COUNTY OF SAN LUIS OBISPO
DEPARTMENT OF SOCIAL SERVICES
WORKFORCE DEVELOPMENT BOARD

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POLICY NO: 34-19

TO: Service Providers

FROM: Department of Social Services

EFFECTIVE: July 27, 2020, REVISED March 29, 2023

SUBJECT: CalJOBS Data Entry Policy

REFERENCES:

- Workforce Services Directive (WSD) 18-02 (Data Change Request Form Procedure)
- Workforce Services Directive (WSD) 17-09 (Mandated Use of VOSGreeter Module in CalJOBS)
- Workforce Services Directive (WSD) 16-23 (Mandated Use of One Integrated Data System – Direct Data Key Entry into CalJOBS)

PURPOSE:
The purpose of this policy is to provide guidance on data entry specifically for the California Job Openings Browse System (CalJOBS). CalJOBS is used by the 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 (WPA) and Trade Adjustment Act (TAA) participant reporting requirements. The Workforce Development Board of San Luis Obispo may implement additional requirements to better inform the community, boards, and partners around data analysis and performance reporting.

This policy will be reviewed and updated based on any additional federal or state guidance.

POLICY:
Service providers are required to report individual participant data via the CalJOBS system, the State's system of record.

PROCEDURES:

CalJOBS Staff Accounts:

To gain access to CalJOBS, every user must have their own staff account created by the Department of Social Services (DSS) WIOA Management Information Systems (MIS) staff

person. To request a new account for a staff member, the supervisor must submit a completed CalJOBS User Account Request (Attachment 1) and User Confidentiality Statement (Attachment 2) to the DSS WIOA staff listed on the form. Supervisors are required to notify the MIS Administrator staff person immediately upon any change in the employment status of a staff member (resignation, termination, suspension, extended leave, etc.) with submission of completed CalJOBS User Account Request (Attachment 1).

All CalJOBS accounts are subject to final approval by the DSS WIOA Program Manager and access to CalJOBS may be denied or revoked at the discretion of the DSS WIOA Program Manager.

CalJOBS Handbook:

The CalJOBS User Guide for Staff is an instruction and guidance manual on how and where to enter required participant data in CalJOBS. The handbook is located in the Staff Resources section of the CalJOBS website.

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 development, however, the handbook can also serve as a reference manual for experienced staff. Additionally, there is a Quick Reference Guide available for staff located in the Staff Resources section of the CalJOBS website.

Social Security Number:

A Social Security number (SSN) 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. Below is the process for entering a pseudo-SSN:
Enter: 975 (Local Area Assigned Identifier) – DD (Job seeker birth day) – DDMMYY (Job seeker's birth day, birth month and the last two digits of the job seeker's birth year) Example: If job seeker was born on May 25, 1977, their pseudo SSN# would be: 975-25-0577

Data Entry:

Service provider staff shall enter 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. Timely data entry is required, entry of applications, objective assessments, literacy/numeracy assessments, ISS/IEP, activities, case notes, measurable skills gains, closure forms, and follow-up forms must be entered within five (5) business days of the date the activity/service was provided. CalJOBS allows for data to be backdated up to 30-days by the service provider. Data may be backdated between 31- and 90-days pending approval from the DSS Program Manager and WDB Director and the Employment Development Department (EDD). Data cannot be backdated greater than 90 days of the current date. Once a case has exited, only follow-up activity codes can be entered.

<u>Help Requests:</u>

Service provider staff must complete a Help Request Form (Attachment 3) to modify data already entered in CalJOBS. This request is to be emailed to the MIS Administrator staff and DSS Program Manager listed on the form and must be sent by a supervisor/manager of the WIOA service provider. These requests must be approved by DSS WIOA Staff. Some requests also require approval by EDD.

Additionally, service provider staff shall notify the MIS Administrator, via email, of any issues encountered while navigating CalJOBS (system errors, staff access issues, password resets, connectivity issues, latency, etc.). The Help Request Form is not required for these notifications, however, in some instances the MIS Administrator may request one.

<u>Activity Codes:</u>

An activity code (also known as activity enrollment or service) is documented progress or a reciprocated communication between a case manager and a participant. 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 center and acknowledges the correspondence. Activity Codes must be used to document participant activity in a program. For a complete list of Activity Codes, refer to the CalJOBS Activity Codes Dictionary also provided as Attachment 4 of this policy. Supervisors should direct any questions related to activity codes to the DSS WIOA Program Manager.

<u>Case Notes:</u>

Service provider staff are required to utilize the Case Notes functionality within CalJOBS. A case note is 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, <u>and objective</u>. 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.

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 participant.

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 the event/activity being documented so that it may be understood by anyone reviewing the note. No opinions or comments of the case manager should be included. The subject line of an activity case note should be formatted to include the activity code number and title. The contact date for the activity case note should match the start date of the associated activity.

Case notes are required to be entered, at a minimum, once every thirty (30) days for each participant. Additionally, case notes are required to be entered within five (5) days of the contact date (or activity begin date for activity case notes).

Soft Exit:

A 90-day no service exit, or Soft Exit, occurs when intensive staff-assisted services have not been entered for at least 90 days. This action can occur with or without a Closure Form. This action cannot be reversed. Service providers are required to ensure that cases nearing the 90-day no service exit are reviewed to ensure that all activities, outcomes and documentation are complete and that the case is indeed ready to exit. A closure form must be completed for all cases nearing the 90-day no service exit.

Closure and 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.

Service provider staff must make follow-up services available for at least 12 months for all participants, regardless of intensity of services - unless the participant declines to receive follow-up services. Follow-up *case management* and data entry in CalJOBS are required quarterly. In the case the participant cannot be located or contacted, 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 the CalJOBS Activity Codes Dictionary.

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. According to EDD directive WSD17-09, use of VOSGreeter is a statewide requirement that applies to all AJCC locations. VOSGreeter must be used daily to accurately record AJCC visitors and their visit reasons.

ACTION:
All DSS WIOA staff and WIOA service providers shall comply with this policy. This policy will remain in effect from the date of issue until such time that a revision is required.

INQUIRIES:
Any questions regarding this policy may be directed to the DSS WIOA Program Manager at 805-781-1838.

ATTACHMENTS:
Attachment 1, CalJOBS User Account Request
Attachment 2, User Confidentiality Statement
Attachment 3, Help Request Form
Attachment 4, CalJOBS Activity Codes Dictionary

Workforce Development Board (WDB) Approval Required?   Yes   No <u>X</u>

Initial approval date: _____N/A_____

WDB revision approval date: _____