



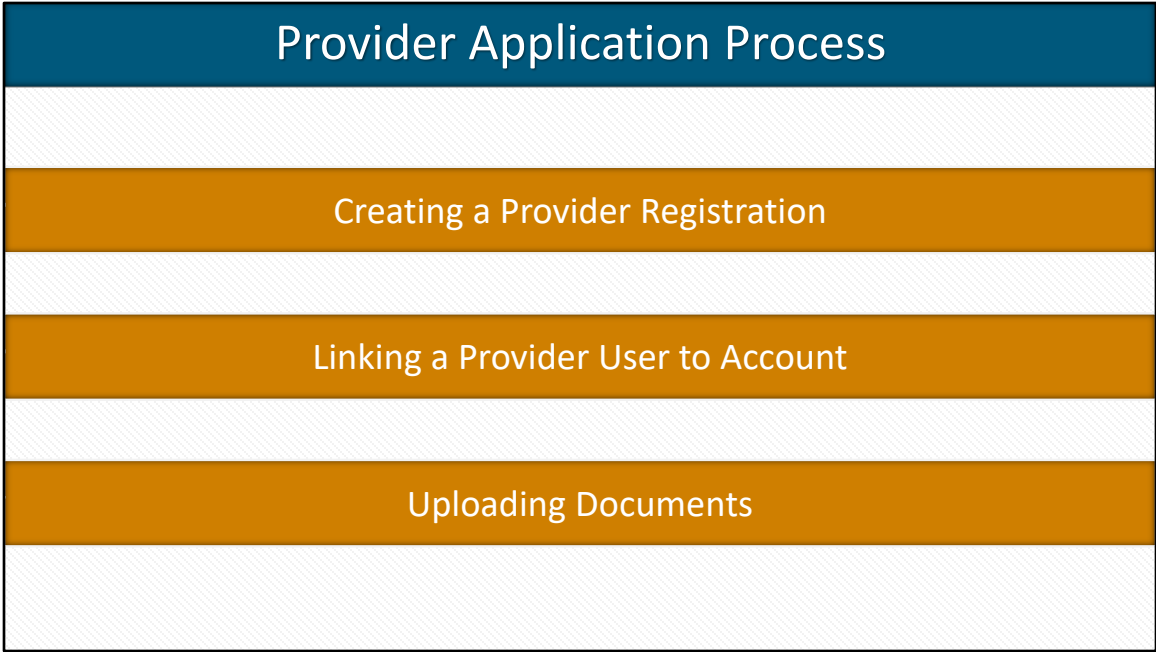
Creating a Provider Institution (Staff View)

Monica:

Hello, and welcome back to our training series on the CalJOBS Provider Module. This recording will provide information to staff about the Provider Initial Eligibility.

It's important to understand what information is needed to list a provider on the CA ETPL. As well as, how to link provider users and upload necessary documents needed for an ETPL provider.

Let's go ahead and explore how to initially list a training provider into CalJOBS.



Monica:

The Provider Application Process is where a provider is entered and evaluated for eligibility. We will explore the following items within the CalJOBS system:

So let' begin the training with how to create a Provider Registration.

