
CalJOBSSM Eligibility Explorer

USER GUIDE

Employment Development Department

Workforce Services Branch

2021

Eligibility Explorer Description I

Individual: Creating an Eligibility Explorer Application II

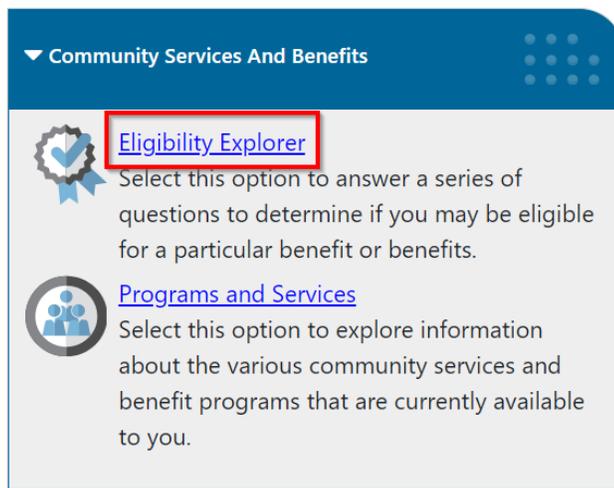
Staff: Viewing / Converting an Eligibility Explorer Application via the
Navigation Menu III

Staff: Viewing / Converting an Eligibility Explorer Application via the
Programs Tab IV

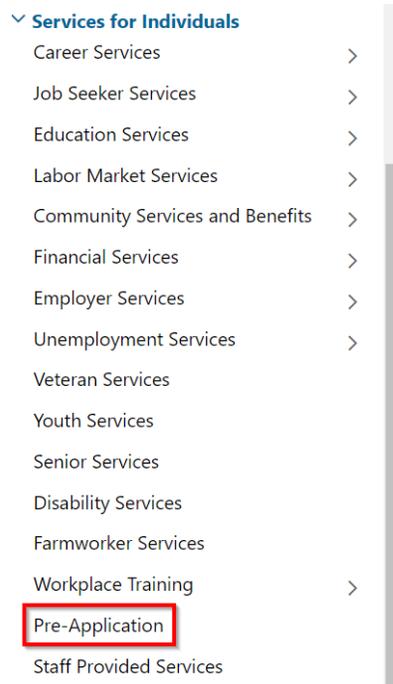
I. Eligibility Explorer Description

Job seekers who may be eligible for federal program services (Wagner-Peyser, Workforce Innovation and Opportunity Act (WIOA), etc.) can start a “self-service” Eligibility Explorer application in the CalJOBS system after registration, and check their eligibility at any time. The Eligibility Explorer application wizard that is launched helps individuals determine if they are qualified for services under various federal programs and provides the ability to provide information and verification documents before contacting AJCC staff for case management assistance. This will improve efficiency of in person services, as well as virtual services and saves time for both the job seeker and one-stop staff.

II. Individual: Creating an Eligibility Explorer Application



Click on the “**Eligibility Explorer**” link within the “Community Services And Benefits” widget on your dashboard.



The Eligibility Explorer option can also be accessed via the left navigation menu by selecting the “**Pre-Application**” option under “Services for Individuals”.

Eligibility Explorer

Introduction

The Workforce Investment and Opportunity Act (WIOA) is designed to provide assistance through many partner agencies offering services to help find employment and may include training opportunities. These services are provided at no cost and are designed to help you in gaining employment. The programs may be able to offer training or can provide job search assistance. The programs are administered through the America's Job Centers. By completing this pre-application, appropriate referrals to programs you may qualify for can be provided and information on how to access these services.

Using the information you provided during registration, in combination with the input you provide during the next few steps, we will determine whether you may be eligible for any available programs. Please be aware that this does NOT guarantee eligibility, but it will indeed put you on the right track to meeting with staff and determining what assistance is available. So let us get started.

