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# OC Community Resources

May 21, 2021

**To:** WIOA Subrecipients of the Orange County  
Workforce Development Area

**From:** Carma Lacy  
Director of Workforce Development

**Subject:** CalJOBS Referrals Desk Procedures

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## **PURPOSE**

To provide guidance on the roles and responsibilities of the Workforce Innovation and Opportunity Act (WIOA) Title I service providers and the WIOA Orange County One-Stop partners when referring individuals to programs and services.

## **EFFECTIVE DATE**

This procedure is effective immediately upon issuance.

## **PROCEDURE**

The Orange County Workforce Development Board (OCWDB) is implementing a procedure to streamline the referral process for WIOA Title I service providers and WIOA Orange County One-Stop partners. This process will allow service providers and partners to send and receive referrals by using the CalJOBS system. Service provider staff and partner staff will have access to send and receive referrals in CalJOBS. As authorized users of CalJOBS, service provider and partner staff must complete a confidentiality agreement and access request form provided by OCWDB staff. In addition, staff must complete the necessary Equal Employment Opportunity (EEO) training, per 188 WIOA Nondiscrimination and Equal Opportunity Regulations (29 CFR Part 38), provided by the Equal Opportunity Officer.

Refer to Attachment I of this procedure for guidance on sending and receiving referrals in CalJOBS.

## **Process for Sending Referrals**

- Confirm individual needing additional services has a registered CalJOBS user account.
- Locate a provider to send the referral to in CalJOBS based on the individual services needed.
- Send the referral to the provider via CalJOBS indicating the referral reason.



COMMUNITY INVESTMENT DIVISION  
1300 SOUTH GRAND  
BLDG. B, FIRST FLOOR  
SANTA ANA, CA 92705  
PHONE: 714.480.6500  
FAX: 714.567-7132

- If an email is not received from the referral recipient within five (5) business days, email the provider contact to confirm receipt of the referral and request the status of the referral. The provider contact's email address and phone number are located in CalJOBS and can be found within the Provider Information section of the referral.

### **Process for Receiving Referrals**

- CalJOBS will send a system-generated email when a referral has been submitted. Once the referral is received, contact must be made with the individual within 48 hours or two (2) business days.
- Send a courtesy email to the referring staff confirming receipt of the referral and provide information on the status of the referral. The referring staff's email address can be found at the bottom of the CalJOBS system-generated email.
- The Referral Result must be updated in CalJOBS within five (5) business days of the referral being received.
- Provide service to individual based on referral and continue to communicate with referring staff, if necessary.

The WIOA Title I service providers and the WIOA Orange County One-Stop partners will be responsible for monitoring the Staff Referrals Reports in CalJOBS. The numbers of referrals made and received must be included in the monthly service provider performance report. See Attachment II for guidance on how to run Staff Referrals Reports.

### **ACTION**

Bring this policy to the attention of all staff and all relevant parties.

### **INQUIRIES**

If you have any questions regarding this policy, please contact your Contract Administrator at 714-480-6500.