Creating a Provider Institution

	Organization Name
	Organization Address
	Name of Company Official
	FEID

3

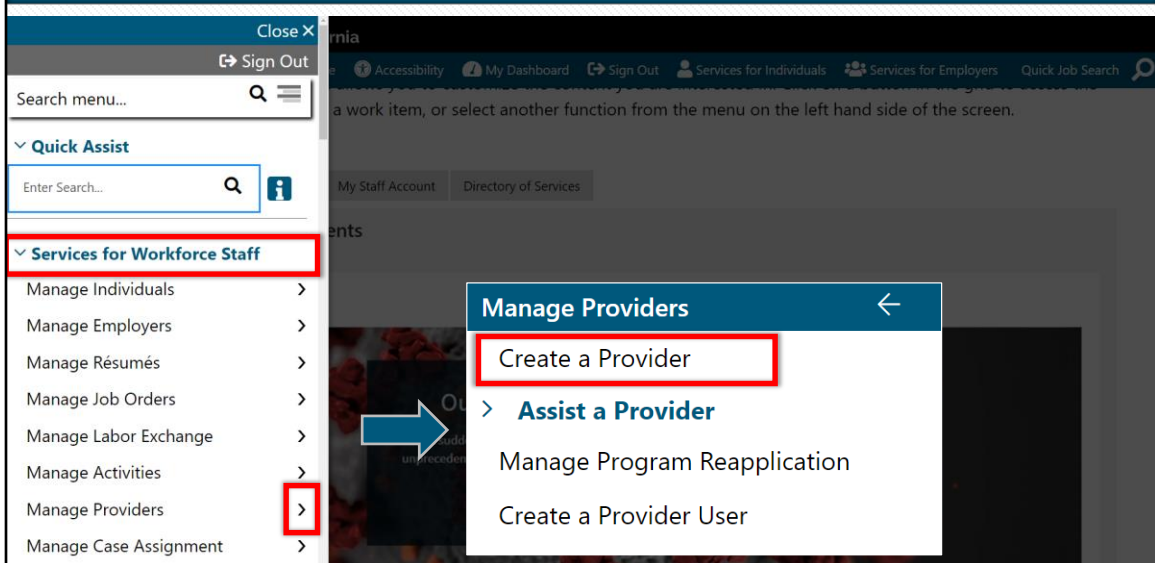
Monica:

When staff create a provider account, you will need the following information
company name, primary location address,
first and last name of a company official, and the Federal Employer
Identification Number also know as the FEID.

Once you can obtain the information, you're ready to begin creating a provider
registration account in the system.

Let's begin the step-by-step provider registration.

Step 1 – Create a Provider




Monica:

The first step after signing into CalJOBS, would be to click the Menu button which is located on the top left hand side of the screen. From here, the Menu window will appear and staff will then need to locate the **Services for Workforce Staff** submenu, the **Manage Providers** arrow, which will open a new fly out menu. From here, staff would need to select the → **Create a Provider** option.

Step 2 – Provider Information

Provider Information



*** Status:** ☒ Active ☐ Inactive

*** LWIA Region:** State

Linked Employer: [[Search For Employer](#)]

*** Vendor ID:** Generated by algorithm

*** FEID:**

*** Provider Name 1:**

Provider Name 2:

Monica:

CalJOBS will navigate staff to a page where you will complete the provider information that is required to complete registration.

In the **Provider Information** section, the system will set the status of the provider to **[Animation] Active**. In addition, the LWIA Region will default to **[Animation] State**. Please note this field cannot be changed once you click Save at the bottom of the page.

Next, fill out the provider **[Animation] FEID**, followed by the **[Animation] Provider Name**.

Step 2 – Provider Information (cont.)

* Address 1:

Address 2:

* Zip:

Note: By entering the Zip Code first, the system will automatically populate the City and State fields.

* City:

* State:

Monica:

The next required fields are the **[Animation]** Address, **[Animation]** Zip Code, please note once you enter the Zip Code, the system will automatically populate the **[Animation]** City and State fields.

Step 2 – Provider Information (cont.)

* **Type of Entity:**

* **This provider is an accredited postsecondary education institution:**

Registered Apprenticeship Provider:

Approved Apprenticeship:

Private For-Profit ▼

None Selected
Higher Ed: Associate's Degree
Higher Ed: Baccalaureate or Higher
Higher Ed: Certificate of Completion
National Apprenticeship
Private Non-Profit
Private For-Profit
Public
Other

Monica:

Next, staff will need to select the appropriate option from the **Type of Entity** drop down menu. In this case we will say that this Type of Entity we are entering into CalJOBS is a Private For-Profit institution.

[Animation] In order for a provider to be on the ETPL, the provider must be an accredited postsecondary education institution, **[Animation]** so we will select the **Yes** radio button.

