



A G E N D A

Orange County Workforce Development Board

May 29, 2024

10:00 A.M.

workforce.ocgov.com

Location:

Orange County Community Services
OC Workforce & Economic Development Division
1300 S. Grand Ave., Building B
Newport Conference Room #232
Santa Ana, CA. 92705

The Orange County Workforce Development Board shall not hold a meeting unless the number of members participating constitutes a quorum of the Orange County Workforce Development Board.

This agenda contains a brief description of each item to be considered. Except as provided by law, no action shall be taken on any item not appearing in the agenda. Members of the public who wish to speak on an item(s) may complete a Speaker Request Form(s) identifying the items prior to the beginning of the meeting. To speak on a matter not appearing on the agenda, but under the jurisdiction of this Advisory Board, you may do so during Public Comments. Speaker request forms must be completed prior to the beginning of the meeting, the reading of the individual agenda items and/or the beginning of Public Comments. When addressing the Board, it is requested that you state your name for the record. Address the Board as a whole through the Chair. Comments to individual Members or staff are not permitted. Speakers are limited to three (3) minutes.

Materials/handouts can be requested up to 72 hours in advance of the meeting by visiting <https://workforce.ocgov.com/oc-workforce-development-board>.

This WIOA Title I financially assisted program or activity is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. TDD/TTY users, please call the California Relay Service (800) 735-2922 or 711. If you need special assistance to participate in this program, please contact info@ocworkforcesolutions.com at least 72 hours prior to the event to allow reasonable arrangements to be made to ensure program accessibility.

AGENDA:

1. CALL TO ORDER: Chair, Anna Lisa Lukes
2. PLEDGE OF ALLEGIANCE
3. BOARD MEMBER ROLL CALL: OC Community Services Representative
4. PUBLIC COMMENT:
At this time, members of the public may address the Business Services Committee regarding any items within the subject jurisdiction, provided that no action is taken on off-agenda items unless authorized by law. *(Comments shall be limited to three (3) minutes, unless the Chair pre-identifies a different time at the start of meeting for all public speakers).*

PRESENTATION(S):

5. BROWN ACT REFRESHER
John Cleveland, Senior Deputy County Counsel Office of the County Counsel
6. COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs) OVERVIEW,
Dr. Wallace Walrod, Chief Economic Advisor, Founder & Managing Partner TCCG

ACTION ITEM(S):

7. 2024-2029 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)
Recommendation: Review and support staff's recommendation to submit the 2024-2029 CEDs to the Orange County Board of Supervisors and final submission to the Economic Development Administration (EDA), including any non-substantive changes and updates.
8. POLICY UPDATES
 - A. OCWDB CalJOBS Participant Reporting Timeline Policy
 - B. OCWDB Financial Literacy Policy
 - C. OCWDB CalJOBS Data Change Request Policy*Recommendation: Review and support staff's recommendations to update OCWDB Policies A, B, and C as outlined above, including any non-substantive changes and updates, including references in related policies.*

INFORMATIONAL ITEM(S):

9. CHAIR REPORT: Chair, Anna Lisa Lukes
10. DIRECTOR'S REPORT: Nancy Cook, Director, OC Workforce and Economic Development Division
 - A. PROGRAM UPDATES
 - B. PROGRAM PERFORAMANCE (Q3)
 - C. UPCOMING EVENTS

DISCUSSION ITEM(S):

11. OPEN DISCUSSION

At this time, members of this Subcommittee may comment on agenda or non-agenda matters provided that NO action may be taken on off-agenda items unless authorized by law.

ADJOURNMENT

NEXT MEETING: June 26, 2024

DISCLAIMER: No member of the Orange County Workforce Development Board (OCWDB) shall sign a letter or make a statement purported to represent the position of OCWDB as a body. Letters or verbal statements of support or opposition on any issue shall only be made or signed by the Chair of OCWDB and shall be submitted to the Advisory Board for pre-approval. The policy of the Board of Supervisors does not allow OCWDB or its Chair to sign a letter of position on any matters pertaining to legislation. OCWDB members may write personal letters or speak as individuals stating personal positions but may not do so as representing the position or opinion of OCWDB and/or the County of Orange.

Item #7 – ACTION

Comprehensive Economic Development Strategy (CEDS) 2024-2029
Recommendation Summary
May 29, 2024

BACKGROUND:

The County of Orange oversees the regional CEDS Committee, operating under the Public Works and Economic Development Act of 1965. Every five years, this committee, led by Orange County Community Services, Workforce and Economic Development Division in partnership with the Orange County Workforce Development Board, develops a Comprehensive Economic Development Strategy (CEDS). The CEDS provides crucial insights into Orange County's economic landscape and outlines plans for growth. The updated CEDS assesses the current state of the economy, identifies vulnerable areas, and proposes action strategies across key sectors such as infrastructure, workforce, education, housing, innovation, and healthcare. It serves as a valuable resource for economic, workforce, and demographic information, including research on high-unemployment and low-income communities.

The following goals are included in the CEDS 2024-2029:

Goal 1: Provide World-Class Education, Career, and Workforce Opportunities to Address the Skills Gap

Goal 2: Focus on Residents Living in Disinvested Communities

Goal 3: Promote Key Industry Clusters

Goal 4: Improve Orange County's Economic Competitiveness in a Global Economy

Goal 5: Plan and Develop State-of-the-Art Infrastructure

RECOMMENDATION(S):

Review and Support staff's recommendation to submit the 2024-2029 CEDS to the Orange County Board of Supervisors and final submission to the Economic Development Administration (EDA), with authority to make any non-substantive changes and updates.

ATTACHMENT(S):

Comprehensive Economic Development Strategy (CEDS) 2024-2029

Item #8 – ACTION

Policy Updates
 Recommendation Summary
 May 29, 2024

BACKGROUND:**A. OCWDB CalJOBS Participant Reporting Timeline Policy**

The Employment Development Department (EDD) submits accurate participant reports and validated individual data to the Department of Labor (DOL) quarterly and annually. CalJOBS, California's 'system of record,' streamlines intake and case management for WIOA Title I programs, emphasizing timely data entry to facilitate program monitoring.