### **ATTACHMENT**

Attachment I: CalJOBS Referral & Follow-Up Tutorial

Attachment II: CalJOBS Staff Referrals Reports Tutorial

# CalJOBS Referral & Follow-Up Tutorial

Presented By:  
OCCS Workforce & Economic Development Division



READY S.E.T. OC  
WIOA Youth Program

America's **JobCenter**  
of California™

OC Community Services



County of Orange




# Instructions for Sending a Referral

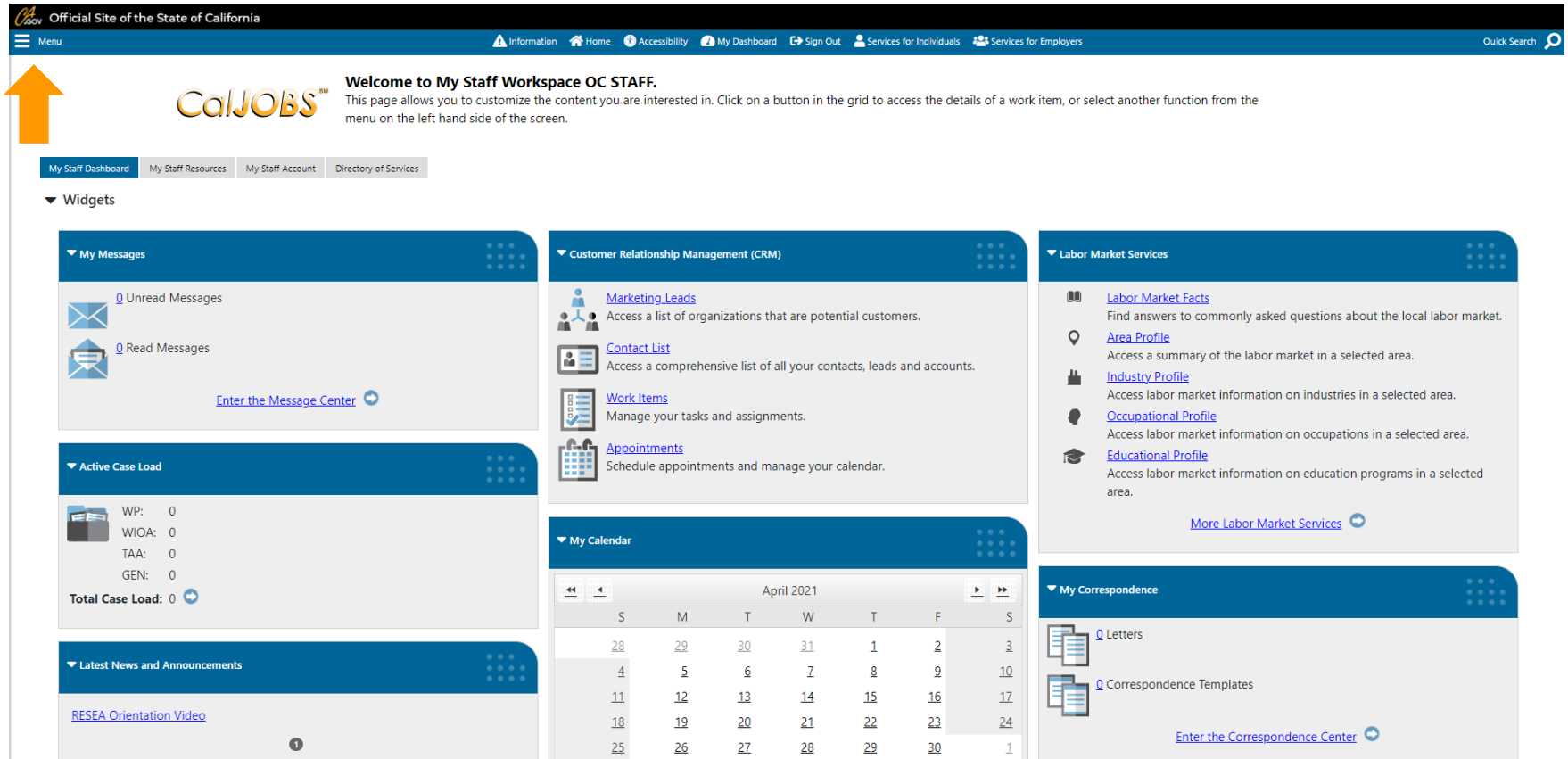


**IMPORTANT:** Before you can send a referral, you must ensure the individual you are assisting has a CalJOBS individual jobseeker account. If the individual does not have a CalJOBS account, direct them to [www.caljobs.ca.gov](http://www.caljobs.ca.gov) to register for an **Individual** account by first clicking on **Sign In**. Once the individual has completed account registration, you may now proceed with the referral process.

The screenshot shows the CalJOBS website interface. At the top right, there is a navigation bar with "En Español" and a "Sign In" button, which is highlighted with an orange arrow. Below this is a main banner with the text "Supporting the people of California in Getting Back to Work" and a "Click Here to Get Started" link. A secondary navigation bar contains "Option 3 - Create a User Account". Below this, a text block explains the registration process and provides a link to "Why Register?". At the bottom, there are three account type options, each with an icon, a title, an estimated registration time, and a description. An orange arrow points to the "Individual" option.

 <b>Individual</b> 13 min(s) estimated	 <b>Employer</b> 14 min(s) estimated	 <b>Provider</b> 10 min(s) estimated
Register as this account type if you are an individual and wish to search for the latest job openings, post a resumé online, find career guidance, search for training and education programs, find information on local employers, etc.	Register as this account type on behalf of your company. Here you will gain access to industry data, labor market information and job applicants for your business. You can also post job openings online.	Register as this account type if you are a training provider who wishes to enter or update your available courses for use in the system. Once a new account request is approved, you will be able to enter information about your courses, such as costs, schedules, credentials, etc. Providers can also request WIOA approval for specific courses.

# 1. Sign into CalJOBS with your staff user account and click on **Menu**, located in the upper, left corner.



Official Site of the State of California

Menu Information Home Accessibility My Dashboard Sign Out Services for Individuals Services for Employers Quick Search

## CalJOBS™ Welcome to My Staff Workspace OC STAFF.

This page allows you to customize the content you are interested in. Click on a button in the grid to access the details of a work item, or select another function from the menu on the left hand side of the screen.

My Staff Dashboard My Staff Resources My Staff Account Directory of Services

▼ Widgets

▼ My Messages

0 Unread Messages

0 Read Messages

[Enter the Message Center](#)

▼ Active Case Load

WP: 0  
WIOA: 0  
TAA: 0  
GEN: 0

**Total Case Load: 0**

▼ Latest News and Announcements

[RESEA Orientation Video](#)

▼ Customer Relationship Management (CRM)

[Marketing Leads](#)  
Access a list of organizations that are potential customers.

[Contact List](#)  
Access a comprehensive list of all your contacts, leads and accounts.

[Work Items](#)  
Manage your tasks and assignments.

[Appointments](#)  
Schedule appointments and manage your calendar.

▼ My Calendar

April 2021

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

▼ Labor Market Services

[Labor Market Facts](#)  
Find answers to commonly asked questions about the local labor market.

[Area Profile](#)  
Access a summary of the labor market in a selected area.

[Industry Profile](#)  
Access labor market information on industries in a selected area.

[Occupational Profile](#)  
Access labor market information on occupations in a selected area.

[Educational Profile](#)  
Access labor market information on education programs in a selected area.

[More Labor Market Services](#)

▼ My Correspondence

0 Letters

0 Correspondence Templates

[Enter the Correspondence Center](#)

## 2. Under **Services for Workforce Staff**, select **Manage Individuals**.

### Quick Assist

Enter Search...



### Other Staff Services

- Labor Market Services >
- Assistance Center >
- Staff Online Resources
- Staff Online Courseware >
- Geographic Solutions Community Site

### My Staff Workspace

- My Staff Dashboard
- My Staff Resources >
- My Staff Account
- Directory of Services

### Services for Workforce Staff

- Manage Individuals >
- Manage Employers >
- Manage Résumés >
- Manage Job Orders >



The screenshot shows the CalJOBS website interface. At the top, there are two tabs: "My Staff Account" and "Directory of Services". Below the tabs is a search bar with the placeholder text "Enter Search..." and a magnifying glass icon. To the right of the search bar is a user profile icon. Below the search bar is a link that says "Configure Dashboard Widgets". The main content area is divided into three columns: "Services" (with sub-items: For Individuals, For Employers, Labor Market), "Mobile App" (with an icon of a hand pointing to a smartphone), and "Legal" (with sub-items: Privacy Statement, Terms of Use, Disclaimer, EEO). At the bottom of the page, there is a footer with the text "of California" and the "CalJOBS" logo, which includes the text "SM" and "americ".

### 3. Select Assist an Individual.

The image shows a screenshot of the OCgov.com website interface. On the left, a blue sidebar menu titled 'Manage Individuals' contains the following options: 'Create an Individual', 'One Case Note to Multiple Individuals', 'Assist an Individual', and 'WIOA Pre-Applications'. A yellow arrow points to the 'Assist an Individual' option. The main content area shows a dark-themed dashboard with a navigation bar at the top containing links for Home, Accessibility, My Dashboard, Sign Out, Services for Individuals, and Services for Employers. Below the navigation bar, there are buttons for 'My Staff Account' and 'Directory of Services'. A link for 'Configure Dashboard Widgets' is visible. At the bottom, there are four columns of links: 'Services' (For Individuals, For Employers, Labor Market), 'Mobile App' (with a smartphone icon), 'Legal' (Privacy Statement, Terms of Use, Disclaimer, EEO), and 'Resources' (Protect Yourself, Feedback, Assistance). The footer text reads 'Solutions, Inc. All rights reserved.'





