Welcome to CalJOBS Training! In this training, we will review the individual registration process, as well as the Title I application.

This section of the training will cover the following:

- Completing Individual Registration- entering an individual into the system
- Identifying CalJOBS System Business Rules- understanding some key points in navigating the Title I application
- Completing a Title I application- establishing eligibility for your program

Completing
Individual Registration

The first step in using CalJOBS is to register the individual you're serving in the system.
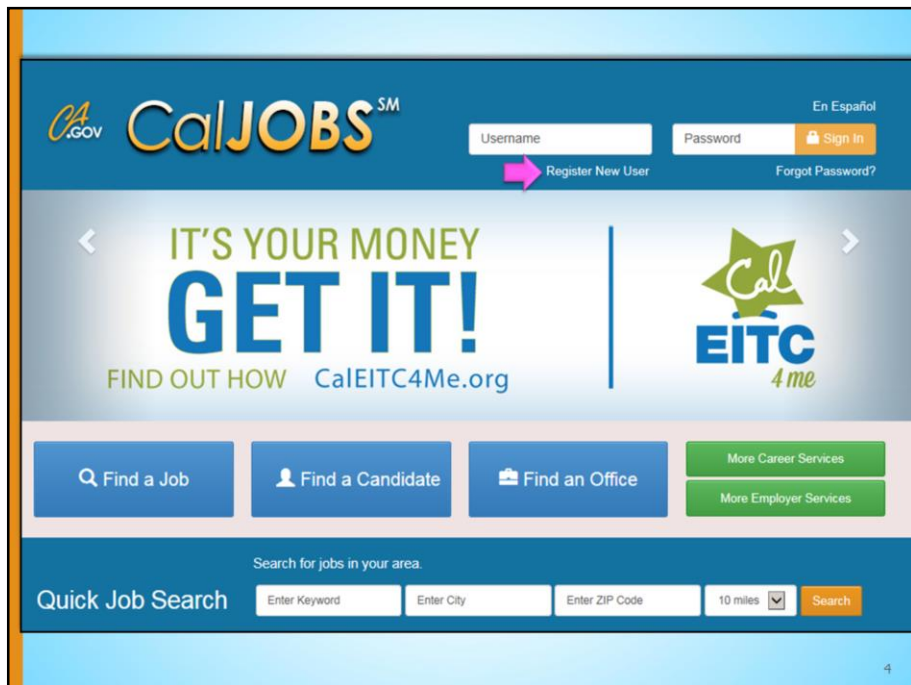
When it comes to registration in CalJOBS, it is encouraged that individuals register themselves in the system. They simply select the Registered New User link at the top right of the home page of **www.caljobs.ca.gov**, and follow the instructions to create a user name and password, and complete their registration.

In addition, you, as a staff member, can complete registration on behalf of an individual. This is what we will demonstrate in this module.
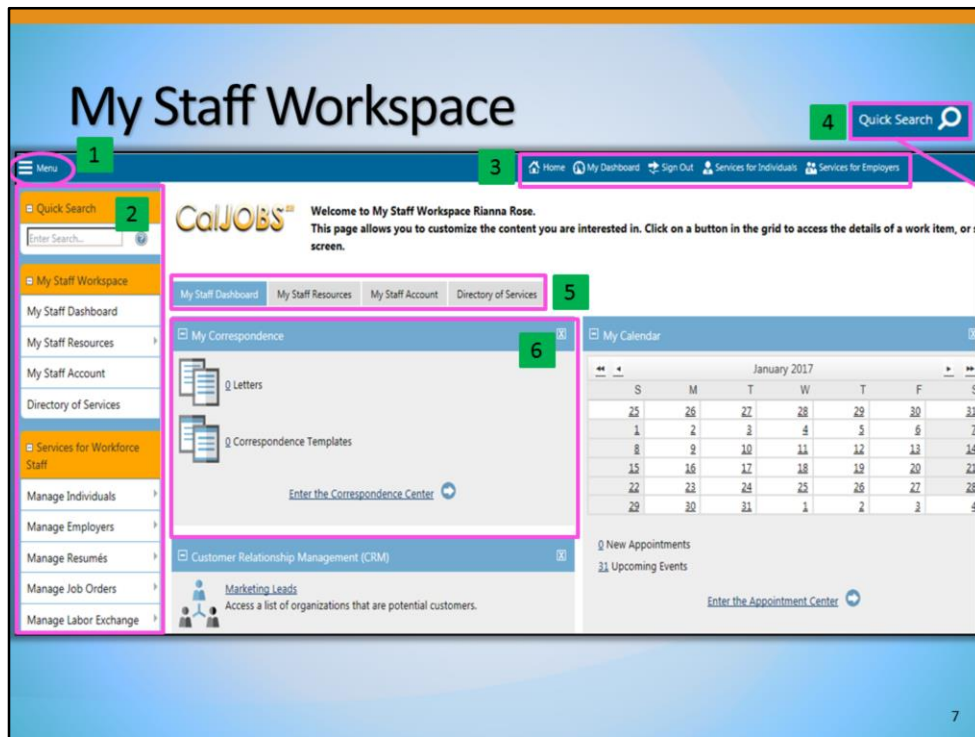
To register an individual, go the **www.caljobs.ca.gov** homepage or "splash page".

