

# CalJOBS<sup>SM</sup> Training

## Individual Registration and the Title I Application



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

## Objectives

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

2

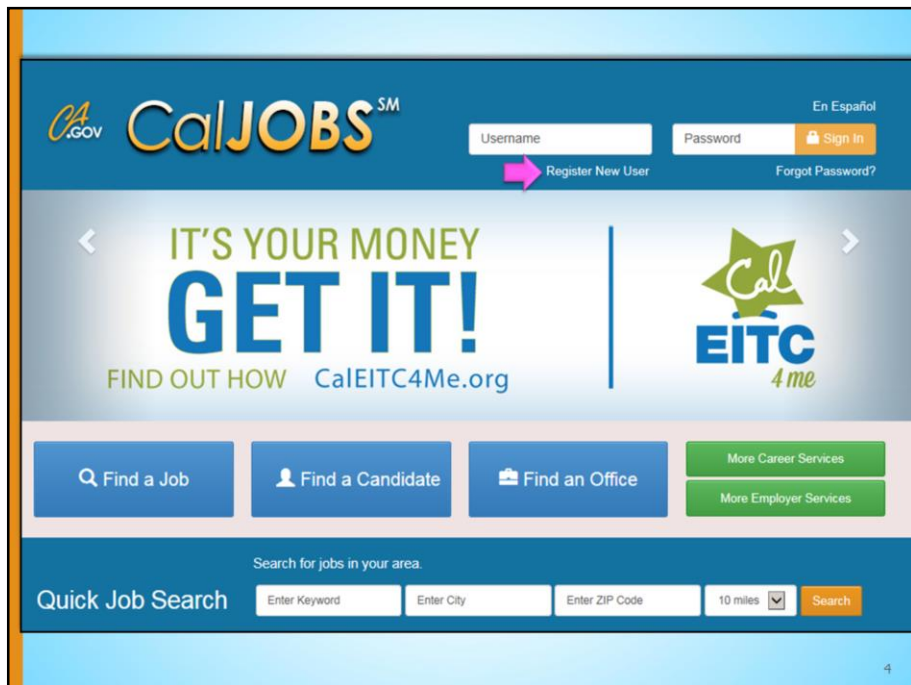
This section of the training will cover the following:

- 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

3

The first step in using CalJOBS is to register the individual you're serving in the system.



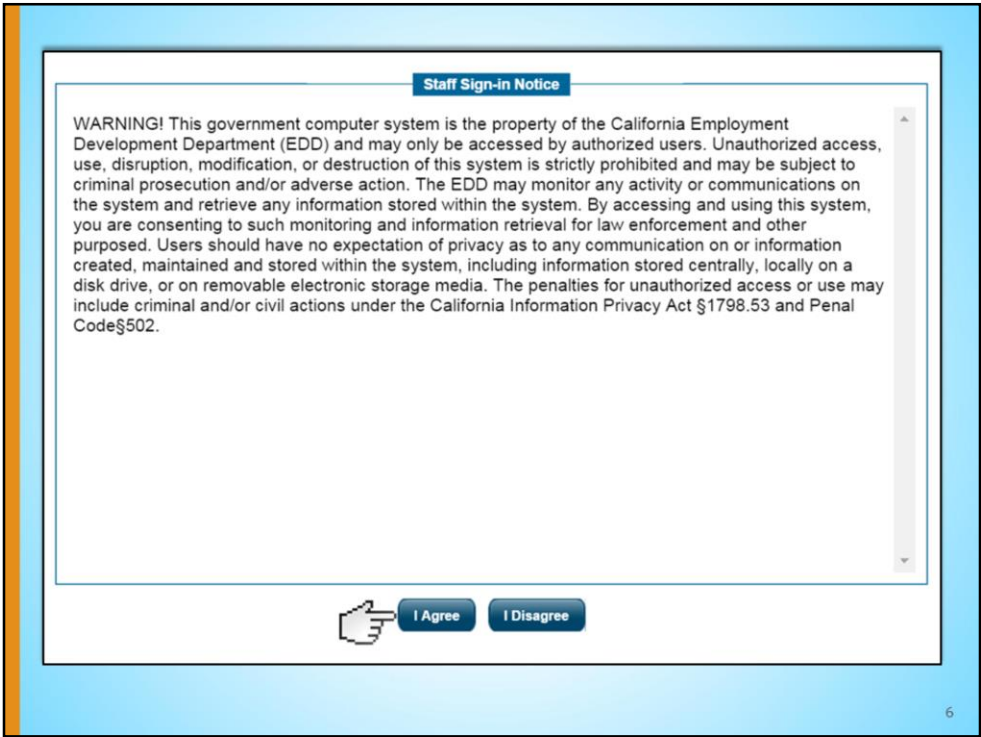
When it comes to registration in CalJOBS, it is encouraged that individuals register themselves in the system. They simply select the Registered New User link at the top right of the home page of [www.caljobs.ca.gov](http://www.caljobs.ca.gov), and follow the instructions to create a user name and password, 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.

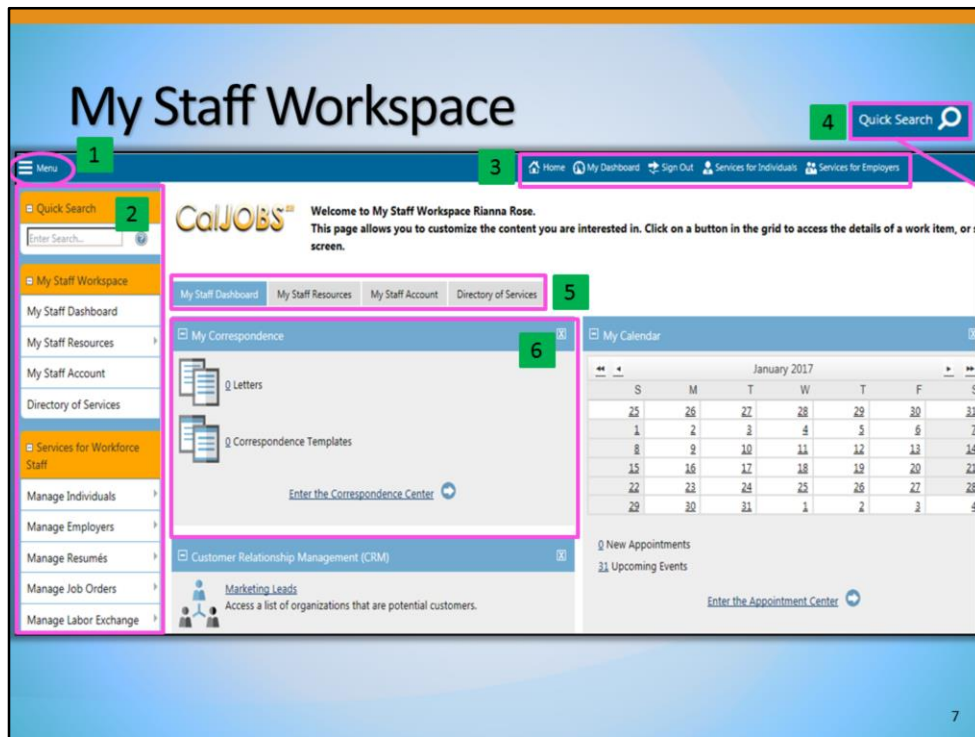


To register an individual, go the [www.caljobs.ca.gov](http://www.caljobs.ca.gov) homepage or “splash page”.