Step 3 – Billing Address Information

Billing Address Information

Populate the Billing Address from: [Provider's Main Address](#)

* Billing Address 1:

750 Capitol Ave

Billing Address 2:

* Billing Zip:

95814

* Billing City:

Sacramento

* Billing State:

California ▼

* Attention:

Monica:

The next section of the provider profile is the Billing Address Information. If the Billing Address is the same as the Main Address, **[Animation]** staff can select the link to populate the information. Next, staff must enter a company representative's name in the Attention Box. In this example, we will use Maria Garcia. **[Animation]**

Step 4 – Mailing Address Information

Mailing Address Information

Populate the Mailing Address from: [Provider's Main Address](#) | [Provider's Billing Address](#)

* Mailing Address 1:

750 Capitol Ave

Mailing Address 2:

* Mailing Zip:

95814

* Mailing City:

Sacramento

* Mailing State:

California ▼

* Mailing Attention:

Save

Cancel

Monica:

The next section Mailing Address Information works the same as the Billing Address section. **[Animation]**

This time, staff have the option to use the Provider's Main Address or Provider's Billing Address. Lastly, staff must enter a representative's name in the Mailing Attention box. **[Animation]**

Once all of the required fields are completed, **[Animation]** click Save.

Step 5 – Provider Type Details

Provider Type Details

[Show All](#)



[Contract Services \(CS\)](#)

[Program Services \(PS\)](#)


[Support Services \(SS\)](#)

Monica:

Once you click on the save button, the system will navigate staff to a new page. On the **Provider Type Details** Screen, **[Animation]** click **Show All** to expand the links.

Step 5 – Provider Type Details (cont.)

<input checked="" type="checkbox"/> PS - Approved Provider Training - ITA	
300 Occupational Skills Training (Approved ETPL Provider)	
302 Entrepreneurial Training	
303 Distance Learning (TAA)	
305 Skills Upgrading and Retraining	
306 WIOA Prerequisite Trainings	
307 Pre-Apprenticeship Program w/Occupational Skills Training (ITA)	
311 Placed in Job Corps	
320 Private Sector Training	
323 Workplace Training & Cooperative Education	
324 Adult Education with Training Services	
325 Apprenticeship Training	
342 Approved Prerequisite Training (TAA)	
347 Occupational Skills Training (Approved ETPL Provider) (TAA)	
350 Pre-Apprenticeship Program w/Occupational Skills Training (ITA) (TAA)	
351 Adult Education with Training Services (TAA)	
352 Apprenticeship Training (TAA)	
416 Occupational Skills Training (Approved ETPL Provider)	
437 Pre-Apprenticeship Program with Occupational Skills Training (ITA)	
<input checked="" type="checkbox"/> PS - Education and Training Programs	

 Save Cancel

Monica:

Once the links have been expanded and opened, under **Program Services**, choose the following Provider Types: **[Animation] “PS – Approved Provider Training – ITA”** and **“PS – Education and Training Programs”**. This shows what activity codes will be linked to this provider. You are also able to select other Provider Types, if the corresponding activity codes make sense for the provider.

Once you are done selecting Provider Types, **[Animation]** click Save.

Step 6 – Additional Provider Details Section

The screenshot shows a web interface for a provider profile. At the top, there are three tabs: "Provider Profile" (selected), "Provider Programs", and "Provider Activities". Below these are six sub-tabs: "General" (selected), "Locations", "Contacts", "Users", "Case Notes", and "Documents". The "General" tab displays the provider's name "Carroll Institution" and a section titled "Provider Details". This section contains a table with the following information:

Status:	Active
LWIA Region:	State
Linked Employer:	N/A
Vendor ID:	852654333
Provider Name 1:	Carroll Institution
Provider Name 2:	
Address 1:	750 Capitol Ave
Address 2:	

Below the table, there are two links: "[Edit Additional Provider Details]" and "[View Additional Provider History]". A blue arrow points from the "Edit Additional Provider Details" link to a text box that says "Return to My Dashboard". A callout box with a blue background and white text says: "Scroll down in the General Information tab and within the Additional Provider Details Section, click Edit Additional Provider Details link."

Monica:

Once you click save, the system will direct staff to the General Information tab.

[Animation] Once here, staff will need to scroll down the page and within the **[Animation]** **Additional Provider Details section**, click the **Edit Additional Provider Details** link.

Step 6 – Additional Provider Details Section (cont.)

