

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

DIRECTIVE NO.	EFFECTIVE DATE	APPLICABILITY	PAGE
24-24	April 9, 2025	CMD, GMD	1 of 5
SUBJECT: CALJOBS DATA CHANGE REQUESTS			

I. PURPOSE

The purpose of this directive is to establish policies and procedures providing guidance regarding the CalJOBS data change request process.

II. GENERAL INFORMATION

WIOA Title I Adult, Dislocated Worker, Youth, and National Dislocated Worker Grant subrecipients, and Employment Development Department (EDD) Workforce Services Branch (WSB) staff are required to report participant information via the CalJOBS system. Managers, staff, and Management Information System (MIS) Administrators can change or edit active participant data with some limitations. 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 Data Change Request (DCR) form is a tool to enable the participant data to be changed or updated.

- [WSD18-02, Data Change Request Form Procedure \(July 31, 2018\)](#)
- [EEDD PPD 24-15, Entering Program Services and Performance Information \(November 15, 2024\)](#)

III. POLICY

The DCR form is intended to maintain data integrity, promote consistent and accurate data in the Department of Labor (DOL) Quarterly and Annual reports and enable performance to be properly calculated. Its purpose is to correct data key entry errors and other circumstances that are beyond the control of staff. Staff is responsible for ensuring that information entered in CalJOBS is accurate.

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 accurate prior to enrolling an individual. The only time a program application can be updated is when additional program eligibility is being determined. Only new data associated with that program eligibility can be added to the application.

EEDD staff and 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. While CalJOBS allows 30 calendar days, EEDD best practice is for staff to update information in CalJOBS daily. 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. Staff should refer to [PPD 24-15, Entering Program Services and Performance Information](#) for a detailed description of the requirements related to entering CalJOBS activity codes and ask their supervisor if they have any questions.

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 scheduled for the participant in CalJOBS. 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, staff must complete the DCR form (Attachment 1) and submit it to their supervisor. The supervisor will review the form, and if it is deemed necessary and complete, will forward it to the designated MIS Administrator. The MIS Administrator will verify that the form complies with this policy and then submit it to the EDD Program Reporting and Analysis Unit (PRAU) for review, while also carbon copying the Executive Director, Division Manager, Supervisor, and requesting staff. Any requests to change data more than 90 days old will be reviewed on a case-by-case basis and may not be approved.

Upon receiving a DCR form, the PRAU 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, the PRAU will email the MIS Administrator for clarification. The MIS Administrator must reply to the PRAU message within seven calendar days, or the request may be denied.

Accurate data is essential for program performance outcomes, and it is the responsibility of staff to enter program services and performance information accurately and in accordance with EEDD policy. If a DCR is approved, PRAU will

make the requested changes and notify the MIS Administrator. It is the requestor's responsibility to verify that the changes made by PRAU are accurate and to document any changes with a case note. If the DCR is denied, PRAU will notify the MIS Administrator and provide the reasons for the denial. The requestor will then document the denial and upload any necessary supporting documentation. If a denied DCR involves multiple participants, the supporting documentation must be uploaded to each participant's file, with references to other participants redacted.

IV. PROCEDURE

If EEDD staff determines that a DCR is required, they must complete the DCR form (Attachment 1) or the DCR Supplemental Spreadsheet (Attachment 2), if more than three changes are necessary, and send it to their supervisor. These forms are available for download as attachments to [WSD18-02](#). The supervisor will review the form, and if it is determined that the data change is warranted, will submit it to the designated MIS Administrator. The MIS Administrator will review the form to ensure it was completed in accordance with this policy. If it was not, it will be returned to the supervisor for revision. Once the DCR is complete, the MIS Administrator will submit it to PRAU for review and staff will document the outcome in CalJOBS.

Completing the DCR Form

Section I – Requestor's Identifying Information

This form's top section requests general information items.

Title I Sub-Recipient Form:

- Date of Request:
- Subrecipient: **San Joaquin County EEDD**
- MIS Administrator:
- Requestor:
- Requestor's Email Address:
- Requestor's Phone Number:

Section II – Detailed Reason for Requested Correction Section

The form's middle section solicits the specific details necessary to complete the request. Information entered on the DCR should not attempt to place blame or excuse why an error was made. The purpose of this form is to maintain data integrity, promote consistent and accurate data by correcting data key entry errors and other circumstances that are beyond the control of staff. Staff is responsible for ensuring that information entered in CalJOBS is accurate.

