



WORKFORCE DEVELOPMENT  
AGING & COMMUNITY SERVICES



# **CalJOBS Help Sheet 25**

## **Using the Agency Defined Program in CalJOBS for Regional LA RISE**

Prepared by: Data Management & Analytics Division

## 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.

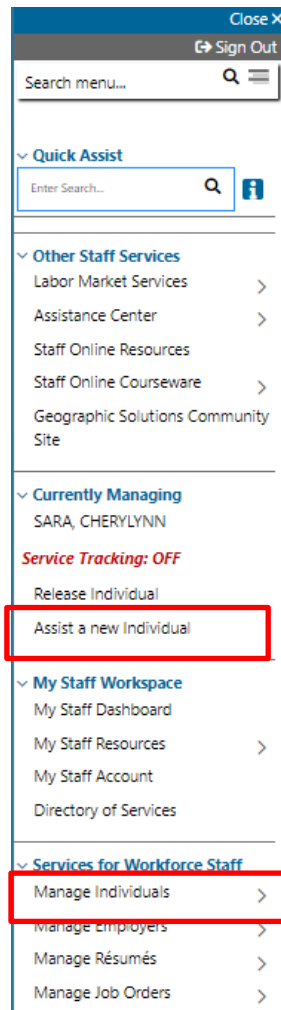
Please note that a participant must first be registered in CalJOBS, before a Regional LA RISE application can be created.

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.

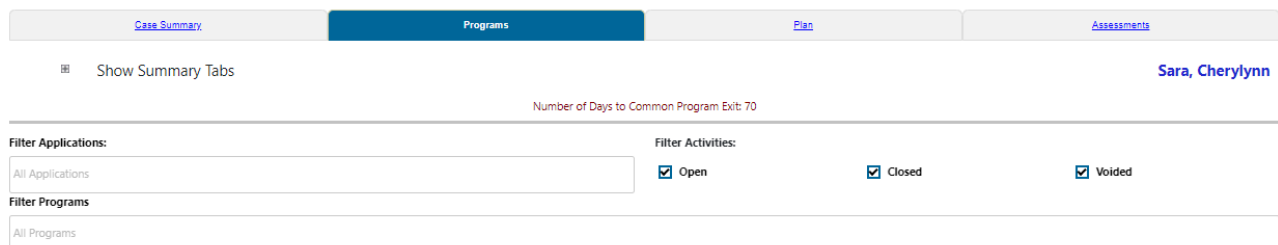
To create a new Regional LA RISE application, navigate towards **Staff Profiles > Case Management Profile > Programs**.

Expanded view of the system folders

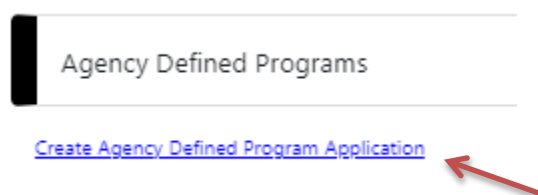


You can expand a folder by clicking on the (+) icon located to the left of the folder name.

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



- 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:**

### General Information

Close Application, never Enrolled: ☐

\* Application Date: 02/01/2021 [Today](#)

\* Eligibility Date: 02/01/2021 [Today](#)

\* LWDB: Los Angeles County WDACS ▼

\* Office Location: LAO WDACS Admin Office ▼

Attended a Rapid Response group orientation: ☐ Yes ☒ No

Event Search: [Rapid Response Event Search](#)

Rapid Response Event Number:

\* Meets Program Eligibility: AAI -Regional LA:RISE ▼

[Exit Wizard](#)

<< Back

Next >>

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.

### Staff Information

I certify that all the entries made by me are true, complete and accurate; supported by written documentation, which I have in my possession. I have checked the application against the relevant eligibility rules and this individual is eligible for the program selected. Further, I UNDERSTAND THAT ANY FRAUDULENT OR IRREGULAR ENTRIES ON THIS DOCUMENT MAY BE PUNISHABLE BY LAW (U.S. CODE - TITLE 18 - CRIMES AND CRIMINAL PROCEDURE 665. THEFT OR EMBEZZLEMENT FROM MANPOWER FUNDS, IMPROPER INDUCEMENT.) ,33, Department Of Employment Services.



Staff Position:

Staff

Staff Created ID:

30877957

Date Created:

May 4 2018 1:16PM

Staff Edited ID:

30877957

Date Last Edited:

Dec 16 2020 4:06PM

Current Case  
Manager:

Case currently Not Assigned to a Case Manager

[Assign Case Manager](#)

[Assign Me](#)

[Remove Case Manager Assignment](#)

[Exit Wizard](#)

<< Back

Finish




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.

