WORKFORCE DEVELOPMENT
AGING & COMMUNITY SERVICES

CalJOBS Help Sheet 25

Using the Agency Defined Program in CalJOBS for Regional LA RISE

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How to use the Agency Defined Program for Regional LA RISE

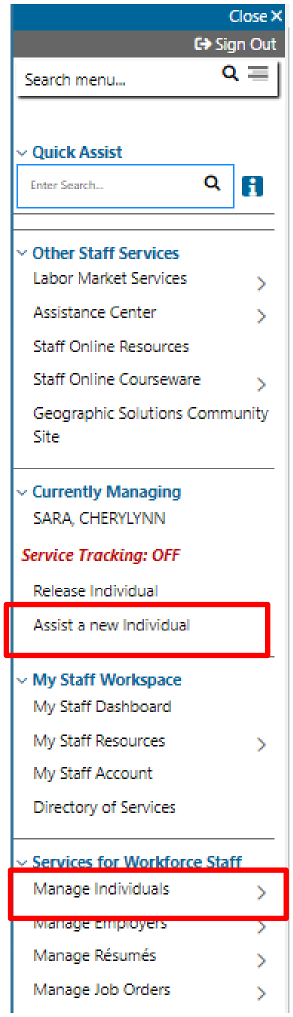
This help sheet describes how to create a new Regional LA RISE Application in CalJOBS, add case notes and activities, and how to close the application. The Regional LA RISE application is accessed through a participant's Agency Defined Program section.

Please note that a participant must first be registered in CalJOBS, before a Regional LA RISE application can be created.

For detailed instructions on How to Register a Jobseeker, please refer to Help Sheets 1 (How to Access CalJOBS) and 2 (How to Register a Jobseeker in CalJOBs).

How to Create a Regional LA RISE Application in CalJOBS

1. First, search for the registered individual using a unique identifier such as SSN or username by clicking "Assist a new Individual" or by using **Manage Individuals > Assist an Individual.**

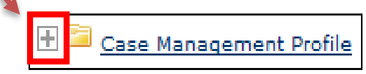


2. Once you click on the participant's name, the system will show a series of folders containing links within the each folder. The menus may or may not be expanded, but the image below shows an expanded view showing all the available options.

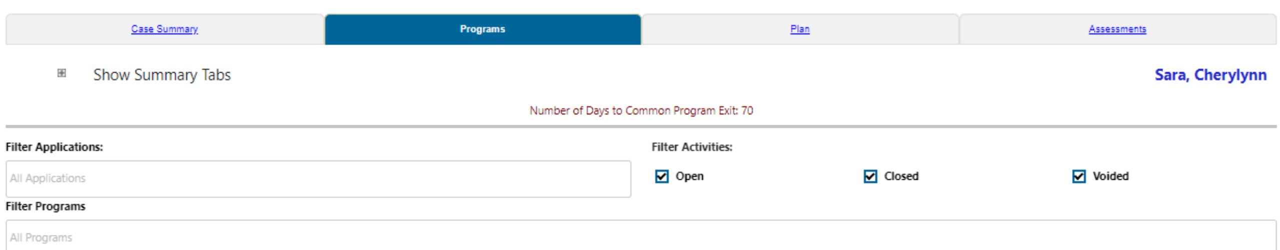
   To create a new Regional LA RISE application, navigate towards **Staff Profiles > Case Management Profile > Programs.**

Expanded view of the system folders

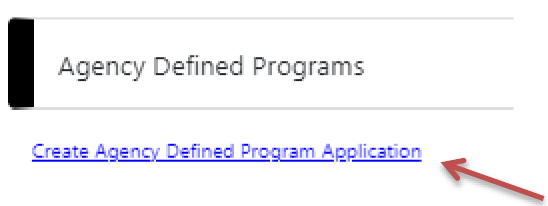
You can expand a folder by clicking on the (+) icon located to the left of the folder name.



3. Once you've accessed the individual's **Programs** tab, it will appear as one of four tabs, all under Case Management Profile.