Login by entering your staff information into the fields: Username and Password. Select the "Sign In" button to the right.
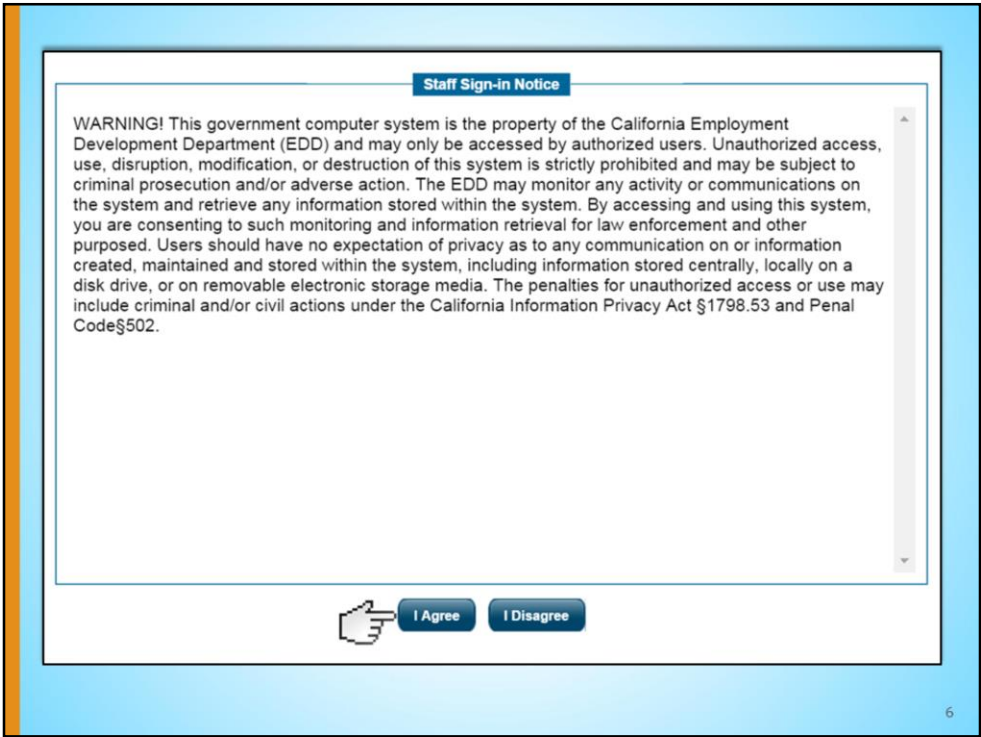
Read the **Staff Sign-in Notice**, select "I Agree".

The first screen you will see is **My Staff Workspace**.

There are six key areas:

1. At the top left corner of the screen there is a hamburger Menu that you can select, and it will expand or collapse the gold navigation menus on the left hand side.
2. To the left of the screen, there are gold navigation menus going vertically down the page. The gold navigation menus are also customizable if you go to **My Staff Resources** > **My Preferences** > **Configure what menu groupings appear**.
3. At the top of the screen, there are short-cut links (**Home**, **My Dashboard**, **Sign Out**, etc). These links follow throughout all navigation of CalJOBS.
4. At the top right of all screens there is a magnifying glass icon for conducting a **Quick Search**. This allows staff the ability to quickly conduct an individual or employer search regardless of where they are in the system.
5. Near the top of the page, there are blue and gray tabs going horizontally across the page (**My Dashboard**, **How We Can Help You**, etc.), which is another way to get to the same pages that we see on the left menu. Left menus or tabs – they accomplish the same thing.
6. The widgets that fill the rest of **My Staff Workspace** are shortcuts to frequently-used tasks and pages. The widgets are customizable, so you can move them, collapse them, and delete them per your preferences.

CalJOBS Training
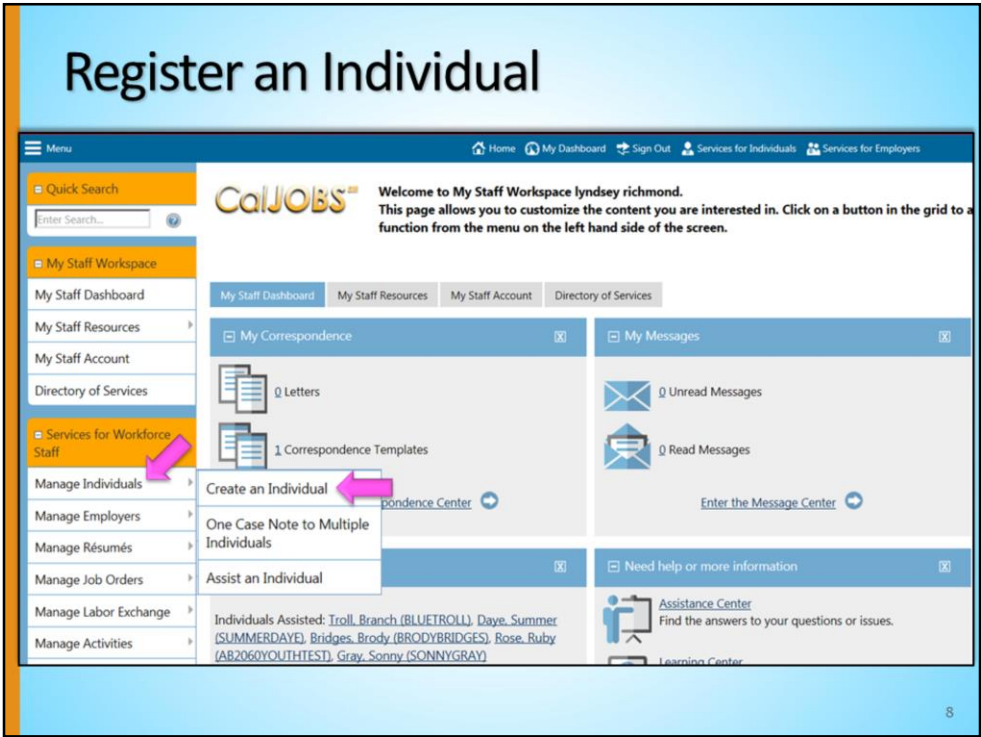
While on **My Staff Workspace,** let's register an individual. On the left menu, under the gold menu heading **Services for Workforce Staff**, hover over **Manage Individuals**, and select **Create an Individual**.

