WORKFORCE DEVELOPMENT
AGING & COMMUNITY SERVICES

CalJOBS Help Sheet

Using the Generic Module in CalJOBS for the Alternative Staffing Organization Program

Prepared by: Research and Statistics Division

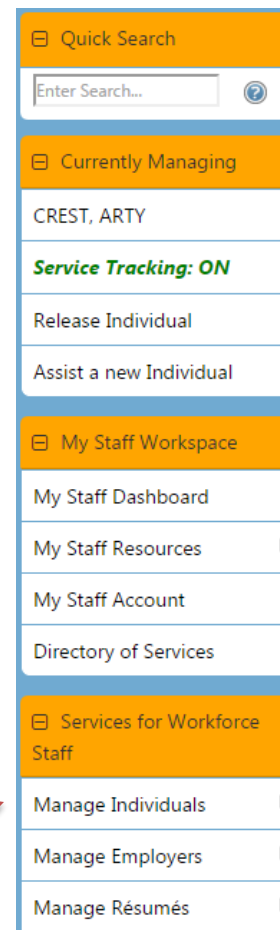# How to use the Generic Module for the Alternative Staffing Organization Program

This help sheet describes how to create a new Alternative Staffing Organization (ASO) Program Application in CalJOBS, add case notes and activities, and how to close the application. The ASO application is accessed through a participant's Generic Module section.

Please note that a participant must first be registered in CalJOBS, before an ASO 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 an ASO Application in CalJOBS

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

Quick Search
Enter Search...

Currently Managing
CREST, ARTY
Service Tracking: ON
Release Individual
Assist a new Individual

My Staff Workspace
My Staff Dashboard
My Staff Resources
My Staff Account
Directory of Services

| Services for Workforce Staff |
| --- |
| Manage Individuals |
| Manage Employers |
| Manage Résumés |

2. Once you click on the participant's name, the system will show a series of folders containing links within 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 ASO application, navigate towards **Staff Profiles > Case Management Profile > Programs.**

Expanded view of the system folders
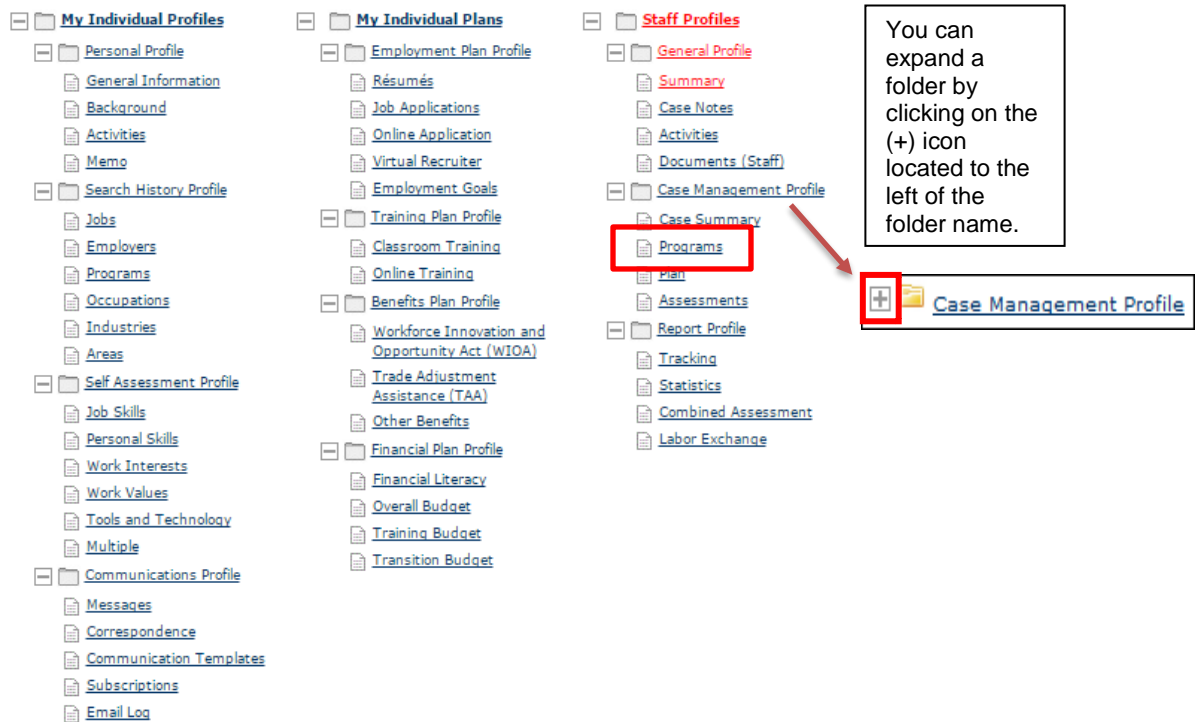
3. Once you've accessed the individual's **Programs** tab, it will display as one of four tabs, all under **Case Management Profile**.
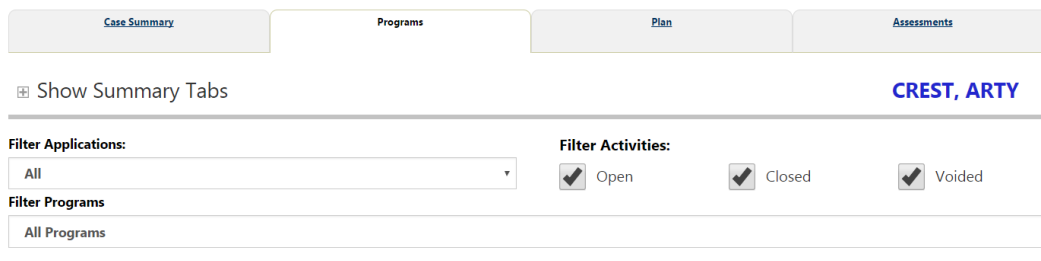
4. Next, scroll down to the **Generic Program** section and click on the **Create Generic Application** link.