Currently Enrolled

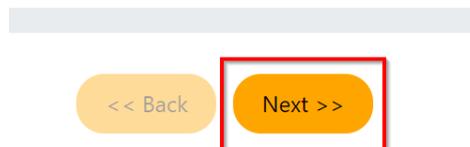
Available Programs

<p>Wagner-Peyser</p> <p>The Wagner-Peyser Act of 1933 is a U.S. federal law that established nationwide system of public employment offices known as the U.S. Employment Service. This system has provided high quality job seeker and employer labor exchange service and information for over seventy years. The Act was amended by the Workforce Investment Act of 1998. The amendment made the Employment Service part of the One-Stop services delivery system.</p> <p>The One Stop delivery system provides universal access to an integrated array of labor exchange services so that workers, job seekers and businesses can find the services they need in one stop and often under one roof.</p> <p><input checked="" type="checkbox"/> Interested</p>	<p>Jobs for Veterans (WP)</p> <p>Veterans often have a difficult time converting their military training and experience into civilian training and jobs. As a result, they often can't find jobs for which they are qualified, and when they pursue educational opportunities, they have to repeat classes that are equivalent to their military training. The Jobs for Veteran Services program may be able to assist veterans earn civilian credentials using vocational and technical skills they learned while in the military.</p> <p><input type="checkbox"/> Interested</p>	<p>Migrant Seasonal Farmworker (WP)</p> <p>All One-Stop Centers must provide the same quality of services to migrant and seasonal farmworkers as are provided to non-farmworkers. The United States Department of Labor, Employment and Training Administration established equity and minimum service level standards for migrant and seasonal farmworkers, which must be met by all states.</p> <p><input type="checkbox"/> Interested</p>	<p>Adult Services (WIOA)</p> <p>The WIOA Adult program improves the quality of the adult workforce, reduces welfare dependency, and enhances the productivity and competitiveness of the nation's workforce. The program provides adults with workforce preparation, career services, training services and job placement assistance needed to increase occupational skill attainment, obtain industry recognized credentials, and secure a good job that provides earnings that lead to self-sufficiency.</p> <p><input checked="" type="checkbox"/> Interested</p>
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Review the information under "Eligibility Explorer" on the intro page.

On the same screen, you will also see a "Currently Enrolled" section and an "Available Programs" section with program cards.

Review the information under each program card and **check the "Interested" checkbox** under each program that you would like to apply for.



Click "**Next**" at the bottom of the page to start the Eligibility Explorer Application.

Eligibility Explorer

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Progress bar showing steps: Intro (checked), Contact (active), Demographic (locked).

- Intro**
 - Education
 - Public Assistance
 - Veteran
- Contact**
 - Farmworker
 - Factors
 - Documents
- Demographic**
 - Demographic
 - Employment
 - Household And Income
 - Eligibility Review

[Hide All Steps](#)

Complete each section by **verifying** that the pre-populated information from your CalJOBS registration is correct. Also, make sure to **enter information into the required fields**.

Once you are done completing a section, click “**Next**” to move onto the next section of the Eligibility Explorer application.

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Veteran **Documents** **Eligibility Review**

- ✓ Intro
- ✓ Education
- ✓ Public Assistance
- ☑ **Documents**
- ✓ Contact
- ✓ Farmworker
- ✓ Factors
- ☐ Eligibility Review
- ✓ Demographic
- ✓ Employment
- ✓ Veteran

Documents Section

The 2nd to last section of the Eligibility Explorer is the Documents section. In this section you can **upload documentation required for eligibility**. If you are unable to upload your documents, you may skip this step and bring them when you meet with staff.

Documents

You are missing documentation required for eligibility. Please upload the necessary files listed. If you are unable to upload your documents, you may skip this step and bring them when you meet with staff.

Documentation Required	Uploaded?	Action
Social Security Documentation	✗	Upload
Address Documentation	✗	Upload
Citizenship Documentation	✗	Upload
Education Level Documentation	✗	Upload
Education Status Documentation	✗	Upload

Documents Section (cont.)

Click on the documentation name (Social Security Documentation, Address Documentation, etc.) in the Documentation Required column **or click on the Upload link** next to the documentation type that you would like to upload.

Social Security Documentation

Please select the type of document you are uploading. Then click the "Browse" or "Choose File" button to select a file for upload:

- DD-214 Report of Transfer of discharge
- Employment Records
- IRS Form Letter 1722
- Letter from Social Service Agency
- Unemployment Wages Records
- Social Security Benefits
- Social Security Card
- W-2 Form
- Letter/Printout from Social Security Office
- Public Assistance Record/Printout
- Agency Award Letter
- Unemployment Wage Records

File Name	Upload Date	Action
No Files Uploaded		
<input type="text"/>	<input type="button" value="Select File"/>	<input type="button" value="Upload File"/>

Select the type of document you are uploading. Then click the "Select File" button to select a file for upload. Finally, click the "Upload File" button to upload the file.



