



## DIRECTIVE

Workforce Investment Board of Tulare County

Date: March 12, 2025

### TUL 25-02 CalJOBS<sup>SM</sup> Activity Codes

#### EXECUTIVE SUMMARY:

This policy provides guidance and establishes the procedures for using CalJOBS activity codes. This policy applies to all staff who input data into CalJOBS for the following programs: Workforce Innovation and Opportunity Act (WIOA) Title I Adult, Dislocated Worker, and Youth, National Dislocated Worker Grant (NDWG), and any other workforce grant utilizing CalJOBS, and is effective immediately.

This Directive contains WIB and State-imposed requirements. ***WIB-imposed requirements are in bold italics.***

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#### REFERENCES:

- WIOA (Public Law [113-128](#)) Sections 129 (b)(2) and 134 (a)(3)(C)(2)
- Training and Employment Guidance Letter (TEGL) [10-16](#), Change 3, Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs (September 15, 2022)
- TEGL [21-16](#), Change 1, Third Workforce Innovation and Opportunity Act (WIOA) Title I Youth Formula Program Guidance (July 30, 2021)
- TEGL [14-18](#), Aligning Performance Accountability Reporting, Definitions, and Policies Across Workforce Employment and Training Programs Administered by the U.S. Department of Labor (DOL) (March 25, 2019)
- TEGL [19-16](#), Guidance on Services provided through the Adult and Dislocated Worker Program under the Workforce Innovation and Opportunity Act (WIOA) and The Wagner-Peyser Act Employment Service (ES), as amended by Title III of WIOA, and for Implementation of the WIOA Final Rules (March 01, 2017)

- Training and Employment Notice (TEN) [19-22](#), Change 1, Reporting Training in the U.S. Department of Labor’s (DOL) Participant Individual Record Layout (PIRL) (February 27, 2023)
- DOL-only Performance Accountability, Information, and Reporting System – Office of Management and Budget Control No. [1205-0521](#), Participant Individual Record Layout (PIRL) (PDF)
- Workforce Services Directive (WSD) [19-05](#), Monthly and Quarterly Financial Reporting Requirements (December 4, 2019)
- WSD [18-02](#), Data Change Request Form Procedure (July 31, 2018)
- WSD [24-05](#), CalJOBS<sup>SM</sup> Activity Codes (October 10, 2024)
- Internal Administrative Notice IAN 19-014, RESEA Technical Assistance Guide (January 27, 2020)
- WIB Directive TUL [24-04](#), Stipends and Incentives Directive (September 11, 2024)
- WIB Directive TUL [22-04](#), Performance Guidance (September 14, 2022)
- WIB Directive TUL [23-04](#), WIB WIOA Eligible Training Provider List Policy and Procedures (November 8, 2023)
- WIB Directive TUL [19-04](#), Pathway to Services, Referral, and Enrollment (August 14, 2019)
- WIB Directive TUL [20-03](#), WIOA Youth Program Requirements (April 8, 2020)
- WIB Directive TUL [17-02](#), WIOA Title I Adult, Dislocated Worker, and Youth Supportive Services Policy (August 9, 2017)
- WIB Directive TUL [19-06](#), WIOA Title I Adult and Dislocated Worker Follow-up Services (November 13, 2019)

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## **BACKGROUND:**

The WIOA provides a workforce system that delivers career and training services throughout California at America’s Job Centers of California<sup>SM</sup> (AJCC). Given the critical importance of the workforce system, its performance at the local, state, and federal levels is crucial. Consistent, accurate performance reporting allows the workforce system to assess its effectiveness, make data-informed improvements, be accountable to taxpayers, and, ultimately, support vibrant communities, businesses, and families throughout the nation. The public workforce development system evaluates performance in the following areas:

- Individual program participants’ employment and earnings.
- Individual program participants’ skill gains and credentials attained.
- Effectiveness in serving employers.

While certain services, such as information on other programs or services, may not trigger inclusion in performance, it is critical that all services are captured and reported to the Department of Labor (DOL). It's important to note that the Wagner-Peyser program provides vital self-service and informational services that result in the program having a high percentage of reportable individuals. Even though these individuals are not included in the performance accountability calculations, the DOL strongly supports these services.

The use of activity codes has a direct relationship to federal reporting and WIOA performance indicators and should be evaluated closely to ensure the service provided aligns with the definition of the activity code selected for entry into CalJOBS. For more information on the performance measures, refer to Performance Guidance (WSD24-07).

While federal requirements may not apply to state-funded initiatives, the definitions for the CalJOBS activity codes provided in this policy must be used.