Additional Provider Information	
Institution Name:	Carroll Institution
Institution Code:	The Institution code will be created.
* Institution Area:	<div>Sacramento County</div>
Years in Business:	<div></div>
* ADA Compliant:	<input checked="" type="radio"/> Yes <input type="radio"/> No
* Institution Description:	<div>The role of the School Service Provider is to facilitate, assess and support instructional programs for students in general and special education; provide training and work</div> <div>(2000 characters max.)</div>
Agency Code:	<div></div> [Search For Agency Code]
Performance Reporting Method:	Aggregate

Monica:

Now, staff need to enter in data for the following required fields. **[Animation]** The first required field is the **Institution Area** question, staff will need to select the county the institution is located in. For this example, we have selected Sacramento County.

In order to comply with EEO and WIOA requirements, providers must be ADA compliant. **[Animation]** So in this case, we will select the **Yes** radio button.

[Animation] Lastly, staff must enter a description for the institution. Typically, you can gather the description from the institution's website.

Step 6 – Additional Provider Details Section (cont.)

* Main Telephone Number:	<input type="text"/> - <input type="text"/> - <input type="text"/>
TTD/TTY Telephone Number:	<input type="text"/> - <input type="text"/> - <input type="text"/>
Financial Aid Telephone Number:	<input type="text"/> - <input type="text"/> - <input type="text"/>
Main Email Address:	<input type="text"/>
* Display Online to the public?	<input checked="" type="radio"/> Yes <input type="radio"/> No
* Accreditation / Approval	<input checked="" type="radio"/> Yes <input type="radio"/> No
Accrediting / Approving Body:	<div>None Selected ▾</div>
Career Assessment Available	<input type="radio"/> Yes <input checked="" type="radio"/> No
Career Counseling Available	<input type="radio"/> Yes <input checked="" type="radio"/> No
Job Placement Assistance Available	<input type="radio"/> Yes <input checked="" type="radio"/> No
Tutorial Services Available	<input type="radio"/> Yes <input checked="" type="radio"/> No
ESL Courses Available	<input type="radio"/> Yes <input checked="" type="radio"/> No

Monica:

[Animation] Next, enter a Main Telephone Number.

[Animation] Followed by selecting the **Yes** radio button for this provider to be displayed online for the public to view.

[Animation] Then, staff must select **Yes** for the Accreditation/Approval question. As we know this is requirement for a provider to be eligible to be listed on the CA ETPL.

Step 6 – Additional Provider Details Section (cont.)

* Display Online to the public?	<input checked="" type="radio"/> Yes <input type="radio"/> No
* Accreditation / Approval	<input checked="" type="radio"/> Yes <input type="radio"/> No
Accrediting / Approving Body:	<div>Bureau for Private Postsecondary Education (BPPE) Approval to Operate ▼</div> <div>None Selected</div> <div>Bureau for Private Postsecondary Education (BPPE) Approval to Operate</div> <div>Verification of Exemption by BPPE</div> <div>WASC - Accrediting Commission for Schools</div> <div>WASC - Senior College and University Commission</div> <div>WASC - Accrediting Commission for Community and Junior Colleges</div> <div>California Department of Education (CDE)</div> <div>Nonpublic, Nonsectarian School/Agency certified by CDE</div> <div>Private School w/ current Private School Affidavit filed with CDE</div> <div>Division of Apprenticeship Standards (DAS)</div> <div>Department of Labor (DOL)</div> <div>Letter of commitment from a DOL registered or DAS approved Apprenticeship</div> <div>Northwest Commission on Colleges and Universities (NWCCU)</div> <div>Both Department of Labor and Division of Apprenticeship Standards</div> <div>Eligible Provider under Title II of WIOA</div>
Approving Agency Expiration Date:	
Career Assessment Available	
Career Counseling Available	
Job Placement Assistance Available	
Tutorial Services Available	
ESL Courses Available	
GED Assistance Available	
Other Additional Services Available	
On-site Child Care Available	<input type="radio"/> Yes <input checked="" type="radio"/> No

Monica:

After selecting the **Yes** radio button, the system will add an additional question. Who is the Accrediting/Approving Body. Staff will need to select an option from the appropriate drop down menu.

Step 6 – Additional Provider Details Section (cont.)

