

CalJOBSSM “Plan” Section — Data Entry Guide

This guide is intended to assist with the completion of the Objective Assessment Summary (OAS) and Individual Employment Plan (IEP) under the “Plan” section of CalJOBSSM.

- **Step 1 — Activity Code 205 — The Development of IEP/ISS/EDP**

The first step of this process is to enter **Activity Code 205** in CalJOBSSM. The Projected Begin Date, Actual Begin Date, Projected End Date, and Actual End Date columns will all display the same date.

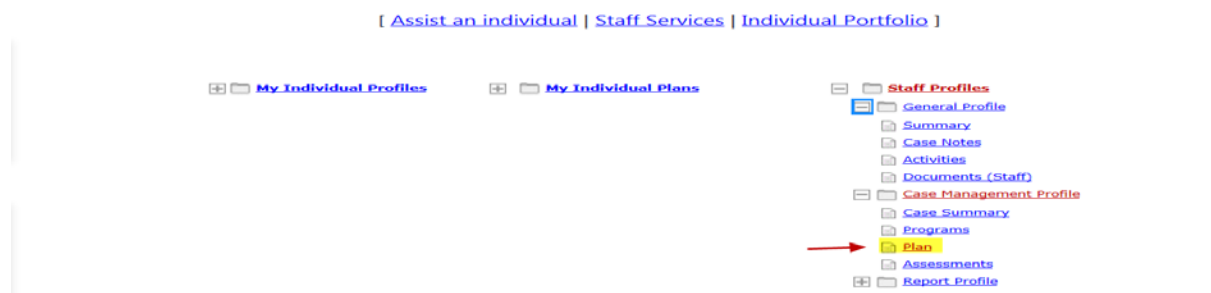
| Status | Activity / Provider | Actions | Funding / Grant | Projected Begin Date | Actual Begin Date | Projected End Date | Actual End Date |
|----------|---|----------|-----------------|----------------------|-------------------|--------------------|-------------------------------------|
| C | 205 - Development of IEP/ISS/EDP No Provider Information | W | Adult | 06/05/2019 | 06/05/2019 | 06/05/2019 | 06/05/2019 Successful Completion |

Entering the 205 activity code means that Staff and the participant will jointly develop an ongoing strategy to identify the participant’s employment goals, achievement objectives, and appropriate combination of services for the participant to be able to achieve his/her employment goals—including providing information on eligible providers of training services and career pathways to attain career objectives.

- **Step 2 — Plan Tab**

After Activity Code 205 has been entered, under the “Case Management Profile,” select the “Plan” tab. This will allow staff to create and manage the customer’s career goals and skills assessments as part of providing an Objective Assessment Summary and an Individual Employment Plan. This information provides a comprehensive plan (i.e., a needs analysis) that helps to direct the nature and number of program services provided to the individual.

CaIJOBS™ Use this folder to manage Plan information for the selected Individual.

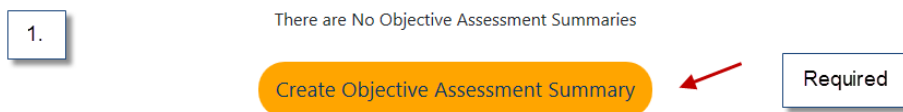


- **Step 3 — Creating an OAS**

Select the “**Create Objective Assessment Summary**” from the options on the Plan tab (shown below). The Objective Assessment Summary (OAS) allows staff members to record and analyze an overview of the individuals’ academic levels, skill levels, and service needs.



Objective Assessment Summary



Selecting the Create Objective Assessment Summary button will display the first “General” screen along with 11 other categories that must be completed (shown below):

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[General] [Expectation] [Education] [Degree] [Certificate] [Employment] [Household & Income] [Work Readiness] [Barriers] [Criminal Background]
[Tests] [Referrals]

- **Step 4 — Creating an Individual Employment Plan/Service Strategy**

Once the Objective Assessment Summary and all 11 subsections have been completed, staff will then select the “**Create Individual Employment Plan/Service Strategy.**”

Individual Employment Plan/Service Strategy

2

There are no Individual Employment Plans/Service Strategies

Required

Create Individual Employment Plan/Service Strategy

Return to the Directory of Services

Selecting the **Create Individual Employment Plan/Service Strategy** option will display four subcategories: Plan, Goals, Objectives, and Services. Complete all four sections and select “**Finish.**”

CaIJOBSSM Step 1 of 4.
Enter your information below. When you are finished click the *Next*>> button.

