SAN JOAQUIN COUNTY WORKNET
EMPLOYMENT AND ECONOMIC DEVELOPMENT DEPARTMENT
POLICIES AND PROCEDURES DIRECTIVE

DIRECTIVE NO.	EFFECTIVE DATE	APPLICABILITY	PAGE
25-16	January 1, 2026	CMD	1 of 11

SUBJECT:	**FOLLOW-UP**

I.   PURPOSE

The purpose of this policy is to provide guidance on the delivery of Follow-Up services to participants of Workforce Innovation and Opportunity Act (WIOA), NFJP, and non-WIOA programs after their exit. Follow-up is treated as an extension of participant engagement and, when appropriate, delivery of services designed to support job retention, career advancement, continued learning, and long-term success.

II.   GENERAL INFORMATION

In accordance with WIOA, Follow-up services must be needs-based, participant-centered, and include more than documentation efforts. They are not used to delay or affect performance exit dates, but rather to support sustainable employment outcomes. Adult and Dislocated Worker participants who enter unsubsidized employment must be offered follow-up services for up to 12 months after program exit. Youth participants must be provided with follow-up services for a minimum of 12 months after program exit, unless they decline or cannot be contacted.

This directive supersedes PPD 23-11 Follow Up, dated February 26, 2024.

References

- WIOA (Public Law 113-128) Sections 129 (c)(2)(I) and 134(c)(2)(A)(xiii)
- Title 20 Code of Federal Regulations (CFR) Sections 680.150, 680.900, and 681.580
- TEGL 19-16 Guidance on Services provided through the Adult and Dislocated Worker Programs 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."
- [TEGL 21-16](#) Third Workforce Innovation and Opportunity Act (WIOA) Title I Youth Formula Program Guidance
- [TEGL 10-16, Change 3](#) Performance Accountability Guidance for WIOA Core Programs
- [WSD17-07](#) WIOA Youth Program Requirements
- [WSD22-15](#) WIOA Data Validation Source Documentation
- [WSD24-05](#) CalJOBS Activity Codes

III. POLICY

It is the policy of the San Joaquin County Employment and Economic Development Department (EEDD) that Follow-Up services are a required and/or allowable component of the Workforce Innovation and Opportunity Act (WIOA) service delivery system, depending on program, and are provided after program exit to support employment retention, postsecondary education persistence, career advancement, wage progression, and the resolution of barriers impacting successful outcomes. Follow-up services are planned, individualized, and programmatic activities provided based on documented need and professional judgment. Follow-up services are a required program element for WIOA Youth and an allowable Career Service for WIOA Adults and Dislocated Workers. Only activities that meet the definition of a service may be recorded as follow-up services and must be fully and accurately documented in CalJOBS as services, consistent with WIOA performance accountability and data-validation requirements (Attachment 1).

Follow-up contacts are distinct from follow-up services and consist of communications and outcome-verification activities conducted after exit to maintain participant engagement, confirm employment or education status, and support performance reporting. **All WIOA participants are subject to follow-up contact activities after exit for purposes of performance accountability and outcome reporting** regardless of whether follow-up services are provided. Follow-up contacts may include successful contacts as well as documented attempts to engage the participant and may result in referrals or the identification of a need for follow-up services; however, follow-up contacts alone do not satisfy follow-up service requirements. All follow-up contacts, referrals, and engagement attempts must be individualized, accurately and timely recorded in CalJOBS using Case Notes and the Follow-Up ribbon, and maintained in accordance with federal, state, and local monitoring, audit, and data-validation standards (Attachment 1).

This policy applies not only to WIOA programs but also to the National Farmworker Jobs Program (NFJP), which provides workforce services to eligible migrant and seasonal farmworkers; and non-WIOA programs and grants that utilize CalJOBS for case management, reporting, or follow-up tracking, including state or locally

funded employment, training, or supportive service initiatives. Procedural requirements for NFJP and non-WIOA programs may be adapted as necessary to align with grant-specific rules, provided the core principles of participant-centered follow-up, documentation, and accountability are maintained. Follow-up for these programs must be conducted in a manner consistent with the principles outlined in Sections II–IV of this policy.

IV.   PROCEDURE

Staff are expected to carry out follow-up activities in a participant-centered, needs-based manner. When appropriate, follow-up services may be provided to support continued employment, education, or training and to address emerging challenges. Staff should make consistent and timely follow-up contact attempts using the participant's preferred communication methods and should document all follow-up activities in CalJOBS. These actions are essential to promote successful post-exit outcomes, maintain accurate performance data, and ensure compliance with WIOA and agency requirements.