- Policy revisions incorporate updated guidance based on the latest EDD directives. The EDD State Directive emphasizes the requirement to enter all data into CalJOBS in a timely manner to ensure a common record is maintained at all times, and when appropriate, a common exit is applied.

B. OCWDB Financial Literacy Policy & Update to ITA Policy

Financial literacy education refers to activities that provide individuals with the knowledge and skills that they need to achieve long-term financial stability.

- Policy revisions outline the revised sequence and access to financial literacy education, which is essential for participants to receive the necessary support for success in their assigned training activities.

C. OCWDB CalJOBS Data Change Request Policy

Service Providers for WIOA Title I programs must report participant information via CalJOBS. Managers, staff, and MIS Administrators can change active participant data, but after 30 days, certain areas of the record are locked. The DCR form allows corrections for data entry errors and uncontrollable circumstances.

- Policy revisions incorporate updated guidance based on EDD directives. The EDD State Directives provide updated instructions for submitting a Data Change Request (DCR) form.

RECOMMENDATION(S):

Review and support staff's recommendations to update OCWDB policies, including any non-substantive changes and updates, including references in related policies.

ATTACHMENT(S):

1. OCWDB CalJOBS Participant Reporting Timeline Policy & Attachments – Redline & Clean
2. OCWDB Financial Literacy Policy – Redline & Clean
3. OCWDB CalJOBS Data Change Request Policy – Redline & Clean

CalJOBS Participant Reporting Timeline Policy

Redline and Clean Version

Information Notice No. 24-OCWDB-06

Supersedes Information Notice No. 17-OCDB-02, 14-OCWDA-05



DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES

MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING & COMMUNITY
DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

PAM PASSOW
DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

OC Community Resources

Date:
~~November 6, 2017~~ May 29, 2024

Formatted: Font: Bold, Do not check spelling or grammar

Formatted: Font: Bold, Do not check spelling or grammar

To: All WIOA Subrecipients of the Orange County
Workforce Development Board

From: ~~Brian Rayburn~~ Nancy Cook
~~Interim~~ Director of Workforce and Economic Development

Subject: CalJOBS Participant Reporting Timeline
Information Notice ~~No. 17-OCDB-02~~ No. 24-OCWDB-06
Supersedes Information Notice No. 17-OCDB-02,
14-OCWDA-05

Formatted: Indent: First line: 0.8"

PURPOSE

This policy provides guidance regarding participant reporting requirements and timeline in the CalJOBS system.

~~This policy supersedes Information Notice No. 14-OCWDA-05 dated November 6, 2014.~~

EFFECTIVE DATE

This policy is effective on the date of ~~immediately upon~~ issuance.

REFERENCES

- ~~EDD Directive WSD13-11~~ Workforce Services Directive WSD 20-10: CalJOBS Participant Reporting (April 9, 2014)
- WSD 18-02: Data Change Request Form Procedure
- WSD 16-23: Mandated Use of One Integrated Data System – Direct Data Key Entry into CalJOBS

Formatted: Font: (Default) Arial, Font color: Text 1

BACKGROUND

The Employment Development Department (EDD) is required by federal regulations to submit accurate participant reports and validated individual participant data to the Department of Labor (DOL) on a quarterly and annual basis.

~~On May 5, 2014, CalJOBS, part of the California Workforce Services Network (CWSN), replaced the Job Training Automation (JTA) system. CalJOBS is the State of California's federally recognized, "system of record" for the participant tracking and reporting of WIOA Title I programs. Trade Adjustment Assistance Program (TAA), WIOA and Wagner Peyser Act (WPA) programs. As the system of record, CalJOBS provides a unified and streamlined intake and case management system that enables co-enrollment across programs, while reducing the duplication of services provided to program participants.~~

Formatted: Spanish (Spain)



1300 SOUTH GRAND
BLDG. B, SECOND FLOOR
SANTA ANA, CA 92705
PHONE: 714.480.6500
FAX: 714.567-7132

The EDD State Directive WSD 16-23 emphasizes the requirement to enter all data into CalJOBS in a timely manner to ensure a common record is maintained at all times, and when appropriate, a common exit is applied.

If the data is not required for federal reports or needed to determine eligibility, the data may be entered in CalJOBS upon the County's discretion. However, the information must still be available for monitoring. This includes, but is not limited to case notes, Objective Assessments, and Individual Employment Plans. All participants served by these funding streams must be entered into CalJOBS in a timely manner to ensure a common record, and where appropriate, a common exit is maintained at all times.

The EDD State Directive WSD13 11 emphasizes the need to enter participant data into the CalJOBS system within acceptable timeframes, and in the correct manner.

POLICY AND PROCEDURES:

1. All OCWDB Subrecipients Service Providers for WIOA ~~formula~~ programs and special projects are required to report individual participant data via the CalJOBS system, the State's system of record.

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

Formatted: Normal, Right: -0.1", No bullets or numbering

Formatted: Right: -0.1"

2. All OCWDB Subrecipients Service Providers shall:

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

Formatted: Normal, Right: -0.1", No bullets or numbering

Formatted: Right: -0.1", Bulleted + Level: 1 + Aligned at: 0.25" + Indent at: 0.5"

Formatted: Right: -0.1"

- ~~e~~Ensure strict adherence to all State and OCWDB requirements related to CalJOBS;
- ~~e~~Establish quality control procedures to protect the integrity of data pertaining to participants, services and outcomes;
- ~~e~~Establish a review process for CalJOBS reports that include participant rosters and other reports provided by the OCWDB; ~~and~~
- ~~e~~Ensure strict adherence to proper handling of personally identifiable information (PII) and other confidential participant information;

3. In addition:

Formatted: Font: (Default) Arial

Formatted: Normal, Right: -0.1", No bullets or numbering

Formatted: Right: -0.1"

- Install and follow efficient internal data entry and data management processes that require timely input of participant data in CalJOBS;
- Enter participant data in CalJOBS **within 5 business days** from the start or end date of any activity (i.e. application, participation/enrollment, service provision, credentials, measurable skills gains, closure, follow up, WIOA performance outcome, etc.); ~~The 5-business-day timeline shall also apply to all updates in start or end dates;~~
- Ensure that staff designated to handle data entry and data management are given prior training on CalJOBS functionalities and limitations; and,
- Establish internal monitoring procedures ~~install a system~~ to establish staff accountability for data entered.