Plan Goals Objectives Services

- **Step 5 — Printing**

Once both sections have been entirely filled out, there will be an option to **Display/Print** the Individual Employment Plan/Service Strategy. Select the “**Display/Print**” option as highlighted below:

| | | | |
|------------------------------|--------------------------|-------------|-----------------------------|
| Case Summary | Programs | Plan | Assessments |
|------------------------------|--------------------------|-------------|-----------------------------|

Objective Assessment Summary

| # | LWIA/Region | Office Location | Program | Staff | Date | Action |
|------|---------------------|---|--|--------------|------------|---|
| 2689 | City of Los Angeles | 00312 Hollywood North Worksource Center--JS | Title I - Workforce Development (WIOA) | Staff11, Lai | 06/04/2019 | Edit Delete Print |

Create Objective Assessment Summary

Individual Employment Plan/Service Strategy

| # | LWIA/Region | Office Location | Status | # of Goals | Staff | Date | Action |
|------|---------------------|--|--------|------------|--------------|------------|---|
| 4224 | City of Los Angeles | 00308 Wilshire Metro Worksource Center | OPEN | 1 | Staff11, Lai | 06/04/2019 | Edit Delete Display/Print |

Create Individual Employment Plan/Service Strategy

Print Required

Once **Display/Print** is selected, you will be redirected to a page allowing you to review the Individual Employment Plan. Scroll down to the “Plan Information” section and select the option that says “**When printing plan do you want print services?**”

Plan Information

Plan Start Date 06/04/2019

LWDB/Region City of Los Angeles

Plan started in office location 00308 Wilshire Metro Worksource Center

Plan closed on

When printing plan do you want to print services?

Select

In the “Individual Signature” section, select the option to “Include Staff Signature.”
Then, select “Print.”

Individual Signature

Create PDF

Include Staff Signature



[Applicant Signature](#)

Return

Print



WorkSource Centers are only required to print the Individual Employment Plan/Service Strategy portion of the Plan. The printed IEP page with signatures and services (activity codes) **must** be included in participant files. The printed IEP page must be signed and dated by the applicant and the WorkSource Center staff member. “Activity Code: 205-Development of IEP/ISS/EDP” must appear on the printed page (shown below).

General Information:

Plan ID: 4224
 User ID: 36213
 Name: Mike, Mike
 Plan was started on: 06/04/2019
 Plan was started in office location: 00308 Wilshire Metro Worksource Center
 Plan closed on:

Goals and Objectives Established:

| Goal # /Goal ID | Program Affiliation (s) | Type of Goal | Term of Goal | Date Established | Estimated Date of Completion | Actual Completion Date | Status |
|------------------------------|-------------------------|--------------|--------------|------------------|------------------------------|------------------------|--------|
| 1/4518 | WIOA | Employment | Short Term | 06/04/2019 | 08/20/2019 | | Open |
| Goal Description: employment | | | | | | | |
| Comments: | | | | | | | |
| Objectives to Goal #1 | | | | | | | |
| Objective | Date Established | Review Date | Program | Staff | Status | | |
| employment | 06/04/2019 | 07/19/2019 | WIOA | Staff11, Lai | Open | | |
| Comments: | | | | | | | |

Services Provided Against Plan:

| Service/Activity | App# - Program | Begin Date | End Date | Provider | Staff |
|--------------------------------|----------------|------------|------------|---------------------|--------------|
| 203-Objective Assessment | 2242702-WIOA | 06/04/2019 | 06/04/2019 | Employment Services | Staff11, Lai |
| 205-Development of IEP/ISS/EDP | 2242702-WIOA | 06/04/2019 | 06/04/2019 | Employment Services | Staff11, Lai |

Signatures

Required

Applicant Signature _____ Date _____ Parent/Guardian Signature _____ Date _____

Staff Signature _____ Date _____