

OPERATIONS MANUAL CHAPTER 5: CALJOBS DATA ENTRY POLICIES AND PROCEDURES

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I. INTRODUCTION

A. PURPOSE

The purpose of this chapter is to provide guidance to the San Diego Workforce Partnership (SDWP) subrecipients on data entry policies and procedures specifically for the California Job Openings Browse System (CalJOBS) and other internal reporting systems (i.e. Filemaker, Salesforce, etc). CalJOBS is used by State of California Employment Development Department (EDD) to submit required reports to the Department of Labor (DOL) for Workforce Innovation and Opportunity Act (WIOA), Wagner-Peyser Act (W-PA) and Trade Adjustment Act (TAA) participant reporting requirements. SDWP may implement additional requirements in order to better inform the community, boards, and partners around data analysis and performance reporting.

B. CALJOBS STAFF ACCOUNTS

To gain access to CalJOBS, all users are required to have their own staff account created by a CalJOBS MIS Administrator. A supervisor must complete a Staff Change Request Form via the Partner Portal, under Resources and select Staff Changes. In the IT Information section, the supervisor will select all systems that the staff requires access to. On the Effective Start Date submitted, the staff member will receive the User's Oath of Confidentiality Form link via the email provided. The User's Oath of Confidentiality outlines the importance of confidentiality with sensitive participant data and the risk of criminal prosecution for any misconduct within the CalJOBS system. This form must be completed and signed by the staff member. Following the submission of the User's Oath of Confidentiality Form an email will be sent to the supervisor for approval of the account. Once all forms and approvals are completed, a CalJOBS MIS Admin will create or manage all approved accounts.

For any account modifications including Role Changes, Onboarding, Offboarding the same Staff Change Request Form must be submitted via the Partner Portal (https://portal.workforce.org/Partner/s/staff-change/Staff_Change_c/00B1N000005OImZUAS). All CalJOBS accounts are subject to final approval by SDWP and access to CalJOBS may be denied or revoked at the discretion of the SDWP.

Note: Refer to the Operations Manual Chapter 2: Contract Administration for Onboarding and Offboarding processes.

C. CALJOBS FORMS AND PROCEDURES HANDBOOK

The CalJOBS Forms and Procedures Handbook (previously Chapter 5 of the Operations Manual) is an instruction and guidance manual on how and where to enter required participant data in CalJOBS. The handbook is located in the Operations Resources section of the SDWP website (<https://workforce.org/operations/>).

The handbook is used to clarify the procedures for recording services provided to individuals and provides line item definitions for completing forms in CalJOBS. Many of the procedures covered in the handbook are basic daily functions and are provided for new staff learning the job, however, the handbook can also serve as a reference manual for experienced staff. The procedures and definitions outlined in the handbook are intended to support the service flow protocols established by the existing policies and procedures.

D. SOURCES FOR PARTICIPANT DATA REPORTING REQUIREMENTS

This policy guidance is based on the WIOA legislation, U.S. Department of Labor (DOL) regulations in the form of the WIOA Final Rules, the WIOA Notice of Proposed Rulemaking (NPRM), Training and

Employment Guidance Letters (TEGL), EDD Workforce Services Directives (WSD), and EDD Workforce Services Information Notices (WSIN) related to these programs. The guidelines will be updated as necessary to reflect further guidance from the DOL, EDD or SDWP.

i. [DOL Final Rules Resources](#)

<https://www.dol.gov/agencies/eta/wioa/guidance>

ii. [DOL Notices of Proposed Rule-Making \(NPRM\)](#)

<https://www.dol.gov/WHD/#>

iii. [DOL Training and Employment Guidance Letters \(TEGL\)](#)

<https://wdr.doleta.gov/directives/>

iv. [EDD Workforce Services Directives \(WSD\)](#)

http://www.edd.ca.gov/jobs_and_training/Active_Directives.htm

v. [EDD Workforce Services Information Notices \(WSIN\)](#)

https://www.edd.ca.gov/jobs_and_training/Information_Notices.htm

II. ELIGIBILITY

A. COLLECTION OF MEDICAL INFORMATION

While collection and data entry of medical information, including disability-related information, may be required, the documentation shall be marked as PII in the Workforce eFile and shall not be recorded as data entry on CalJOBS. When asking any question that could lead to the disclosure of a disability (including, but not limited to: an individual with a disability requesting an accommodation, headaches, allergies, addiction, etc.) the Subrecipient must follow the following steps to ensure privacy and confidentiality of the information.

Collection of Medical Information Process

- Complete any required forms to document the WIOA program activity;
- If there is medical or disability-related information indicated on any of the forms/documents, those forms/documents must be kept in the secure location in Workforce eFile by checking “***This document contains Personally Identifiable Information (Medical, SSN, etc.)***” or if the forms/documents are uploaded into CalJOBS, the PII file would remain secure.