A. Participant Preparation and Consent

Staff must explain the purpose of follow-up services during the Initial Assessment and reinforce this information throughout program participation. This explanation must include the requirement for a four-quarter follow-up period after exit and the importance of collecting accurate data. The four-quarter follow-up period refers to required follow-up contact and outcome reporting activities for performance accountability and does not require the provision of follow-up services for Adult or Dislocated Worker participants unless a documented need is identified. Staff are responsible for obtaining and documenting participant consent, including preferred communication methods, and for encouraging participants to provide and update alternate contacts.

B. Employment Transition Meeting Prior to Closure

When a participant obtains employment, staff must conduct an Employment Transition Meeting (ETM) (Attachment 2) prior to case closure to ensure accurate documentation and a smooth transition into follow-up. During the ETM, staff must verify employment information including start date, employer name, job title, wage (if voluntarily provided), schedule, and any anticipated job retention challenges. Staff must explain the purpose of follow-up services, the four-quarter follow-up requirement after exit, and the availability of services during this period, noting that supportive services may continue during follow-up for Youth participants in accordance with TEGL 21-16 and 20 CFR § 681.580(b), but for Adult and Dislocated Worker participants, supportive services are not permitted during follow-up after exit, consistent with

TEGL 19-16, TEGL 10-16, and 20 CFR § 680.910, which limit supportive services to participants actively engaged in career or training activities.

Staff must confirm and update the participant's preferred communication methods, best times to contact, and at least one alternate contact person, including the person's name, relationship, and contact information. Any remaining needs that must be addressed prior to exit, such as job retention planning, referrals, or completion of pending services, must be identified and completed before case closure. All information gathered during the ETM must be documented in CalJOBS with a detailed Case Note. If the participant declines or cannot be reached, staff must document all attempts in a case note and proceed with closure consistent program policy.

C. Mandatory 30-Day Check-Ins

Within 30 days of program both closure and exit, case managers must make direct contact with each participant to assess employment or education status, identify early job challenges, and determine the need for referrals. For youth participants, the 30-day check-in meetings must also include verification of postsecondary education or training enrollment, when applicable, in alignment with WIOA Youth follow-up requirements. Education verification is not required for Adult or Dislocated Worker participants. Staff must provide appropriate coaching, problem-solving support, or resources as needed. The 30-day check-in is a required follow-up contact. Any coaching, problem-solving support, or referrals provided during this interaction must be based on identified need and documented as follow-up services only when service criteria are met. All 30-day check-ins must be documented in CalJOBS through Case Notes and, where applicable, by completing the follow-up fields in the Follow-Up ribbon. <u>These 30-day check-ins do not replace the first quarter follow-up requirements.</u>

D. Follow-Up Timing and Contact Procedures

Quarterly Follow-Up Requirements

Follow-ups must occur each quarter for four quarters after program exit. When no successful contact is made, staff must make a minimum of three contact attempts per quarter, ensuring that attempts occur on different days, at different times, and use multiple communication methods.

Multi-Modal Contact Requirements

Consistent with EDD guidance, contact attempts must include multiple communication methods, with a minimum of phone calls, text messages, and emails. Staff may also use mailed letters, surveys, or alternate contacts as

needed. Staff must prioritize and respect each participant's preferred method of communication, as documented during Initial Assessment or other follow-up interactions (Attachment 3). Two methods other than phone calls, such as text messages, emails, or if earlier attempts are unsuccessful, mailed letters or surveys must be used during outreach. This multi-modal approach ensures participants receive timely and relevant support in a way that aligns with their communication preferences.

Use of a Calendar-Driven Workflow

To maintain timeliness and prevent backlog, staff must distribute quarterly follow-up attempts evenly across the follow-up period. Staff should plan follow-up attempts based on the participant's official CalJOBS exit date and ensure that each quarter's follow-up is initiated and completed within the correct reporting window.

E. CalJOBS Follow-Up Ribbon Requirements

Staff must complete follow-up forms in the participant's Title I application under the Follow-Up ribbon by selecting the appropriate follow-up quarter and updating alternate contact information as needed. Each contact attempt must be recorded in the Contact Attempts section, including the Contact Date, Time of Day, Type of Contact, and a Description if applicable. After three unsuccessful attempts, staff must click the "Multiple attempts with no success" button, confirm closure of the follow-up quarter, and exit the Follow-Up screen; the system will automatically mark the quarter as Completed – Cannot Locate.

