

Introduction to GPMS Data Collection Handbook
Module II, Assignment
Version 1.1

Version 1.0 of the GPMS Data Collection Handbook is designed to assist grantees and sub-grantees with the transition from SPARQ to the GPMS. This second module is focused on the second main menu item in the GPMS, Assignments, and includes all the tabs in that menu item, as well as several related tabs, as listed in the heading on each page of the module. For ease of reference, the Handbook contains screen shots, with added sequential numbering of each field in each screenshot.

This first version of Module II, like Module I and the GPMS itself, is very much a work in progress. Although the screenshots and data elements reflect the version of the GPMS production environment as the module was being drafted and reviewed, changes to the GPMS screens are occurring regularly, and Version 1.0 will not match the GPMS screens exactly in many instances. The Handbook incorporates changes to the GPMS that have been designed and scheduled for production, and new versions of each module will be issued as soon as feasible after new screenshots become available.

The Handbook text provides descriptions of the data elements, explanations of how best to capture and record the required information, and, where relevant, discussions of how the data elements relate to the SCSEP performance measures. Some of the descriptions and explanations contain additional comments. These comments do not always pertain directly to completing the data field but will give the user a fuller understanding of the data element. Therefore, all grantees and sub-grantees, including those that are initially collecting the required data in their own data collection systems, will need to be familiar with and follow the information in this Handbook.

There are “topics” in an appendix to each module of the Handbook. These topics provide more extended discussion of important issues for the data collection and reporting system. Topics generally address broad concepts, such as: what “exit” means, when follow-ups must be completed, and what services may be provided before assigning an applicant to community service. The topics are organized by the headings and sub-headings of the GPMS screen shots and have brief descriptive titles. Discussions of data elements and topics that were in the last revision of the SPARQ Data Collection Handbook and are relevant to the GPMS have been edited and retained in the GPMS Handbook.

In addition, the Handbook references some of the edits and validations in the GPMS that control how, when, and in what form data must be entered. For complete information on the technical requirements for the data system, users should see the GPMS Users’ Guide and other relevant information on the Older Worker Community of Practice (CoP) <https://olderworkers.workforcegps.org/GPMS>. As they become available, PDF versions of each module of the GPMS Data Collection Handbook will be available at the CoP.

The Handbook has a version number and a date on the bottom of each page. The hard copy version of the Handbook that users may have been given may not contain the most up-to-date version of the modules. However, the version on the CoP will always be the most recent, and users are encouraged to check that site regularly. Additions and clarifications to the Handbook may also be posted on the CoP as they occur. In addition to the Table of Contents, the PDF versions of the Handbook and the Appendices have a search function that allows users to search for key words. The search function will bring you to each instance of the search terms in the Handbook. This is probably the easiest and quickest way to find topics in the appendix.

In Version 1.1 of the Module II, revisions made to both screen shots and the field names are noted in the text. In addition, revisions have been made to the instructions for the following fields:

- Section I, Assignment Details
 - Field 2.10b *Salutation*
 - Field 2.13 *Supervisor's Wage per Hour**
 - Field 2.20 *Wage per Hour**
 - Field 2.21 *Hours per Week**
- Section VI, Paid Hours
 - Field 15.1 *Program Year*

Table of Contents

I. ASSIGNMENT DETAILS (Revised, Version 1.1).....	3
II. ADD NEW HOST AGENCY (Revised, Version 1.1)	8
III. PARTICIPANT REQUIRED ACTIONS (Revised, Version 1.1)	11
IV. APPROVED BREAKS.....	14
V. TRAINING AND SERVICES	16
VI. PAID HOURS (Revised, Version 1.1)	19
VII. PAID HOURS UTILITY.....	21

I. ASSIGNMENT DETAILS

I. ASSIGNMENT DETAILS (Revised, Version 1.1)

1 ASSIGNMENT DETAILS

Mary Lamb (Case ID: 10868451)

1.1

1.2

ADD ASSIGNMENT

ADD TO WAITLIST

Summary **Assignments** Participant Required Actions Participant History Extensions Related Actions

Pending

Pending Eligibility
Approval

Eligible

Active

Pending
Recertification

Exited - In Follow-Up

Exited - Closed

Locked

Participant Summary

Participant Name	Participant ID	State	Case ID
Mary Lamb	CMS010005001	California	10868451
Grant Number	Age	County	Enrollment Date
AD36226216000	65	Alameda County	

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
No Assignments available			

1. Assignment Details. When the final eligibility determination has been made by the supervisor and all of the Intake fields required before an assignment have been valued, you should select Assignment Details from the menu. Doing so brings you to an updated Participant Summary. This screen allows you to add an assignment (field 1.1) or to place the eligible applicant on the waiting list (field 1.2).

1.1. Add Assignment. An eligible applicant does not become a participant and is not allowed to receive any SCSEP services, including orientation, training or placement activity, until the applicant has been assigned to community service and the assignment screen has been filled out.

- A new form must be filled out for each community service assignment of a participant.
- A participant can have only one community service assignment at a time.
- If you are entering a new community service assignment for an existing participant, you must first close the old assignment (field 2.3 below), along with any open approved breaks in participation (field 11.4 below) and open trainings or services (field 13.3 below). A new assignment form must be entered for each assignment. Do not delete any information associated with the old assignment.
- Whether you are entering an initial assignment for a newly eligible applicant or adding a new assignment for an existing participant, clicking on field 1.1 will bring you to the fields for entering the assignment details.

1.2. Add to Waiting List. If there is no suitable assignment available for an eligible applicant within two weeks of the final eligibility determination, you should place the individual on the waiting list. Clicking on field 1.2 will accomplish that. No additional information is required.

- In a future release of the GPMS, the case worker will receive a task if an applicant is not assigned or placed on the waiting list within two weeks of being determined eligible.

