

## CALJOBS<sup>SM</sup> ACTIVITY CODES

### EXECUTIVE SUMMARY

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This policy provides the guidance and establishes the procedures regarding the use of activity codes. This policy applies to staff who input data into CalJOBS for the following programs: *Workforce Innovation and Opportunity Act (WIOA) Title I Adult, Dislocated Worker and Youth programs, Title III Wagner-Peyser, Jobs for Veterans State Grant (JVSG), and Migrant Seasonal Farmworker (MSFW), Trade Adjustment Assistance (TAA) program, National Dislocated Worker Grant (NDWG), and National Farmworker Jobs Program (NFJP).* These updates will go into effect January 1, 2020.

This policy contains no state-imposed requirements.

This Directive finalizes Workforce Services Draft Directive *CalJOBS Activity Codes (WSDD-202)*, issued for comment on August 30, 2019. The Workforce Development Community submitted 32 comments during the draft comment period. A summary of comments, including all changes, is provided as Attachment 5.

This policy supersedes Workforce Services Information Notice *CalJOBS Activity Codes (WSIN17-09)*, dated September 29, 2017. Retain this Directive until further notice.

### REFERENCES

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- WIOA (Public Law 113-128) Sections 129 (b)(2) and 134 (a)(3)(C)(2)
- Training and Employment Guidance Letter (TEGL) 10-16, Subject: *Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs* (December 19, 2016)
- TEGL 19-16, Subject: *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)

*The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.*

- TEGL 21-16, Subject: *Third Workforce Innovation and Opportunity Act (WIOA) Title I Youth Formula Program Guidance* (March 02, 2017)
- TEGL 14-18, Subject: *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)
- 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 WSD19-03, Subject: *Performance Guidance* (August 28, 2019)
- Workforce Services Directive WSD15-07, Subject: *WIOA Eligible Training Provider List – Policy and Procedures* (November 10, 2015)

## BACKGROUND

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The WIOA provides a workforce system that delivers career and training services throughout California at the America’s Job Centers of California<sup>SM</sup> (AJCC). For staff who enter data into CalJOBS, these services are tracked in the CalJOBS system through the use of CalJOBS activity codes. Activity codes can be applied to an individual or employer account.

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 WSD19-03.

The DOL issued additional WIOA performance reporting guidance, which created a need for a revised list of activity codes. In addition, revisions were made based on the DOL review conducted in September of 2018. Each activity code was analyzed to determine that it aligned with WIOA law and regulations.

## POLICY AND PROCEDURES

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To ensure the EDD reports accurate data to the DOL, each CalJOBS activity code’s definition was closely reviewed to ensure the definition clearly reflected the intent behind the service provided, and met 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 1).

In addition to definitions, the *CalJOBS Activity Codes Detailed Listing – Individual* (Attachment 2) provides additional information about each activity code, including which program(s) and reporting category it is associated with, as well as whether or not it extends the exit clock, what PIRL Data Element it is associated with, and the duration (in days) that the activity can be kept open for. Each activity code was cross-referenced against the updated PIRL to ensure it is associated to the appropriate PIRL Data Element, program(s), and reporting categories. Each activity code was also analyzed to verify whether or not the activity code should restart the clock (per TEGL 10-16, Attachment 7, Tables A & B and TEGL 14-18, Appendix III).

The following information provides clarification and direction for each of the items in Attachment 2.

### **Program Affiliation**

These columns identify, with an “x,” which program can utilize each activity code.

### **Reporting Category**

This column includes the reporting category for each activity code. The possible categories are as follows:

- **Basic Career Services**

Basic career services are universally accessible and must be made available to all individuals seeking employment and training services. Generally, these services involve less staff time and involvement and include services such as initial skill assessments, labor exchange services, provision of information on programs and services, and program referrals. [TEGL 19-16]

- **Self-Service** – Self-service 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 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 activities do not extend the date of exit in performance reporting. [WIOA Rules and Regulations, § 677.150(a)(3)(ii)]

Self-Service activity codes provided by Wagner-Peyser, JVSG, or MSFW staff should be recorded under customer group Self-Service/Registered Individual Only in the Title III – Wagner-Peyser application.

- **Information-Only Services or Activities** – These services provide readily available information that does not require an assessment by a staff member of the individual’s skills, education, or career objectives. Information-Only services do not extend the date of exit in performance reporting. [WIOA Rules and Regulations, § 677.150(a)(3)(iii)]

Self-Service activity codes provided by Wagner-Peyser, JVSG, or MSFW staff should be recorded under customer group Self-Service/Registered Individual Only in the Title III – Wagner-Peyser application.