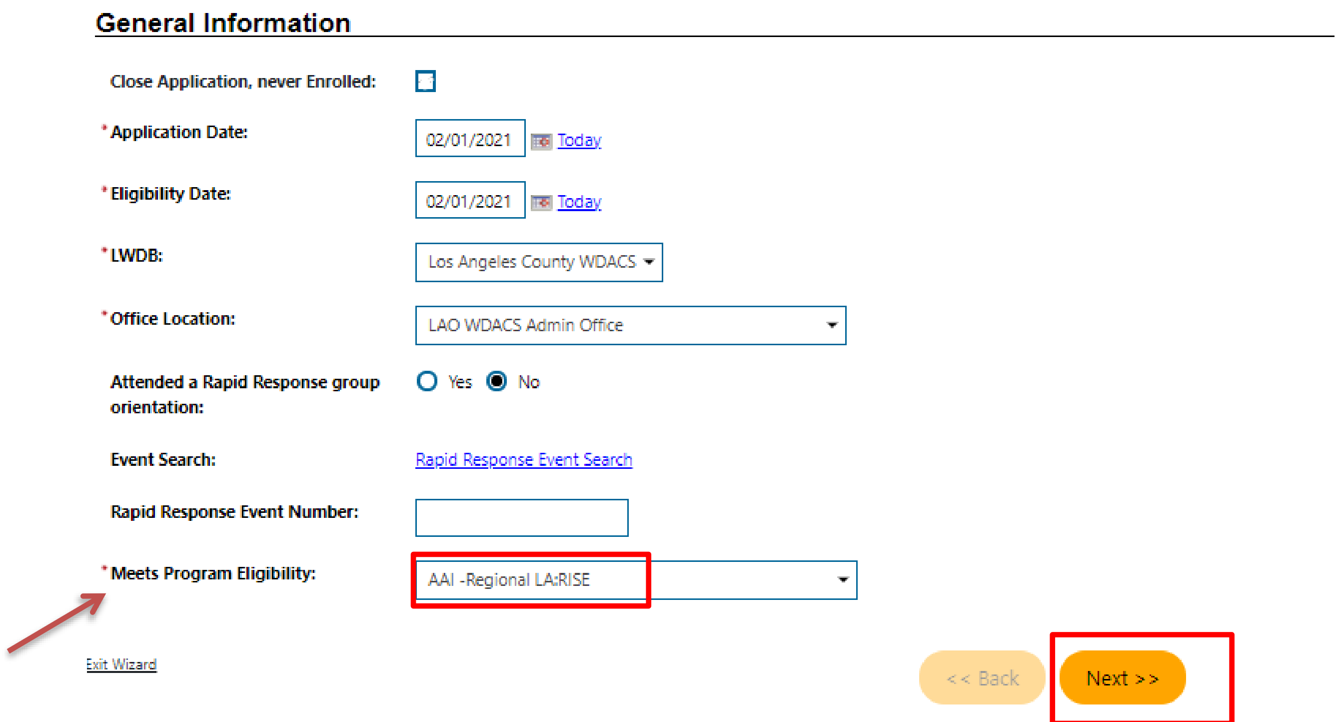


4. Next, scroll down to the **Agency Defined Program** section. Click on the "**Create Agency Defined Program Application**" link to create a new Regional LA RISE application.



5. The Regional LA RISE application consists of four tabs. In the **Start** Tab, the **Identifying Information** section will be pre-populated. However, you will need to enter Dates and confirm that the LWIA/Region and Office Location are correct in the **General Information** section.

6. For the **Meets Program Eligibility** field, select **AAI – Regional LA: Rise:**



7. Click the orange "**Next**" button at the bottom to continue.

8. In the **Contact** tab, most of the participant's information will be pre-populated from their registration, but it is a good idea to confirm and update any information that may have changed since registration.

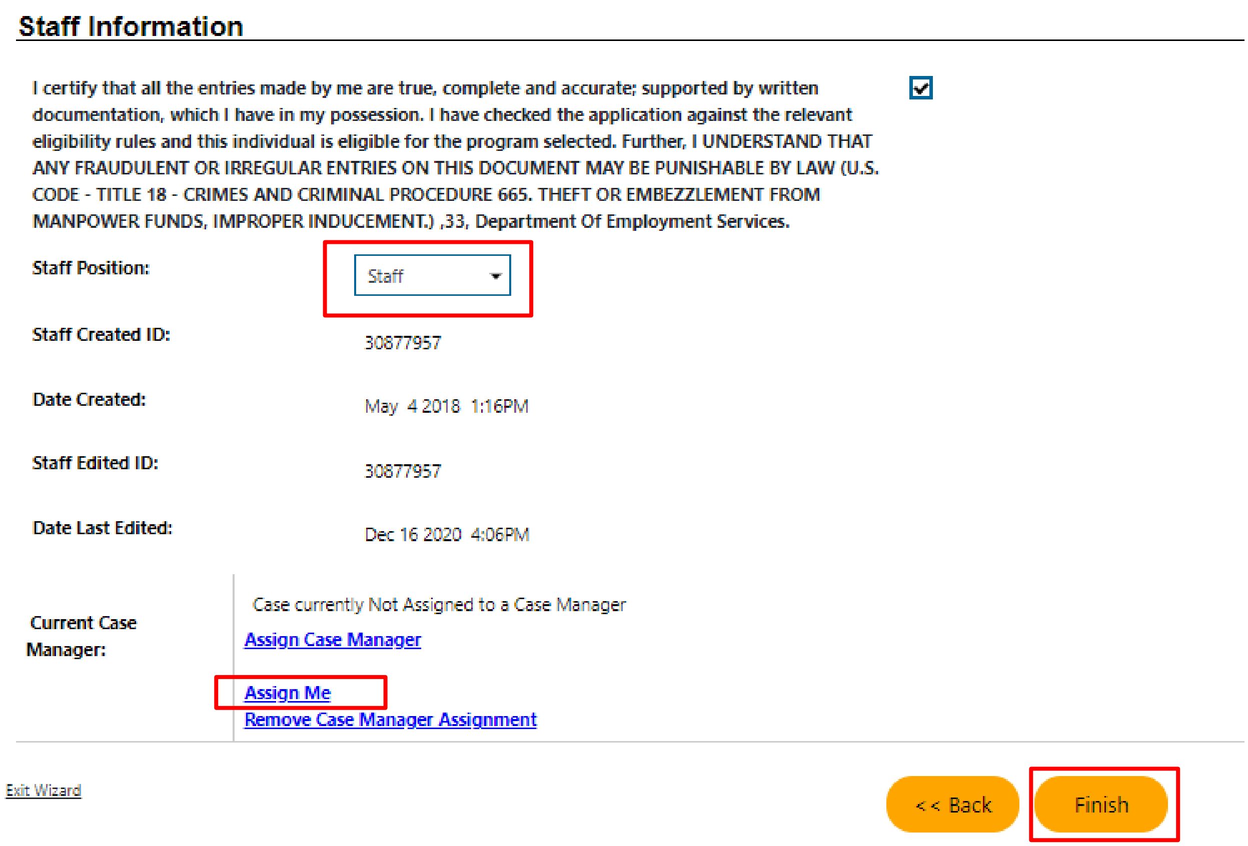
9. If everything is correct and current, click the orange "**Next**" button at the bottom to continue to the next tab.

10. The **Custom** tab contains the bulk of the Regional LA Rise application. Complete all the questions as instructed. Note that you will not be able to move forward until all required questions (marked with a red asterisk (*)) are completed.

    a. Fields that do not have the red asterisk are not required to be completed when you first create the application, though you may be required to **go back to the application to add this information as you work with the participant**. *Please consult Regional LA:RISE program guidance for further information regarding how and when certain questions are to be completed or updated.*

b. Once you have completed all required application questions, click the yellow **Next** button at the bottom to continue.

11. In the fourth and final tab, **Staff Information,** check that the **Staff Position** is correct to certify that all data you have entered is complete and accurate.