4. Failure to enter or submit data in a timely manner can result in, but is not limited to in the following:

Formatted: Font: (Default) Arial

Formatted: Normal, Right: -0.1", No bullets or numbering

- Failure to meet the six primary indicators of performance;
- Loss of common performance outcomes as any dDelay in data submission may result in missing timely match with base wage records;
- Inaccurate data in CalJOBS that is reported;
- Increase in errors leading to submission of Data Change Requests (DCR);
- Monitoring and/or audit findings;

• Required entry of additional case notes;

- ~~Errors such as Individuals incorrectly soft/auto exited due to failure to update lack of data entry such as activities or /services, client already entered by another program or grant recipient, etc.;~~
- ~~Data Change Requests DCRs~~ to EDD by the OCWDB ~~will may~~ be denied ~~if reason is due to simple failure to submit data;~~ and
- Loss of CalJOBS data quality and integrity.

Formatted: Right: -0.1"

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

5. ~~The accuracy and reliability of program reports submitted by Service Providers~~ subrecipients are fundamental elements of good public administration, and are necessary ~~tools for maintaining and demonstrating~~ to maintain and demonstrate system integrity. ~~In order to~~ To ensure the accuracy and reliability of reported information, ~~subrecipients~~ Service Providers ~~shall be required to~~ validate the data submitted in CalJOBS. Failure to demonstrate the validity of ~~reported~~ all data will be deemed ~~to be as~~ a failure to report, and subject to corrective action or sanction, ~~as appropriate.~~

Formatted: Font: (Default) Arial

Formatted: Normal, Right: -0.1", No bullets or numbering

Formatted: Right: -0.1"

Formatted: Font: (Default) Arial

Formatted: Normal, Right: -0.1", No bullets or numbering

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

6. To ensure that ~~subrecipients~~ Service Providers are able to successfully implement data validation, the OCWDB will monitor on a regular schedule.

Formatted: Right: -0.1"

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

Formatted: Normal, Right: -0.1", No bullets or numbering

Formatted: Right: -0.1"

All participant data, including individual applications for service, cannot be entered, or submitted more than 30-days in arrears. ~~Any late submission of participant data (more than 30-days in arrears) is~~ Late submissions are considered noncompliant. ~~Also, failure to meet the 30-day requirement may result in cash holds or de-obligation of funds.~~

ACTION

Bring this ~~Information Notice along with the attachment policy~~ to the attention of all staff ~~and~~ relevant parties.

Formatted: Right: -0.1"

INQUIRIES

If you have any questions regarding this policy, please email info@ocworkforcesolutions.com. ~~contact appropriate contract administration staff at your Contract Administrator at 714-480-6500.~~



DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES

MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING & COMMUNITY
DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

PAM PASSOW
DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

OC Community Resources

Date: May 29, 2024

To: All WIOA Subrecipients of the Orange County
Workforce Development Board

From: Nancy Cook
Director of Workforce and Economic Development

Subject: CalJOBS Participant Reporting Timeline
Information Notice No. 24-OCWDB-06
Supersedes Information Notice No. 17-OCDB-02,
14-OCWDA-05

PURPOSE

This policy provides guidance regarding participant reporting requirements and timeline in the CalJOBS system.

EFFECTIVE DATE

This policy is effective on the date of issuance.

REFERENCES

- Workforce Services Directive WSD 20-10: CalJOBS Participant Reporting
- WSD 18-02: Data Change Request Form Procedure
- WSD 16-23: Mandated Use of One Integrated Data System – Direct Data Key Entry into CalJOBS

BACKGROUND

The Employment Development Department (EDD) is required by federal regulations to submit accurate participant reports and validated individual participant data to the Department of Labor (DOL) on a quarterly and annual basis.

CalJOBS is the State of California's federally recognized, "system of record" for the participant tracking and reporting of WIOA Title I programs. CalJOBS provides a unified and streamlined intake and case management system that enables co-enrollment across programs, while reducing the duplication of services provided to program participants. The EDD State Directive WSD 16-23 emphasizes the requirement to enter all data into CalJOBS in a timely manner to ensure a common record is maintained at all times, and when appropriate, a common exit is applied.

If the data is not required for federal reports or needed to determine eligibility, the data may be entered in CalJOBS upon the County's discretion. However, the information must still be available for monitoring. This includes, but is not limited to case notes, Objective Assessments, and Individual Employment Plans.



1300 SOUTH GRAND
BLDG. B, SECOND FLOOR
SANTA ANA, CA 92705
PHONE: 714.480.6500
FAX: 714.567-7132

POLICY AND PROCEDURES:

All OCWDB Service Providers for WIOA programs and special projects are required to report individual participant data via the CalJOBS system, the State's system of record.

Service Providers shall:

- Ensure strict adherence to all State and OCWDB requirements related to CalJOBS;
- Establish quality control procedures to protect the integrity of data pertaining to participants, services and outcomes;
- Establish a review process for CalJOBS reports that include participant rosters and other reports provided by the OCWDB;
- Ensure strict adherence to proper handling of personally identifiable information (PII) and other confidential participant information;
- Install and follow efficient internal data entry and data management processes that require timely input of participant data in CalJOBS;
- Enter participant data in CalJOBS **within 5 business days** from the start or end date of any activity (i.e. application, participation/enrollment, service provision, credentials, measurable skills gains, closure, follow up, WIOA performance outcome, etc.);
- Ensure that staff designated to handle data entry and data management are given prior training on CalJOBS functionalities and limitations; and,
- Establish internal monitoring procedures to establish staff accountability for data entered.

Failure to enter or submit data in a timely manner can result in, but is not limited to the following:

- Failure to meet the six primary indicators of performance;
- Delay in data submission may result in missing timely match with base wage records;
- Inaccurate data in CalJOBS that is reported;
- Increase in errors leading to submission of Data Change Requests (DCR);
- Monitoring and/or audit findings;
- Required entry of additional case notes;
- Individuals incorrectly soft/auto exited due to lack of data entry;
- DCRs to EDD by the OCWDB may be denied; and
- Loss of CalJOBS data quality and integrity.

