CalJOBS Data Guide

State-Funded Grant Programs

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Last Revised: 09/20/2023

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Purpose of the Data Guide

This guide was created as a comprehensive resource for Fiscal Agents/Awardees when reporting participant data in the California Job Openings Browse System (CalJOBS) as the selected data capture system. Fiscal Agents/Awardees can opt to report participant data in either CalJOBS or the State Grant Data Capture System (SGDS). Fiscal Agents/Awardees will select which system to use at the start of their grant program, which will be final. No switching between CalJOBS and SGDS will be permitted. The CWDB is developing and creating a data collection component in the Cal-E-Grants system and will provide further instructions when the data collection component is complete.

Please use this data guide as needed and share it with partners, front-line workers, program administrators, data entry professionals, contractors, etc., as appropriate. This document may be updated throughout the grant term. Updated versions of this document will be posted on the California Workforce Development Board website.

Fiscal Agents/Awardees and their staff who report on behalf of the project must be familiar with CWDB's expectations for reporting and attending all trainings. Fiscal Agents/Awardees who do not comply with reporting requirements may be subject to cash holds and/or other repercussions. The CWDB will conduct data validation reviews every six (6) months to ensure Fiscal Agents/Awardees are accurately entering data. Fiscal Agents/Awardees will be expected to assist in this review where appropriate.

Participant data collection system technical assistance will be handled by the Research Unit of the Policy, Research, and Legislation Branch. For questions or technical assistance regarding participant data collection for CalJOBS, contact the Research Unit.

Section I. CalJOBS Individual Registration, WIOA Title I Application, and Enrollment

The CalJOBS system is designed for federal workforce program reporting and case management. The figure below shows the action items available for program staff in CalJOBS.
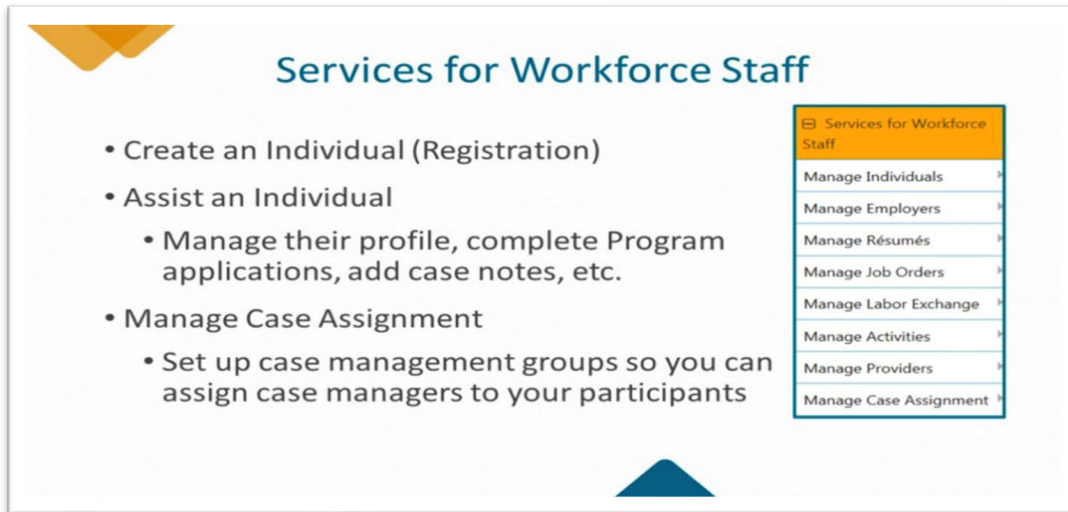
Figure 1 CalJOBS Services for Workforce Staff

Program staff will report the following in CalJOBS:
- Demographic information
- Program eligibility (priority population data)
- Services received
- Employment and earnings outcomes
- Postsecondary educational attainment
- Skill gains

CalJOBS Steps for Each Participant Checklist
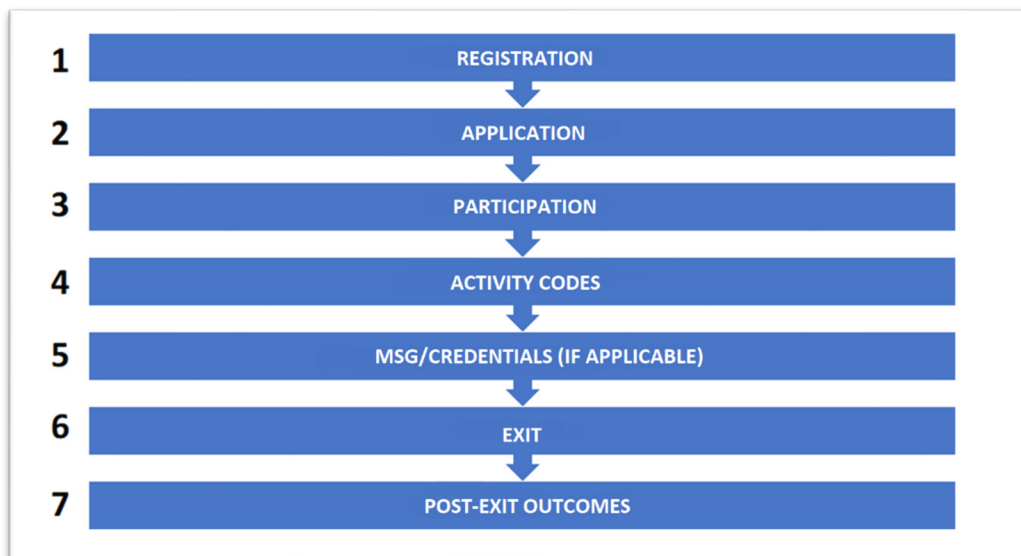
Figure 2 CalJOBS Steps

Below is a general overview of the different steps to take when entering data in CalJOBS through the WIOA Title I application.
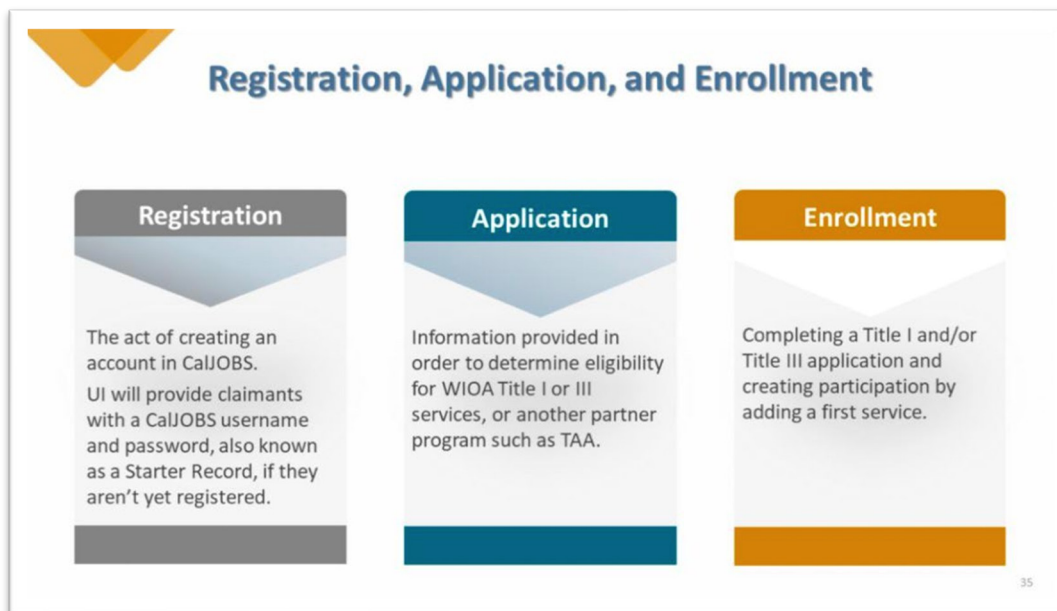
Figure 3 CalJOBS Process

Program staff will take the following steps to register and enter data in CalJOBS.

1. Complete a CalJOBS Registration form. **Note:** The individual can complete the form or staff can assist with the process.
2. Complete the WIOA Title I applications and collect individual eligibility information.
3. Enroll the individual by Creating Participation and entering the first Activity Code. **Note:** Participant can begin receiving services after enrollment is complete.
4. Document services received by participant by using activity codes.
5. Complete the Closure Form when individual services are complete to indicate the individual can be exited from the program. **Note:** An Exit Date is generated on the 91st day of the exit. The individual can receive follow-up services after this date and will be tracked for performance during the follow-up period.

CalJOBS Registration Process
Complete a Registration Form to initiate the registration process. The Registration Form captures pertinent demographic information which helps develop local workforce development project initiatives. All information is self-disclosed and no proof of any documentation or eligibility is required when completing the Registration Form. Program staff can assist the future participant in completing a Registration Form.

Completing registration and completing the application are two separate processes. An individual must be registered in CalJOBS *before* program staff can start the WIOA Title I – Youth, Adult, and/or Dislocated Worker Application for enrollment into the initiative (grant program).