* **Financial Aid Available**

☐ Yes ☒ No

* **Online Registration Available**

☐ Yes ☒ No

**Eligible Provider of Youth Workforce Investment
Activities:**

☐ Yes ☐ No

* **Pell Grant Eligible:**

☒ Yes, Pell Grant Eligible.
☐ No, not Pell Grant Eligible.
☐ Pell Grant Not Applicable

Monica:

[Animation] Finally, staff will need to finish answering the remaining required fields with either a Yes or No.

Step 7 – Provider Review Status

Provider Review Status

This provider has not been reviewed

Provider Approval is Required Prior to Program Approval

Reviewing LWIA:

Sacramento Employment and Training Agency

*** Review Date:**

12/7/2022



[Today](#) (mm/dd/yyyy)

*** Review Status:**

Approved

State Review Date:

State Review Status:



Save

Cancel

Monica:

Next, note that this provider will need to be reviewed and approved before programs can be added to the provider institution profile.

Set the review date to the current date and select the appropriate Review Status. Per the ETPL Directive, [WSD21-03](#), Attachment 1, Local Areas can “nominate” a provider for the ETPL by selecting “Approved” in the Review Status.

The State ETPL Coordinator will review nominated provider profiles within 30 days of nomination, and either approve or deny the profile.

[Animation] Once you are done entering the information, staff should select the Save button.

General Tab – Additional Provider Details Section

Additional Provider Details

• Institution Code:	CA3090
• Institution Area:	Sacramento County
• Years in Business:	
• ADA Compliant:	Yes
• Institution Description:	school
• Pell Grant:	Yes
• Agency Code:	
• Main Telephone Number:	916-555-5555
• Provider Approval Status:	Approved 12/07/2022
• Provider Approval State Status:	

State ETPL Coordinator will review nominated provider within 30 days of nomination.

Monica:

Once again, the State ETPL Coordinator will review nominated provider profiles within 30 days of nomination, and either approve or deny the profile.

State ETPL Coordinator Provider Review Status

Provider Review Status

Provider Approval is Required Prior to Program Approval

Reviewing LWIA: Sacramento Employment and Training Agency

Review Date: 12/7/2022

Review Status:

* **State Review Date:** 12/7/2022  [Today](#) (mm/dd/yyyy)

* **State Review Status:** Approved ▼

Save

Cancel

Monica:

Here is a screenshot from the perspective of the State ETPL Coordinator when they approve a training provider.

State ETPL Coordinator Provider Review Status

Additional Provider Details

• Institution Code:	CA3090
• Institution Area:	Sacramento County
• Years in Business:	
• ADA Compliant:	Yes
• Institution Description:	school
• Pell Grant:	Yes
• Agency Code:	
• Main Telephone Number:	916-555-5555
• Provider Approval Status:	Approved 12/07/2022
➡ Provider Approval State Status:	Approved 12/07/2022

State ETPL Coordinator reviewed and approved provider within 30 days of nomination.

Monica:

After the State ETPL Coordinator has entered a State Review Date and Review Status Date, **[Animation]** the updated information will appear in the Provider Approval State Status field, located under the Additional Provider Details section.



Linking a Provider User to Account

Monica:

Now that we've learned the step-by-step process in created a provider registration profile. Let's now talk about what staff need to do when linking a provider user to an existing Provider Profile Account.

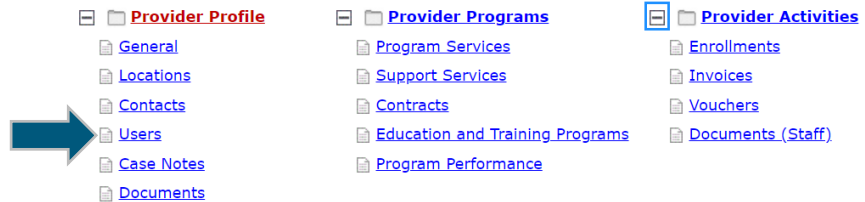
Enabling Access – Step 1



Currently Managing [CARROLL INSTITUTION](#)

Please select from the Provider Portfolio options listed below.

[[Staff Services](#)]




Monica:

Staff will need to search for the provider they would like to link a Provider user account. In this example, we are going to enable a Provider User to a Provider Profile by the name of Carroll Institution. **[Animation]** Under the Provider Profile folder, we will click on the Users link.