Generic Program

Create Generic Application

5. The Generic 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 LWDA/Region and Office Location are correct in the **General Information** section.

General Information

☐ Close Application, never Enrolled

Participant Name: Sara, Cherylynn

* **Application Date:** 03/19/2019 (mm/dd/yyyy) 🔲 Today

* **Date of Eligibility:** 03/19/2019 (mm/dd/yyyy) 🔲 Today

LWIA/Region: Los Angeles County WDACS

* **Office Location:** LAO WDACS ▼

Attended a Rapid Response group orientation? ○ Yes ○ No

Event Search: Click Here

Rapid Response Event Number:

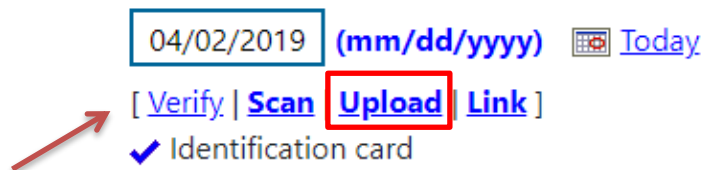* **Meets Program Eligibility:** AAW -Homeless Initiative (HI) Alternative Staffing Org. ▼

Exit Wizard

Next >>

6. For the **Meets Program Eligibility** field, select **AAW – Homeless Initiative (HI) Alternative Staffing Org.**

7. Click the yellow **Next** button at the bottom to continue.

8. In the **Contact Information** 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 yellow **Next** button at the bottom to continue to the next tab.

10. The **Application Questions** tab contains the bulk of the ASO 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 require a verification document will have links that will allow you to upload a verification document. *Select a verification item first by clicking the Verify link.*

    b. 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 ASO program guidance for further information regarding how and when certain questions are to be completed or updated.*

    c. 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 the **Staff Attestation** box 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. Add a case note by clicking the **Add a new Case Note** link. Further instructions regarding case notes can be found in the next section of this Help Sheet.

14. When ready, click **Finish** to save the data you have entered. The ASO application has been created!

   You will be taken back to the participant's **Program** tab. Scroll down to the **Generic Program** section to confirm that your newly created ASO application is visible with the status of **Complete**:

Generic Program

Apps: 3

Create Generic Application

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

Homeless Initiative (HI) Alternative Staffing Org. #18819219 - Complete

LWDB:	**13 - Los Angeles County WDACS**	Application Date	**03/19/2019**
Onestop:	**2553 - LAO WDACS**	Exit Date:	**N/A**
Open/Total Activities:	**0 / 0**		

15. When you need to update any of the questions within the application, you may access and edit the participant's application by clicking the **Application Wizard** (the pencil icon).

How to Add Activities within the Generic Module application

Once you have created an ASO application in the generic module, you can record activities or services provided for the participant.

How to Add an Activity:

1. Once in the participant's ASO 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 **AAW – Homeless Initiative (HI) Alternative Staffing Org.** and that the Office Location is correct.

General Information	Service Provider	Enrollment Cost	Financial Aid

General Information

Participant User Name:	CHERYLYNNSARA
Participant State ID:	1000767131
Last Name, First Name MI:	Sara, Cherylynn S
Social Security Number:	3325
Address:	2139 Rome Drive Los Angeles, CA 90065
Application Summary:	**Program:** Homeless Initiative (HI) Alternative Staffing Org. **Application Date:** 03/19/2019 **Eligibility Date:** 03/19/2019
* Customer Program Group:	AAWA - Homeless Initiative (HI) Alternative Staffing Org. ▼
* LWDB:	Los Angeles County WDACS LWDB cannot be modified if staff has local region assignment.
* Office Location:	LAO Goodwill SE ▼
Agency Code Search:	Click Here
Agency Code:	100 - LAO COMMUNITY AND S

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

    a. Click on the **Select Activity Code** link to select the activity code.