4. Type in the **First Name** and **Last Name** of the individual you are referring, scroll down and click **Search**. Additional information may be entered (e.g. **SSN** or **Date of Birth**) if the individual has a common name.

### General Criteria

Individual Username:

Individual User ID:

- Starts with these #s
- Matches exactly

State ID Number:

First Name:

Last Name:

SSN (last 4 digits):

SSN (full number):  Example: 999999999

State Source ID:

State Activity ID:

Date of Birth:  (MM/DD/YYYY)

[ [More Search Options](#) ]



Search




Return to My Dashboard



5. Select **Summary** under **Results View**. There may be several names listed. Once you have found the correct individual, click on the hyperlink below **User Name**.



 For help click the information icon.

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

To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
<a href="#">OCTESTER123</a>	OC	Tester	██████		██████	12/04/2020		12/04/2020	<a href="#">Summary Tab</a> <a href="#">Case Notes Tab</a> <a href="#">Activities Tab</a> <a href="#">Programs Tab</a>	<input type="checkbox"/>

[Save New List](#)

1 Records found

SEARCH CRITERIA: First name begins with oc and Last name begins with tester

Records per page:

25

Go

[ [New search criteria](#) ] [ [Modify current criteria](#) ]



## 6. Expand the **Staff Profiles** folder by clicking on the “+” icon. Then expand **General Profile** and select **Activities**.




**This page is used to review your general contact information.**


If you make changes, click the *Save* button at the bottom of this page.

[ [Assist an individual](#) | [Staff Services](#) | [Individual Portfolio](#) ]

- My Individual Profiles**
- My Individual Plans**
- Staff Profiles**
  - General Profile**
    - [Summary](#)
    - [Case Notes](#)
    - [Activities](#)
    - [Documents \(Staff\)](#)
    - [Identity Issues](#)
  - Case Management Profile**
    - [Case Summary](#)
    - [Programs](#)
    - [Plan](#)
    - [Assessments](#)
  - Report Profile**
    - [Tracking](#)
    - [Statistics](#)
    - [Combined Assessment](#)
    - [Labor Exchange](#)



## 7. Scroll down and select **Staff Referrals to Providers**.

<a href="#">Summary</a>	<a href="#">Case Notes</a>	<b>Activities</b>	<a href="#">Documents (Staff)</a>	<a href="#">Identity Issues</a>
<a href="#">Internal Job Referrals</a> Select this option to review internal job order referrals for the selected individual.		<a href="#">Activity History / Service Plan</a> Select this option to review the selected Individual's Service Plan. This includes external job referrals.		
<a href="#">Employment History</a> Select this option to review the selected Individual's employment history.		<a href="#">Alternate Contacts</a> Select this option to review alternate contact information for the selected Individual.		
<a href="#">Event History</a> Select this option to review the Individual's Scancard Event History.			<a href="#">Staff Referrals to Providers</a> Select this option to create, edit and track referrals to local service providers for the selected Individual.	
<a href="#">Wage Information for Program Participant</a> View participations by program for this individual and check if quarterly wages have been recorded.			<a href="#">Local Status Tracking</a> Select this option to review the selected individual's local status tracking	
<a href="#">Tracking of Time</a> View recorded time spent with the individual				

## 8. Click on **Add Referral**.



**Currently Managing TESTER, OC**

**This page allows you to manage or create referrals to providers for the individual you are assisting.**

Make a selection from the Status dropdown list to filter the referrals displayed.

<b>Individual's Name:</b>	Tester, OC
<b>Phone Number:</b>	714-480-6539
<b>Address 1:</b>	123 S Grand Ave Santa Ana, CA 92705

Display only Referrals with a status of

To sort on any column, click a column title.

<u>LWIA/Region</u>	<u>Provider</u>	<u>Date</u>	<u>Status</u>	<u>Action</u>
26	Referral Test	04/26/2021	Open	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Provider Test	04/27/2021	Completed	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Referral Test	05/07/2021	Completed	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>

Page  Of 1 Rows per page:



Add Referral



9. In the **General information** section, complete the required information noted by red asterisks. Under **Office Location of Referral**, One-Stop Partners must select **\*OC Partner Office\*** and WIOA Title I Service Providers must select their corresponding **office location utilized in CalJOBS**. Scroll down to the next section once completed.

## General Information

---

User ID: 34620435

Referral Staff User: STAFF, OC (ORAOCSTAFF)



\* LWDB/Region:

26 - Orange County Community Services Agency, Special P ▼




\* Office Location of Referral:

263048 - \*OC Partner Office\* ▼



\* Date of Referral:

05/07/2021  [Today](#)



\* Program Making Referral:

Title I - Workforce Development (WIOA) ▼

Partner Program Tracking Number:



10. In the **Type of Referral** section, complete the required information noted by red asterisks. It is recommended to keep **Reason for Referral** simple for reporting purposes and add as much detail as possible under **Additional Information Regarding Referral** to assist receiving provider staff. Scroll down to the next section once completed.

## Type of Referral

---



\* Referral Type:

Other



\* Other Description:

Referral



\* Reason for Referral:

Enroll into WIOA




\* Additional Information Regarding Referral:

Individual is needing transportation assistance to commute to school and is looking to obtain a job in the medical field. Individual is graduating in Fall 2021.

[ [Spell Check](#) ]

11. In the **Provider Information** section, click on the **Search for Provider** hyperlink. Type in the provider's name and click **Submit**.