Login by entering your staff information into the fields: Username and Password. Select the “Sign In” button to the right.



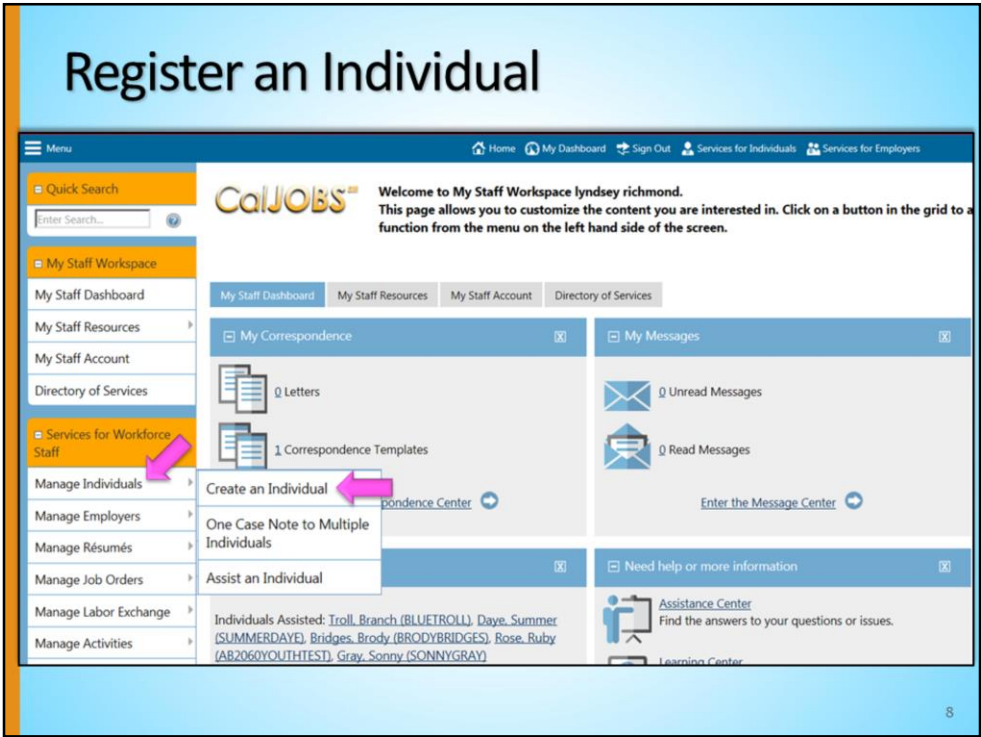
Read the **Staff Sign-in Notice**, select “I Agree”.



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.



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**.



Indicates required fields.

### Login Information

- User Name: 

Enter a unique user name (8 - 256 characters, and must include characters, letters or numbers. Allowable characters are \* @ \_ . Spaces are not allowed.
- Password: 

Enter Password (8 - 20 characters, and must include at least one uppercase letter, one lowercase letter, one number and one special character. Allowable characters are \* @ \$ % ^ & ' " \_ .

Example: Sample1@
- Confirm Password:
- Security Question: 

Last Changed: 8/24/2016 8:50:29 AM, lyndsey richmond
- Security Question Response: 

Special characters are not allowed.

### Social Security Number

- Social Security Number (SSN): 

Do not enter dashes (for example, 999001111)
- Re-enter Social Security Number:

### Primary Location Information

- Country: 

United States
- Please enter your zip code: 

[Find zip code](#)
- Are you authorized to work in the United States? ☒ Yes ☐ No

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”.

**E-mail Address**

Primary E-mail:

[Read Our E-mail Security Policy](#)

Confirm Primary E-mail Address:

**Demographic Information**

• Date of Birth:  (mm/dd/yyyy)

You indicated your date of birth as July 11, 1990.

Age: 26

• Gender: ☐ Female ☒ Male ☐ I do not wish to answer.

• Have you registered with the Selective Service?

[\[ Selective Services web site \]](#)

**Scan Card Information**

Scan Card ID:

None Selected  
Yes  
No  
Documented exemption from registration  
Not applicable

**Next >>**

The **E-mail Address** section is optional, but you may enter the individual's 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.

The screenshot shows a form titled "Name" with a blue header. It contains three input fields: "First Name" with the text "Jane", "Middle Initial" which is empty, and "Last Name" with the text "Test" and a clear button (X). Below the form are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. The entire form is set against a light blue background with an orange vertical bar on the left. A small number "11" is visible in the bottom right corner of the slide.

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

The image shows a screenshot of a web form titled "Residential Address". At the top, there is a section asking "Are you homeless?" with two radio buttons: "Yes" and "No". The "No" button is selected. Below this, a blue link says "This is where you live." The form then contains several fields marked with a red asterisk: "Address Line 1" (containing "1892 20th St."), "Address Line 2" (empty), "Zip Code" (containing "95814" with a "Find zip code" link), "City" (containing "Sacramento"), "State" (a dropdown menu showing "California"), "County / Parish" (a dropdown menu showing "Sacramento County"), "Country" (a dropdown menu showing "United States"), and "State Of Residency" (a dropdown menu showing "California"). A small text label "Apt #, Lot #, Building #, Suite #" is positioned above the "Zip Code" field.

Residential Address

Are you homeless?

☐ Yes ☒ No

[This is where you live.](#)

\* Address Line 1: 1892 20th St.

Address Line 2:

Apt #, Lot #, Building #, Suite #

\* Zip Code: 95814 [Find zip code](#)

\* City: Sacramento

\* State: California

\* County / Parish : Sacramento County

\* Country: United States

State Of Residency: California

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

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

**Mailing Address**

This is where you receive your mail.

**Address has been standardized.**

☒ Use residential address

\* Address Line 1: 1892 20TH ST

Address Line 2:

Apt #, Lot #, Building #, Suite #

\* Zip Code: 95811

\* City: Sacramento

\* State: California

\* Country: United States

<< Back   Next >>

13

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.