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## **POLICY AND PROCEDURES:**

To provide consistent and accurate reports, workforce staff are required to capture information on all individuals and employers served, and the services provided to them; this includes individuals served only with self-service activities. ***All WIOA Title I, NDWG, and any other workforce or WIB grant utilizing CalJOBS are required to enter data via the CalJOBS system within a 20-day period from when the activity occurred or the 10<sup>th</sup> day of the following month, whichever occurs first.*** These services are tracked using CalJOBS activity codes and can be applied to an individual or employer account. This policy provides a description of the various service types, how to document a service funded by multiple funding streams, descriptions and guidance for common activity code fields, and the resources available when entering activity codes into CalJOBS.

### **Service Types for Individuals**

The services offered to individuals and employers through the workforce system are grouped into distinct service types or reporting categories. Some service types or reporting categories require verification of authorization to work. Please see [WIB Directive TUL 19-04](#) Pathways to Services, Referral, and Enrollment or the most recent directive for more information on the requirements surrounding authorization to work.

The following outlines the service categories (reporting categories) for individuals.

#### *Basic Career Services*

Basic career services are universally accessible and must be made available to all individuals (excluding Youth participants) seeking employment and training services. Generally, these

services involve less staff time and involvement and can be broken down into two categories: self-service and staff-assisted.

- **Self-Service** – Self-service basic career services, including information-only services or activities, occurs when individuals independently access the workforce development system information and activities with very little to no staff assistance. This can be done in either a physical location, such as an AJCC resource room or partner agency, or remotely via the use of electronic technologies. Self-service activities do not extend the date of exit in performance reporting.

Self-service does not uniformly apply to all virtually accessed services. For example, virtually accessed services that provide a level of support beyond independent job or information seeking on the part of an individual would not qualify as a self-service. Self-Service activity codes provided by Wagner-Peyser or JVSG staff must be recorded in CalJOBS under the Registered Individual customer group in the Title III – Wagner-Peyser application. It is up to each Local Area to determine if self-service activities will be recorded in CalJOBS using the Registered Individual customer group in the Title III – Wagner-Peyser application or the Title I – Workforce Development application.

Individuals with only the Registered Individual eligibility are not in performance, but all individuals and their services are reported to the DOL in the WIOA quarterly and annual federal reports.

- **Staff-Assisted** – Staff-Assisted basic career services are basic career services other than self-service. Staff-Assisted services extend the date of exit in performance reporting.

#### *Individualized Career Services*

Individualized career services must be provided to participants (excluding Youth participants) after staff determine that such services are required to retain or obtain employment. Generally, these services involve significant staff time and customization to each individual's needs.

Individualized career services include services such as: specialized assessments, developing an individual employment plan, counseling, work experiences (including transitional jobs), etc.

Individualized career services extend the date of exit in performance reporting.

#### *Youth Services*

Instead of basic and individualized career services, the Title I Youth program has 14 youth program elements with various corresponding services. This policy refers to these services as youth services or youth training services. Please see the Training Services and Youth Training Services section below for additional information on youth training services and see [WIB](#)

[Directive TUL 20-03](#) WIOA Youth Program Requirements or the most recent directive for more information on the 14 youth program elements.

Youth services are only available for eligible youth between ages 14-24. Both the CalJOBS Objective Assessment (412) and Development of Individual Employment Plan (413) activity codes must be provided to a Youth prior to receiving further youth services. The Objective Assessment (412) and Development of Individual Employment Plan (413) activity codes do not create participation in the program and thus do not trigger the exit clock. For additional information on the definition of a participant for the Youth program, please see [WIB Directive TUL 22-04](#) Performance Guidance or the most recent directive.

There are several unique differences with youth services that should be noted:

- After eligibility determination and the completion of an Objective Assessment (412) and Individual Employment Plan (413), all youth services (except follow-up services) trigger participation and extend the exit clock.
- Case management is the act of connecting youth to appropriate services and not a program element. Case managers providing case management should not be reported as one of the 14 youth program elements.
- On-the-job training is considered a work experience (not training).
- Entrepreneurial training is not considered a training service.