If a successful contact is made, staff must complete the Follow-Up Employment Information section, answering all required questions marked with a red asterisk. If the participant is employed, staff must click "Add Employer" and complete the Employer Information, Job Information, Non-Traditional Employment, and Training-Related Employment fields, collecting required source documentation as indicated by WSD22-15. The Follow-Up Education Information section must also be completed, and if anything other than "No Placement" is reported, the Date of Education. The education-related follow-up fields primarily apply to Youth program participants. Placement must be entered along with any necessary documentation.

Staff must complete all required fields in the Current Status at Follow-Up and Staff Information sections, with Status at Follow-Up required whenever a service or outcome is recorded. Once saved or closed after unsuccessful attempts, CalJOBS will automatically update the Date Complete and Status for that quarter.

F. Core Follow-Up Services

Follow-up services should address the diverse needs of participants as they transition beyond program exit and must be tailored to each individual's goals. These services may include career coaching, job retention support, performance check-ins, goal setting, and guidance for career advancement or internal promotions. Staff may assist participants with workplace challenges, conflict resolution, time management, and adapting to workplace culture. All follow-up services described must be linked to the appropriate follow-up activity code in CalJOBS. Staff should note that the available codes differ between Youth and Adult/Dislocated Worker programs.

Referrals for additional supports may be provided as needed, including housing, utilities, transportation, food assistance, public benefits, or mental health and counseling services. Educational and skills development support is also a key component, including connections to community colleges, training programs, apprenticeships, or programs for license or credential attainment.

Follow-up may include motivational check-ins, encouragement, stress management support, and connections to peer or alumni networks. Staff should also assess participants for potential re-enrollment in programs if employment ends or for enrollment with other partner programs that provide additional education or vocational services. To be re-enrolled, a participant must meet eligibility requirements; re-enrollment is not automatic and must be based on a new, eligible need.

All follow-up services must be fully documented to reflect the participant's post-exit goals and individual needs, in accordance with performance and data validation requirements.

G. Documentation Requirements

All follow-up contact attempts and services must be documented in the CalJOBS Follow-Up ribbon for outcome reporting and in Case Notes to provide narrative detail and support data validation. Required employment verification (or education for Youth participants) documentation must be completed within 30 days of the scheduled quarterly due date. (Refer to WSD22-15, Attachment 1 for a complete WIOA Source Documentation List.)

Follow-up services may be discontinued prior to completion of the full 12-month follow-up period when continued outreach is no longer appropriate or feasible. Staff shall discontinue offering follow-up services under the following circumstances, even if additional follow-up quarters remain:

1. **Unable to Reach Participant**

    The participant cannot be contacted after reasonable outreach efforts that include use of the participant's previously indicated preferred methods of communication, as documented in CalJOBS. Outreach must include a minimum of three (3) documented contact attempts during the follow-up quarter, made on different days, at different times, and using multiple communication methods. Examples include, but are not limited to, returned mail via the United States Postal Service (USPS), disconnected or invalid phone numbers, and undeliverable email addresses.

2. **Participant Declines or Refuses Follow-Up**

    The participant explicitly declines follow-up services, requests no further contact, or refuses to provide required follow-up information such as employment status, wages, or education outcomes.

3. **Participant Relocation**

    The participant has relocated out of state and indicates no intention of returning, making continued follow-up impracticable.

Discontinuation of follow-up services or outreach does not eliminate the requirement to complete required performance reporting fields or document contact attempts for the applicable follow-up quarter. When follow-up is discontinued under any of the above circumstances, the WIOA case manager must create a detailed Case Note in CalJOBS documenting the reason follow-up was discontinued, including the date of the participant's decline or last successful contact, a summary of all outreach attempts made, and any relevant participant statements.

Case notes must use the following subject line format to clearly identify the affected follow-up period:

"*Discontinued Follow-Up – [1st / 2nd / 3rd / 4th] Quarter After Exit.***"**

Staff must also ensure that all required entries in the CalJOBS Follow-Up Ribbon are completed accurately for the applicable quarter, including documentation of contact attempts and selection of the appropriate system disposition (e.g., *Completed – Cannot Locate*), in accordance with data validation and performance accountability requirements.

H. Special Projects and Grants

Programs with grant-specific follow-up requirements must adhere to those requirements in addition to this policy. Grant instructions supersede standard WIOA follow-up procedures where conflicts exist.

I. Program-Specific Guidance

1. Adult and Dislocated Worker Programs

Follow-up services must be made available to participants for up to 12 months after exit. These services may include career coaching and job retention planning, verification of employment with the employer or participant, assistance in obtaining higher wages or improved employment, support with conflict resolution or time management, referrals to community-based resources, access to job fairs or additional training programs, and assessment for potential re-enrollment if employment ends. (Note: a participant must complete a new application for services and meet all eligibility requirements before re-enrollment can occur.