GPMS DATA COLLECTION HANDBOOK
 ASSIGNMENT: Assignment Details, Add New Host Agency,
 Participant Required Actions, Approved Breaks, Training and Services, Paid Hours

I. ASSIGNMENT DETAILS

Add Assignment

Pending	Pending Eligibility Approval	Eligible	Active	Pending Recertification	Exited - In Follow-Up	Exited - Closed	Locked
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Participant Summary

Participant Name Anie Oakley	Participant ID CMS010005151	State California	Case ID 10868611
Grant Number AD36226216000	Age 62	County Alameda County	Enrollment Date

Assignment Details

2.1 Assignment Date *

2.6 State

California

2.2 Assignment Start Date

2.3 Assignment End Date

2.4 Job Code

Please select a Job Code

Please select a Job Code

- Management Occupations
- Business and Financial Operations Occup.
- Computer and Mathematical Occupations
- Architecture and Engineering Occupations
- Life, Physical, and Social Science Occupations
- Community and Social Service Occupations

2.5 Workers' Comp Code

2.7 City

San Francisco

2.8 Organization Name

Master's Table

2.6 State

California

2.7 City

San Francisco

2.8 Organization Name

Master's Table

Agency ID	Name	FEIN	Address	Primary Contact
No Organization Agencies Available				

[ADD NEW HOST AGENCY](#)

2.9 Site Name and Location

2.10 Survey Contact *

Please select a survey contact

2.10a [\[+\] New Survey Contact](#)

Add New Contact

2.10b Contact Details

2.10c Salutation

Please Select Value

2.10d Contact First Name *

2.10e Contact Last Name *

2.10f ☐ Check if Different than the Host Agency Address

2.10g Title

2.10h Cell Phone Number *

2.10i Fax Number

2.10j E-mail

2.11 Supervisor

Please select a Supervisor

Select only if Supervisor is different than Contact

2.12 Supervisor Funding Source Type

☐ Federal

☒ Non-federal

2.13 Supervisor's Wage per Hour *

2.14 Supervisor's Number of Hours per week *

2.15 Participant's Schedule

2.16 Assigned To *

☒ Grantee or sub-recipient/ local project

☐ Workforce Partner

☐ Other host agency

2.17 CSA Code Type *

☐ General

☒ Elderly

2.18 CSA Code *

E1. Project Administration

2.19 CSA Title

2.20 Wage per Hour *

2.21 Hours per week *

2.22 Comments

2.1. Assignment Date. Enter the date on which you assigned the applicant to a specific host agency that agreed to accept the participant.

- For new applicants, this is the date on which the applicant becomes a participant and can receive SCSEP services, including all the Participant Required Actions (see Section III below), education and training, and supportive services (see Section V below). It is also the date on which the participant can begin to receive wages.

I. ASSIGNMENT DETAILS

- For reassigned participants, the date will be the first day of assignment to the new host agency regardless of whether the participant actually starts work on that day.
- Field 2.1 is the date the assignment was made regardless of when the participant reported to the host agency or when the participant first received wages. You may pay wages once the assignment has been made, but only if the participant is engaging in some SCSEP activities, e.g., orientation, assessment, IEP, training, prior to reporting to the host agency. See the Appendix for topic about permissible activities prior to assignment. Field 2.2 is the date on which the participant first reported to the host agency.
- A participant can only have one assignment at a time and must remain assigned to a host agency throughout the period of enrollment unless the participant is on an approved break in participation. The assignment date (field 2.1) is the date on which the host agency and the participant agree that the participant will perform community service at that host agency. For first assignments, this date is straightforward. For subsequent assignments, the participant cannot be assigned to a new host agency until the assignment at the old host agency has ended.
- NOTE: Whether participants are considered employees and, if so, whether they are employees of the sub-grantee or the host agency, is a matter of state law. The Department considers participants to be trainees rather than employees, and the regulations provide that participants are not federal employee. However, the regulations do not take a position on whether participants might be considered employees of some other entity. The regulations require grantees to consult with the appropriate state authorities, such as the attorney general or the state Department of Labor.

2.2. Assignment Start Date. Enter the date on which the participant actually commenced work with the host agency. This date may be different from the assignment date if, for example, the participant attended orientation or training before reporting to the assignment with the host agency.

2.3. Assignment End Date. Enter the date on which the participant ended the community service assignment with this host agency. This will usually be either the date of exit or the day before reassignment to a new host agency.

- An individual must be assigned to community service in order to be a participant. The data system assumes that a participant without an open community service assignment should have been exited or placed on an approved break in participation. Therefore, do not enter an end date for a participant unless: 1) You are assigning that participant to a new host agency; 2) You are exiting the participant; or 3) You are placing the participant on an approved leave of absence and the participant is not returning to the current host agency. (See Section III below.)
- If the participant exits for unsubsidized employment and exercises the Right of Return (See the Exit module and the associated topics in its Appendix), when you delete the exit, you must also immediately make a new community service assignment for the participant even if that is the same host agency that the participant has left to enter unsubsidized employment and will be returning to now that the employment has not worked out. You must also add an approved break in participation that lasts at least as long as the gap between assignments. You must comply with all requirements for applying the Right of Return: exit for unsubsidized employment; placement lasts for no more than 30 days; and data entry must be done within 90 days of exit.
- The three host agency dates in fields 2.1-2.3 are critically important, and great care should be taken to enter them accurately. The end date will be used to determine which host agencies are eligible for participation in the customer satisfaction survey each year and to calculate average duration of assignments.

2.4 Host Agency Job Codes. You may use this field select one of the pre-defined codes to indicate the type of jobs that the participant is interested in and the specific assignment, training, and placement the participant is receiving in this assignment.

2.5. Worker's Comp Code. Grantees may designate state-based workers' compensation codes for use by their sub-grantees. There is no nationwide list of codes.

I. ASSIGNMENT DETAILS

2.6-2.8. Host Agency Search. Enter the name, city, and state of the host agency to which the participant is being assigned and click “Search.” The GPMS will return a list of all organizations in the city and state that match or may match the host agency you are seeking. If the list contains the host agency you want, you must select it. The system will not allow you to enter a duplicate host agency. If the organization you want is not listed, click on Add New Host Agency and fill out fields 3-4.6 below.