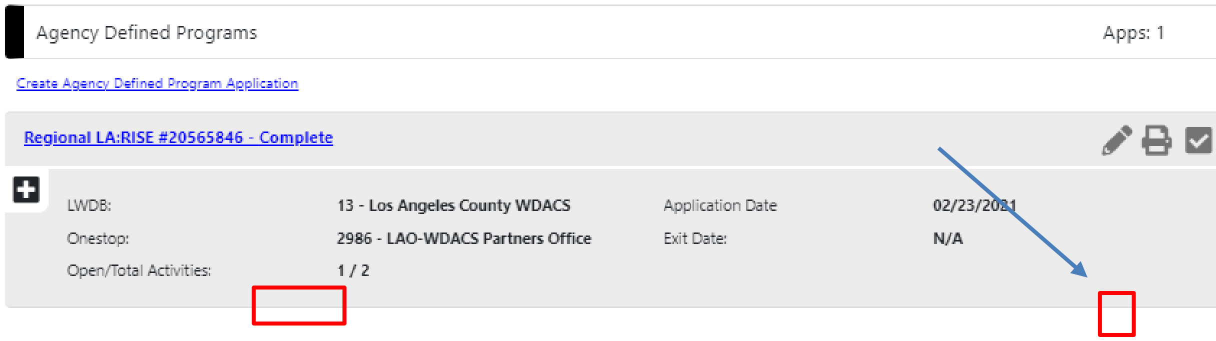


12. Click the "**Assign Me**" link to assign yourself as the participant's Case Manager under this application.

13. When ready, click "**Finish**" to save the data you have entered. The Regional LA:RISE application has been created!

    You will be taken back to the participant's **Programs** tab. Scroll down to the **Agency Defined Program** section to confirm that your newly created Regional LA:RISE application is visible with the status of Complete:

Click the pencil icon to edit or update any of the application questions.



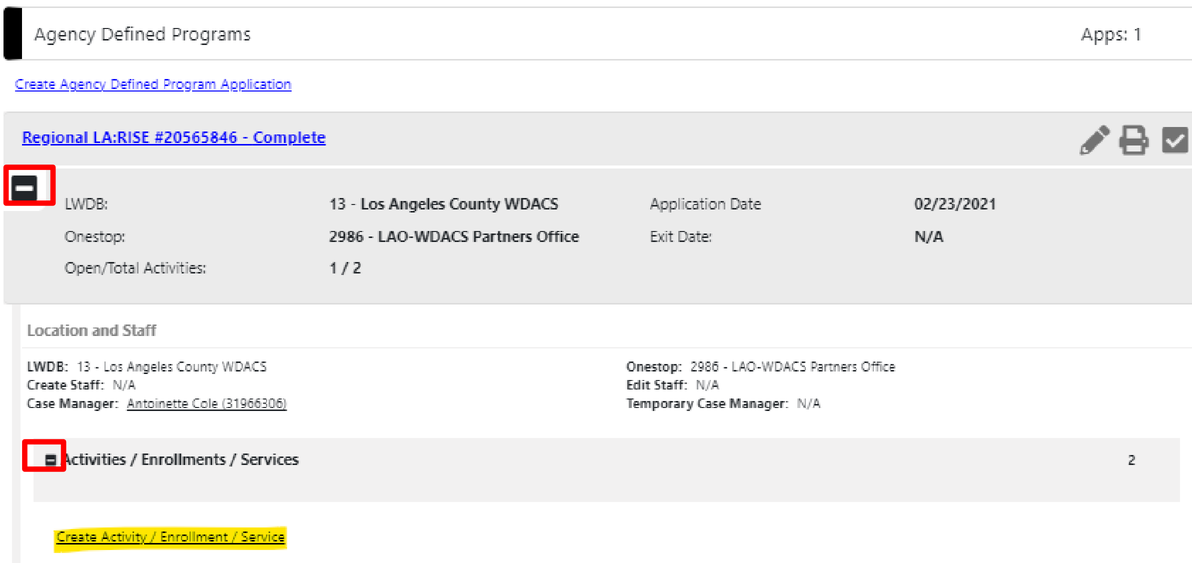
14. When you need to update any of the questions within the application, you may access and edit the participant's application by clicking the pencil icon.

How to Add Activities within the Agency Defined Program application

Once you have created a Regional LA RISE application in the agency defined program, you have the ability to record activities or services provided for the participant.

How to Add an Activity:

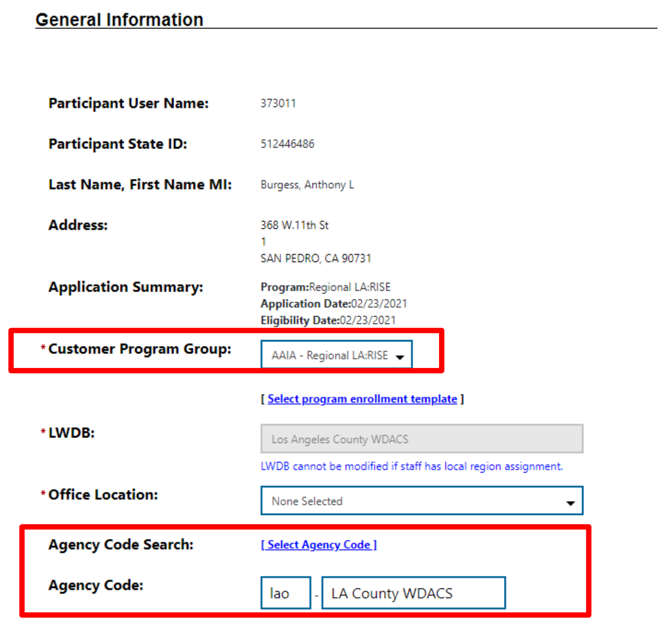
1. Once in the participant's Regional LA RISE application, expand the application sections by clicking the plus (+) icon.



2. Expand the **Activities/Enrollments/Services** section in the same way, then click **Create Activity/Service/Enrollment.**

3. In the **General** Information tab, confirm that the Customer Program Group is **AAIA – Regional LA: Rise** and that the LWDB and Office Location is correct.

