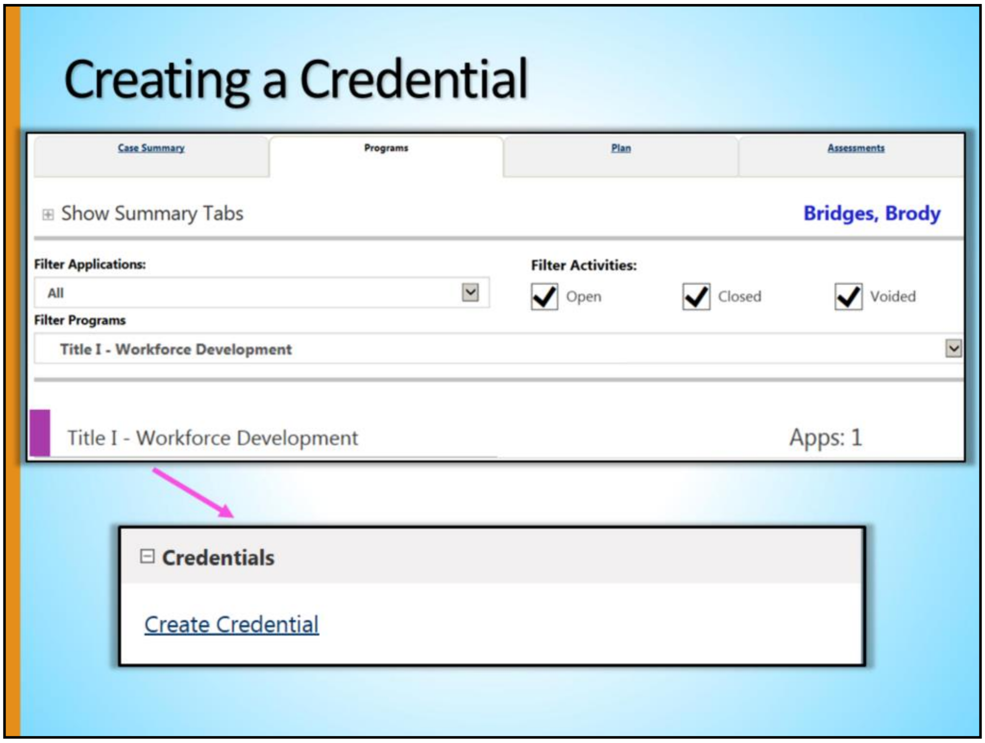


Within the Progress/Post Assessments section, first select the type of post-test that the individual was given from the **Test Type** drop-down menu.

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.

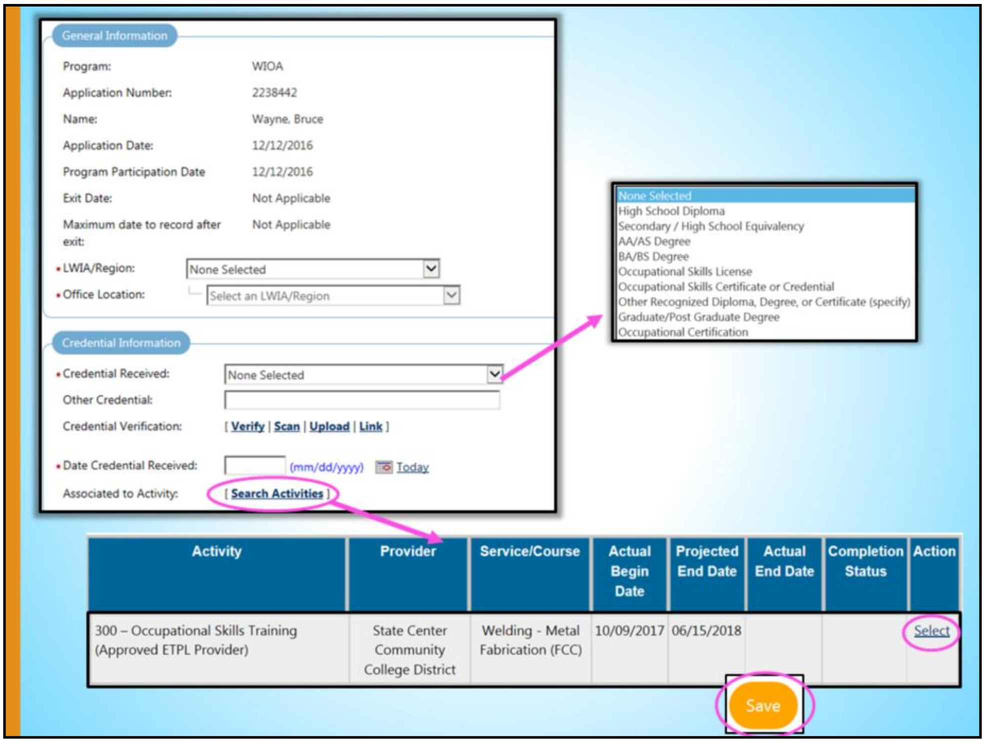
Finally, select the "Save" button to save your information.

Credential Attainment in CalJOBS



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

Click the "<u>Create Credentials</u>" link.



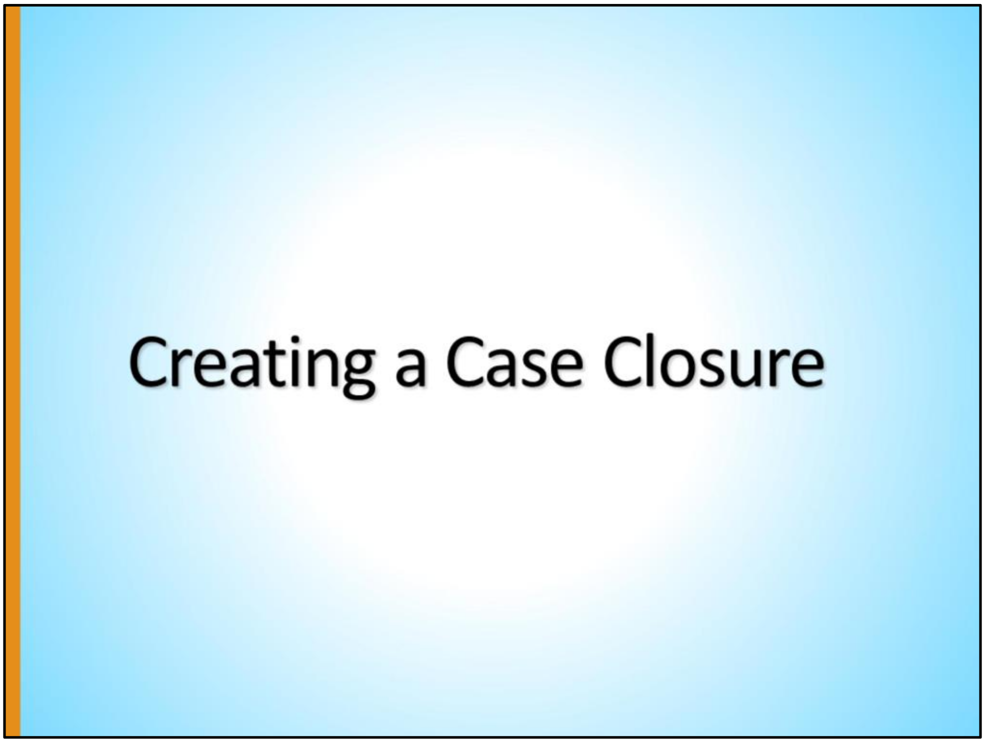
Under the **General Information** section, choose your LWIA/Region, then choose your organization from the **Office Location** drop down menu.

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.

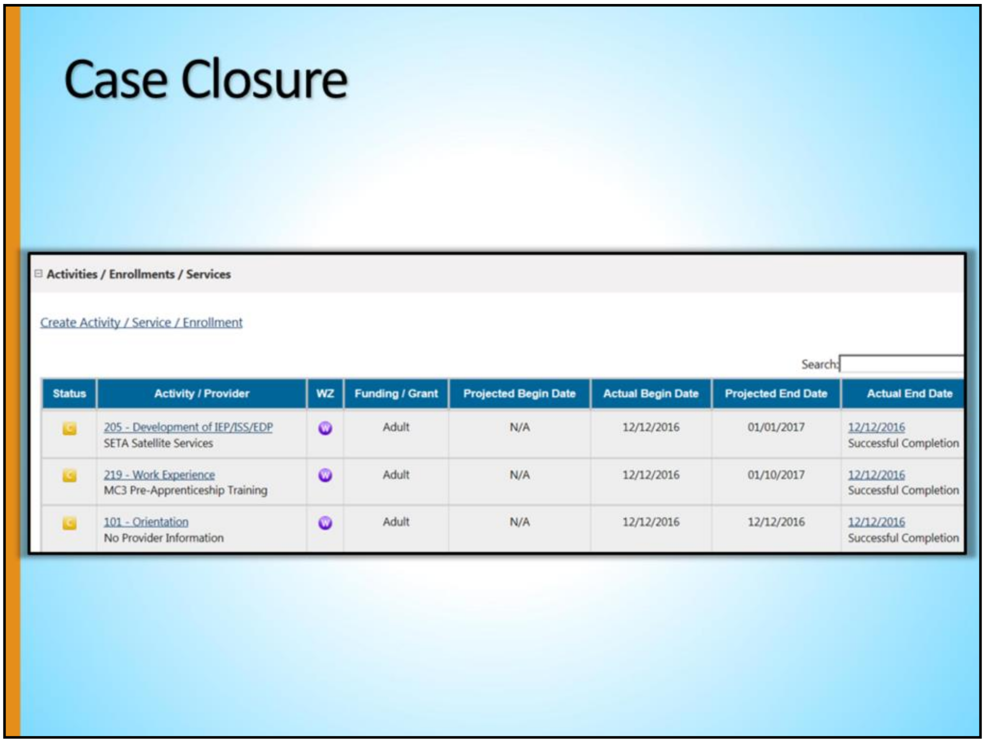
Next, complete the **Date Credential Received** field. Finally, although not marked with a red asterisk, it is required that you select the Search Activities link from the **Associated to Activity** field to associate an activity to this credential attainment. Click the Select link from the "Action"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

To finish, select the "Save" button.