- It is critical that you do not needlessly create a new host agency just because the participant will be working at a branch location. However, there are circumstances where using the name of the parent organization will not be feasible. In those cases, you may enter multiple organizations with similar but not identical names in the same state. For example, Goodwill LA North, Goodwill LA Central, and Goodwill LA East are properly considered unique organizations even though they are all in Los Angeles, California; the geographic suffix allows them all to be entered. See the Appendix for additional information about avoiding duplicate organizations.

2.9. Site Name and Location. You may enter here the site of this host agency at which the participant is assigned. This field is not required and is solely for case management purposes. Do not enter a full address, just enough information to allow you to locate the participant.

2.10. Survey Contact. You must select from the dropdown the host agency person who will receive the customer satisfaction survey. The survey contact should not be confused with the primary host agency contact for administrative purposes or the participant’s supervisor. There are separate fields for those individuals.

- If the person who should be the survey contact person for this participant is not listed in the dropdown, you should click on “Add New Contact” and enter a new survey contact. This new contact will then be available to be used as the survey contact person in the fields below, a supervisor, or even the primary administrative contact for the host agency.
- If you want to designate a new survey contact as also being the primary administrative contact, you will need to go to the Administrative Console. See field 5.5 in Section II below.

2.10a-2.10h. Add New Survey Contact (Revised, Version 1.1) . If you do not see the contact person you want in the dropdown for field 2.10, click on Add New Contact. You then must complete fields 2.10a-2.10h.

- **2.10a and 2.10b (Revised, Version 1.1).** Enter the contact person’s name and salutation as you want them to appear in a letter or email.
- **2.10d.** If the contact’s address is different from the main address of the host agency, e.g., the contact works at a satellite location, check the box in this field. Doing so will open additional fields in which you must enter the contact person’s address. Do not check this box if the address is the same as the main host agency address.
- **2.10e.** Enter the title of the survey contact person. Title is for grantee use only; it is not used in transmitting the surveys. In a future release of the GPMS, there will be a field for salutation; this field is used in transmitting the surveys.
- **2.10f.** Enter the contact’s cell phone number if you can obtain it. This is important for identifying duplicate contact person entries and may be used for delivering the survey.
- **2.10g.** Enter the fax number for the contact person’s location if there is one.
- **2.10h.** It is critical that you obtain the survey contact person’s email address and enter it accurately. Because this address will be used to deliver the survey, it is also critical that you regularly conduct business by email with the contact person. This will ensure that the email remains accurate and that the contact becomes accustomed to receiving email from you.

2.11. Supervisor. Enter the name and contact information for the participant’s supervisor only if that person is different from the survey contact. If the person you need as the supervisor is not listed in the dropdown, you can add a new contact for the host agency through the function for adding organizations and contacts in the Administrative Console. See field 5.5 in Section II below.

2.12-2.14. Supervisor’s funding source, wages, and hours (Revised field names, Version 1.1).

- Field 2.12 allows you to indicate whether the supervisor (or contact person/supervisor if one individual has both positions) is federally funded or not federally funded. This information may help you determine the amount of

I. ASSIGNMENT DETAILS

in-kind contribution made by the host agency to your project. For non-federally funded supervisors, you can also indicate the average number of hours per week spent on supervision of all SCSEP participants and the supervisor's average hourly wage. Grantees can use this information to determine what documentation of non-federal match for their program to seek from the host agency. This field is optional, but if you select non-federal, the next two fields are required.

- SCSEP does not have any specific requirements for the 10% match other than those contained in the regulations. Section 641.809 specifically incorporates the cost sharing rules of 29 CFR 97.24 and 29 CFR 95.23. All non-federal match must be documented. For in-kind labor provided by a third party, you must apply procedures for documenting and valuing time comparable to those you use for your own employees.
 - Field 2.13 (*Revised field name, Version 1.1*) is for recording the supervisor's hourly wage for time spent in supervision of this participant.
 - Field 2.14 records the average number of hours per week that the individual spends supervising this participant.

2.15. Participant's schedule. You may use this optional field to record the participant's work schedule to facilitate contacting the participant and for recording how many hours per week the participant is at the host agency.

2.16. Assigned To. You must select one value to indicate whether the participant is assigned to the grantee or sub-grantee as participant staff, to a workforce partner, such as the one stop center, or to any other type of host agency. The participant's starting wage and average hours per week on CSA (fields 2.20 and 2.21) are only required if you select one of the first two values.

2.17 and 2.18. CSA Code Type and CSA Code. The CSA codes are divided into two main categories: service to the general community and service to the elderly community. Enter only one code for the type of community service to which the participant is assigned.

- If the type of assignment you need is not listed, enter the appropriate code for "other," either G14 or E14, depending on whether the service is to the general community or the elderly community.
- The codes reflect the nature of the work the host agency does rather than the participant's specific occupation or title. For example, a receptionist working for a visiting nurse association would be coded G2, while a bus driver for a senior center would be coded E5.
- If the participant is assigned to the grantee's or sub-grantee's project office, you must select value E1, Project Administration, as the community service assignment code.

2.19. Participant's CSA Title. Enter the title of the community service position to which the participant was assigned as determined by the host agency. This should be a descriptive title, such as receptionist, nutrition aide, or bus driver. No occupational code is required.

- You do not create a new community service assignment when the participant remains at the same host agency but the participant's job duties and title change. You can update fields 2.4 and 2.16 to reflect the new job title. Field 2.15, the Community Service Assignment Code, should not change. The code defines the host agency, not the participant's particular job with the host agency.

2.20 and 2.21. Wage Per Hour* and Hours Per Week* (*Revised field names, Version 1.1*). These fields are only required when "Participant assigned to" (field 2.16) values (i) or (2), staff assigned to a SCSEP project office or to a workforce partner. If you wish, you may also use this field for participants assigned to regular host agencies.