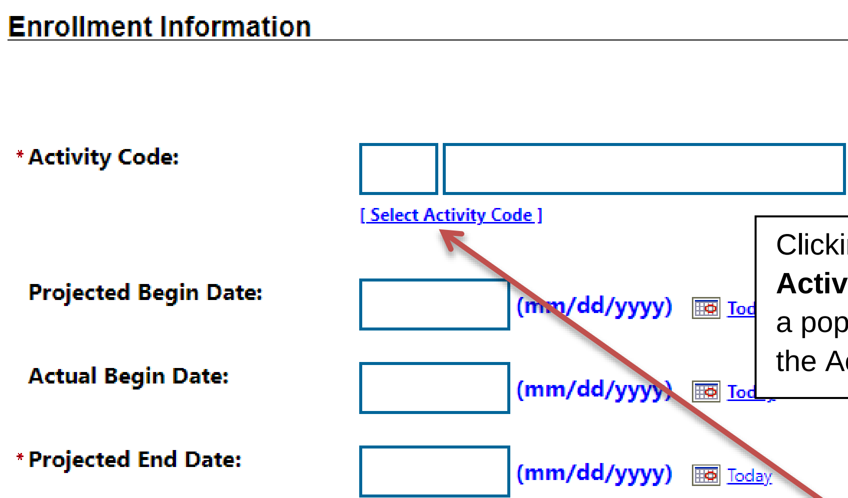
4. Next, click on "**Select Agency Code**" link next to Agency Code Search field to input the correct agency code. Search using 'LAO', to find the correct Agency Code. Inputting an Agency Code without using the search function will result in an incorrect entry.



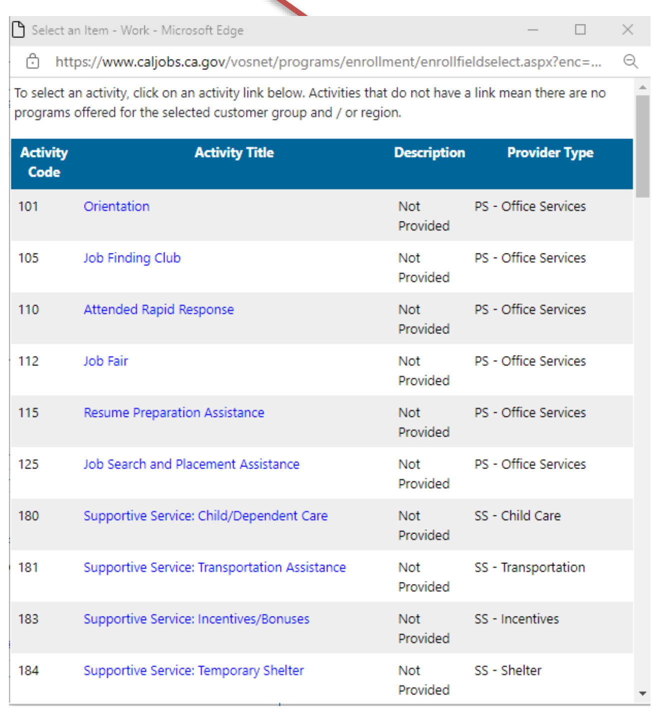
5. Scroll down to the **Enrollment Information** section**.**

    a. Click on the **Select Activity Code** link to select the appropriate activity for the enrollment. Make sure to include all dates for the activity.

    b. Enter the **Projected Begin Date, Actual Begin Date** and **Projected Begin date for the activity.** If it is a one day activity, all three dates would be the same.



Clicking on the "**Select Activity Code**" link will open a pop-up where you can find the Activity you wish to add.



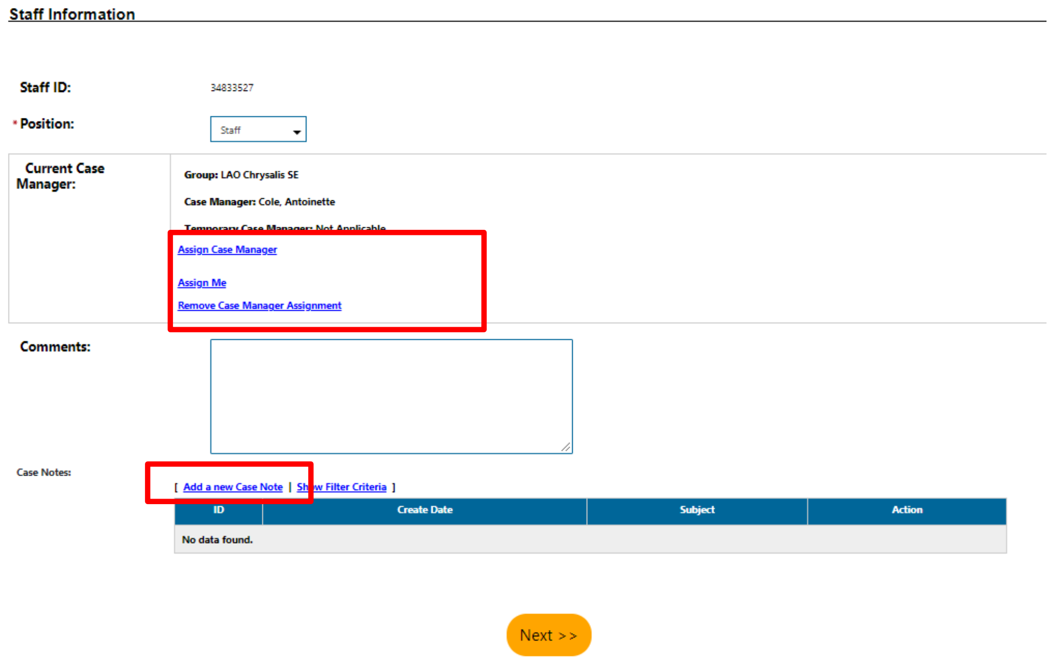
Activity Code	Activity Title	Description	Provider Type
101	Orientation	Not Provided	PS - Office Services
105	Job Finding Club	Not Provided	PS - Office Services
110	Attended Rapid Response	Not Provided	PS - Office Services
112	Job Fair	Not Provided	PS - Office Services
115	Resume Preparation Assistance	Not Provided	PS - Office Services
125	Job Search and Placement Assistance	Not Provided	PS - Office Services
180	Supportive Service: Child/Dependent Care	Not Provided	SS - Child Care
181	Supportive Service: Transportation Assistance	Not Provided	SS - Transportation
183	Supportive Service: Incentives/Bonuses	Not Provided	SS - Incentives
184	Supportive Service: Temporary Shelter	Not Provided	SS - Shelter

In the pop-up box, click the activity to select it.