The screenshot shows a web form titled "Phone Numbers" with a light blue header and a white content area. The form contains the following fields:

- Primary Phone:** A text input field with the value "555 - 432 - 9999" and an "Ext:" field.
- Primary Phone Type:** A dropdown menu with "Home" selected.
- Alternate Phone:** A text input field with three empty boxes and an "Ext:" field.
- Alternate Phone Type:** A dropdown menu with "None Selected" selected.
- Text Message Cell Phone Number:** A text input field with three empty boxes.
- Fax:** A text input field with three empty boxes.

Below the "Text Message Cell Phone Number" field, there is a small blue italicized note: "Only certain communications such as Virtual Recruiter Alerts can be sent via text message. Normal text messaging rates apply. Other important notices, including some regarding unemployment benefits, will NOT be sent via text message."

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

14

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.

Preferred Notification Method

\* Please select a method in which you prefer to receive your notifications:

None Selected  
Internal Message  
Email  
Text Message (If Available)  
Text Message Notification (If Available)  
Internal Message with Email Notification

Site Access

\* From where are you accessing this website? None Selected

How did you hear about this website? None Selected

<< Back Next >>

15

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.

The image shows a screenshot of a web form with a light blue background. On the left, there is a vertical orange bar. The form contains a section titled "Citizenship" in a blue pill-shaped button. Below this, there is a label "• Citizenship" in red. To the right of the label is a dropdown menu. The dropdown menu is open, showing a list of options: "None Selected" (highlighted in dark blue), "Citizen of U.S. or U.S. Territory", "U.S. Permanent Resident", "Alien/Refugee Lawfully Admitted to U.S.", and "None of the above". A small downward arrow icon is visible on the right side of the dropdown menu.

Citizenship

• Citizenship

None Selected  
Citizen of U.S. or U.S. Territory  
U.S. Permanent Resident  
Alien/Refugee Lawfully Admitted to U.S.  
None of the above

16

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



**Disability**

• Do you have a disability?

☐ Yes, I have a disability.  
☐ No, I do not have a disability.  
☒ I do not wish to answer.

• Are you deaf or do you have serious difficulty hearing?

☐ Yes ☐ No ☐ Not Specified

• Are you blind or do you have serious difficulty seeing even when wearing glasses?

☐ Yes ☐ No ☐ Not Specified

• Because of a physical, mental, or emotional condition, do you have serious difficulty concentrating, remembering, or making decisions?

☐ Yes ☐ No ☐ Not Specified

• Do you have serious difficulty walking or climbing stairs?

☐ Yes ☐ No ☐ Not Specified

• Do you have difficulty dressing or bathing?

☐ Yes ☐ No ☐ Not Specified

Providing this information is optional and refusal to provide disability information will not subject you to any adverse action for additional support services and programs if you have a disability.

• Do you have a disability?

☒ Yes, I have a disability.  
☐ No, I do not have a disability.  
☐ I do not wish to answer.

• Are you receiving Supplemental Security Income (SSI)?

☐ Yes ☐ No

• Are you receiving Social Security Disability Insurance (SSDI)?

☐ Yes ☐ No

<< Back    Next >>

17

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.

The screenshot shows a web form titled "Education Information" with a light blue header. The form contains two mandatory questions, each marked with a red asterisk. The first question, "Your Highest Education Level Achieved:", has a dropdown menu currently set to "None Selected". Below this dropdown is a small blue text instruction: "If you have a High School Diploma or High School Equivalency Diploma, please select the appropriate value of High School Diploma or High School Equivalency Diploma." The second question, "Are you attending school?", also has a dropdown menu set to "None Selected". To the right of the questions are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is highlighted with a pink oval. The page number "18" is located in the bottom right corner of the form area.

Education Information

• Your Highest Education Level Achieved:

If you have a High School Diploma or High School Equivalency Diploma, please select the appropriate value of High School Diploma or High School Equivalency Diploma.

• Are you attending school?

<< Back    Next >>

18

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

When done, select the "Next" button.

**1**

**Unemployment Eligibility Status?**

- UI Referred by Status:
- Claimant has been exempted from work search

**Claimant**  
Exhaustee

None Selected  
WPRS  
REA  
RESEA  
Not Applicable

**Employment Information**

- Current Employment Status: None Selected
- Type of business worked in: None Selected
- Unemployment Eligibility Status? None Selected
- Are you currently looking for work? ☐ Yes ☐ No

Within the last 12 months, have you received a notice of termination or layoff from your job or received documentation that you are separating from military service?

☒ Yes, I have recently received a notice of termination or military separation.

☐ No, I have not recently received a notice of termination or military separation.

**2**

**Farm Worker Information**

- Have you performed work as a farm worker or food processor, including packing houses, nurseries, or orchards, for at least 25 days within the past 12 months? ☒ Yes ☐ No

**3**

Was at least 50% of your income earned from farm work? ☐ Yes ☐ No

Type of National Farm Worker: No

<< Back Next >>

19

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.

**Job Title**

Please enter a job title below. 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.

• What is your desired job title?:

*Your desired job and occupation titles can be changed at any time after registration.*

**Job 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 occupation using the search link.

Suggested occupation(s):

- Cashiers
- Counter and Rental Clerks
- Customer Service Representatives
- Retail Salespersons
- Tellers

• Occupation Title:

• Occupation Code:

<< Back    **Next >>**

20

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.

The screenshot shows a survey form titled "Ethnic Origin" on a light blue background. The form contains two questions:

- Are you of Hispanic or Latino heritage? ☐ Yes ☐ No ☐ I do not wish to answer.
- Race - Please check all that apply:
  - ☐ African American/Black
  - ☐ American Indian/Alaskan Native
  - ☐ Asian
  - ☐ Hawaiian/Other Pacific Islander
  - ☐ White
  - ☐ I do not wish to answer.

At the bottom right of the form, there are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. In the bottom right corner of the slide, the number "21" is visible.

Complete the **Ethnic Origin** section and select the “Next” button.

Military Service

Veterans and their spouses may be entitled to State and Federal Benefits. Please answer the following questions.