Enabling Access – Step 2

[General](#)[Locations](#)[Contacts](#)[Users](#)[Case Notes](#)[Documents](#)

 For help click the information icon.

Provider: Carroll Institution

Associated Provider Users

Last Name	First Name	User Name	Created Institution	Access Status	Action
Lopez	Monica	MONICA201406		Pending Access	Edit Assist Access

Page 1 of 1

Rows: 5

Search for Provider User

Create a Provider User

Monica:

After clicking on the Users link, you will be navigated to a screen with a list of associated provider users.

Please note, if a user does not appear, it is likely that they did not link themselves properly to the provider. Staff will then need to search for the provider user and link them to the appropriate training provider.

Enabling Access – Step 2

Search Mode

Search For:

☐ Providers ☒ Provider Users



Search by selecting
“Provider Users” radio
button.

Provider User Criteria

User Access Status:

None Selected ▼

User Name:

Institution:

First Name:

Last Name:

Provider FEID:




Search

Monica:

[Animation] Staff can search for a provider user by navigating to the Assist a Provider Link and selecting the Provider User Radio button at the top of the page. You can search by their username or institution name. When you are done staff should select the **[Animation]** Search button.

Enabling Access – Step 2

[General](#)[Locations](#)[Contacts](#)[Users](#)[Case Notes](#)[Documents](#)

 For help click the information icon.

Provider: Carroll Institution

Associated Provider Users

Last Name	First Name	User Name	Created Institution	Access Status	Action
Lopez	Monica	MONICA201406		Pending Access	Edit Assist Access

Page 1 of 1

Rows: 5

Search for Provider User

Create a Provider User

Monica:

Regardless if the associated provider user appears in the Users Tab table or if staff search for a provider user using the search function, both methods will display a table with a list of provider user accounts. **[Animation]** Staff will then need to select the “Access” link Under the Action column to enable access.

Enabling Access – Step 3

Menu

Information

Home

Accessibility

My Dashboard


Sign Out

Services for Individuals


Services for Employers

Quick Job Search

Currently managing: Lopez, Monica



Provider User Access.
Use this page to grant full system access to new provider users or to change the status or existing provider users.

 For help click the information icon.

User Information

User Name:	MONICA201406
Name:	Monica Lopez , Administrator
Address:	750 Capitol Ave, Sacramento, CA 95814
Phone Number:	(916) 555-5555
Registration Date:	12/07/2022 02:44 PM

Monica:

Once you click on the Access Link, staff will be directed to the Provider User Access screen and **[Animation]** the system will change from Currently managing the provider to now managing the Provider User.

Enabling Access – Step 3 (cont.)

Linked Provider Information

Link Status:	Linked
Provider Name:	Carroll Institution
Address:	750 Capitol Ave, Sacramento, CA 95814
Status:	Active

Only select “Edit Provider” button if the provider name is wrong or does not appear. .

Edit Provider

Monica:

In the Linked Provider Information section, the training provider should already appear in this section and be linked. **[Animation]** If it does not, click the Edit/Search button to find and link the Institution.

Enabling Access – Step 3 (cont.)

Access Status


User Access Status: Active ▼

Comments:

Some HTML tags, such as embedded videos are not allowed in this text box and will not be saved.

Format | Font | Size | A | [Icons]

Created by Monica Cuellar-Lopez on Wednesday, December 7, 2022


 Save Cancel

Monica:

Under the Access Status section, staff must set the User Access Status Rights to Active. **[Animation]** Then select the Save button.

Enabling Access – Step 3 (cont.)

[General](#) [Locations](#) [Contacts](#) **Users** [Documents](#)

 For help click the information icon.

Provider: Carroll Institution

Associated Provider Users

Last Name	First Name	User Name	Created Institution	Access Status	Action
Lopez	Monica	MONICA201406		Active	Edit Assist Access

Page 1 of 1

Rows: 5

Search for Provider User

Create a Provider User

Monica:

The Provider User should now have access to the provider profile.

A hand holding a blue pen points at a document featuring various charts and graphs. A dark blue banner is overlaid across the middle of the image, containing the title text.

Uploading Documentation into CalJOBS

Monica:

Next, let's discuss how to upload a document to the Documents folder in CalJOBS.

