

CHAPTER 15

CalJOBS

Overview

Introduction

The Workforce Innovation and Opportunity Act (WIOA) provides a workforce system that delivers career and training services at the America's Job Centers of California (AJCC). The data of these services are tracked in the CalJOBS system through the use of CalJOBS activity codes. Activity codes can be applied to an individual or employer account.

The use of activity codes has a direct relationship to federal reporting and WIOA performance indicators and should be evaluated closely to ensure the service provided aligns with the definition of the activity code selected for entry into CalJOBS.

CalJOBS Activity codes are located in the **WDD Intranet>Forms and Manuals** in the CalJOBS Activity Code folder and are listed as follows:

- CalJOBS Activity Codes Dictionary
- CalJOBS Activity Codes Detailed Listing – Individual
- CalJOBS Activity Codes and Performance – Crosswalk
- CalJOBS Activity Codes Detailed Listing – Employer

References

This handbook chapter contains information regarding WIOA regulations, signed into law in 2014 and Federal Register, Title 20 Part V and Part VI and State directives received from the Department of Labor (DOL) and/or Employment Development Department (EDD).

DOL	EDD
Training and Employment Guidance Letters (TEGL):	Workforce Service Directives (WSD):
<ul style="list-style-type: none">• TEGL 10-16	<ul style="list-style-type: none">• WSD 19-03, WSD 19-06, and WSD 19-08

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Management Information System (MIS) Administrator

Introduction

The CalJOBS system is the federally recognized “system of record” for tracking and reporting California’s Workforce Innovation and Opportunity Act (WIOA) Title I, subtitle B, Title III Wagner-Peyser, Trade Adjustment Assistance (TAA), and Jobs for Veterans State Grant (JVSG) participants.

As the system of record, CalJOBS provides a unified and streamlined intake and case management system that enables co-enrollment across programs, and consistent recording of data elements for reporting to the Department of Labor (DOL).

The Management Information System (MIS) Administrator plays a critical role in assisting staff with using the CalJOBS system and ensuring the safety of the data stored within the system. CalJOBS contains Personally Identifiable Information (PII), sensitive, and confidential data, which must remain secure at all times.

MIS role and responsibility

The MIS Administrator is granted “administrative” level privileges to create and manage CalJOBS staff user accounts. The designated MIS Administrator is responsible for, but not limited to:

- Creating new CalJOBS staff user accounts,
- Resetting passwords,
- Removing user accounts,
- Submitting system issues, and
- Set-up and maintenance of the VOS Greeter module.

Note: Refer to the **Administration Handbook, Chapter 16 – Computer and MIS Policy** for additional information about the MIS Administrator.

Point of contact

The MIS Administrator is the Single Point of Contact (SPOC) for his/her local area. To ensure local areas are receiving necessary communication, the CalJOBS Operations Unit must be informed if there is a change in the designation of an MIS Administrator.

Data Entry of Training Activity Codes

Introduction

The America's Job Center of California (AJCC) staff is responsible for entering the 300 series activity codes into the CalJOBS Systems. This section will provide information on the following topics for staff:

- 300 Series - Training Activity Codes
 - Eligible Training Provider List (ETPL)
 - Actual and projected dates
 - Occupational training codes (ONET)
 - Service Provider Information
 - CalJOBS
 - Discrepancies
 - Closing Activity
 - Performance measures
 - Training Packets
-

300 Series – Training

The 300 series of activity codes are services, which include Workforce Innovation and Opportunity Act (WIOA), and Non-WIOA funded partner-training services. The most commonly used 300 activity codes used by the America's Job Center of California (AJCC) staff, but not limited to, are:

- 300 – Individual Training Account (ITA)
 - 301 – On-the-Job Training (OJT)
 - 312 – Trade Adjustment Assistance (TAA)
 - 328 – Non-WIOA Training
-

ETPL

The Eligible Training Provider List (ETPL) provides customer-focused employment training resources for adults and dislocated workers. Training providers who are eligible to receive ITAs through WIOA funds are listed on the ETPL.

Actual and projected dates

The actual and projected dates for the activity codes is extremely important and are differentiated as follows:

- Actual start date – current day or 20 days prior.
- Projected start date – any future date

Note: If projected start date passes before a begin date entry is entered into the Virtual One-Stop (VOS) system, the system will automatically close the activity on the projected date. Refer to the **Discrepancy** block in this chapter for what action needs to be completed to resolve the issue.

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Data Entry of Training Activity Codes, Continued

Occupational training codes

The occupational training codes are used to identify the service course and verify the occupation the participant selected. Occupational training codes are also known as O-Net codes and can be searched by:

- Keyword,
 - Group,
 - Listing,
 - Education Program,
 - Military Specialty,
 - Occupation code, or
 - License.
-

Service Provider

The service provider is the vendor who is providing the courses a participant selected for his/her training for the 300 activity code. The service provider for an OJT 301 activity code is the AJCC who created the training for the participant.

CalJOBS

It is important for the Workforce Development Specialist (WDS) to verify the activities entered into CalJOBS.

Note: Refer to the **Discrepancy** block in this chapter for a resolution to the issue.

Closing activity

The WDS should always close an activity in the VOS system rather than allowing the activity code to system close. Participants who find employment and requesting Supportive Services; a **Closure** must be created. By completing the closure, the WDS will be able to use the follow-up ("F") keys to issue Supportive Services.

Performance measures

There are two (2) performance measures required for training activities, they are:

- Measurable Skills Gain (MSG), and/or
- Credentials.

For MSG to be completed, the WDS must obtain the completion certificate from the school or employer:

- OJT – OJT Certificate of completion
- 300 or 328 – School transcripts showing progress

For credentials to be completed, the WDS must obtain the industry-recognized certificate from the school. It is critical to have all signatures and dates on the credentials.

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Data Entry of Training Activity Codes, Continued

Training packets

Each training packet has various documents or requirements, which must be included and scanned into the customer's case record. The table below outlines the most commonly used training codes and required documents.