#### Training Services and Youth Training Services

Training services can be critical to the employment success of many participants. Training services include the following:

- On-the-Job Training (does not include Youth)
- Skill Upgrading
- Entrepreneurial Training (does not include Youth)
- Adult Basic Education (ABE) or English as a Second Language (ESL) (contextualized or other) in conjunction with training
- Customized Training
- Occupational Skills Training and Youth Occupational Skills Training
- Prerequisite Training
- Registered Apprenticeship
- Other Non-occupational Skills Training
- Job Readiness Training in conjunction with other training

Since WIOA has no sequence of service requirement, staff may determine training services are appropriate regardless of whether the individual has received basic or individualized career services first. However, it is a best practice for non-Youth programs that an Individual Employment Plan (IEP) is created prior to placing an individual into a training program. Under WIOA, training services may be provided if the staff determines after conducting an interview, an evaluation, or assessment, and career planning, that the individual meets the following criteria:

- Is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone.
- Has the skills and qualifications to successfully participate in the selected program of training services.
- Is unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as state-funded training funds or federal Pell Grants established under Title IV of the Higher Education Act of 1965, or requires WIOA assistance in addition to other sources of grant assistance, including federal Pell Grants.
- Is a member of a worker group covered under a petition filed for TAA and is awaiting a determination. If the petition is certified, the worker may then transition to TAA approved training. TAA requires that the participant receives an IEP (Activity Code 205) prior to enrolling them in TAA training service activity codes. If the petition is denied, the worker will continue training under WIOA.
- Is determined eligible in accordance with the state and local priority system in effect for adults under WIOA sec. 134(c)(3)(E) if training services are provided through the Adult funding stream.
- Selected a program of training services that is directly linked to the employment opportunities in the Local Workforce Development Area (Local Area) or the Regional Planning Unit, or in another area to which the individual is willing to commute or relocate.

*Per Monthly and Quarterly Financial Reporting Requirements ([WSD19-05](#))*, Title I recipients and subrecipients are required to follow the accrual basis of accounting. Therefore, training funds must be obligated prior to the start of a training service. Training services must be funded either through an Individual Training Account (ITA) or through a direct training contract. Training services must be provided via an ITA with an Eligible Training Provider, except in the following situations:

- WIOA 15 percent Governor's Discretionary funded training service.

- Adult or Dislocated Worker funded:
  - On-the-Job Training.
  - Customized Training.
  - Incumbent Worker Training.
  - Local Board Determination Training.
- Youth funded training service.
  - Out-of-school youth, ages 16 to 24, can (but are not required to) utilize an ITA.
  - In-school youth cannot use an ITA unless the ITA is funded by another funding stream.

WIOA 15 percent Governor’s Discretionary Fund and non-WIOA grant recipients and subrecipients should follow the requirements of their grant. For more guidance on WIOA 15 percent funds, please see WIOA 15 Percent Governor’s Discretionary ([WSD23-04](#)). For more guidance on the Eligible Training Provider List, refer to [WIB Directive TUL 23-04](#) ETPL Policy and Procedures or the most recent directive.

For Adult and/or Dislocated Worker participants, a training service activity code should only be added to the participant’s application if funds from one of the programs included in common exit are used to pay the cost of the training (in whole or in part), in addition to one of the following:

- The funds are paid via an ITA directly to the training provider.
- The funds are paid via a training contract for Incumbent Worker Training, Customized Training, On-the-Job Training, or other authorized exceptions for the use of an ITA.

If the training service is funded by a program that is not tracked in CalJOBS (e.g., Community College, Department of Rehabilitation, etc.) and an ITA or a direct contract with the training provider is not utilized to cover any portion of the total cost of training, a training service activity code should not be entered into CalJOBS. In this scenario, the use of activity code Placed in State and Local Training (non-TAA, non-WIOA) (313) should be entered into CalJOBS. This code is a basic career service (staff-assisted) and has a duration of one day. If staff would like to track the start and end date of the training, activity code Tracking for Non-WIOA Training (315) can also be used. Tracking for Non-WIOA Training (315) is only used for housekeeping purposes and does not restart the exit clock. Note that these two activity codes do not place the participant in the Credential Attainment or Measurable Skill Gains (MSG) performance measures. For more information on programs included in common exit, please refer to [TUL 22-04](#) Performance Guidance or the most recent directive.

For Youth participants who enter an education or training program during participation in the program, all training services (regardless of funding source) must be tracked using a training service activity code.

CalJOBS training activity codes do not have a set duration to allow for them to be open for the entirety of the training program. Multiple training service activity codes should not be entered due to gaps of time between instruction in the same training program (i.e., semester courses). New training service activity codes should only be added to the participant's application in the following, limited circumstances:

- A new program of study is started.
- Development of a new occupational goal accompanied with meaningful modifications to the participant's training plan.
- Start of a new program of study after an initial training has been completed.
- Concurrent programs of study with different training types.

Training services extend the date of exit in performance reporting. Detailed case notes must be maintained to document the participant's progress in the training program. To ensure training activity codes have an accurate Actual End Date, staff should check with the training provider each month to ensure participants are still in the training program. If not able to check monthly, staff must check at least quarterly.

### *Supportive Services*

Supportive services are designed to provide a participant with the resources necessary to enable their participation in career and/or training services. Supportive services may be made available to any participant in Title I career or training activities that is unable to obtain supportive services through other programs providing such services.

