Fresno Regional Workforce Development Board

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2125 Kern Street, Suite 208 • Fresno, California 93721 • 559.490.7100 • Fax 559.490.7199 •
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Blake Konczal, Executive Director

OPERATIONAL DIRECTIVE

FRWDB OD # 26-18	**Date Released: August 22, 2018**

To: All Fresno Regional Workforce Development Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: August 22, 2018

Subject: CalJOBS Data Entry Requirements and Data Changes

Applicable Program: All

Revision History: Initial Release

This Operational Directive (OD) supersedes OD 02-16, State Data Change Request Process, OD 15-12, I-Train Data Change Request, 20-04, I-Train Data Entry Requirements, effective July 1, 2018.

DATA ENTRY TIMELINESS

All data (including case notes) must be entered into CalJOBS within three (3) business days of when the activity(ies) took place.

DATA CHANGES

Within CalJOBS, provider staff have the capability to make several data changes on their own. In the event provider staff are unable to make a data change due to timeliness or permissions, a data change request must be submitted.

There are multiple forms to be used for data changes depending on the change needed.

Local Requests

Local only data changes are submitted using Form# TEC-002, Data Change Request. This form has three sections that must be completed by Provider staff and management.

1. Requesting Agency

    o   Date of Request – the date you are submitting the request to the FRWDB

    o   Agency Name – the name of the submitting agency

    o   Name of Requesting Staff – the staff person who is submitting the change request

    o   Name of Supervisor & Initials – the name of the approving supervisor and electronic initials

2. Participant Identifiers

- o Name – the name of the participant for which the change is being made.
- o State ID Number – the CalJOBS state ID number that identifies the participant.
- o WIOA App Number – the CalJOBS WIOA App number that identifies the participant's WIOA participation.

3. Request Details

- o This is a narrative section that must have the following information:
  - ▪ Detailed information about what is to be changed. The information must provide enough detail to identify which form, activity, field, and old & new values are to be changed. If an activity is being changed, the incorrect and corrected Projected or Actual Begin and Projected End dates must be provided.
  - ▪ An explanation of why the data is incorrect and needs to be changed and what processes or procedures are in place or being put in place to mitigate repeated errors of this type.
  - ▪ The Provider Program Manager must sign (electronically) the request.

<u>State Requests</u>

State Data Requests are submitted if the MIS Administrator is unable to complete the local request.

It is important to note that Activities will system close 30 days after the projected end date. Activities that have a "System Closed" status are included in performance. Activities that are System Closed <u>WILL NOT BE CHANGED</u>. Therefore it is critical that staff utilize the alert functions within CalJOBS to keep track of projected end dates to avoid a System Close occurrence.

Service Provider management will be informed of when they need to submit a State Data Change Request. If it becomes necessary to submit the request, the WIOA State Data Change Request Form must be used. The following fields must be completed by Service Provider Management.

- Section I
  - o Date of Request – the date that this request is submitted to FRWDB.
  - o Requestor name, email, and phone number – Service Provider Program Manager Name, email and phone number.

- Section II
  - o The "Choose an Item" field is a drop-down field with multiple selections. Choose the selection that best fits the request. If one doesn't fit, choose Other. Note – The term "Enrollments" in the selections are synonymous with Activities or Services.
  - o In the space after "Choose an Item", you must provide the same information as required in the local request explaining the change needed, how it occurred, and what is being done to mitigate future errors of this type, in addition to the name and WIOA App number of the participant.
  - o You may provide up to three separate changes on each form.

- Section III
  - o The Service Provider Program Manager must sign (electronically)

The State Data Request is also reviewed and signed by the MIS Administrator and the Fresno Regional Workforce Development Board Executive Director.

<u>Supplemental Form</u>

The state provided Supplemental Form is used when there are too many requests to fit on the State Data Request form (more than three). Additionally, this form is used for Local Data Change Requests (Form# TEC-002) if there are too many requests to fit on the Local Data Request. The form has multiple columns requesting information. Complete the fields that are applicable.

- Application # - This is the WIOA application number from CalJOBS

- Program Name – for our purposes this will always be Title I Workforce Services.

- State ID from CalJOBS

- Last & First name of participant

- Grant Code – this is if a special grant is involved

- Activity Code

- Incorrect and Correct dates – these are the dates that need to be changed and to what they will be changed. If dates aren't being changed, only complete the "correct" date columns. This will help to further identify the specific activity.

- Comments/Instructions – direction for what is to be changed.

All requests for data changes must go to the FRWDB Program Manager & the Deputy Director of Information Systems via email.

**<u>Under no circumstances is MIS staff to be contacted directly by provider staff
to make data changes.</u>**

In the event a Data Change Request requires State intervention, the State Data Request must be completed and sent to the FRWDB DDIS.

If any questions, please contact the FRWDB Deputy Director of Information Systems.

Forms: TEC-002, Data Change Request Form
         WIOA State Data Change Request
         Data Change Supplemental