Supportive services may not be provided to Adult and Dislocated Worker participants after exit under any circumstances, consistent with 20 CFR § 680.910, TEGL 19-16, and TEGL 10-16. Staff may provide referrals to partner agencies or community resources to assist participants who need additional support.

2. Youth Program Follow-Up

Youth participants must receive follow-up services for a minimum of 12 months after program exit. Follow-up must involve more than attempts to collect documentation and must be tailored to each youth's individual needs. These services may include ongoing mentoring and coaching, supportive services, labor market information and job leads, assistance with college readiness and financial aid applications, referrals to training programs or apprenticeships, financial literacy education, crisis support and motivational check-ins, and opportunities for re-engagement in additional services or programs.

J. Integration of EDD Follow-Up Guide Card Data Elements

This policy incorporates the data element associations listed in the EDD Follow-Up Guide Card (Attachment 1). Staff are responsible for ensuring that all follow-up forms are completed accurately, as each response directly corresponds to federally reported performance data under WIOA.

K. NFJP and Non-WIOA Program Requirements

Follow-up services for National Farmworker Jobs Program (NFJP) participants and for participants enrolled in non-WIOA programs must mirror the standards of high-quality, participant-centered service delivery established in this policy while meeting program-specific federal, state, and grant requirements. Although NFJP and non-WIOA programs may not be bound by WIOA performance accountability reporting, they are required to adhere to the follow-up expectations outlined below to ensure continuity of service, promote long-term participant success, and maintain consistency across all EEDD.

1. NFJP Program Follow-Up Requirements

NFJP follow-up services must be provided in accordance with U.S. Department of Labor (DOL) NFJP regulations, guidance, and grant instructions. Follow-up is required for all NFJP participants who have obtained employment, attained a credential, or completed training services. NFJP follow-up may include:

- Employment verification and assessment of job retention
- Coaching, problem-solving, and addressing workplace or post-training challenges
- Referrals to supportive services or community resources that align with NFJP allowable activities
- Assistance with career advancement, additional training, or skill enhancement
- Continued support to mitigate barriers to sustainable employment, including housing, transportation, childcare, or other needs permissible under NFJP grant rules.

NFJP follow-up activities, contact attempts, and documentation requirements must be recorded in CalJOBS and in the designated NFJP case management system identified by the grant. When CalJOBS is used, staff must enter follow-up notes, employment updates, and service provision using the appropriate activity codes or case notes consistent with NFJP reporting requirements.

2. Non-WIOA Program Follow-Up Requirements

Programs funded outside of WIOA (e.g., local grants, foundation-funded initiatives, state-funded special projects, pilot initiatives, or contract-based programs) must follow the follow-up expectations outlined in this policy unless prohibited or superseded by program-specific guidance.
Follow-up for non-WIOA programs should:

- Promote job retention, training completion, or continued education
- Address barriers to employment or completion of program objectives
- Provide coaching, referrals, and guidance consistent with the scope of the funding source
- Support transitions to employment, postsecondary education, apprenticeships, or other career pathways

Program managers must identify whether the funding source requires its own follow-up intervals, documentation methods, reporting format, or outcome verification standards. When differences exist between this policy and program-specific requirements, the most stringent standard must be applied, unless program rules explicitly prohibit it. For non-WIOA programs, the most stringent standard applies only to the extent permitted by the funding source and program rules.

If non-WIOA programs do not utilize CalJOBS for case management, staff must use the designated data system, spreadsheets, or reporting tools established for the program. Regardless of system, all follow-up contacts, verification, services, and attempts must be captured with the same level of detail, timeliness, and accuracy required under WIOA follow-up standards.

3. **Alignment of Follow-Up Standards Across Programs**

To ensure consistency and service quality across all AGENCY programs:

- Staff must use a participant-centered and needs-based approach for NFJP and non-WIOA program follow-up in alignment with Sections III–F of this policy.
- Quarterly contact expectations, multi-modal outreach, and documentation standards (Sections C and F) must be used unless program rules specify a different schedule or method.
- All programs must maintain clear documentation of follow-up activity, barriers resolved, services provided, and participant outcomes to support reporting, monitoring, and evaluation.

4. **Program-Specific Exceptions and Grant Requirements**

Where NFJP or non-WIOA grants specify follow-up intervals, reporting formats, or required outcome measures that differ from this policy:

- Those grant requirements take precedence.
- Staff must review and follow the grant agreement, DOL/State guidance, or contract language applicable to the program.