Title I Adult, Dislocated Worker, and Youth participants must be participating in staff-assisted basic career services, individualized career services, training services, and/or youth services to continue to receive supportive services. Supportive services should be funded by a funding stream that the individual is already a participant in.

Supportive services can be utilized to support a participant's participation in services not funded by the program if the service aligns with the participant's overall employment goals as outlined in their employment plan. For example, if a participant is attending Community College tuition-free as a result of the Promise Grant, and the Local Area does not utilize an ITA to fund the other costs associated to training, but does provide assistance with purchasing books, this is considered a supportive service (not a training service). Additionally, since the TAA and Wagner-Peyser programs cannot provide supportive services, if a participant needs supportive services,



they must be provided through Title I. Supportive services, other than youth services, do not extend the date of exit for performance accountability purposes.

Local Areas, in consultation with the AJCC partners and other community service providers, must develop a policy on supportive services that ensures there is resource and service coordination in the Local Area. At a minimum, the policy should address the following:

- Procedures for referral to such services, including how such services will be funded when they are not otherwise available from other sources.
- Establish limits on the provision of supportive services or provide the AJCC with the authority to establish such limits, including a maximum amount of funding and maximum length of time for supportive services to be available to a participant. Policies may also allow AJCCs to grant exceptions to these limits.
- Ensures that supportive services are WIOA-funded only when these services are not available through other agencies and that the services are necessary for the individual to participate in Title I activities.

Supportive services must be entered in CalJOBS and tracked based on Local Area policy, if applicable. Supportive services must be in conjunction with another program-funded staff-assisted basic career service, individualized career service, training service, and/or youth service. To add a supportive service activity code in CalJOBS, the activity code for the staff-assisted basic career service, individualized career service, training service, and/or youth service must be entered first and be open. ***For more information on supportive services, refer to WIB Directive [TUL 17-02](#) WIOA Title I Adult, Dislocated Worker, and Youth Supportive Services Policy or the most recent directive.***

WIOA 15 percent Governor's Discretionary Fund and non-WIOA grant recipients and subrecipients should follow the requirements of their grant.

#### *Follow-up Services*

Follow-up services are critical services provided to help ensure the individual is successful in employment and/or postsecondary education and training. Follow-up services can only be provided if it is expected that the participant will not receive any further services other than follow-up from any program included in common exit. The types of follow-up services provided and the duration of services must be determined based on the needs of the individual and therefore, the type and intensity of follow-up services may differ for each participant. The following outlines the program-specific requirements for follow-up services:

- For Adult and Dislocated Worker participants, the opportunity to receive follow-up services must be offered to all participants who are placed in unsubsidized employment, for up to 12 months after the first day of employment unless the participant declines to

receive services or they cannot be located. The purpose of follow-up services should be to help the participant to be successful in employment and/or postsecondary education and training.

- For Youth participants, the opportunity to receive follow-up services must be offered to all participants for one year after exit from the program unless the participant declines to receive services, or they cannot be located.

Follow-up services must include more than only a contact attempt, or a contact made for securing documentation to report a performance outcome. The provision of follow-up services does not extend the date of exit and does not trigger re-enrollment in the program.

WIOA Title I recipients and subrecipients must establish policies that define what are appropriate follow-up services, as well as policies for identifying when to provide follow-up services to participants. Supportive services may be provided during follow-up. ***For more information on follow-up services, refer to WIB Directive [TUL 19-06](#) WIOA Title I Adult and Dislocated Worker Follow-up Services or the most recent directive.***

#### *Housekeeping*

These activity codes are used for tracking purposes. This category is not reportable to the DOL.

#### **Co-funded Services**

CalJOBS collects data for services funded by the following funding streams under the Title I WIOA application:

- Formula funds (e.g., Title I Adult, Dislocated Worker, and Youth)
- 15% Governor's reserve funds (i.e., Statewide Adult, Statewide Dislocated Worker, and Statewide Youth)
- Statewide Rapid Response Additional Assistance
- National Dislocated Worker Grant
- Non-WIOA Special Grant
- Local Funded Grant

Title I recipients and subrecipients may choose to leverage resources and fund a single service with more than one funding stream. For example, a Local Area may fund a participant's occupational skills training program with funds from the Title I Youth and Adult programs. Recipients and subrecipients of non-WIOA grants, should reach out to their Project Manager on the allowability of co-funding services. While more common with a training service, any service type can be co-funded.

