CalJOBS℠ “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 CalJOBS℠.

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

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Activity / Provider</th>
<th>Actions</th>
<th>Funding / Grant</th>
<th>Projected Begin Date</th>
<th>Actual Begin Date</th>
<th>Projected End Date</th>
<th>Actual End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>205 - Development of IEP/ISS/EDP No Provider Information</td>
<td>W</td>
<td>Adult</td>
<td>06/05/2019</td>
<td>06/05/2019</td>
<td>06/05/2019</td>
<td>06/05/2019 05/05/2019 Successful Completion</td>
</tr>
</tbody>
</table>

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.

![Plan Tab Image](image)

• **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 Image](image)

**Objective Assessment Summary**

1. [Create 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):
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

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.”
• 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:

**Objective Assessment Summary**

<table>
<thead>
<tr>
<th>#</th>
<th>LWIA/Region</th>
<th>Office Location</th>
<th>Program</th>
<th>Staff</th>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2089</td>
<td>City of Los Angeles</td>
<td>00312 Hollywood North Worksource Center--JS</td>
<td>Title I - Workforce Development (WIOA)</td>
<td>Staff11. Lai</td>
<td>06/04/2019</td>
<td>Edit Delete Print</td>
</tr>
</tbody>
</table>

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

**When printing plan do you want print services?**
In the “Individual Signature” section, select the option to “Include Staff Signature.” Then, select “Print.”

**Individual Signature**

- [ ] Create PDF
- [x] 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).