



WORKFORCE DEVELOPMENT
AGING & COMMUNITY SERVICES



CalJOBS Help Sheet 17

Creating Alerts in CalJOBS

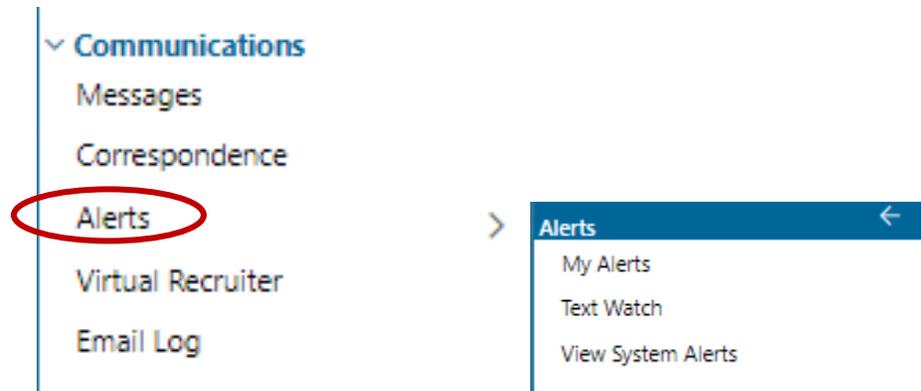
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How to Create Alerts in CalJOBS

This Help Sheet provides a step-by-step guide on how to create alerts in CalJOBS, an essential tool in case management. **Alerts** can be created based on a variety of criteria, and the Alert will appear as a notification when you log in to CalJOBS.

Creating an Alert:

1. To add or view an existing **Alert**, click on “**My Alerts**”.



2. If you created alerts in the past, the next page will show your current alerts.

Workforce Innovation and Opportunity Act (WIOA) Alerts				
Alert Description	Days	Notify	Create Date	Action
Individual # of Days Since Last Workforce Innovation Opportunity Act (WIOA) Activity	7 days since	Once	01/09/2020	Delete
WIOA Activity Projected End Date	15 days prior	Everyday	01/09/2020	Delete
WIOA Activity Projected Start Date	30 days prior	Everyday	01/09/2020	Delete
WIOA Followup Alert	60 days prior	Once	01/09/2020	Delete
WIOA Literacy Numeracy Post-Test has not been posted	30 days prior	Once	01/09/2020	Delete
WIOA Male Participants about to turn 18	1 day prior	Once	01/09/2020	Delete
WIOA Soft Exit	5 days prior	Everyday	01/09/2020	Delete

Trade Adjustment Assistance (TAA) Alerts			
Alert Description	Days	Notify	Create Date
Individual # of Days Since Last Trade Adjustment Assistance (TAA) Activity	7 days since	Once	01/09/2020

Generic Program Alerts				
Alert Description	Days	Notify	Create Date	Action
Individual # of Days Since Last Generic Program Activity	7 days since	Once	01/09/2020	Delete

IEP Alerts				
Alert Description	Days	Notify	Create Date	Action
IEP Objectives Alert	5 days prior	Once	01/09/2020	Delete

Click a “Delete” link to delete that particular subscription.

Modify My Alert Subscriptions

- To edit any of the existing subscriptions, or start a new subscription, click on the **“Modify My Alert Subscriptions”** button.
- You will now be directed to a list of available alerts that are categorized by type, such as WIOA, WP, CRM, etc. In order to subscribe to your desired alerts, you must click on the check box located to the **left of the Alert Description**. Then, select the number of **Days** before the event that the alert should appear. Lastly, select when you would like to be **notified** by CalJOBS, on the day of the event or everyday after the alerts until the event is addressed.

Workforce Innovation and Opportunity Act (WIOA) Alerts			
Alert Description	Days	Notify	
<input checked="" type="checkbox"/> WIOA Activity Projected Start Date This alert will notify you when an Individual in your case load has a projected WIOA activity start date that is about to occur.	30 days prior	<input type="radio"/> On the day only <input checked="" type="radio"/> Everyday after	
<input checked="" type="checkbox"/> WIOA Activity Projected End Date This alert will notify you when an Individual in your case load has a projected WIOA activity end date that is about to occur.	30 days prior	<input type="radio"/> On the day only <input checked="" type="radio"/> Everyday after	
<input checked="" type="checkbox"/> WIOA Soft Exit This alert will notify you when an Individual in your case load is about to soft exit from the WIOA program.	1 day prior	<input type="radio"/> On the day only <input checked="" type="radio"/> Everyday after	
<input checked="" type="checkbox"/> WIOA Male Participants about to turn 18 This alert will notify you when an Individual in your case load is about to turn 18 years of age.	1 day prior	<input type="radio"/> On the day only <input checked="" type="radio"/> Everyday after	

- Once your selections are made, remember to click on the **“Save”** button located at the bottom of the page. CalJOBS will then let you know that your alert subscriptions have been updated.

- The next time you log-in to CalJOBS, a pop-up window will appear upon login to display any alert that has been activated.