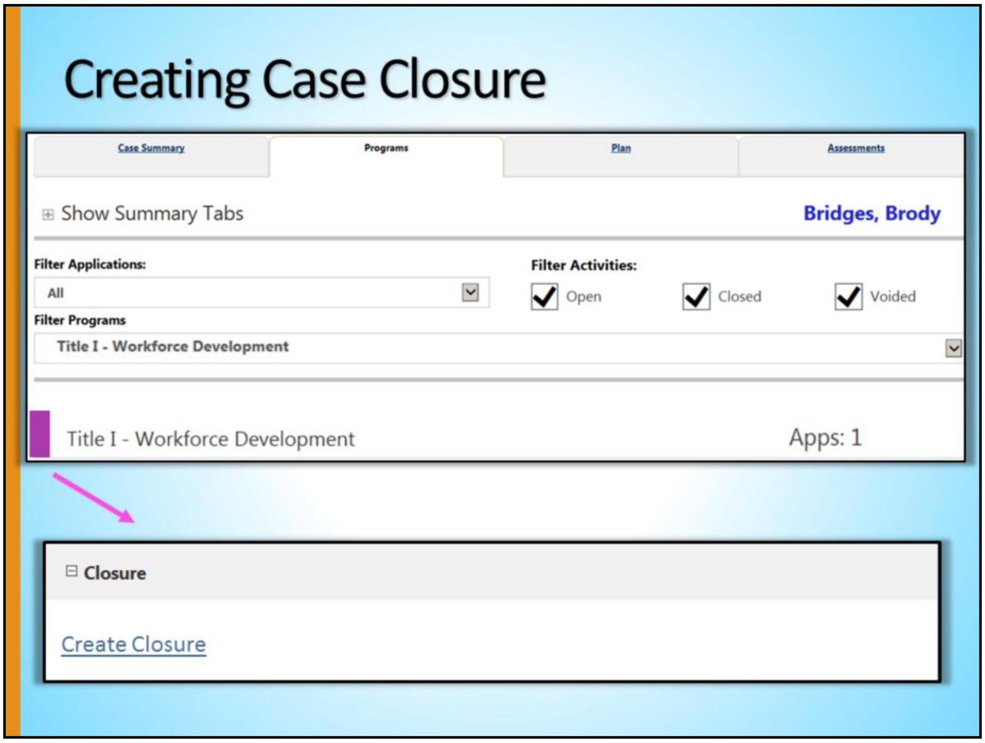
Closure, Exit, and Outcome



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.

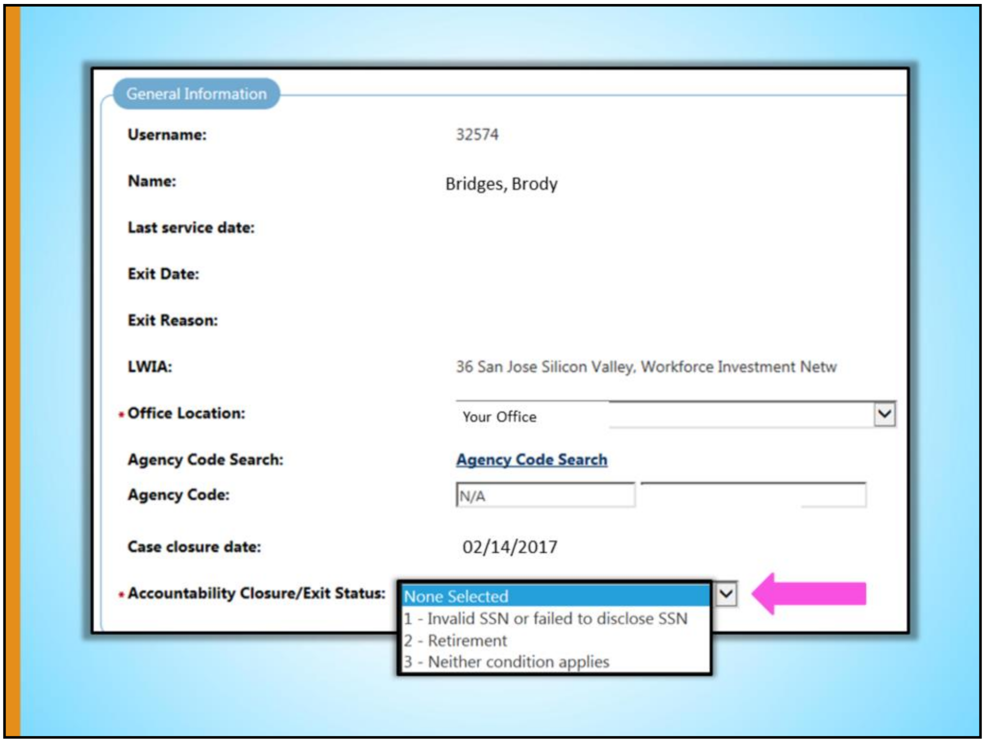


After expanding the Title I Application, and expanding the **Activities/Services/Enrollments** ribbon, you will see the activities table. This table shows that all activities have been closed out. You cannot complete a closure, unless all activities are closed. Once all activities are closed, you can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



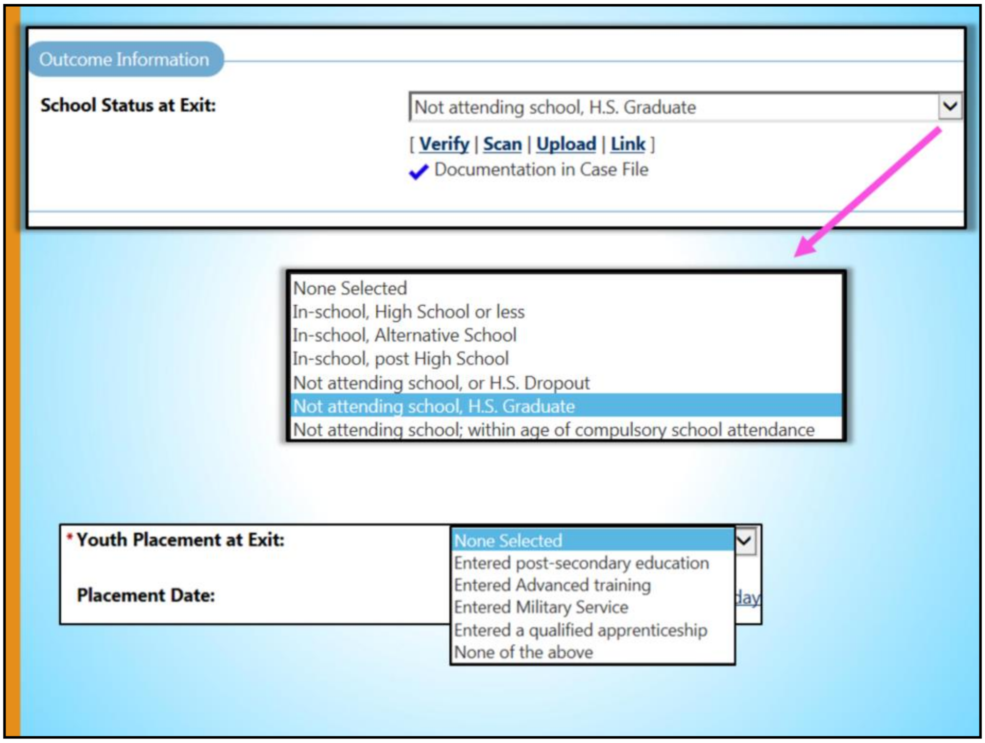
With the Title I Application expanded, click anywhere in the gray ribbon called **Closure** to expand it.

Click the "Create Closure" link.



