



CALJOBS TRAINING



SCANNING DOCUMENTS INTO CALJOBS



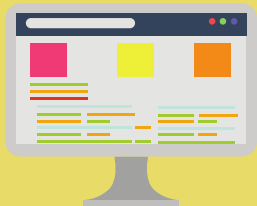
This presentation will explain the process of scanning documents into CalJOBS.



CALJOBS TRAINING



SCANNING DOCUMENTS INTO CALJOBS



Click the Computer Icon
to watch a training video
on this [process](#).



1

Login to CalJOBS and locate a participant's profile. Within the "**Staff Profiles**", under the "**General Profile**" tab select the "**Documents (staff)**" folder. Then select the "**Add a Document**" button to upload a document.




2

You will arrive at the "**Document Association**" and "**Document Information**" tabs. Fill in all the fields displayed on the screen.



3

Upload documents noted in the Customer Tracking and Case Management Activities for WIOA Enrolled Youth- Attachment A in the "**Attach Document**" tab. As you upload documents, they will populate into a table



01

Login to CalJOBS and locate a participant's profile. Within the **"Staff Profiles"**, under the **"General Profile"** tab select the **"Documents (staff)"** folder. Then select the **"Add a Document"** button to upload a document.

Documents Folder

Documents Available

Listed below are the documents available on the selected Individual. Click the View link below to view that particular item. Listed below are the documents available on the selected Individual for linking. If you see a document that matches your specified criteria, choose it from the Select column below and click the Link Document button.

[Show Filter Options \(Results are being filtered\)](#)

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

Click a column title to sort. [Top](#) | [Filter Criteria](#) | [Bottom](#)

Document Name	Document Tags	Category	Modify Date	Expiration Date	Action
social_security_card.docx	Social Security Card	Verification	09/13/2019 11:39		View Review Edit Download Meta.Data Delete

Page 1 of 1 Rows 100

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](#) [Link a Document](#) [Complete Online Form](#)

- [-] Staff Profiles
 - [-] General Profile
 - Summary
 - Case Notes
 - Activities
 - Documents (Staff)**
 - Case Management Profile
 - Case Summary
 - Programs
 - Plan
 - Assessments
 - Report Profile

Select the "Documents (Staff)" Folder

Select the "Add a Document" Folder

02

You will arrive at the "**Document Association**" and "**Document Information**" tabs. Fill in all the fields displayed on the screen.

Document Association

If you would like to categorize the associated document to a specific program, subcategory, application or verification document, please use the controls in this section to do so.

Program:

Application:

Verification Item:

Verification Type:

Document Information

Fill in all the fields

Document Description:

*** Document Tags:** Do not enter Personal Identifiable Information (PII) into this field.
Keywords that will be indexed with this attachment.

User Accessible: Yes No

Date Received:
If left blank, today's date will be used.

Document Expires:

Expiration Date:

03

Upload documents noted in the Customer Tracking and Case Management Activities for WIOA Enrolled Youth-Attachment A in the **"Attach Document"** tab. As you upload documents, they will populate into a table.

Attach Document

Select File

Multiple documents can be uploaded simultaneously, but must be selected one-by-one.

Save

Cancel



Documents Available

Listed below are the documents available on the selected Individual. Click the View link below to view that particular item.

Show Filter Options (Showing all records)

Results View: Summary | Detailed

Click a column title to sort.

[Top | Filter Criteria | Bottom]

As you upload documents, they will populate into a table



Document Name	Document Tags	Category	Modify Date	Expiration Date
CA_Driver.jpg	Anita-Job_Drivers_License	Verification	08/10/2021 10:32	08/06/2026 12:00

Customer Tracking and Case Management Activities for WIOA Enrolled Youth-Attachment A

ATTACHMENT A

Customer Tracking and Case Management Activities for WIOA Enrolled Youth

Supporting and/or Supplemental Documentation	Hard File	Scan into CalJOBS
CalJOBS Registration/Youth Addendum* (signed by parent or legal guardian if under 18)	✓	✓ Youth Addendum Only
CalJOBS WIOA application signed/dated by staff	✓	
Evidence of eligibility including Right-to-Work Documents	✓	✓
<u>Documentation Showing Barriers</u>		
a) School Transcript; In-School Youth (ISY) only	✓	✓
b) Income Verification	✓	
c) Individual Education Plan for youth with a diagnosed disability	✓	✓
d) Selective Service Registration (if required)	✓	✓
e) Youth enrolled by 5% exception, documentation of SETA approval	✓	
f) Follow-up form	✓	
Individual Service Strategy (ISS)	✓	✓
CASAS Assessment result; only if youth is Basic Skills Deficient (BSD)	✓	✓
Documentation of remedial services provided (supporting documentation in CalJOBS required)	✓	
Assessment reports	✓	
Release of confidential information (included in CalJOBS Youth Addendum)	✓	
Grievance procedure (included in CalJOBS Youth Addendum)	✓	
Code of Conduct (included in CalJOBS Youth Addendum)	✓	
Current Work Permit (all work expired work permits)	✓	
Worksite Agreement	✓	
Documentation of all support services provided to youth in program year (receipts* , copies of transportation passes, logs)	✓	✓ Receipts Only

Customer Tracking and Case Management Activities for WIOA Enrolled Youth-Attachment A

<u>Documentation Showing Achievement</u>		
a) High School Diploma	✓	✓
b) GED/HSET Certificate	✓	✓
c) CASAS Post-Test showing increase in Educational Functioning Level (EFL)	✓	✓
d. Employment Verification	✓	✓
e. Occupational Skills Certificate	✓	✓