Data collected at registration includes:
- Name/SSN
- Contact information
- Demographics
- Public assistance
- Education/Employment
- Farmworker/military service

How to register an individual:
1. Navigate to the www.caljobs.ca.gov homepage.
2. Enter the program staff *Username* and *Password.*
3. Select the *Sign In* button on the right.
4. Read the Staff Sign-In Notice and select *I Agree.* **Note:** Figure 4 will appear in the next screen.
5. Select *My Staff Dashboard* on the upper left of the screen.
6. Hover over *Manage Individuals* on the bottom left of Figure 5.
7. Select the *Create an Individual* box (Figure 6). **Note:** The red asterisks, blue text, question mark icons, and underlined links located throughout the application will help Fiscal Agents/Awardees complete the individual registration.
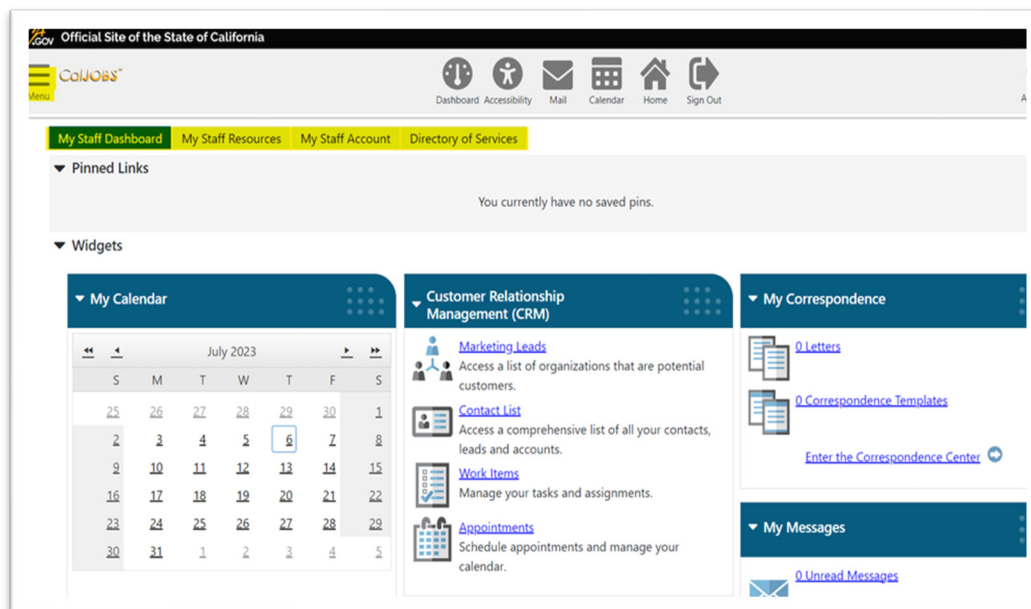
Figure 4 CalJOBS My Staff Workspace
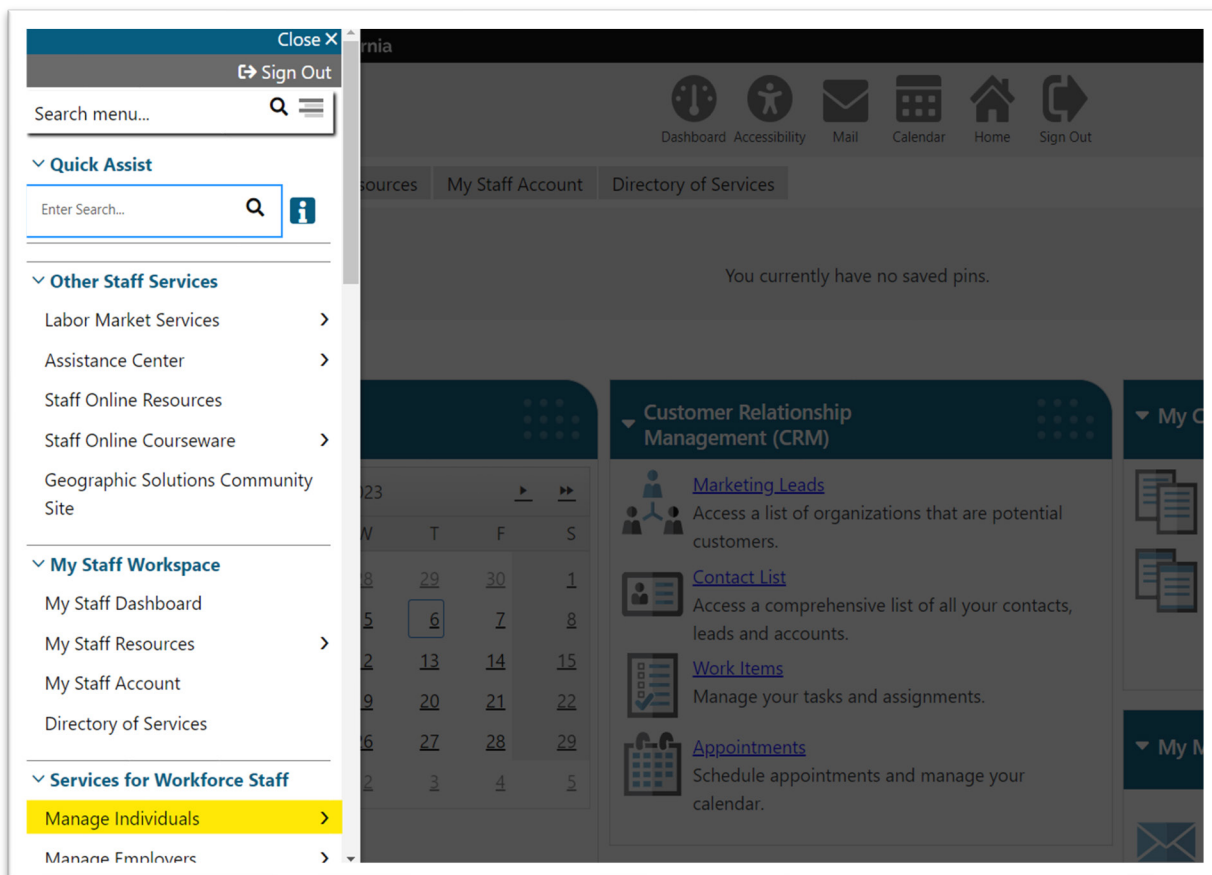
Figure 5 Expanded View of Menu (upper lefthand corner)
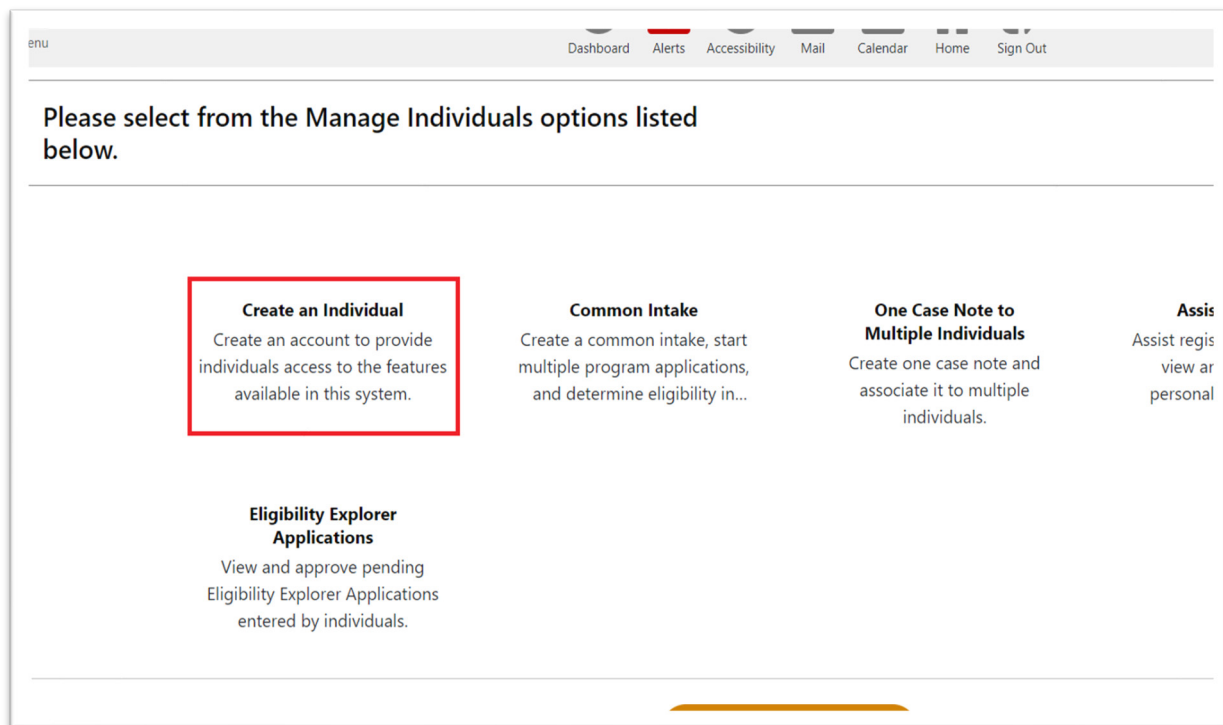
Figure 6 Create an Individual Option

8. Complete the information requested in the Login Information fields.
9. Enter the individual's Social Security Number or pseudo SSN in the appropriate section.
10. In the Primary Location Information section, enter the individual's zip code, using the Find Zip Code link if necessary, or type it in the box.
11. Answer whether authorized to work in the United States. **Note**: Undocumented participants are eligible but a pseudo SSN must be requested and created for undocumented participants. Refer to the Citizenship/Undocumented Individuals section in this Data Guide for further guidance regarding obtaining a pseudo SSN.
12. Enter the participant's first and last name (middle initial is optional) and select *Next*.
13. Enter *Yes* if the individual is currently homeless. If the individual is not homeless, enter the individual's home address.
14. Select the most appropriate answer from the dropdown menu which asks from where the Fiscal Agent/Awardee is accessing this website. Select *Next.* **Note:** This question is mandatory and used for statistical purposes.
15. Select the appropriate answer for the citizenship question. **Note:** This question is used for statistical purposes.
16. Answer the Employment Information and Farm Worker Information questions. **Note:** Select the appropriate answer in the drop-down menu.
17. Answer the questions in the Ethnic Origin section.
18. Answer all mandatory military service questions.
19. Answer all the Veteran Information questions, if applicable. **Note:** If the answers are *No* to the first five questions, two additional mandatory questions will populate at the

bottom (highlighted box). This section will help determine eligibility for certain program services based on low income.
20. Registration is complete!

Selective Service
Selective Service is not a requirement for state-funded grants. If selecting *Not Applicable* from the dropdown menu, continue with the Title I Application.

Right to Work Documentation
Right to Work Documents are not required for state-funded grants. Select *No* to bypass this question when the prompt asks if these documents are available.
Note: CWDB recommends that Fiscal Agents/Awardees retain these documents on file if possible.