Note: Case notes, printed or not, and any other documentation cannot include medical or disability-related information, including, but not limited to using the following words: “medical file, disability, reasonable accommodation, SSDI,” or anything related. Any printed materials in the participant’s case file, or electronic case notes in CalJOBS that include medical or disability related information will be considered a finding.

Refer to [SDWP Operations Manual, Chapter 4 and Chapter 7](#) for specific information regarding collection to and access of medical information within each program.

B. SOCIAL SECURITY NUMBER

A Social Security number is used for data validation purposes only. If individuals are unable or refuse to provide a SSN, a pseudo-SSN may be assigned during the WIOA application process.

Utilization of a Pseudo SSN Process

- Create a pseudo social security number
 - The directions can be found in the CalJOBS Forms and Procedures Handbook - CalJOBS Registration
- Notify your Contract Administrator and copy CalJOBS@workforce.org that you plan to use a pseudo-SSN

Note: If a participant is enrolled using a Pseudo SSN, they will need to provide additional documentation in order to participate in work experience or other trainings.

The information above has been taken from EDD [Directive WSD20-11](#).

C. PROCEDURES FOR EXITING INELIGIBLE PARTICIPANTS

Each subrecipient is responsible for taking immediate action to exit participants who, subsequent to enrollment, are discovered to be ineligible due to having established WIOA Title I eligibility by providing false information or fabricated documentation, as well as anyone who is found ineligible during a subsequent monitoring review, due to staff error.

Exiting Ineligible Participants Process

- Notify your Contract Administrator, copy CalJOBS@workforce.org and include the participant's WIOA application ID number
- Complete a closure form
 - Add a case note to the closure form with details of why the participant was found to be ineligible

Note: Exiting ineligible participants will not remove them from the performance metrics.

III. WIOA TITLE I PARTICIPATION & ACTIVITIES



A. CALJOBS INDIVIDUAL REGISTRATION

The CalJOBS registration begins an information collection process and is used to help manage the individual, create resumes, enroll the individual in programs, and provide services. An individual must be registered in CalJOBS before a program staff can start the WIOA Title I Application for enrollment into grant funded program services.

B. WIOA TITLE I APPLICATION

After the individual registration has been completed in CalJOBS, the WIOA Title I Application must be completed in order for the individual to receive grant funded program services. This application is used primarily to record information necessary to calculate eligibility for grant funded program services. The information is also important for capturing characteristics and barrier information that can be used to describe the populations served by WIOA Title I programs.

1. Agency Codes

Subrecipients are required to assign Agency Codes to each individual WIOA Title I Application and to activities/enrollment/services. Agency codes will be used to help identify which subrecipient is responsible for the outcomes of the participant. Since CalJOBS does not systematically require the Agency Code field to be entered (i.e. the field is not noted with a red asterisks *), it will be the responsibility of the subrecipient to review WIOA Title I Applications to ensure this field has been entered correctly. Should the Agency Code be left blank or contain the wrong Agency Code, this will potentially impact performance calculations for the subrecipient resulting in participants not appearing in subrecipient reports. The Agency Code field should be filled in at first creation a new WIOA Title I Application.

Selecting Agency Code Data Entry Process

WIOA Title I Application

- Locate the Agency Code field
- Select the link “Select Agency Code”
- In the search field, type in Agency Name, select the Search button and select appropriate Agency Name
OR
Leave the search field blank and select the Search button
- From the resulting search list, select the appropriate Agency Name from the list using the link

Activity/enrollment/Service

- Locate the Agency Code field
- Select the link “Select Agency Code”
- In the search field, type in Agency Name, select the Search button and select appropriate Agency Name
OR
Leave the search field blank and select the Search button
- From the resulting search list, select the appropriate Agency Name from the list using the link

2. Accessing Grant Type

The WIOA Title I Application will be completed once the appropriate grant funded program(s) has been identified based on the individual’s general information and eligibility criteria. The WIOA Grant Eligibility section will provide a list of Grant Eligibilities including special grants the individual is eligible for. Once the appropriate Grant Type is selected, staff will be able to record the the program services under the correct Customer Program Group.

Accessing Grant ID Data Entry Process

To add the Title I Program

- Locate (Adult, Dislocated Worker, Youth) eligibility table
 - Row highlighted in green – Participant is eligible for the Title I Program
 - Row not highlighted – Participant is not eligible for the Title I Program

To add a special grant to a Title I Program (Adult, Dislocated Worker, Youth)

- From WIOA Grant Eligibility section
- Select “yes” for appropriate grant
- Grant Type(s) appear below after selection
- Select “Add” for appropriate grant to add to Title I Application
- Select “yes” to activate the special grant
- Finish Title I Application

To not include a Title I Program (Adult, Dislocated Worker, Youth)

- Click the radio button “Inactive” to not include grant code
 - By “inactivating” the customer group will prevent staff from selecting the incorrect grant when recording program enrollment services

C. PROGRAM PARTICIPATION & ENROLLMENT

The collection of performance measurements start at the time individual is enrolled into a grant funded program. Enrollment occurs once eligibility has been established, the WIOA Title I program application has been completed, and program participation has been entered in CalJOBS as the individual’s first program service. As part of the enrollment process, the WIOA Title I Participation Form and Activity Enrollment Form must be completed in CalJOBS. This will record the first service date and service related activity that was provided on the first day of the individual’s program funded service.