Duplicate activity codes should not be entered into CalJOBS for the same service. Since CalJOBS does not allow multiple funding streams to be attached to one activity code, the following

outlines how to document the activity codes in CalJOBS to ensure the service is reported appropriately to the DOL (not duplicated or omitted from a funding stream):

1. If the individual is already a participant (i.e., eligibility is completed and received a participant-level service) in each program's funding stream that is co-funding the service:
  - a. Add the appropriate activity code and associate it to any of the funding streams funding the service.
    - i. If co-funding WIOA funds with a non-WIOA grant, the activity code must be associated to a WIOA funding stream.
  - b. Then, add activity code 010 Tracking Co-funded Services and associate it to the other funding stream funding the service.
    - i. If there are more than two funding streams co-funding the service, then multiple activity code 010s should be entered for each funding stream. A case note must be added to indicate which activity was co-funded by which funding streams.

The following is an example:

An individual has eligibility completed for the Adult program and received a 205 Development of an IEP funded by Adult formula funds and a 203 Objective Assessment funded by Adult Statewide 15% funds.

The participant is then enrolled in Occupational Skills Training that is co-funded by both Adult formula and Adult Statewide 15% funds. Since the individual is already a participant in both funding streams, activity code 300 Occupational Skills Training (Approved ETPL Provider) must be added and can be associated to either Adult formula or Adult Statewide 15% funding streams.

In this instance, if the 300 Occupational Skills Training (Approved ETPL Provider) activity code is associated to Adult formula funds, then activity code 010 Tracking Co-funded Services is added and must be associated to Adult Statewide 15% funds.

2. If the individual **does not** already have a participant-level service associated to each funding stream that is co-funding the service, do the following:
  - a. Add the appropriate activity code and associate it to the funding stream where there is not a participant-level service.
    - i. If co-funding WIOA funds with a non-WIOA grant, the activity code must be associated to a WIOA funding stream.
  - b. Then, add activity code 010 Tracking Co-funded Services and associate it to the other funding stream(s) funding the service.
    - i. If there are more than two funding streams co-funding the service, then multiple activity code 010s should be entered for each funding stream. A

case note must be added to indicate which activity was co-funded by which funding streams.

The following is an example:

An individual has eligibility completed for the Dislocated Worker program and received a 205 Development of an IEP funded by Dislocated Worker formula funds. The participant has also been determined eligible for a Statewide Rapid Response Additional Assistance grant but has not received any services funded through that grant.

The participant is then enrolled in on-the-job training that is co-funded by both Dislocated Worker formula and Statewide Rapid Response Additional Assistance grant funds. Since the individual is already a participant in the Dislocated Worker formula funding stream, activity code 301 On-the-Job Training must be added and associated to the Statewide Rapid Response Additional Assistance grant.

Then activity code 010 Tracking Co-funded Services is added and must be associated to Dislocated Worker formula funds.

3. If the individual is being provided a co-funded Supportive Service, the individual must already be a participant (i.e., eligibility is completed and received a participant-level service) in each program's funding stream that is co-funding the Supportive Service:
  - a. Add the appropriate activity code and associate it to any of the funding streams funding the service.
    - i. If co-funding WIOA funds with a non-WIOA grant, the activity code must be associated to a WIOA funding stream.
  - b. Then add activity code 010 Tracking Co-funded Services and associate it to the other funding stream funding the service.
    - i. If there are more than two funding streams co-funding the service, then multiple activity code 010s should be entered for each funding stream. A case note must be added to indicate which activity was co-funded by which funding streams.

The following is an example:

An individual who has eligibility for the Youth program, received 412 Objective Assessment, 413 Development of an IEP, and 428 Youth On-the-Job Training funded by the Youth program. The individual also has eligibility completed for the Adult program and received a 102 Initial Assessment funded by Adult formula funds.

The participant is provided a supportive service for transportation assistance funded by both Adult and Youth formula funds. Since the individual already received a participant

level service funded by both the Adult and Youth formula funds, the Supportive Service activity code must be added and can be associated to either Adult or Youth formula funding streams.

In this instance, if the 181 Supportive Service: Transportation Assistance activity code is associated to Adult formula funds, then activity code 010 Tracking Co-funded Services is added and must be associated to Youth formula funds.

For further clarification, or assistance with how a specific example should be documented, reach out to your MIS Administrator or Project Manager.

If a Local Area uses Advanced Individual Fund Tracking (AIFT), they will still need to follow the guidance above for how to enter a co-funded service. The Fund Stream will need to be set up so all Customer Groups can access the Fund Stream. In the activity code's Enrollment Budget tab, all applicable Fund Streams that are co-funding the service can be selected. For more information on the use and functionality on the AIFT module, please refer to the IFT User Guide on Staff Online Resources in CalJOBS.