### Provider Information



**Referral To:**

\* **Provider Name:**

**Location:**

\* **Address 1:**

**Address 2:**

\* **City:**

\* **State:**

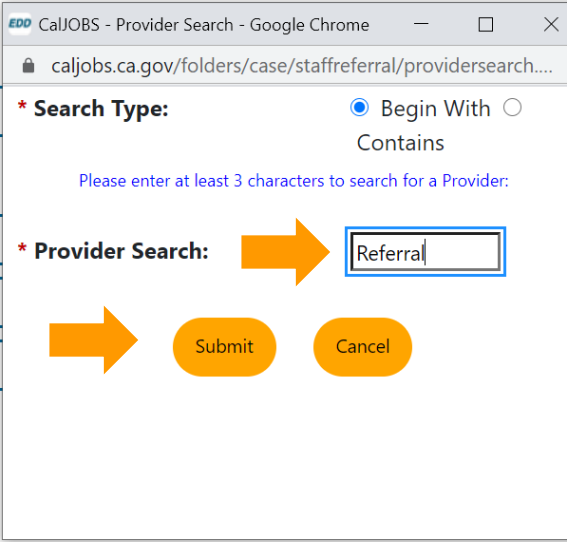
\* **Zip:(99999-9999)**

**Contact:**

\* **Contact Person:**

\* **Contact Phone:**  -  -  Ext.

[Search for Provider](#)

  
EDD CalJOBS - Provider Search - Google Chrome  
caljobs.ca.gov/folders/case/staffreferral/providersearch...  
\* **Search Type:**  Begin With  Contains  
Please enter at least 3 characters to search for a Provider:  
\* **Provider Search:**





12. Select the correct **Provider Name**. Once selected, their information will auto populate. If the provider has not been registered in CalJOBS, the required information may be manually input.

**Referral To:** [Search for Provider](#)

\* **Provider Name:**

**Location:**

\* **Address 1:**

**Address 2:**

\* **City:**

\* **State:**

\* **Zip:(99999-9999)**

**Contact:**

EDD CalJOBS - Provider Search - Google Chrome

caljobs.ca.gov/folders/case/staffreferral/providersearch...

Please click on the Provider you wish to select.

#	Provider Name	Region
8980	Referral Test	Orange County Community Services Agency, Special P
--	Provider Not Listed	

Search Again



## 13. Verify that all required fields are complete and input any missing information manually. Next, complete the **Contact** information.

Referral To:

[Search for Provider](#)

\* **Provider Name:**

Referral Test

**Location:**

None Selected ▼

\* **Address 1:**

1300 S. Grand Street

**Address 2:**


\* **City:**

Santa Ana

\* **State:**

California ▼

\* **Zip:(99999-9999)**

 **Contact:**

None Selected ▼


\* **Contact Person:**


\* **Contact Phone:**


-  -  Ext.

14. Click on the dropdown under **Contact** and select the individual you would like to send the referral to. Once selected, their information will auto populate. If a contact person is not provided, you may manually input the required information.

**VERY IMPORTANT!** – **Contact Email** is not a required field; however, this information must be entered to ensure the referral is received.

 **Contact:**

 **\*Contact Person:**

 **\*Contact Phone:**   
 -  -  Ext.

**Contact Email:**

**Contract:**

**Program/Service:**

---

15. Once all required fields have been completed, select **Save**. If you would like to keep a hard copy of the referral for your records, you may select **Save & Print**.

**Contact:**

**\* Contact Person:**

**\* Contact Phone:**  -  -  Ext.

**Contact Email:**

**Contract:**

**Program/Service:**



Save

Cancel



Save & Print

Return to Referral List



16. If you need to make any changes after submission, click on the **Edit** hyperlink. Changes made must be communicated with the receiving provider as CalJOBS only generates the initial referral email. The **Edit** hyperlink may also be used to locate the receiving provider's contact information to **confirm receipt of the referral** and **request the status of the referral** if contact is not received within **five (5) business days**.



Currently Managing TESTER, OC

This page allows you to manage or create referrals to providers for the individual you are assisting.



Make a selection from the Status dropdown list to filter the referrals displayed.

Individual's Name:	Tester, OC
Phone Number:	714-480-6539
Address 1:	123 S Grand Ave Santa Ana, CA 92705

Display only Referrals with a status of

To sort on any column, click a column title.

LWIA/Region	Provider	Date	Status	Action
26	Referral Test	04/26/2021	Open	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Provider Test	04/27/2021	Completed	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Referral Test	05/07/2021	Open	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>


 Page  Of 1 
 Rows per page:

[Add Referral](#)








# Instructions for Receiving a Referral




**IMPORTANT:** Check your email periodically as CalJOBS will send a system-generated email when a referral has been submitted to you. This email will show the **Staff Referring** and their **Contact Information**. In addition, the **Name** of individual being referred, **Reason for Referral**, and **Additional Information Regarding Referral**. Contact must be made with the individual within 48 hours or two (2) business days. A courtesy email must be sent to referring staff confirming receipt of referral and status of referral. The Referral Result must be updated in CalJOBS within five (5) business days of the referral being received.

Referral for Provider Services

 CaJOBS <brynn.hernandez@occr.ocgov.com>  
To Hernandez, Brynn  
Retention Policy Never Delete (Never)  
Expires Never  
Unsubscribe

 Reply
  Reply All
  Forward
 

Fri 5/7/2021 4:50 PM

 Get more add-ins

This email is sent as a courtesy from CalJOBS.

**Staff Referring:** OC STAFF  
**Contact Information:** (714) 480 - 6539  
**Referral Number:** 3014

**The following individual is being referred to you:**

**Name:** OC Tester  
**Reason for Referral:** Enroll into WIOA

**Specific Services:**

**Additional information regarding referral:** Individual is needing transportation assistance to commute to school and is looking to obtain a job in the medical field. Individual is graduating in Fall 2021.

I have counseled this individual and requested that he/she meet with you and provide additional information that your organization may require. I have also explained that acceptance by your organization is not guaranteed.