The accuracy and reliability of program reports submitted by Service Providers are fundamental elements of good public administration and are necessary to maintain and demonstrate system integrity. To ensure the accuracy and reliability of reported information, Service Providers shall validate the data submitted in CalJOBS. Failure to demonstrate the validity of all data will be deemed a failure to report, and subject to corrective action or sanction.

To ensure that Service Providers are able to successfully implement data validation, the OCWDB will monitor on a regular schedule.

All participant data, including individual applications for service, cannot be entered, or submitted more than 30-days in arrears. Late submissions are considered noncompliant.

ACTION

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

INQUIRIES

If you have any questions regarding this policy, please email info@ocworkforcesolutions.com.

Financial Literacy Policy

Redline and Clean Version

Information Notice No. 24-OCWDB-05

Supersedes Information Notice No. 18-OCWDB-09



DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES

MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING & COMMUNITY
DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

PAM PASSOW
DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES



1300 SOUTH GRAND
BLDG. B, SECOND FLOOR
SANTA ANA, CA 92705
PHONE: 714.480.6500
FAX: 714.567-7132

OC Community Resources

Date:
~~April 25, 2019~~ May 29, 2024

Formatted: Font: Bold

Formatted: Font: Bold

To: All WIOA Subrecipients of the Orange County
Workforce Development Area Board

From: ~~Garma Lacy~~ Nancy Cook
Director of Workforce and Economic Development

Subject: Financial Literacy Policy
Information Notice ~~No. 18-OCWDB-09~~ No. 24-OCWDB-05
Supersedes Information Notice No. 18-OCWDB-09

PURPOSE

This policy provides guidance to subrecipients as they implement the career service and youth service element of financial literacy in the One- Stop and Youth system.

EFFECTIVE DATE

This policy is effective on the date of issuance.

REFERENCES

- ~~WIOA §129(b)(2)(D)~~ 20 CFR §681.500 20 CFR Part 681.500

BACKGROUND

Financial literacy education refers to activities that provide individuals with the knowledge and skills that they need to achieve long-term financial stability. ~~The Orange County Development Board joined the Federal Deposit Insurance Corporation (FDIC) Money Smart Alliance to strengthen financial education efforts.~~

- The financial literacy education program elements may includes activities which:

Formatted: Font: (Default) Arial

Formatted: Font: (Default) Arial

Formatted: Normal, No bullets or numbering

- Support the ability of participants to create budgets, initiate checking and savings accounts at banks, and make informed financial decisions;
- Support participants in learning how to effectively manage spending, credit, and debt, including student loans, consumer credit, and credit cards;
- Teach participants about the significance of credit reports and credit scores; what their rights are regarding their credit and financial information; how to determine the accuracy of a credit report and how to correct inaccuracies; and how to improve or maintain good credit;
- Support a participant's ability to understand, evaluate, and compare financial products, services, and opportunities and to make informed financial decisions;

Formatted: Spanish (Spain)

- Educate participants about identity theft, ways to protect themselves from identify theft, and how to resolve cases of identity theft and in other ways understand their rights and protections related to personal identity and financial data;

Formatted: Font color: Text 1

- ~~Educate participants about identity theft, ways to protect themselves from identify theft, and how to resolve cases of identity theft and in other ways understand their rights and protections related to personal identity and financial data;~~

- Support activities that address the particular financial literacy needs of non-English speakers, including providing the support through the development and distribution of multilingual financial literacy and education materials;
- Support activities that address the particular financial literacy needs of people with disabilities, including connecting them to benefits planning and work incentives counseling;
- Provide financial education that is age appropriate, timely, and provides opportunities to put lessons into practice, such as by access to safe and affordable financial products that enable money management and savings; and
- Implement other approaches to help participants gain the knowledge, skills, and confidence to make informed financial decisions that enable them to attain greater financial health and stability by using high quality, age appropriate, and relevant strategies and channels, including, where possible, timely and customized information, guidance, tools, and instruction.

POLICY AND PROCEDURES:

Financial literacy education must be made available to, but not required of, participants. The financial literacy education activities will serve as essential learning opportunities, equipping participants with practical knowledge and skills related to financial management.

Formatted: Right: -0.05"

For all participants, the Service Providers shall open the appropriate activity code in CalJOBS, and case note the date that financial literacy education was provided.

Formatted: Right: -0.05"

Formatted: Left, Right: -0.05"

Activity code entered in CalJOBS must be as follows;

Formatted: Right: -0.05"

Formatted: Font: Not Bold, Font color: Auto

- Adult and Dislocated Worker: Activity Code 221 (Financial Literacy Education)
- Youth: Activity Code 407 (Financial Literacy Education)

Formatted: Right: -0.05", Bulleted + Level: 1 + Aligned at: 0.25" + Indent at: 0.5"

Formatted: Font: Not Bold

Upon completion, Financial Literacy certificates shall be filed in the participant's file and uploaded in CalJOBS.

Formatted: Right: -0.05"

Formatted: Font: (Default) Arial, Font color: Text 1

Formatted: Right: -0.05"

Formatted: Font: (Default) Arial, Font color: Text 1

~~Subrecipients shall utilize the Federal Deposit Insurance Corporation (FDIC) Money Smart financial education program for financial literacy services. The FDIC's Money Smart financial education program can help people of all ages enhance their financial skills and create positive banking relationships. In particular, FDIC's Money Smart curricula meets the WIOA financial literacy element.~~

Adult and Dislocated Worker Programs

- ~~The FDIC Money Smart instructor-led education program shall offered within the One-Stop system. This instructor-led class should be offered, at a minimum, on a monthly basis and made available to all participants of One-Stop system partner programs and employers. The instructor-led education program does not need to be physically held at the One-Stop Center/America's Job Center of California.~~