Agency Defined Programs Apps: 1

[Create Agency Defined Program Application](#)

[Regional LA:RISE #20565846 - Complete](#)   

+	LWDB:	13 - Los Angeles County WDACS	Application Date	02/23/2021
	Onestop:	2986 - LAO-WDACS Partners Office	Exit Date:	N/A
	Open/Total Activities:	1 / 2		



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.

Agency Defined Programs Apps: 1

[Create Agency Defined Program Application](#)

**Regional LA:RISE #20565846 - Complete** ✎ 🖨️ ✓

LWDB:	13 - Los Angeles County WDACS	Application Date:	02/23/2021
Onestop:	2986 - LAO-WDACS Partners Office	Exit Date:	N/A
Open/Total Activities:	1 / 2		

**Location and Staff**

LWDB: 13 - Los Angeles County WDACS	Onestop: 2986 - LAO-WDACS Partners Office
Create Staff: N/A	Edit Staff: N/A
Case Manager: Antoinette Cole (31966306)	Temporary Case Manager: N/A

**Activities / Enrollments / Services** 2

[Create Activity / Enrollment / Service](#)

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.

#### General Information

**Participant User Name:** 373011

**Participant State ID:** 512446486

**Last Name, First Name MI:** Burgess, Anthony L

**Address:** 368 W.11th St  
1  
SAN PEDRO, CA 90731

**Application Summary:** Program:Regional LA:RISE  
Application Date:02/23/2021  
Eligibility Date:02/23/2021

**\* Customer Program Group:** AAIA - Regional LA:RISE

[\[ Select program enrollment template \]](#)

**\* LWDB:** Los Angeles County WDACS  
LWDB cannot be modified if staff has local region assignment.

**\* Office Location:** None Selected

**Agency Code Search:** [\[ Select Agency Code \]](#)

**Agency Code:** lao - LA County WDACS



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.

### Enrollment Information

\* Activity Code:

[\[ Select Activity Code \]](#)

Projected Begin Date:

 (mm/dd/yyyy) Today

Actual Begin Date:

 (mm/dd/yyyy) Today

\* Projected End Date:

 (mm/dd/yyyy) Today

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

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.

Select an Item - Work - Microsoft Edge

https://www.caljobs.ca.gov/vosnet/programs/enrollment/enrollfieldselect.aspx?enc=...

To select an activity, click on an activity link below. Activities that do not have a link mean there are no programs offered for the selected customer group and / or region.

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

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.

Staff Information

Staff ID: 34833527

\* Position:

**Current Case Manager:**

Groups: LAO Chrysalis SE  
Case Manager: Cole, Antoinette  
Temporary Case Managers: Not Applicable

[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

**Comments:**

Case Notes: [Add a new Case Note](#) | [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

Next &gt;&gt;

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:

Activities / Enrollments / Services

[Create Activity / Enrollment / Service](#)

Indicates the number of activities under this application. 2

Click the purple Wizard icon to update information in the activity.

Search:

Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
<b>O</b>	301 - On-the-Job Training No Provider Information	<b>W</b>	Regional LA:RISE	N/A	05/28/2021	08/30/2021	<a href="#">Close</a>
<b>C</b>	101 - Orientation No Provider Information	<b>W</b>	Regional LA:RISE	02/23/2021			<a href="#">02/23/2021 Successful Completion</a>

Click the **Close** link to close this activity.

The green O indicates an Open status.

Page 1 of 1

Rows: 10

## 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.

General Information	Service Provider	Enrollment Cost	Financial Aid	Enrollment Budget	Budget Planning	Closure Information
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**Closure Information**

Enrollment Summary: Enrollment ID: 12090486  
Username: 373011  
Generic Program Application ID: 20565846  
Activity Code: 301 - On-the-Job Training  
Activity Dates: 5/28/2021 - 8/30/2021

Last Activity Date:  [Today](#)

Completion Code:

Case Notes: [Add a new Case Note](#) [Show Filter Criteria](#)

Create Date	Subject	Action
No data found.		