- Any exceptions must be documented in the participant's case file and communicated to program leadership for monitoring and compliance purposes.
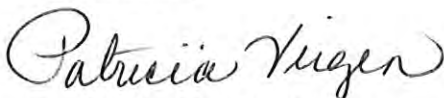
V.   QUESTIONS REGARDING THIS DIRECTIVE

May be referred to the Executive Director of EEDD via Managers or designee.

VI.   UPDATE RESPONSIBILITY

The Executive Director of EEDD and/or designee shall be responsible for updating this directive, as appropriate.

VII.   APPROVED

Patricia Virgen

PATRICIA VIRGEN
EXECUTIVE DIRECTOR

PV:jl

Attachment 1: EDD Follow-Up Guide Card
Attachment 2: Employment Transition Meeting Form
Attachment 3: Preferred Method of Communication Form

Follow-Ups

What is Follow-up?

Follow-up is the four-quarter period of time that follows a participant's exit from the program. The follow-up period of time can be used to provide follow-up services to participants and/or collect employment and/or education outcome data on the participant.

Follow-up services are critical services provided to help ensure the individual is successful in employment and/or postsecondary education and training. 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. For more information on follow-up services, see WSD24-05, *CalJOBS Activity Codes Directive*.

Follow-up can also be used to collect employment and/or education outcome data on participants. Outcome data is an important component in calculating the WIOA primary indicators of performance. For more information on the WIOA primary indicators of performance, see WSD24-07, *Performance Guidance*. The remainder of this guide card will focus on the collection of this data in the CalJOBS system.
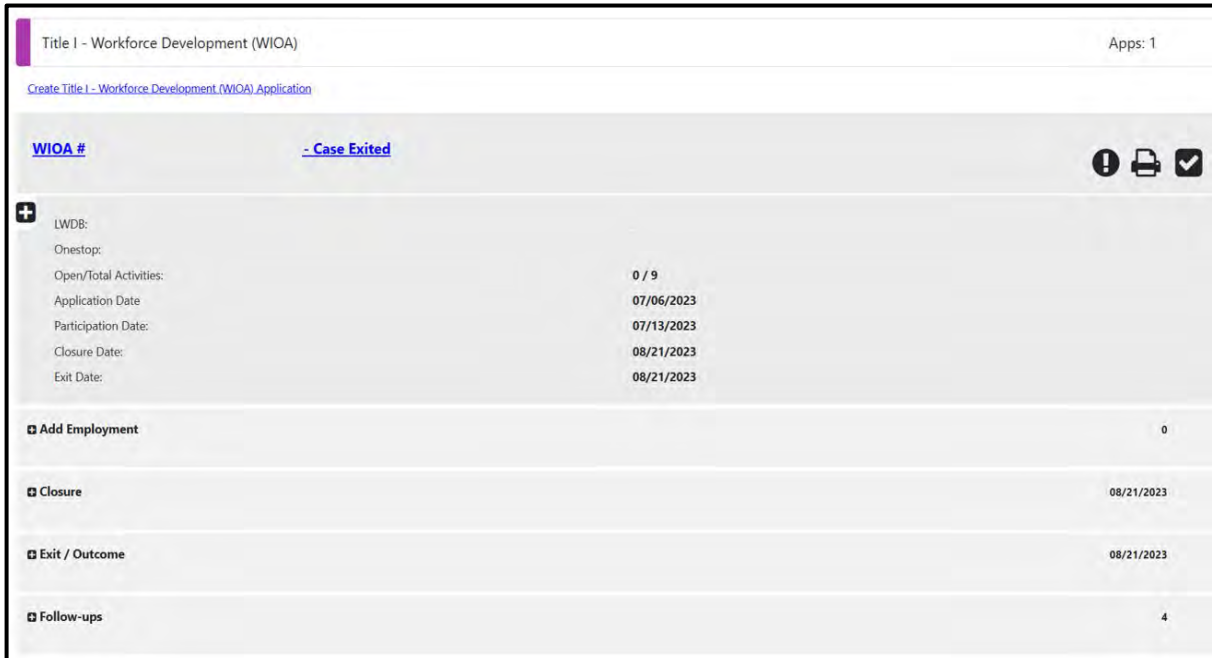
Locating the Follow-up Section

Within the Title I program application, there is a ribbon titled "Follow-ups". This section is for entering follow up information, including employment information. The CalJOBS system generates a follow-up table with follow-up forms for 4 quarters after exit.

Follow the instructions in the example below.

A. Click on the **Follow-ups ribbon** to expand the ribbon.

B. To enter follow-up information, select the link in the *"Follow Up Type"* column for the quarter you would like to enter follow-up information.