- Are you a caregiver who is a spouse or family member to a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit? ☐ Yes ☒ No
- Are you a member of the armed forces who is wounded, ill or injured and receiving treatment in a military facility or warrior transition unit? ☐ Yes ☒ No
- Are you currently in the military, a veteran or the spouse of a veteran? ☒ Yes ☐ No
- Are you the Spouse/Dependent of someone in the active-duty military service, National Guard or Reserves who is currently activated? ☐ Yes ☒ No

**\* Question 1.** Are you within 24 months of retirement or 12 months of discharge from the military (Transitioning Service Member)? ☐ Yes ☒ No

**\* Question 2.** Have you served on active duty in the armed forces and were discharged or released from such service under conditions other than dishonorable? ☒ Yes ☐ No

**\* Question 3.** Are you the spouse of a veteran who has a total service connected disability, is Missing In Action, captured in the line of duty by a hostile force, is a Prisoner Of War or who died from a service connected disability? ☐ Yes ☒ No

**\* Question 4.** Are you now or have you served in a National Guard or Reserve unit that was called to or is on Active Duty due to armed conflict and/or crisis involving national security (Title 10 Activation)? ☐ Yes, I am serving ☐ Yes, I have served ☒ No, I am not serving

22

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:  (mm/dd/yyyy)

\* Military Service End Date:  (mm/dd/yyyy)

\* Received a Military Campaign Badge: ☐ Yes ☒ No

[\[Combat Veteran Web Site\]](#)

\* Branch of Service:

\* Active in the military reserves: ☒ Yes, I am active in the military  
☐ No, I am not active in the military  
☐ Not Specified

\* Most Recent Character of Service Received:

Other Character of Service:

\* Disabled Veteran:

\* Disability Percentage:

\* 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

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

**Public Assistance**

Please provide answers to the following questions if any apply within the last 6 months.

- Has your household received Temporary Assistance for Needy Families (TANF) payments? ☐ Yes ☒ No
- Have you been determined eligible for or received Supplemental Nutritional Assistance Programs Assistance (SNAP formerly known as FoodStamps)? ☐ Yes ☒ No
- Have you received General Assistance Payments? ☐ Yes ☒ No
- Have you received Refugee Cash Assistance Payments? ☐ Yes ☒ No
- Have you been supported through the State's Foster Care System? ☐ Yes ☒ No

☐ I do not wish to provide household information

• Number of individuals living in your household

• Total income earned within the last 6 months

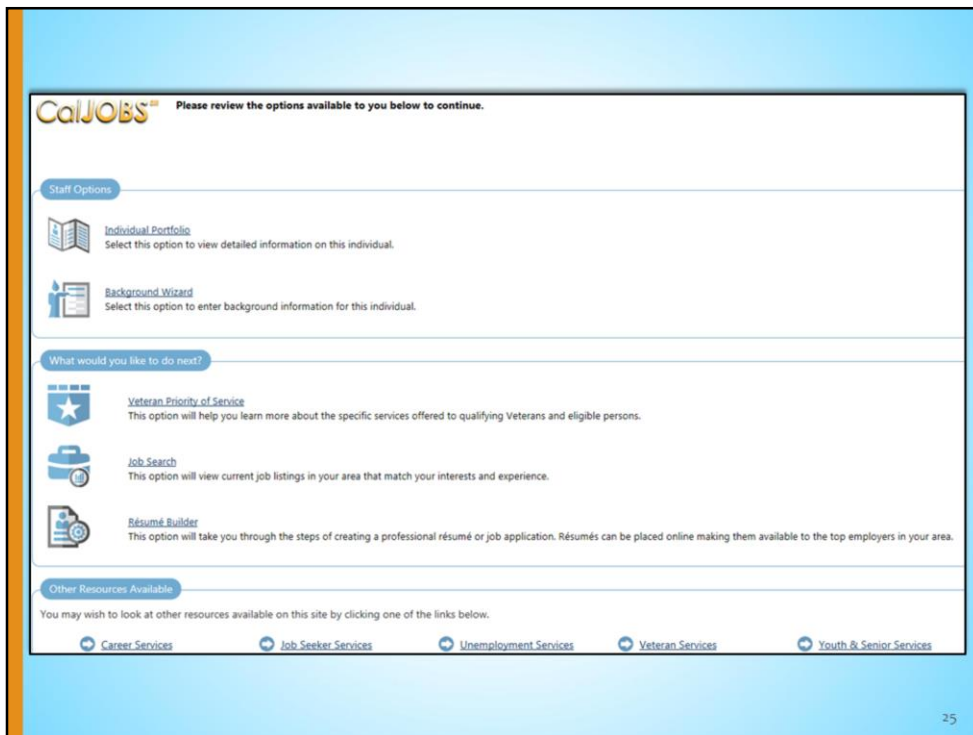
<< Back Finish

24

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

26

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.

# CalJOBS System Business Rules

## “30-day lock-down”

### Application Date

- Cannot be backdated beyond 30 days
- Cannot be greater than today's date

### Eligibility Date

- Cannot precede the application date
- Cannot be greater than today's date



27

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

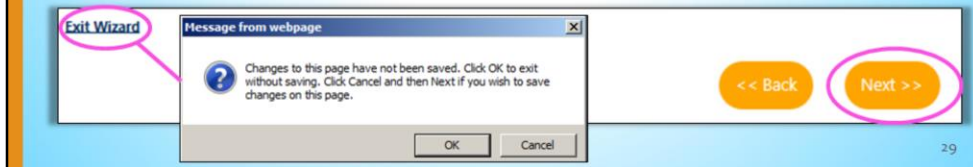
## Exit Wizard vs. “Next”

### 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 Exit Wizard link and the “Next” button.

When Exit Wizard 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

30

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

# 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

Services for Workforce Staff

- Manage Individuals
- Manage Employers
- Manage Resumés
- Manage Job Orders

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 \(SANTAHILPER\)](#), [CalSTRS \(C8032926\)](#), [CALIFORNIA \(SU1\)](#)