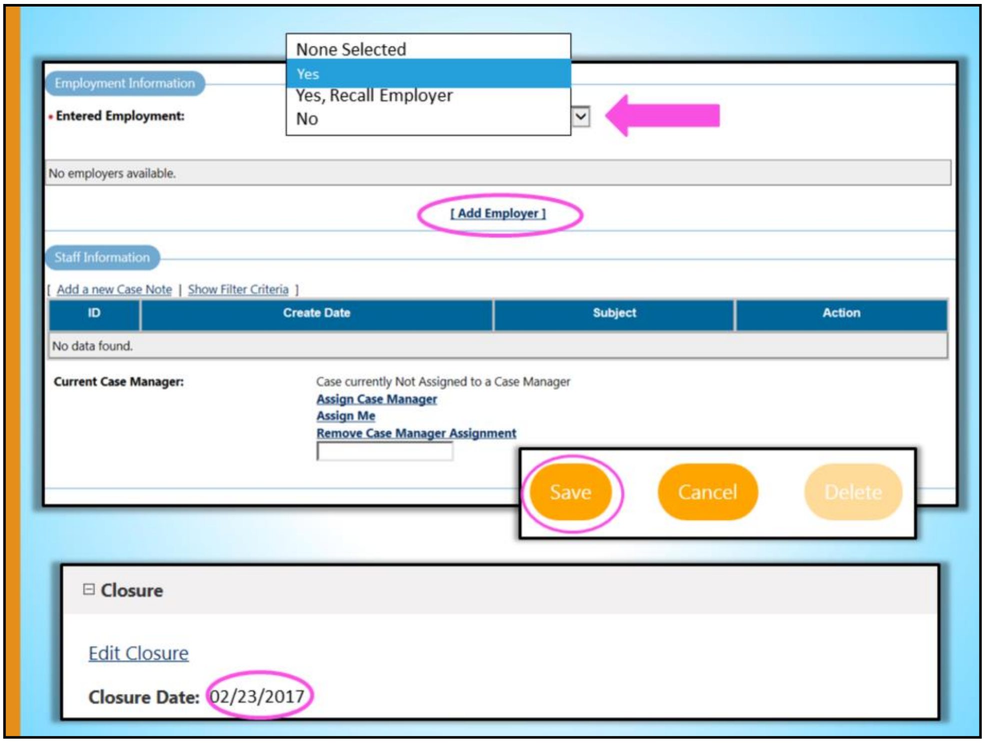
After selecting the "Create Closure" link, under **General Information** enter your **Office Location** if it is not prepopulated.

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."



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.

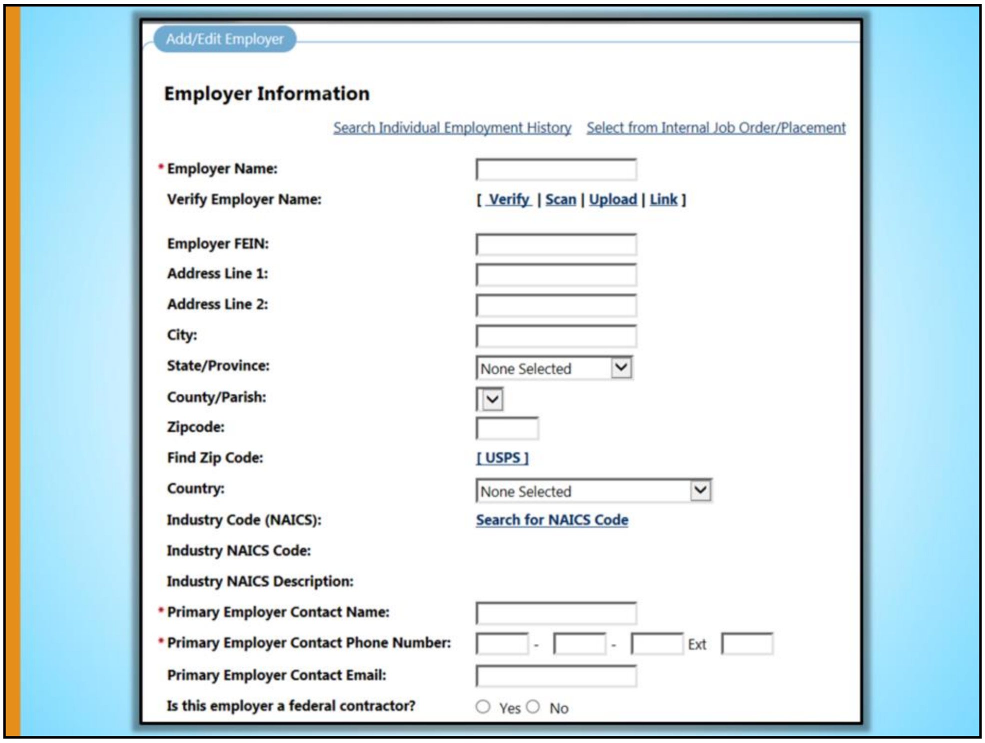


Finally, choose whether or not the individual entered employment in the **Employment Information** section.

If “Yes” is chosen, the employer information must be completed in the system by selecting the “<u>Add Employer</u>” link.

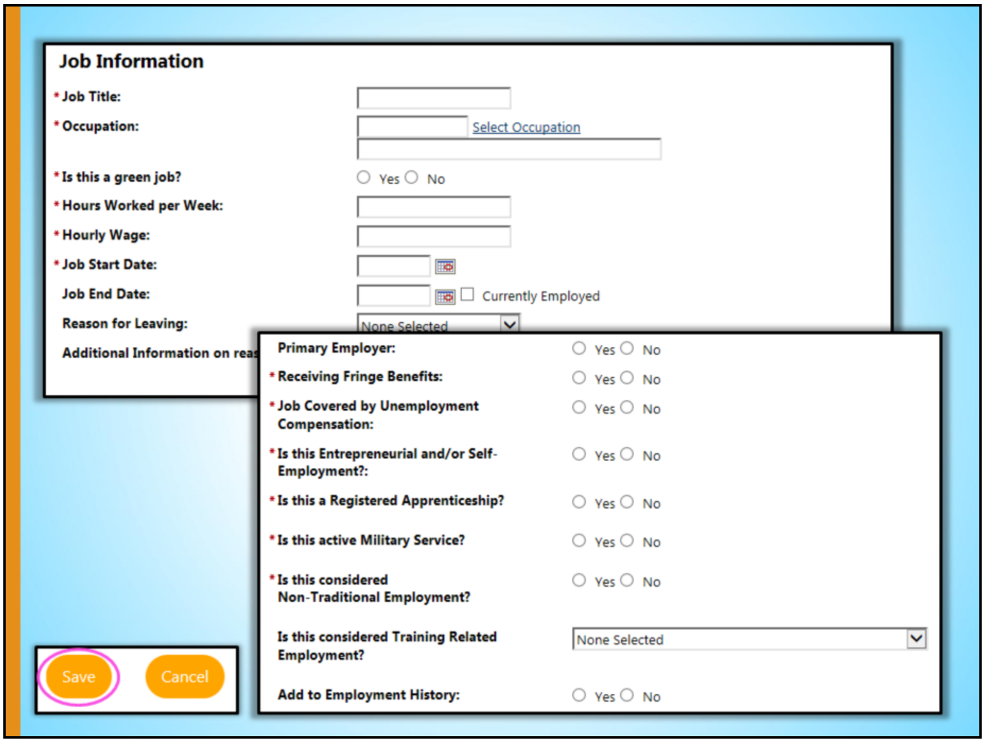
“Yes, Recall Employer” can be selected if the individual returns to work for a previous employer, and that employer has been captured in CalJOBS.

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.

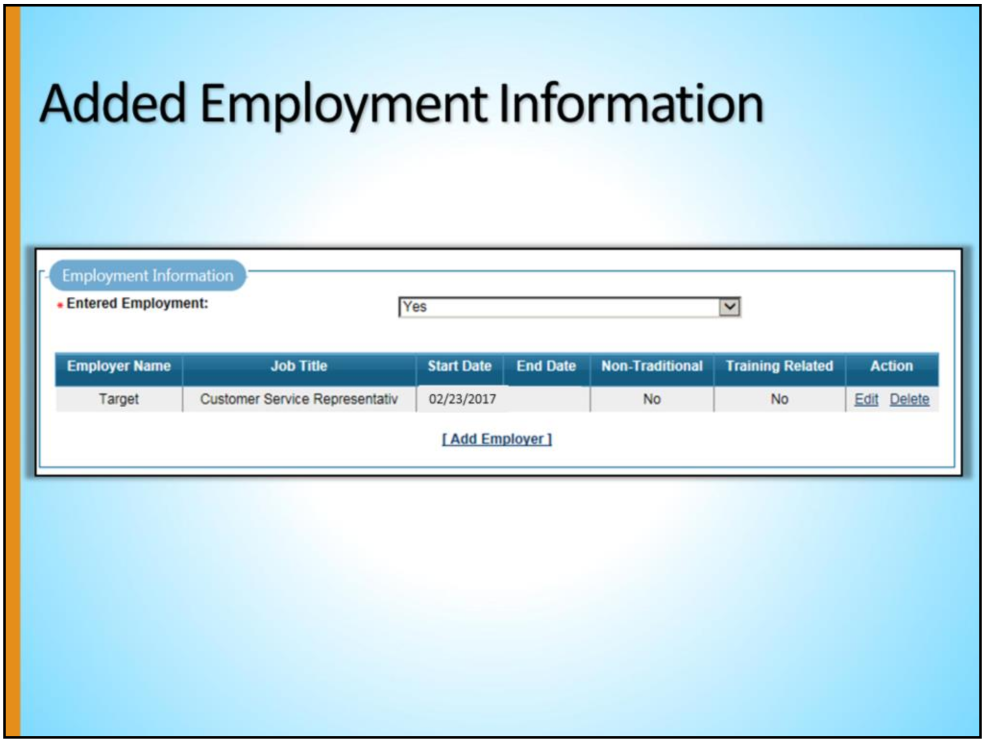


If you selected the "Add Employer" link (shown on the previous slide), please complete the required fields. When typing into the **Employer Name** field, the system may populate a drop-down of potential employers. For example, if you begin typing "Target", a list of possible Target locations will populate 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.