D. CO-ENROLLMENT/DUAL ENROLLMENT

Co-Enrollment/Dual Enrollment occurs when a Title I program participant is enrolled in one or more state or federal program. Subrecipients are responsible for ensuring that all services provided to participants that are co-enrolled in different programs are strategically provided and not duplicated. The WIOA Title I program will allow a participant to be co-enrolled in multiple programs and would allow staff flexibility to find and share the responsibility for the services that would help meet their goals and objectives while participating in the the grant funded program(s).

E. CAPTURING PROGRAM ACTIVITIES

Staff are required to record all program related services provided to participants throughout participation of the WIOA Title I program using the CalJOBS system. The services provided are referred to as Activity Codes in CalJOBS. Activity codes are the three-digit codes associated to each of the specified services. An activity case note must be attached to record the participant’s program service that was provided by staff. The illustration below will provide the data entry flow of Activity Codes associated with the services provided to the participant.



Adding An Activity Code Data Entry Process

- Select the “Create Activity/Service/Enrollment link on theActivities/Enrollments/Services ribbon”.
- Select the correct Customer Program Group on the General Information tab
- Select “San Diego Workforce Partnership” as the LWDB Region
- Select the assigned office location name as the office/location
- Click ‘select agency code’ to search and assign the agency code
- For a specific grant funded program, Scroll down to Enrollment Information to select a Grant for this activity, if applicable.
- Click the link titled “Select Activity Code”. This will generate a pop-up box with a list of possible activity codes.
- Select the appropriate Activity Title and that title will fill in the Activity Code box.
- Enter a Projected and Actual Begin Date of the activity start date
- Enter a Projected and Actual End Date for the activity. Note that the Projected End Date can be changed or pushed out if necessary.
- Click “Next” to save information and move on.

Note: Once the “Next” button is clicked, the activity code is created and added to the individual’s activity service record.

Objective Assessment Summary Form

Subrecipients are required to provide an OAS of the academic levels, skills levels, and service needs of each participant and recorded in CalJOBS. The OAS Form is found on the Plan tab in a participant profile. The Objective Assessment Activity code should be entered separately to capture that the OAS form has been updated.

Note: The OAS Form is separate from the IEP/ISS Form. OAS Form is completed one time at enrollment/eligibility and never touched after completion.

Refer to **ATTACHMENT - OBJECTIVE ASSESSMENT INSTRUCTIONS AND REQUIRED FIELDS** for detailed descriptions of required sections.

Refer to [SDWP Operations Manual, Chapter 4](#) for specific information regarding timeline.

1. Individual Employment Plan/ Service Strategy (IEP/ISS) Form

The IEP (also known as the Individual Service Strategy (ISS) is an age appropriate, individualized, written plan of short and long-term goals that include career pathways, education, training, employment goals, and support services and recorded in CalJOBS. Refer to **ATTACHMENT - IEP/ISS INSTRUCTIONS AND REQUIRED FIELDS** for detailed descriptions of required sections.

An IEP CalJOBS form is required for each participant and must be completed within 30 days of enrollment. Staff should review the IEP on a regular basis. The IEP must be updated anytime the goals and/or objectives need to be updated per a conversation with the participant. This Includes a need for supportive services, updating of goals or continuing plan services.

IEP/ISS Process

At enrollment

- Create and open an IEP/ISS activity code on the participant's record
 - Select the begin date as "Today." Enter the projected end date as "Today."
 - Exit the activity enrollment form
- Click the CalJOBS Plan tab to access the IEP/ISS CalJOBS form.
- After creating the IEP/ISS CalJOBS form, access the participant's service record
- Add an attach a case note to record that the participant's initial goals and objectives were completed on the IEP/ISS CalJOBS form.
- Close the open IEP/ISS activity code and mark the completion status with the creation date of the IEP/ISS CalJOBS form.

Updates to the IEP

- Create and open an IEP/ISS activity code on the participant's record
 - Select the begin date as "Today." Enter the projected end date as "Today."
 - Exit the activity enrollment form
- Click the CalJOBS Plan tab to access the IEP/ISS CalJOBS form.
- Update the IEP/ISS CalJOBS form
- Enter the date of the IEP/ISS Activity Code on the goal/objective comment box and provide a summary of the update (*i.e.* xx/xx/xx – *Successful completion of a goal, update/change to a goal, adding a new goal, etc.*)
- After updating the IEP/ISS CalJOBS form, access the participant's service record
- Add an attach a case note to the activity to record what goals/objectives were added, completed, and/or updated on the IEP/ISS CalJOBS form (*i.e.* *Updated/Successful/Unsuccessful completion of a goal*)
- Close the open IEP/ISS activity code and mark the completion status with the date of when the IEP/ISS CalJOBS form was updated.