Create an Individual

One Case Note to Multiple Individuals

Assist an Individual

My Calendar

January 2017

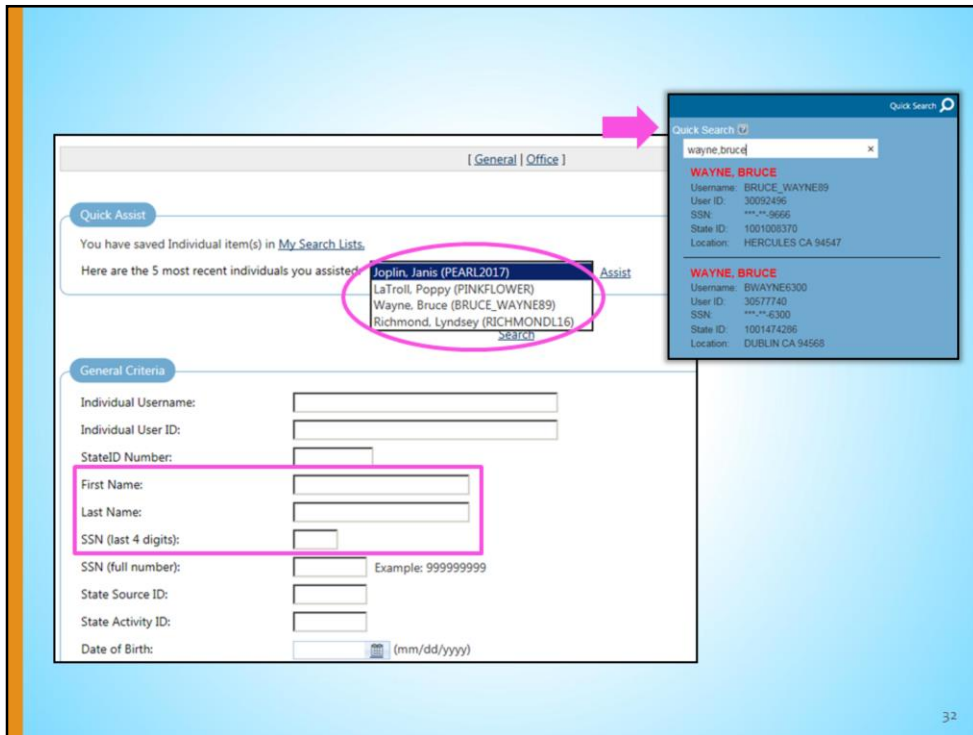
S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

New Appointments  
Upcoming Events

Enter the Appointment Center

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: <b>Summary</b>   <a href="#">Detailed</a>											
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"/>
 SBE VETERAN											
<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"/>
<a href="#">Save New List</a> <a href="#">Update Existing List</a>											
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.

# 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:

Citizen of U.S. or U.S. Territory

USCIS (Alien  
Registration)  
Number:

USCIS (Alien  
Registration)  
Expiration Date:

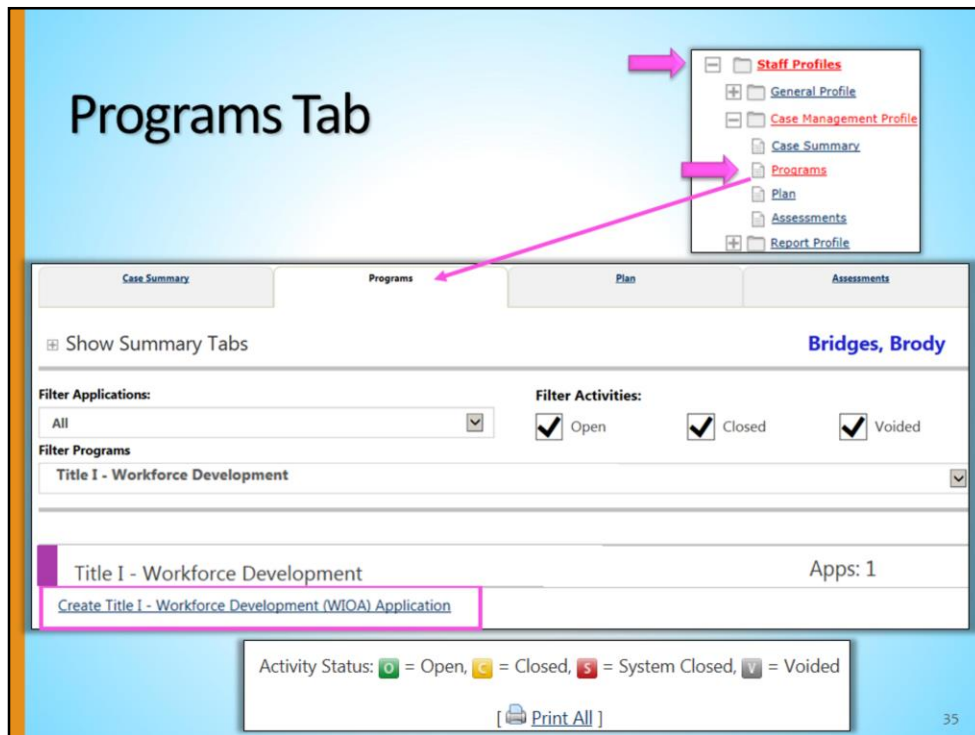
 Today

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.



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.

# WIOA Wizard

Start   Contact   Demographics   Veteran   Employment   Education   Eligibility and Grants

**Identifying Information**

<b>Username/Login Name:</b>	BRODYBRIDGES
<b>User ID:</b>	30707575
<b>State ID:</b>	1001591430
<b>User Account Create Date:</b>	2/6/2017 4:06:05 PM
<b>WIA Converted Application ID:</b>	Not applicable

**Currently Participating In**

Currently participating in the following programs:

<b>Wagner Peyser:</b>	Application Date: 02/06/2017 Participation Date: 02/06/2017
-----------------------	--

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.

The screenshot displays the 'WIOA Wizard' application form. At the top, a progress bar shows steps: Start, Contact, Demographics, Veteran, Employment, Education, and Eligibility and Grants. The 'Start' step is highlighted in yellow.

**Application/Registration Information**

- \* Application Date:** 07/31/2017 (mm/dd/yyyy) Today
- Adult Eligibility:** ☒
- Adult Eligibility Date:** 07/31/2017 (mm/dd/yyyy) Today
- Dislocated Worker Eligibility:** ☐
- Youth Eligibility:** ☐
- Incumbent Worker Eligibility:** ☐

**Location Information**

- \* Local Area/Region:** Your Local Area/Region
- \* Office Location of Responsibility:** Your Organization Office
- \* Office Location:** Your Organization Office
- Agency Code:** [Agency Code Search](#)

At the bottom right, there is a 'Next >>' button and a page number '37'.

**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 [Agency Code Search](#) 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.

**WIOA Wizard**

Start **Contact** Demographics Veteran Employment

Education Public Assistance Barriers Family Income Miscellaneous

Eligibility and Grants

**Contact Information**

\* First Name:

Middle Initial:

\* Last Name (including suffix e.g. Jr., Sr., PhD, etc.):

\* SSN (do not enter dashes. eg: 999999999):  [\[Edit SSN\]](#)

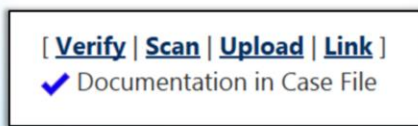
[Verify](#) [Scan](#) [Upload](#) [Link](#)

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"



39

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.

The screenshot shows a 'Mailing Address' form within a light blue bordered window. At the top left of the form is a blue pill-shaped button labeled 'Mailing Address'. Below this button are two unchecked checkboxes: 'Staff has reviewed this address for correctness' and 'Check here to use the residential address information'. The form contains several labeled input fields, each with a red asterisk indicating it is required. The fields are: 'Mail Address 1' with the text '555 Sunshine Ln', 'Mail Address 2' which is empty, 'Mailing City' with the text 'Redding', 'Mailing State' with a dropdown menu showing 'California', 'Mailing Zip/Postal Code' with the text '96001', and 'Mailing Country' with a dropdown menu showing 'United States'. The entire form is set against a white background.