- Click the link to open up your messages, where the alerts will be listed, similar to emails.

My Staff Messages

[Show Filter](#)

Shortcut Keys: Access Message Folders with Alt and/or Shift + O then arrow up or down.
 Access Messages with Alt and/or Shift + M.



Viewed Status	Attachments	From	Subject	Msg Date
<input checked="" type="checkbox"/>		POSTMASTER	WIOA Followup	03/23/2020 09:52 PM
<input checked="" type="checkbox"/>		POSTMASTER	WIOA Followup	03/22/2020 09:52 PM
<input checked="" type="checkbox"/>		POSTMASTER	WIOA Followup	03/21/2020 09:50 PM

- Click one of the messages to view the alert. You'll be able to access the case file directly from the alert message by clicking the link under the **Action** column:

FROM: POSTMASTER
CREATED BY: POSTMASTER
SENT: Monday, March 23, 2020 9:52:00 PM

TO: Alexis Camins
SUBJECT: WIOA Followup

TUESDAY, 3/24/2020

The following individual(s) in your case load have WIOA followup activities that are nearing within 60 day(s) as of 3/24/2020.

App Num	Username	Name	Vet	Followup Type	Required Date	Actions
18418293	29843649	SARA, CHERYLYNN	NA	3rd Qtr Follow-up	3/31/2020	Programs
19340214	29843649	SARA, CHERYLYNN	NA	1st Qtr Follow-up	3/31/2020	Programs

- You can also view your Alerts at any time, by going to **My Staff Dashboard > My Messages > Unread Messages**.

The screenshot shows the 'My Staff Dashboard' interface. At the top, there are navigation tabs: 'My Staff Dashboard' (highlighted with a red box), 'My Staff Resources', 'My Staff Account', and 'Directory of Services'. Below the tabs, there are two main sections. The left section is titled 'Saved Lists' and contains a list of individuals and employers assisted, along with a filter dropdown set to 'Individuals' and a table with columns 'List Title' and 'Create Date'. The right section is titled 'Active Case Load' and shows counts for WP, WIOA, TAA, and GEN, with a 'Total Case Load' of 0. Below this is a 'My Messages' section (highlighted with a red box) showing '178 Unread Messages' (highlighted with a red arrow) and '34 Read Messages'. At the bottom of the messages section is a link to 'Enter the Message Center'.

How to Add Text Watch Alerts

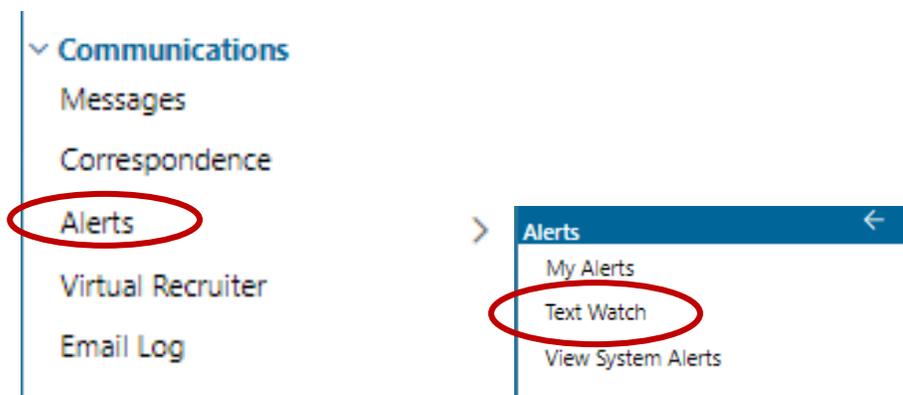
Another type of alert available in CalJOBS is the **Text Watch Alert**. A **Text Watch Alert** allows you to get an alert based on a keyword on a specific area in the system, such as the **'Message Center Inbox'** or **'Job Orders'**.

To add a Text Watch Alert, ensure that you are subscribed to the desired alert by following steps 1, 2, and 3 on **How to Add Alert Subscriptions** above.

Then, navigate towards the "Miscellaneous Alerts" section and make certain that the "Text Watch Alert" checkbox is checked and the desired options from the "Notify" column are selected. If changes are made, click on the "Save" button.

Miscellaneous Alerts			
Select	Alert Description	Days	Notify
<input checked="" type="checkbox"/>	Text Watch Alert This alert will notify you when text flagged for alerting is detected in items having been created or modified in the past 24 hours in the selected area(s).	N/A	<input type="checkbox"/> Message Center Inbox - Individuals <input type="checkbox"/> Message Center Inbox - Employers <input type="checkbox"/> Job Orders - Internal <input type="checkbox"/> Job Orders - External

1. Once you subscribe to the **'Text Watch Alert'**, locate and hover over the **'Alerts'** option in the **Communications** section in the left navigation panel, and select **"Text Watch"** to configure your Text Watch Alert.



- CalJOBS will then take you to a screen that shows a list of available “Text Watch Alerts” that have been previously created (if any).

Text Watch Alert Subscription Options

Status: **ENABLED**
Click [here](#) to change your subscription status.