Click "Close" to close the pop-up window.

Documents

You are missing documentation required for eligibility. Please upload the necessary files listed. If you are unable to upload your documents, you may skip this step and bring them when you meet with staff.

Documentation Required	Uploaded?	Action
Social Security Documentation	✔	Upload
Address Documentation	✘	Upload
Citizenship Documentation	✘	Upload
Education Level Documentation	✘	Upload

You will now see a **green check mark** in the Uploaded column letting you know that the required documentation has been uploaded.

	<p>When you are done uploading the required documentation, click “Next” to move onto the final section (Eligibility Review) of the Eligibility Explorer application.</p>
	<p><u>Eligibility Review Section</u></p> <p>The last section of the Eligibility Explorer application is the Eligibility Review section.</p>
<p><u>Eligibility Review/Determination</u></p> <p>Thank you for filling out the Eligibility Explorer. Based upon the information provided, we have found that you may be eligible for the following services:</p> <ul style="list-style-type: none"> • Wagner-Peyser Services • Adult Services (WIOA Title I) • Unemployment Insurance 	<p><u>Eligibility Review Section (cont.)</u></p> <p>In this section, you can see what services you may be eligible for under “Eligibility Review/Determination”.</p>
<p><u>What's Next</u></p> <p>Our staff will contact you regarding your eligibility. To continue with your eligibility please review the document list as the documents will be required to complete your eligibility. During the eligibility interview, additional questions will be asked.</p> <p>View Summary Report View Document List</p>	<p><u>Eligibility Review Section (cont.)</u></p> <p>You can also view and/or print a summary of your application by clicking on “View Summary Report” or view/print a list of documents that you have uploaded by clicking on “View Documents List”.</p>

Here is a list of contact information for the closest office locations in your area:

SAC MST Downtown 1900 K Street Sacramento, CA 95811 Phone: 916-448-2321 Email: Map Address	JUM - Juma Ventures 815 S street Sacramento, CA 95811 Phone: Email: Map Address	YOL Yolo County Children's Alliance 600 A Street, Suite Y Davis, CA 95616 Phone: 530-757-5558 Email: Map Address
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Programs offered:

- Title I - Workforce Development (WIOA)

Eligibility Review Section (cont.)

At the bottom of this section there is a list of the closest offices and the programs that they offer.

<< Back

Finish

Eligibility Review Section (cont.)

The final step is to submit the Eligibility Explorer application by clicking on **“Finish”**.

III. Staff: Viewing / Converting an Eligibility Explorer Application via the Navigation Menu

Manage Individuals
←

- Create an Individual
- Common Intake
- One Case Note to Multiple Individuals
- Assist an Individual
- Eligibility Explorer Applications

Go to **Manage Individuals** under “Services for Workforce Staff” from the navigation menu on the left side, and click **Eligibility Explorer Applications**.

Search

Created:

LWDB/Region:

Office Location:

Filter

User Name	Last Updated	# of Files	Action
Brenden, Rebecca Brenden	1/12/2021 2:24:06 PM	1	Convert Summary Delete

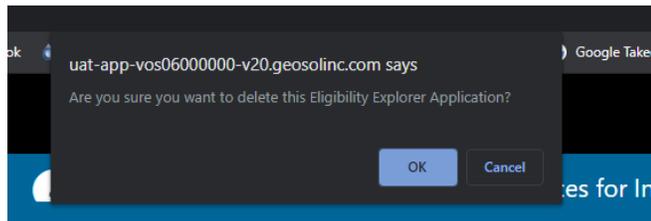
(Optional) Select the appropriate search criteria and click **Filter**.