Activity Code	Documents
300 – ITA	<ul style="list-style-type: none">• Entire ITA contract (WDD ITA 706)• ETPL Printout• Begin/End dates for the training• Approval e-mail for training cost of \$5,000 or more• ITA Checklist form (WDD ITACLR) <p>Note: It is important to have the ETPL printout as part of the training packet in case the State drops the provider from ETPL or price of the training changes.</p>
301 – OJT	<p>E-mail from the Business Service Representative with the following detailed information:</p> <ul style="list-style-type: none">• Name of Individual• Name of Employer• Hours and Hourly Wage• Begin/End dates of the OJT• Contact Information for employer:<ul style="list-style-type: none">– Name– Phone number– E-mail, optional
312 – TAA	<ul style="list-style-type: none">• TAA contract• Begin/end dates for the training• School information obtained from TAA Advisor
328 – Non-WIOA	<ul style="list-style-type: none">• Non-ITA Registration or Education (ED) Plan• Begin/end dates for the training• School information• Non-ITA Check List

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Data Entry of Training Activity Codes, Continued

ITA process The WDS will complete the following actions when entering an activity code 300 for a new ITA (WDD ITA 706 form).

Step	Action
1	<ul style="list-style-type: none"> • Check Training packet to ensure all appropriate documents are included, • Review the ITA contract to ensure the following information is listed prior to entering the data into the VOS system: <ul style="list-style-type: none"> – Name of ETPL provider – Course title and description (O-Net codes) – Funding category – Dates <ul style="list-style-type: none"> ✓ Actual or Projected start dates – Financial aid (ITA and WIOA program referral should match) – Signatures, and – Approval e-mails (Supervisor/Manager, Administrative Supervisor II, or Director).
2	<ul style="list-style-type: none"> • Access CalJOBS, • Select Assist an Individual, and • Select Programs.
3	<ul style="list-style-type: none"> • Go to the WIOA application, • Expand the WIOA application to view all the options, • Expand the Activities option, and • Select Create Activity through the Activities/Enrollments/Services link.
4	<ul style="list-style-type: none"> • Enter the following information on the General Information Tab: <ul style="list-style-type: none"> – Customer Program Group (automatically populates) <ul style="list-style-type: none"> ✓ Verify funding category matches what is on the ITA contract – Office Location – Agency code (must select the click here button to search/select the agency code) • Go to the Enrollment section and complete the following: <ul style="list-style-type: none"> – Grant – no selection needed for adult/dislocated workers fund – WIOA Title II Partner Program field – leave blank – Activity code – select 300 – Actual or Projected start date – enter date and set calendar control for projected date – Projected end date – date training is to end – Any classes attended through Distance Learning – defaults to No – Participant has been issued an ITA and ITA will pay for this service – Answer Yes, and • Click on the Next button.
5	<p>Enter the following information on the Enrollment Service Provider Tab:</p> <ul style="list-style-type: none"> • Provider – search for the participants school <ul style="list-style-type: none"> – If multiple providers exist, system will auto populate a vendor; advisor needs to ensure correct provider is entered. • Service Course or Contract <ul style="list-style-type: none"> – Must be specific for the actual cost on the contract to match. – Exact Title Course should be entered; no abbreviations. • Provider Location – search for the school location • O-Net code • Click on the Next button.

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Data Entry of Training Activity Codes, Continued

ITA process, continued

Step	Action
6	<ul style="list-style-type: none"> • Enrollment Cost Information Tab is populated; No changes are to be made; however, if the cost doesn't match amount on contract, submit a helpdesk ticket to MIS Administrator, and • Click on the Next button.
7	<ul style="list-style-type: none"> • Complete the following information on the Enrollment Financial Aid Tab: <ul style="list-style-type: none"> – Financial aid applicable question defaults to No, only change response to Yes, if applicable. – Select the click here button by the Add Financial aid data filed; pop-up window appears <ul style="list-style-type: none"> ✓ Locate the financial organization; if not listed, select other and enter name of the financial organization. • Click the Amount App towards Service Cost radio button: <ul style="list-style-type: none"> – Status = awarded – Amount = dollar amount; should be same amount for the Budget towards Service Cost data field • Click the Calculate button; new planning cost should match, • Click the Next button to review the summary, • Click the Next button; review budget information populates, • Click the Next button; review closure information populates.
8	<ul style="list-style-type: none"> • Select Add Case Note, • Select ITA Activity Created for the specific AJCC location from the Case Note Template data field and complete the following information: <ul style="list-style-type: none"> – Case note date – enter today's date, – LWIA Region – enter San Bernardino County, Jobs and Employment – Office Location – AJCC location – Program – WIOA Title I – Subject – ITA Activity Created, and – Case note description – enter the following information: <ul style="list-style-type: none"> ✓ ITA create date, ✓ Activity code, ✓ Begin and end dates, ✓ Name of Provider, ✓ Location of Provider, ✓ ITA total amount, ✓ Financial aid amount, ✓ WDD cost, and ✓ Staff Name/Title. • Click Save button.
9	<ul style="list-style-type: none"> • Go to CalJOBS and confirm activity is listed, • Scan documents into CalJOBS (including the WDD ITA Checklist), and • Verify images are legible. <p>Note: Any activity or other issue identified as not listed in CalJOBS, submit a helpdesk ticket to MIS Administrator. Refer to Administration Handbook, Chapter 16 – Computer and MIS Policy for Helpdesk ticket process.</p>

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Data Entry of Training Activity Codes, Continued

OJT process The WDS will complete the following actions when entering an activity code 301 for an OJT.

Step	Action
1	<ul style="list-style-type: none"> Ensure email from Business Service Representative (BSR) includes the following information: <ul style="list-style-type: none"> Who – name of the participant Where – Employer name When – dates the participant OJT will begin/end. Hourly wages for the participant O-Net codes Contact information for the Employer Confirm OJT is signed off by the Business Service Manager.
2	Check the Activity codes for 205 IEP/ISS to justify the OJT.
3	<ul style="list-style-type: none"> Access CalJOBS Select Assist an Individual, and Select Programs.
	<ul style="list-style-type: none"> Go to the WIOA application, Expand the WIOA application to view all the options, Expand the Activities option, and Select Create Activity through the Activities/Enrollments/ Services link.
4	<ul style="list-style-type: none"> Enter the following information on the General Information Tab: <ul style="list-style-type: none"> Customer Program Group (information is auto-populated based on eligibility) <ul style="list-style-type: none"> ✓ Verify funding category matches what is on the ITA contract Office Location Agency code (must select the click here button to search/select the agency code) Go to the Enrollment section and complete the following: <ul style="list-style-type: none"> Activity code – select 301 Actual or Projected start date – enter date and set calendar control for projected date Projected end date – date training is to end Any classes attended through Distance Learning – defaults to No Participant has been issued an ITA and ITA will pay for this service – Answer No, and Click on the Next button.
5	<ul style="list-style-type: none"> Go to Enrollment Service Provider Information Tab and complete the following data fields: <ul style="list-style-type: none"> Provider – AJCC location Course - OJT <ul style="list-style-type: none"> ✓ O-Net code ✓ Tabs for codes are populated, ✓ Choose any tab to lookup Occupations by keyword for the appropriate selection, and ✓ Select the appropriate Occupation Training Code. Click on the Next button; Red Warning appears, this is normal, system will populate the Worksite Information Tab.