CalJOBS is ready to assist you as you complete the required registration fields. Please note the red asterisks, blue text, question mark icons, and underlined links (e.g., "Find zip code") that will help you complete the individual registration.

Complete the information in the **Login Information** fields. When creating a Username and Password, be sure to write it down to ensure your individual has the correct login information. In addition, refer to the blue text for creation guidelines.

The system defaults the **Password** field to Password1@. You can keep this generic password, but the individual will need to change the password after their initial login.

In the **Social Security Number** section, enter the individual's SSN.

In the **Primary Location Information** section, enter the individual's zip code using the Find Zip Code link if necessary, or simply type it into the box.

Next, select the appropriate option for the **Are you authorized to work in the United States** question. In this example, we selected "Yes".

The **E-mail Address** section is optional, but you may enter the individuals Primary E-mail address here.

In the **Demographic Information** section, if you select that your individual's **Gender** is a Male, you must complete the following question, **Have you registered with the Selective Service?** Notice your options. You may use the Selective Services web site link to confirm if the individual is or is not registered with the Selective Service.

After completing the information on this first page, select the "Next" button at the bottom.

Enter the individual's **First** and **Last Name** (Middle Initial is optional). Select the "Next" button.

Select the "Yes" radio button if the individual is currently homeless.

If the individual is not homeless, enter the individual's **Residential Address**.

If you select "Use residential address" for the **Mailing Address**, the individual's residential address will fill in the fields below. The system will attempt to standardize the address to a known address listing for the area. Note that if the system states that the address is NOT standardized, you may still move further regardless of that message.

Select the "Next" button.

Enter individual's **Primary Phone** and **Primary Phone Type**. The system does have the capability to both text and e-mail notifications to individuals regarding job postings and employer contacts. You can enter information in **Text Message Cell Phone Number** should the individual wish to receive text notifications.

After information is entered, select the "Next" button.

For the **Preferred Notification Method**, choose from the dropdown menu how the individual would like to receive notifications.

The next 2 questions are for statistical purposes, with the first being mandatory (**From where are you accessing this website**). Answer them by choosing the most appropriate option from the dropdown menus.

When finished, select the "Next" button.

For the Citizenship question in the **Citizenship** area, select the appropriate answer.

In the **Disability** section, answer the questions according to your individual's self-disclosure. If they choose to self-disclose a disability, they may be eligible for additional support services and programs.

For the question, **Do you have a disability?**, if your individual answers, "Yes, I have a disability", there is an additional set of mandatory questions that populate. Answer according to your individual's disclosure.

Answer the remaining questions. Once completed, select the "Next" button.

Enter **Education Information** by choosing the most appropriate answers in the dropdown menus. Both questions are mandatory.

When done, select the "Next" button.

Complete the **Employment Information** and **Farm Worker Information** sections.

For the **Unemployment Eligibility Status**, if your individual answers "Claimant" or "Exhaustee", an additional set of mandatory questions will populate (see top right green box "1"). Answer according to your individual's disclosure.

The last two questions are also mandatory, and if "Yes" is chosen for either, additional mandatory questions populate (see bottom right green boxes "2" and "3").

Once all mandatory answers are completed, select the "Next" button to continue.

In the **Job Title** section, as you type the desired job title, a list of auto-complete suggestions will appear in a drop-down list for selection. Select the appropriate title in the drop-down. If the individual's job title does not generate any auto-complete suggestions, you may try to enter an alternative name for that job title. If the system continues to not provide a matching job title, you may enter a unique job title.

Once a desired job title is selected, the "Suggested occupations" drop down should auto-populate in the **Job Occupation** section with similarly related occupations based upon the previous desired job title. If you entered a job title that did not auto-complete, you will need to select the Search for an Occupation link to find the appropriate matching occupation.

After completing both steps, the **Occupation Title** and **Occupation Code** should populate automatically.

Select the "Next" button.

Complete the **Ethnic Origin** section and select the "Next" button.

Answer all mandatory **Military Service** questions.

For the question, **Are you currently in the military, a veteran or the spouse of a veteran?**, when your individual answers "Yes", additional veteran questions will populate (see "Question 1", "Question 2", and so on). If the answer is "Yes" to any of these additional questions, another set of questions may populate to gather more information. When you select "Yes" to **Question 1**, an additional section titled **Transitioning Service Members** will populate and is required. When you select "Yes" to **Question 2** or **Question 4**, an additional section titled **Veteran Information** will populate and is required. See the next slide for the additional **Veteran Information** required.

Select the "Next' button when finished with this section.

Veteran Information

Please enter the information below about your military service.