2. ~~The following FDIC Money Smart classes shall be offered:~~

- a. ~~Money Smart for Adults — provides participants with practical knowledge, skills-building opportunities, and resources they can use to manage their finances with confidence.~~
- b. ~~Money Smart for Older Adults — raises awareness among older adults and their caregivers on how to prevent elder financial exploitation and encourages advance planning and informed financial decision-making. Money Smart for Older Adults was developed jointly by the Federal Deposit Insurance Corporation (FDIC) and the Bureau of Consumer Financial Protection.~~
- c. ~~Money Smart for Small Business (MSSB) — provides an introduction to topics related to starting and managing a business. MSSB was developed jointly by the Federal Deposit Insurance Corporation (FDIC) and the U.S. Small Business Administration (SBA).~~

3. ~~Staff leading the instructor-led Money Smart classes shall review and utilize the appropriate FDIC training materials.~~

4. ~~Instructor-led Money Smart classes shall also be offered in Spanish and Vietnamese, at minimum, quarterly.~~

5. ~~All instructor-led programs (including those in Spanish and Vietnamese) must be taught by an individual who has one year of specialized experience in group facilitation and outreach or related experience.~~

6. ~~All One-Stop customers shall also have access to Computer-Based Instruction (CBI) for the FDIC Money Smart and the Money Smart Podcast Network.~~

- a. ~~The) features a game-based learning design and separate learning tracks for adults and young adults age 13 and older. You can earn a certificate of completion for successfully completing each module.~~
- b. ~~The is the portable audio (MP3) version of Money Smart. With verbal descriptions and topic-based scenarios, the MP3 version uses dialogue to deliver basic financial information. The four categories are:~~
 - i. ~~Basics of Banking~~
 - ii. ~~Checking Accounts~~
 - iii. ~~Savings/Spending Plan~~
 - iv. ~~Borrowing Money~~

7. ~~Any participants who are requesting supportive services or training shall have started and have agreed to complete either the FDIC Money Smart workshop or CBI prior to receiving supportive services or training. If a participant has started FDIC Money Smart and receives a supportive service prior to completion, a second supportive service cannot be issued until the participant completes the whole curriculum.~~

8. ~~Official certificates of completion from the FDIC shall be filed in the participant's file.~~

9. ~~Enrolled participants who receive financial literacy training shall have the appropriate code entered in CalJOBS (Activity Code 221: Financial Literacy Education).~~

Youth/Young Adult Programs

1. ~~All enrolled youth/young adult participants must receive the FDIC Money Smart training.~~

- ~~2. The FDIC Money Smart for Young Adults instructor-led education program may be offered. The instructor-led class does not need to be physically held at the Provider location.~~
- ~~3. Staff leading the instructor-led Money Smart classes shall review and utilize the appropriate FDIC training materials.~~
- ~~4. All instructor-led programs must be taught by an individual who has one year of specialized experience in group facilitation and outreach or related experience.~~
- ~~5. All customers shall also have access to Computer-Based Instruction (CBI) for the FDIC Money Smart and the Money Smart Podcast Network.~~
 - ~~a. The features a game-based learning design and separate learning tracks for adults and young adults age 13 and older. You can earn a certificate of completion for successfully completing each module.~~
 - ~~b. The is the portable audio (MP3) version of Money Smart. With verbal descriptions and topic-based scenarios, the MP3 version uses dialogue to deliver basic financial information. The four categories are:~~
 - ~~i. Basics of Banking~~
 - ~~ii. Checking Accounts~~
 - ~~iii. Savings/Spending Plan~~
 - ~~iv. Borrowing Money~~
- ~~6. Any participants who are requesting supportive services or training shall have started and have agreed to complete either the FDIC Money Smart workshop or CBI prior to receiving supportive services or training. If a participant has started FDIC Money Smart and receives a supportive service prior to completion, a second supportive service cannot be issued until the participant completes the whole curriculum.~~
- ~~7. Official certificates of completion from FDIC shall be filed in the participant's file.~~
- ~~8. Subrecipients may utilize stipends and/or incentives for participants to encourage completion.~~
- ~~9. Enrolled participants who receive financial literacy training shall have the appropriate code entered in CalJOBS (Activity Code 407: Financial Literacy Education).~~

Formatted: Right: -0.05"

ACTION

Bring this ~~Information Notice along with the attachment~~policy to the attention of all staff and relevant parties.

Formatted: Right: 0.03"

INQUIRIES

If you have any questions regarding this policy, please email info@ocworkforcesolutions.com. ~~contact appropriate contract administration staff at your Contract Administrator at 714-480-6500.~~

Formatted: Justified, Right: 0.14"



DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES

MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING & COMMUNITY
DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

PAM PASSOW
DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

OC Community Resources

Date: May 29, 2024

To: All WIOA Subrecipients of the Orange County
Workforce Development Board

From: Nancy Cook
Director of Workforce and Economic Development

Subject: Financial Literacy Policy
Information Notice No. 24-OCWDB-05
Supersedes Information Notice No. 18-OCWDB-09

PURPOSE

This policy provides guidance to subrecipients as they implement the career service and youth service element of financial literacy in the One- Stop and Youth system.

EFFECTIVE DATE

This policy is effective on the date of issuance.

REFERENCES

- 20 CFR Part 681.500

BACKGROUND

Financial literacy education refers to activities that provide individuals with the knowledge and skills that they need to achieve long-term financial stability.

The financial literacy education program elements may include activities which:

- Support the ability of participants to create budgets, initiate checking and savings accounts at banks, and make informed financial decisions;
- Support participants in learning how to effectively manage spending, credit, and debt, including student loans, consumer credit, and credit cards;
- Teach participants about the significance of credit reports and credit scores; what their rights are regarding their credit and financial information; how to determine the accuracy of a credit report and how to correct inaccuracies; and how to improve or maintain good credit;
- Support a participant's ability to understand, evaluate, and compare financial products, services, and opportunities and to make informed financial decisions;
- Educate participants about identity theft, ways to protect themselves from identify theft, and how to resolve cases of identity theft and in other ways understand their rights and protections related to personal identity and financial data;



1300 SOUTH GRAND
BLDG. B, SECOND FLOOR
SANTA ANA, CA 92705
PHONE: 714.480.6500
FAX: 714.567-7132

- Support activities that address the particular financial literacy needs of non-English speakers, including providing the support through the development and distribution of multilingual financial literacy and education materials;
- Support activities that address the particular financial literacy needs of people with disabilities, including connecting them to benefits planning and work incentives counseling;
- Provide financial education that is age appropriate, timely, and provides opportunities to put lessons into practice, such as by access to safe and affordable financial products that enable money management and savings; and
- Implement other approaches to help participants gain the knowledge, skills, and confidence to make informed financial decisions that enable them to attain greater financial health and stability by using high quality, age appropriate, and relevant strategies and channels, including, where possible, timely and customized information, guidance, tools, and instruction.