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Data Entry of Training Activity Codes, Continued

OJT process, continued

Step	Action
6	<ul style="list-style-type: none"> Complete the following data fields on the Worksite Information Tab: <ul style="list-style-type: none"> Employer Name – must enter the full name of the employer, no abbreviations. ✓ Example: Summit Leadership is actually named Summit Leadership Academy. Employer address – Includes city, state, and zip code, Contact name and phone number Contact e-mail, if available Hourly wage Weekly hours Is this a green job? O-Net code will have a leaf if searching by code # or the OJT paperwork may state if employer is a green job. Click on the Next button.
7	<ul style="list-style-type: none"> Review the Total OJT Wage Costs information as this is pre-populated and the defaulted information is not correct, Go to the Enrollment Cost Information Tab and complete the following data field: <ul style="list-style-type: none"> Wage Wage type Duration <p>Notes:</p> <ol style="list-style-type: none"> The system automatically pre-populates the Total Cost once wage, wage type, and duration is entered. If calculation does not match the amount on the contract and amount is greater than \$50, submit a helpdesk ticket for MIS. Wage reimbursement rate equals 50% and NO financial aid is associated to an OJT. <ul style="list-style-type: none"> Click on the Next button and repeat this action for a total of three (3) times to bypass the Financial and Budget tabs.
8	<p>Create a case note for the activity using the OJT Activity Created template and complete the following data fields:</p> <ul style="list-style-type: none"> Case note date – enter today's date, LWIA Region – enter San Bernardino County, Jobs and Employment Office Location – AJCC location Program – WIOA Title I Subject – ITA Activity Created, and Case note description – enter the following information <ul style="list-style-type: none"> OJT create date Activity code, Enter begin/end dates, Name of Employer, E-mail scanned into CalJOBS, and Staff Name/Title. Click Save button.
9	<ul style="list-style-type: none"> Confirm Activity code is listed under the Programs tab in CalJOBS, and Scan email into CalJOBS.

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Data Entry of Training Activity Codes, Continued

Non-ITA and TAA process

Complete the most of the same process for a Non-ITA and a TAA training. The training advisor will complete the following actions when entering an activity code 312 (TAA contract) or 328 (Non-ITA funded contract).

Step	Action
1	<p>Review the Non-ITA or TAA contract to ensure the following information is included prior to entering the data into the VOS system:</p> <ul style="list-style-type: none"> • Name of provider • Course title and description (O-Net codes) • Dates <ul style="list-style-type: none"> – Actual or Projected start dates • Financial aid (Non-ITA and WIA program referral should match) • Signatures, and • Approval e-mails (Supervisor/Manager, Deputy Director, or Director).
2	<ul style="list-style-type: none"> • Access CalJOBS system, • Select Assist an Individual, and • Select Programs.
3	<ul style="list-style-type: none"> • Go to the WIOA application, • Expand the WIOA application to view all the options, • Expand the Activities option, and • Select Create Activity through the Activities/Enrollments/ Services link.
4	<ul style="list-style-type: none"> • Enter the following information on the General Information Tab: <ul style="list-style-type: none"> – Customer Program Group (automatically populates) <ul style="list-style-type: none"> ✓ Verify funding category matches what is on the contract – Office Location – Agency code (must select the click here button to search/select the agency code) • Go to the Enrollment section and complete the following: <ul style="list-style-type: none"> – Grant – no selection needed – WIOA Title II Partner Program field – Yes, Select Partner data field will appear – Select Partner – choose TAA or Other Non-WIOA program for Non-ITA contract – Activity code – select 312 (TAA) or 328 (Non-ITA) – Actual or Projected start date – enter date and set calendar control for projected date – Projected end date – date training is to end – Any classes attended through Distance Learning – defaults to No – Participant has been issued an ITA and ITA will pay for this service – leave blank, and • Click on the Next button.
5	<p>Enter the following information on the Enrollment Service Provider Tab:</p> <ul style="list-style-type: none"> • Provider Name and Location – enter the AJCC • O-Net code • Click on the Next button.
6	<p>Continue clicking the Next button until the Closure Information Tab.</p>

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Data Entry of Training Activity Codes, Continued

Non-ITA and TAA process, continued

Step	Action
7	<ul style="list-style-type: none"> Select Add Case Note, Select Non-ITA or TAA Activity Created for the specific AJCC location from the Case Note Template, Complete the following data fields: <ul style="list-style-type: none"> Case note date – enter today's date, LWIA Region – enter San Bernardino County, Jobs and Employment Office Location – AJCC location Program – WIOA Title I Partnered Program – select TAA or Other Non-WIOA program Subject – Non-ITA or TAA Activity Created Case note description – enter the following information <ul style="list-style-type: none"> ✓ Non-ITA or TAA create date ✓ Activity code ✓ Begin and end dates ✓ Name of School participant will be attending Click Save button.
8	<ul style="list-style-type: none"> Verify activity code is listed in CalJOBS, Scan documents into CalJOBS (including the Non-ITA Checklist), and Verify images are legible. <p>Note: Submit a helpdesk ticket to MIS Administrator if activity or any issue identified is not showing in CalJOBS.</p>

Training completion verification

The WDS will obtain verification from the provider when the participant completes his/her training. What type of verification will depend on what 300 series code the participant completed. The table below outlines the verification needed.