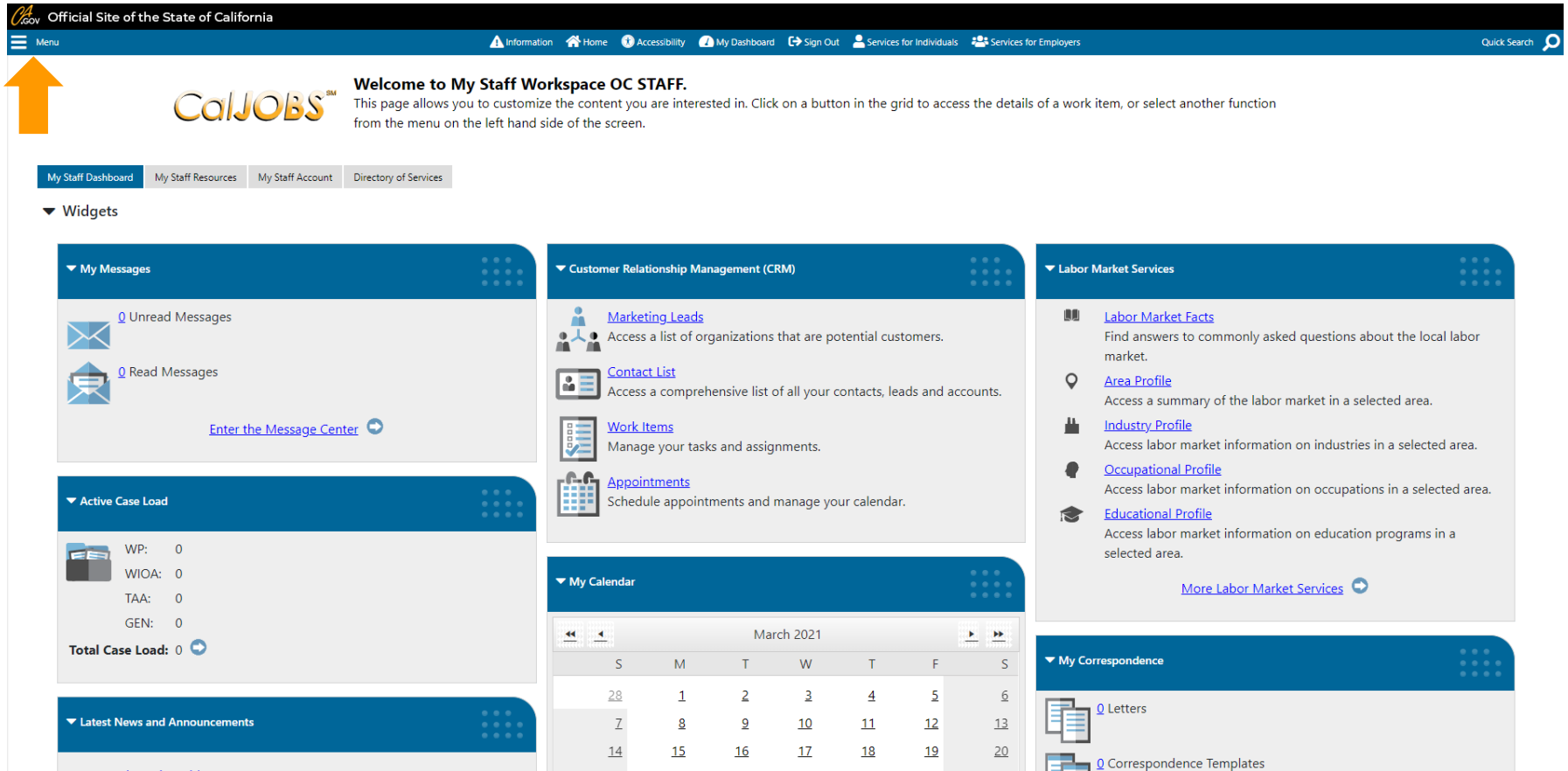
If you have any questions you may contact me at:

\*OC Partner Office\*

, CA  
N/A  
[brynn.hernandez@occr.ocgov.com](mailto:brynn.hernandez@occr.ocgov.com)



# 1. Sign into CalJOBS with your staff user account and click on **Menu**, located in the upper, left corner.



Official Site of the State of California

Menu Information Home Accessibility My Dashboard Sign Out Services for Individuals Services for Employers Quick Search

**CalJOBS** **Welcome to My Staff Workspace OC STAFF.**  
This page allows you to customize the content you are interested in. Click on a button in the grid to access the details of a work item, or select another function from the menu on the left hand side of the screen.

My Staff Dashboard My Staff Resources My Staff Account Directory of Services

▼ Widgets

▼ My Messages

0 Unread Messages

0 Read Messages

[Enter the Message Center](#)

▼ Active Case Load

WP: 0  
WIOA: 0  
TAA: 0  
GEN: 0

**Total Case Load: 0**

▼ Latest News and Announcements

▼ Customer Relationship Management (CRM)

[Marketing Leads](#)  
Access a list of organizations that are potential customers.

[Contact List](#)  
Access a comprehensive list of all your contacts, leads and accounts.

[Work Items](#)  
Manage your tasks and assignments.

[Appointments](#)  
Schedule appointments and manage your calendar.

▼ My Calendar

March 2021						
S	M	T	W	T	F	S
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

▼ Labor Market Services

[Labor Market Facts](#)  
Find answers to commonly asked questions about the local labor market.

[Area Profile](#)  
Access a summary of the labor market in a selected area.

[Industry Profile](#)  
Access labor market information on industries in a selected area.

[Occupational Profile](#)  
Access labor market information on occupations in a selected area.

[Educational Profile](#)  
Access labor market information on education programs in a selected area.

[More Labor Market Services](#)

▼ My Correspondence

0 Letters

0 Correspondence Templates



## 2. Under **Services for Workforce Staff**, select **Manage Individuals**.

### Quick Assist

Enter Search...



