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August 14, 2018

To: WIOA Subrecipients of the Orange County
Development Area

From: Brian Rayburn
Interim Director 

**Subject: CalJOBS Data Change Request Form
Information Notice No. 18-OCDB-01**

PURPOSE

This policy provides the guidance and establishes the procedures regarding the CalJOBS Data Change Request (DCR) form. This policy applies to Workforce Innovation and Opportunity Act (WIOA) Title I subrecipients, as well as other staff who input data into CalJOBS.

REFERENCES

- WIOA (Public Law 113-128)
- State Workforce Services Directive WSD18-02, Data Change Request Form Procedure
- Department of Labor (DOL) Training and Employment Guidance Letter (TEGL) 10-16, Change 1 Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs (August 23, 2017)

EFFECTIVE DATE

This policy is effective immediately upon issuance.

BACKGROUND:

WIOA Title I Adult, Dislocated Worker, Youth, and National Dislocated Worker Grant subrecipients are required to report participant information via the CalJOBS system. Managers, staff, and Management Information System (MIS) Administrators have the ability to change active participant data. After 30 calendar days, the CalJOBS system does not allow certain areas of the participant record to be changed or updated by managers, staff, or MIS Administrators. The DCR form is a tool to enable the participant data to be changed or updated. Its purpose is to correct data key entry errors and other circumstances that are beyond the control of staff.

POLICY AND PROCEDURES

The DCR form is intended to maintain data integrity, promote consistent and accurate data in the DOL Quarterly and Annual reports, and enable performance to be properly calculated.



**ORANGE COUNTY
DEVELOPMENT BOARD**

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Data within the program application cannot be updated or changed once the individual becomes a participant in the program. It is the staff's responsibility to ensure that all application data is updated prior to enrolling an individual. If additional program eligibility is added to the application, only new data associated to that program can be added to the application.

Subrecipients must ensure records are updated within 30 calendar days of the activity's Projected End Date/Scheduled Date to avoid a "System Closed" completion status. Once the activity becomes "System Closed," the data cannot be changed or updated. Activities with a "System Closed" completion status are included in performance calculations.

Subrecipients have access to change data within 30 days of the activity's Actual End Date.

A participant's application is system exited after 90 calendar days of inactivity across all programs within CalJOBS, and when no new activity has been projected or scheduled for the participant. If services (except post-program/follow-up services) need to be provided to an applicant who has been system exited, the application intake process must be completed again. Participants who repeat the application intake process will have their new enrollment counted separately in performance calculations.

If any data needs to be added or changed after 30 days, the DCR form must be completed and submitted to the OCDB via email at cidmis@occr.ocgov.com. All correspondence should include "**Data Change Request**" in the subject line. Any requests associated to data beyond 90 days will be reviewed on a case-by-case basis and may not be approved.

Upon receipt of a fully completed DCR form, OCDB staff will review the request and analyze the overall impact of the proposed change, especially with respect to current WIOA performance outcomes. Each request will be considered on a case-by-case basis, contingent upon the detailed reasons listed, and the supporting documentation provided. If additional information is required, OCDB staff will email the staff for clarification. The staff is required to reply within seven calendar days. The reply must include the entire email stream and all attachments.

Technical Assistance may be provided to subrecipients with excessive DCRs.

If the DCR is approved, the OCDB staff will ask the State to make the requested changes and respond to the subrecipient. It is the staff's responsibility to verify that the changes made by the State are accurate. If the DCR is denied, the OCDB staff will notify the subrecipient office and explain the reason(s) for the denial.

A blank, downloadable DCR form for WIOA subrecipients can be found in Attachment II.

Any request without a detailed reason or explanation as to why the change needs to occur will be denied. All applicable documentation must accompany the request.

Requests for multiple changes must be listed on the DCR Supplemental Spreadsheet. The spreadsheet must include, at minimum, the program name, application number, participant's last and first names, and an explanation of what needs to be corrected.