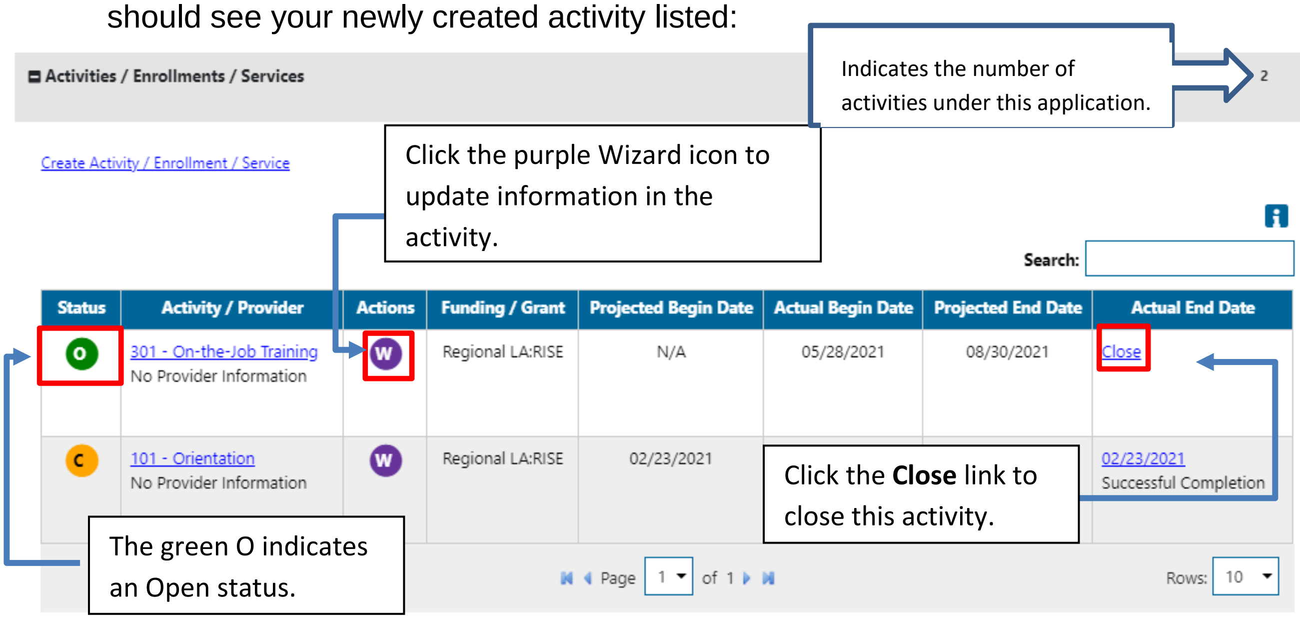
The pop-up box will automatically close, and the activity you selected will appear in the **Activity Code** field.

6. Scroll down to enter the **Staff Information**. If not already assigned, select "**Assign Me**" to assign yourself as the case manager for the individual.

7. Remember to "**Add a new Case Note**" for every activity you create. Detailed information on how to create a case note can be found in the following section of this Help Sheet.



8. Click the orange "**Next**" button at the bottom and the activity will be created.
9. Once the activity has been created, you can click the **Exit Wizard** link to return to the **Activity/Service/Enrollment** section of the agency defined program and you should see your newly created activity listed:

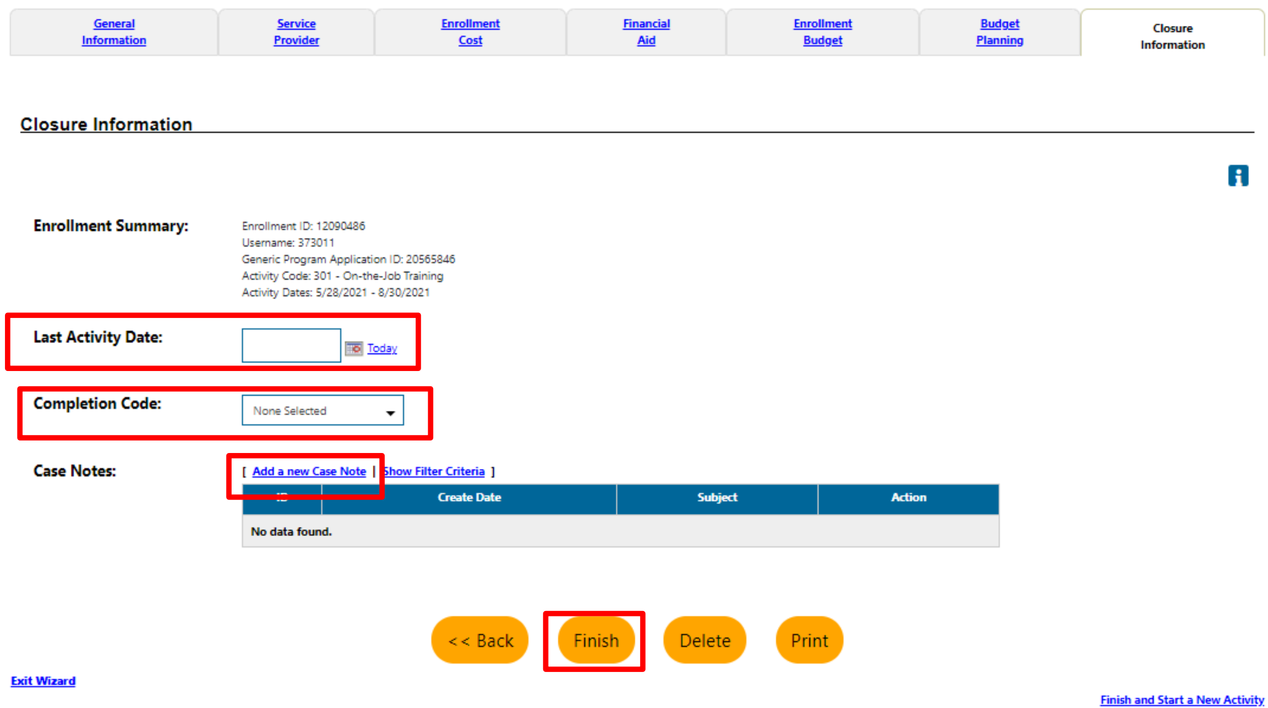


Closing an Activity:

Once the participant has completed the activity, the activity can be closed.