2.22. Comments. You may enter here any comments pertaining to the assignment.

II. ADD NEW HOST AGENCY

II. ADD NEW HOST AGENCY (Revised, Version 1.1)

Add Organization

3 ▲ Organization Details

3.1 Organization Name **3.2** Organization Type *
 Lucy's House
☐ Government
☐ Profit
☐ Not For Profit
A value is required

3.3 FEIN
A value is required

3.4 Address Line 1 *
A value is required

3.5 Address Line 2

3.6 City * **3.7** State * **3.8** Zip * **3.9** Zip+4
A value is required

3.8 State *
 Search
 Select a State
 Alabama
 Alaska
 American Samoa

3.9 Zip *
A value is required

4 ▼ Additional Details

4.1 Organization Function **4.2** Organization Continued Availability
 Host Agency
 --- Please select a value ---
 Host Agency
 Employer
 Service Provider
 Add New

4.2 Organization Continued Availability
☐ Available
☐ Not Available
x

4.3 Host Agency Agreement Date **4.4** Host Agency Monitoring Visit Date
 mm/dd/yyyy

4.5 Job Codes
 Select at most 3 Job Codes--
 Management Occupations
 Business and Financial Operations Occupations
 Computer and Mathematical Occupations
 Architecture and Engineering Occupations

3-4.5 Add Organization. In addition to the Add Host New Agency function in field 2.6, the Administrative Console allows you to add an organization and identify it as a host agency, service provider, employer, or any combination of these three types. This function is very similar to the organization utility in SPARQ.

- You can only use this function after searching for the name, city, and state of the entity you want and having the system fail to return any matches. At that point, you can create the new entity.
- It is critical that you always add a new agency type (field 4.1) to an existing entity like a host agency rather than creating a new, duplicate entity for that host agency when it becomes the employer of a participant who has left the program. The duplication of the entity distorts your data and will prevent the entity from getting the proper surveys.
- This function is dynamic and will display different fields based on each entity type you want to assign to the entity. There are also validations that will prevent you from designating an entity type that does not have the correct characteristics.
- You use this function to create contact persons and supervisors for a new entity. See fields 5-6.6 below. At the time you create a CSA, training event, or placement, you can add additional contact persons and supervisors if the ones you need have not yet been created.

3.1. Organization Name. Enter the name of the parent organization as you want it to appear in a letter or email that is transmitting a customer satisfaction survey.

- It is critical that you do not needlessly create a new entity just because the participant will be attending a branch location. However, there are circumstances where using the name of the parent organization will not be feasible. In those cases, you may enter multiple organizations with similar but not identical names in the same state. For example, Goodwill LA North, Goodwill LA Central, and Goodwill LA East are considered unique organizations even though they are all in Los Angeles, California. See the Appendix for additional information about avoiding duplicate organizations.

3.2. Organization Type. You may ultimately identify the organization as two or three types, but you must select and complete one type at a time.

- Host agencies must be either Section 501(c)(3) non-profit organizations or government agencies.
- Employers and training providers may be any organization type.

3.3. FEIN. You may enter the entity's FEIN if you wish. It is not required.

II. ADD NEW HOST AGENCY

3.4-3.9. Address. Enter the address at which mail is most likely to be delivered by the Postal Service. Do not put any extraneous information or characters in these fields. If you need other information about the entity, use a comment field; do not put it into these fields.

4.1 Organization Function. (*Revised field name, Version 1.1*). Select the first agency function for a new entity. For an existing entity, you can select an additional agency function by clicking “Add New.” An entity may serve all three functions, but you can only function one type at a time.

- Each agency function you indicate in this field may cause additional fields that are relevant to that agency function to be displayed. In the screenshot above, fields 4.2-4.4 are only displayed for host agencies.

4.2. Organization Continued Eligibility. Use this field to indicate if an existing organization should no longer be used by the grantee or sub-grantee. This field should only be valued by a grantee or sub-grantee administrator.

4.3. Hosts Agency Agreement Date.

- Indicate the date on which the last host agency agreement was signed. You may use this date as a tickler for the renewal of the host agency agreement. Only sub-grantee administrators should enter this information.
- This field may be entered by each sub-grantee that uses the organization record and will display only for the sub-grantee that enters the information.

4.4. Host Agency Monitoring Visit Date.

- Indicate the date on which the last host agency monitoring visit was conducted.
- This field may be entered by each sub-grantee that uses the organization record and will display only for the sub-grantee that enters the information.

4.5. Job Codes. You may record up to three of the pre-defined codes to indicate the types of jobs this host agency provides. These codes are also used in the intake form to indicate the types of jobs that the participant is interested in and the specific assignment, training, and placement the participant has received.

- These codes may be entered by the sub-grantee that creates the organization record and will display for any sub-grantee that uses this organization.

II. ADD NEW HOST AGENCY

5 ▲ Contact Information

5.1 Salutation

Please Select Value

 Please Select Value
 DNVR
 Dr.
 Mr.

5.2 Contact First Name *

A value is required

5.4 Title *

A value is required

5.6 Primary Contact Number

5.8 Alternate Contact Number

5.10 Fax Number

5.3 Contact Last Name *

A value is required

5.5 Is Primary POC?

☒ Yes ☐ No

5.7 Primary Extension

☐ Cell?

5.9 Alternate Extension

☐ Cell?

5.11 E-mail

6 ▲ Contact Address

☒ Check if Contact Address is different than the Organization Address

☒ Check if Location Name is different than Organization Address

6.1 Location Name

6.2 Address *

A value is required

6.3 City *

A value is required

6.4 State *

--- Select a State ---

 --- Select a State ---
 Alabama
 Alaska
 American Samoa

6.5 Zip *

A value is required

6.6 Zip+4

5. Contact Information. As part of adding a new organization through the Administration Console, you must also create contacts. These are individual who are then selected as the Primary Administrative Contact for the organization, as survey contacts for specific CSA assignments and unsubsidized placements, and as supervisors.