The DCR Supplemental Spreadsheet should be submitted in its original format (not in a pdf or any other format), and must always be accompanied by the signed DCR.

A blank, downloadable DCR Supplemental Spreadsheet can be found in Attachment III.

For subrecipients, the signatures of the requestor and Executive Director or designee are required. This enables the Executive Directors to be aware of the nature and number of data changes that are requested. Any request lacking the required authorized signatures will be denied.

Please note that requests that arise out of a result of not adhering to the data entry procedures as outlined in OCDB Information Notice 14-OCWDA-05 – CalJOBS Participant Reporting Timeline, may be denied. Data Change Requests to the OCDB will be denied if reason is due to simple failure to submit data. Failure to adhere to 14-OCWDA-05 may result in cash holds or de-obligation of funds.

ACTION

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

INQUIRIES

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

ATTACHMENTS

Attachment I – Instructions

Attachment II – DCR Form

Attachment III – DCR Supplemental Spreadsheet



Orange County Development Board

CalJOBS Data Change Request Form

1. **Date of Request** – Indicate the submission date of the request.
2. **Name of Agency** – Indicate the requesting agency name.
3. **Requestor** – Indicate the name of the staff requesting the data change.
4. **Requestor Phone** – Indicate the phone number of the staff listed in item #3.
5. **Requestor E-mail** – Indicate the e-mail address of the staff listed in item #3.
6. **Client's Last Name** – Indicate the client's last name.
7. **WIOA App ID** – Indicate the client's WIOA Application number. The request and/or corresponding documentation should not include participants' Social Security Numbers.
8. **Has the client already soft exited from the system? Yes or No** – Indicate whether or not the client as already soft exited from CalJOBS.
9. **If yes, date of soft exit** – Indicate the soft exit date of the client, if applicable.
10. **Description of corrective action requested** - Indicate the specific elements that require correction. Be sure to include the following: Client's Last Name, WIOA App ID and Program/Grant. Please be as detailed as possible. If the request does not fit, please use Attachment III.
11. **Justification and potential impact to agency if the correction is not made** – Provide a justification as to why the change is necessary. In addition, any documentation that will support the justification for the data change can be included as a separate attachment.
12. **Corrective action taken to avoid similar corrections** – Indicate the corrective action taken internally to ensure similar corrections are submitted to the OCDB.
13. **Authorized Signatures** – Any request lacking the authorized signature(s) will not be approved.

*Please note that a participant's full Social Security Number should **never** be included.*

Requests should be submitted to the OCDB electronically, via the following email address: cidmis@occr.ocgov.com with the subject line "Data Change Request".



Orange County Development Board

CalJOBS Data Change Request Form

REQUESTOR IDENTIFYING INFORMATION

DATE OF REQUEST:

NAME OF AGENCY:

REQUESTOR:

REQUESTOR PHONE:

REQUESTOR E-MAIL:

DETAILED REASON FOR REQUESTED CORRECTION

DESCRIPTION OF CORRECTIVE ACTION REQUESTED (Please be as detailed as possible):

JUSTIFICATION AND POTENTIAL IMPACT TO AGENCY IF THE CORRECTION IS NOT MADE:

CORRECTIVE ACTION TAKEN TO AVOID SIMILAR CORRECTIONS:

AUTHORIZED SIGNATURES

SIGNATURE OF REQUESTOR _____

SIGNATURE OF DIRECTOR (OR PROGRAM DESIGNEE) _____

IF ADDITIONAL SPACE IS NEEDED, PLEASE SUBMIT ANOTHER ATTACHMENT.

OCDB USE ONLY

STAFF ASSIGNED _____ DATE _____

Approve Deny

DCR # _____

Requests should be submitted to the OCDB electronically, via the following email address: cidmis@occr.ocgov.com with the subject line "Request to Change Previously Submitted CalJOBS Data".