POLICY AND PROCEDURES:

Financial literacy education must be made available to, but not required of, participants. The financial literacy education activities will serve as essential learning opportunities, equipping participants with practical knowledge and skills related to financial management.

For all participants, the Service Providers shall open the appropriate activity code in CalJOBS, and case note the date that financial literacy education was provided.

Activity code entered in CalJOBS must be as follows:

- Adult and Dislocated Worker: Activity Code 221 (Financial Literacy Education)
- Youth: Activity Code 407 (Financial Literacy Education)

Upon completion, Financial Literacy certificates shall be filed in the participant's file and uploaded in CalJOBS.

ACTION

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

INQUIRIES

If you have any questions regarding this policy, please email info@ocworkforcesolutions.com.

CalJOBS Data Change Request Policy

Redline and Clean Version

Information Notice No. 24-OCWDB-07

Supersedes Information Notice No. 18-OCWDB-01



DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES

MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING & COMMUNITY
DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

PAM PASSOW
DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

OC Community Resources

Date: ~~August 14, 2018~~ May 29, 2024

To: WIOA Subrecipients of the Orange County
Workforce Development Area Board

From: ~~Brian Ray~~ Nancy Cook
~~Interim Director~~ of Workforce and Economic Development

Subject: CalJOBS Data Change Request ~~Form Policy~~
Information Notice ~~No. 18-OCWDB-01~~ No. 24-OCWDB-07
Supersedes Information Notice No. 18-OCWDB-01

PURPOSE

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

EFFECTIVE DATE

This policy is effective on the date of the issuance.

REFERENCES

- WIOA (Public Law 113-128)
- ~~State~~ Workforce Services Directive WSD_18-02; Data Change Request Form Procedure
- WSD 20-10: CalJOBS Participant Reporting
- Department of Labor (DOL) Training and Employment Guidance Letter (TEGL) 10-16; Change 42 Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Core Programs Title I, Title II, Title III, and Title IV Core Programs (August 23, 2017)

EFFECTIVE DATE

~~This policy is effective immediately upon issuance.~~

BACKGROUND

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

Formatted: Font: 12 pt

Formatted: Spanish (Spain)



1300 SOUTH GRAND
BLDG. B, SECOND FLOOR
SANTA ANA, CA 92705
PHONE: 714.480.6500
FAX: 714.567-7132

POLICY AND PROCEDURES:

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

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

~~When inputting activities in CalJOBS, Service Providers must ensure a Start and Projected end date is imputed/applied to avoid a system closure. Subrecipients must ensure records are updated within 30 calendar days of the activity's Projected Begin/End Date/Scheduled Date to avoid a "System Closed" completion status. Once the activity becomes "System Closed," the data cannot be changed or updated. Activities with a "System Closed" completion status are included in performance calculations; the data reported to DOL and therefore, the data cannot be changed or updated without approval.~~

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

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

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

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

~~Technical Assistance may be provided to subrecipients with excessive DCRs.~~

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

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

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

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

The DCR Supplemental Spreadsheet should be submitted in its original [Excel](#) format (not in a [PDF](#) or any other format), ~~and~~ [and](#) must always be accompanied by the signed DCR.

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

For ~~subrecipients~~ [Service Providers](#), the signatures of the requestor and ~~Executive Director~~ [Program Manager](#) or designee are required. This enables the ~~Executive Directors~~ [Program Managers](#) to be aware of the nature and number of data changes that are requested. Any request lacking the required authorized signatures will be denied.

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

ACTION

Bring this ~~policy~~ [Information Notice along with the attachment](#) to the attention of all staff ~~and relevant parties.~~

INQUIRIES

If you have any questions [regarding this policy](#), please [email info@ocworkforcesolutions.com](#). ~~contact appropriate contract administration staff at 714-480-6500.~~

ATTACHMENTS

Attachment I – [DCR Form](#) Instructions

Attachment II – DCR Form

Attachment III – DCR Supplemental Spreadsheet

Formatted: Not Expanded by / Condensed by

Formatted: Justified

Orange County Workforce Development Board
CalJOBS Data Change Request Form Instructions

Formatted: Footer distance from edge: 0.56"

REQUESTOR IDENTIFYING INFORMATION

1. **Date of Request** – Indicate the submission date of the request.
2. **Name of Agency** – Indicate the requesting agency name.
3. **Requestor** – Indicate the name of the staff requesting the data change.
4. **Requestor Phone** – Indicate the phone number of the staff listed in item #3.
5. **Requestor E-mail** – Indicate the e-mail address of the staff listed in item #3.
- ~~6. **Client's Last Name** – Indicate the client's last name.~~
6. **WIOA App ID** – Indicate the ~~client~~participant's WIOA Application number. The request and/or corresponding documentation should ~~not~~**never** include participants' Social Security Numbers.

Formatted: Font: Bold

DETAILED REASON FOR REQUESTED CORRECTION

- ~~7. _____~~
- ~~8. **Has the client already soft exited from the system? Yes or No** – Indicate whether or not the client as already soft exited from CalJOBS.~~
- ~~9. **If yes, date of soft exit** – Indicate the soft exit date of the client, if applicable.~~
- ~~10-7. **Description of corrective action requested** - Indicate the specific elements that require correction. Be sure to include the following: program name, WIOA application number, participant's name, and a detailed explanation of what needs to be corrected. If the participant has already soft exited, make sure to include the soft exit date. Client's Last Name, WIOA App ID and Program/Grant. Please be as detailed as possible. If the request does not fit, please use Attachment III.~~
- ~~11-8. **Justification and potential impact to agency if the correction is not made** – Provide a justification as to why the change is necessary. In addition, any documentation that will support the justification for the data change can be included as a separate attachment.~~
9. **Corrective action taken to avoid similar corrections** – Indicate the corrective action taken internally to ensure similar corrections are submitted to the OCWDB. Include the policy and procedure that staff will follow to avoid similar errors from reoccurring.