C. The first section, ***General Information,*** populates with the system information.

General Information

AppID:	
WIOA Follow-up:	1 - 1st Quarter after Exit
Status:	Required
Working With:	
Username/Login Name:	
User ID:	
State ID:	
Address:	
Prime Phone:	
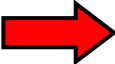
Edit Contact Information

D. The ***Alternate Contact Information*** section can be updated by clicking on the *"Manage Alternate Contacts".*

Alternate Contact Information

Manage Alternate Contacts

Contact List

Contact Name	Relationship	Phone Number	Date Inactive
No Contacts for individual			

E. In the ***Contact Attempts*** section, follow the steps below:

1) Click on *"Add Contact Attempt"* to enter new contact attempt information.

Contact Attempts

Attempt Number	Date	Time	Type Of Contact
No contacts have been attempted.			

Add Contact Attempt   Exit Follow-up Screen

The current maximum number of attempts is configured at 3.

2) Once the Create New Contact Attempt section populates, it is required to enter the Contact Date, Time of Day, Type of Contact, and Other Description if applicable before clicking on the *"Save Contact Attempt"* button.

Create New Contact Attempt

*Contact Date:	▦ Today (MM/DD/YYYY)
*Time of Day:	None Selected ▾
*Type Of Contact:	None Selected ▾
Other Description:	

None Selected
Telephone - Individual
Telephone - Employer/School
Letter or Survey Sent to Individual
Letter or Survey Sent to Employer/School
Worksite visit
Home Visit
Email - Individual
Email - Employer/School
Text - Individual
Text - Employer/School
Other (Specify)

Save Contact Attempt   Cancel

3) If the contact attempt was "Unsuccessful", **do not** proceed to complete the follow up form and "Save". Instead, under the Contact Attempts section, click on "Exit Follow-up Screen" to exit the follow up form.

Contact Attempts

Attempt Number	Date	Time	Type Of Contact
1	05/13/2025	Morning	Telephone - Individual

Add Contact Attempt   Exit Follow-up Screen

The current maximum number of attempts is configured at 3.

After three "Unsuccessful" contact attempts, follow the steps below:

1) A new button *"Multiple attempts with no Success"* will appear after the third attempt has been made. Click on the button.

2) A pop-up message will appear that says, *"You have documented the maximum contacts required, do you wish to close this follow up as cannot locate – multiple attempts with no success?".* Click *"OK"* on the message.

3) Lastly, click on *"Exit Follow-up Screen"* to exit the follow up form.

Contact Attempts

Attempt Number	Date	Time	Type Of Contact
1	05/12/2025	Morning	Telephone - Individual
2	05/12/2025	Afternoon	Telephone - Individual
3	05/12/2025	Evening	Telephone - Individual
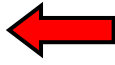
Exit Follow-up Screen

Multiple attempts with no Success

F. If the contact attempt was "Successful", proceed to section four, ***Follow-up Employment Information***.

1) In this section, it is required to complete the questions indicated by the red asterisk. If employed in that quarter, select "Yes" and click on *"Add Employer"* to enter employer information.

Follow-up Employment Information

Employer Name: No Employment information

* **Worked in Quarter 10/01/2023 -**   ⦿ Yes ○ No
12/31/2023?

No employers available.

[Add Employer]

2) Once the *Add/Edit Employer* form populates, there are three sections to the form.

    a. Under the Employer Information section, it is required to complete the questions indicated by the red asterisk. All other fields are optional.

       Note: When selecting an option to verify employer name, additional questions and/or links will populate to fill out.

b. Under the Job Information section, it is required to complete the questions indicated by the red asterisk. All other fields are optional.

Job Information

* Job Title:

* Occupation: Select Occupation

* Is this a green job?   ○ Yes ○ No

* Salary Frequency: None Selected ▾

* Salary Wage:

* Job Start Date: (MM/DD/YYYY)

* Job End Date:
                    ☐ Currently Employed   (MM/DD/YYYY)

* Reason for Leaving: None Selected   ▾

Additional Information on reason for leaving (120 characters max):
Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.
Keyboard shortcut F10, toggles between editor toolbar and edit field.

B I U ✐ ▾ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ⊟ Ω ▾ ⊞ ▾ ☐ ▾
Normal ▾ "Segoe ... ▾ 1..▾ A ▾ ⊠ ← · → · ⊙

[Clear Text]

Job Duties (2500 characters max):
Some HTML tags such as embedded videos are not allowed in this text box and will not be saved.
Keyboard shortcut F10, toggles between editor toolbar and edit field.