Refer to [SDWP Operations Manual, Chapter 4](#) for specific information regarding timeline.

2. Activity Service Codes

An activity code (also known as activity enrollment or service) is documented progress or a reciprocated communication between a case manager and a specific participant (NOT the training provider, not a relative, etc.) Reciprocation can occur through different types of communication (*i.e.* face-to-face, over the phone, email, etc.)

All activities MUST have a reciprocal response from the individual. Leaving a message, mailing a letter, or emailing a customer is NOT an activity unless the individual returns the call, or responds to the letter or email, or visits the subrecipient and acknowledges the correspondence.

Activity Codes must be used to document participant activity in a program. Participants are required to have at least three activities to be considered "actively enrolled in a program." Those with less than three activities may negatively impact performance. An activity should benefit a participant: what did the participant gain from participating/receiving the service? Ex. Receiving/submitted paperwork from the participant is NOT a service.

Note: Staff shall NOT enter a new activity to a participant profile to document an update to an existing service. Activities are meant to document a NEW service. For any updates to an ongoing service, staff shall enter a new Case Note documenting the update (see Case Notes section below for guidance on formatting).

3. Types of Services

EDD has divided activity codes into reporting categories (which refers to their reporting structure to DOL). For more detailed information on each specific activity code (including whether they are enrolled in a Adult, Dislocated Worker, or Youth Title I program, whether it restarts the exit clock, what sections of the PIRL it is used, its duration, and whether Right to Work Verification is required) refer to [ATTACHMENT – CALJOBS ACTIVITY CODES DETAILED LISTING](#). For the SDWP’s purposes, the EDD reporting categories refer to the type of each service and when it’s appropriate to use each type of service.

- **Basic Career Services** – Must be made available to all individuals seeking employment and training services. These generally require less staff involvement. These include: Self-Service, Information-Only services, and Staff-Assisted.
- **Individualized Career Services** – Must be provided to participants when staff determine that such services are required to retain or obtain employment. Generally, these services involve significant staff time and customization to each individual’s needs.
- **Training Services** – Staff may determine training services are appropriate, regardless of whether the individual has received basic or individualized career services first. Training services must follow the SDWP policies.
- **Supportive Services** – Designed to provide a participant with the resources necessary to enable their participation in career and training services. Programs have different policies and procedures when providing supportive services.
- **Follow-up Services** – May begin immediately following the last date of service if it is expected that the participant will not receive any future services other than follow-up services. Providing follow-up services does not extend the date of exit and do not trigger re-enrollment in the program.
- **Youth Career Services** – Refers to specific services only available for eligible youth between ages 14-24.
- **Miscellaneous** – Services that are used as tracking for information purposes only (as far as EDD and DOL are concerned).

Note: Some programs may be directed to use activity codes for reasons that differ from what EDD has specified in the attachments provided. Check with your contract administrator for any questions regarding service delivery.

WIOA Title I Program	First Activity	Second, or Concurrent Activity	Third Activity
WIOA Title I Youth	412 - Youth Objective Assessment	413 - Youth ISS/IEP	First Service Related Activity Code
WIOA Title I Adult	203 - Adult Objective Assessment	205 - Adult IEP	First Service Related Activity Code
WIOA Title I Dislocated Worker	203 - Adult Objective Assessment	205 - Adult IEP	First Service Related Activity Code

For a complete list of Activity Codes, refer to **ATTACHMENT - ACTIVITY CODE DICTIONARY**.

4. Training Activity Codes – Standard Occupational Classification (SOC) Codes

Subrecipients are required to select Standard Occupational Classification (SOC) codes for all activities categorized as Training Services. Please refer to **ATTACHMENT – CALJOBS ACTIVITY CODES DETAILED LISTING** for additional activity code information. Selecting the appropriate SOC code is the responsibility of the subrecipient staff. The SOC code selected should be dependent upon the type of training received by the participant, and should reflect the occupation for which the participant received training. Training Related Employment measures will utilize this data entry to determine successful performance outcomes.

Training Activity - SOC Code Process

After completing the General Information tab for a new training activity:

Provider Field

- Select the link “Select Provider”
- Expand the Show Filter Criteria link at the top of the pop-up window
- For Provider Name, search “General”
- Select “Filter”
- From the filtered results select “General Training Provider”

Service, Course or Contract Field

- Select the link “Select Service, Course or Contract”
- Select the program available in the pop-up window

Occupational Training Code Field

- Select the link “Occupational Training Code”
- Use the pop-up window to search an occupation by the options available
 - Recommendation: Search by keyword
 - Type in the occupation title and see a list of related occupational names
- Select an occupation

To save all fields entered, select the Next button at the bottom of the page.