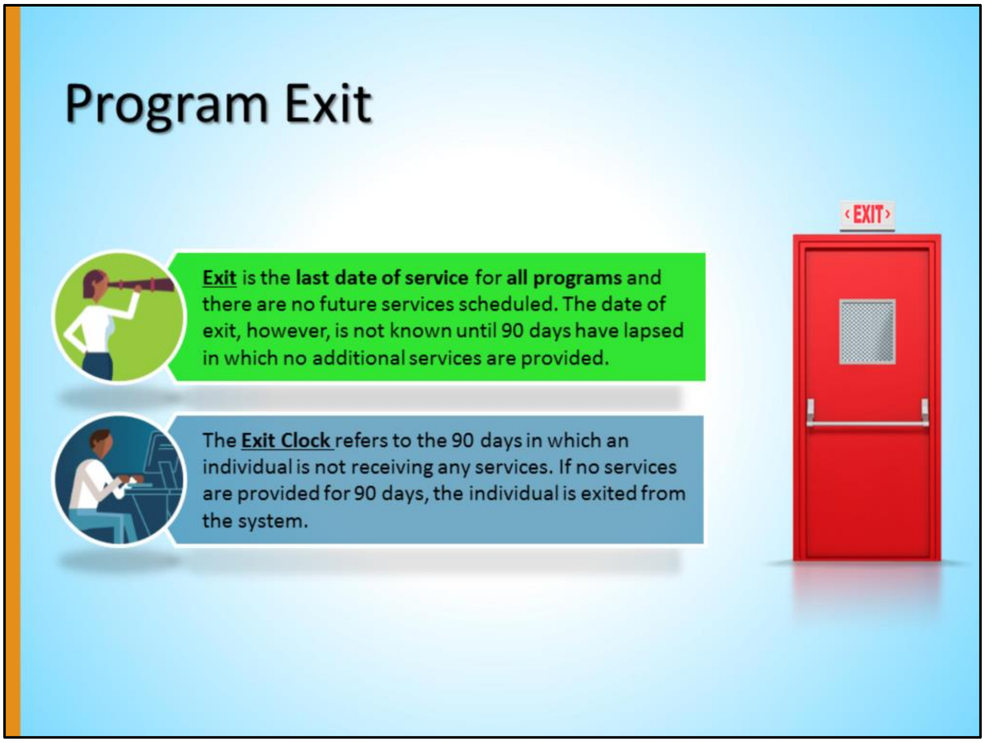


Continuing with the **Add/Edit Employer** section, enter all required **Job Information** fields. Select “Save” upon completion.



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

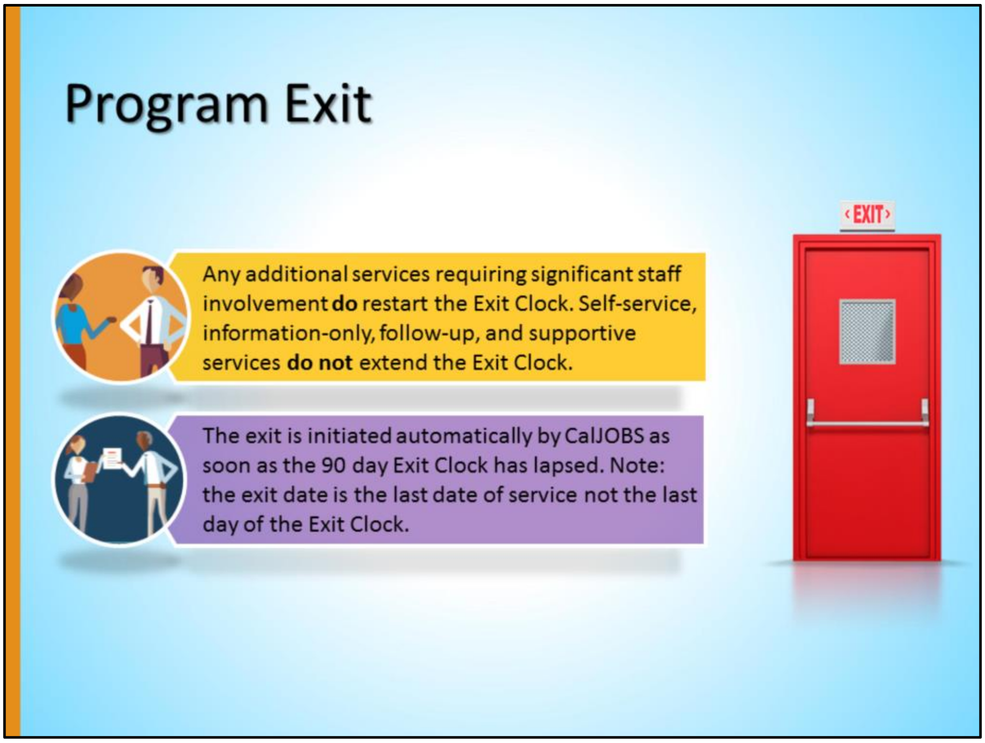
Program Exit and Outcome



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

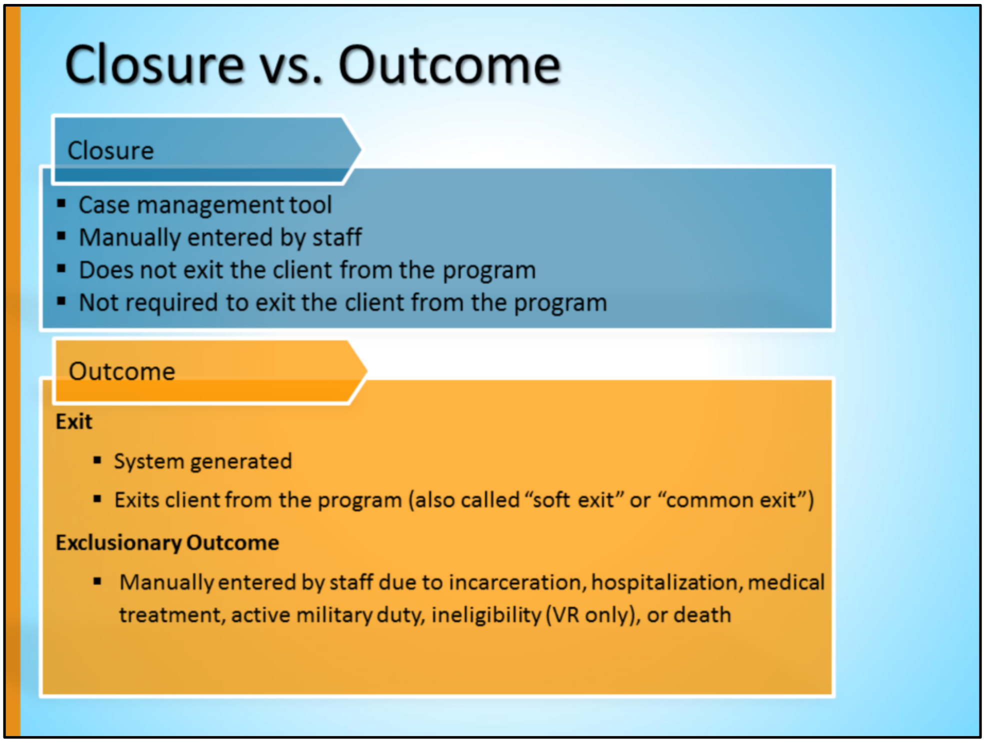
Exit is the **last date of service** for **all programs** and there are no future clock restarting services scheduled. The date of exit, however, is not known until 90 days have lapsed in which no additional services are provided.

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.



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.