CalJOBS WIOA-Title I Application Process
Once an individual has registered in CalJOBS, program staff can search for and select the individual in the database to continue the enrollment process. An individual enrolled in a CalJOBS program is considered a participant.

An individual's eligibility (priority population criteria and barrier(s) to employment) will be captured by completing the Individual Registration and one of the following WIOA Title I applications.

- *WIOA Title I— Youth*
- *WIOA Title I – Adult*
- *WIOA Title I – Dislocated Worker*

The applications that most participants will use are the *WIOA Title I – Youth Application and WIOA Title I – Adult Application. The Title I – Dislocated Worker Application* only applies to displaced worker participants.

Data collected in the applications include:
- **Program eligibility date(s)** –Adult, Dislocated Worker, Youth, Incumbent Worker
- **Veteran information** –Transitioning service member, general veteran information
- **Employment information** –Unemployment Insurance status, long-term unemployed
- **Education information** –School status, highest school grade completed
- **Public assistance, barriers, and household income** – Temporary Assistance for Needy Families (TANF), GA, English Language Learner (ELL), etc.
- **Eligibility** – WIOA Special Grants and Non-WIOA Special Grants

Participants over 18 can enroll using the *WIOA Title I — Adult Application* and/or *WIOA Title I – Dislocated Worker Application*. If a participant is between 18-24 and needs access to the youth-specific services, they can complete the *WIOA Title I – Youth Application*. The WIOA Title I application's main purpose is to link the participant to various programs, avoid duplication in services, and offer the best possible support.

How to Create a WIOA Title I Application

1. Select *Assist New Individual* and search for a registered individual by entering a Social Security number (SSN) or username.
2. Navigate to the top left of the navigation panel and select the participant's name under the *Currently Managing* tab.
   Note: The system will show a series of folders containing links within each folder. (Figure 7)
3. Expand the menus as shown in Figure 7.
4. Navigate to *Staff Profiles* → *Case Management Profile* → *Programs* as shown in Figure 7
   Note: After the individual's *Programs Tab* is accessed, it will appear as one of four tabs on the top of the page, all under the Case Management Profile. (Figure 8)
5. Scroll down to the Workforce Innovation and Opportunity Act (WIOA) Program section.
6. Select the Create Workforce Innovation and Opportunity Act (WIOA) Program link to open a new WIOA application (Figure 9).
7. Enter the application information (date, eligibility information, etc. if applicable).
8. Enter the application information such as application date, eligibility information (if the participant is applying for Intensive Services) , agency code, and office location in the Start tab. (The WIOA application is a seven-tab process.)
   Note*:* If the site has an Agency Code field, select the *Select Agency Code* link to open a window, search for an agency by complete or partial keyword, and select an agency from the displayed list.
9. Verify information on all tabs and make selections for unanswered questions as some selections from registration do not transfer over.
10. Select the appropriate Grant Code.
    Note: The displayed values result from the previous Customer Program Group selections - if it was for a group related to added grants, the added grants will be found in the drop-down list.
11. The WIOA application is now complete!
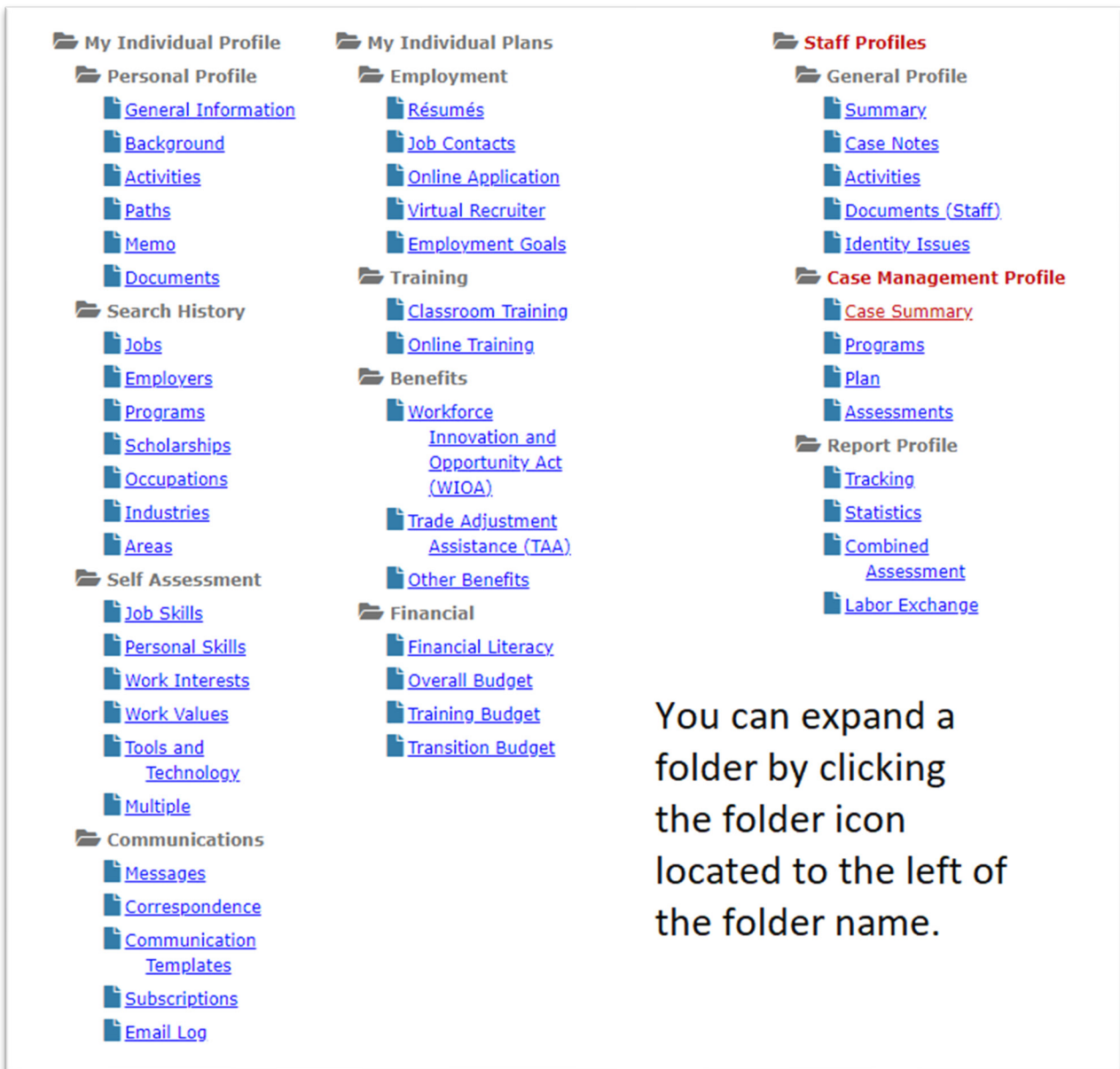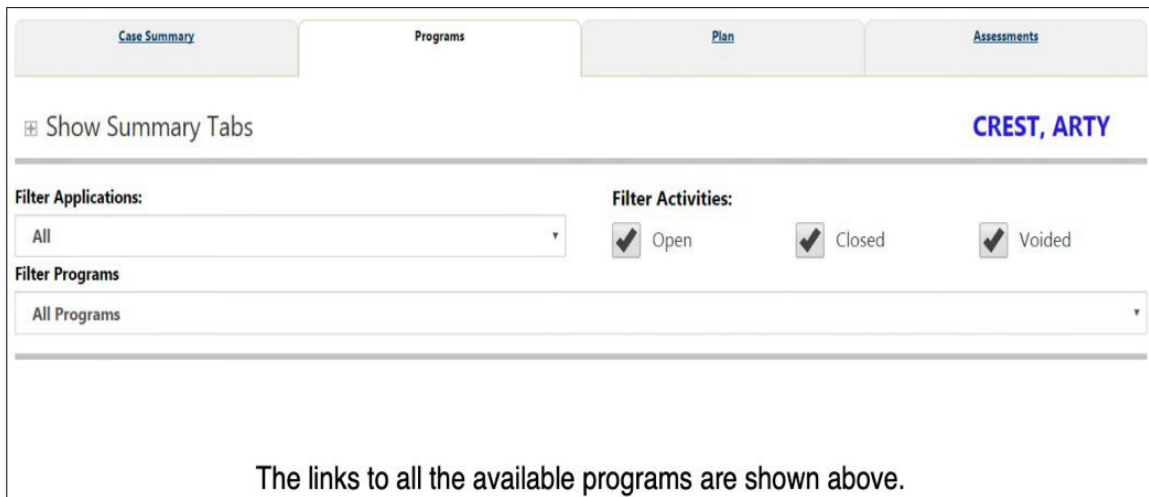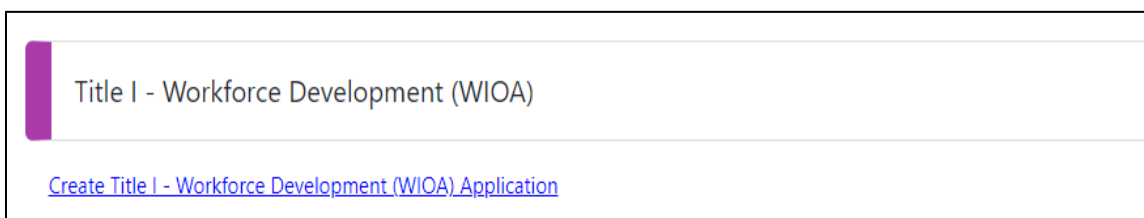
Figure 7 CalJOBS Management Folder

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Figure 8 CalJOBS Links to Programs

Figure 9 WIOA Application Link

Once staff has selected the individual they will be working with, a *Currently Managing* section will appear at the top left side of their screen. Select *Create Participation* and enroll the individual by adding a participation date and the first activity code.

Creating Participation & Enrollment

Enrollment occurs after completing the WIOA Title I application and by creating participation, which occurs by entering (opening and closing) the first activity code (associated with a service provided to the participant).