To complete this section:

- Select the reason for the request from the “Choose An Item” drop-down window.
- Enter the participant’s name, program name, Application number, and State ID number (Do not include social security numbers.)
- Enter the details of the requested correction. If the request relates to an activity code, and there are multiple activity codes of the same number, specify the start and end dates of the activity code that needs to be corrected. If the correction involves Youth activity codes, the school status of the participant is also required.
- Include references to, and attach, any documentation necessary for PRAU staff to understand the need for the change.
- Cite the policies and procedures that staff will follow to avoid similar errors from recurring. The DCR form should cite specific EEDD policies and procedures (PPDs). If unsure which policies relate to the DCR, staff must contact their supervisor or manager.

If an application needs to be reopened to add a service, state in this section that the “Closure” and “Exit” need to be deleted as entering new data will require the application to be reopened. Staff will also need to specify if the application will be kept open, or if it needs to be closed once the change is applied. Follow-up information may be deleted upon a case reopening. If a case is reopened and there are follow-up case notes, said case notes must be updated to reflect the case has been reopened and state the reason for said reopening.

A single DCR form can accommodate up to three participants, or three different data changes. Requests for more than three data changes must be listed on the DCR Supplemental Spreadsheet (Attachment 2). The spreadsheet must include, at minimum, the program name, Application number, State ID, participant’s first and last names, and an explanation of what needs to be corrected. The DCR Supplemental Spreadsheet should be submitted in its original Excel format (not in pdf or any other format) and must always be accompanied by the signed DCR form.

A DCR submitted to the MIS Administrator that is not in accordance with these procedures will be returned to the supervisor for revision. All applicable documentation must accompany the request.

Section III – Authorized Signatures Section

Staff will sign the "Authorized Signature of Requestor" section and submit the DCR form to their supervisor for review. If approved, the supervisor will forward the form to the MIS Administrator for further review. If the MIS Administrator finds that the form needs revisions, they will return it to the supervisor with an explanation of the

required changes. Once the MIS Administrator confirms that the form meets policy requirements, they will sign it, obtain the Executive Director's signature, and then submit the form for PRAU review. A carbon copy of the form will be sent to the Executive Director, Division Manager, Supervisor, and requesting staff. Since the MIS Administrator is the designated point of contact with PRAU, other EEDD staff should not communicate with PRAU directly, even when included in communications.

Upon PRAU Review of the Data Change Request Form

If the DCR is approved, the PRAU will make the requested changes and respond to the MIS Administrator for verification. The MIS Administrator will ask the requestor to confirm that the changes were made as requested. It is the requestor's responsibility to verify that the changes made by the PRAU are accurate within the time frame allotted by PRAU. Upon notification of approval of a DCR, staff must enter a case note, explaining the change that was made.

If the DCR is denied, PRAU will notify the MIS Administrator and provide the reason(s) for the denial. The requestor must then enter a case note stating that the DCR form was submitted and denied. Additionally, staff must upload the denial email and the DCR form to CalJOBS. If the denied DCR involves multiple participants, the requestor(s) must enter a case note and upload the documentation to each participant's file, ensuring that any references to other participants are redacted.

V. QUESTIONS REGARDING THIS DIRECTIVE

May be referred to the Executive Director 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
EXECUTIVE DIRECTOR

PV:df

Attachment 1: Data Change Request Form

Attachment 2: Data Change Request Supplemental Spreadsheet

To: Program Reporting and Analysis Unit
 E-Mail: WSBManagePerformance@edd.ca.gov

DATA CHANGE REQUEST: WORKFORCE INNOVATION AND OPPORTUNITY ACT

I. Requestor Identifying Information Section

DATE OF REQUEST: _____

SUBRECIPIENT: _____

MIS ADMINISTRATOR: _____

REQUESTOR: _____

REQUESTOR'S EMAIL ADDRESS: _____

REQUESTOR'S PHONE NUMBER: _____

II. Detailed Reason for Requested Correction Section

Make the appropriate selection from the **(CHOOSE AN ITEM)** drop-down menu of what needs to be corrected. Include the applicant's name, program name, application number, and policy and procedure that staff will follow to avoid similar errors from reoccurring. Provide additional documentation as an attachment if needed. If submitting a DCR for more than three individuals or changes, additional participants or changes must be listed separately on an Excel spreadsheet. **Do not send complete Social Security numbers.**

CHOOSE AN ITEM

CHOOSE AN ITEM

CHOOSE AN ITEM

III. Authorized Signature Section

AUTHORIZED SIGNATURE OF REQUESTOR	DATE:
AUTHORIZED SIGNATURE OF MIS ADMINISTRATOR	DATE:
AUTHORIZED SIGNATURE OF EXECUTIVE DIRECTOR (OR PROGRAM DESIGNEE)	DATE:

Accompanying Spreadsheet for the DCR Form

[illegible]