< < Back **Finish** Delete Print

[Exit Wizard](#) [Finish and Start a New Activity](#)

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**.*

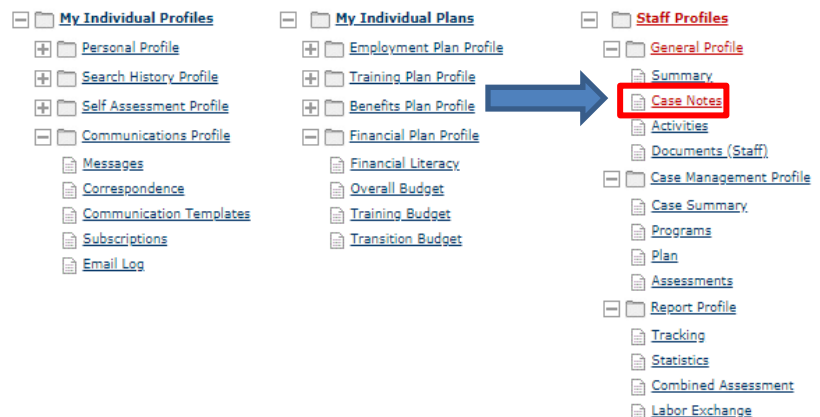
## How to Create Case Notes

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

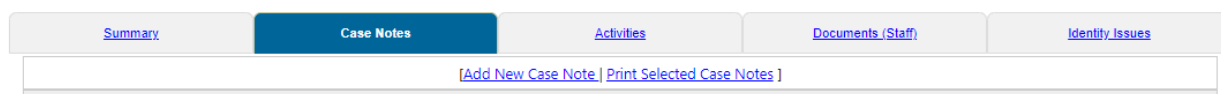
1. You can create Case Notes within the application, activities or closures.
2. You can create a Case Note by accessing the participant's **Case Notes**:
  - i. Find the participant using the **Assist an Individual** search.

[ [Assist an individual](#) | [Staff Services](#) | [Individual Portfolio](#) ]

- 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.



[+ 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	<a href="#">Follow-Up Contact Attempt</a>	3/24/2021	3/24/2021	Camins, Alexis	13	2553	WIOA	Case Note-NA	N/A	<a href="#">Edit/Delete</a>   <a href="#">Send User Message</a>	<input type="checkbox"/>
19532258	<a href="#">Follow-Up Contact Attempt</a>	2/4/2021	2/4/2021	Camins, Alexis	13	2553	WIOA	Case Note-NA	N/A	<a href="#">Edit/Delete</a>   <a href="#">Send User Message</a>	<input type="checkbox"/>

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:

\*Office Location:

\*Program:

Partner Program:

\*Subject:

Contact Type:

\*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.

- 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.

### Case Note Attachment(s)

Listed below are the documents associated with this case note. Click the *View* link below to view that particular item.

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

Click a column title to sort.

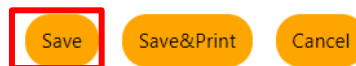
☐ View Thumbnails

[ [Top](#) | [Filter Criteria](#) | [Bottom](#) ]

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.

[ [Top](#) | [Filter Criteria](#) | [Bottom](#) ]

[ [Add a Document](#) | [Scan a Document](#) ]



- 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.




- 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.

Agency Defined Programs

Apps: 1

[Create Agency Defined Program Application](#)

Regional LA:RISE #20565846 - Complete

LWDB:	13 - Los Angeles County WDACS	Application Date	02/23/2021
Onestop:	2986 - LAO-WDACS Partners Office	Exit Date:	N/A
Open/Total Activities:	1 / 2		

Location and Staff

LWDB: 13 - Los Angeles County WDACS  
Create Staff: N/A  
Case Manager: [Antoinette Cole \(31966306\)](#)

Onestop: 2986 - LAO-WDACS Partners Office  
Edit Staff: N/A  
Temporary Case Manager: N/A

Activities / Enrollments / Services

2

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

Activities / Enrollments / Services	0
Partner Programs	0
Credentials	0
Exit / Outcome	N/A

[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**.

#### Login Information

User ID: 29843649

Participant Name: Sara, Cherylynn

Eligible Date: 11/09/2020

Program:

\* Date of Exit:  [Today](#)

Local Workforce Investment Area: Los Angeles County WDACS

\* One Stop Location:

#### Exit Information

\* Exit Reason:

[Exit Wizard](#)

Next >>

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..

**Staff Information**

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Staff ID: 34833527

\* Position:

**Current Case Manager:**

Group: LAO Chrysalis SE  
Case Manager: Cole, Antoinette  
Temporary Case Manager: Not Applicable

[Assign Case Manager](#)  
[Assign Me](#)  
[Remove Case Manager Assignment](#)

**Comments:**

**Case Notes:**

[Add a new Case Note](#) [Show Filter Criteria](#)

ID	Create Date	Subject	Action
No data found.			

**Finish**

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