Did you serve more than 1 tour of duty? ○ Yes ● No

* Military Service Begin Date: 08/05/2010 (mm/dd/yyyy)

* Military Service End Date: 08/05/2014 (mm/dd/yyyy)

* Received a Military Campaign Badge: ○ Yes ● No

[Combat Veteran Web Site]

* Branch of Service: Marines

* Active in the military reserves: ● Yes, I am active in the military ○ No, I am not active in the milit ○ Not Specified

* Most Recent Character of Service Received: Honorable

Other Character of Service:

* Disabled Veteran: Yes, Disabled

• Disability Percentage: 20%

* Homeless Veteran: ○ Yes ● No

Referred by Veteran's Voc Rehab (Chapter 31): ○ Yes ● No

* Are you currently incarcerated or have you been released from incarceration? ○ Yes ● No ○ I do not wish to disclose

* Within the last 12 months, have you been without a paycheck for 27 or more weeks? ● Yes ○ No ○ Not Sure

Veteran Status: Yes, Eligible Veteran

[Obtain DD214]

Recently Separated (within 3 years): Yes

* Have you attended a Transition Assistance Program (TAP) Workshop within the last three years? ○ Yes ● No

23

If applicable, complete the required fields in the **Veteran Information** section (explained in the previous slide).

Next, answer all of the **Public Assistance** questions. If your individual answers "No" to the first 5 questions, an additional 2 mandatory questions populate at the bottom (highlighted box). This section will help determine eligibility for certain program services based on low income.

Once completed, select the "Finish" button and **registration in CalJOBS is complete**.
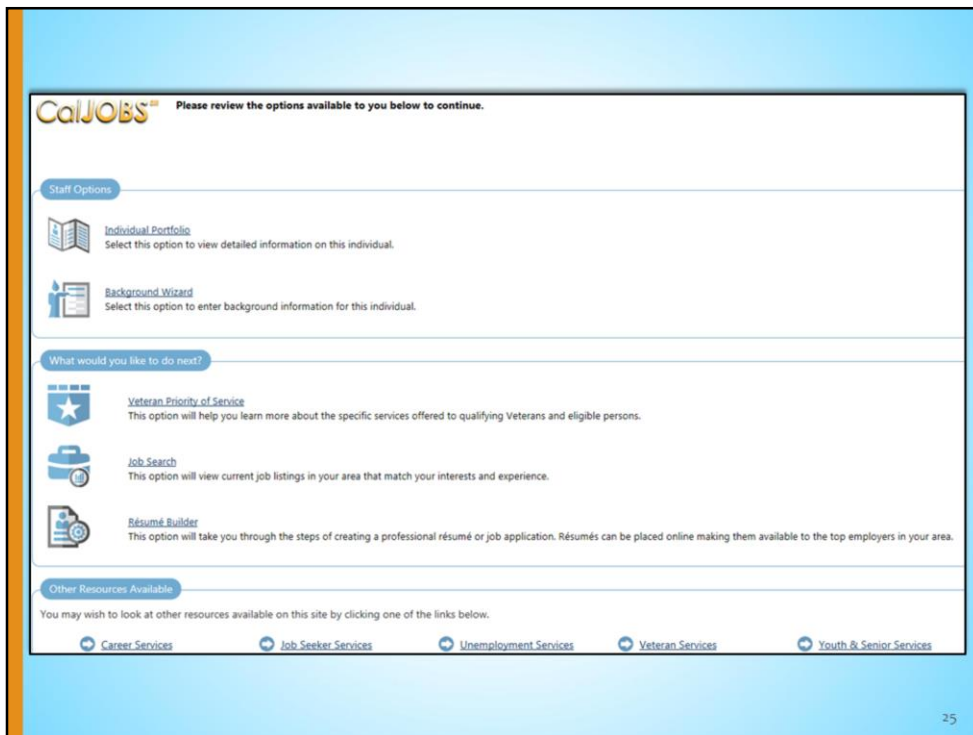
This page displays after registration is completed.

There are several options shown here: Under **Staff Options**, we can, 1) select the Individual Portfolio link to continue to create a WIOA Program Application for the individual , or 2) continue on and create the Background Wizard.

Below the **What would you like to be next section?** we can select Veteran Priority of Service, Job Search, or create a resume by selecting Resume Builder.

Identifying
CalJOBS System
Business Rules

Before we get started, there are some important notes to understand about the CalJOBS System. These next 3 slides will provide important information for you to know as you utilize the system for your case management activities.

The "30-day lock-down" rule:

The **Application Date** is the date a staff member initiates a Title I application so that an individual may receive Title I programs and services. This date cannot be backdated beyond 30-days, nor can it be a future date. For example, staff creating an application on January 31 will be stopped in the system if they attempt to enter an application date that is sooner than January 1 or later than January 31.

The **Eligibility Date** is the date an individual is determined eligible to receive services. This date does not have to be the same as the application date, but it cannot be before the application date or a future date.

CalJOBS System Business Rules

Partial save = Not enrolled

☐ Check here to allow saving of a partial application

- Incomplete version can be completed at a later date
- Considered **not complete** and **not enrolled**

28

When completing a Title I application, staff have the option to partially save an application instead of completing it at that moment if need be.

When this box is checked, an incomplete version of the application is saved and no enrollment records can be created against this application. A partial save allows you to come back and finish the application at a later date/time, however you need to keep in mind the 30-day lockdown feature within the CalJOBS system.