Activity code	Performance Standards	Verification
<ul style="list-style-type: none"> 300 312 328 	<ul style="list-style-type: none"> Measurable Skills Gain, and/or Credential 	<ul style="list-style-type: none"> Confirmation letter from Provider stating customer completed course successfully, or Transcripts. <p>Note: Activity code can be closed successfully without the certification. Last date entered in the VOS system will be the date training ended, not the date the certificate is received.</p>
301	Measurable Skills Gain	Required prior to closing the activity: <ul style="list-style-type: none"> Last OJT invoice, and Certificate of completion.

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Data Entry of Training Activity Codes, Continued

Closing training activity code

Closing of a training activity is the completion of an activity code, but the participant's case is still active for 90 days unless another activity code is entered. The activity code must be a staff assisted code to restart the 90-day clock.

The table below outlines the process for closing an activity.

Step	Action
1	<ul style="list-style-type: none"> Go to the WIOA application, Expand the WIOA application to view all the options, and Expand the Activities option
2	<ul style="list-style-type: none"> Go to the Actual End Date column, Locate the appropriate training activity code to close, and Click on the word Close.
3	<p>Enter the following information on the Closure Information Tab:</p> <ul style="list-style-type: none"> Last activity date – enter date training ended not date certificate was received. Refer to OJT procedures for any discrepancy. Completion code – select appropriate response from drop-down box: <ul style="list-style-type: none"> Successful completion Unknown status Dropped out of activity Unsuccessful completion Void
4	<ul style="list-style-type: none"> Select Add Case Note, Select Closing Training Activity for the specific AJCC location from the Case Note Template, Complete the following data fields: <ul style="list-style-type: none"> Case note date – enter today's date, LWIA Region – enter San Bernardino County, Jobs and Employment Office Location – AJCC location Program – WIOA Title I Partnered Program – select TAA or Other Non-WIOA program Subject – Closing Training Activity Case note description – enter the following information <ul style="list-style-type: none"> ✓ Close date ✓ Provider ✓ Certificate received or pending ✓ Staff Name/Title Click Save button.

Performance process

Entering the Measurable Skills Gain and Credential when the customer successfully completes his/her training is important to ensure Workforce Development Department (WDD) is collecting and reporting the data used to determine the performance outcome for this measure. The Measurable Skills Gain is "real-time" performance measure the state uses and allows WDD to collect data.

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Data Entry of Training Activity Codes, Continued

Discrepancy

A discrepancy is a lack of compatibility or similarity between two (2) or more facts. Advisors can avoid and/or fix some discrepancies and other discrepancies require assistance from Management Information Services (MIS) Administrator. The following lists the discrepancy (error) staff or MIS Administrator can resolve.

Staff

Will only have the security rights to resolve discrepancy where the Providers name is not displayed on any of the 300 series activity code. To correct the discrepancy, staff will:

- Access the activity code,
- Click on the purple letter (also known as the skittle),
- Enter the Provider information, and
- Click Next.

MIS Administrator

All discrepancies, other than Providers name missing, requires staff to submit a helpdesk ticket to MIS Administrator to resolve. Most common discrepancies identified, but not limited to, are:

- A 300 series activity code displays the wrong provider name.
 - Projected start date was entered, but the begin date was not entered and date has passed.
 - Follow-up keys (F-Keys) did not populate to allow staff to issue Supportive Services after closure activity was completed.
 - Incorrect dollar amount is displayed on the Financial Tab (does not match contract amount).
 - Extending training dates.
 - Service Course missing.
 - Training Activity Code is not showing in CalJOBS.
-

Remote WIOA Enrollment

Introduction

Customers will be able to access and complete a Workforce Innovation and Opportunity Act (WIOA) pre-application in CalJOBS. The functionality allows the customer to begin the request for WIOA services virtually. This will improve the efficiency of an in-person, as well as virtual services.

This section outlines the process for the completion of the pre-application for the America's Job Center of California (AJCC) staff.

WIOA Pre-Application

The customer will click on the "Create WIOA Pre-application link within the My Benefits Plan widget on their dashboard once the customer has completed the self-registration in CalJOBS.

The pre-application is the first step to request WIOA services. The customer will answer certain WIOA questions and upload documentation in CalJOBS without having to visit the AJCC in person.

Note: The pre-application is not a complete WIOA application. Refer to the **WDD Intranet>Resources** folder for the [CalJOBS WIOA Pre-Application user guide](#).

Summary report

The AJCC manager/supervisor or Workforce Development Technician (WDT) will pull a daily summary report of individuals who have completed the WIOA self-application in CalJOBS.

The AJCC manager or supervisor will assign the customer's WIOA pre-application to an AJCC advisor for WIOA enrolment.

AJCC process

Upon receiving the pre-application from the manager or supervisor, the WDT will be required to:

- Contact customer to schedule an appointment to complete the initial enrollment within three (3) business days.
- Complete the WIOA enrollment virtually through a video or telephone visit. If using video, send Zoom link to customer.
- Ask the WIOA questions not included in the pre-application during the scheduled appointment.
- Once the interview is completed, send customer link to sign and review the WIOA application in PDF format.
- Obtain customer signature on forms utilizing CalJOBS electronic signature function.
- Update VOS Greeter with the appropriate code.

All required forms can be sent electronically to our customers. The customer can upload documents without a visit to the AJCC. Once the customer signs the application, a confirmation is sent to the advisor.

Note: For additional instructions on how to utilize the Remote Electronic Signature refer to the [CalJOBS Remote Electronic Signature User Guide](#) located on the **WDD Intranet>Resources** folder

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Remote WIOA Enrollment, Continued

Case note

The WDT will complete a detailed case note after completing the WIOA pre-application initial enrollment and after the scheduled appointment. Case note should include, but not limited to:

- Obtained responses from customer on the WIOA questions not included in the pre-application,
- Date and time of scheduled appointment,
- Eligibility determination,
- Services provided to customer,
- Activities entered in CalJOBS, if applicable, and
- Documentation customer needs to provide, if applicable.

Customers who decide, after completing the WIOA pre-application, they are not interested in WIOA services; the WDT must complete a case note including the reason why customer is cancelling request. WDT will enter "WIOA pre-app declined" as the subject line for the case note.

Deletion of application

Any Pre-application in pending status after 60 days must be deleted from the CalJOBS system.