How to Create Participation and Enrollment

1. Click anywhere in the light gray ribbon titled Participation to expand the Participation section (Figure 10).
2. Select the *Create Participation* link in the lower part of the screen, below the word "Participation".

Figure 10 CalJOBS Create Participation

3. Enter the participation start date in the corresponding field in the Participation Information section. **Note:** The start date should be the date staff provides the first service to the individual. It cannot be before the Eligibility date, or before a future date.
4. Select *Next* to bring up the Activity Enrollment - General Information page.
   Note: The questions will vary, depending on the type of application being completed.

CalJOBS Enrollment Variations
This section provides direction regarding areas of the CalJOBS process that differ from WIOA Title I requirements.

Differences exist in the following stages of enrollment:
- Gender
- Incumbent workers
- Citizenship

A participant's eligibility (target population criteria and barrier(s) to employment) will be captured during the Individual Registration, and WIOA Title I – Youth, Adult and/or Dislocated Worker applications process.

During the Individual Registration process, there are eligibility questions that do not transfer into the *WIOA Title I – Youth, Adult, and/or Dislocated Worker Applications.* This section identifies these eligibility criteria and provides additional guidance.

Note*:* This information applies to enrollment in the **state-funded initiatives only** and does not apply to cases in which a program staff is co-enrolling a participant with another program.

Transgender/Gender Nonconforming Individuals
In the *WIOA Title I –Youth, Adult, and Dislocated Worker Applications,* gender is determined only by the selection to the question during the Individual Registration that reads:

>*What sex were you assigned at birth, on your original birth certificate?*
>(Figure 11)

The WIOA Title I – Applications do not take into consideration the selection for the question:
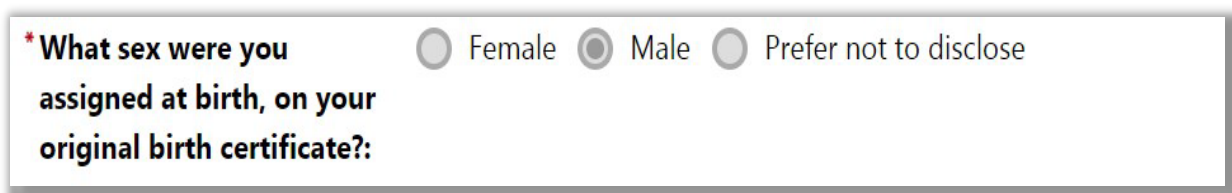
>*How would you describe yourself?* (Figure 12)

Example: If *Male* is selected for the first question and *Woman* is selected for the second question during the Individual Registration process, the WIOA Title I –Application will assume the individual is a male. Therefore, metrics regarding women, such as "*Women seeking training or education in nontraditional fields of employment* "will not populate in the WIOA Title I – Application. If program staff encounter this situation and need further clarification, contact the CWDB Research Unit.

Program staff must select the option that most accurately applies to the individual for the following questions under the *Demographic Information* section of the Individual Registration process:
>*What sex were you assigned at birth, on your original birth certificate?* and

>*How would you describe yourself?*

Figure 11 CalJOBS Participant Demographics Question 1

Figure 12 CalJOBS Participant Demographics Question 2

Note: The transgender and gender nonconforming individual eligibility only transfers the selection on the sex assigned at birth question (Figure 11) and does not transfer the selection on how an individual would describe themself (Figure 12) into the WIOA Title I – Application.

The selection to Question 1 (Figure 11) is linked to other questions during the applicant's Individual Registration and WIOA Title I – Application. If the answer to that selection is *Male*, the CalJOBS system will populate questions specifically for males for the Individual Registration and WIOA Title I –Application.

Incumbent Workers
Incumbent Worker Training (IWT) allows workers and employers to build and maintain a quality workforce and increase both participant and employer competitiveness. IWT provides work-based training and upskilling designed to ensure California workers can acquire and develop the skills necessary to avert layoffs and increase employee skill levels so they can be promoted within the company and create backfill opportunities for employers (Refer to Directive WSD19-01 for more information).

To qualify as an Incumbent Worker, the employee must meet the following criteria:
- Be a current employee of an eligible employer.
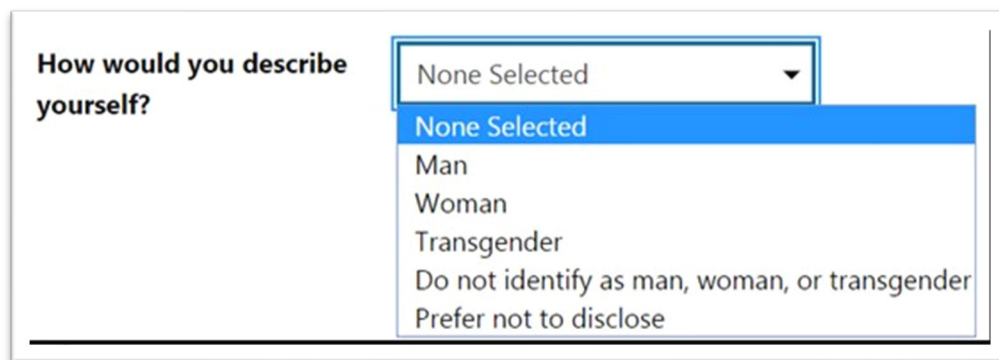- Be employed by the eligible employer for at least six months. **Note:** If the employee has not been employed with the eligible employer for at least six months, employee is considered a "new" employee.
- Meet the Fair Labor Standards Act requirements for an employer-employee relationship.

How to Enroll Incumbent Workers
All participants must register using the *Title I-Youth, Adult,* or *Dislocated Worker* applications, not the *Incumbent Worker* application. Add Activity Code *308-IWT for Incumbent Worker*s to the participant's application.

Take the following steps to enroll incumbent workers.
1. Select *Yes* to Incumbent Worker Eligibility on the Eligibility Summary tab of the Title I application.
2. Add *CalJOBS Activity Code 308 – IWT* should be added to the application and associated with the appropriate funding stream for the duration of the IWT.

Citizenship/Undocumented Individuals
Tracking the services of undocumented individuals in CalJOBS is the same process. To register for a CalJOBS account, an SSN or pseudo SSN must be entered into the system. WSD20-11 provides the current guidance on pseudo SSNs.
A pseudo SSN is issued by the Employment Development Department (EDD) or the Local Area Management Information System (MIS) Administrator under two circumstances:
- At the request of a job seeker
- If a duplicate SSN exists.

Participants are not required to provide their SSNs to receive employment or training services, *excluding* Unemployment Insurance (UI).

The Department of Labor (DOL) requires the State report program performance by matching an SSN to base wage records. Thus, the State is encouraged to collect a job seeker's SSN for reporting purposes. The (EDD) Field Divisions assign pseudo SSNs with the understanding that pseudo SSNs are excluded from performance, except where supplemental data is available consistent with current DOL policy.

Where to Request a Pseudo SSN:
Local Area MIS Administrators and EDD Field Division Supervisors can edit SSNs in the CalJOBS system and create individual registrations with a pseudo SSN. Individuals cannot assign themselves a pseudo SSN during self-registration. For additional information on assigning participants a pseudo SSN, please refer to Attachment 3 of WSIN20-11.

How to Assign a pseudo SSN:
Staff will take the following steps to assign a pseudo SSN.
1. Locate the left navigation pane (Figure 5).
2. Select *Manage Individuals.*
3. Select *Create an Individual*.
4. Register the job seeker by completing the registration wizard.
5. Assign a pseudo SSN according to Division or LWIA parameters in Attachments 2 and 3 of WSIN20-11.
6. Select *Next* (located at the bottom of the screen).
7. Verify that the pseudo SSN has populated for the job seeker. **Note:** The job seeker record will state, "Individual has not provided a valid SSN." If this statement does not immediately populate on the screen, finish the job seeker's registration and search for the job seeker using the instructions for updating an SSN.
8. Complete the individual's registration once the pseudo SSN has been verified.
9. Update the individual's case notes stating the reason for assigning a pseudo SSN.

Immigrant Eligibility
The determinations for establishing immigrant eligibility are:
- Designated English Language Learner
- Faces multiple cultural barriers

In addition to the questions to determine immigrant eligibility during the CalJOBS Individual Registration, program staff must:
- Answer *Yes* for English Language Learner under the Individual Barriers section.
- Answer *Yes* for Cultural Barriers under Barriers to Employment section of the Immigrant Eligibilities for Cultural Barriers of the *WIOA Title I –Youth, Adult, and/or Dislocated Worker Application* (See Figure 13).

Figure 13 CalJOBS Participant Demographics-Immigrant Eligibilities

English Language Learners
An English language learner is an individual whose primary language is not English. To determine this eligibility, the selection should be *Yes* for the question(s) (Figure 14):

Do you have limited proficiency in speaking, writing, reading, or understanding English?
        or
Do you have difficulty in speaking, writing, reading, or understanding English?
(located in the Ethnic Origin of the Individual section of the Individual Registration process.)

Figure 14 CalJOBS Participant Demographics- Primary Language

Once *Yes* is selected, additional questions will populate (Figure 15). Participants or program staff should make the selections that most accurately describe the participant

Figure 15 CalJOBS Participant Demographics

Participants/program staff will select participant's primary language for the question (Figure 16):

Figure 16 CalJOBS Participant Demographics-Primary Language

Accessing the Grant ID
Once the application is complete, program staff will arrive at the final page, which contains a list of programs in which to enroll the individual (Figure 17). The WIOA Title I programs are located at the top of the page and non-WIOA Special Grants (state-funded programs) are located the bottom half of the page.

Figure 17 CalJOBS Program Eligibility (top half of page)

Program staff will scroll down this page to view additional funding streams.
When scrolling down, the participant's eligibility status for Non-WIOA Special Grants (state-funded programs) will show as *Not Applicable* (Figure 18). This *does not affect enrollment* in the grant program.