CalJOBS Document Management Module

The Documents link within a provider's profile houses all documents uploaded to that profile, including:

- ETP Assurance Form
- WASC Accreditation Document
- BPPE Approval to Operate Form
- And any training provider forms

Monica:

ETPL staff are required to maintain source documentation regarding providers eligibility status. The Document Management module provides an integrated set of tools for loading and managing documents.

Staff can access all documents imported (added), acquired (scanned), and attached (linked) to the provider's entire record within the Documents section of CalJOBS; these documents include:

- **[Animation]** ETP Assurance Form

- **[Animation]** WASC Accreditation Document
- **[Animation]** BPPE Approval to Operate Form
- **[Animation]** And any other training provider forms

The ability to upload documents and associate them with a provider's profile provides a means to store necessary documents in a central location that is available to all programs and locations, thus reducing duplication of efforts by ETPL staff.

Let's discuss where staff can find the document management module in CalJOBS.

Uploading Documents to CalJOBS – Step 1



Currently Managing [CARROLL INSTITUTION](#)
Please select from the Provider Portfolio options listed below.

[[Staff Services](#)]

Provider Profile	Provider Programs	Provider Activities
General	Program Services	Enrollments
Locations	Support Services	Invoices
Contacts	Contracts	Vouchers
Users	Education and Training Programs	Documents (Staff)
Case Notes	Program Performance	
Documents		

Monica:

After searching for a provider and navigating to their profile, within the Provider Profile folder, **[Animation]** select the link to the [Documents](#) tab.

As you can see, staff who are currently managing a provider, will also have access to a secondary Documents (Staff) folder located in the **Provider Activities** Folder.

[Animation] Both folders will allow staff to view, upload, and or scan a document in the system.


Uploading Documents to CalJOBS – Step 2

[General](#) [Locations](#) [Contacts](#) [Users](#) [Case Notes](#) **Documents**

Show Filter Options (Showing all records)

No records found

Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with _ when saving the document in our system.

 [Upload a Document](#) [Scan a Document](#) [Complete Online Form](#)

[Return to My Dashboard](#)

Monica:

After clicking the [Documents](#) link, you will land on the [Documents Available](#) page.

To add an electronic document to a providers record (already saved to a PC, not using a scanner), **[Animation]** select the **Upload Document** button.

Uploading Documents to CalJOBS – Step 3

Document Information

Document Description:	Accreditation Certification, as applicable
* Document Tags: Keywords that will be indexed with this attachment.	None Selected Accreditation Certification, as applicable Application(s) Attendance Records City Business License County Business License Denial Letter Industry Specific License, as applicable Local Business License Other Accreditation Other Tax Document Post-Secondary Letter which lists all approved classes Post-Secondary License Progress Reports Release of Information Requested Information School Records State Business License State Commission on Post-Secondary Education License Other
User Accessible:	
Date Received:	
Document Expires:	
Medical Document:	

Monica:

Next, the system will navigate to the Document Information page.

The first part of this section is the Document Description. **[Animation]** In the dropdown menu, there are various documents description types to choose from, ranging from Accreditation to State Business License. Choose the appropriate description. **[Animation]** For this example, we have chosen Accreditation, Certification, as applicable.

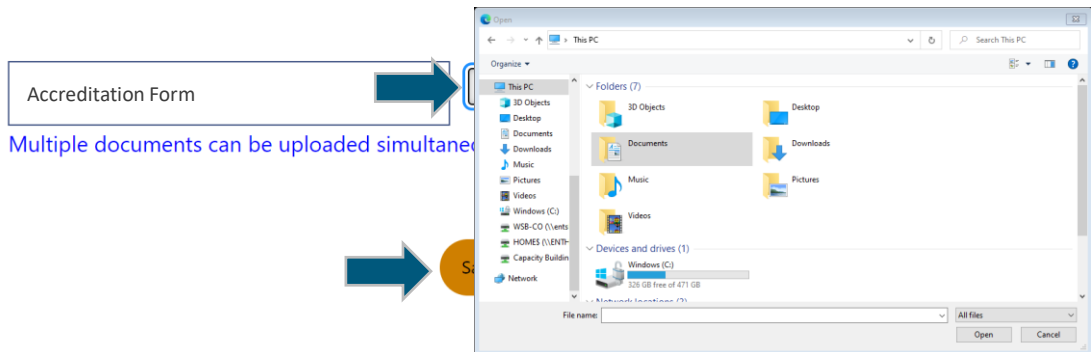
Next, you must add Document Tags that work as keywords when you conduct a document search report. **[Animation]** It is a **required** field, so you will need to add at least one document tag. Using organizational naming conventions in your document tags will aid in monitoring later on.