- 5.1-5.3. Enter the contact name and salutation as you want it to appear in a letter or email that is used to transmit the customer satisfaction surveys. Do not put any special characters or other information into the name fields.
- 5.4. Title is solely for grantee use. It is not used in transmitting the surveys. In a future release of the GPMS, there will be a field for salutation, which is used in transmitting the surveys.
- 5.5. Check the box to indicate if this individual is the primary contact for administrative purposes, e.g., signing the host agency agreement. This individual may also serve as the survey contact or supervisor for a specific CSA or placement.
- 5.6-5.10. Be sure to check the boxes if the primary and alternate phone numbers are for cell phones. Cell phones may be used for sending text messages.
- 5.11. It is critical that you obtain the survey contact person's email address and enter it accurately. Because this address will be used to deliver the survey, it is also critical that you regularly conduct business by email with the contact person. This will ensure that the email remains accurate and that the contact becomes accustomed to receiving email from you.
- 6-6.6. You do not need to enter the contact's address or location if they are the same as those of the organization itself. Fields 6.1-6.6 will be displayed only if you check the boxes to indicate that the address and location are different.

III. PARTICIPANT REQUIRED ACTIONS

III. PARTICIPANT REQUIRED ACTIONS (Revised, Version 1.1)

Agnes Walsh (Case ID: 10869291)

Summary Assignments **Participant Required Actions** Participant History Extensions Related Actions

Pending Pending Eligibility Approval Eligible Active Pending Recertification Exited - In Follow-Up

Participant Summary

Participant Name	Participant ID	State	Case ID
Agnes Walsh	CMS010005742	California	10871742
Grant Number	Age	County	Enrollment Date
AD36226216000	65	Alameda County	12/12/2022
Is Re-Enrolled			
No			

[Orientation](#) | [Offer Of Physical Exam](#) | [Participant Safety Consultation](#) | [Assessment and Re-assessment/IEP](#)

III. Participant Required Actions (PRA) (Participant Summary Screen Shot Revised, Version 1.1)

- Participant Summary now displays three new elements: "Is Re-Enrolled," "Case ID," and "Enrollment Date."
- After the participant is assigned to a host agency, you will be able to access the PRA screen from the main menu. It contains four critical services that a new participant should receive at or shortly after the time of enrollment and for which participants must be paid. All of these services, except orientation, must be repeated during the participant's enrollments. Additional services and training activities that are available during an assignment are presented in Section V below.

7 Orientation Details

7.1 Orientation Date *	7.2 Provided By *
mm/dd/yyyy	

7-7.2. Orientation. All participants must receive an orientation to SCSEP and to the grantee's operation, including its policies, procedures, services, and expectations at or shortly after the time of initial enrollment. This orientation should not be confused with the Program Overview, which must be provided to all applicants before they are assigned. See fields 20-20.2 (Program Introduction) of Module I of the handbook.

- Enter the date on which the orientation was completed in field 7.1 and the name of staff person conducting the orientation in field 7.2.

8 Physical Exam Details

8.1 Date of Offer of Physical Exam * ?	8.2 Declined Offer of Physical Exam * ?	8.3 Provided By * ?
mm/dd/yyyy	☐ Yes ☐ No	

8-8.3. Offer of Physical Exam. Grantees are required to offer all participants an annual physical at the grantee's expense. This physical, as a fringe benefit, is solely for the benefit of the participant; it may not be used for the grantee's own purposes. Grantees may not ask to see the results of the physical or ask any questions about it. If a participant declines the offer of a physical, grantees must obtain a signed waiver.

III. PARTICIPANT REQUIRED ACTIONS

- The exam must be offered once every 12 months. That must be around the time of the anniversary date of the participant's enrollment. It does not have to be at the time the recertification is done. Grantees are free to standardize the recertification date, and many grantees have chosen to do all recertifications at the same time each year regardless of when the participant first enrolled. Since the offer of the physical must be made every 12 months, the date can only be standardized for all participants if the second offer of a physical is made in 12 months or less. The acceleration of the date of the second offer of a physical could result in unnecessary expense and is not recommended. The Appendix contains additional information about the offer of the physical exam.
- Enter the date on which the offer of a physical exam was offered in field 8.1, whether the offer was declined or accepted in field 8.2, and the name of staff person who made the offer in field 8.3.

9 Participant Safety Consultation

9.1 Participant Safety Consultation Date *

9.2 Provided By *

mm/dd/yyyy	
------------	--

9-9.2. Participant Safety Consultation. (Revised field name, Version 1.1). Unlike the date of host agency monitoring visit (field 4.4 above), which relates to the entire host agency, this field is specific to the participant. It records the date of the safety consultation with this participant on-site at this host agency.

- The safety consultation should be performed on an annual basis to ensure that the participant has a safe working environment, as required by the OAA. See the Programmatic Assurances incorporated into all grants, Attachment IV-2 of the PY 2022 Grant Plan Instructions and Allotments, "Community Service Assignment."
- Enter the date on which the safety consultation with the participant was completed in field 9.1 and the name of staff person who conducted the consultation in field 9.2.

10 Assessment/IEP Details

10.1 Assessment (Re-assessment) Date *

10.2

Supportive Services Needed? *

10.3

Transition Planning

10.4

IEP Date

10.5

Provided By *

mm/dd/yyyy	☐ Yes ☐ No	mm/dd/yyyy	mm/dd/yyyy	
------------	--	------------	------------	--

10. Assessment/IEP. The assessment and IEP are the foundation for all SCSEP services. The statute and regulations require that an assessment must be conducted, and the IEP updated, whenever circumstances warrant, but at least twice in each 12-month period. If there are no changes in the participant's circumstances, grantees are free to determine when, within the 12-month period, the two assessments will be conducted, and the IEP updated.

- The GPMS has various tasks and notifications to remind and require grantees to update these field. If a participant is on an extended leave of absence and the substantive updating of the IEP will be delayed until the participant's return, the grantee can update the IEP with something like, "Still on approved break; expected to return on X; IEP to be revised then." That would allow the grantee to enter a date of the assessment and IEP update in the system and avoid or clear any tasks and notifications.
- You do not overwrite any data in these fields. Each time you need to update the assessment and IEP, the GPMS will let you generate a new set of fields.