### Other Staff Services

- Labor Market Services >
- Assistance Center >
- Staff Online Resources
- Staff Online Courseware >
- Geographic Solutions Community Site

### My Staff Workspace

- My Staff Dashboard
- My Staff Resources >
- My Staff Account
- Directory of Services

### Services for Workforce Staff

- Manage Individuals <img alt="Yellow arrow pointing left" data-bbox="192 701 241 748"/> >
- Manage Employers >
- Manage Résumés >
- Manage Job Orders >

My Staff Account | Directory of Services

Configure Dashboard Widgets

**Services**  
For Individuals  
For Employers  
Labor Market

**Mobile App**

**Legal**  
Privacy Statement  
Terms of Use  
Disclaimer  
EEO

of California

CalJOBS<sup>SM</sup>

americ

### 3. Select **Assist an Individual**.

The image shows a screenshot of the OCgov.com website. On the left, a blue sidebar menu titled "Manage Individuals" is open, listing four options: "Create an Individual", "One Case Note to Multiple Individuals", "Assist an Individual", and "WIOA Pre-Applications". A yellow arrow points to the "Assist an Individual" option. The main content area shows a dark-themed dashboard with a top navigation bar containing links for Home, Accessibility, My Dashboard, Sign Out, Services for Individuals, and Services for Employers. Below the navigation bar, there are buttons for "My Staff Account" and "Directory of Services". A link for "Configure Dashboard Widgets" is visible. At the bottom, there are four columns of links: "Services" (For Individuals, For Employers, Labor Market), "Mobile App" (with a smartphone icon), "Legal" (Privacy Statement, Terms of Use, Disclaimer, EEO), and "Resources" (Protect Yourself, Feedback, Assistance). The footer includes the text "Solutions, Inc. All rights reserved."

## 4. Type in **First Name** and **Last Name** of the individual being referred, scroll down and click **Search**.

### General Criteria

Individual Username:

Individual User ID:

- Starts with these #s  
 Matches exactly

State ID Number:

First Name:



Last Name:

SSN (last 4 digits):

SSN (full number):  Example: 999999999

State Source ID:

State Activity ID:

Date of Birth:  (MM/DD/YYYY)

[ [More Search Options](#) ]

Search



Return to My Dashboard

Settings

Services

Mobile App

Legal


Resources

CaJOBS



## 5. Select **Summary** under **Results View**. There may be several names listed. Once you have found the correct individual, click on the hyperlink below **User Name**.



 For help click the information icon.

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

To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
<a href="#">OCTESTER123</a>	OC	Tester	██████		██████	12/04/2020		12/04/2020	<a href="#">Summary Tab</a> <a href="#">Case Notes Tab</a> <a href="#">Activities Tab</a> <a href="#">Programs Tab</a>	<input type="checkbox"/>

[Save New List](#)

1 Records found

SEARCH CRITERIA: First name begins with oc and Last name begins with tester

Records per page: 25



[ [New search criteria](#) ] [ [Modify current criteria](#) ]



## 6. Expand the **Staff Profiles** folder by clicking on the “+” icon. Then expand **General Profile** and select **Activities**.



**This page is used to review your general contact information.**


If you make changes, click the *Save* button at the bottom of this page.

[ [Assist an individual](#) | [Staff Services](#) | [Individual Portfolio](#) ]

The screenshot displays a navigation menu with the following items:

- My Individual Profiles** (with a plus icon)
- My Individual Plans** (with a plus icon)
- Staff Profiles** (with a minus icon)
- General Profile** (with a minus icon)
  - Summary
  - Case Notes
  - Activities** (highlighted by an orange arrow)
  - Documents (Staff)
  - Identity Issues
- Case Management Profile** (with a minus icon)
  - Case Summary
  - Programs
  - Plan
  - Assessments
- Report Profile** (with a minus icon)
  - Tracking
  - Statistics
  - Combined Assessment
  - Labor Exchange

## 7. Scroll down and select **Staff Referrals to Providers**.

<a href="#">Summary</a>	<a href="#">Case Notes</a>	<b>Activities</b>	<a href="#">Documents (Staff)</a>	<a href="#">Identity Issues</a>
<p><a href="#">Internal Job Referrals</a> Select this option to review internal job order referrals for the selected individual.</p>				
<p><a href="#">Employment History</a> Select this option to review the selected Individual's employment history.</p>				
<p><a href="#">Event History</a> Select this option to review the Individual's Scancard Event History.</p>				
<p><a href="#">Wage Information for Program Participant</a> View participations by program for this individual and check if quarterly wages have been recorded.</p>				
<p><a href="#">Tracking of Time</a> View recorded time spent with the individual</p>				
			<p><a href="#">Activity History / Service Plan</a> Select this option to review the selected Individual's Service Plan. This includes external job referrals.</p>	
			<p><a href="#">Alternate Contacts</a> Select this option to review alternate contact information for the selected Individual.</p>	
			<p><a href="#">Staff Referrals to Providers</a> Select this option to create, edit and track referrals to local service providers for the selected Individual.</p>	
			<p><a href="#">Local Status Tracking</a> Select this option to review the selected individual's local status tracking</p>	



## 8. Locate the appropriate referral based on the **Provider, Date, and Status (Open)**. Under **Action**, click on **Edit**.



Currently Managing **TESTER, OC**

This page allows you to manage or create referrals to providers for the individual you are assisting.

Make a selection from the Status dropdown list to filter the referrals displayed.

<b>Individual's Name:</b>	Tester, OC
<b>Phone Number:</b>	714-480-6539
<b>Address 1:</b>	123 S Grand Ave Santa Ana, CA 92705

Display only Referrals with a status of

To sort on any column, click a column title.

LWIA/Region	Provider	Date	Status	Action
26	Referral Test	04/26/2021	Open	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Provider Test	04/27/2021	Completed	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Referral Test	05/07/2021	Open	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>



Page  Of 1 Rows per page:

Add Referral



## 9. Scroll to the last section titled **Referral Result** and complete the appropriate information. Select **Save** or **Save & Print**.

### Referral Result



**Individual attended session at referral provider:**  Yes  No

**Comments:**

Individual attended WIOA orientation and will be assigned a case manager.

[\[ Spell Check \]](#)



**Status:**

None Selected ▾  
None Selected  
Referred- Enrolled  
Referred-Did Not Enroll  
Unsuccessful Referral

**Last Edited Date:**

**Last Edited By:**



Save

Cancel

Delete

Save & Print





# 10. The **Status** of the referral will update to **Completed** after the Referral Result has been entered and saved.



**Currently Managing TESTER, OC**  
**This page allows you to manage or create referrals to providers for the individual you are assisting.**

Make a selection from the Status dropdown list to filter the referrals displayed.