Measurable Skills Gain

Introduction

The America's Job Center of California (AJCC) staff will be entering the Measurable Skills Gain (MSG) in CalJOBS and will no longer forward or submit copies to the Management Information Services (MIS) Administrator to input into CalJOBS. In addition to entering the MSG and Credentials into CalJOBS, AJCC staff will scan the documents into the participant's case file following the Scanning Guide policy.

MSG vs. Credential

Knowing the difference between MSG and Credential is important to ensure the correct progress data is entered into CalJOBS for the participants.

Workforce Innovation and Opportunity Act (WIOA) defines MSG as documented academic, technical, occupational, or other forms of progress towards a credential or employment.

Credential attainment is defined as earning a recognized postsecondary credential or a secondary school diploma, or its recognized equivalent, during participation or within one year after exit from the program.

Example: Participant is enrolled in Trucking School and successfully completes the training course. Participant receives a certificate of completion; this will be added as a MSG in CalJOBS. Six months after exit, participant passes and receives a Truck Driver license; this will be added as a Credential in CalJOBS.

Types of MSG

There are five (5) types of MSG that are captured in CalJOBS:

1. Educational Functioning Level (EFL)
2. Secondary School Diploma or equivalent
 - Documented attainment of a secondary school diploma or its recognized equivalent
3. Transcript/Report Card
4. Progress towards established Milestone
5. Skills Progression (passage of an exam)

Note: MSG is not an exit-based measure it is captured in real-time during participation. If the period of participation spans over multiple program years (PY) a new MSG must be calculated for each PY the participant is enrolled in an education or training program.

EFL

Documented achievement of at least one EFL of a participant who is receiving instruction below the postsecondary education level. Participant:

- Enrolls in program in an education or training program leading to a recognized postsecondary credential or employment, and
- Is an English Language Learner or Basic Skill Deficient/Low levels of literacy.
- Completes a pre-test and post-test showing an increase in EFL score

Note: Information is captured in the CalJOBS system under the *MSG* tab.

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Measurable Skills Gain, Continued

Transcript or Report Card

Documentation of a transcript or report card for secondary or postsecondary education for one semester showing the participant is meeting the State unit's academic standards as outlined by the California Department of Education (CDE).

- Secondary Education – Transcript or report card for one semester; participant enters program and enrolls in secondary education
- Postsecondary Education – Full time must complete a minimum of 12 credit hours for one semester.
- Postsecondary Education – Part time must complete a minimum of 12 credit hours over two (2) consecutive semesters.

Postsecondary for full or part time, participant must enter and enroll into the program, submits his/her transcripts, and meets the requisite number of credit hours.

Note: Information is captured in the CalJOBS system under the *MSG* tab.

Training Milestone

The training milestone is a satisfactory or better progress report towards established milestones from an employer or training provider. Participant:

- Enters program and enrolls in OJT or registered apprenticeship (does not include enrollment in occupational skills training).
- Demonstrates substantive skill development; employer reports a training milestone has been attained

Note: Information is captured in the CalJOBS system under the *MSG* tab; select "Training Milestone" as the skill type.

Skills Progression

Skills progression is a passage of exam that is required for a particular occupation, or progress in attaining technical or occupational skills as demonstrated through a trade-related benchmark. Passage of an(a):

- Exam in an occupational program
- Employer-required knowledge based exam
- Occupational competency-based assessment
- Completion test necessary to obtain a credential

The participant:

- Enters program
- Enrolls in an occupational skills training program
- Passes examination that demonstrates attainment of occupational skills

Note: Information is captured in the CalJOBS system under the *MSG* tab

Continued on next page

Measurable Skills Gain, Continued

CalJOBS Report

MIS Administrator will run a monthly report to identify participants who completed training. AJCC staff will review the report and will take action on the participants who have an “N” identified in the Numerator column of the report.


	C	D	E	H	I	J	K	L	M	N	O	P	Q	R	S	AC
1	WIOA Predictive - Measurable Skill Gains Indicators															
2	- Program Title I - Workforce Development (WIOA)															
3	- Region/LIVOS: San Bernardino County, Jobs and Employment Service															
4	- Office: SBO East Valley AJCC															
5	- Date Range: 7/1/2020 - 6/30/2021 Report Run Time: 8/25/2021 1:36:55 PM															
6	State ID	Lead App ID	Name	Responsible Office	Primary CM	Entry Date	Exit Date	Exit Reason	Date Entered Education /Training	Date Completed Education /Training	Enrolled in Education/ Training	Secondary Education	Post-Secondary Education	OJT/ RA	Numerator	Denominator
7	727782549	20661927	Ealy, Mariessa Y	SBO East Valley AJCC	Chacon, Marcos	05/04/2021			05/10/2021		Y	N	N	Y	N	Y
8	605604179	20490294	Williams, Sharhonda	SBO East Valley AJCC	Calver, Robyn	02/09/2021			03/20/2021		Y	N	Y	N	N	Y

AJCC staff will search the State ID for the participant; once the participant is located:

- Check to see if the training has been completed.
- Locate the credential or training certificate indicating completion of the training or documentation of progress.
- Complete the MSG link; refer to the CalJOBS process block for instructions. Not all participants will be successful, or have completed the training.