Eligibility Explorer Summary

SSN: XXX-XX-7364	Created: 11/12/2020	Edited: 11/12/2020
First Name: ██████████	Date of Birth: 7/14/1995	
Last Name: ██████████	Age: 25	
Residential Address:		Mailing Address:
71 Palomar Ave San Luis Obispo, CA 93405 US		71 PALOMAR AVE San Luis Obispo, CA 93405-1740 US
Phone: (555) 555-5555 (Cell/Mobile Phone)		
Alt Phone:		
Email Address: ██████████		

Selective Service:	Yes
Citizenship:	Citizen of U.S. or U.S. Territory
Alien Registration #:	
Alien Expiration Date:	
Education Status:	No, Not Attending Any School
Education Level:	10 Elementary/Secondary school grades completed
Disability:	Yes
Disability Class:	N/A
Veteran Status:	No
Employment Status:	Not Working

(Optional) You can see a summary of the individual's Eligibility Explorer application by clicking **Summary** or delete the Eligibility Explorer application by clicking on **Delete**.



Filter

Search

Created:

LWDB/Region:

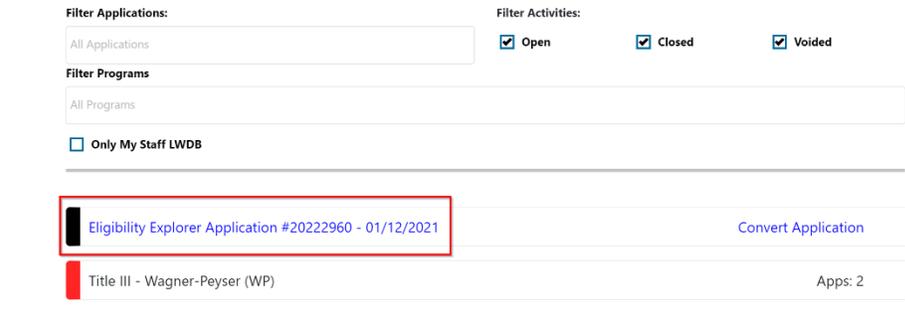
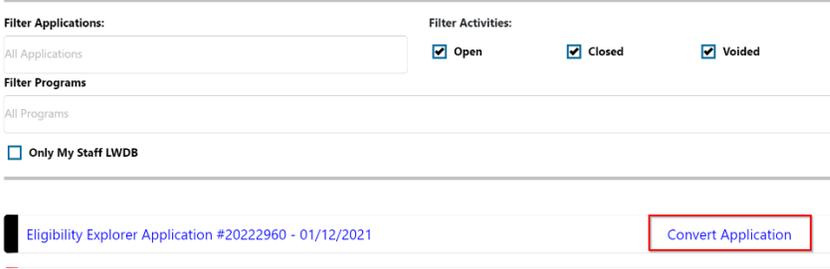
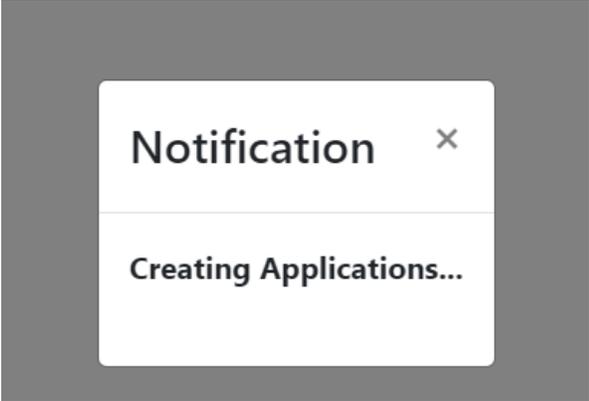
Office Location:

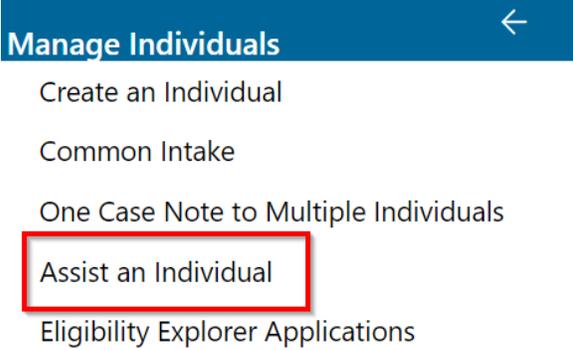
Filter

User Name	Last Updated	# of Files	Action
[User Name]	1/12/2021 2:24:06 PM	1	Convert Summary Delete

From the display of pre-applications, click **Convert** under "Action" for the associated username that you would like to convert.