### **Entering CalJOBS Activity Code Information for Individuals**

The CalJOBS system captures activity code information that is required to be reported to meet state and/or federal requirements. CalJOBS activity codes must be added directly to the individual's program application on the Case Management Profile – Programs tab to ensure the program application is current, complete, and has the appropriate eligibility, services are appropriately documented, and to reduce duplication of services across funding streams. Activity codes should not be added via the Activity History/Service Plan.

The following are descriptions and guidance for common fields when entering a CalJOBS activity code. Not all fields apply to all programs or customer groups.

#### **General Activity Code Information**

- **Customer Group** – Customer groups are the programs and funding streams the individual is eligible for. The customer group(s) that display for selection in the drop-down menu are based on the eligibilities completed and funding stream(s) selected in the corresponding program application.
- **Activity Code** – An activity code is the number and name representing the service. The activity codes that display for selection align with the customer group selected. For a complete list of activity codes and their definitions, please see Attachment A.
- **Service Provided (Virtual/Online)** – Indicates how the service was provided (in person, virtual, or a mix).
- **Special Project** – Indicates if the service is funded by a special project (e.g., Deaf and Hard of Hearing or YEOP).

### Activity Code Dates

- Projected Begin Date/Scheduled Date – The planned start date for the service. This is only required if the service is planned for a future date. Services with a Projected Begin Date/Scheduled Date will extend the exit clock (if applicable). Activity codes that have a Projected Begin Date/Scheduled Date will system close 30 days after the Projected Begin Date/Scheduled Date if no Actual Begin Date/Actual Service Date is entered.
- Actual Begin Date/Actual Service Date – The first date of the service. This is not required if the service is planned for a future date. Services without an Actual Begin Date/Actual Service Date are not reported to the DOL. For training or education services, the Actual Begin Date is considered the first day the participant attends the training (either virtually or in person) as described in the ITA or training contract. Training begin dates are not based on training plan dates, case management phases, semester dates, training voucher dates, supportive service dates, etc.
- Projected End Date – The anticipated last date of the service. Activity codes that have a Projected End Date will system close 30 days after the Projected End Date if no Actual End Date is entered. The Actual End Date will reflect the Projected End Date. To ensure data is reflected and reported accurately, staff should ensure that the activity code is closed appropriately.
- Actual End Date/Actual Service Date – The last date of the service. For training or education services, the Actual End Date is the last date the participant attended any service provided as part of the training program as described in the ITA or training contract. Training end dates are not based on training plan dates, case management phases, semester dates, training voucher dates, supportive service dates, etc.

### Service or Training Provider Information

- Provider – The service or training provider delivering the service. This field is required for training and education services. The information for this field pulls from the training or education provider/program profile in the system.
- Service, Course or Contract – The name of the service or course (training program). This field is required for training and education services. The information for this field pulls from the training or education provider/program profile in the system.
- Occupational Training Code – The occupation code associated to the service or course (training program). This field is required for training and education services. The information for this field pulls from the training or education provider/program profile in the system. The occupation code should represent the participant's employment goal.
- Total Enrollment Cost – Total cost of training program, including books, tools, and other costs. The information for this field pulls from the training or education provider/program profile in the system. For WIOA Title I recipients and subrecipients, if

the ITA or training contract price is different, the cost needs to be updated to reflect the price WIOA is paying to the provider. This information is only required when the participant attends a training or education program.

- Financial Aid – Federal or state educational grant funds used to help a student pay for education. For training and education services, the receipt of Pell Grant funds is required to be reported. If an individual receives Pell Grant funds, the information is required to be entered into the Financial Aid section of the CalJOBS activity code or in the Public Assistance section of the program application.

#### Activity Code Completion Status

- Completion Code – Indicates the outcomes of the service. The following are the options available:
  - Successful Completion – Service was provided and completed successfully.
  - Unsuccessful Completion – Service was provided but was not completed successfully for reasons other than dropping out of the service.
  - Unsuccessful Completion – Failed to Report – Service was scheduled but was not provided due to the individual failing to report or attend the service. This option is only available for Title III Wagner-Peyser services.
  - Unsuccessful Completion – Dropped Out – Service was started but was not completed successfully due to the participant dropping out of the service.
  - System Closed – Service closed by the system due to inactivity. The service is automatically closed when the completion status is not updated within 30 days of the Projected End Date, or an Actual Begin Date is not entered within 30 days of the Projected Begin Date. To ensure data is reflected and reported accurately, staff should ensure that the activity code is closed appropriately, which includes verifying the Actual End Date, Completion Code, and school status on the last day of service (for Youth only) is accurate.
  - Void – The service was entered incorrectly and cannot be corrected via a Data Change Request (DCR), the service was added to the wrong program application, or the service was not provided to the individual. Activity codes that are voided are not reported to the DOL and do not extend the exit clock. There should be a minimal number of voided activity codes. Please note that the ability to void an activity code is based on system privileges.