F. CASE NOTES

A case note is used as a detailed description of a participant’s progress in their program. Case notes should be concise, clear, spelled properly, and grammatically correct. Only commonly used and accepted acronyms and abbreviations shall be used. Case notes should be professional, detailed, and objective. Case notes are part of the individual’s legal file and may be used to determine the legitimacy of grievances or disputes. Case notes are required for every activity code entered. No opinions or comments of the case manager should be included.

At a minimum, case notes are statements entered in CalJOBS by the staff member to identify and record a specific program element that identify the participant’s status, the date the information was obtained, and the staff’s name that obtained the information.

There are two types of case notes required to be entered into CalJOBS:

1. Stand-Alone Case Note

A stand-alone case note *is not attached* to a specific activity and is used to document a participant's progress, unsuccessful attempts to reach an individual or communication when there is no reciprocation from the specific participant (cannot be a training provider, relative, etc).

2. Activity Case Note

An activity case note *is attached* to a specific activity when a service has been provided to an individual. Activities shall always be supported by an activity case note that clearly and completely describes and briefly summarizes the event/activity being documented so that it may be understood by anyone reviewing the note.

The subject line of an activity case note should be formatted as such:

Case Note Subject Line Process

- When entering a case note for an activity code use this format:
 - Activity Code number – Activity Code name
 - EXAMPLE:
SUBJECT LINE: 412 – Youth Objective Assessment

No case note shall ever be deleted. In the event that an update needs to be provided for a pre-existing activity code, no changes should be made to the existing case note. Instead, add a new case note with the same subject line but with an additional identifier such as:

- Activity Code number – Activity Code name: [1-4 word description of update]
 - EXAMPLE:
SUBJECT LINE: 412 – Youth Objective Assessment: Added New Goals

Refer to ***SDWP Operations Manual, Chapter 4 and Chapter 7*** for specific information regarding required stand-alone case notes, and to ***CalJOBS Forms and Procedures Handbook*** for details on how to enter specific data.

G. CASE CLOSURE

A case closure is manually entered by staff which indicates that the participant has closed/completed their grant funded program. Subrecipients must complete a closure form in CalJOBS once a participant has completed their planned goals and objectives on the IEP and all program activities. Employment status and placement information is required to be entered by staff. The closure form must detail the outcomes during participation including follow up services on an attached case note.

Case Closure Data Entry Process

All activities must be closed before creating a case closure form

- Click the “+” expand the participant’s WIOA Title I application
- Click the “+” expand the participant’s Closure form
- Click “Create Closure” to enter program required information indicated on the form.

Note: “Closing” a participant’s case file does not “exit” them in CalJOBS.

Refer to **SDWP Operations Manual, Chapter 4 and Chapter 7** for specific information regarding Program Closure.

IV. PROGRAM EXIT/OUTCOME

A. PROGRAM EXIT

1. 90 Day No Service

A 90-day no service exit, or Soft Exit, occurs when an Outcome Form is automatically generated by CalJOBS due to intensive staff-assisted services not being entered for at least 90 days. This action can occur with or without a Closure Form. This action cannot be reversed.

Note: An activity code 001 – Planned Break in Service alone does not prevent a system generated soft exit.

2. Exclusionary Exit

An exclusionary exit, or Hard Exit, occurs when a participant meets the definition for Global Exclusions that precludes them from entering into employment or participating in services. Exclusionary exits can be excluded from the Performance Measures, at the time of closure. Staff must manually enter this type of exit into CalJOBS to exclude from Performance Measures.

Refer to **SDWP Operations Manual, Chapter 4** for Global Exclusion definitions.

Exclusionary Exit Data Entry Process

- Complete a closure form
 - Include any outcome information that is relevant at the time of data entry
 - Staff should select 'no' as employment status.
- Complete an outcome form
 - Select appropriate global exclusion from Exit Reason drop down menu

Note: Exclusionary Exits do not apply to participants who have already entered follow-up. The exclusionary event must occur and be documented prior to their exit from the program. Any participant who meets the definition for Global Exclusions after they have already exited will still be included in performance measures.