10.1. Assessment/Reassessment) Date. Enter the date on which the initial formal assessment was completed. This should be shortly after the date of enrollment. This assessment should not be confused with the Pre-assessment, which must be provided to all applicants before they are assigned. See fields 20-20.1 (Program Introduction) of Module I of the handbook.

III. PARTICIPANT REQUIRED ACTIONS

10.2. Supportive Services Needed? SCSEP participants are entitled to supportive services as identified in their IEPs to assist them in successfully participating in the program. Supportive services may be provided while participants are in community service or in the first twelve months of unsubsidized employment.

- Permissible supportive services during employment include help with transportation, uniforms or other work-related expenses, eyeglasses, and medical care. Paid training is not part of the follow-up services that may be provided to exited participants who are in unsubsidized employment.
- Grantees cannot by policy limit their responsibility to help participants obtain needed supportive services. Grantees are required by the regulations to assess all participants to determine their need for supportive services and to make every effort to assist participants in obtaining needed supportive services. For this reason, the need for supportive services must be evaluated and documented with the IEP.
- If you select “Yes” for this field, the GPMS will take you to the supportive services details on the Training and Services screen. See Section V below. You can enter the details of any supportive services that you have arranged for on this screen, or you may come back to this screen later if you are not yet ready to enter any supportive services details. You do not need to wait for an assessment to enter supportive services. You can access this screen at any time by selecting Training and Services from the main menu.

10.3. Transition Planning. Participants who are approaching their durational limit and are unlikely to find unsubsidized employment prior to exit must be provided with transition services. The transition plan must be reflected in the participant’s assessment and IEP, and date must be updated for each reassessment. Depending on the participant’s status and remaining durational limit time, the GPMS will generate tasks and notifications for updating this field.

- Enter the date of the most recent transition plan activity in this field.
- For participants exiting for durational limit, transition planning should commence twelve months before the durational limit date. For these participants, you must enter the date of the latest transition planning activity for a given assessment or reassessment even if it is the same as the date for transition planning in the prior assessment.
- If unsubsidized employment is determined not to be feasible for a participant who is not yet within a year of their durational limit date, planning for a transition to other forms of self-sufficiency should be reflected in all future assessments and IEPs and the date of the latest planning must be entered into this field for each reassessment.
 - If transition planning is not yet required or appropriate for a participant who is more than 12 months before the durational limit date, i.e., unsubsidized employment is still feasible and is reflected in the IEP goals, the GPMS will currently let you enter this placeholder date that stands for “Not applicable”: 09/09/2099. This placeholder is likely to be changed in a future release of the GPMS.

10.4. IEP Date. Enter the date on which the IEP for this assessment or re-assessment was completed.

10.5. Provided By: Enter the name of the staff member who developed the IEP with the participant and obtained the participant’s signature.

IV. APPROVED BREAKS

IV. APPROVED BREAKS

11 Break in Service Details

11.1 Assignment* Select an Assignment Select an Assignment 11/08/2022 - 10/17/2022 - 11/07/2022 11.2 Approved Break Start Date* mm/dd/yyyy 📅 11.3 Expected End Date mm/dd/yyyy 📅 11.4 Actual End Date mm/dd/yyyy 📅 11.5 Is Documentation Provided? ☐ Yes ☐ No	11.6 Reason for Approved Break in Participation?* ☐ Family/health ☐ Personal ☐ Administrative ☐ Right of Return ☒ Other 11.7 Other Reason* 11.8 Comments
--	--

11. Approved Break in Participation. If a participant is without an open host agency assignment for four or more days, you must enter an approved break in service. A participant on an approved break is still a participant. Reasons for approved breaks must be set forth in the grantee's policies and must be consistent with SCSEP's rules. Leaves of absence of four days or more that are properly entered into SPARQ will not be included in calculating the durational limits for projects or participants. Failure to enter a leave of absence will work to the disadvantage of the grantee and of the participant.

- You should use this field to record a leave of absence when the participant is returning to his or her current host agency. In that case, you do not enter an end date for the assignment while the participant is on leave.
- You should also use this field to record any delay of more than three days in reassignment when a participant has ended one host agency assignment but has not yet begun another.
- You can enter multiple breaks in participation for a single assignment.
- Because leaves of absence affect eligibility and performance, the various fields that establish a valid break in participation are subject to data validation.

11.1. Assignment. Because a participant can have multiple breaks in a single assignment or in multiple assignments, each break must be separately entered on the appropriate assignment. If there are multiple assignments, you must select the correct assignment from the dropdown.

11.2. Approved Break Start Date. Enter the first date of the break in this field.

11.3. Expected End Date. If known, enter the expected end date. If you are uncertain about the end date, it is a good idea to enter a date that is reasonable under the circumstances. The GPMS will send you a notification if the participant exceeds this date. You may update this date at any time.

11.4. Actual End Date. Enter the date on which the participant's break ended. This date must be on or after the start date and the expected end date.

11.5. Is Documentation Provided? SCSEP rules do not require that documentation is required, but grantees may have reasonable rules for breaks that require documentation in some circumstances. Indicate here if documentation was provided.

IV. APPROVED BREAKS

11.6 and 11.7. Reason for Approved Break in Participation. Select the primary reason for the approved break under the grantee's policy. If you select "Other," enter a brief statement of the reason.