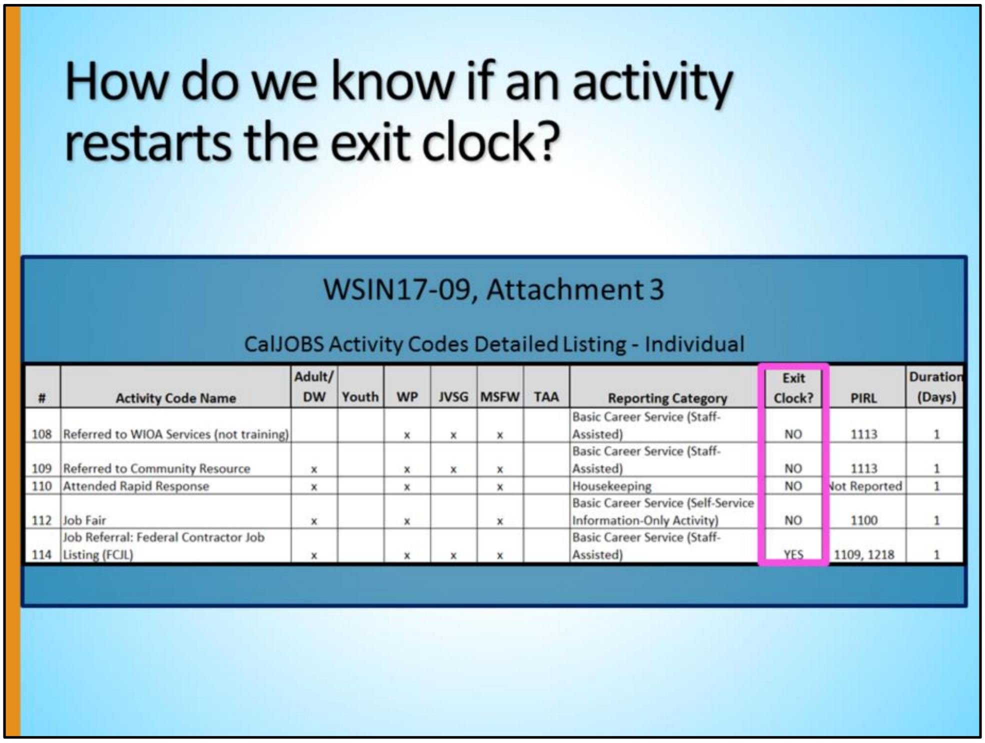


We covered how to create a closure in CalJOBS, but it is important to know that closure and exit/outcome are **not** the same thing.

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.

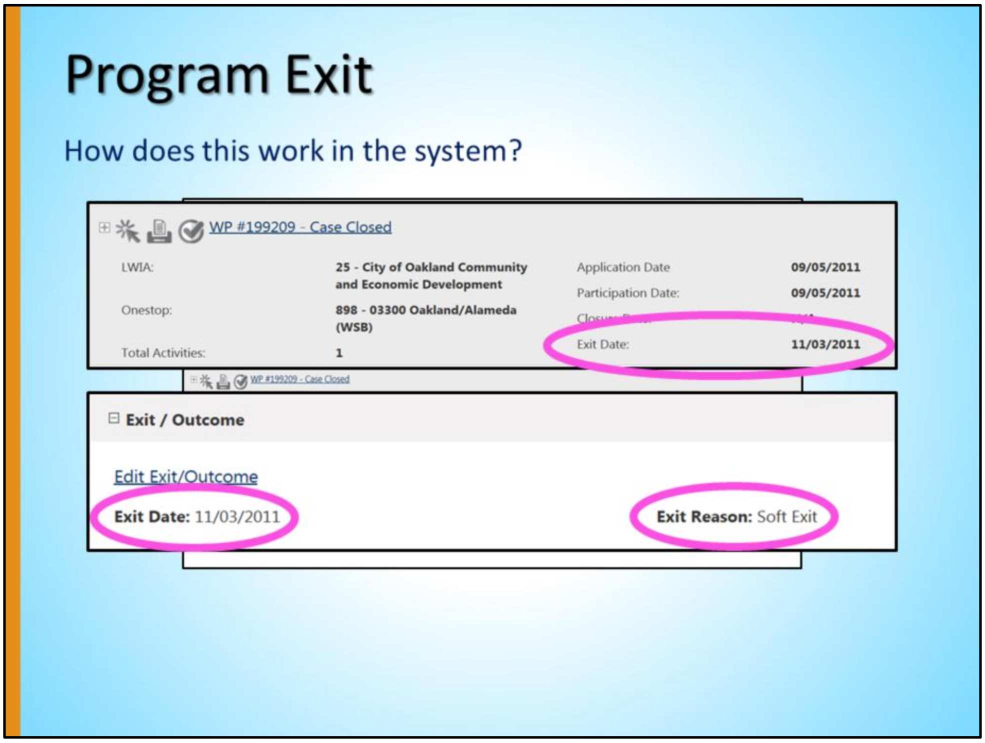
Closing a program gives staff the ability to add follow-up activities, enter employment attainment information, and allows staff to run reports quicker.

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.

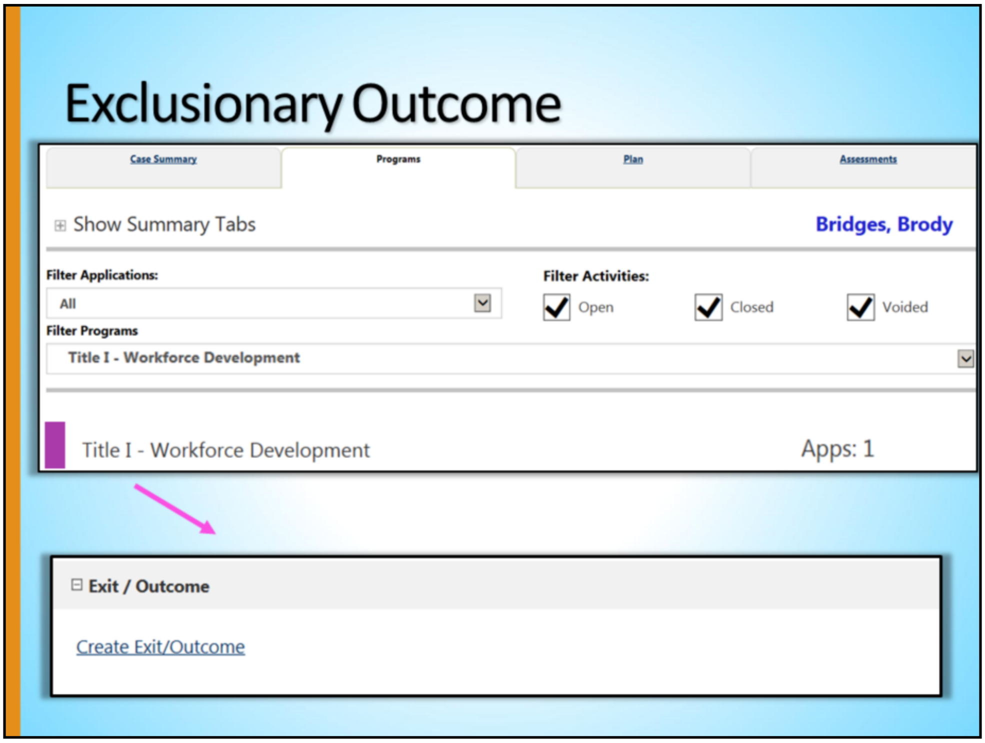


#	Activity Code Name	Adult/ DW	Youth	WP	JVSG	MSFW	TAA	Reporting Category	Exit Clock?	PIRL	Duration (Days)
108	Referred to WIOA Services (not training)			x	x	x		Basic Career Service (Staff-Assisted)	NO	1113	1
109	Referred to Community Resource	x		x	x	x		Basic Career Service (Staff-Assisted)	NO	1113	1
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 (FCJL)	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.



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.

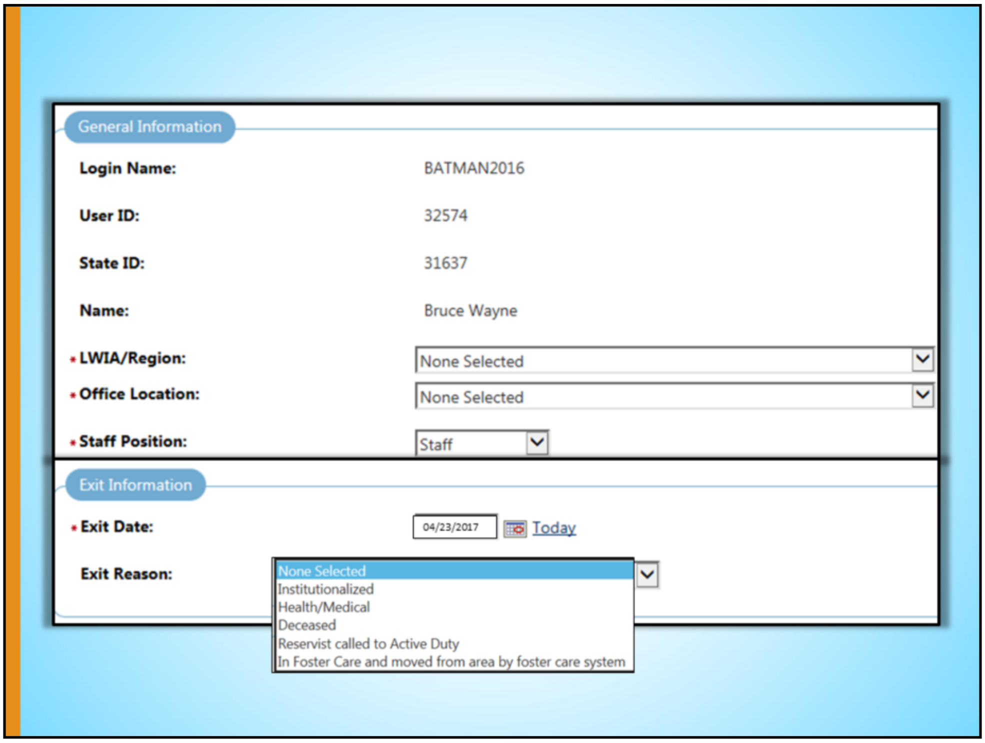


In limited circumstances, a staff member has the ability to tell the system, "I know for certain that this person is not coming back to receive more services". Instead of waiting the 90 days, the participant exits immediately. This is called an Exclusionary Outcome.