CalJOBS process for MSG

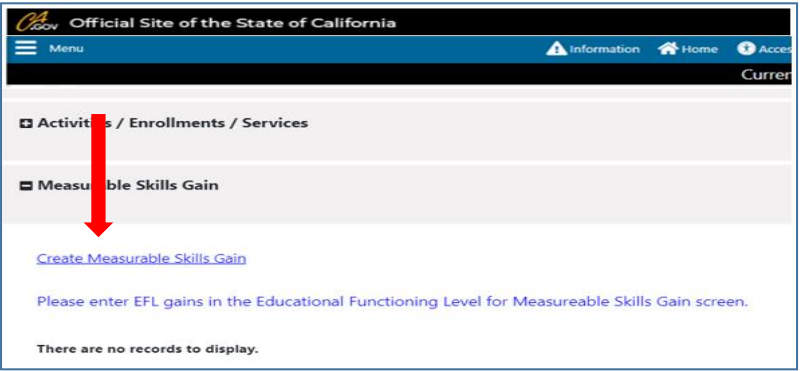
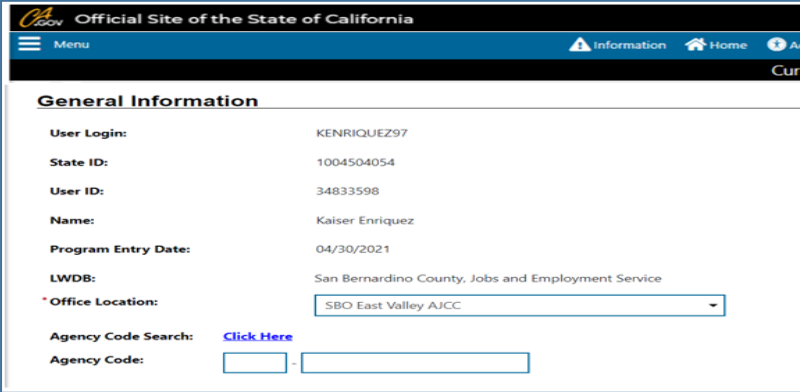
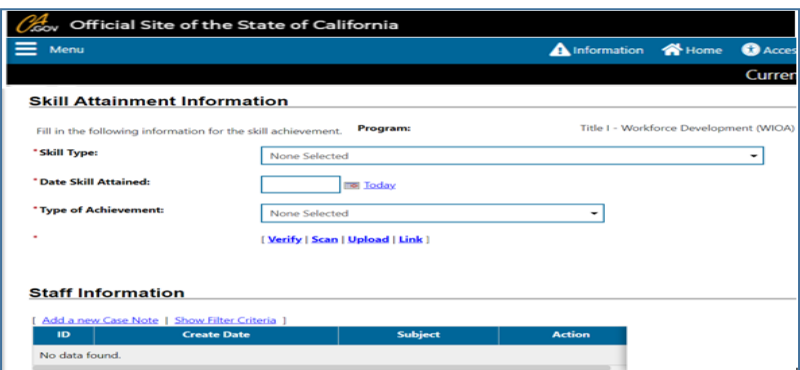
The table below outlines the process staff will complete to capture the MSG Credentials in CalJOBS.

Step	Action	Result
1	Expand the Measurable Skills tab,	

Continued on next page

Measurable Skills Gain, Continued

CalJOBS process for MSG, continued

Step	Action	Result
2	Click on the create measurable skills gain link	 <p>The screenshot shows the 'Official Site of the State of California' header with a 'Menu' button and links for 'Information', 'Home', and 'Access'. Below the header, there are two main sections: 'Activities / Enrollments / Services' and 'Measurable Skills Gain'. A red arrow points to the 'Create Measurable Skills Gain' link under the 'Measurable Skills Gain' section. Below this link, there is a message: 'Please enter EFL gains in the Educational Functioning Level for Measureable Skills Gain screen.' and a note: 'There are no records to display.'</p>
3	<ul style="list-style-type: none"> Complete all the data entries for all fields, and Continue through page. 	 <p>The screenshot shows the 'General Information' form. It includes fields for 'User Login' (KENRIQUEZ97), 'State ID' (1004504054), 'User ID' (34833598), 'Name' (Kaiser Enriquez), 'Program Entry Date' (04/30/2021), 'LWDB' (San Bernardino County, Jobs and Employment Service), and 'Office Location' (SBO East Valley AJCC). There are also fields for 'Agency Code Search' (with a 'Click Here' link) and 'Agency Code' (with two input boxes).</p>
4	<ul style="list-style-type: none"> Click save when all the data input is completed, and Complete a case note. 	 <p>The screenshot shows the 'Skill Attainment Information' form. It includes a 'Program' dropdown (Title I - Workforce Development (WIOA)) and a 'Skill Type' dropdown (None Selected). There are also fields for 'Date Skill Attained' (Today) and 'Type of Achievement' (None Selected). Below these fields, there are links for 'Verify', 'Scan', 'Upload', and 'Link'. At the bottom, there is a 'Staff Information' section with a table that has columns for 'ID', 'Create Date', 'Subject', and 'Action'. The table currently shows 'No data found.'</p>

Credential

Introduction

The America's Job Center of California (AJCC) staff will be entering the Credentials in CalJOBS and will no longer forward or submit copies to the Management Information Services (MIS) Administrator to input into CalJOBS. In addition to entering the MSG and Credentials into CalJOBS, AJCC staff will scan the documents into the participant's case file following the Scanning Guide policy.

Credential Attainment

Credential Attainment is the percentage of participants enrolled in an education or training program (excluding participants in On-the-Job Training and customized training) who attained a recognized postsecondary credential or a secondary school diploma, or its recognized equivalent, during participation in or within one year after exit from the program.

The successful completion of a training program does not mean a credential was attained. The participant must have completed the training, fulfilled all of the requirements to receive the credential (e.g. passage of credential exam), and provide credential verification.

Excluded as credential

Not counted as a credential for performance purposes are the following:

- Certificates awarded by the Workforce Development Board (WDB), and
- Work Readiness certificates related to:
 - General hygiene (handwashing)
 - General safety
 - Cardiopulmonary resuscitation (CPR),
 - Work readiness, and

Food handling certificates even if such general skills certificates are broadly required to qualify for entry-level employment or advancement in employment.

Types of Credentials

As stated above, there are two (2) types of credential attainment, a:

- Recognized postsecondary credential, or
 - Secondary school diploma or its equivalent.
-

Recognized postsecondary credential

WIOA defines a recognized postsecondary credential as a credential consisting of a(n):

- Industry-recognized certificate or certification,
- Certificate of completion of an apprenticeship,
- License recognized by the State or Federal Government, or
- Associate or Baccalaureate degree.

Recognized postsecondary credentials are awarded in recognition of an individual's attainment of measurable technical or industry/occupational skills necessary to gain employment or advance within an industry/occupation.

Continued on next page

Credential, Continued

Secondary school diploma

A secondary school diploma or recognized equivalent is a high school diploma that is recognized by the State or completing all GED requirements.

Completion of a secondary school diploma only counts as attaining a credential if, the participant obtains his/her high school diploma or GED and are employed or enrolled in a postsecondary credential within one year following exit from the program. Participant:

- Enters the program without a High School Diploma,
- Enrolls in secondary education, and
- Attains a secondary school diploma.