Figure 18 CalJOBS Program Eligibility (bottom of page)

Take the following steps to enroll the individual in a state-funded initiative (Figure 19).

1. Select *YES* to the Non-WIOA Special Grants option.
2. A list of Non-WIOA Special Grants will appear where program staff can locate Grant ID *Participants Only*.
3. *S*elect the correct Grant Name and then *Add* (located at the far right of the page) under the Action column of the Grant Type table.

Non-WIOA Grants

| Non-WIOA Special Grants: | ● Yes ○ No ○ Not Applicable | ☐ Inactive |
| Local Funded Grants: | ○ Yes ○ No ● Not Applicable | ☐ Inactive |

Grants

No grants have been added.

Select from the list of available grants.

Grant Type	Grant ID	Grant Name	Local Grant Code	Date Added	Action
NonWIOA Special Grant	188	HIGH GROWTH & EMERG IND	150		Add
NonWIOA Special Grant	354	2023 - Prop 39 Cohort 2.0 Adult Participant Only	2023		Add
NonWIOA Special Grant	402	AB 2060 3.0 Participants	2045		Add

Current Case Manager: Case currently Not Assigned to a Case Manager
Assign Case Manager

Assign Me
Remove Case Manager Assignment

Previous Case Manager:

Figure 19 CalJOBS Program Eligibility- Non WIOA Special Grants

Once the grant has been added, the screen will look like Figure 20 below. The selected grant appears in a new table with *Remove* listed as an option under the Action column on the far right. The *Remove* prompt can be selected if the Grant ID is incorrect. Press *Remove* under the Action column and then select the correct grant.

Once the proper grant is selected, select *Finish* at the bottom of the page, and the individual will be enrolled in the program.

Figure 20 CalJOBS Program Eligibiilty - Non WIOA Grants

Co-Enrollment

Co-enrollment occurs when a participant is enrolled in more than one state or federal program. Eligibility questions must be completed for *each* CWDB funded program a participant is enrolled in. Further guidance will be provided regarding co-enrollment in state-funded programs where Fiscal Agents/Grantees are not utilizing CalJOBS to report participant data with the rollout of additional data systems (i.e., Cal E-Grants).

Co-enrollment may change depending on specific circumstances. For example, if an organization is the recipient of two different state-funded grant programs (e.g., P2E and HRCC RWF) and wants to co-enroll a participant in both programs, in most instances the organization can review the WIOA Title I application to ensure the participant meets eligibility requirements for both grant programs and add the grant codes to the participant WIOA Title I application.

Alternatively, if Organization A is a grantee of the P2E grant program and Organization B is a grant recipient of HRCC RWF, and both organizations want to co-enroll a participant, in most cases, Organization A and Organization B will *each* need to create a WIOA Title I application for the participant, who will have two WIOA Title I applications.

The Fiscal Agent/Awardee is responsible for ensuring that all services provided to participants co-enrolled in different programs are *strategically provided and not duplicated*. Strategic co-enrollment requires coordination between all programs the participant is enrolled in to avoid duplication of services and costs. If there is an overlap, each program must identify which services are being provided, where there may be an overlap, and where each service fits into the Individual Employment Plan/Service Strategy. With participants co-enrolled in as many programs as possible, program staff have greater flexibility to fund and share the responsibility

for the services that help participants meet their goals and objectives while participating in the program(s).

Note: If the participant is co-enrolled in other programs, such as WIOA, the participant *must meet all programs' eligibility criteria.* Many federally funded programs require collecting and recording right-to-work documentation for participants. For questions regarding participant co-enrollment, please contact the Research Unit..

Questions regarding Formerly Incarcerated
To capture which disadvantaged populations might benefit from the state-funded grant programs, a series of related justice-involved questions have been added to the WIOA Title I application. The questions should be answered if a participant has been involved in the justice system.

Complete the questions as shown in Figure 21 if the participant has no current or previous involvement with the justice system.

Figure 21 Justice-Involved Questions

Data Verification and Self-Attestation
Fiscal Agent/Awardees are expected to have the proper verification documentation available to support the information entered in CalJOBS.

Acceptable forms of income verification and other data verification documents include but are not limited to:
- Most recent pay stubs
- Tax documents
- Public assistance award letters

If a participant cannot obtain documentation, Self-Attestation forms will be accepted. A Self-Attestation form allows the participant to vouch for the document without the help of a public notary and usually involves confirmation of a particular data element, such as low income.

The Self-Attestation form must include:
1. The participant's self-identification of their status for permitted elements.
2. The participant's signature and date attesting to this self-identification.

Note: Self-Attestation should only be used as a *last resort* when providing documentation is unavailable. Please contact the CWDB through the Research Unit with any questions.

Grant ID and CalJOBS Activity Codes

Each grant program has a unique and specific Grant ID (Code). This Grant ID/Code is attached to participant's WIOA Title 1 applications will be used to enroll participants and track activities under the grant program. All participants and activities will be tracked under the appropriate Grant ID/Code assigned to a specific grant program.

Fiscal Agents/Awardees must record all data regarding services provided to the participants through the initiative (grant program) by using the CalJOBS system. In CalJOBS, the services provided are referred to as "Activity Codes". Activity Codes are three-digit codes associated with each of the specified services.

The eligible activities under state-funded initiatives include, but are not limited to:
- Basic Skills and Adult Education
- Earn and learn training
- English language improvement training
- High school diploma and GED acquisition
- Industry certifications
- Mentoring
- On-the-job training
- Basic career services
- Individualized career services
- Other remedial education and work readiness skills
- Pre-apprenticeship programming
- Skills and vocational training (that align with regional labor market needs)
- Stipends for trainees
- Supportive services
- Work experience

Allowable activities and use of funds are dependent on what is outlined within each project's budget and approved by the CWDB through contract execution.

Local Service Provider

As a best practice, add the program partners delivering services as Local Service Providers as early as possible. If necessary, program staff can enter activity codes without providing Local Service Provider information by bypassing the tab, if necessary.

Fiscal Agents/Awardees should include Local Service Provider information for any training or educational Activity Code. If the Fiscal Agent/Awardee is the Local Service Provider, the Research team can assist with registering their organization as a provider and then linking or activating their local provider account for easy access. Please contact the CWDB [Research Unit](#) for assistance with linking a local provider account in CalJOBS.

Applying to become a provider in CalJOBS

1. Select the *Not Registered Yet* link directly under the Username and Password log-in fields if the training or educational provider does not already exist in CalJOBS.
2. Choose *Provider* in Option 3 – Create a User Account*. Please include a **valid** email address when creating the user account.
3. Once the User Account is created, the staff member will be directed to enter additional details. **Note:** If a Local Provider is on the ETPL, once the provider details have been entered, the Local Workforce Development Area's (LWDA) ETPL Coordinator will be automatically notified that the local provider is registered in CalJOBS.
4. CWDB will review the information entered for completeness and accuracy for specific state-funded grant programs and link or activate the Provider application.
5. Receive notification of approval by email.

Adding Activity Codes

1. Select the *Create Activity/ Service/ Enrollment* link on the Activities/Enrollments/Services ribbon.
2. Select the correct *Customer Program Group*.
3. Select the *LWDB Region* (your LWDB Region). The Office Location is your office/agency name. Please review Directive [WSD20-01](#) to locate the correct region. **Note***:* Most CBO regions are considered 'Code 99' WIOA Statewide Grant Contractor.
4. Scroll to Enrollment Information.
5. Select a *Grant* for this activity. **Note:** If a Grant is not selected, the activity code will not appear on the report for the grant program/grant code.
6. Click S*elect Activity Code*, which will generate a pop-up box with a list of possible activity codes.
7. Select the appropriate *Activity Title* (the title will fill into the Activity Code box).
8. Enter an *Actual Begin Date*.
9. Enter the *Projected End Date*. (The date can be changed or pushed out if necessary) **Note:** If an activity code is not correctly closed, and there is no activity in CalJOBS for 90 calendar days, the system will "System Close"* and may result in a Soft Exit. A Soft Exit will exit the participant from the program, even though the participant is still receiving services from the Fiscal Agent/Awardee.
   * If services (except post-program/follow-up services) must be provided to an applicant who has been system-closed, the application intake process must be entered again.

10. Create and enter case notes, add comments, and assign case manager in the Staff Information section.
11. Select *Next* to save information. **Note:** Once Next is pressed, the activity code is created and added to the individual's activity table.

For CalJOBS Activity Codes' duration, refer to the CalJOBS Activity Codes Detailed Listing – Individual of the Directive, [WSD19-06](#).

Order of Activity Codes
Add activity codes associated with the services provided in the following order:
- Initial assessment
- Individual employment plan (IEP)
- Activities/services
- Measurable skill gains
- Credential attainment
- Post-Exit outcomes

Initial Assessment
CalJOBS Activity Code 102 - Initial Assessment is the first activity code that must be entered. If this activity is provided by program staff and not another organization, the Service Provider tab can be skipped.

Program staff should include a case note explaining the assessment type provided and the evaluation outcomes. Activity Code 102 can be kept open for one day.

Individual Employment Plan (IEP)
The Individual Employment Plan documents a participant's employment objectives, goals, service strategies, and completion status while participating in the grant program. *An IEP is required for each participant and must be completed within 30 days of enrollment.*

An IEP allows program staff and the participant to establish defined goals for employment, training, and skill needs.

An IEP provides the ability to:
- Develop a professional plan.
- Define a goal.
- Obtain employment/training/skills.
- Set objectives for the goal.
- Review completed services and activities concerning the goal.
- Develop employment plans and service strategies.

Completed IEP goals can be printed and signed by both staff and the participant to serve as a type of contract of expectations. The IEP will be reviewed at estimated dates of completion.

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The IEP should be regularly reviewed and updated until the participant exits the program.