All services with an Actual Begin Date/Actual Service Date are used for state and/or federal reporting requirements unless the completion status is “Void”.

#### ***System Closed Activities***

***Activities that are not updated within 30 calendar days of the activity's Projected Begin or End Date frame will automatically receive a "System Closed" status. Once an activity is system-closed, it cannot be updated directly by Subrecipients, or by the WIB MIS administrator.***

***System-closed activities are included in performance calculations, highlighting the critical importance of maintaining data entry accuracy and timeliness. Therefore, Subrecipients must establish procedures to ensure records are updated within 30 calendar days of the activity's Projected Begin or End Date to prevent a "System Closed" completion status.***

***If updates are needed for a system closed activity, Subrecipients must submit a request to the WIB to initiate a Data Change Request (DCR) with EDD. The request must include:***

- 1. A completed WIB DCR Spreadsheet Form (Attachment E)***
  - This form should clearly detail the necessary updates required for the activity***
- 2. An explanation of the closure***
  - Include the reason for the system closure and outline the corrective measures implemented to prevent future occurrences.***

***Requests must be submitted via email to both the WIB Deputy Director of Administration and the WIB MIS Administrator.***

#### ***DCR Review and Approval Process***

***Upon receipt of request, the WIB Deputy Director and the WIB MIS Administrator will evaluate the overall impact of the proposed change. Each request will be reviewed on a case-by-case basis, with approval contingent on the details provided.***

***If the DCR is approved by the WIB Deputy Director, the WIB MIS Administrator will proceed with the necessary actions in accordance with the [Data Change Request Form Procedure \(WSD18-02\)](#).***

#### ***Entering Local Status Tracking for Individuals***

***In addition to CalJOBS activity codes, Subrecipients must enter local status tracking codes for individuals on the General Profile—Activities tab for participants, as identified in statements of work for specific grants. The WIB uses local status tracking codes to monitor activities and outcomes that standard CalJOBS activity codes do not capture, which the grant requires. This process ensures that the WIB can gather detailed data necessary for reporting, compliance, and program evaluation.***

#### ***Services for Employers***



In addition to serving individual job seekers, the workforce system provides various types of services to employers: employer information and support services, workforce recruitment assistance, strategic planning/economic development, assistance with accessing untapped labor pools, training services (including Incumbent Worker Training), rapid response assistance, and layoff aversion activities.

Employer services are required to be reported to the DOL. Title III Wagner-Peyser, TAA, and JVSG staff are required to enter employer services into CalJOBS using employer activity codes. Local Areas are required to track and report employer services to the EDD but are not required to utilize CalJOBS. For additional information on the data requirements for employer services, please reference [TUL 22-04](#) Performance Guidance or the most recent directive.

### **Resources**

To ensure the EDD reports accurate data to the DOL, each CalJOBS activity code's definition was closely reviewed to ensure the definition clearly reflects the intent behind the service provided and meets the requirements of the program(s). The number, name, and definition for each activity code can be found in the CalJOBS Activity Codes Dictionary (Attachment A). The definitions provided apply to all funding streams. Questions on service delivery or allowable types of services should be directed to the appropriate contact (i.e. Regional Advisor, Project Manager, Program Coordinator, etc.).

In addition to definitions, the CalJOBS Activity Codes Detailed Listing – Individual (Attachment B) provides additional information about each activity code. The following information provides clarification and direction for each of the items in Attachment B:

- Program Affiliation – These columns identify, with an “x,” which program(s) can utilize each activity code.
- Reporting Category – This column includes the reporting category for each activity code. Refer to the Service Types for Individuals section of this directive for more details on the reporting categories.
- Restart the Exit Clock? – This column lists whether the activity code restarts the 90-calendar day exit clock.
- PIRL – This column lists all the PIRL data elements where the activity code is reported.
- Duration (Days) – This column lists how far into the future the activity code's Projected End Date can be set.

Most activity codes have been set to a one-day duration. One example of this is activity code 205 Development of an IEP. While an IEP is a living document that should be revisited throughout the participant's period of participation, the development of an IEP is not an ongoing service. If the IEP needs to be revised or updated, an additional activity code 205 should be entered into CalJOBS at that

time. Alternatively, training service activity codes will not have a set duration date. However, these should be frequently reviewed by staff to ensure accurate reporting of the Actual End Date. Select activity codes can be projected out up to 90 or 180 days, with the ability to be extended for a total of 360 days.

Each activity code must have start and end dates that represents the actual dates the service occurred.