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.

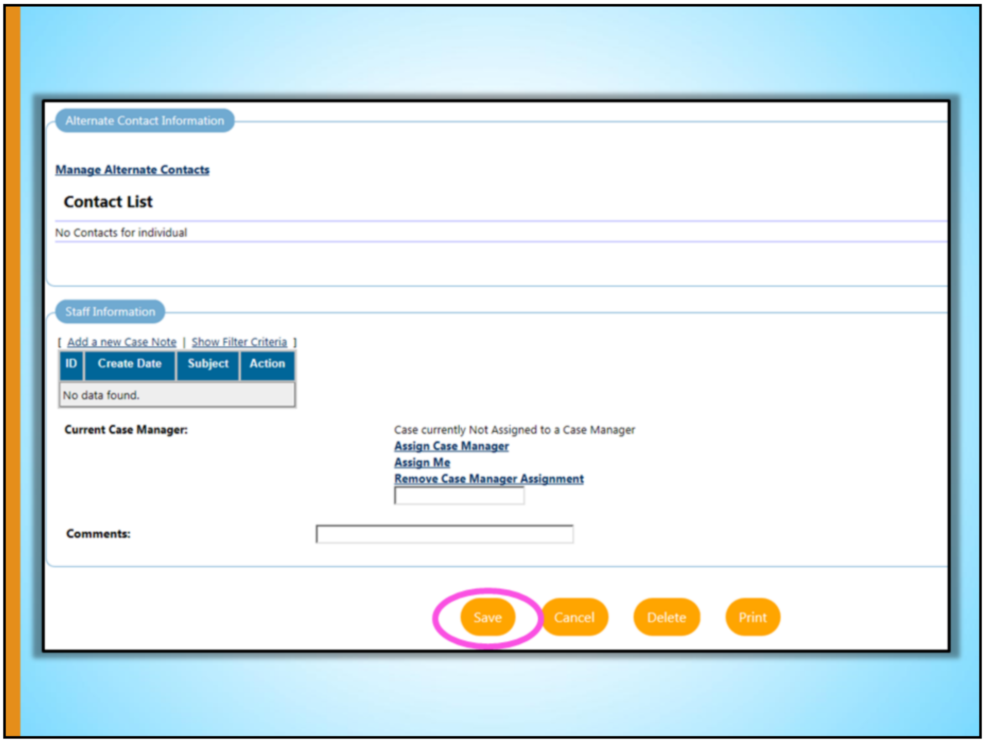
To complete an Exclusionary Outcome, select the "Create Exit/Outcome" link.



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

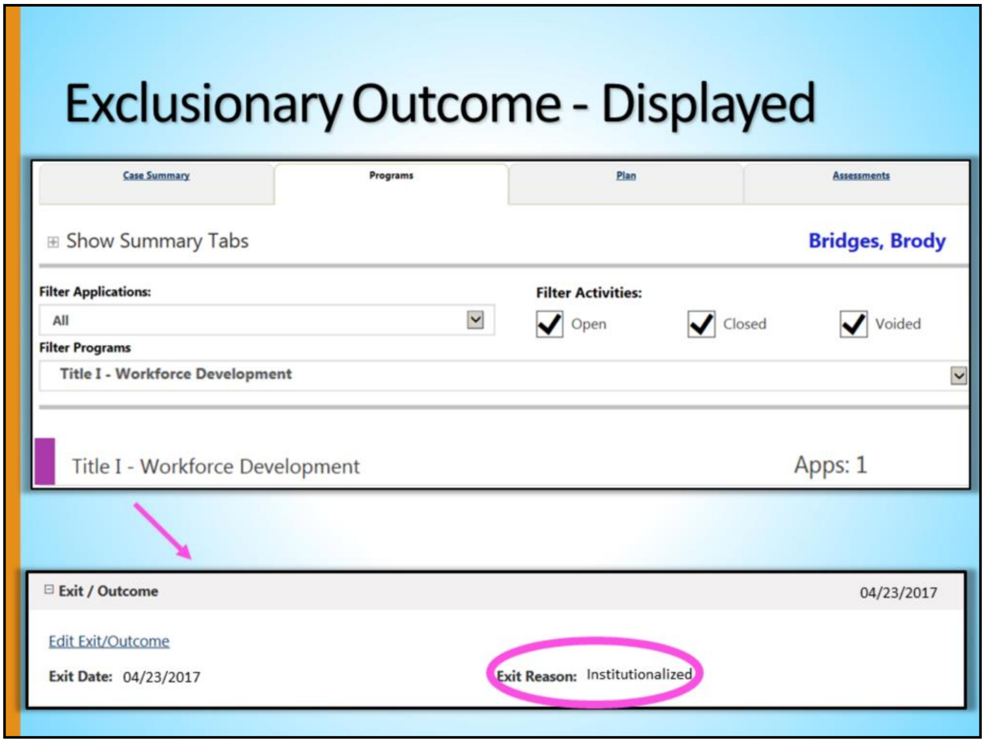
Under the **Exit Information** section, enter the **Exit Date** (last date the individual received a service).

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



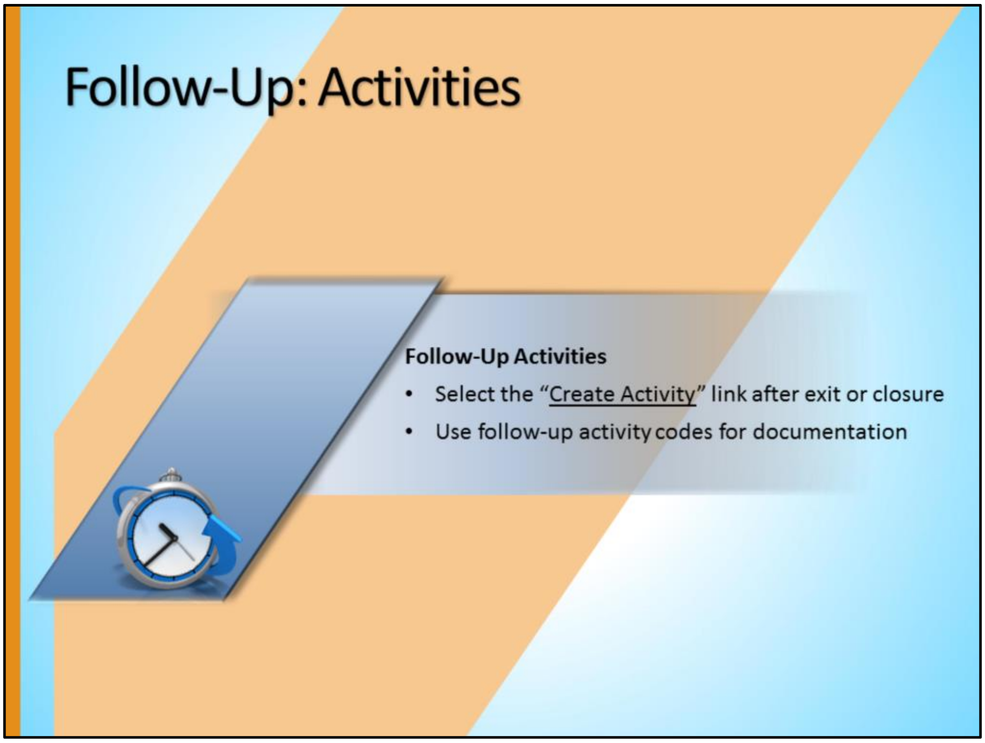
Complete the **Alternate Contact Information** and **Staff Information** sections, if desired.

Select the “Save” button.