Mailing Address

☐ Staff has reviewed this address for correctness

☐ Check here to use the residential address information

\* Mail Address 1: 555 Sunshine Ln

Mail Address 2:

\* Mailing City: Redding

\* Mailing State: California

\* Mailing Zip/Postal Code: 96001

\* Mailing Country: United States

41

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 is 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.”

The screenshot shows a web application interface with a light blue background and a white content area. At the top, there is a tab labeled "Alternate Contacts". Below this tab, there is a link "Manage Alternate Contacts". Underneath, a section titled "Contact List" displays the message "No Contacts for individual". Below the contact list, there is a section titled "Case Assignment". This section contains a table with two columns. The first column is labeled "Current Case Manager:" and is empty. The second column contains the text "Case currently Not Assigned to a Case Manager" followed by three links: "Assign Case Manager", "Assign Me", and "Remove Case Manager Assignment". Below the table, there is a checkbox labeled "Check here to allow saving of a partial application". At the bottom left, there is a link "Exit Wizard". At the bottom right, there are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is circled in pink. In the bottom right corner of the page, there is a small number "42".

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.

WIOA Wizard

Start Contact **Demographics** Veteran Employment Education Public Assistance

Barriers Family Income Miscellaneous Eligibility and Grants

**Demographic Information**

[Edit Date of Birth](#)

\* **Date of Birth:** 07/08/1993

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

✓ Documentation in Case File

**Age at Earliest Eligibility:** 23 (Today's Age: 23)

\* **Gender:** ☒ Male ☐ Female ☐ Did not self-identify

[Selective Service Website](#)

**Registered for the Selective Service:** Yes

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

✓ Documentation in Case File


**Selective Service Registration Number:**

**Selective Service Registration Date:**

43

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.

• **Authorization to Work in US:**    
[\[ Verify | Scan | Upload | Link \]](#)  
✓ Documentation in Case File

• **Considered to be of Hispanic heritage:** ☐ Yes ☒ No

• **Race - Ethnicity:**  
☐ African American/Black  
☐ American Indian/Alaskan Native  
☐ Asian  
☐ Hawaiian/Other Pacific Islander  
☐ White  
☒ I do not wish to answer.

• **Considered to have a disability:** ☐ Yes ☒ No ☐ Participant did not self-identify ☐ Chose not to identify  
[\[ Verify | Scan | Upload | Link \]](#)

**Category of Disability :**  
☐ No disability  
☐ Physical/Chronic Health Condition  
☐ Physical/Mobility Impairment  
☐ Mental or Psychiatric Disability  
☐ Vision-related disability  
☐ Hearing-related disability  
☐ Learning Disability  
☐ Cognitive/Intellectual disability  
☐ Participant did not disclose type of disability

[Next >>](#)

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

The screenshot displays the 'WIOA Wizard' interface. At the top, a progress bar shows six steps: Start, Contact, Demographics, Veteran, Employment, and Education. The 'Start' step is completed with a green checkmark. The 'Contact' step is also completed with a green checkmark. The 'Demographics' step is completed with a green checkmark. The 'Veteran' step is currently active, indicated by a yellow highlight and a yellow circle with a downward arrow. Below the progress bar, there are two rows of sub-steps: 'Public Assistance', 'Barriers', 'Family Income', 'Miscellaneous', 'Eligibility and Grants', and 'Education'. The 'Public Assistance', 'Barriers', 'Family Income', 'Miscellaneous', and 'Eligibility and Grants' sub-steps are marked with an 'X'. The 'Education' sub-step is also marked with an 'X'. Below the progress bar, there is a section titled 'Transitioning Service Member' with a blue header. This section contains three fields: 'Transitioning Service Member:' with radio buttons for 'Yes' and 'No' (the 'No' button is selected), 'Type of Transitioning Service Member:' with a dropdown menu showing 'None Selected', and 'Estimated Discharge Date:' with a date input field showing '(mm/dd/yyyy)' and a 'Today' button.

WIOA Wizard

Start Contact Demographics **Veteran** Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants Education

Transitioning Service Member

• Transitioning Service Member: ☐ Yes ☒ No

Type of Transitioning Service Member: None Selected

Estimated Discharge Date: (mm/dd/yyyy) Today

45

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.

WIOA Wizard

Start Contact Demographics **Veteran** Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

**Veteran Information**

**\*Eligible Veteran Status:**

☐ Yes <= 180 days

☒ Yes, Eligible Veteran

☐ Yes, Other Eligible Person

☐ No

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

[Obtain DD214](#)

**\*Served more than 1 tour of duty:**

☐ Yes ☒ No

**\*Military Service Entry Date:**  (mm/dd/yyyy)

**\*Military Service Discharge Date:**  (mm/dd/yyyy)

**\*Disabled Veteran:**

**Homeless Veteran:**

☐ Yes ☒ No

**Received Services from Veterans Vocational Rehabilitation:**

☐ Yes ☒ No ☐ Unknown

**Next >>**

46

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.

**WIOA Wizard**

Start ☒ Contact ☒ Demographics ☒ Veteran ☒ **Employment** ☒ Education ☒ Public Assistance ☒

Barriers ☒ Family Income ☒ Miscellaneous ☒ Eligibility and Grants ☒

---

**Employment Information**

• **Employment Status:**  [\[ Verify | Scan | Upload | Link \]](#)

• **If Employed, Individual is Under-Employed:** ☐ Yes ☐ No ☒ Not Applicable

• **Unemployment Eligibility Status:**  [\[ Verify | Scan | Upload | Link \]](#)

**UI Referred By Status:**  [\[ Verify | Scan | Upload | Link \]](#)

**Claimant has been exempted from work search:** ☐ Yes ☐ No

**Date claimant was exempted from work search:**  [Today](#)

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

47

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.



**WIOA Wizard**

Start Contact Demographics Veteran **Employment** Education Public Assistance

Barriers Family Income Miscellaneous Eligibility and Grants

Number of Weeks Unemployed:

Long-term Unemployed (27 or more consecutive weeks): ☐ Yes ☒ No

*Please enter the Wage and Onet Code for all applicants with current/previous employment.*

Current or Most Recent Hourly Rate of Pay:

[Search Onet](#)

Occupation of Most Recent Employment Prior to WIA/WIOA participation (if available): -

**Employment History**

Company Name	City	Job Title (Occupation)	Start/End Dates	Action
No Employment History				

[Add Employment History](#)

**Next >>**

48

Although there is not a red asterisk next to the **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:   
 Address:   
 Store / Location Number:   
 Zip Code:   
 \* City:   
 \* State / Province:   
 \* Country:

**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:

**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 occupation.

Suggested occupation(s):

[\[ Search for an occupation \]](#)

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

When the Add Employment History 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 Search for an occupation link to find the correct occupation.