How to Create an IEP

1. Find the IEP in the Plan link under Staff Profiles > Case Management Profile.
2. Locate the Plan tab at the mid-point of the page and select *Create Individual Employment Plan/Service Strategy.* **Note***:* An individual can only have **one** IEP open at a time. However, the IEP can be used by both Title I and Title III staff for case management. Multiple goals and objectives may be added to an IEP.
3. Select *Edit* to add, update, or close an IEP.
4. Complete the required Plan Information fields by adding information in the *Enter the Plan Start Date, LWDB/Region,* and the *Plan started in the office location* tabs. This identifies in which office the plan originated. **Note:** Do not enter information in the Plan Closed Date. Once closed, this action cannot be undone.
5. Select *Add New Goal* beneath the IEP/ISS Goals table. A new form will populate to enter goal information.
6. Add goals to the plan.
   Note: Staff can create multiple goals within the IEP.
7. Select *Type of Goal and Term of Goal* (duration) from the dropdown lists.
8. Enter a short *Description of Goal* in the text box provided. This will be the title of the goal.
   Note: Use the Details box to enter more detailed information about the intended goal.
9. Add *Goal Objectives.* (Program staff can create multiple objectives within the IEP.)
10. Enter the *Date Established* (when the goal is initiated).
11. Enter an *objective description* in the text box.
12. Leave the Actual Completion Date blank.
13. Select the Reason Closed as *None Selected .*
14. Select the Completion Status as *Open.*
15. Type any details or comments in the Objective Details text box.
16. Select *Save* to complete the objective.
17. Close the IEP.
    Note: Start from right to left by closing the objectives, the goals, and the plan.
18. Enter the second CalJOBS activity *Activity Code, 205 – Development of IEP/ISS/EDP* after completing the Initial Assessment.
19. Skip the Service Provider table if this activity is provided by program staff and not another organization.
    Note: The duration for Activity Code 205 to be kept open is one day.

Activities/Services

Appendix II of this document includes a link to the CalJOBS Activity Code Dictionary, which includes the federal program definition. Program staff should use the CalJOBS Activity Code Dictionary that most accurately and closely corresponds to the services rendered. The activity codes associated with services should be entered according to the services rendered.
For additional questions about activity codes for the grant, contact the CWDB Research Unit.

Measurable Skill Gain (MSG)

A Measurable Skills Gain (MSG) is a performance indicator that tracks a participant's *interim* progress. A MSG is required for each participant enrolled in an education and/or training program. This enables program staff to track and report participants' progress and performance in the program. It is intended to capture important education or training progressions in "real time." It is NOT an exit-based performance indicator.

Programs that enroll individuals in education or training programs must specify and document the progress that participants are achieving (academic, technical, occupational, or other progress toward a credential or employment) in their program.

There are five types of MSGs. Program staff must select and document the appropriate MSG in which the participant is enrolled.

MSG Types

- **Educational Functioning Level** (**EFL**) –Appropriate for participants designated as English language learners or basic skills deficient and who gain at least one EFL as established by a pre-test and post-test.
- **Secondary School Diploma** - Appropriate for participants who do not have a secondary school diploma or equivalent at program entry.
- **Transcript/Report Card** –Appropriate for participants enrolled in an education program such as high school or community college.
- **Training Milestone** –Appropriate for participants enrolled in on-the-job training (OJT), registered apprenticeships, or work experience.
- **Skills Progression** –Appropriate for participants enrolled in an occupational skills training program.

Documenting an MSG

1. Locate the MSG section in CalJOBS. **Note:** The MSG section can be found under *Case Management → Programs → Title 1 – Workforce Development (WIOA)* tab by expanding the menu using the plus (+) function on the left-hand side.
2. Expand the Measurable Skills Gain tab and select *Create Measurable Skills Gain.*
3. Under General Information, select the *Region* and then select the appropriate organization from the *Office Location drop-down menu*.
4. In the Skills Attainment Information section, select the appropriate MSG option from the *Skill Type drop-down menu*. **Note:** For more information on MSGs, refer to pages 13-16 of WSD22-01.
5. Enter the *Date Skill Attained* field.
6. Under Type of Achievement, select the *appropriate achievement* for the individual.
7. Select *Verify* to indicate what documentation was used to verify the MSG.
8. Upload documentation in CalJOBS if that is the organization's method of retaining records.
9. Enter a case note to document that the MSG was obtained and relevant documentation was collected. **Note:** The case note can be entered with *Activity Code 106*—e.g., *"Program staff met with the participant to collect documentation related to MSGs."*

10. Enter *Save*.

Credential Attainment

Program staff must document credential attainment for enrolled participants in education or training programs within the grant term. Credential Attainment is a performance indicator required for participants enrolled in education or training programs.

Participants are expected to attain the appropriate credential for the education or training program in which they are enrolled. **Note***: Participants have up to *one year after the program exit* to receive their credential.

How to Create a Credential
1. Enter the credential attainment information in the *Credentials* ribbon.
2. Expand the gray Credentials ribbon and then select the *Create Credentials* link.
3. In General Information, select the *appropriate Region*, then choose the organization from the *Office Location drop-down menu.*
4. Select the appropriate credential attainment option from the Credential Information section.
5. Verify the credential in the Credential Verification field and upload the documentation in CalJOBS. **Note:** If the Verify link is not selected, the statement "Copy in Case File" will appear.
6. Complete the *Date Credential Received* field.
7. Select the *Search Activities* field. **Note:** Although not marked with a red asterisk, first go to the *Associated to Activity* field to associate an activity to a credential received.
8. Click S*elect* from the Action column to select the appropriate activity code, and the information will populate into the *Associated to Activity f*ield.
9. Select *Save.*
10. Provide case notes for each activity code entered. **Note***: Activity Code 106* must be entered when a credential is obtained. An example of an accompanying case should read: "Program staff met with participant to collect documentation related to obtaining a credential."

Case Notes

Case notes tell the participants' story from entry to exit. **Every activity code entered must have an accompanying case note.** Program staff can insert the case note toward the end when opening an activity code.

The case note should:
- Capture the Activity Code (AC) in the title (e.g., *AC 412 – Objective Assessment*.
- Indicate the Date of Service (*not* the date the case note is entered).
- Detail the who, what, when, where, why, and how in the case note.
  - Who delivered the service?
  - Who received it?

- o What type of service was provided (e.g., training, workshops, supportive services, etc.)?
- o When was it provided (date/hours)?
- o When will it be completed (duration)?
- o Why was it provided (purpose)?
- o How will this benefit the participant?

Additional suggested details for activity types are listed below. (Program staff may provide additional case notes if needed.)

- **Training:** type(s) of training to attend, where (name and location), skills/competencies to obtain upon completion, and duration of the training.
- **Education:** name of course, where taken (name and location), type of certification/degree/diploma to receive upon completion, and duration of practice (s).
- **Referral:** reason for referral and where referred (name and location).
- **Enrollment into Partner Program:** program and agency name(s).

Example: A case manager enters the Activity Code *301 On-the-Job Training* for a participant with the case note heading of *On-the-Job Training*. The case note should include the following details:

Participant A starts on-the-job training today (MM/DD/YYYY) at Manufacturing X. Manufacturing X is located at 5555 Parkway, Sacramento, CA 95838. Participant A will learn manufacturing, processing orders, and customer service skills. Participant A receives 200 hours of OJT and will work 20 hours per week. The tentative end date is MM/DD/YYYY.

Example: Case note for Pre-Apprenticeship Training enrollment:

Title: *AC 307: Pre-Apprenticeship Program w/ Occupational Skills Training (ITA)*
Date: *10/5/2020*
Case Note: *John Doe was enrolled into Agency X's Apprenticeship Preparedness Program (APP) on 10/5/20 to obtain an industry-valued certificate/credential, which will prepare him for entry into the construction trades. APP is a 240-hour (9-week) pre-apprenticeship program that offers a Multi-Craft Core Curriculum, basic math, hands-on learning, field trips, and mentorship, among others. The training will occur Mondays to Thursdays, 9:00 am – 3:30 pm and will be completed by 12/3/20.*

Example: Case Note for Supportive Services:

Title: *AC 181: Supportive Services: Transportation Assistance*
Date: *10/5/2020*
Case Note: *John Doe was provided ten bus passes on 10/5/2020 for round-trip travel to the Apprenticeship Readiness Program (APP) from 10/5/20 – 10/8/2020. APP provides pre-apprenticeship training and will help him obtain an industry-valued certificate/credential to prepare him for entry into the construction trades.*

Note: Some case notes will not require an Activity Code. For example, if a case manager checks in with a participant after a job interview, the activity can be documented as a stand-alone case note.

Example: Case note not associated with an Activity Code:

Title: Check In
Date: 10/9/2020
Case Note: Case Manager called John Doe on 10/9/2020 after his first week of the Apprenticeship Preparedness Program (APP). John shared he enjoyed learning from the instructors, and the content was valuable. The bus passes have also helped him get to and from training easily since he has no income. John is looking forward to the field trip to the Local International Brotherhood of Electrical Workers next week.

Case Closures, Exits, and Post-Exit Outcomes

When a participant completes the program, has met the employment objectives/goals under the program, and requires no additional services, program staff can determine if closure of the program is appropriate. A closure is manually entered by staff and ends the participant's presence in the program *but does not exit them* from it. If there is no open Activity Code or all activity codes have been closed, CalJOBS will soft exit the participant on the 91st day.

How to Create a Case Closure

All activities must be closed before a case closure can be created.

Take the following steps to create a case closure for each participant.
1. Access participant's case.
2. Expand the Title I application by clicking on the box with the plus sign on the upper left corner of the box (Figure 22A).