Please note: A *completed* application DOES NOT enroll the individual into the program.
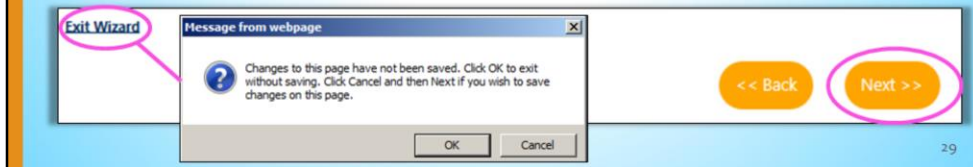
CalJOBS System Business Rules

Exit Wizard vs. "Next"

Exit Wizard
    Data entry on current screen will not be saved

"Next" Button
    Saves application up to current screen

As you complete the application, you will notice the <u>Exit Wizard</u> link and the "Next" button.

When <u>Exit Wizard</u> is selected, you will exit the application, saving only data prior to the step or current screen. None of the data entered on the current screen will be saved. In order to save entered data you must click "Next".

Completing a Title I Application

Now that we've identified a few business rules, we will begin the steps to create a Title I application.

After logging into the system, the first page you will see is **My Staff Workspace**. 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 fly-out menu, as shown by the lower arrows.

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.
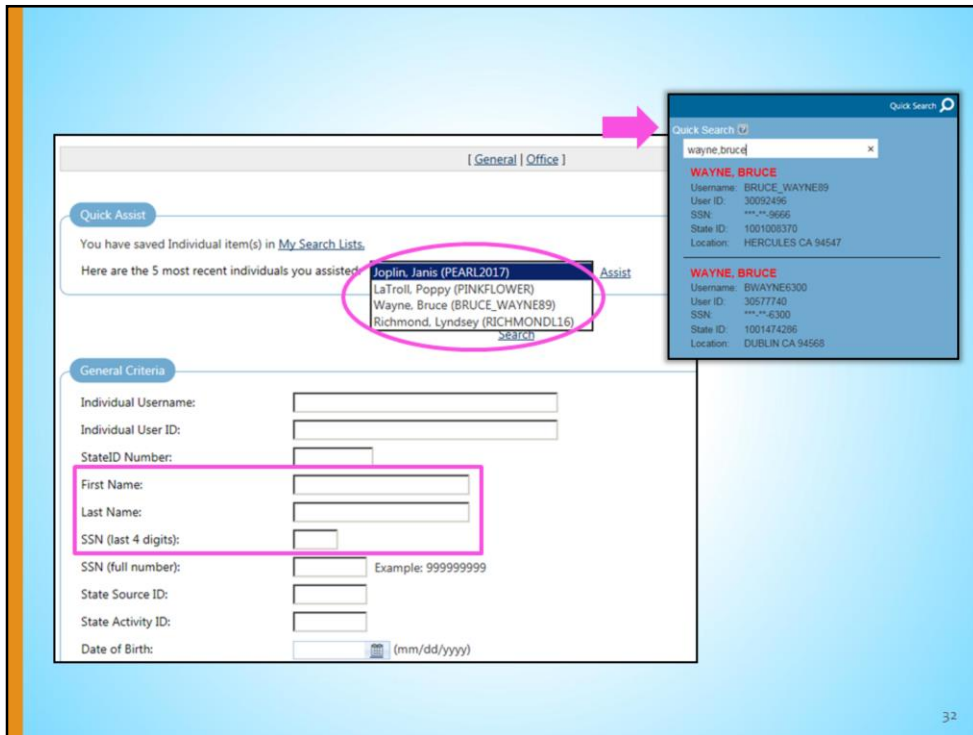
There are different search options including **Quick Assist** and **General Criteria**.

Also, there is a **Quick Search** at the top right corner of every page.

It is recommended to search by First and Last Name and the last 4 digits of the individual's Social Security Number (SSN). If you have the individual's full SSN, enter it in the designated search box. This will help eliminate the likelihood of opening the wrong person's profile.

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 ■
BRUCE_WAYNE89 ▥ SBE VETERAN	Bruce	Wayne	9666		1001008370	02/09/2015	N		02/09/2015	Summary Tab Notes Tab Activities Tab Programs Tab	☐
BWAYNE6300	Bruce	Wayne	6300		1001474286	04/27/2016	N		02/02/2016	Summary Tab Notes Tab Activities Tab Programs Tab	☐
										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.
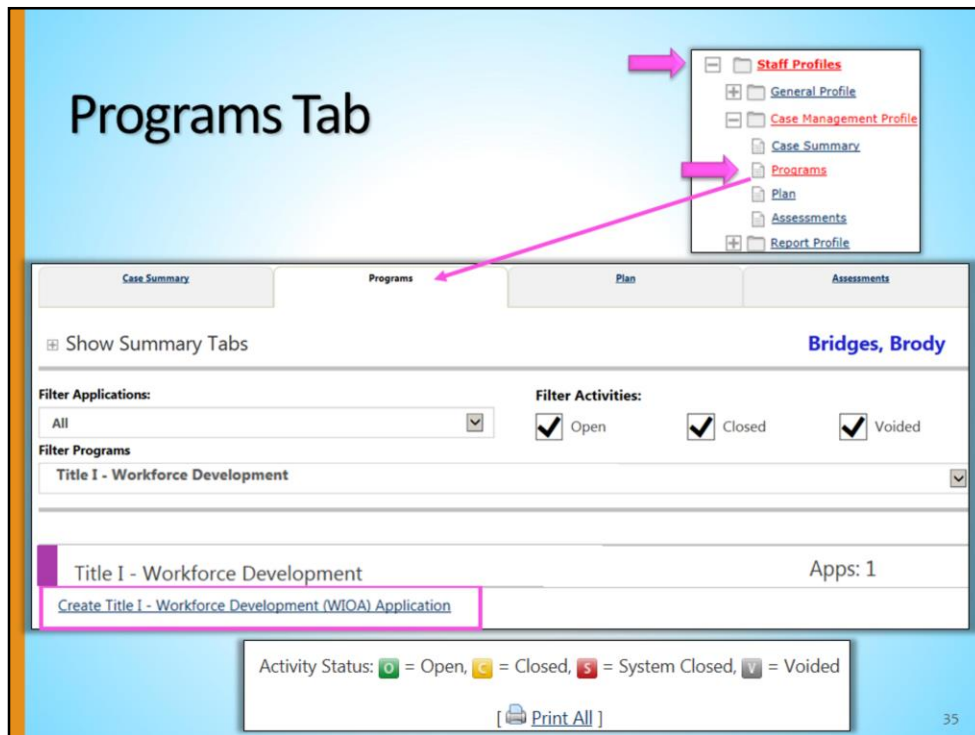
Note the Veteran indicator with the flag in the User Name column.