Complete the other required sections.

Position

Type of employment:

Regular

Full or part-time:

Full Time (30 Hours or More)

Gross Salary:

\$18.00

Salary is based upon:

Hour

Date you began work:

02/03/2014 (mm/dd/yyyy)

Last day worked:

01/14/2017 (mm/dd/yyyy)

You indicated the date as January 14, 2017

☐ Currently Employed

Duration of Job

2 Year(s) 11 Month(s)

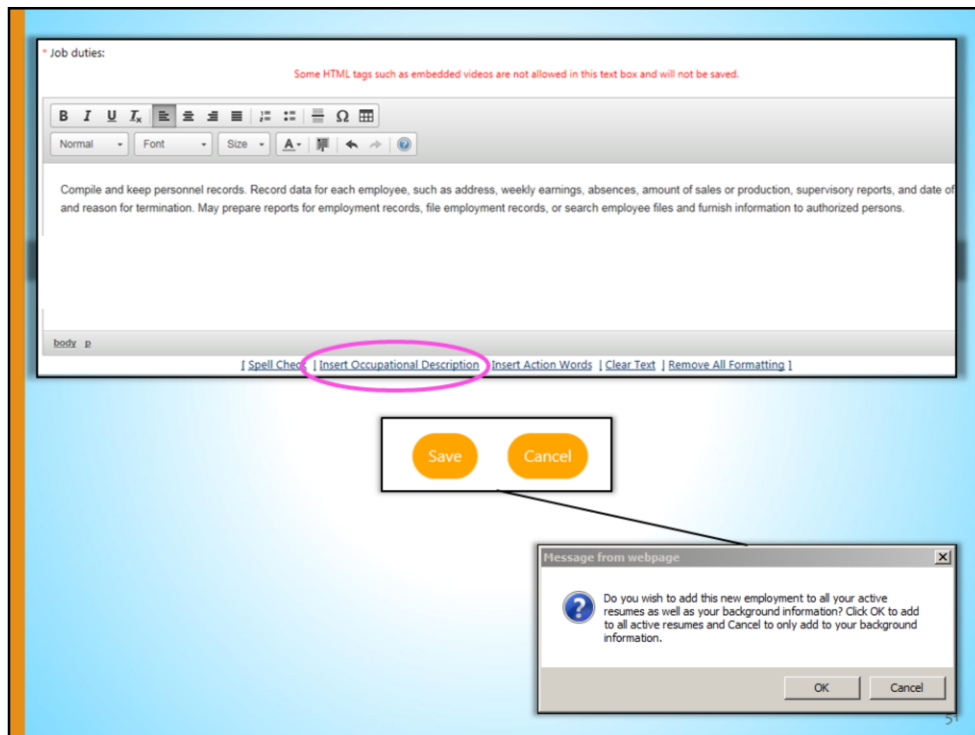
Reason for Separation:

Layoff

Additional information on reason for separation:

(120 characters max)

Complete the required **Position** information.



Complete the Job duties summary. Job duties can either be typed in, or selected from the [Insert Occupational Description](#) 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
<a href="#">Target</a>	1280 Dana Dr Redding, CA	Administrative Assistant (Human Resources Assistants, Except Payroll and Timekeeping)	02/03/2014 - 01/14/2017	<a href="#">Edit</a> <a href="#">Delete</a>

Page 1 of 1 Rows: 25

[\[Add Employment History\]](#)



A table then populates with the employment information. Select the [Add Employment History](#) link to add additional employment experience.

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

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

WIOA Education Information

- Highest School Grade Completed: 12th Grade Completed
- High School Diploma or equivalent received: ☒ Yes ☐ No
- Highest Education Level completed: Attained an Associate's degree
- [Verify](#) [Scan](#) [Upload](#) [Link](#)
- School Status: Not attending school: Secondary School Graduate or has a recognized equivalent
- [Verify](#) [Scan](#) [Upload](#) [Link](#)

53

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

The screenshot shows a web-based form titled "Education Partner Services" within a larger application window. At the top, a progress bar indicates the user's progress through several steps: Start, Contact, Demographics, Veteran, Employment, and Education. The "Education" step is currently active, indicated by a yellow circle. Below the progress bar, the form contains several sections with radio button options:

- Receiving services from Adult Education (WIOA Title II):** ☐ Yes ☐ No ☒ Did not self-identify
- Receiving services from YouthBuild:** ☐ Yes ☐ No ☒ Did not self-identify
- YouthBuild Grant Number (If unknown, enter all 9s.):** [Text input field]
- Format:** AA-99999-99-99-A-99
- Receiving services from Job Corps:** ☐ Yes ☐ No ☒ Did not self-identify
- Receiving Services from Vocational Education (Carl Perkins):** ☐ Yes ☐ No ☒ Did not self-identify
- Individualized Education Program Participant:** [Dropdown menu showing "Not Applicable"]

At the bottom of the form, there are two orange buttons: "<< Back" and "Next >>". The "Next >>" button is highlighted with a pink circle, indicating it is the next step to be taken.

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.

**WIOA Wizard**

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

**Public Assistance**

*Individual or member of a family that is receiving, or in the past 6 months has received, the following:*

- Temporary Assistance for Needy Families (TANF): ☐ Yes ☒ No  
 TANF Recipient: ☐ Applicant ☐ Family Member ☐ Not Applicable/Unknown  
[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#)
- Supplemental Security Income (SSI): ☐ Yes ☒ No  
 SSI Recipient: ☐ Applicant ☐ Family Member ☐ Not Applicable/Unknown  
[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#)
- General Assistance (GA): ☒ Yes ☐ No  
 GA Recipient: ☒ Applicant ☐ Family Member ☐ Not Applicable/Unknown  
[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#)
- Supplemental Nutrition Assistance Program (SNAP): ☐ Yes ☒ No  
[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#)
- Refugee Cash Assistance (RCA): ☐ Yes ☒ No  
 RCA Recipient: ☐ Applicant ☐ Family Member ☐ Not Applicable/Unknown  
[\[ Verify \]](#) [\[ Scan \]](#) [\[ Upload \]](#) [\[ Link \]](#)

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.