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

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

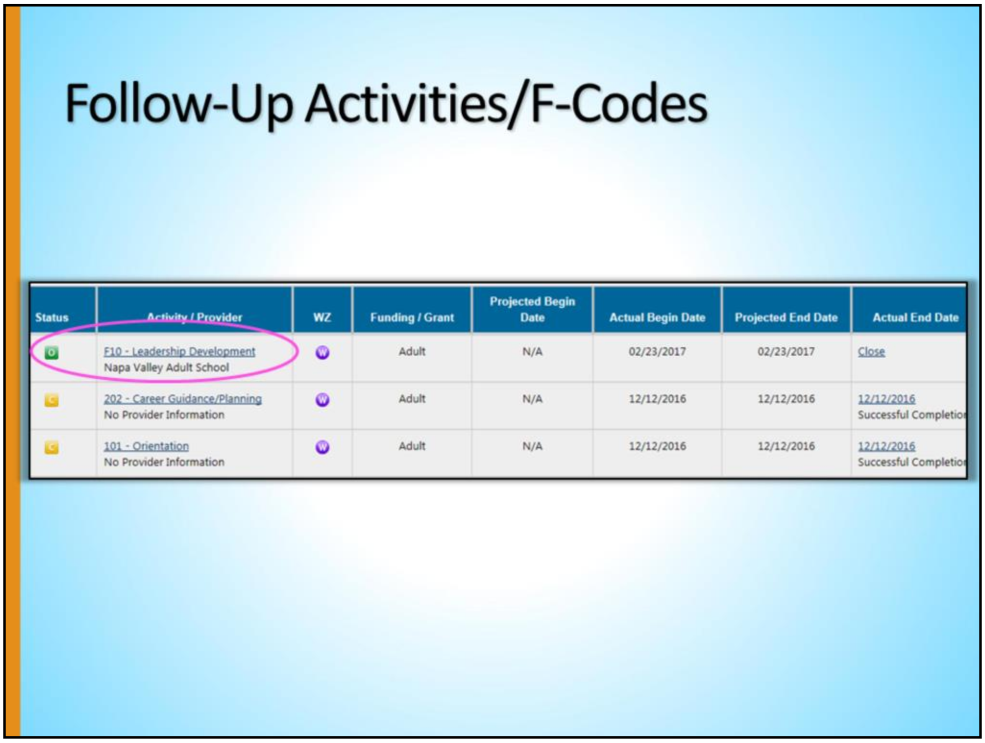


Follow–up activities can be created after exit or after creating closure, by selecting the "Create Activity/ Enrollment/ Service" link from the **Activities/Enrollments/Services** ribbon. Follow-up codes are used for documentation of the services you provide after closure or exit.

Follow-Up Activities

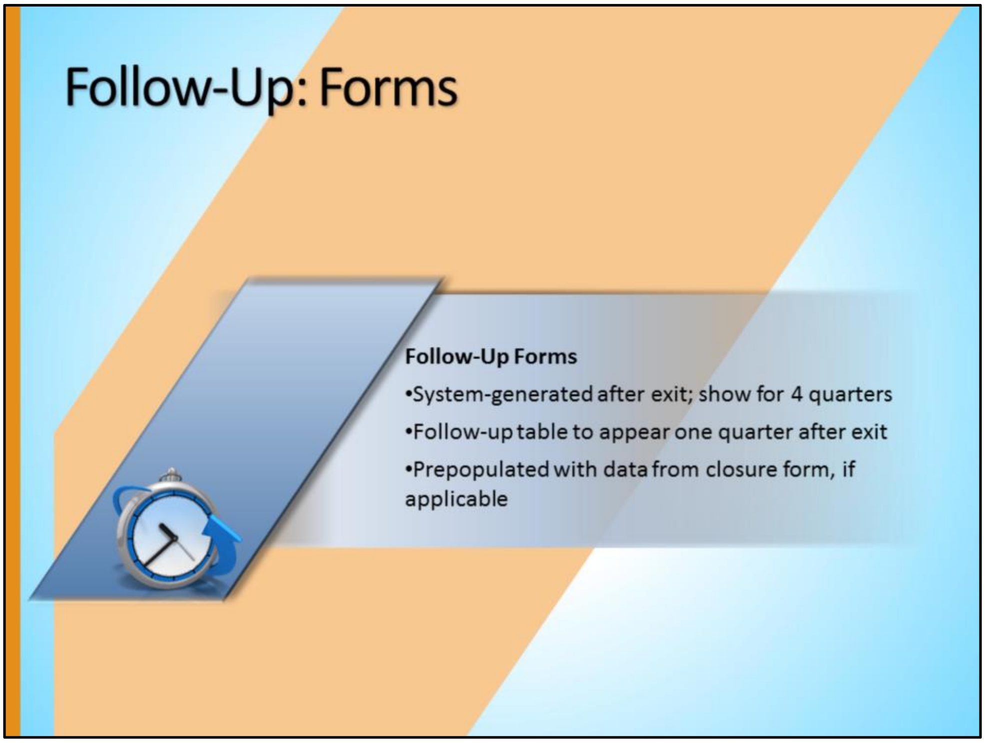
Activity Code	Activity Title
F01	Referral to Community Resources
F02	Referral to Medical Services
F03	Tracking Progress on the Job
F04	Work-Related Peer Support Group
F05	Assistance Securing Better Paying Job
F06	Career Development and Further Education Planning
F07	Assistance with Work-Related Problems
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 know as F-codes because the activity codes to choose from all begin with the letter “F.”



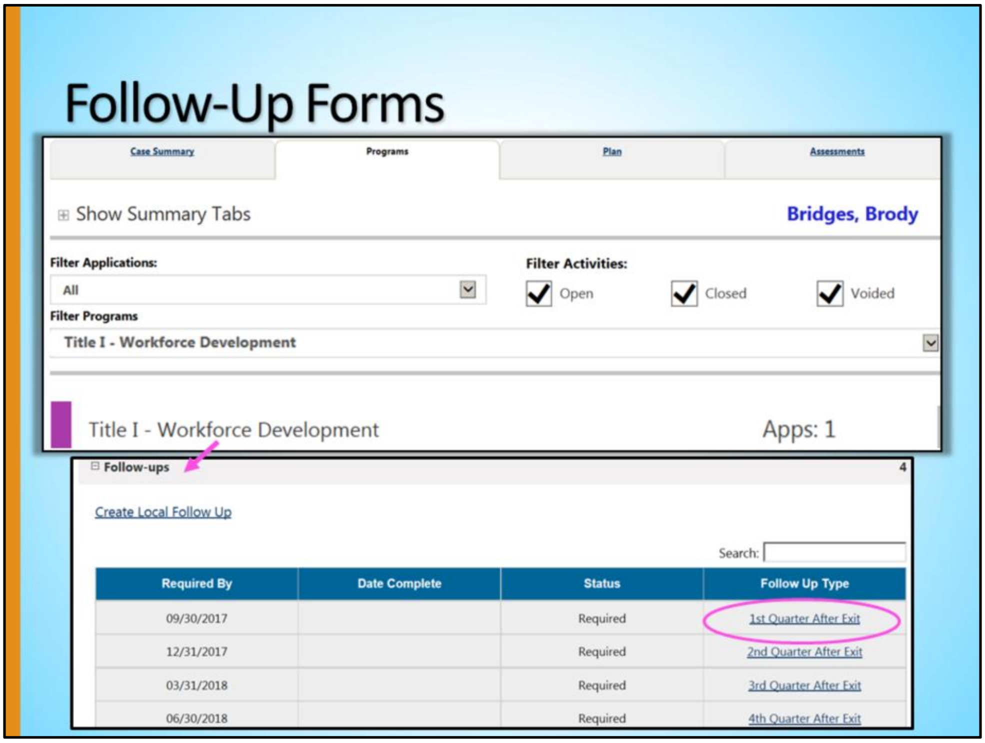
Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	F10 - Leadership Development Napa Valley Adult School	W	Adult	N/A	02/23/2017	02/23/2017	Close
C	202 - Career Guidance/Planning No Provider Information	W	Adult	N/A	12/12/2016	12/12/2016	12/12/2016 Successful Completio
C	101 - Orientation No Provider Information	W	Adult	N/A	12/12/2016	12/12/2016	12/12/2016 Successful Completio

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.

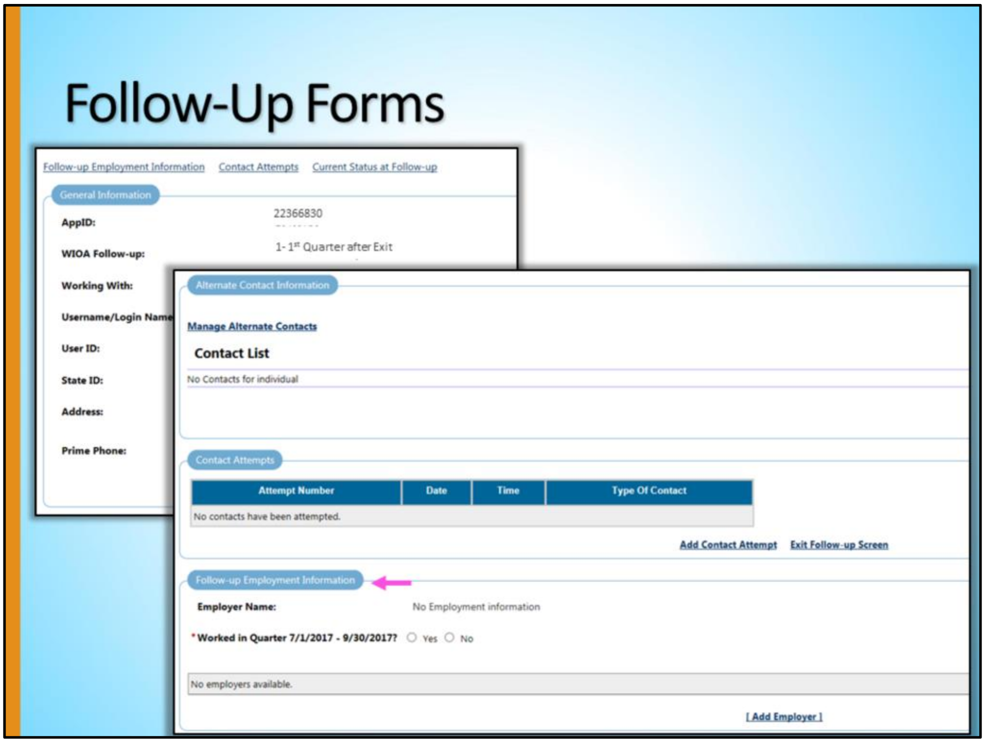
In CalJOBS, the system generates a follow-up table with follow-up forms for 4 quarters after exit. This table does not populate until after the 90th day after exit. If the closure tab was utilized, data from that tab may pull over into the follow-up forms.