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

Enrollment Information

* Activity Code: | 101 | Orientation
[Select Activity Code]

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

Projected Begin Date: 05/24/2018   Today

Actual Begin Date: 05/24/2018   Today

* Projected End Date: 05/24/2018   Today

Select an Item - Mozilla Firefox

https://stagingsc2.geosolinc.com/150/vos06000000/vosnet/Programs/Enrollment/enrollfieldselect.as|

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	Provider Type
101	Orientation	PS - Office Services
102	Initial Assessment	PS - Office Services
103	Provision of Information on Training Providers/Performance Outcomes	PS - Office Services
105	Job Finding Club	PS - Office Services
107	Provision of Labor Market Research	PS - Office Services
110	Attended Rapid Response	PS - Office Services
106	Follow-up Services after Employment (prior to Exit)	PS - Office Services
108	Referred to WIOA Services (not training)	PS - Office Services
109	Referred to Community Resource	PS - Other
112	Job Fair	PS - Office Services
115	Resume Preparation Assistance	PS - Office Services
117	UI General Information	PS - Office Services
118	UI Claims Assistance	PS - Office Services

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.

5. Scroll down to enter the staff information. If not already assigned, select "Assign Me" to assign yourself as the case manager for the individual.

6. 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:	30848549
* Position:	Staff
Current Case Manager:	Case currently Not Assigned to a Case Manager **Assign Case Manager** **Assign Me** **Remove Case Manager Assignment**
Previous Case Manager:	
Comments:	

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

ID	Create Date	Subject	Action
No data found.			

7. Click the yellow **Next** button at the bottom and the activity will be created.

8. Once the activity has been created, you can click the **Exit Wizard** link to return to the **Activity/Service/Enrollment** section of the generic module and you should see your newly created activity listed:

Activities / Enrollments / Services

Create Activity / Enrollment / Service

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

Indicates the number of activities under this application. → 1

Search:

Status	Activity / Provider	WZ	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	101 - Orientation No Provider Information	W	Regional LA: Rise	05/24/2018	05/24/2018	05/24/2018	Close

Page 1 of 1   Rows: 10

The green O indicates an Open status.

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

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Closing an Activity

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

1. Locate the participant's record, expand the **Generic Module** 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 yellow **Finish** button to finish closing this activity.

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 generic application, activities or closures.

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

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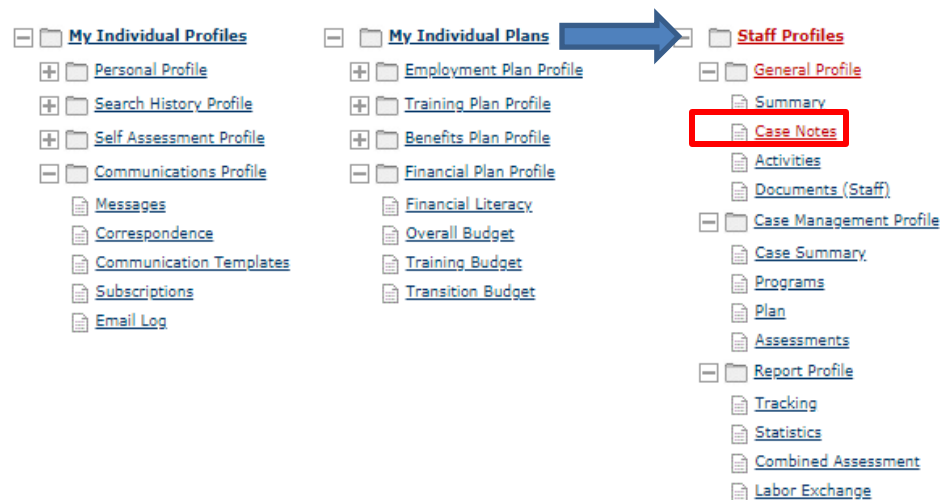
3. You will see any previously created case notes for the participant listed. Click the yellow **Add New Case Note** button towards the bottom of the page to begin creating your case note.