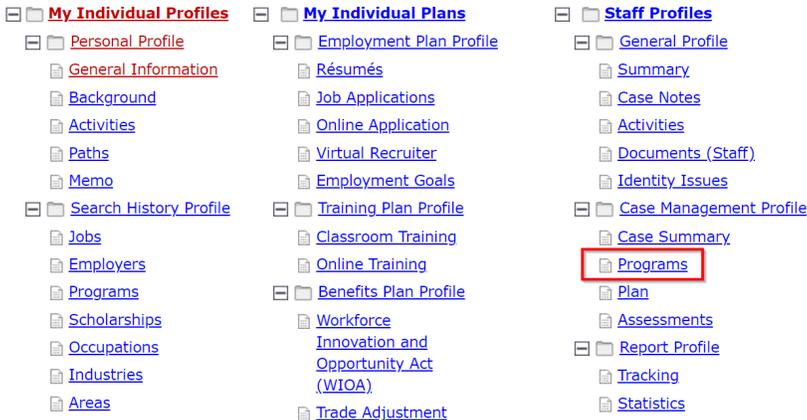
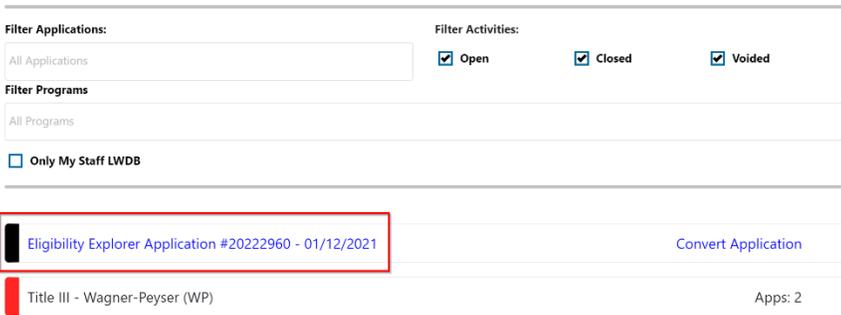
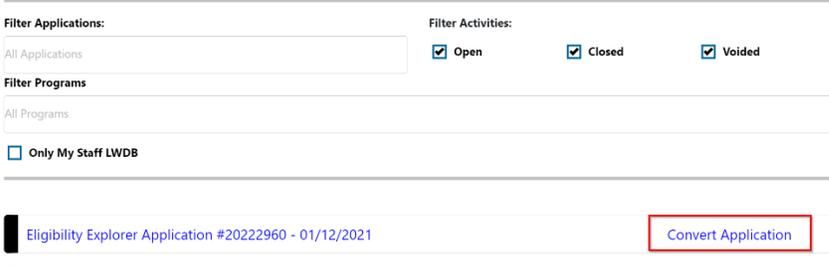
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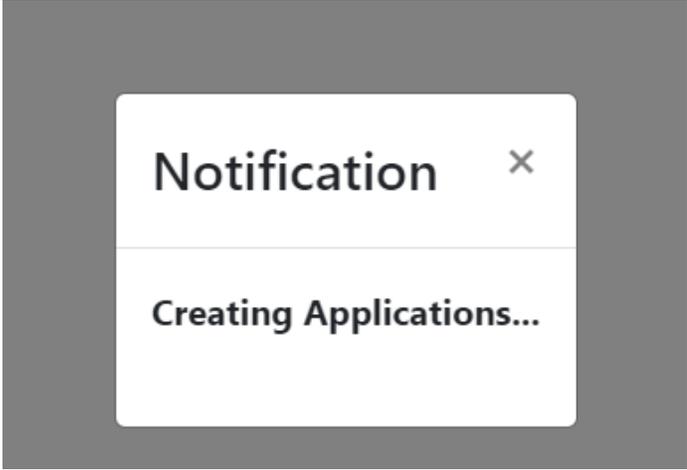
 <p>Filter Applications: All Applications</p> <p>Filter Activities: <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Closed <input checked="" type="checkbox"/> Voided</p> <p>Filter Programs: All Programs</p> <p><input type="checkbox"/> Only My Staff LWDB</p> <p>Eligibility Explorer Application #20222960 - 01/12/2021 Convert Application</p> <p>Title III - Wagner-Peyser (WP) Apps: 2</p>	<p>When you click on “Convert” you will be taken to the individual’s Programs Tab where you will see an Eligibility Explorer Application category at the top of the screen.</p>
 <p>Filter Applications: All Applications</p> <p>Filter Activities: <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Closed <input checked="" type="checkbox"/> Voided</p> <p>Filter Programs: All Programs</p> <p><input type="checkbox"/> Only My Staff LWDB</p> <p>Eligibility Explorer Application #20222960 - 01/12/2021 Convert Application</p>	<p>Click on “Convert Application” to convert the application.</p>
 <p>Eligibility Explorer Application #20222960 - 01/12/2021 Convert Application</p> <p>Check any items below to use the existing Eligibility Explorer Application data to pre-populate and create a program application. The system determines the listing of programs below using the application data, staff access privileges and the existence of any open applications. Once the new applications are created you will be able to access them via the programs tab links below this section.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Wagner-Peyser <input type="checkbox"/> Jobs for Veterans Services (WP JVS) (Not Eligible - No Veteran Status) <input type="checkbox"/> Employment Services for Migrant and Seasonal Farmworkers (WP MSFW) (Not Eligible - No Farmworker Status) <input checked="" type="checkbox"/> Adult Services (WIOA Title I) <input type="checkbox"/> Dislocated Worker Services (WIOA Title I) (Not Eligible - No Layoff) <input type="checkbox"/> Youth Services (WIOA Title I) (Not Eligible - Age Restriction) <input type="checkbox"/> Trade Adjustment Assistance Program (Not Eligible - No Petition) <p>Create Applications</p>	<p>The Eligibility Explorer applications category will expand to show the programs that the individual is eligible for and/or the applications that your staff account has access to. Check the box next to the application(s) that you want to convert and click the “Create Applications” checkbox.</p>
 <p>Notification x</p> <p>Creating Applications...</p>	<p>A pop up will appear that lets you know that the applications are being created</p>