Formatted: No bullets or numbering

AUTHORIZED SIGNATURES

- ~~12. _____~~
10. **Authorized Signatures** – Any request lacking the authorized signature(s) will not be approved.

Formatted: Left, No bullets or numbering

SUPPLEMENTAL SPREADSHEET

Formatted: Right

Revised 5/2024

~~13. **Supplemental Corrections** – For multiple requests, please use Attachment III.~~

~~11. The spreadsheet must include, at minimum, the application number, program name, state ID, participant's name, grant code and school status (if applicable).~~

~~12. **Comments/Instructions** – Provide an explanation of what needs to be corrected.~~

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

~~Requests should be submitted to the OCDB electronically, via the following email address: with the subject line "Data Change Request".~~

Formatted: Font: Bold

Formatted: List Paragraph, Numbered + Level: 1 +
Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment:
Left + Aligned at: 0" + Indent at: 0.25"

Formatted: Font: 2 pt

Formatted: Centered

Formatted: Right

Revised 5/2024



Orange County Workforce Development Board



CalJOBS Data Change Request Form

REQUESTOR IDENTIFYING INFORMATION

DATE OF REQUEST: [Click here to enter text.](#)

NAME OF AGENCY: [Click here to enter text.](#)

REQUESTOR: [Click here to enter text.](#)

REQUESTOR PHONE: [Click here to enter text.](#)

REQUESTOR E-MAIL: [Click here to enter text.](#)

DETAILED REASON FOR REQUESTED CORRECTION

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

CORRECTIVE ACTION TAKEN TO AVOID SIMILAR CORRECTIONS:

[Click here to enter text.](#)

AUTHORIZED SIGNATURES

SIGNATURE OF REQUESTOR _____

SIGNATURE OF ~~DIRECTOR~~ PROGRAM MANAGER
(OR PROGRAM DESIGNEE) _____

IF ADDITIONAL SPACE IS NEEDED, PLEASE SUBMIT ANOTHER ATTACHMENT.

OCWDB USE ONLY

STAFF ASSIGNED _____ DATE _____

☐ Approve ☐ Deny

DCR # _____

Requests should be submitted to the OCWDB staff electronically, ~~via the following email address: cidmis@occr.ocgov.com~~ via email to the Contract Manager with the subject line:

Revised 5/2024

~~"Request to Change Previously Submitted CalJOBS Data"~~ "Data Change Request"

Formatted: Centered, Right: 0.04"

Revised 5/2024

[illegible]

Added "State ID" Column

Added "School Status" Column



DYLAN WRIGHT
DIRECTOR
OC COMMUNITY RESOURCES

CYMANTHA ATKINSON
ASSISTANT DIRECTOR
OC COMMUNITY RESOURCES

JOANNE VEEDOR
DIRECTOR
ADMINISTRATIVE SERVICES

MONICA SCHMIDT
DIRECTOR
OC ANIMAL CARE

JULIA BIDWELL
DIRECTOR
OC HOUSING & COMMUNITY
DEVELOPMENT

RENEE RAMIREZ
DIRECTOR
OC COMMUNITY SERVICES

PAM PASSOW
DIRECTOR
OC PARKS

JULIE QUILLMAN
COUNTY LIBRARIAN
OC PUBLIC LIBRARIES

OC Community Resources

Date: May 29, 2024

To: WIOA Subrecipients of the Orange County
Workforce Development Board

From: Nancy Cook
Director of Workforce and Economic Development

Subject: CalJOBS Data Change Request Policy
Information Notice No. 24-OCWDB-07
Supersedes Information Notice No. 18-OCWDB-01

PURPOSE

This policy provides guidance and establishes the procedures regarding the CalJOBS Data Change Request (DCR) form.

EFFECTIVE DATE

This policy is effective on the date of the issuance.

REFERENCES

- WIOA (Public Law 113-128)
- Workforce Services Directive WSD 18-02: Data Change Request Form Procedure
- WSD 20-10: CalJOBS Participant Reporting
- Department of Labor (DOL) Training and Employment Guidance Letter (TEGL) 10-16: Change 2 Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Core Programs

BACKGROUND

State Directives provide instructions for submitting a Data Change Request (DCR) form. Service Providers of all WIOA Title I Adult, Dislocated Worker, Youth, and special programs are required to report participant information via the CalJOBS system. Managers, staff, and Management Information System (MIS) Administrators have the ability to change active participant data. After 30 calendar days, the CalJOBS system does not allow certain areas of the participant record to be changed or updated by managers, staff, or MIS Administrators. The DCR form is a tool to enable the participant data to be changed or updated. Its purpose is to correct data entry errors and other circumstances that are beyond the control of staff.

POLICY AND PROCEDURES:

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



1300 SOUTH GRAND
BLDG. B, SECOND FLOOR
SANTA ANA, CA 92705
PHONE: 714.480.6500
FAX: 714.567-7132

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

When inputting activities in CalJOBS, Service Providers must ensure a Start and Projected end date is applied to avoid a system closure. Records must be updated within 30 calendar days of the activity's Projected Begin/End Date to avoid a "System Closed" completion status. Activities with a completion status are included in the data reported to DOL and therefore, the data cannot be changed or updated without approval.

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

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

If any data needs to be added or changed after 30 days, the DCR form (Attachment II) must be completed and submitted to the Contract Manager. All correspondence should include "**Data Change Request**" in the subject line. Any requests associated to data beyond 90 days will be reviewed on a case-by-case basis and may not be approved.

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

If the DCR is approved, the OCWDB staff will ask the State to make the requested changes and respond to the Service Provider. It is the staff's responsibility to verify that the changes made by the State are accurate. If the DCR is denied, the OCWDB staff will notify the Service Provider.