B. FOLLOW-UP

Closure and follow-up forms must be fully completed, regardless if the information is required (noted by a red asterisk “**”) by CalJOBS. All data fields should be filled in, including using “N/A” when the field is not applicable to the participant. Performance is determined by a participant’s follow-up form due date (details can be found in **ATTACHMENT – WIOA PERFORMANCE INCLUSION TABLE.**) Follow-up form data must be entered by required deadlines to be included in that quarter’s performance **ATTACHMENT – WIOA PERFORMANCE CALENDAR.**

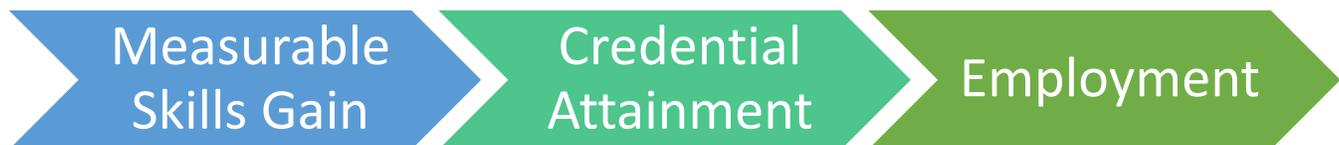
Subrecipients must provide follow-up services for at least 12 months for all participants, regardless of intensity of services - unless the participant declines to receive follow-up services or the participant cannot be located or contacted. In which case, these contact attempts or requests to cease communication must be documented in CalJOBS.

Follow-up services must include more than only a contact attempted or made for securing documentation in order to report a performance outcome. These services may include, but are not limited to: technical skills training, peer counseling, adult mentoring, crisis intervention, life skills, emergency support, incentives, and supportive services. These services will help participants ensure that they meet and maintain their career goals and job retention. Documentation of any follow up activities must be recorded in CalJOBS using the “F-Codes” found in [ATTACHMENT – CALJOBS ACTIVITY CODE DICTIONARY](#) and [ATTACHMENT – CALJOBS ACTIVITY CODES DETAILED LISTING](#).

Exceptions for completing follow-up forms are if the participant is marked as an exclusionary exit or a global exclusion reason is reported on a follow-up form.

V. PERFORMANCE

For detailed definitions please refer to Chapter 4 Parts 1 and 2 as well as your specific contract agreement. The illustration below will provide the data entry flow of the performance indicators associated with the services provided to the participant.



A. DOCUMENTING OUTCOMES

The performance indicator forms in CalJOBS contain the participant’s outcome of their WIOA Title I program. Subrecipients are required to record all performance related data in CalJOBS in order to document positive outcomes for the participant.

1. MSG Attainment Form

MSG Attainment Data Entry Process

- Navigate to the Measurable Skills Gain Form section.
- Select the link to “*Create Measureable Skills Gain.*”
- Enter *required fields.
 - Enter actual date of participant’s MSG attainment
- Add a case note documenting the details of the attainment.

Note: For the Date Skill Attained field, enter the date the participant attained the skill. For example, the date skill attained could be the date of an exam, the date of the end of the school semester, or the date the milestone was determined. This is NOT the date the documentation was received by the provider. The date entered into CalJOBS should be a date that can be found on the supporting documentation.

2. Credential Attainment Form

Credential Attainment Data Entry Process

- Navigate to the Credentials Form section.
- Select the link to “*Create Credential.*”

- Enter *required fields.
 - Enter actual date of participant's Credential attainment
- Add an attached case note to the education/training activity code that resulted in this credential and document the details of the attainment (ie. date of certificate and type of certificate attained).

Note: For the Date Credential Received field, enter the date found on the actual credential documentation collected for verification. This is NOT the date the documentation was received by the provider.

3. Employment

Employment can be captured in three areas in CalJOBS: Add Employment section, the Closure Form and the Quarterly Follow-Up Form. In order to document employment while a participant is still actively engaged in receiving services use the Add Employment section. To capture employment at exit enter an employment record on the Closure Form. To document employment during any of the follow-up quarters, enter an employment record on the Quarterly Follow-Up Forms.

Employment Data Entry Process

Add Employment Section

- Expand the Add Employment section using the plus icon
- Select the link to Add Employment
- Enter all required employment details
- Select Yes for Add to Employment History field, then the Save button

Closure Form

- Employment Information Section
 - Entered Employment field
 - Select Yes;
OR
 - Select Yes, Recall Employer
 - Select Add Employer link
 - If employment was entered previously in the Add Employment Section, use the link Search Individual Employment History and select appropriate employment information;
 - Select the Save button
OR
 - Enter new employment by entering all required employment details.
 - Select Yes for Add to Employment History field, then the Save button

Quarterly Follow-Up Form

- Employment Information Section
 - Worked in the Quarter field
 - Select Yes
 - Select Add Employer link
 - If employment was entered previously in the Add Employment Section or Closure Form, use the link Search Individual

Employment History and select appropriate employment information;

- Select the Save button
OR
- Enter new employment by entering all required employment details
- Select Yes for Add to Employment History field, then the Save button

Note: Make sure to indicate “Yes, the participant is working”, on either form. This field is what determines the positive credit for this outcome. Do not double click the Save/Submit buttons for the Employer details data entry. This can cause multiple Employment records to appear. There should only be one employment record for each quarter if the participant is only employed with one employer.