For User Accessible choose either yes or no. This will allow the individual to view the document. If you want to fill out the Date Received you may, however leaving it blank

will autofill to today's date. And finally, if you check the Document Expires box, you may choose to have the document expire at a certain date.

Uploading Documents to CalJOBS – Step 3 (cont.)

Attach Document

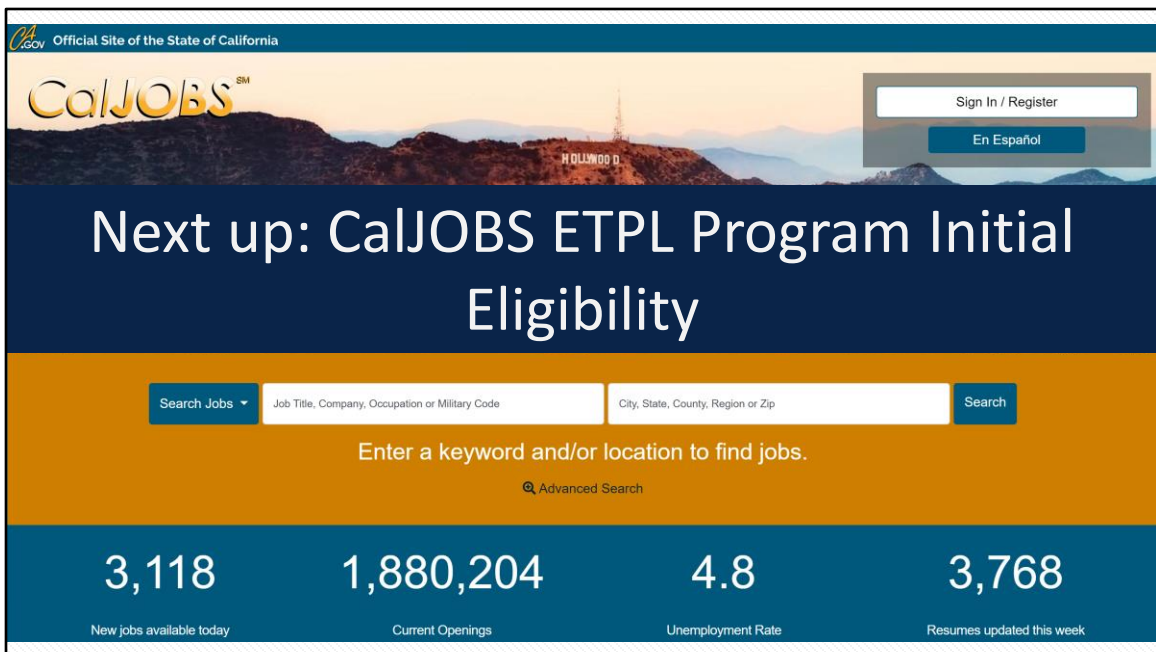


Monica:

Next, under the **Attach Document** section, **[Animation]** select the **Select File** button **[Animation]** and a pop-up window will appear allowing staff to **Choose a File to Upload** from their PC. Select the file for the attachment and select the **Open** button. **[Animation]**

Once the document is opened and populates in the **Location** box, **[Animation]** select the **Save** button.

Please note, the name of the uploaded document defaults to the document's File Name and cannot be edited after initial save. Therefore, it is recommended that staff save the document to their drive or server with the naming convention, prior to uploading to CalJOBS. There is also a link in the upper right corner of the Attach Document that provides a list of all **Supported File Formats**.



Max:

Thank you for watching the second part of our presentation on the CalJOBS Provider Module.

Next up we will explore the details of the ETPL Program Initial Eligibility process in CalJOBS.

Thank You