1. Locate the participant's record, expand the **Agency Defined Program** section and access the **Activity/Service/Enrollment** section.

2. Click the "**Close**" link under the **Actual End Date** column to go to the **Closure Information** tab directly.



3. Enter the **Last Activity Date,** which is when the activity was completed, as well as the **Completion Code.**

4. Remember to **Add a new Case Note**.

5. Click the orange "**Finish**" button to finish closing this activity, or the "**Finish and Create a New Activity**" on the bottom right hand corner to create a new activity immediately after finishing this activity.

Note: If you fail to close an activity, the system will automatically close the activity 30 days after the Projected End Date you entered, with the Completion Code of ***System Closed.***

How to Create Case Notes

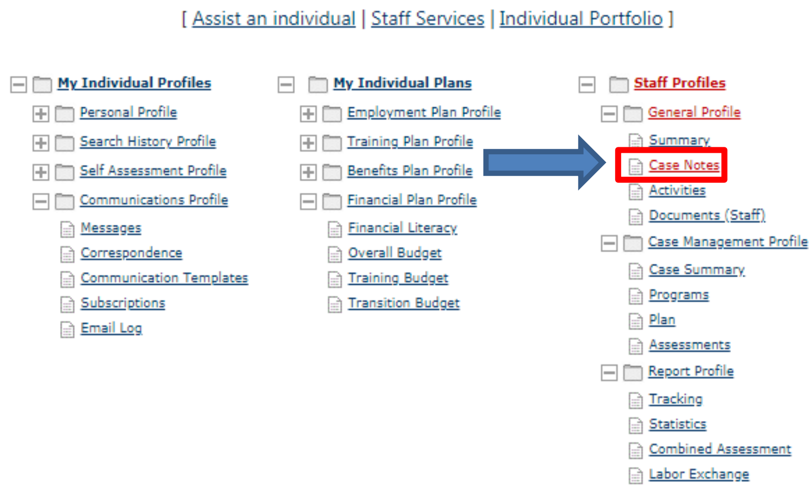
Case notes must be created every time you engage with the participant. There are two ways to create Case Notes:

1. You can create Case Notes within the application, activities or closures.

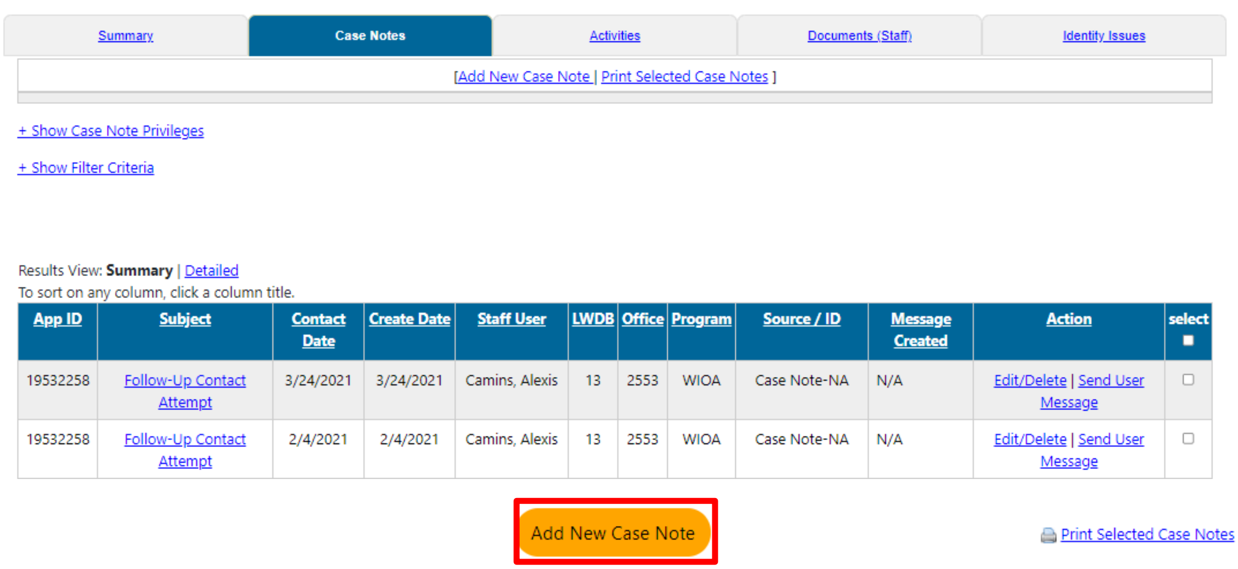
2. You can create a Case Note by accessing the participant's **Case Notes**:

   i. Find the participant using the **Assist an Individual** search.

   ii. On the folder at the top of the participant's case file, access **Staff Profiles → General Profile → Case Notes:**



   iii. You will see any previously created case notes for the participant listed. Click the yellow **Add New Case Note** button towards the bottom of the page to begin creating your case note.



Summary | Case Notes | Activities | Documents (Staff) | Identity Issues

[Add New Case Note | Print Selected Case Notes]

+ Show Case Note Privileges

+ Show Filter Criteria

Results View: **Summary** | Detailed

To sort on any column, click a column title.