Creating the Case Note

1. Enter the **Contact Date**.

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

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. Underneath the field in which you enter your case note, you have the option of attaching a supporting document. Click **Add a Document** to upload a document. *If these functions are unavailable, please keep a physical copy with the hard file.*

7. When you are ready, click the yellow **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 an ASO application

At a point designated by the program design, a **Closure** must be created for the ASO 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 **Generic Program** section, under the participant's **Program Tab.** Click on the plus (+) sign, just left of the sunburst icon, in order to expand all the sections of the generic module.

Generic Program			Apps: 3
Create Generic Application			

Homeless Initiative (HI) Alternative Staffing Org. #18819219 - Complete

LWDB:	13 - Los Angeles County WDACS	Application Date	03/19/2019
Onestop:	2553 - LAO WDACS	Exit Date:	N/A
Open/Total Activities:	0 / 0		

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, S
Eligible Date:	10/31/2017
Program:	ESP -(SEL) Back On Track
* Date of Exit:	[ ] 🗓 Today
Local Workforce Investment Area:	Los Angeles County WDACS
* One Stop Location:	None Selected ▼

Exit Information

* Exit Reason:	None Selected ▼

Exit Wizard

Next >>

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

5. Skip the **Employment Information** tab by clicking the yellow **Next** button to proceed. (Employment Information will be recorded within the **Application Questions** in the ASO 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.

Outcome Staff Information

Case Note: [Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
19150272	05/10/2018	Deleted Exit	Edit	

Page 1 of 1 Rows: 5 ▼

Current Case Manager: Case currently Not Assigned to a Case Manager
Assign Case Manager
Assign Me
Remove Case Manager Assignment

Previous Case Manager:

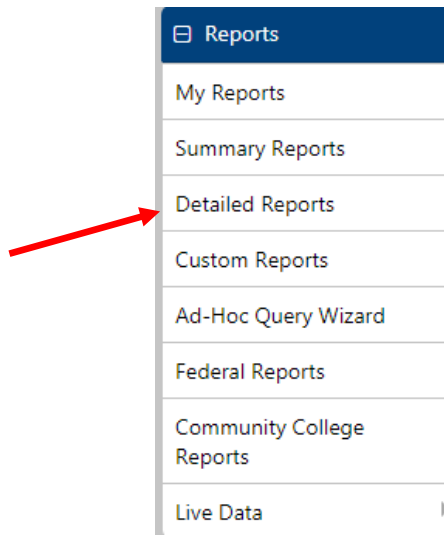7. Confirm or assign the **Current Case Manager**, then click the yellow **Finish** button to complete the **Exit/Outcome.** The application is now closed.

Exit Wizard

<< Back   Finish

Generic Module Reporting

How to Run ASO Generic Module Reports

1. Login to CalJOBs.
2. Select "Detailed Reports" from the "Reports" section in the left side navigation menu.

⊟ Reports

My Reports

Summary Reports

Detailed Reports

Custom Reports

Ad-Hoc Query Wizard

Federal Reports

Community College Reports

Live Data ▶

3. Select "Questionnaire" under the "Miscellaneous Report" section.

Miscellaneous Reports

Administration
Display Administration Report

Contact
Display Contact Reports

Messages
Display Messages Reports

Security
Display Security Reports

Tracking
Display Tracking Reports

Assessment Results
Display Assessment Results Report

Equal Employment Opportunity
Display Equal Employment Opportunity Reports

Questionnaire
Display Questionnaire Reports

Survey
Display Survey Reports

4. From the Questionnaire page, select "Generic Programs" or "Questionnaire List Report."

Questionnaire:

Advanced

- Generic Programs
- Questionnaire List Report

- Employer

- The **Generic Programs** report provides summary level counts of the data entered in the application. You can CTRL click to select more than one field to display the summary level count.
- The **Questionnaire List** Report displays records showing responses to **all** the customized questions in the Generic Application, including a few application identifiers like Participant Name and App ID.

5. After selecting the report, you will be brought to the "Selection Criteria" page. Select the Homeless Initiative (HI) Alternative Staffing Org. application in the program field, then enter the rest of the desired criteria and click the "Run Report" button at the bottom of the page.

Filter By Date:	Eligibility Date ▾
Date Range:	Previous Program Year ▾
From:	07/01/2016 📅 (mm/dd/yyyy)
To:	06/30/2017 📅 (mm/dd/yyyy)

Reset Dates

The date range selection of "Today" will retrieve real time data.
Otherwise, data may be up to 24 hours behind.

Run Report

6. Once the report runs, data can be exported by clicking the floppy disk icon in the top left corner of the report and choosing the report export format.

◀◀ ◀ 1 of 2 ? ▶ ▶▶ ⟳ 💾 ▾

XML file with report data t Report
CSV (comma delimited) RISE 2.0
PDF os Angeles
  RISE 2.0
Excel ility Date
  - StartDate: 07/01/2016
  - EndDate: 06/30/2017