Figure 22 A Link to Participant's Completed WIOA Application

3. Expand the *Closure* tab.
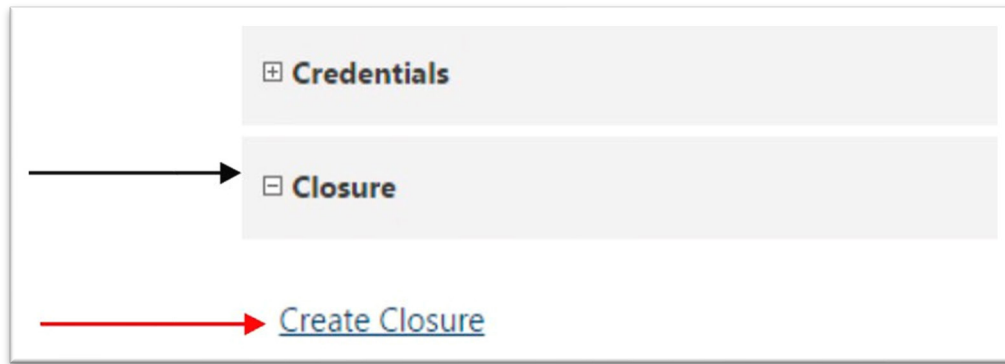4. Select *Create Closure.*

Figure 23 Closure Tab for Creating a Case Closure

5. Enter the required information indicated on the form.

Entering employment/placement information when creating a case closure is *mandatory*.

Program Exit/ Exit Date
Common or Soft Exit
A program exit or exit date is the last **date of service**, not the last day of the Exit Clock. The Exit Clock begins the last date a service is provided. An exit is automatically generated by the system when there has been a 90-day lapse in service across all programs with no future services scheduled. This is referred to as a c*ommon* or *soft exit* and is determined by the last date a participant received Title I services in any program in which they are enrolled.

Ensuring activities recorded in CalJOBS reflect the true provision of services with accurate start and end dates is important as it allows an appropriate exit from program services without issues. If additional services are required after a case closure has been created, the case closure shall be deleted and the 90-day exit clock (if it has not been 90 days) will reset.

Tip: Set reminder alerts in the CalJOBS system to signal that a participant is nearing the 90-day lapse in service. If there is an anticipated break in service that will last longer than 90 days, it is possible to plan a future activity code (e.g., upcoming training) with only a projected start date to ensure a participant is not automatically exited from the program.

Exclusionary or *Hard Exit* occurs when a participant cannot continue in the program due to reasons including but not limited to institutionalization, death, health/medical reasons, etc. Under this exit, program staff must manually enter the exit into the system by creating an Outcome in CalJOBS. Follow the same steps for creating a case closure but select *Create Exit/Outcome* option instead of Closure. If there are no applicable exit reasons in the options provided, the participant may not qualify for a hard exit.

For participants who are co-enrolled in other programs through the WIOA Title I application, the date in which a participant stops receiving services through a state-funded initiative may not represent an exit if the participants continue receiving services through other programs.

Example: A participant is co-enrolled in both a WIOA Title I program and a state-funded initiative through the WIOA Title I application. The participant is not officially considered exited until they have completed both programs. The outcomes that occur past exit will not begin until the completion of *all* programs under the WIOA Title I application are final.

An exclusionary/hard exit is allowed under a few circumstances. Program staff should enter a case note justifying the exit, and if available, include supporting documentation in the participant's hard file.

Post-Exit Outcomes

To fulfill the CWDB's statutory reporting requirements, post-exit outcomes are tracked utilizing the existing performance monitoring systems and metrics governing relevant programs and outcomes for individuals that have transitioned into the broader system. The particular outcome data being tracked and analyzed include:

- Completed training(s)
- Industry-identified certificate(s) or credential(s)
- Pre-Apprenticeship and/or state-registered apprenticeship (occupation and specific apprenticeship program(s) must be tracked at the individual level)
- Post-secondary education enrollment
- Placement and placement retention

For employment/career placement or advancement, a participant's occupation and industry/sector must be individually tracked. Placement retention will be measured six months after apprenticeship, post-secondary education, or employment placement.

Reporting Participant Data to the CWDB

Progress Reports

Progress Reports/Narrative Reports are due on a quarterly or semi-annual basis depending on the grant program. This reporting is separate from the data entered into CalJOBS. Please refer to the Grant Administration Guide for more detailed information on submitting Progress/Narrative Reports. The Progress/Narrative Report should provide details on how the project has progressed, any barriers that have been encountered, lessons learned, etc.

Other reports outlined in the following CalJOBS Reporting section may be requested as needed and fall outside of the reporting calendar by the CWDB. Fiscal Agent/Awardee must ensure this data is readily available upon request. CalJOBS reports must be run regularly and proactively to track project movement and ensure participant data in the system reflects accurate and up-to-date work for the organization.

- Participant data on CalJOBS should match with data tracked internally. If there is a discrepancy, an explanation must be provided in the Progress Reports/Narrative Report. Explanations should include the discrepancy reason(s), what steps are needed to resolve the issue (if applicable), and the projected time to resolve the issue.

- Participant data not captured through activity codes and/or enrollment process in CalJOBS should be recorded in the supplemental report spreadsheet that will be emailed. The Fiscal Agent/Awardee can determine the best method to collect the information requested in the supplemental report spreadsheet. The collected data must be corroborated by the Fiscal Agent/Awardee and be properly documented (e.g., case notes and supplemental report).

Explanation of CalJOBS Reports

Several types of reports can be generated in CalJOBS after participant data is inputted.

Enrolled Individuals Reports

This report provides a list of individuals enrolled in a program. It captures the following data: participant name (first and last), age, phone, email, address, city, state, country (location), office location, agency code/name, assigned case manager, active date, exit date, prior participation, and military separation.

Predictive – Grant Participants Report

This report captures the following data: participant name (first and last), age, gender, responsible office, assigned case manager, participation date, grant enrollment date, last grant activity date, and project grant activity date, end date, received credential, and entered employment.

It also includes:
- *Grant Funded Services*: Career Services, Education/Training, OJT, Work Experience, Supportive Services, and DWG Disaster Only.
- *Program Co-Enrollment*: WP, AD, DW, RR Add. Assistant, Youth, DWG, IWT, Non-WIOA Grant, Local Grant, TAA, NFJP, Other.
- *Ethnicity/Race*: Hispanic, American Indian/Alaskan Native, Asian, African American/Black, Native Hawaiian, White, Multi-Racial.
- *Other Demographics*: Eligible Veteran, With Disability, Unemployed, Underemployed, Dislocated Worker, Incumbent Worker.
- *Education Level*: No School Level, Secondary School Graduate, 1+ Years of Post-Secondary Education, AS/AA Degree, BS/BA Degree, Beyond BA/BS Degree.
- *Employment Barriers*: Displaced Homemaker, Low Income, Older Individual, Ex-Offender, Homeless/Runaway, Foster Care Youth, Basic Skills Deficiency/English Leader, Exhaust. TANF, Single Parent, Long Term Unemployed.

Services Provided Individuals Report

This report shows specific services provided to the individual by program staff. It can be filtered by service type. The report will display the grant number, grant description, activity code, activity description, distinct users, and total. (Figure 24)

Services Provided Individuals - by Grant
- Region/Lwia: Alameda County Workforce Development Board
- Grant Type: Statewide Adult
- Grant: 645 - 1129 - SlingShot - Construction Pre-Apprenticeship Pipeli
- Veteran Information From: Both
- Date Field: Create Date
- Start Date: 6/1/2018
- End Date: 12/31/2019

Grant Number	Grant Description	Activity	Activity Description	Distinct Users	Total
1129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	101	Orientation	7	7
1129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	133	Job Search Workshop	1	1
1129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	203	Objective Assessment	17	17
1129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	205	Development of IEP/ISS/EDP	10	12
1129	1129 - SlingShot - Construction Pre-Apprenticeship Pipeli	328	Occupational Skills Training (non-ETPL provider, non-formula)	4	4
Grant Number	Grant Description	Activity	Activity Description	Distinct Users	Total
				39	41

Total Rows: 5

Figure 24 Sample Services Provided Report

Other Reports

- *Individual Case Notes* - Pulls case notes entered by staff in an individual's profile.
- *On-Line Characteristics* – Filters by data element associated with WIOA, such as WIOA application, participation, enrollment, case closure, case outcome, and follow-up.
- *Credentials Report* –Displays all credential records entered. (The Predictive Report can pull this.)
- *Credentials Required* – This can be a proactive approach to follow-up on credentials that have not been entered or should be entered.
- *Case Closure Reportable Performance Indicator* –Shows performance indicator information: credentials, school status, diploma, and employment placement. Note that these elements are also captured in the Predictive Report.
- *Targeted MSG/MSG Required* – These reports can be a proactive approach to ensure staff collect upcoming or past due MSGs.
- *Soon-to-exit to Exit Cases Report/Projected End Dates Report* –Assist with staying ahead of soft-exits and system closed activity codes.

The goal of this data guide is to ensure all data outlined is captured and reported correctly in CalJOBS to evaluate the effectiveness and outcomes of the program. The Fiscal Agent/Awardees are responsible for ensuring all participant data is entered correctly and timely into the CalJOBS system to capture and measure data as accurately as possible.

This document is a reference tool for entering data into the CalJOBS program and provides parameters of what is expected in terms of entering data. The Fiscal Agent/Awardee must keep

the CWDB updated with any issues that arise concerning data entry. They should promptly request technical assistance if they are unable to resolve an issue on their own.

Program staff seeking general information regarding CalJOBS should refer to the resources listed in Appendix IV of this document. For non-participant data inquiries, please contact the grant-specific general inbox located in the Grant Administration Guide.

Appendix I. Personal Information Notice

Effective Date: 09/12/2023

The California Workforce Development Board (CWDB) administers its programs as authorized by current legislation. It collects Personal Information (as defined in CWDB's Privacy Policy), including name, social security number, birth date, and address.

Providing this information is mandatory. Without it, the CWDB cannot complete program evaluation and participant eligibility effectively. The CWDB collects Personal Information for:

- Program Evaluation
- Participant Eligibility

Any organization that submits Personal Information to CWDB or its service providers represents and warrants that:

- It has the authority to disclose the information and use the information in accordance with this Notice of Collection and
- The information provided is accurate.

Appendix II. Activity Codes

Appendix II provides definitions for eligible activities in CalJOBS and includes information on entering data on services provided under the initiative (grant program) into the CalJOBS system. The tables in this section should be used as a general guide for Fiscal Agents/Awardees. Fiscal Agents/Grantees should prioritize the activity codes below and select the code that most accurately corresponds to the services rendered. If a service is not listed below, please find the most appropriate activity code in the Directive WSD19-06 (complete list of CalJOBS activity codes). For guidance in selecting an activity code, contact the Research Unit for assistance.