WIOA Wizard

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

*Individual receives, or in the last 6 months, received:*

• **Social Security Disability Insurance Income (SSDI):** ☐ Yes ☒ No

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

*Individual currently meets the following:*

• **Receiving services under SNAP Employment & Training Program:** ☐ Yes ☒ No

• **Receiving, or has been notified will receive, Pell Grant:** ☐ Yes ☒ No

• **Ticket to Work Holder issued by the Social Security Administration:** ☐ Yes ☒ No

<< Back Next >>

56

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

When the page is completed, select the “Next” button.

**WIOA Wizard**

Start
Contact
Demographics
Veteran
Employment
Education

Public Assistance
Barriers
Family Income
Miscellaneous
Eligibility and Grants

Individual Barriers

▪ **English language learner** ☐ Yes ☒ No  
[\[ Verify | Scan | Upload | Link \]](#)

▪ **Basic Skills Deficient/Low Levels of Literacy** ☐ Yes ☒ No  
[\[ Verify | Scan | Upload | Link \]](#)

Add//View Basic skills scores: [Click Here](#)

▪ **Homeless:** ☐ Yes ☒ No  
[\[ Verify | Scan | Upload | Link \]](#)

▪ **Ex-Offender - individual has been arrested/convicted of a crime:** ☐ Yes ☒ No ☐ Did not disclose  
[\[ Verify | Scan | Upload | Link \]](#)

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

**WIOA Wizard**

Start
Contact
Demographics
Veteran
Employment
Education

Public Assistance
Barriers
Family Income
Miscellaneous
Eligibility and Grants

**Barriers to Employment**

Disabled: ☐ No

• Displaced Homemaker:  [Verify](#) | [Scan](#) | [Upload](#) | [Link](#)

Meets long term unemployment definition: ☐ No

• Within 2 years of exhausting TANF lifetime eligibility: ☐ Yes ☒ No

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

Older individual (age 55 and older): ☐ No

• Hawaiian Native: ☐ Yes ☒ No

Hawaiian or Pacific Islander is not selected as a Race for this individual. Please update the Demographics section if this is not accurate.

• American Indian/Alaskan Native: ☐ No

• Single Parent (including single pregnant women): ☐ Yes ☒ No ☐ Participant did not self-identify

• Cultural Barriers: ☐ Yes ☒ No ☐ Participant did not self-identify

• Eligible Migrant Season Farmworker as defined in WIOA Sec 167(i): ☐ Yes ☒ No

• Meets Governor's special barriers to employment: ☐ Yes ☒ No

[<< Back](#)

[Next >>](#)

5

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

WIOA Wizard

Start Contact Demographics Veteran Employment Education Public Assistance

Barriers Family Income Miscellaneous Eligibility and Grants

**Family Income**

• Due to the individual's disability, they qualify as a Family of 1: ☐ Yes ☒ No

Low income has already been established based upon previous entries. Family size and income are optional.

Family Size:  [Verify] [Scan] [Upload] [Link]

Annualized Family Income:  [Verify] [Scan] [Upload] [Link]

[Income Table](#)

<< Back Next >>

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.

WIOA Wizard

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

Barriers

• Gang Status:

• Youth of Incarcerated Parent: ☐ Yes ☒ No

Parole Number:

• Substance Abuse: ☐ Yes ☒ No

<< Back Next >>

60

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

**WIOA Wizard**

Start ✓
Contact ✓
Demographics ✓
Veteran ✓
Employment ✓
Education ✓

Public Assistance ✓
Barriers ✓
Family Income ✓
Miscellaneous ✓
Eligibility and Grants

**Applicant Eligibility**

**Applicant meets the definition for low income:** Yes

**Income Table:** [Income Table](#)

Program	Eligible	Priority	Calculated Exception/Limitation	Reason(s) Not Eligible	Action
Adult	Yes	VET, LI			<input type="checkbox"/> Inactive
Dislocated Worker	Undetermined			No DW Eligibility Date.	<input type="checkbox"/> Inactive
Youth	Undetermined			No Youth Eligibility Date.	<input type="checkbox"/> Inactive

VET = Veteran, BSD = Basic Skills Deficient, PA = Public Assistance, LI = Low Income, SLP = Additional Priorities

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.

**WIOA Wizard**

Start Contact Demographics Veteran Employment Education

Public Assistance Barriers Family Income Miscellaneous Eligibility and Grants

**WIOA Grant Eligibility**

*Changes in this section will create immediate updates to the record.*

**Incumbent Worker Eligibility:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive  
 Applicant does not meet the requirements for Incumbent Worker eligibility.

**National Dislocated Worker Grant NDWG:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive  
 Applicant does not meet the requirements for NDWG eligibility.

**Statewide Adult Eligibility:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

**Statewide Dislocated Worker Eligibility:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive  
 Applicant does not meet the requirements for Statewide Dislocated Worker eligibility.

**Statewide Youth Eligibility:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive  
 Applicant does not meet the requirements for Statewide Youth eligibility.

**Statewide Rapid Response Additional Assistance Eligibility:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive  
 Applicant does not meet the requirements for Statewide Rapid Response Additional Assistance eligibility.

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.

**WIOA Wizard**

Start ☒ Contact ☒ Demographics ☒ Veteran ☒ Employment ☒ Education ☒

Public Assistance ☒ Barriers ☒ Family Income ☒ Miscellaneous ☒ Eligibility and Grants ☒

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**Non-WIOA Grants**

**Non-WIOA Special Grants:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

**Local Funded Grants:** ☐ Yes ☐ No ☒ Not Applicable ☐ Inactive

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**Grants**

Grant Type	Grant ID	Grant Name	ETA/Local Grant Code	Date Added	Action
No records found					

[View Available Grants](#)

**Grants**

No grants have been added.

Select from the list of available grants.

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Adult	377	1096 - High Road Training Partnerships	NA		<a href="#">Add</a>

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 is 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.

The screenshot shows a web application interface for staff eligibility information. At the top, there is a 'Grants' section with a table listing available grants. Below this is the 'Staff Eligibility Information' section, which includes a 'Current Case Manager' field with a message indicating the case is not assigned to a manager and links to 'Assign Case Manager', 'Assign Me', and 'Remove Case Manager Assignment'. There is also a 'Comments' section with a text area and a 'Spell Check' link. At the bottom, there is a navigation bar with three buttons: '<< Back', 'Next >>', and 'Finish'. The 'Finish' button is circled in pink.

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
Statewide Adult	377	1096 - High Road Training Partnerships	NA		<a href="#">Add</a>

[View Available Grants](#)

**Staff Eligibility Information**

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

**Comments:**

[ [Spell Check](#) ]

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

ID	Create Date	Subject	Action
No data found.			

<< Back   Next >>   **Finish**

64

If [Add](#) 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.

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

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

WIOA #15696306 - Complete

LWSA:	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

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

# Questions



67

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