- **Staff-Assisted** – Staff-Assisted services are those services other than self-service and information-only services or activities. Staff-Assisted services do extend the date of exit in performance reporting. [WIOA Rules and Regulations, § 677.150(a)(3)]

- **Individualized Career Services**

Individualized career services must be provided to participants after AJCC 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 do extend the date of exit in performance reporting. [TEGL 10-16]

- **Training Services**

AJCC staff may determine training services are appropriate, regardless of whether the individual has received basic or individualized career services first as WIOA has no sequence of service requirement. Under WIOA, training services may be provided if the AJCC 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 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.

Training services, when determined appropriate, must be provided either through an Individual Training Account (ITA) or through a training contract. Except in certain instances, training services must be provided by an Eligible Training Provider (ETP). For more guidance on the Eligible Training Provider List (ETPL), refer to WSD15-07.

Training services do extend the date of exit in performance reporting and do not have a duration limit. Detailed case notes must be recorded in CalJOBS to document the participant's progress in the training program.

- **Supportive Services**

Supportive services are designed to provide a participant with the resources necessary to enable their participation in career and 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, and/or training services to continue to receive supportive services. All Title I participants may receive supportive services during follow-up. Supportive services should be funded by the same program as the career or training service (i.e. the supportive service funds should come from a program that they individual is already a participant in). TAA and WP participants are not eligible for supportive services. If supportive services are needed, these must be provided through Title I. Supportive services do not extend the date of exit for performance accountability purposes. [TEGL 10-16 and TEGL 21-16]

Supportive services should be entered in CalJOBS and tracked based on Local Area policy. However, an open staff-assisted basic career service, individualized career service, or training service must be open in order to add a supportive service in CalJOBS.

- **Follow-up Services**

Follow-up services may begin immediately following the last date of service if it is expected that the participant will not receive any future services other than follow-up

services. Provision of follow-up services does not extend the date of exit and do not trigger re-enrollment in the program. [TEGL 10-16]

For Adult and Dislocated Worker participants, Local Areas must provide follow-up to participants who are placed in unsubsidized employment, for up to 12 months after the first day of employment. Local Areas must establish policies that define what are considered to be appropriate follow-up services, as well as policies for identifying when to provide follow-up services to participants.

Follow-up services are critical services provided following a participant's exit from the program to help ensure the individual is successful in employment and/or postsecondary education and training. Supportive services may be provided during follow-up.

- **Youth Career Services**  
Youth services are only available for eligible youth between ages 14-24. [TEGL 21-16]
- **Miscellaneous**  
Tracking for information purposes. This category is not reportable to DOL. [TEGL 10-16]

#### **Restart the Exit Clock?**

This column lists whether the activity code restarts the 90 calendar day exit clock.

#### **PIRL**

This column lists all of 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. Per the DOL review, activity codes were revised to shorten the duration or length of time that an activity can be kept open. Previously, the system allowed staff to set a projected end date far into the future, which impacts the exit date of participants. The DOL review provided guidance indicating that activity codes must have start and end dates that represent the actual dates the services are occurring.

Most activity codes have been set to a one day service. One example of this is activity code 205 – Development of IEP/ISS/EDP. 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 activity codes will not have a set duration date; however, these should be frequently reviewed by staff to ensure accurate reporting. 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.

To assist with understanding how CalJOBS activity codes impact WIOA performance indicators, the *CalJOBS Activity Codes and Performance Crosswalk* (Attachment 3) indicates, with an “x,” the activity codes that trigger inclusion in the Measurable Skill Gains (MSGs) and/or Credential Attainment performance measures. The crosswalk is intended to aid staff in identifying the inclusion of a participant in the measure. For more information on MSG and Credential Attainment performance measures, refer to WSD19-03.

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 4). These activities are reported to DOL and are specifically tied to the Effectiveness in Serving Employers performance measures. [TEGL 10-16, Attachment 4, Table B]

## ACTION

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Please bring this directive to the attention of all affected staff.

## INQUIRIES

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Questions regarding the use of Activity Codes can be directed to the Program Reporting and Analysis Unit at [WSBManagePerformance@edd.ca.gov](mailto:WSBManagePerformance@edd.ca.gov).

/s/ JAIME L. GUTIERREZ, Chief  
Central Office Workforce Services Division

Attachments are available on the internet:

1. [CalJOBS Activity Codes Dictionary \(PDF\)](#)
2. [CalJOBS Activity Codes Detailed Listing – Individual \(PDF\)](#)
3. [CalJOBS Activity Codes and Performance Crosswalk \(PDF\)](#)
4. [CalJOBS Activity Codes Detailed Listing – Employer \(PDF\)](#)
5. [Summary of Comments \(PDF\)](#)
6. [Errata Chronology \(PDF\)](#)