Refer to CalJOBS Activity Codes Detailed Listing-Individual (Attachment Number 2) of the Directive, WSD19-06, to view the duration (in days) for which the activity code can be kept open.

Program staff are required to enter participant information into the CalJOBS system. Managers, staff, and Management Information System (MIS) administrators can change active participant data within 30 days.

After 30 calendar days, the CalJOBS system does not allow specific areas of the participant record to be changed or updated. When this occurs, a Data Change Request form must be completed to enable the participant data to be changed or updated. Its purpose is to correct data key entry errors and other circumstances beyond program staff's control. For more information on the data change request procedure, refer to the WSD18-02.
For further assistance, please contact the CWDB Research Unit.

The code definitions will reference to terms that are used in WIOA programs.
Some code definitions refer to the Employment Training Provider List (ETPL). For more information about ETPL, refer to Directive WSD21-03.

When entering an Activity Code for a participant enrolling in industry certification, program staff should be familiar with and follow the guidelines outlined in the Directive WSD19-03.

For a full list of activity codes and their definitions, please review the Activity Code Dictionary available through EDD. The eligible activities under most initiatives include, but are not limited to:
- Basic skills and adult education
- Earn and learn training
- English language improvement training
- High school diploma and GED acquisition
- Industry certifications
- Mentoring
- On-the-job training
- Basic Career Services

- Individualized Career Services
- Other remedial education and work readiness skills
- Pre-apprenticeship programming
- Skills and vocational training that aligns with regional labor market needs
- Stipends for trainees
- Supportive services
- Work experience

Appendix III. Data Change Requests

Submitting a Data Change Request (DCR)

If data requires modification or addition after the initial thirty (30) days of service, the Fiscal Agent/Awardee must notify the CWDB's Research Unit via email before initiating the DCR process. The Fiscal Agent/Awardee is responsible for keeping the CWDB apprised of all submitted DCRs and the outcome of the request(s). Any DCRs submitted after the grant term end date will not be accepted.

Once the appropriate forms are completed, the Fiscal Agent/Awardee will submit them by email to the Central Office Workforce Services Division (COWSD), Program Reporting and Analysis Unit (PRAU).

Note: The CWDB Research Unit inbox must be copied with the original correspondence and will be included in all email correspondence regarding DCR until the process is finalized. The email initiating the DCR should include "CWDB Program-Fiscal Agent/Awardee-Data Change Request" in the subject line.

Step 1: Accessing the Data Change Request (DCR) Form

The directive with downloadable DCR forms can be found on the last page of Directive WSD18-02. CWDB's Fiscal Agents/Awardees will use Attachments 1 and 3.

Step 2: Fill out the DCR Form

The DCR form has the three sections:

Section I: Requestor's Identifying Information

This section requests general contact information items. This information is required even if the Management Information System (MIS) Administrator and requestor are the same individual. (Figure 25)

Figure 25 Section I of Data Change Request Form

Section II: Detailed Reason for Requested Correction Section
This section solicits the details necessary to complete the request:

Figure 26 Section II of the Data Change Request Form

Make the appropriate selection from the *CHOOSE AN ITEM* drop-down menu of the areas that need to be corrected. If multiple changes are needed for one participant, select one change from the drop-down menu and include all the changes in the details section.

Include the applicant's name, program name, application number, and policy and procedure that staff will follow to avoid similar errors in the future.

Note*:* Never include a participant's complete social security number.

Section III: Authorized Signature Section
The Requestor, MIS Administrator, and Executive Director will all sign the document. If no MIS Administrator is available, the Requestor should sign in both their field and the MIS Administrator field. All three signature fields must be completed, or the request will be denied.

Figure 27 Section III of the Data Change Request Form

Step 3: Attaching DCR Supplemental Document

Requests for more than three (3) data changes must be listed on the DCR Supplemental Spreadsheet. The spreadsheet must include, at minimum, the program name, application number or State ID, participant's first and last names, and an explanation of corrections needed

Supplemental Spreadsheet

The spreadsheet must include the application number, program name, state ID, participant's last and first names, grant code (if applicable), activity code (if applicable), correct and incorrect dates, and comments/instructions (an explanation of what needs to be corrected). (Figure 28)

The DCR Supplemental Spreadsheet should be submitted in its original Excel format (not in PDF or any other format) and must be accompanied by the signed DCR Form.

A blank, downloadable DCR Supplemental Spreadsheet can be found here: Data Change Request Supplemental Spreadsheet

Application #	Program Name	State ID	Last Name	First Name	Grant Code (if	Activity Code	Incorrect Actual Begin	Correct Actual Begin	Incorrect Actual End Date	Correct Actual End Date	Comments / Instructions

Accompanying Spreadsheet for the DCR Form — Attachment 3

Figure 28 Blank Supplemental Spreadsheet Example

Figure 29 Completed Supplemental Spreadsheet Sample

Note: Color coding based on the type of change (as shown in Figure 29) is recommended but not required.

Approval Consideration Process

The following guidance is provided directly by EDD's Program Reporting and Analysis Unit (PRAU) regarding the DCR approval process.

Please also reference EDD's Data Change Request Procedure for more details.

Any requests associated with data beyond 90 days will be thoroughly reviewed and may not be approved. Upon receipt of a fully completed DCR form, the PRAU will review the request and analyze the overall impact of the proposed change. Each request will be considered case-by-case, contingent upon the detailed reasons listed and the supporting documentation provided.

If additional information is required, PRAU will email the Fiscal Agent/Awardee directly for clarification. The Fiscal Agent/Awardee must reply to the PRAU message within seven (7) calendar days, or the request may be denied. All replies must include the entire email thread and all attachments throughout the DCR processing period.

If the DCR is approved, PRAU will respond to the Fiscal Agent/Awardee of the approval and make the requested changes. The Fiscal Agent/Awardee is responsible for verifying that the changes made by PRAU are accurate.

If the DCR is denied, PRAU will notify the Fiscal Agent/Awardee of the denial and provide reason(s) for the denial. In addition to the denial notification prepared by PRAU, the CWDB's PRL team must formally advise the Fiscal Agent/Awardee that all denied DCRs remain on file by the Fiscal Agent/Awardee for program evaluation purposes and monitoring.

MIS Administrators
- Only Local Areas have designated MIS staff who are granted "administrative" level privileges to manage specific CalJOBS data and system functions. These entities generally resolve data entry issues independently. Any DCR submissions should be communicated promptly to the CWDB to ensure that any data discrepancies are addressed and guidance regarding proper data capture is obtained.
- Community Based Organizations (CBOs) do not have MIS administrators and therefore, some limitations exist in adjusting data that has been entered. If a Fiscal Agent/Awardee is a COB experiencing data entry difficulties, they must contact the CWDB immediately for further assistance.

After thirty (30) calendar days, the CalJOBS system will not allow any Program staff to change or update certain areas of the participant record. The Data Change Request (DCR) form is a tool to enable participant data to be changed or updated and accurately reflect project outcomes. Its purpose is to correct data key entry errors and other circumstances beyond staff's control.

CWDB's general rule for all Programs utilizing the State's workforce management system is, *"If it is not in CalJOBS, it doesn't exist."*

All data capture inquiries, including DCRs, must be directed promptly to the [CWDB's Research Unit](#).

System Closed vs. Soft Exits

System Closed
Program staff must ensure records are updated in real time to the extent feasible, or a maximum of 30 calendar days of providing a service, to avoid a *System Closed* completion status. Once the activity becomes *System Closed*, the data cannot be changed or updated.

The CalJOBS system will close an activity if an Actual Begin Date has not been entered and more than 30 days has passed. To prevent the system from closing or completing an activity, the exact begin date must be entered into the system before 30 days elapses.
 The CalJOBS system will also close an activity if the Projected End Date expires and more than 30 days elapses. To prevent the system from closing an activity, the Projected End Date must be extended in the system before 30 days has elapsed.

Closing an activity in either circumstance will result in a *System Closed* notice.

Soft Exit
A participant's application is considered a *Soft Exit* after 90 calendar days of inactivity across all programs within CalJOBS, and when no new activity is pending or has been scheduled for the participant in CalJOBS. If a system exit occurs, (with the exception of post-program/follow-up services) the application intake process must be completed again.

A DCR is unavailable for re-enrollment when a soft exit has occurred.

Common Uses for Data Change Request
- Entering actual participant enrollment dates
- Entering accidentally omitted service/activity codes
- Requesting re-opening of *System Closed* activity codes
- Deleting data accidentally entered in the system

Data Change Request Cut-Off/Timeline

Before the end of the grant term, Fiscal Agents/Awardees should evaluate their projects to determine if DCRs need to be submitted for consideration. To ensure seamless and efficient processing, all DCR requests must be submitted 60 days before the grant term's end date. DCR requests submitted outside the listed timeframe or outside of the Program's grant term will not be accepted by the CWDB.

Notes and Best Practices
- Send the completed DCR and spreadsheet, if applicable, to the CWDB Research Team for review before sending to EDD.
- Once reviewed by the CWDB Research Team, you will send the completed DCR to EDD.
- Detailed guidance on completing the DCR can be located in the Data Change Request Form Directive, WSD18-02.
    - It is highly recommended that the requestor review the directive to ensure the DCR is properly completed.
- For additional questions, please contact the CWDB Research Team.

Appendix IV. References and Additional CalJOBS Resources

Statute and Report
- Assembly Bill 1550

Directives
- CalJOBS Activity Codes, WSD19-06
- Data Change Request Form Procedure, WSD18-02
- Employment Training Provider List, WSD21-03
- Performance Guidance, WSD22-01
- Pseudo SSN, WSD20-11
- Regional Planning Units, WSD20-01

CalJOBS
- CalJOBS Homepage
- EDD CalJOBS General Information