Individual's Name: Tester, OC  
 Phone Number: 714-480-6539  
 Address 1: 123 S Grand Ave Santa Ana, CA 92705

Display only Referrals with a status of



To sort on any column, click a column title.

LWIA/Region	Provider	Date	Status	Action
26	Referral Test	04/26/2021	Open	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Provider Test	04/27/2021	Completed	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>
26	Referral Test	05/07/2021	Completed	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Inactivate</a>

Page  Of 1 Rows per page:

Add Referral



# THANK YOU

County of Orange



# How to Run Staff Referrals Reports in CalJOBS

Presented By:  
OCCS Workforce & Economic Development Division



READY S.E.T. OC  
WIOA Youth Program

America's **JobCenter**  
of California™

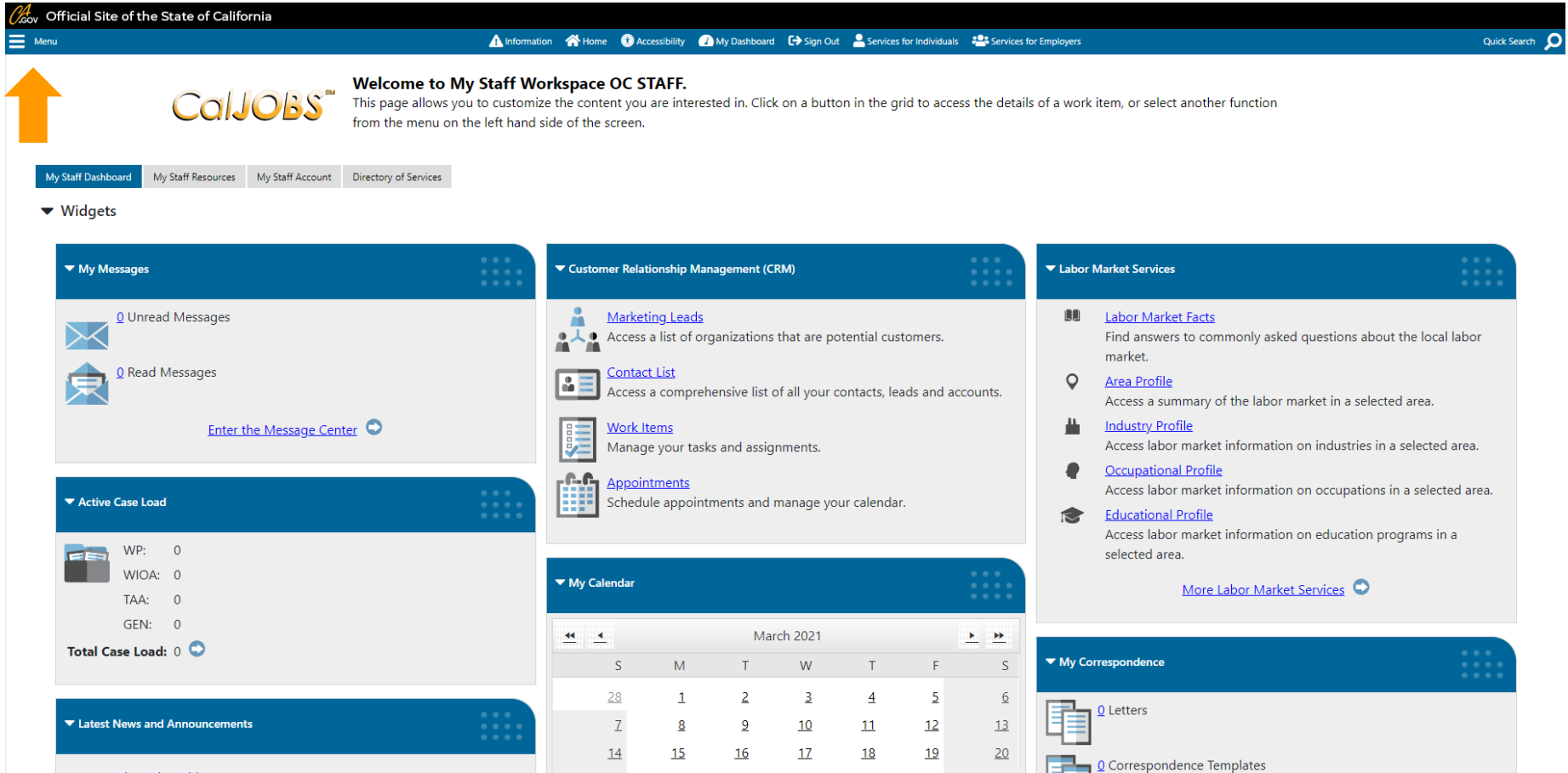
OC Community Services



County of Orange



# 1. Sign into CalJOBS with your staff user account and click on **Menu**, located in the upper, left corner.



**Official Site of the State of California**

Menu Information Home Accessibility My Dashboard Sign Out Services for Individuals Services for Employers Quick Search

**CalJOBS** **Welcome to My Staff Workspace OC STAFF.**  
This page allows you to customize the content you are interested in. Click on a button in the grid to access the details of a work item, or select another function from the menu on the left hand side of the screen.

My Staff Dashboard My Staff Resources My Staff Account Directory of Services

▼ Widgets

▼ My Messages

0 Unread Messages

0 Read Messages

[Enter the Message Center](#)

▼ Active Case Load

WP: 0  
WIOA: 0  
TAA: 0  
GEN: 0

**Total Case Load: 0**

▼ Latest News and Announcements

▼ Customer Relationship Management (CRM)

[Marketing Leads](#)  
Access a list of organizations that are potential customers.

[Contact List](#)  
Access a comprehensive list of all your contacts, leads and accounts.

[Work Items](#)  
Manage your tasks and assignments.

[Appointments](#)  
Schedule appointments and manage your calendar.

▼ My Calendar

March 2021

S	M	T	W	T	F	S
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

▼ Labor Market Services

[Labor Market Facts](#)  
Find answers to commonly asked questions about the local labor market.

[Area Profile](#)  
Access a summary of the labor market in a selected area.

[Industry Profile](#)  
Access labor market information on industries in a selected area.

[Occupational Profile](#)  
Access labor market information on occupations in a selected area.