B. PLACEMENT IN EDUCATION OR TRAINING

WIOA Title I Youth providers should enter Placement in Education or Training data on the Quarterly Follow-Up Forms only. The Closure Form also has fields available to capture Placement in Education or Training data, however entering your placement data on the Closure Form will trigger the participant to be included in the Credential Attainment measure. If your WIOA Title I program does not intend to support the participant through to an occupational skills certificate/license/diploma, do not enter your placement data on the Closure Form.

Placement in Education or Training Data Entry Process

Quarterly Follow-Up Form

- Placement in Quarter XX/XX/20XX - XX/XX/20XX field
 - Select appropriate type of education/training option
- Date of Placement
 - Enter the date the participant’s first day of education or training start date

Note: The Date of Placement field does not have a red asterisk indicator signifying the field is required. However, it is a conditionally required field. In order to receive positive outcome credit for a WIOA Youth placement both the Placement in Quarter field and Date of Placement field must be filled out.

VI. DATA ENTRY REQUIREMENTS

A. REQUIRED DATA ENTRY

Subrecipients shall enter any and all data that is applicable to the participant’s participation in the program, regardless if the information is required (noted by a red asterisk “*”) by CalJOBS.

1. Case Management & Data Verification

Case Management is the infrastructure for delivering effective services that will facilitate the positive growth and development of participants and the achievement of performance goals. The process extends from recruitment through follow-up. Data validation is used to verify the accuracy, validity, and reliability of data. Data validation helps ensure the accuracy of quarterly and annual performance reports, safeguards data integrity, and promotes the timely resolution of inaccurate data. Staff should record all service related activities in CalJOBS. Source documentation must be collected by staff to

support grant funded program outcomes including eligibility documentation. All physical and electronic participant records must be readily available to the DOL, EDD, and SDWP for monitoring review.

2. Limited English Proficiency

Per 29 CFR Section 38.41 (a)(b)(2), Collection and Maintenance of Equal Opportunity Data and Other Information, beginning on January 3, 2019, it is required that each recipient must record the Limited English Proficiency (LEP) and preferred language of each applicant, registrant, participant, and trainee. Effective February 20, 2018, the required Limited English Proficiency (LEP) questions were added to the individual Registration form in CalJOBS to adhere to the requirement. Refer to **ATTACHMENT – LEP QUICK GUIDE** for detailed descriptions of required sections.

3. VOSGreeter

VOSGreeter is a module within the CalJOBS system to assist American Job Center of California (AJCC) staff to track visitor traffic electronically, instead of using a paper sign-in sheet. It also allows offices to track the number of visitors to the centers and the reason(s) for their visits. Each AJCC has been provided with a generic login to the CalJOBS system to use to launch the VOSGreeter module at the designated kiosks in their center.

According to EDD directive WSD17-09, use of VOSGreeter is a statewide requirement that applies to all AJCC locations. Use of VOSGreeter was implemented in the San Diego region on or before October 1, 2018. VOSGreeter must be used daily to accurately record AJCC visitors and their visit reasons. Furthermore, any visitor traffic recorded outside of CalJOBS during high volume times must be manually entered into CalJOBS by the end of the same day.

Refer to **ATTACHMENTS – VOSGREETER SET-UP** and **USER GUIDES** for step-by-step directions on setting up and using the VOSGreeter module.

B. LATE DATA ENTRY

Timely data collection is required. Entry of applications, objective assessments, literacy/numeracy assessments, IEP/ISS, service activities, case notes and performance indicator forms including measurable skills gains, credential attainment, closure, and follow-up must be entered within seven (7) calendar days after the date of occurrence.

Late data entry is defined as CalJOBS data entry that is entered later than seven (7) calendar days and is based on the total number of CalJOBS data entered. Late data entry should be no more than 5% and will be included as part of performance as noted in subrecipient's contract in the program performance measures attachment.

CalJOBS allows for data to be backdated up to 30-days by providers. No data cannot be backdated greater than 90 days of the current date. Only follow-up activity codes can be entered after exit.

C. DATA CHANGE REQUESTS

Per EDD Directive WSD18-02 *Data Change Request Form Procedure*, an electronic Data Change Request (DCR) is a request by a service provider to modify data already entered in CalJOBS. These requests must be approved by the case managers' approving supervisor, as well as by the SDWP staff. Most requests will be forwarded directly to EDD by the case manager or their supervisor. Some requests may be completed by the SDWP without the need to forward to EDD – in these instances,

Creator and Requestor will receive an email notification from the eDCR system indicating that your request was completed by the SDWP.

All DCRs must be submitted to the Workforce Partnership within 75 days of the date of request to allow for processing time by both the SDWP and EDD. Submitting a DCR does not guarantee approval of your request. Be thorough in your explanation when creating and submitting your request(s).