App ID	Subject	Contact Date	Create Date	Staff User	LWDB	Office	Program	Source / ID	Message Created	Action	select
19532258	Follow-Up Contact Attempt	3/24/2021	3/24/2021	Camins, Alexis	13	2553	WIOA	Case Note-NA	N/A	Edit/Delete | Send User Message	
19532258	Follow-Up Contact Attempt	2/4/2021	2/4/2021	Camins, Alexis	13	2553	WIOA	Case Note-NA	N/A	Edit/Delete | Send User Message	

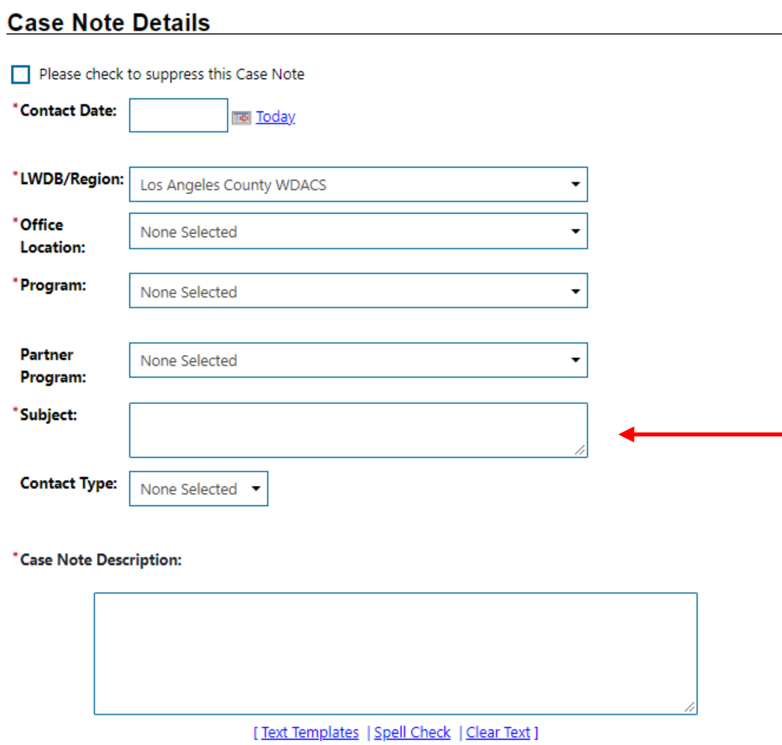
Add New Case Note

Print Selected Case Notes

Creating the Case Note

1. Enter the **Contact Date**.

2. Confirm that the **LWIA/Region** and **Office Location** information is correct.


Case Note Details

Please check to suppress this Case Note

*Contact Date: Today

*LWDB/Region: Los Angeles County WDACS

*Office Location: None Selected

*Program: None Selected

Partner Program: None Selected

*Subject:

Contact Type: None Selected

*Case Note Description:

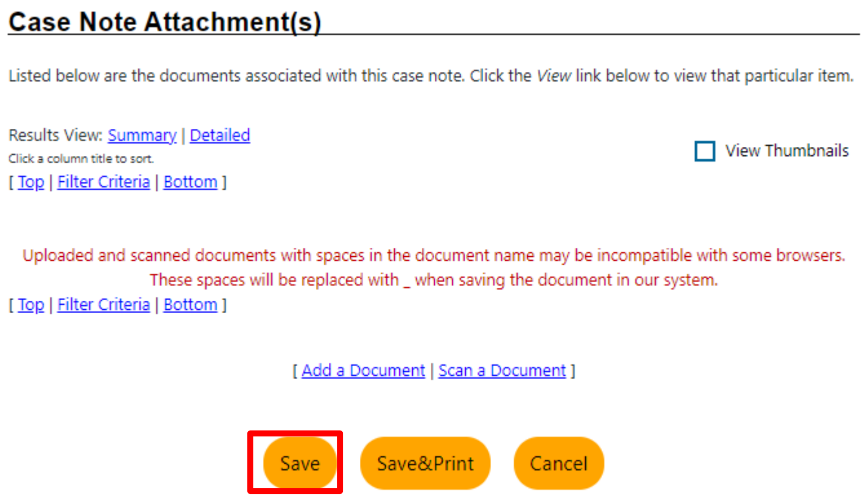
[Text Templates | Spell Check | Clear Text]

3. Select the correct **Program** the Case Note should be associated with.

4. The **Subject** or title should be specific and clear.

5. The **Case Note Description** should provide a detailed reason for the visit or interaction, the result of the visit of the interaction and any future action that needs to be taken by either the case manager or the participant.

6. Towards the bottom of the Case Note, you have the option of uploading a supporting document. Click the "**Add a Document**" link to upload a document to the Case Note.

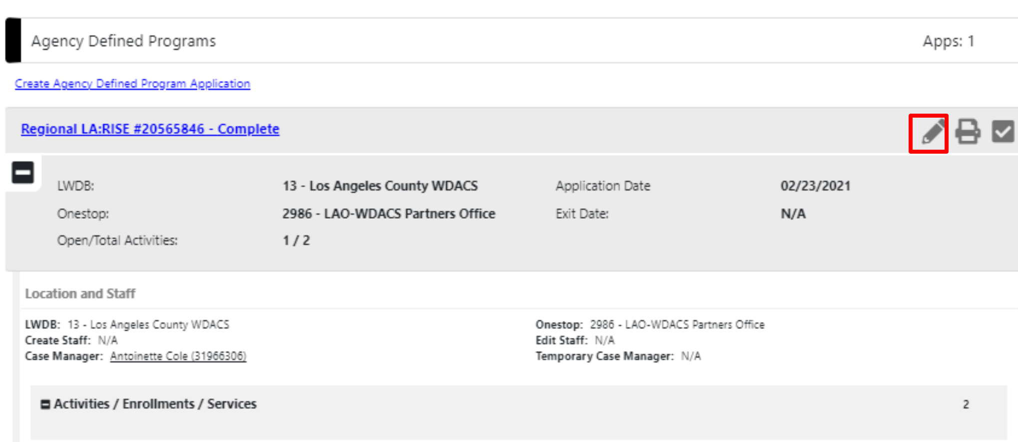


7. When you are ready, click the orange "**Save**" button at the bottom to save your Case Note. You can view all created case notes by going to **Staff Profiles → General Profile → Case Notes.**

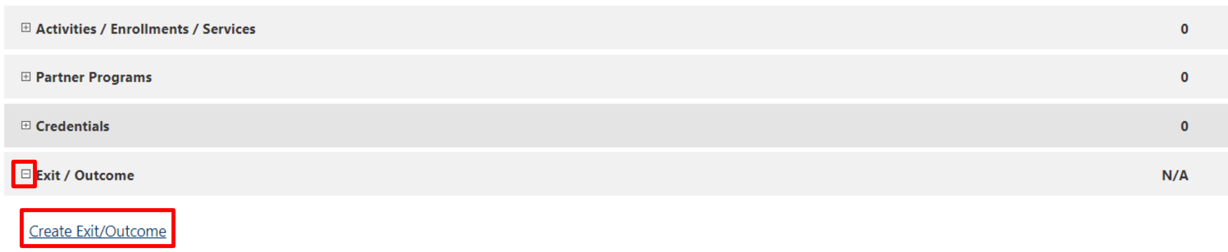
How to Close a Regional LA RISE application

At a point designated by the program design, a Closure must be created for the Regional LA RISE application. All activities must first be closed, before you can create a closure for the application itself.