B I U ✐ ▾ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ⊟ Ω ▾ ⊞ ▾ ☐ ▾
Normal ▾ "Segoe ... ▾ 1..▾ A ▾ ⊠ ← · → · ⊙

[Insert Occupational Description | Clear Text]

c. After entering Employer and Job information, answer all required questions and fields at the bottom of the form, Non-Traditional Employment and Training Related Employment are specifically reported to the Department of Labor and should be reported accurately.

d. Click on the *"Save"* button to save the changes.

Note: By saving employment information, you might be required to collect source documentation to substantiate the information. For more information on source documentation, see WSD24-15, *WIOA Data Validation Source Documentation*.

To see which follow-up questions are associated with a data element, see Appendix A at the end of this guide card.

G. If not employed in that quarter, select "*No*" and proceed to the ***Follow-up Education Information*** section.

H. In the ***Follow-up Education Information*** section, it is required to complete the question indicated by the red asterisk. If anything other than "No Placement" is selected, Date of Education Placement field is required.

Note: By answering the question under this section, you might be required to collect source documentation to substantiate the information. For more information on source documentation, see WSD24-15, *WIOA Data Validation Source Documentation*.

I. The *Exit and Closure Information* section populates with the system information and no action is required. Proceed to the next section.

Exit and Closure Information

Exit Date:	09/04/2023
Employment Status:	No Closure Employment Information
Youth Status at Exit:	Not attending school; Secondary School Graduate or has a recognized equivalent
Placement Status at Exit:	No Placement

J. In the *Current Status at Follow-up* section, it is required to complete the questions indicated by the red asterisk. All other fields are optional.

Note: If any part of the follow-up was completed (other than Contact Attempts), Status at Follow-Up field is required.

Current Status at Follow-up

Follow-up Information:

* **Actual Date of Follow-Up:**   📧 Today (MM/DD/YYYY)

* **Contact Type:**

None Selected ▼

None Selected
Telephone – Individual
Telephone – Employer/School
Letter or Survey Sent to Individual
Letter or Survey Sent to Employer/School
Worksite visit
Home Visit
Email – Individual
Email – Employer/School
Text – Individual
Text – Employer/School
Other (Specify)

Other (specify):

Follow-up Status

Status at Follow-Up:

Other (specify):

Comments:

K. The last section of the form is the ***Staff Information*** section, it is required to complete the questions indicated by the red asterisk. After all sections are completed, make sure to click on the "Save" button at the bottom of the page to save changes to the form.

Staff Information

* LWIA/Region:	
* Office Location:	▾
Agency Code:	Agency Code Search
	[____] - [_____]
Staff User Create:	
Create Date:	10/23/2024
Staff User Edit:	
Edit Date:	05/13/2025

[Add a new Case Note ⬀ | Show Filter Criteria]

ID	Create Date	Subject	Action
No data found.			

Current Case Manager:	Case currently Not Assigned to a Case Manager
	Assign Case Manager ⬀
	Assign Me
	Remove Case Manager Assignment

Save   Cancel   Print

L. After three "Unsuccessful" contact attempts or the follow-up form was filled in, the system will automatically update the *"Date Complete"* and *"Status"* column of the selected quarter as *"Completed"* under the **Follow-ups ribbon**.

▣ Follow-ups   4

Create Local Follow Up

Search [_____]

Required By	Date Complete	Status	Follow Up Type
12/31/2023	03/28/2024	Completed ⬅	1st Quarter After Exit
03/31/2024	03/28/2024	Completed	2nd Quarter After Exit
06/30/2024	06/28/2024	Completed	3rd Quarter After Exit
09/30/2024	09/12/2024	Completed	4th Quarter After Exit

Showing 1 to 4 of 4 entries

Appendix A

Follow-up questions with associated Data Elements.

Follow-up Questions	Associated DE Number and Name
Worked in Quarter?	1600 – Employed in 1st Quarter after Exit Quarter 1602 – Employed in 2nd Quarter after Exit Quarter 1604 – Employed in 3rd Quarter after Exit Quarter 1606 – Employed in 4th Quarter after Exit Quarter
Verify Employer Name?	1601 – Type of Employment Match 1st Quarter After Exit Quarter 1603 – Type of Employment Match 2nd Quarter After Exit Quarter 1605 – Type of Employment Match 3rd Quarter After Exit Quarter 1607 – Type of Employment Match 4th Quarter After Exit Quarter
Industry Code (NAICS)	1614 – Industry Code of Employment 1st Quarter After Exit Quarter 1615 – Industry Code of Employment 2nd Quarter After Exit Quarter 1616 – Industry Code of Employment 3rd Quarter After Exit Quarter 1617 – Industry Code of Employment 4th Quarter After Exit Quarter
Industry NAICS Code	1610 – Occupational Code 1612 – Occupational Code of Employment 2nd Quarter after Exit Quarter 1613 – Occupational Code of Employment 4th Quarter after Exit Quarter
Salary Frequency Salary Wage	1703 – Wages 1st Quarter After Exit Quarter 1704 – Wages 2nd Quarter After Exit Quarter 1705 – Wages 3rd Quarter After Exit Quarter 1706 – Wages 4th Quarter After Exit Quarter
Is this Entrepreneurial and/or Self-Employment? Is this a Registered Apprenticeship? Is this active Military Service?	1600 – Employed in 1st Quarter after Exit Quarter 1602 – Employed in 2nd Quarter after Exit Quarter 1604 – Employed in 3rd Quarter after Exit Quarter 1606 – Employed in 4th Quarter after Exit Quarter

