CalJOBS Help Sheet 11

How to Create Follow-Ups in CalJOBS

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How to Create Follow-Ups in CalJOBS

This is a step-by-step guide on how to properly create, view, modify, and complete participant follow-ups in CalJOBS.

The **Follow-Up** section will automatically appear under the participant's WIOA application, once the applicant has exited the system. The system allows for **four follow-ups every quarter after exit**. Follow-Ups are due to be completed at the end of each quarter.

For example:

Closure Created: 7/22/2021 – During First Quarter of Fiscal Year

Participant Soft Exits: 10/22/2021 – During Second Quarter of Fiscal Year (Note: '**Exit date**' is marked as 7/22/2021)

First Follow-Up Due Date: 12/31/2021 – End of Second Quarter of Fiscal Year

Creating a Follow-Up:

1. Once you have located the participant's WIOA application, expand their information by clicking on the (+) located to the left of the WIOA application link.

   Note: Make sure you are selecting the correct application when doing a follow-up as participants may have multiple applications.

Title I - Workforce Development (WIOA)			Apps: 1

Create Title I - Workforce Development (WIOA) Application

WIOA #2248352 - Case Exited

LWDB:	13 - Los Angeles County WDACS	Application Date	06/22/2021
Onestop:	2703 - LAO Community and Senior Services	Participation Date:	06/24/2021
		Closure Date:	N/A
Open/Total Activities:	0 / 1	Exit Date:	06/24/2021

Once expanded, scroll down to the **Follow-ups** section and expand it by clicking the (+) sign. If the participant has exited, four Follow Ups should be displayed with their statuses.

Follow-ups			4

Create Local Follow Up

Search:

Required By	Date Complete	Status	Follow Up Type
03/31/2020		Required	1st Quarter After Exit
06/30/2020		Required	2nd Quarter After Exit
09/30/2020		Required	3rd Quarter After Exit
12/31/2020		Required	4th Quarter After Exit

2. Click into a follow up under the **Follow Up Type** column, in order to complete the follow up.

3. The first section is the **General Information** section. The information in these fields should be automatically filled in based on the WIOA Application.

4. If you have any **Alternate Contact Information** for the participant, you may add a new contact by clicking on "**Manage Alternate Contacts**".

5. You can record contact attempts in the **Contact Attempt** section. We recommend attempting to contact the participant at least three throughout a quarter before a follow-up can be completed with **"Cannot Locate"** in the **Status at Follow-Up** field.

Contact Attempts

Attempt Number	Date	Time	
No contacts have been attempted.			

Add Contact Attempt   Exit Follow-up Screen

Create New Contact Attempt

* Contact Date: [   ] Today

* Time of Day: None Selected ▼

* Type Of Contact: None Selected ▼

Other Description: [   ]

Save Contact Attempt   Cancel

6. **Follow-up Employment Information**: This is a crucial section in a follow-up. Specify if the participant worked this quarter and add employers if you select "**Yes**".

   a. Once you select "**Add Employer**", a pop-up page will show **Employer** and **Job Information**. Although not all fields are required (*), please enter as much information as possible, especially the **NAICS code** and **Occupation Code**.

   b. You may click on "**Search Individual Employment History**" to show suggested employment information or "**Select from Internal Job Order/Placement**" to view previous employment entered for the participant.

Add/Edit Employer

Employer Information

Search Individual Employment History   Select from Internal Job Order/Placement

*Employer Name:

*Verify Employer Name: [Verify | Scan | Upload | Link]

Employer FEIN:

Address Line 1:

Address Line 2:

City:

State/Province: None Selected

County/Parish:

Zipcode:

Find Zip Code: [USPS]

Country: None Selected

Industry Code (NAICS):   Search for NAICS Code

*Industry NAICS Code:

Industry NAICS Description:

*Primary Employer Contact Name:

*Primary Employer Contact Phone Number: [ ] - [ ] - [ ] Ext [ ]

Primary Employer Contact Email:

Is this employer a federal contractor? ○ Yes ○ No

c. In the Job Information sections, enter the '**Job Title**', '**Occupation**' and the other job-related information. Click "**Save**" to finish entering employment information.