[Educational Profile](#)  
Access labor market information on education programs in a selected area.

[More Labor Market Services](#)

▼ My Correspondence

0 Letters

0 Correspondence Templates

## 2. Under the Reports section, select Detailed Reports.

- manage job orders >
- Manage Labor Exchange >
- Manage Activities >
- Manage Providers >
- Manage Case Assignment >
- Manage Profiling >
- Manage Funds >
- Manage Scan Card >
- Manage WARN Notifications >
- Manage Visitors >
- Manage Follow-Up >
- Manage Surveys >
- Manage Online Forms >
- ▼ **Reports**
- My Reports
- Summary Reports
- Detailed Reports ←
- Custom Reports
- SQL Query Tools
- Federal Reports
- Community College Reports
- Live Data >
- ▼ **Customer Relationship Management**
- Create a Marketing Lead
- Contacts List
- Marketing Leads
- Outreach Campaign(s)
- Work items
- Appointments

Information Home Accessibility My Dashboard Sign Out Services for Individuals Services for Employers Quick Search

My Staff Account Directory of Services

My Calendar

March 2021

S	M	T	W	T	F	S
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

My Messages

0 Unread Messages

1 Read Messages

Enter the Message Center

Staff Productivity

Staff Productivity by Program

2/9 to 3/11

Program: GEN, Trade, WIOA, WP

Days: 30

Need help or more information

Assistance Center

Learning Center



### 3. Under the **Case Management Reports** section, select **Staff Referrals**.

Menu Home Accessibility My Dashboard Sign Out Services for Individuals Services for Employers Quick Search

## CalJOBS™ Detailed Reports

### Attendance Reports

[Event Scheduler](#)  
Display Event Scheduler Reports

[Greeter](#)  
Display VOSGreeter® Reports

[Scan Card](#)  
Display Scan Card Reports

### Case Management Reports

[Case Load](#)  
Display Case Load Reports

[Case Load - Non-WIOA](#)  
Display Case Load - Non-WIOA Reports

[Case Load - WIOA](#)  
Display Case Load - WIOA Reports

[Documentation](#)  
Display Documentation Reports

[Payment](#)  
Display Payment Reports

[Predictive](#)  
Display Predictive Reports

[Staff Referrals](#)  
Display Staff Referrals Reports



## 4. Select the appropriate report type based on your needs.

The screenshot shows the 'Staff Referrals Reports' page in the CalJOBS system. The page title is 'Staff Referrals Reports' and the logo 'CalJOBS™' is visible. The navigation bar includes links for Home, Accessibility, My Dashboard, Sign Out, Services for Individuals, and Services for Employers. The main content area is titled 'Staff Referrals:' and includes an 'Advanced' filter and two menu options: 'List' and 'By Referral Type'. The 'By Referral Type' menu is expanded, showing 'By Provider' and 'By Staff'. A central button labeled 'Return to Manage Reports' is present. Below the menu, there are links for 'Services' and 'Page Preferences'. The footer contains a list of legal links (Privacy Statement, Disclaimer, Terms of Use, Accessibility, Recommended Settings, EEO, Protect Yourself, About this Site, Contact Us), a 'Home' link, a 'Sign Out' link, and copyright information: 'Copyright © 1998-2021 Geographic Solutions. All rights reserved. 20.0'. Four callout boxes with orange borders provide descriptions for the report options: 'List' (summary information), 'By Referral Type' (information organized by type), 'By Provider' (information organized by provider), and 'By Staff' (information organized by staff member).

**Staff Referrals Reports**

**Staff Referrals:**

- Advanced
- List
- By Referral Type
  - By Provider
  - By Staff

Return to Manage Reports

Services Page Preferences

Privacy Statement | Disclaimer | Terms of Use | Accessibility | Recommended Settings | EEO | Protect Yourself | About this Site | Contact Us

Home Sign Out

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20.0

**This report displays summary information entered into Staff Referral to Providers.**

**This report displays referral information organized by the provider of the referral.**

**This report displays referral information organized by type of referral.**

**This report displays referral information organized by the staff member who created the referral.**



## 5. Completing office location and provider information is optional, update the **Date Range** information accordingly and select **Run Report**.

Official Site of the State of California

CalJOBS™ Staff Referrals - List

**Selection Criteria**

**Location Information**

Region/LWDB Status:  Active  Inactive  All

Region/LWDB:

Office Status:  Active  Inactive  All

Office Location:   
04217 Garden Grove (WSB)  
ORA - OCWIB

**Referral Information**

Program:

Providers:

Referral Status:

Program Service:

Staff Status:  Active  Inactive  All

Search By:  Last Name  First Name  Username

Staff:

**Date**

Date Ranges:

From:  (MM/DD/YYYY)

To:  (MM/DD/YYYY)

[Reset Dates](#)

[Run Report](#)

[Save to My Reports](#)

[Select Another Staff Referrals Report](#)



6. The report will generate associated referrals based on the criteria selected. The report can be opened and saved as XML, CSV, PDF, Excel, or Text File by selecting the **Save** (floppy disk) icon. The report can also be printed by selecting the **Print** icon.

\*Example shown is the Staff Referrals Report – List with a 30 day date range and a specific provider selected.



Staff Email Search

1 of 1 100%

**Staff Referrals Reports List**

- Lwia: Orange County Community Services Agency, Special P
- Provider: Referral Test - 8233628/6
- Date Range: 4/15/2021 - 5/14/2021
- Report Run Time: 5/14/2021 9:58:21 AM

Individual User ID	Individual's name	Individual State ID	Referral Date	Referral Type	Staff Referred	Provider/ Partner	Provider Contact Name	Referral For	Referral Outcome	Special Program	Partner Program Tracking Number
[REDACTED]	Tester, OC	[REDACTED]	05/07/2021		STAFF, OC	Referral Test	Drynn Hernandez	Enroll into WIOA	Referred Enrolled		
[REDACTED]	Tester, OC	[REDACTED]	04/28/2021		STAFF, OC	Referral Test	Zittalic Domond	Enroll into WIOA for support	NA		

Total Rows: 2

[Reset Search Criteria / Update Search Criteria](#)

Select Another Staff Referrals Report



# THANK YOU

County of Orange