To assist with understanding how CalJOBS activity codes impact WIOA performance indicators, the CalJOBS Activity Codes and Performance Crosswalk (Attachment C) indicates, with an “x,” the activity codes that trigger inclusion in the Credential Attainment and/or MSGs performance measures. For more information on Credential Attainment and MSG performance measures, refer to [TUL 22-04](#) Performance Guidance or the most recent directive.

In addition to individual activity codes, CalJOBS activity codes can be added to employer accounts. A full list of employer-related CalJOBS activities codes, including their reporting category can be found in the CalJOBS Activity Codes Detailed Listing – Employer (Attachment D). These activities are reported to the DOL and are specifically tied to the Effectiveness in Serving Employers performance measures.

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**ACTION:**

Please bring this Directive to the attention of all WIB Subrecipients and WIB Staff.

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**INQUIRIES:**

Please direct inquiries regarding this Directive to the WIB at (559) 713-5200.



Adam Peck  
Executive Director

APPROVED BY  
WORKFORCE INVESTMENT BOARD  
MINUTES OF 03-12-2025

**ATTACHMENTS:**

- Attachment A ([CalJOBS Activity Codes Dictionary](#))
- Attachment B ([CalJOBS Activity Codes Detailed Listing - Individual](#))
- Attachment C ([CalJOBS Activity Codes and Performance Crosswalk](#))
- Attachment D ([CalJOBS Activity Codes Detailed Listing - Employer](#))
- Attachment E ([WIB DCR Spreadsheet Form](#))
- Attachment F (Summary of Comments)

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The Workforce Investment Board of Tulare County is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.

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# SUMMARY OF COMMENTS

## *Directive Local Policy: TUL 25-02 CalJOBS<sup>SM</sup> Activity Codes*

There are three comments to the draft version of this directive:

**Comment #1:** Page 3 “...any other workforce or WIB grant utilizing CalJOBS are required to enter data via the CalJOBS system within a 20-day period from when the activity occurred or the 10th day of the following month, whichever occurs first”.

Some WIB grants have performance due dates of the 5th of a following month, does the applicable statement of work supersede this directive for activity due dates?

**Response:** For WIOA Title I, NDWG, and any other workforce or WIB grant utilizing CalJOBS, if the specific statement of work explicitly outlines performance due dates earlier than the general 20-day entry requirement, staff must adhere to the stricter deadline requirements to ensure compliance with applicable procedures.

**Comment #2:** Page 9 “To ensure training activity codes have an accurate Actual End Date, staff should check with the training provider each month to ensure participants are still in the training program. If not able to check monthly, staff must check at least quarterly”

The local TUL 24-08 Directive states, “Attendance should be verified monthly by obtaining attendance records from the training provider and uploading them to the participant file” and the career coach must verify monthly attendance with the participant” on page 14.

“Additionally, the career coach will conduct quarterly contacts with the training provider to confirm the participant’s continued enrollment in the training program.

What are potential circumstances that would constitute “not able to check monthly” in this directive, and does this directive supersede the ITA directive which states to verify monthly attendance with participants, and quarterly with training provider?

**Response:**

No, this directive does not supersede WIB Directive TUL 24-08: Individual Training Accounts (ITAs) Policy and Procedures. TUL 24-08 outlines policies and procedures for ITAs, including case management guidelines, whereas the CalJOBS Activity Codes directive strictly pertains to data entry of activity codes in CalJOBS.

This directive incorporates State guidance requiring monthly checks with training providers but allows for quarterly verification if monthly verification is not feasible. The ITA Directive, section **11. Collect Attendance Records**, referenced in Comment # 2, aligns with this approach by providing an alternative method when monthly verification with the training provider is not possible. The CalJOBS Activity Codes Directive applies specifically to attendance verification for

data entry, including closing training activity codes and determining Actual End Dates, without overriding ITA case management requirements.

Specific examples of circumstances preventing staff from being able to check monthly with training providers may vary case by case and will not be listed.

**Comment #3:** Throughout the state directive WSD24-05, there are multiple references to the WIOA 15 Percent Governor's Discretionary Fund. Is there a reason why the WIB's directive excludes the WIOA 15 Percent Governor's Discretionary Fund from the local policy directive? Does the WIB not intend to receive or actively use these funds?

**Response:** The directive has been updated to include references to the *WIOA 15 percent Governor's Discretionary Fund*.

WIOA 15 Percent Governor's Discretionary Funded programs, along with all WIB workforce grants utilizing CalJOBS, must adhere to the guidance outlined in this directive unless otherwise specified in the statement of work. The WIB generally refers to WIOA 15 Percent Governor's Discretionary Funded programs as specialized grants or WIB-funded programs.