Please note that excessive data change requests may result in the SDWP intervention and lead to corrective action.

Request for a Data Change Request (DCR) Account Process

New Staff

- Managers shall request an account via:
 - Partner Portal > Resources > Staff Changes
 - Type of eDCR staff account
 - **Creator** will allow staff to create DCRs and to view the status of existing DCRs
 - **Requestor (Approver/Supervisor)** will allow staff to view the status of existing DCRs and approve DCR requests
- Login credentials will be provided by autogenerated email.

Existing staff

- Managers shall request an account by:
 - Email the following information to CalJOBS@workforce.org:
 - Provider Name
 - First Name
 - Last Name
 - Email address
 - Phone number
- Login credentials will be provided by autogenerated email.

Reset password/account update

- Staff shall email information to CalJOBS@workforce.org
- Password reset/account updated notification will be provided by autogenerated email.
- Login credentials will be provided by autogenerated email.

Access eDCR Process

- Login onto eDCR system: <https://app.workforce.org/fmi/webd/DCR>
- Enter log in credentials
 - **Creator:** To create new DCRs and to view the status of existing DCRs, login to your account using the above URL.
 - **Requestor(Approver/ Supervisor):** To sign and approve DCRs, login to your account using the above URL

Refer to **ATTACHMENT – EDCR SYSTEM USER GUIDE** for detailed descriptions of required sections.

Creating a Data Change Request (DCR) Process

Creator

- Select “Create New DCR,” and verify that you want to proceed.
- Fill out the Data Change Request Form. Creators can submit as many requests as they need.
 - All fields are required in order to submit the request.
 - Upload the enrollment activity CalJOBS print out showing the error
 - Upload documents that support the validity of the change you are requesting.
- When the form is complete, select the Submit button.
- Once a Creator selects the Submit button, their name is captured on the form along with the date and time it was submitted and that information is displayed.
- An email will be sent automatically to a Creator’s approving supervisor (the Approver/Supervisor) as soon as the Requestor’s DCR is ready for approval.

Requestor: Approver/Supervisor

- Approver/Supervisors can login to their account and approve the submitted DCR(s) by accessing it from their “DCR List,” clicking the signature button, entering their signature, and confirming their approval.
 - A Requestor or Approver/Supervisor can view the status of submitted DCRs by clicking on “DCR List” at the top of the screen and checking the Status column.
 - Approver/Supervisors have the ability to modify a DCR once it has been submitted for their review and approval.
 - Once their review and any modifications are complete, the Approver/Supervisor will approve the DCR.
- After review and approval have been completed by the Approver/Supervisor, the MIS Admin and Program Designee will review and sign the request.

eDCR status update

- Some DCRs may be completed by SDWP – an email will be sent to both Creator and Requestor in that instance.
- Some DCRs may require more information from the Requestor, this will require a second review and approval by the Approver/Supervisor.

Note: DO NOT knowingly enter inaccurate data into CalJOBS. Fraudulent data that was knowingly entered into CalJOBS will be considered a finding. For example: if you need to enter a service that you know took place more than 30 days ago and you know you will need to submit a DCR to EDD to backdate DO NOT enter the service and then backdate as far back as you can (knowing it needs to be dated more than 30 days). Instead, you must submit a two-part DCR first requesting permission to enter an activity code and then to backdate it to a date more than 30 days ago.

Refer to **ATTACHMENT – EDCR SYSTEM USER GUIDE** for detailed descriptions of required sections.

D. MONITORING

SDWP and/or a third-party monitor contracted through SDWP, EDD, and in some cases DOL will conduct monitoring of program activities within the participant’s records during oversight visits, including

CalJOBS. Refer to ***SDWP Operations Manual, Chapter 8: Oversight and Monitoring*** for further guidance.

In some cases, monitoring findings may require a correction to data entry. Refer to the Data Change Requests section to review requirements for submitting data change requests. In some instances, when a finding cannot be corrected, SDWP staff may direct the subrecipient to enter a standalone case note in lieu of correcting the data, as well as providing a corrective action plan.

VII. ATTACHMENTS

A. REFERENCED ATTACHMENTS

- a. [CalJOBS Activity Code Dictionary](#)
- b. [CalJOBS Activity Codes Detailed Listing](#)
- c. [eDCR System User Guide](#)
- d. [IEP/ISS Instructions and Required Fields](#)
- l. [LEP Quick Guide](#)
- e. [Objective Assessment Instructions and Required Fields](#)
- f. [VOSGreeter Setup Guide](#)
- g. [VOSGreeter User Guide](#)
- h. [WIOA Performance Calendar](#)

B. ADDITIONAL ATTACHMENTS

- p. [MSG Adult/Dislocated Worker Chart](#)
- o. [MSG Youth Chart](#)
- q. [WIOA Title I Adult/Dislocated Worker/Youth Program Performance Reports Guide](#)