Note: Information is captured in the CalJOBS system under the Credentials tab.

Credential verification tool

The Labor Market Information Division (LMID) Occupation credential tool can assist an individual research an industry and identify if a credential is required for employment. If a credential is required, then that credential will often qualify for the credential attainment indicator.

AJCC staff are strongly encouraged to access EDD's [Labor Market Information Occupational Guides](#) before determining if a credential and/or occupational certificate qualifies under the Credential Attainment indicator.

The LMID credential verification tool is located at labormarketinfo.edd.ca.gov.

The table below are the steps AJCC staff will complete to identify/confirm if a credential is required for employment using the credential tool.

Step	Action
1	Identify occupation of interest.
2	Research occupation profile in LMID.
3	<ul style="list-style-type: none">• Determine if the occupation requires a license, and• Identify the title of the license and the necessary skills to obtain the license.

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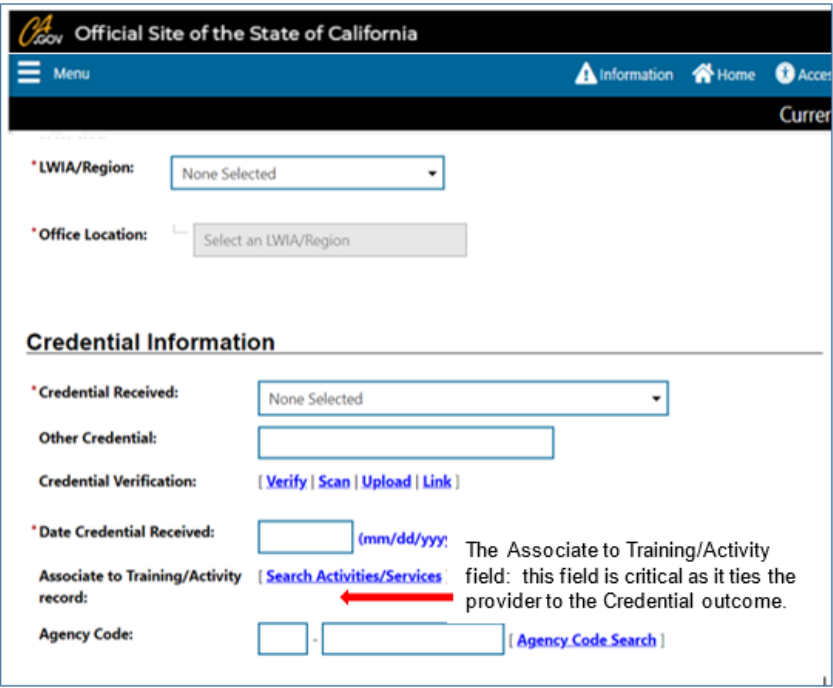
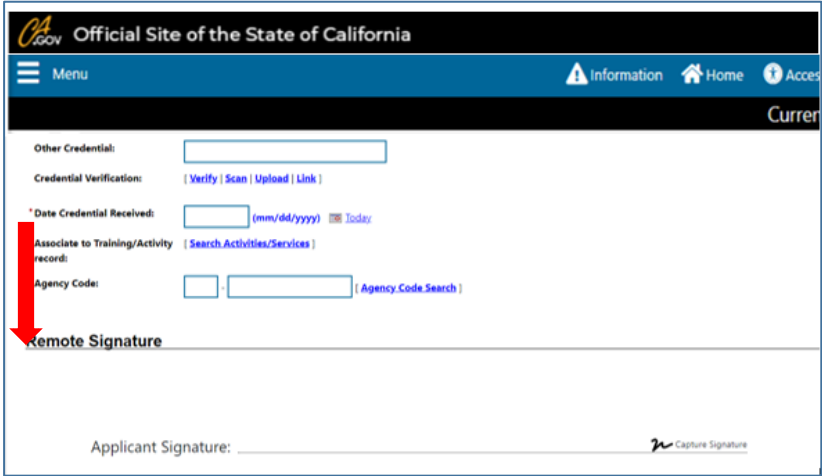
Credential, Continued

CalJOBS process for Credentials

The table below outlines the process staff will complete to capture the Credentials in CalJOBS.

Step	Action	Results
1	Expand the Credential tab,	 <p>The screenshot shows the 'Official Site of the State of California' header. Below the navigation bar, there are several menu items: 'Activities / Enrollments / Services', 'Measurable Skills Gain', 'Educational Functioning Level for Measurable Skills Gain', and 'Credentials'. A red arrow points to the 'Credentials' link.</p>
2	Click on the Credential link	 <p>The screenshot shows the same interface as the previous step, but with the 'Create Credential' link highlighted by a red arrow. Below the 'Credentials' link, the text 'There are no records to display.' is visible.</p>

CalJOBS process for Credentials, continued

Step	Action	Results
3	Complete all the data entries for all fields,	 <p>Credential Information</p> <p>* LWIA/Region: <input type="text" value="None Selected"/></p> <p>* Office Location: <input type="text" value="Select an LWIA/Region"/></p> <p>* Credential Received: <input type="text" value="None Selected"/></p> <p>Other Credential: <input type="text"/></p> <p>Credential Verification: Verify Scan Upload Link</p> <p>* Date Credential Received: <input type="text" value="(mm/dd/yyyy)"/> (mm/dd/yyyy)</p> <p>Associate to Training/Activity record: Search Activities/Services</p> <p>Agency Code: <input type="text"/> - <input type="text"/> Agency Code Search</p> <p>The Associate to Training/Activity field: this field is critical as it ties the provider to the Credential outcome.</p>
4	<ul style="list-style-type: none"> Bypass the remote signature section, and Click save. 	 <p>Remote Signature</p> <p>Applicant Signature: <input type="text"/> Capture Signature</p>

Recording Licenses, Certificates and Degrees

Introduction	This section provides guidance on recording customers' licenses, certificates and degrees in CalJOBS.
CalJOBS entries	License, certificate, and degree are entered into CalJOBS when training the participant completes the activity.
Case note verification in CalJOBS	<p>Customer who completes a training activity, the WDS will complete a case note with the following information:</p> <ul style="list-style-type: none">• Copy of the license, certificate and/or degree was obtained,• Where the participant completed the training,• Industry sector of the training completed,• When the completed the training, including, and• The license, certificate and/or degree has been uploaded into CalJOBS.