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.

After the **Right to Work Verification** screen, you will navigate to the **Programs Tab**. At the top of the screen, expand the Staff Profiles folder and then the Case Management Profile to access the Programs link. Select the Programs link.

Here you will see a summary of the various programs an individual can be enrolled. Find the ribbon with a purple tab titled, **Title I- Workforce Development**, and select the Create Title I- Workforce Development (WIOA) Application link.

This begins the **WIOA Wizard**, a step-by-step data entry process. As you complete the required fields in each step, a green checkmark will appear on the WIOA Wizard.

The first two sections of the **Start** tab generate auto-filled from the information that was entered during registration.

Please note: You may see a "?" mark bubble in some categories of questions throughout the application. When you click on the bubble, a pop-up of information further defining the question or set of questions will appear.

All of the elements on this part of the screen are extremely important, as they directly affect the ability to enroll into activities by grant later in the process.

Application date – The system will only accept an application date that is within the last **30** days. As mentioned in the CalJOBS System Business Rules section of this training, this is the 30-day lockdown. In addition, the application date cannot be a future date.

Eligibility Category – Choose the appropriate eligibility category based on your contract, grant and funding stream. For today's training purposes we are choosing "Adult".

Eligibility Date – The selected eligibility type date (i.e., Adult) cannot precede the Application Date, nor can it be a future date.

Location Information – Be sure to choose your Local Area/Region from the first dropdown. Then choose your office from the dropdown next to "Office Location of Responsibility." The third dropdown will then autofill.

If your Area uses Agency Codes, select the <u>Agency Code Search</u> link to search for the appropriate code.

Select the "Next" button at the bottom of the page to save the information entered and move forward in the application.

The next step of the Wizard is the **Contact** tab. The Title I application process involves reviewing and verifying a lot of information that was entered during individual registration. Staff must ensure the information is up to date and accurate.

After confirming that the information in each required field is correct, you may select the Verify link as needed.

Verify Links

- Allow you to verify documents
- Check your organization's business rules
- System may default to "Documentation in Case File"

[**Verify** | **Scan** | **Upload** | **Link**]
✔ Documentation in Case File
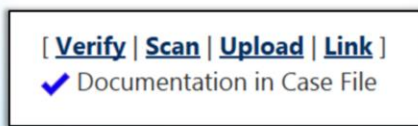
Let's take this time to talk about the Verify links within the application.

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.

Current Address

* Address 1:	555 Sunshine Ln
Address 2:	
City:	Redding
* State:	California
* County/Parish:	Shasta County
* Zip Code:	96001 [Find Zip Code]
* Country:	United States
*	[Verify	Scan	Upload	Link]
* Primary Phone Number:	530 645 5555 Ext.
* Primary Phone Type:	Cell/Mobile Phone
Alternative Phone:	Ext.
Alternative Phone Type:	None Selected
Fax:	
Email:	

40

Continuing with the **Contact** step of the application, review the information entered under **Current Address** to ensure that it is correct.

Moving on, for the **Mailing Address** section there is an option to select if the mailing address is the same as the residential address. If it is the same, check the "Check here to use the residential address information" box. The system will then attempt to standardize the address.

If the Mailing Address if not the same as the residential address, enter the correct **Mailing Address**.

If the address does not standardize, staff may check the box labeled, "Staff has reviewed this address for correctness."

Finishing up the **Contact** tab, if the individual has one or more alternate contacts, it is helpful to add this for the purposes of locating individuals or obtaining updated information. To add an alternate contact, select the Manage Alternate Contacts link.

Please note the Exit Wizard link at the bottom of the page . If you select this link, the system will populate a message. If you select "OK" to the message, the information on the current page will not be saved; however, all previous application pages will be saved.

When this screen is completed, select the "Next" button to move forward.

The next step of the application is the **Demographic** tab. Most of this information auto-fills from individual registration. Review all fields for accuracy.

Please note: Individuals who are required to register for Selective Service must have done so in order to receive Title I-funded services. To easily verify whether or not an individual has registered, use the Selective Service Website link to open the site and find the information.

This screen shows the rest of the **Demographic Information** screen. Review all fields for accuracy, and select the "Next" button.