Job Information

* Job Title:

* Occupation: Select Occupation

* Is this a green job?   ○ Yes ○ No

* Hours Worked per Week:

* Hourly Wage:

* Job Start Date:

• Job End Date: □ Currently Employed

• Reason for Leaving: None Selected   ▼

Additional Information on reason for   Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.
leaving:

[Clear Text]

Job Duties (2500 characters max):   Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.

[Insert Occupational Description | Clear Text]

* Primary Employer: ○ Yes ○ No

* Receiving Fringe Benefits: ○ Yes ○ No

  Receiving Health Care Benefits: ○ Yes ○ No

* Job Covered by Unemployment   ○ Yes ○ No
  Compensation:

* Is this Entrepreneurial and/or Self- ○ Yes ○ No
  Employment?:

* Is this a Registered Apprenticeship? ○ Yes ○ No

* Is this active Military Service?   ○ Yes ○ No

* Is this considered   ○ Yes ○ No
  Non-Traditional Employment?

Is this considered Training Related   None Selected   ▼
Employment?

Add to Employment History: ○ Yes ○ No

Save   Cancel

Training Related Employment:

You may not modify the training related employment question because this is system set by matching the ONET code of the employment information to the training activity ONET code. If you believe a job should result in training related employment, please contact CalJOBS Tech Support for assistance.

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7. The **Follow-Up Education Information** section will allow you to enter any educational outcomes for the participant.

Follow-up Education Information

Previous Follow-up Education Placement and Date Information:	Not Applicable
*Education in Quarter 1/1/2020 - 3/31/2020:	None Selected ▼
Date of Education Placement:	[____] 📅 Today

[**Verify** | **Scan** | **Upload** | **Link**]

8. The **Exit and Closure Information** section should auto-populate based on the **Closure** form.

Exit and Closure Information

Exit Date:	01/13/2020
Employment Status:	
Youth Status at Exit:	Not Applicable
Placement Status at Exit:	Not Applicable

9. In the **Current Status at Follow-up** section, please provide the current status when following up with a participant. Please note that the '**Follow-up Status**' is required only when no employment, no youth placement and no youth diploma/credential is recorded on the follow-up screen.

Current Status at Follow-up

Follow-up Information:

*Actual Date of Follow-Up:	[____] 📅 Today
*Contact Type:	None Selected ▼
Other (specify):	[____]

Follow-up Status

This section is required only when no employment, no youth placement and no youth diploma/credential is recorded on the follow-up screen.

Status at Follow-Up:	None Selected ▼
Other (specify):	[____]
Comments:	[____]

10. In the **Staff Information** section, the participant's '**LWIA/Region**', '**Office Location**' and '**Agency Code**' should be chosen from the drop-down menus, to correctly reflect the participant's information. Click "**Save**" when completed.

(Note: Los Angeles County requires that an Agency Code must be entered, even though the system does not require it.)

Once you hit save, you will be taken back to the WIOA Application screen where you can check the status of the follow-up. Make sure that you have a '**Completed**' status on the follow up you just completed.

This means you are done with the **Follow-Up**.

Required By	Date Complete	Status	Follow Up Type
03/31/2020	02/19/2020	Completed	1st Quarter After Exit
06/30/2020		Required	2nd Quarter After Exit
09/30/2020		Required	3rd Quarter After Exit
12/31/2020		Required	4th Quarter After Exit

Important Things to Remember:

1. **Follow Ups must be completed in a timely manner and always *before* their due date**, in order to collect accurate information for the specified quarter.

2. **Set alerts**. You can set alerts in CalJOBS, to let you know when follow ups are close to being due, so that you can contact the participant and complete the follow up during the appropriate quarter. If you need help setting alerts, please contact your Manager or CalJOBS Tech Support for assistance.

3. **Employment information should reflect any employment within the follow up quarter.** If the participant worked at least one day during the follow up quarter, the follow up should be entered with employment.

4. **Completing follow ups are required to meet contractual obligations.**