Closure Process for Outcomes

Introduction A closure is the closing of a program and not the closing of an activity. Closure is a manual process completed by staff. This section provides information on the closure process the America's Job Center of California (AJCC) staff will complete when an individual case record needs to be closed due to employment.

Closure process Closure process is the closing of an individual's case. Complete the closure process when a participant finds part-time or full-time employment. By completing a closure activity, CalJOBS allows staff to use the follow-up keys ("F" keys) to issue supportive services (i.e. gas cards, purchase of tools, clothing, etc.).

Closure is considered one of the following:

- Inactivity of 90 days (soft exit, no action required)
 - Loss of Contact
 - Customer no longer wants services
- Employment
- Exclusionary Individual

Notes:

- All of the customer's activities must be closed prior to Case Closure, and
- Post-test scores with results must be posted prior to Case Closure.

Process It is important outcomes are completed and entered on a timely basis into CalJOBS as this affects the performance measures for WDD. AJCC staff will complete the steps outlined in the table below the closure process.

Step	Action
1	<ul style="list-style-type: none">• Go to the WIOA application,• Expand the WIOA application to view all the options, and• Expand the Closure option
2	<ul style="list-style-type: none">• Click on the Create Closure Link.
3	<p>Enter the following information on the General Information Tab:</p> <ul style="list-style-type: none">• Exit and Exit Reason – is pre-populated based on the last activity date.• Office location.• Agency Code.• Account closure/exit status.• Outcome Information – a selection of "None of the above or appropriate option" must be entered.• Employment Information<ul style="list-style-type: none">– If yes is selected, click the "Add Employer" link to enter employment information. Complete the fields with the most accurate information. <p>Example: employed as a roofer, 238160 code not NAICS code (Offices of Real Estate Agent and Brokers – incorrect).</p>
4	Click the Save button.
5	Complete case note using the Closure Case Note template .
6	<ul style="list-style-type: none">• Image all verification in case, and• Submit a Help Desk ticket, if applicable.

Closure Process for Exclusionary Individuals

Introduction	<p>This section provides information on the closure process the Youth Providers will complete when an individual case record needs to be closed due to an exclusionary exit.</p>
Exclusionary individual	<p>An exclusionary individual is someone who the state determined meets one (1) of six (6) exclusions and are excluded from the performance measures at the time of exit. The six (6) options for an exclusionary individual:</p> <ul style="list-style-type: none">• Institutionalized• Deceased• Reservist called to active duty• Health/Medical<ul style="list-style-type: none">– The participant is receiving medical treatment or providing care for a family member with a health/medical condition precluding entry into unsubsidized employment or continued participation in the program.– This does not include temporary conditions or situations expected to last for less than 90 days. <p>Examples: long term illness or serious physical injury</p> <ul style="list-style-type: none">• Foster Care and moved from one area by Foster Care system• Retirement <p>A case note must be completed for customers identified as an exclusionary individual.</p>
Outcomes/Exit	<p>It is extremely important outcomes are completed and entered on a timely basis into CalJOBS as this affects the performance measures for WDD.</p> <p>MIS Administrator will be responsible for entering the outcomes in CalJOBS when WDD staff determines the individual's closure is due to an "exclusionary exit".</p>
Verification	<p>Before outcomes to exclude an individual from the performance measures is entered, Workforce Development Department (WDD) staff must ensure verifications are scanned into CalJOBS:</p> <ul style="list-style-type: none">• Institutionalized – Court documents• Deceased<ul style="list-style-type: none">– Death Certificate– Obituary/News article– Doctor statement• Reservist called to active duty – DD214 form• Health/Medical<ul style="list-style-type: none">– In-patient paperwork– Doctor statement• Foster Care – Foster Care documentation• Retirement<ul style="list-style-type: none">– Retirement documentation– Self-attestation

Continued on next page

Closure Process for Exclusionary Individuals, Continued

Process

Youth Provider will complete the steps outlined in the table below for the closure process due to an exclusionary exit.

Step	Action
1	<ul style="list-style-type: none">Go to the WIOA application in CalJOBS,Expand the WIOA application to view all the options, andExpand the Closure option.
2	<ul style="list-style-type: none">Click on the Create Closure Link.
3	Enter the following information on the General Information Tab : <ul style="list-style-type: none">Exit and Exit Reason – is pre-populated based on the last activity date.Office location.Agency Code.Account closure/exit status.Outcome Information – a selection of “None of the above or appropriate option” must be entered.
4	Click the Save button.
5	Complete case note using the Closure Case Note template .
6	<ul style="list-style-type: none">Image all verification in case, andSubmit a Help Desk ticket. The subject line on the Help Desk ticket should read “Exclusionary Exit Outcome”.

Program Exits

Introduction

Exit is the last date of service for all programs and there are no future services scheduled. This section provides information about the program exits in the CalJOBS system.

Exit

An exit occurs when an individual is not expected to return to the Workforce Innovation and Opportunity Act (WIOA) program or when an individual is not receiving any services and is inactive for 90 days.

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

Example: Exit Clock date is June 1st; last staff-assisted activity the customer received was March 1st; therefore, exit date in CalJOBS will show as March 1st.

In CalJOBS, when the exit is initiated automatically, the exit reason is listed as “Soft Exit”,

Exit clock

The Exit clock refers to the 90 days in which an individual is not receiving any services.

Any Self-service, information-only, follow-up, and supportive services do not extend the Exit Clock. A customer must receive a staff-assisted service to restart the clock in CalJOBS.

Note: Refer to the *CalJOBS Activity Codes Detailed Listing – Individual* to determine if an activity will re-start the clock. The list includes a column titled “Exit Clock”; this will indicate whether an activity restarts the Exit Clock. If the value is “yes” and a service code is added to an individual’s program application in CalJOBS, the 90 day Exit Clock will be reset.

Exit report

Exit report is essential and AJCC supervisor/manager should pull an exit report on a monthly basis from CalJOBS. Pulling the report will ensure Youth Providers assess his/her caseload each month and identify participants who need to be reached out to prior to exit. This should help AJCC supervisor/manager to fully focus on the success plan for a participant.