Moving on to the **Veterans** tab. If your individual is not a Transitioning Service Member, select the "No" radio button. If they are a Transitioning Service Member, select the "Yes" radio button and complete the subsequent fields that generate as mandatory.

For our training purposes, our individual is not a Transitioning Service Member.

If this individual is a Veteran or Other Eligible Person, select the corresponding radio button and enter any required information. Some information may have auto-filled from individual registration; please check for accuracy. If your individual is not a Veteran or Eligible Person, select the "No" radio button.

Select the "Next" button to continue.

Next, is the **Employment** tab. Answer the required fields in the **Employment Information** section. If you select that the individual's **Unemployment Eligibility Status** is "Claimant" or "Exhaustee," the system requires that you must complete the **UI Referred By Status** and the **Claimant has been exempted from work search** fields.

Although there is not a red asterisk next to the field **Number of Weeks Unemployed**, it must be completed with a value greater than "0" to move forward in the application.

Please note: On some occasions, the **Long-term Unemployed** field may have a red asterisk, indicating that it is required.

If the individual did not enter employment history during registration, it can optionally be entered here by selecting the Add Employment History link.

If you choose to not enter employment history and all fields are complete, select the "Next" button to continue.

Adding Employment History

Employer

• Employer Name:	Target
Address:	1280 Dana Dr
Store / Location Number:	
Zip Code:	96003
• City:	Redding
• State / Province:	California
• Country:	United States

Job Title

Please enter a job title below for this employment history. As you are entering the job title, you may see a list of common job titles similar to what you are entering. If you see your job title in the list, select it.

• Job title:	Administrative Assistant

Occupation

Please select the occupation that best matches your job title. You may either select from the Suggested Occupations drop-down list, which is populated based on the job title above, or you can search for an

Suggested occupation(s):

Human Resources Assistants, Except Payroll and Timekeeping

[Search for an occupation]

• Occupation title:	**Human Resources Assistants, Except Payroll and Timekeeping**
Occupation code:	43416100

49

When the <u>Add Employment History</u> link is selected, the next screen asks for the **Employer**, **Job Title**, and **Occupation** information. When you start typing the employer name in the first field, a dropdown of choices may appear. Be sure to choose the correct location if there are multiple options.

If the employer information does not auto-populate, simply type their information in the fields provided.

Enter the **Job Title** in the space provided. As you are entering the job title, the system may try to match your entry to an established list of job titles already entered in the system. If you see your job title in this list, select it. If you don't see your job title on the list, continue to type in your appropriate title.

After selecting your **Job Title**, the page will reload to display recommended **Occupation Titles** based upon your job title. If you see your occupation listed in the dropdown menu, select it. If you do not see your occupation listed, click the <u>Search for an occupation</u> link to find the correct occupation.

Complete the other required sections.

Complete the required **Position** information.
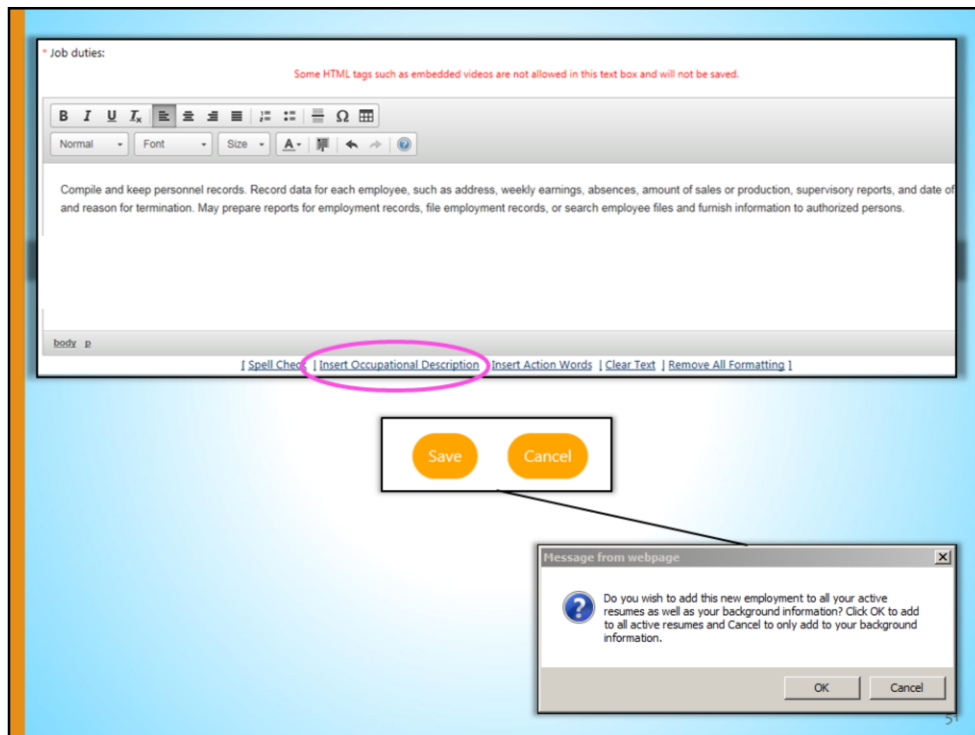
Complete the Job duties summary. Job duties can either be typed in, or selected from the <u>Insert Occupational Description</u> link at the bottom of the text box.

Once these fields are completed, select the "Save" button to continue.