[Preview Alert](#)

Available Text Watch Alerts

[Filters](#)

Area(s) to watch:

- Message Center Inbox - Individuals
- Message Center Inbox - Employers
- Job Orders - Internal
- Job Orders - External

Text to watch	Area(s) to watch	Added by	Added on	Action
Auto Tested Warning2	Message Center Inbox - Employers Job Orders - Internal	8867557	2/18/2017 9:52:35 AM	Edit Delete
hhjjggffddvv	Message Center Inbox - Individuals Message Center Inbox - Employers Job Orders - Internal Job Orders - External	30901861	9/21/2018 2:42:30 PM	Edit Delete

[Add a new text watch entry](#)

[Return to Alerts Management](#)

- To create a new text watch entry, click on the “Add a new text watch entry” link located at the bottom of the list.
- Type the desired keyword in the ‘Text to watch’ field and select the areas where you would like CalJOBS to watch for the specified keyword.

Text Watch Information

*Text to watch:

*Area(s) to watch:

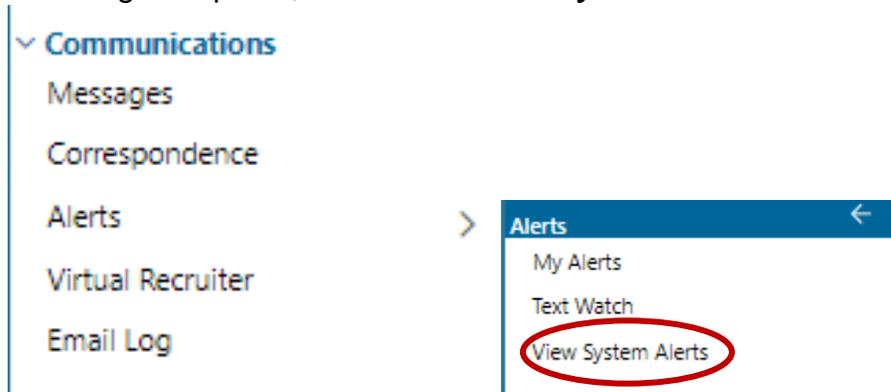
- Message Center Inbox - Individuals
- Message Center Inbox - Employers
- Job Orders - Internal
- Job Orders - External

- Click on the “Save” button at the bottom of the page, and the new text watch entry will be added to the list. The next time you log-in to CalJOBS, there will be a pop-up window that will display if any of your text alerts have been activated.

System Alerts

Only staff have access to **View System Alerts**. To view all the available system alerts in CalJOBS, follow the steps below.

1. Locate and hover over the **'Alerts'** option in the **Communications** section in the left navigation panel, and select **"View System Alerts"**.



2. CalJOBS will then show the list of **System Alerts**.

Results View: [Summary](#) | [Detailed](#)

System Alert	Recipient Type	Nightly Process	Enabled	Action
A recruiting employer has requested recruiting Access	Office	No	No	View
A request to apply to an external job	Office	No	No	View
A request to assist an employer	Multiple	No	No	View
A request to assist an employer	Staff	No	No	View
A UI type employer has registered or a Recruiting Employer has requested UI Access	Multiple	No	Yes	View
A WOTC type employer has registered or a Recruiting Employer has requested WOTC Access	Multiple	No	No	View
Agent / Employer relationship has been activated. Agent Alert	Staff	No	No	View
Agent / Employer relationship has been activated. Staff Alert	Multiple	No	No	View
Agent / Employer relationship has been deactivated. Agent Alert	Staff	No	No	View
Agent / Employer relationship has been deactivated. Employer Alert	Staff	No	No	View
Agent / Employer relationship has been deactivated. Staff Alert	Multiple	No	No	View
An out of state Workforce Agency has requested information regarding a WOTC application	Staff	No	Yes	View
Analyst Welcome Message	Analyst	No	Yes	View
Application Snapshot	Multiple	No	No	View
Appointment Reminder	Multiple	Yes	Yes	View
Automated Communication to Employers Regarding Hires and Placements	Employer	Yes	No	View
BENEFIT REDUCTION INFORMATION	Individual	No	Yes	View
Bulk Scan & Auto Save Complete – No Review Required	Multiple	No	Yes	View

You can change how you see the alerts list by clicking on the **"Summary"** or **"Detailed"** link.

3. Click on the “**View**” link in the right ‘**Action**’ column to see more details about that specific alert.

Alert Name: A recruiting employer has requested recruiting Access

Enabled: No

Alert Subject: A recruiting employer has requested recruiting Access

Alert Body:

##FIRSTNAME## ##LASTNAME## is requesting to be the recruiting representative for ##COMPANYNAME##.

Please review this employer and enable them for recruiting functionality if ##FIRSTNAME## ##LASTNAME## is the correct contact to be handling Recruiting issues for ##COMPANYNAME##.

[Return to System Alerts List](#)

This is a preview of a System Alert.

*Note: **System Alerts** can only be enabled or disabled by administrative users.*