11.8. Comments. You may enter here any comments pertaining to the approved break.

V. TRAINING AND SERVICES

V. TRAINING AND SERVICES

Add New Service

12 General Details

Assignment*

Assignment Date - 10/01/2022

Select an Assignment

Assignment Date - 10/01/2022

Assignment Date - 11/01/2021

12.1 Category*

Education and Training

Pick a category

Education and Training

Supportive Services

12.2 Type*

Educational Remediation and Literacy

Pick a category

Apprenticeship Training

Computer Training (e.g., Computer Literacy Training)

Educational Remediation and Literacy

General Training (Basic Skills)

On-the-Job-Experience (OJE)

Other (Specify)

Specialized Training (Specific Job/Industry)

12.3 Sub-Category*

--- Please select a value ---

--- Please select a value ---

Adult Education

ESL

Other

12.4 Other Type*

12.5 Category*

Supportive Services

Pick a category

Education and Training

Supportive Services

12.6 Type*

Other (Specify)

Pick a category

Dependent Care (e.g., Child or Adult Care Assistance)

Educational or Occupational Licensing and Testing Fees

Food Assistance

Health and Medical Services (e.g., RX, Eye Glasses, Medical Test)

Housing (e.g., Temporary Housing Assistance)

Needs-related Payment (e.g., Utilities)

Other (Specify)

Special Job-related or Personal Counseling

Transportation Assistance

Work Related Assistance (e.g., Uniform, Badges, Tools)

12.7 Other Type*

V. Training and Services. At any time after the participant has been assigned, you must use this section of the GPMS to record Education and Training and Supportive Services provided to the participant. Once the participant has exited, you can no longer provide Education and Training, but you can provide specified Follow-up Services, as well as Supportive Services during the first 12 months of placement. The GPMS limits the types of services available on these screens based on the status of the participant. The screen shot above is based on a participant in active status.

12. Assignment. As with an approved break, Employment and Training and Supportive Services must be associated with a specific assignment or placement. A participant can receive multiple services at each of multiple assignments, but you must enter each instance separately.

12.1. and 12.5. Category. Each service in the Training and Services module has a category and a type. Select in these fields either of the two categories available to active participants.

12.2/12.6 and 12.3/12.4/12.7. Type. Select the corresponding type from the dropdown in fields 12.2 and 12.6. If you select (Other), you must specify the type in fields 12.4 and 12.7. Wherever possible, select one of the listed types rather than "Other." Doing so will enable more complete and accurate reporting of Training and Services provided.

- Some types in fields 12.2 and 12.6 may generate sub-categories in fields 12.3 and 12.7
- Other types in fields 12.2 and 12.6 may cause additional fields to be displayed

V. TRAINING AND SERVICES

13 Service Details

13.1 Start Date * 

13.2 Expected End Date 

13.3 Actual End Date 

13.4 Is this a One Day Service? * ☒ Yes ☐ No

13.5 Comments

14 Additional Fields

Service Provider *

14.1 State **14.2** City **14.3** Organization Name

Agency ID	Name	FEIN	Address	Primary Contact
No Organization Agencies Available				

14.4 Supportive Service Provided By * ☐ Grantee or sub-recipient/local project
☐ Workforce partner
☒ Other
☐ Both i and ii
☐ Both i and iii

14.5 Other (Specify) *

14.6 Hours Per Week *

14.7 Hourly Training Wages *

13. Service Details. These fields appear for all services regardless of the category or type selected.

13.1-13.4. Dates of Service. As with approved break in participation, enter the date on which the service began, the expected end date, and the actual end date.

- If known, also enter the expected end date. If you are uncertain about the end date, it is a good idea to enter a date that is reasonable under the circumstances. The GPMS will send you a notification if the participant exceeds this date. You may update this date at any time.
- At the conclusion of the service, you must enter the date on which the service ended. This date must be on or after the start date and the expected end date.
- If the service will be concluded in one day, check “Yes” in field 13.4. The GPMS will then auto-fill field 13.3 with the date in field 13.1

13.5. Comments. You may enter here any comments pertaining to the specific services provided.

14. Additional Fields. Depending on the category and type selected above, the GPMS may display additional fields or make some Service Detail fields conditionally required. For example, Service Provider is required for all Education and Training services but is optional for Supportive Services; conversely, Supportive Services require additional information that is not displayed for Education and Training; hours per week and hourly training wage are required when OJE is selected.

14.1-14.3. Service Provider. As with host agencies and employers, enter the name, city, and state of the entity providing the service and click “Search.” The GPMS will return a list of all organizations in the city and state that match or may match the entity you are seeking. If the list contains the entity you want, you must select it. The system will not allow you to enter a duplicate entity. If the entity you want is not listed, click on “Add New Service Provider” and fill out the fields required.

- Remember, an existing entity can be used as all three types: host agency, service provider, and employer. Whenever possible, use an existing entity by assigning an additional type to it rather than creating a new entity.

V. TRAINING AND SERVICES

14.4-14.5 Supportive Services Provided By. Although grantees are required to assess all participant's needs for supportive services and may provide such services themselves, to the extent feasible, grantees are required to have other community partners provide or pay for such services. You must indicate the type of entity providing or paying for the specific supportive service entered. You may select only one value.

14.6/14.7. Hours Per Week/Hourly Training Wages. These fields are displayed when OJE is selected in field 12.2.

VI. PAID HOURS

VI. PAID HOURS (Revised, Version 1.1)

15 Total Hours Paid in Quarter

15.1 Program Year

Host Agency Name	Assignment Start Date	Assignment End Date	Program Year	Total Hours	Q1	Q2	Q3	Q4
American Job Center	10/01/2022		2022	15.2 PRA Activities		1		
				15.3 Paid Training (In Person)				
				15.4 Paid Training (Remote)				
				15.5 Paid CSA (In Person)				
				15.6 Paid CSA (Remote)				
				15.7 Paid Sick Leave				
				15.8 Total Hours	0	0	0	0

VI. Paid Hours. Payment of wages to the participant is only recorded in the GPMS if paid directly to the participant or indirectly through an OJE in which the employer is reimbursed by the grantee. It does not include wages or stipends paid by workforce or community partners. As was true with SPARQ, there are two ways to enter paid hours into the system: in the record of an individual participant or through a bulk-entry utility that shows all participants for a given quarter. This screen shot shows the first method. See the topics in the Appendix for detailed information about paid training.