After you select "Save", you will receive a pop-up message. Click **OK** if you wish to add this employment information to the individual's Resume and Background information. Click **Cancel** to only add to the Background information.

You will also receive additional pop-up messages asking if you would like to add the skills, technical skills, and tools associated with this employment history to the individual's existing skills list. Click **OK** if yes; otherwise click **Cancel**.

Added Employment History

Employment History

Company Name	Location	Job Title (Occupation)	Start/End Dates	Action
Target	1280 Dana Dr Redding, CA	Administrative Assistant (Human Resources Assistants, Except Payroll and Timekeeping)	02/03/2014 - 01/14/2017	Edit
				Delete

⏮ ◀ Page 1 ⌄ of 1 ▶ ⏭   Rows: 25 ⌄

[Add Employment History]

Next >>

52

A table then populates with the employment information. Select the <u>Add Employment History</u> link to add additional employment experience.

Once employment information is entered, select the "Next" button to continue.

Next, complete the required fields in the **WIOA Educational Information** of the **Education** tab.

After completing the required fields in the **WIOA Educational Information** section, complete the required fields in the **Education Partner Services** section.

Select the "Next" button to continue.

On the **Public Assistance** tab, complete the **Public Assistance** questions. The questions in this category pertain to the individual *or* a family member of the individual.

If you select the "Yes" radio button for any question, the sub-question located directly below is required to clarify who is receiving that public assistance: the applicant or a family member. In this case, the "Not Applicable/Unknown" radio button is not an acceptable selection, and the system will not allow you to proceed. For example: see the **General Assistance (GA)** question in this slide.

These final questions on the **Public Assistance** page pertain to the individual only.

When the page is completed, select the "Next" button.

On the **Barriers** tab, complete the **Individual Barriers** questions.

After completing the **Individual Barriers** questions, complete the **Barriers to Employment** questions. When the page is completed, select the "Next" button.

Next, please note the text in red on the **Family Income** section of the **Family Income** tab.

In this instance, low income has already been established based on previous entries in the application (Public Assistance tab). **Family Size** and **Annualized Family Income** is not required. Had low income not been established, **Family Size** and **Annualized Family Income** are required entries.

When the page is completed, select the "Next" button.

The **Miscellaneous** tab contains a few additional **Barriers** questions. Answer the required questions, and select the "Next" button to continue.

Finally, the last step of the application, **Eligibility and Grants,** is very important.

Applicant Eligibility table –The green highlight(s) represent the program(s) the individual is eligible for based on all of the entries made in the registration and application to this point. According to the information entered in the system, the individual is not eligible for those programs highlighted in gray/white. If the individual does not show as eligible for a desired program, the application entries should be reviewed to ensure that all questions have been answered appropriately.

The "Priority" column provides the barriers/characteristics of the client that may be used to determine if they qualify for priority of service, but it does not automatically qualify them for priority of service.

Please note: if you select the "Inactive" box in the "Action" column of this table, you will *NOT* have access to that corresponding program, or funding stream, when adding activity codes for your individual.

The **WIOA Grant Eligibility** section is crucial for funding and reporting when serving individuals with WIOA grants. For training purposes, we did not select any of these options because our individual is being served with only Adult formula funds. If you are serving your individual with formula funds only, leave all options as "Not applicable".

However, if you plan to serve your individual with both formula funds and WIOA grant funds (e.g. Workforce Accelerator Funds (WAF)), be sure to select the type of grant here in this section.

Select "Yes" for every WIOA Grant type that you want to access for this individual and program. If the grants are not checked here, they will not show up later as funding options.

The **Non-WIOA Grant** section applies to those Areas who received Non-WIOA grant monies (i.e. Prop 39 and AB2060). If you are *not* providing services to this individual using a Non-WIOA Special Grant, leave the options as "Not Applicable".

Next, the **Grants** section if very important if you are serving this individual with a WIOA special grant. Under the **Grants** section, select the View Available Grants link, and a table will populate showing the grants that are available to your area/location. To attach a grant to this application, locate your grant, then select the Add link on the far right. If you are not serving your individual with a WIOA special grant, skip this section.

If you want to select a grant but there are no grants listed here, please keep in mind the following must be accurate:

- Grant must be active
- Grant code is associated to the local area, based on the LWIA/Region value
- Staff must have access by Eligibility to associate grant types to applications
- The Eligibility Date must fall between the begin/end dates associated to the grant code records

In addition, it may be because the previous section, **WIOA Grant Eligibility**, may not have been completed correctly.

If <u>Add</u> is selected, another table will populate that lists the chosen grant (the one chosen here is just an example). The grants that are selected and shown in the **Grants** table will be available as an option when adding an activity code for a service provided.

If desired, complete the **Staff Eligibility Information** fields. Finally, select the "Finish" button to complete the application.

Note: if you select the "Next" button, you will be routed directly to create Participant for this individual.

You will now see the newly completed Title I application.

Note there is a hyperlink within the gray ribbon that includes the application type, number and status (complete, incomplete, or case closed).

The rest of the gray ribbon includes a summary which identifies the location that completed the application, open/total activities, the application date, participation date, and closure and exit dates.

Objectives

- Completing Individual Registration
- Identifying CalJOBS System Business Rules
- Completing a Title I Application

66

This section of the training will covered the following:

- Completing Individual Registration- entering an individual into the system
- Identifying CalJOBS System Business Rules- understanding some key points in navigating the Title I application
- Completing a Title I application- establishing eligibility for your program

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