	<p>Scroll down to the respective category (Title I, Title III, National Farmworkers Jobs Program (NFJP), etc.) and you will notice that a full application has been created.</p>
	<p>Click on the respective application to complete the application as you normally would. The created application will be pre-populated with the information that the individual entered in his/her Eligibility Explorer application.</p>
<h2>IV. Staff: Viewing / Converting an Eligibility Explorer Application via the Programs Tab</h2>	
	<p>Go to Manage Individuals under “Services for Workforce Staff” from the navigation menu on the left side, and click Assist an Individual.</p>

<p>General Criteria</p> <p>Individual Username: <input type="text"/></p> <p>Individual User ID: <input type="text"/></p> <p><input type="radio"/> Starts with these #s <input checked="" type="radio"/> Matches exactly</p> <p>State ID Number: <input type="text"/></p> <p>First Name: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p>SSN (last 4 digits): <input type="text"/></p> <p>SSN (full number): <input type="text"/> Example: 999999999</p> <p>State Source ID: <input type="text"/></p> <p>State Activity ID: <input type="text"/></p> <p>Date of Birth: <input type="text"/> (MM/DD/YYYY)</p> <p>Telephone Number: <input type="text"/> - <input type="text"/> - <input type="text"/> <input type="checkbox"/> Include Alternate</p>	<p>Input the appropriate search criteria</p>																		
<p>[Top Search Bottom]</p> <p>Assigned LWIA / One Stop</p> <p>LWIA/Region: <input type="text" value="None Selected"/></p> <p>One Stop Location: <input type="text" value="Select an LWIA/Region"/></p> <p>[More Search Options]</p> <p><input type="button" value="Search"/></p>	<p>Click on the blue Search link or scroll to the bottom and click the orange Search button.</p>																		
<p>Results View: Summary Detailed To sort on any column, click a column title.</p> <table border="1"> <thead> <tr> <th>User name</th> <th>First Name</th> <th>Last Name</th> <th>State ID</th> <th>Last Login Date</th> <th>Last Exit</th> <th>Created</th> <th>Action</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>[User Name]</td> <td>Brenden</td> <td>Watson</td> <td>2534-0000</td> <td>01/12/2021</td> <td></td> <td>06/27/2011</td> <td> Summary Tab Case Notes Tab Activities Tab Programs Tab </td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	User name	First Name	Last Name	State ID	Last Login Date	Last Exit	Created	Action	Select	[User Name]	Brenden	Watson	2534-0000	01/12/2021		06/27/2011	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>	<p>Click on the individual's user name to assist the individual.</p>
User name	First Name	Last Name	State ID	Last Login Date	Last Exit	Created	Action	Select											
[User Name]	Brenden	Watson	2534-0000	01/12/2021		06/27/2011	Summary Tab Case Notes Tab Activities Tab Programs Tab	<input type="checkbox"/>											