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

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

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

For Service Providers, the signatures of the requestor and Program Manager or designee are required. This enables the Program Managers to be aware of the nature and number of data changes that are requested. Any request lacking the required authorized signatures will be denied.

Please note that requests that arise out of a result of not adhering to the data entry procedures as outlined in the CalJOBS Participant Reporting Timeline policy, may be denied.

ACTION

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

INQUIRIES

If you have any questions regarding this policy, please email info@ocworkforcesolutions.com.

ATTACHMENTS

Attachment I – DCR Form Instructions

Attachment II – DCR Form

Attachment III – DCR Supplemental Spreadsheet

CalJOBS Data Change Request Policy- Attachments

Attachment I - DCR Form Instructions

Attachment II - DCR Form

Attachment III - DCR Supplemental Spreadsheet

Orange County Workforce Development Board

CalJOBS Data Change Request Form Instructions

REQUESTOR IDENTIFYING INFORMATION

1. **Date of Request** – Indicate the submission date of the request.
2. **Name of Agency** – Indicate the requesting agency name.
3. **Requestor** – Indicate the name of the staff requesting the data change.
4. **Requestor Phone** – Indicate the phone number of the staff listed in item #3.
5. **Requestor E-mail** – Indicate the e-mail address of the staff listed in item #3.
6. **WIOA App ID** – Indicate the participant's WIOA Application number. The request and/or corresponding documentation should **never** include participants' Social Security Numbers.

DETAILED REASON FOR REQUESTED CORRECTION

7. **Description of corrective action requested** - Indicate the specific elements that require correction. Be sure to include the following: program name, WIOA application number, participant's name, and a detailed explanation of what needs to be corrected. If the participant has already soft exited, make sure to include the soft exit date.
8. **Justification and potential impact to agency if the correction is not made** – Provide a justification as to why the change is necessary. In addition, any documentation that will support the justification for the data change can be included as a separate attachment.
9. **Corrective action taken to avoid similar corrections** – Indicate the corrective action taken internally to ensure similar corrections are submitted to the OCWDB. Include the policy and procedure that staff will follow to avoid similar errors from reoccurring.

AUTHORIZED SIGNATURES

10. **Authorized Signatures** – Any request lacking the authorized signature(s) will not be approved.

SUPPLEMENTAL SPREADSHEET

11. **Supplemental Corrections** – For multiple requests, please use Attachment III. The spreadsheet must include, at minimum, the application number, program name, state ID, participant's name, grant code and school status (if applicable).
12. **Comments/Instructions** – Provide an explanation of what needs to be corrected.



Orange County Workforce Development Board



CalJOBS Data Change Request Form

REQUESTOR IDENTIFYING INFORMATION

DATE OF REQUEST: [Click here to enter text.](#)

NAME OF AGENCY: [Click here to enter text.](#)

REQUESTOR: [Click here to enter text.](#)

REQUESTOR PHONE: [Click here to enter text.](#)

REQUESTOR E-MAIL: [Click here to enter text.](#)

DETAILED REASON FOR REQUESTED CORRECTION

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

CORRECTIVE ACTION TAKEN TO AVOID SIMILAR CORRECTIONS:

[Click here to enter text.](#)

AUTHORIZED SIGNATURES

SIGNATURE OF REQUESTOR

SIGNATURE OF PROGRAM MANAGER
(OR PROGRAM DESIGNEE)

IF ADDITIONAL SPACE IS NEEDED, PLEASE SUBMIT ANOTHER ATTACHMENT.

OCWDB USE ONLY

STAFF ASSIGNED

☐ Approve

☐ Deny

DATE

DCR #

Requests should be submitted to the OCWDB staff electronically, via email to the Contract Manager with the subject line:

"Data Change Request"

Revised 5/2024



PERFORMANCE DASHBOARD FOR Q3 JANUARY-MARCH 2024

CENTER STATS



4,479

VISITORS TO CENTERS



3,186 BREA CENTER

1,293 LAGUNA NIGUEL CENTER



2,068

CALL CENTER CALLS



WALK-IN 1st TIME VISITOR
APPOINTMENT RESOURCE ROOM

One-Stop Partner

86%

Participants

92%

Mandatory Partners

100%

Satisfaction Rate

BUSINESS SERVICES



194

EMPLOYERS SERVED



3,304

JOB SEEKERS SERVED

10 HIRING EVENTS

01 CAREER FAIRS

04 INCUMBENT WORKER TRAININGS

04 ON-THE-JOB TRAININGS

06 WORK EXPERIENCE SITES

25

WARN NOTICES

2,773

EMPLOYEES IMPACTED

PROGRAM Q3 ENROLLMENTS

Adult

404

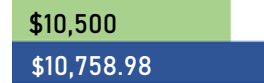


Goal YTD Actual

Median Quarterly Earnings

Dislocated Worker

244



Goal YTD Actual

Median Quarterly Earnings

Veteran

37



Goal YTD Actual

Median Hourly Wages

Youth

489

134 IN-SCHOOL
355 OUT-OF-SCHOOL



Goal YTD Actual

Median Quarterly Earnings

REGIONAL UPDATES



06

COMMUNITY PROJECTS

- REGIONAL CAREER EXPO
- REGIONAL AND LOCAL PLAN DEVELOPMENT
- AI TRAINING

- WORKCON PRESENTATION - DEVELOPING A ROADMAP FOR WORKFORCE AND COMMUNITY COLLEGE PARTNERSHIP

HIGHLIGHTS



TOP 3 TRAININGS

- NETWORK SECURITY
- MEDICAL BILLING
- TRUCK DRIVING



21 YOUTH PARTICIPANTS COMPLETED CERTIFIED NURSING ASSISTANT TRAINING



NOW PROVIDING SERVICES AT VERDUGO RE-ENTRY CENTER

OC Workforce Solutions Center

675 Placentia Avenue, Suite 330
Brea, CA 92821
866-500-6587

www.ocworkforcesolutions.com
info@ocworkforcesolutions.com

OC Workforce Solutions Center

28202 Cabot Road, Suite 140
Laguna Niguel, CA 92677
866-500-6587