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.

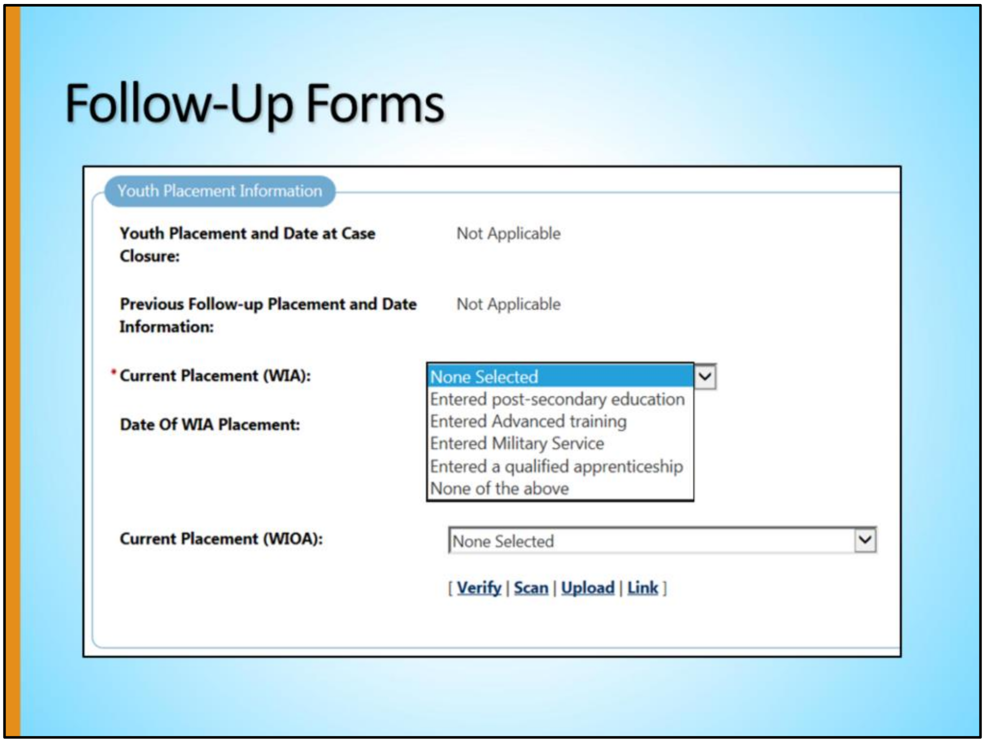
Please note: Case managers can record follow ups only in the current quarter for federal reporting requirements. The system does not allow federal follow-ups to be recorded outside the designated quarterly time periods. If you click a follow-up link prematurely, the system will display an alert stating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



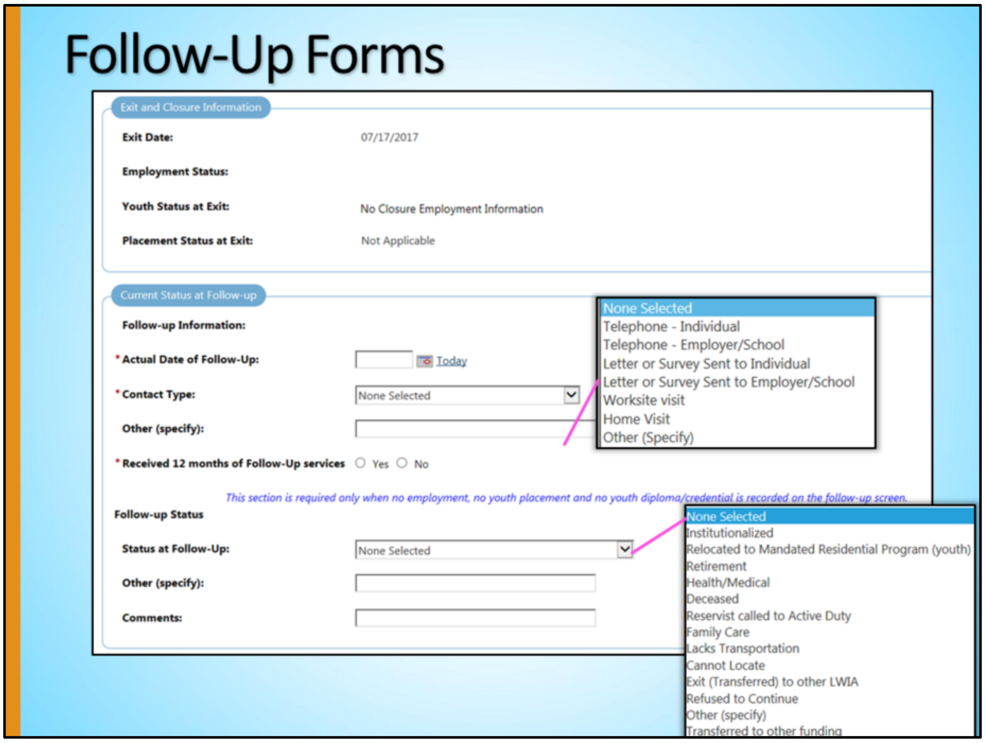
The first section, General Information, populates with system information. **Alternate Contact Information** and **Contact Attempts** can be recorded in the corresponding sections, if desired.

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 <u>Add Employer</u> link. The employer entry screen is the same screen as the one in the closure tab.



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.

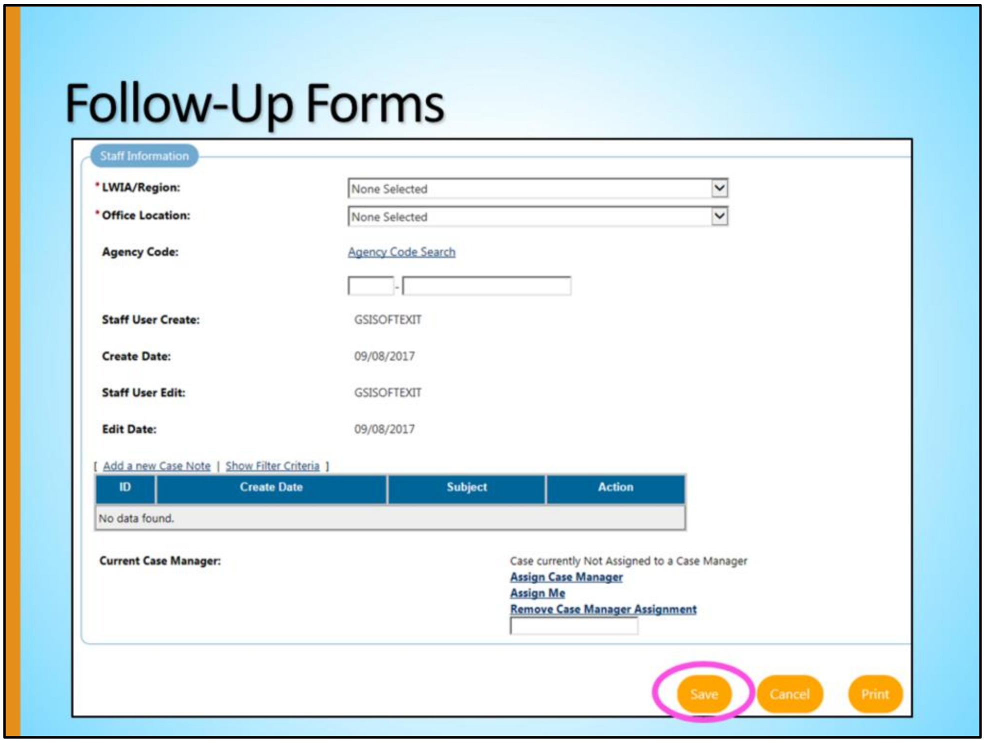


If your individual is not a Youth, the next section you will see if the **Exit and Closure Information** section. This information is system generated.

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.



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	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

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.

For any questions concerning this module, please contact the CalJOBS Education and Development Unit at **CalJOBSTrainingTeam@edd.ca.gov**.