Follow-up Questions	Associated DE Number and Name
Is this considered Non-Traditional Employment?	1611 – Entered Non-Traditional Employment
Is this considered Training Related Employment?	1608 – Employment Related to Training (2nd Quarter after Exit)

Employment Transition Meeting

Participant Information

Participant Name: _____

Participant ID (CalJOBS/Program): _____

Program (check all that apply):

☐ WIOA Adult ☐ WIOA Dislocated Worker ☐ WIOA Youth

☐ NFJP ☐ Other Non-WIOA Program (specify): _____

Date of meeting: _____

Meeting Conducted By (Staff Name): _____

Method of Meeting: ☐ In-Person ☐ Phone ☐ Video/Virtual

Employment Verification

Employer Name: _____

Worksite Address/Location: _____

Job Title/Occupation: _____

Start Date: _____

Employment Type: ☐ Full-Time ☐ Part-Time ☐ Temporary ☐ Seasonal

Wage (if voluntarily provided): $_____ / ☐ Hour ☐ Salary

Work Schedule/Hours: _____

Training-Related Employment? ☐ Yes ☐ No ☐ N/A

Anticipated Job Retention or Workplace Challenges Identified:

_____

_____

_____

Follow-Up Services Explanation

Staff must review follow-up expectations with the participant.

Follow-up requirements explained? ☐ Yes ☐ No

Participant informed of four-quarter follow-up after exit? ☐ Yes ☐ No

Supportive services policy explained (Youth vs. Adult/DW)?

☐ Yes ☐ N/A (Program does not allow post-exit supportive services)

Notes:

_____

_____

_____

Preferred Contact Method for Follow-Up

Primary Phone: _____

☐ Voice ☐ Text

Email: _____

Preferred Method(s) of Contact (select all):

☐ Phone ☐ Text ☐ Email ☐ Mail ☐ Other: _____

Best Days/Times to Contact: _____

Alternate Contact Person

(For follow-up and re-engagement attempts; participant consent required.)

Alternate Contact Name: _____

Relationship to Participant: _____

Phone: _____

Email or Address: _____

Authorized to: (check any that apply)

☐ Confirm participant's contact information

☐ Provide employment/education verification

☐ Relay messages only

Remaining Needs Prior to Exit

Identify any needs that must be addressed before case closure.

Remaining services or supports identified?

☐ Yes ☐ No

If yes, describe:

_____

_____

_____

Final services or referrals completed prior to exit:

_____

_____

_____

6. Staff Documentation

All ETM information entered in CalJOBS?

☐ Yes ☐ No (explain): _____

Case Note completed in CalJOBS?

☐ Yes ☐ No

If ETM not completed:

☐ Participant declined ☐ Unable to contact

Dates and methods of attempts:

_____

_____

_____

Staff Signature: _____ Date: _____

Preferred Method of Communication

Participant Information
Participant Name: _____
Participant ID (CalJOBS/Program): _____
Program (check all that apply):
☐ WIOA Adult   ☐ WIOA Dislocated Worker   ☐ WIOA Youth
☐ NFJP   ☐ Other Non-WIOA Program (specify): _____
Date Information Obtained: _____
Information Obtained By (Staff Name): _____
Method of Meeting: ☐ In-Person   ☐ Phone   ☐ Video/Virtual

Preferred Method of Communication
Primary Phone: _____
☐ Voice   ☐ Text
Email: _____
Preferred Method(s) of Contact (select all):
☐ Phone   ☐ Text   ☐ Email   ☐ Mail   ☐ Other: _____
Best Days/Times to Contact: _____

Alternate Contact Person
(For follow-up and re-engagement attempts; participant consent required.)
Alternate Contact Name: _____
Relationship to Participant: _____
Phone: _____
Email or Address: _____
Authorized to: (check any that apply)
☐ Confirm participant's contact information
☐ Provide employment/education verification
☐ Relay messages only

Staff Signature: _____ Date: _____