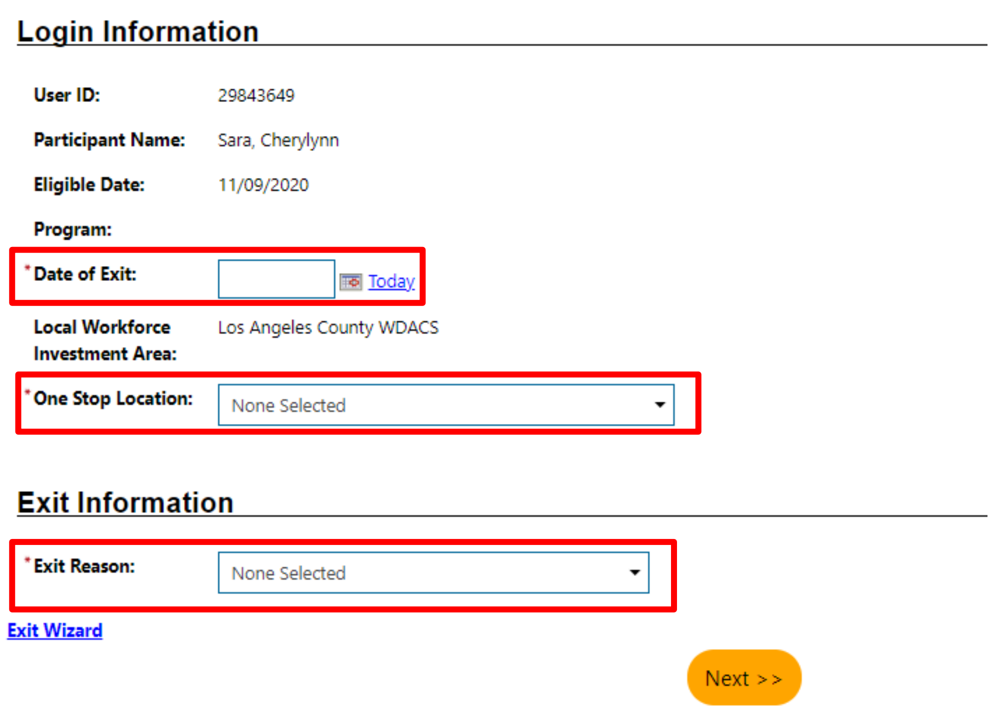
1. Access the participant's file and scroll down to the **Agency Defined Programs** section, under the participant's **Program Tab.** Click on the plus (+) sign in order to expand all the sections of the agency defined program.



2. Once the sections are expanded, navigate to the **Exit/Outcome** section and expand it using the plus (+) sign, then click **Create Exit/Outcome.**



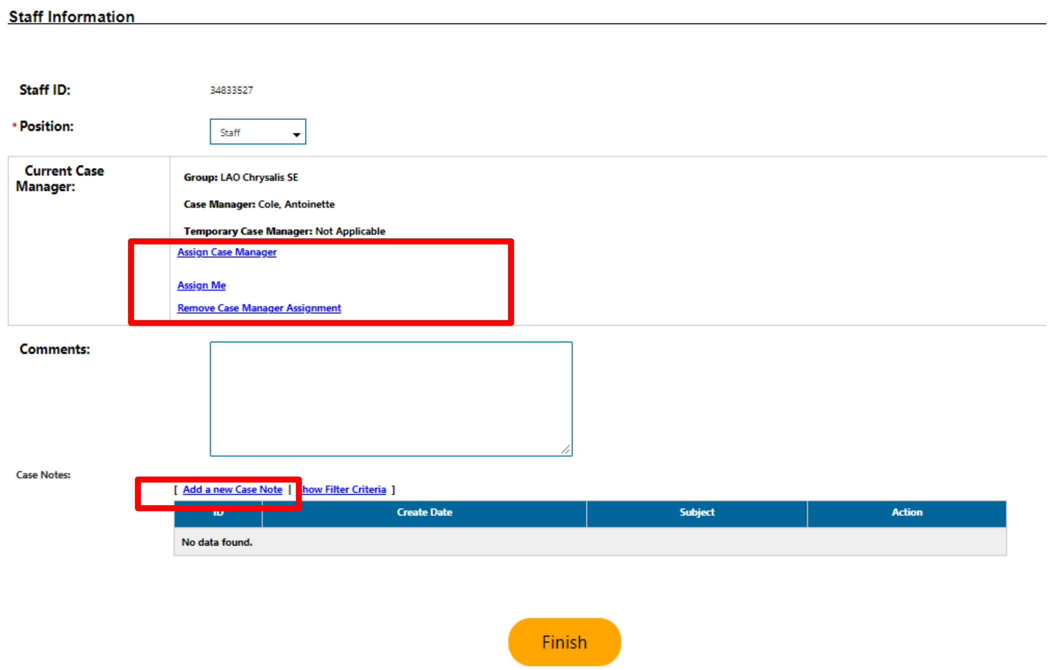
3. The **Exit/Outcome** consists of three tabs. In the first **General Information** tab, enter a date in the **Date of Exit** field. You can click the **Today** link to enter today's date. Also, confirm or select the **One Stop Location** and select the appropriate **Exit Reason**.



4. When finished, click the orange "**Next**" button to proceed.

5. Skip the **Employment Information** tab by clicking the orange "**Next**" button to proceed. (Employment Information will be recorded within the **Application Questions** in the Regional LA Rise application or in the participant's Title I application.)

6. In the third and final tab, **Staff Information**, add a Case Note by clicking the **Add a new Case Note** link..



7. Confirm or **Assign Case Manager**, then click the orange "**Finish**" button to complete the **Exit/Outcome.** The application is now closed.