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 <p>My Individual Profiles</p> <ul style="list-style-type: none">Personal Profile<ul style="list-style-type: none">General InformationBackgroundActivitiesPathsMemoSearch History Profile<ul style="list-style-type: none">JobsEmployersProgramsScholarshipsOccupationsIndustriesAreas <p>My Individual Plans</p> <ul style="list-style-type: none">Employment Plan Profile<ul style="list-style-type: none">RésumésJob ApplicationsOnline ApplicationVirtual RecruiterEmployment GoalsTraining Plan Profile<ul style="list-style-type: none">Classroom TrainingOnline TrainingBenefits Plan Profile<ul style="list-style-type: none">Workforce Innovation and Opportunity Act (WIOA)Trade Adjustment <p>Staff Profiles</p> <ul style="list-style-type: none">General Profile<ul style="list-style-type: none">SummaryCase NotesActivitiesDocuments (Staff)Identity IssuesCase Management Profile<ul style="list-style-type: none">Case SummaryProgramsPlanAssessmentsReport Profile<ul style="list-style-type: none">TrackingStatistics	<p>Navigate to the individual's Programs Tab by expanding the "Staff Profiles" list at the top of the page and clicking on Programs under "Case Management Profile."</p>
 <p>Filter Applications: All Applications</p> <p>Filter Activities: <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Closed <input checked="" type="checkbox"/> Voided</p> <p>Filter Programs: All Programs</p> <p><input type="checkbox"/> Only My Staff LWDB</p> <hr/> <p>Eligibility Explorer Application #20222960 - 01/12/2021 Convert Application</p> <p>Title III - Wagner-Peyser (WP) Apps: 2</p>	<p>At the top of the page, you will see an Eligibility Explorer Application category.</p>
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<p>WIOA #20222961 - Incomplete ✎ 🖨️ ✓</p> <table border="1"> <tr> <td>+ LWDB:</td> <td>29 - Sacramento Employment and Training Agency</td> <td>Application Date:</td> <td>01/12/2021</td> </tr> <tr> <td>Onestop:</td> <td>1780 - 05900 Sacramento (WSB)</td> <td>Participation Date:</td> <td>N/A</td> </tr> <tr> <td>Open/Total Activities:</td> <td>0 / 0</td> <td>Closure Date:</td> <td>N/A</td> </tr> <tr> <td></td> <td></td> <td>Exit Date:</td> <td>N/A</td> </tr> </table>	+ LWDB:	29 - Sacramento Employment and Training Agency	Application Date:	01/12/2021	Onestop:	1780 - 05900 Sacramento (WSB)	Participation Date:	N/A	Open/Total Activities:	0 / 0	Closure Date:	N/A			Exit Date:	N/A	<p>Scroll down to the respective category (Title I, Title III, National Farmworkers Jobs Program (NFJP), etc.) and you will notice that a full application has been created.</p>
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		Exit Date:	N/A														
<p>Title I - Workforce Development (WIOA) 1 / 11</p> <p>Intro Contact Demographic</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Intro <input checked="" type="checkbox"/> Veteran <input checked="" type="checkbox"/> Public Assistance <input checked="" type="checkbox"/> Miscellaneous <input checked="" type="checkbox"/> Contact <input checked="" type="checkbox"/> Employment <input checked="" type="checkbox"/> Barriers <input checked="" type="checkbox"/> Eligibility Summary <input checked="" type="checkbox"/> Demographic <input checked="" type="checkbox"/> Education <input checked="" type="checkbox"/> Household And Income <p style="text-align: center;">▲ Hide All Steps</p>	<p>Click on the respective application to complete the application as you normally would. The created application will be pre-populated with the information that the individual entered in his/her Eligibility Explorer application.</p>																