- For any quarter and type of wages, you may enter the wages earned in that quarter or *paid* in that quarter. Whichever method you use must be applied uniformly and consistently throughout the program year.
- If the participant for whom you are entering hours has had multiple assignments during the program year, each assignment will be listed in a separate row. You may enter values for any one or more of the assignments for the relevant quarter; however, in the individual record method, you will need to enter separately the hours for a quarter in each assignment the participant had in that quarter. Do not combine the hours and enter the total into a single assignment.
- Unlike SPARQ, you must enter each type of paid hours separately. Grantees may need to modify their payroll systems to track each type of paid training separately.
- If there were no paid hours for a category, enter 0.
- Also unlike SPARQ, you need to enter hours paid for in-person and remote activities separately.
- The total paid hours will be auto-filled by the system in field 15.7.
- The types of paid hours are the same in both the individual participant records and the bulk-entry utility.
- You may enter time in whole hour increments. Use normal rounding rules: Anything .5 or higher is rounded up; anything less than .5 is rounded down. In a future release of the GPMS, you will be able to enter half hour increments.

15.1. Program Year (New field, Version 1.1). Select the program year from the dropdown. The dropdown contains the current and immediately prior program year.

15.2. PRA Activities. By statute, the PRA activities are required for all participants, and participant time spent on these activities must be paid. See Section III above for details on PRA activities.

15.3./15.4. Paid Training (In-Person/Remote)

- Enter the total number of hours of **paid** training that the sub-grantee provided, directly or through a training provider, to the participant. Do not put any paid time into these fields except that spent in additional, paid training provided by the grantee or sub-grantee rather than by the host agency. Do not include as paid training routine grantee or sub-grantee meetings. Paid training should be identified in the participant's IEP. See the topics in the Appendix for more information on paid training.
- Enter the number of hours of in-person paid training in field 15.3 and the number of hours of remote paid training in field 15.4.

VI. PAID HOURS

5.5/15.6. Paid CSA (In-Person/Remote). All time at the community service assignment must be paid. Enter the number of hours of in-person CSA in field 15.5 and the number of hours of remote CSA in field 15.6.

15.7. Paid Sick Leave Hours. Enter in this field all hours of sick leave for which the participant was paid under the grantee's leave policy during the quarter. If the participant was compensated for sick time by receiving additional CSA hours, that time should be reported under paid CSA hours, not paid sick leave.

15.8. Total Hours. The GPMS will total all of the hours entered into the fields above and auto-fill the total hours in this field. See the topics in the Appendix for detailed information about the maximum number of paid hours.

VII. PAID HOURS UTILITY

VII. PAID HOURS UTILITY

16 Required Filters

Required Filters			
16.1	Grantee *	16.2	Sub-Grantee *
	Older Workers Association		OWA California
		16.3	Program Year *
			2022

17 Optional Filters

Optional Filters			
17.1	Status	17.2	Participant ID
	Select one or more Status		
17.3	Case Assigned To	17.4	Participant Name ?
	owatraining3+owacm1@gmail.com owatraining3+owacm1@gmail.com		
17.5	Host Agency		
	Organization Name		
	Begin typing to search for an Organization		
	Enrollment		Exit
17.6	From	17.7	To
	mm/dd/yyyy		mm/dd/yyyy
		17.8	From
			mm/dd/yyyy
		17.9	To
			mm/dd/yyyy

18 Paid Hours Configuration

Paid Hours Configuration	
NOTE	
Categories of hours not provided by your organization to any participant in the quarter selected. For any category that you check below, 0 hours will be entered for all participants	
18.1	18.2
Category *	Quarter *
☐ PRA Activities	Select Quarter
☐ Paid Training (In Person)	Select Quarter
☐ Paid Training (Remote)	1
☐ Paid CSA (In Person)	2
☐ Paid CSA (Remote)	3
☐ Paid Sick Leave	4

VIB. Paid Hours Utility. As with SPARQ, you can bulk-enter all of the paid hours for a quarter by using the utility. It is located in the Administrative Console.

- 16.1-16.3. You must select the grantee, sub-grantee, and program year in these fields.
- 17.1-17.9. You may use these optional filters to narrow the list in a variety of ways. For example, you can select an individual case manager, host agency, or participant. You can also filter status, enrollment dates, or exit dates.
- 18.1/18.2. In these fields, you can indicate the types of hours for which you provided no paid hours during a quarter. The GPMS will auto-fill 0 hours for these types of hours, avoiding the need for you to enter 0 manually in all records.

GPMS DATA COLLECTION HANDBOOK
 ASSIGNMENT: Assignment Details, Add New Host Agency,
 Participant Required Actions, Approved Breaks, Training and Services, Paid Hours

VII. PAID HOURS UTILITY

19 Total Hours Paid in Quarter

Participant Name	Participant ID	Host Agency Name	Assignment Start Date	Assignment End Date	Program Year	Total Hours	Q1	Q2	Q3	Q4
Brown, Karen	CMS010004879	Digital Divide	10/06/2022	10/13/2022	2022	PRA Activities		0		
						Paid Training (In Person)		0		
						Paid Training (Remote)		0		
						Paid CSA (In Person)		29		
						Paid CSA (Remote)		0		
						Paid Sick Leave		0		
						Total Hours	0	29	0	0
Brown, Karen	CMS010004879	Digital Century	10/14/2022	10/28/2022	2022	PRA Activities		0		
						Paid Training (In Person)		0		
						Paid Training (Remote)		0		
						Paid CSA (In Person)		156		
						Paid CSA (Remote)		0		
						Paid Sick Leave		0		
						Total Hours	0	156	0	0
Miller, Barney	CMS010004223	Digital Century	07/06/2020		2022	PRA Activities	1	0		
						Paid Training (In Person)	0	0		
						Paid Training (Remote)	0	0		
						Paid CSA (In Person)	228	229		
						Paid CSA (Remote)	0	0		
						Paid Sick Leave	0	0		
						Total Hours	229	229	0	0

19. Total Hours Paid in Quarter

- The utility will list by participant and host agency the participants who meet your parameters. If a participant has multiple assignments or enrollments, each will be listed in a separate row.
- The types of hours and the rules for recording those hours are the same as for an individual participant record in fields 15-15.7 above.