Directive

Date: February 3, 2025 **Number:** WSD24-13

Local Area MIS Administrator and WSB CalJOBS SPOC Roles and Responsibilities

Executive Summary

This policy provides the guidance and establishes the procedures regarding the roles and responsibilities of the Local Workforce Development Area (Local Area) Management Information System (MIS) Administrator and Workforce Services Branch (WSB) CalJOBS[SM] Single Point of Contact (SPOC). This policy applies to all Local Areas and Employment Development Department (EDD) field divisions and is effective March 1, 2025.

This policy contains some state-imposed requirements. All state-imposed requirements are indicated by **bold, italic** type.

This Directive finalizes Workforce Services Draft Directive *Local Area MIS Administrator and WSB CalJOBS SPOC Roles and Responsibilities* (WSDD-255), issued for comment on January 31, 2024. The Workforce Development Community submitted 30 comments during the draft comment period. A summary of comments, including all changes, is provided as Attachment 4.

This Directive supersedes Workforce Services Directive *CalJOBS Roles and Responsibilities – Local Area MIS Administrator* (WSD19-08) issued on February 6, 2020, and *System Access SPOC and Ambassador Roles and Responsibilities for CalJOBS* (IAN19-004), dated August 16, 2019. This Directive remains active until further notice.

References

- Workforce Innovation and Opportunity Act (WIOA) (Public Law 113-128)
- Title 2 Code of Federal Regulations Part 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), Section 200.303
- Training and Employment Guidance Letter 39-11, *Guidance on the Handling and Protection of Personally Identifiable Information (PII)* (June 28, 2012)
- *California Civil Code* Part 1798: Information Practices Act of 1977
- Workforce Services Directive WSD24-12, *CalJOBS System Access* (January

27, 2025)
- WSD22-04, *WIOA Data Validation* (September 1, 2022)
- WSD21-03, *ETPL Policy and Procedures* (November 10, 2021)
- WSD20-11, *Pseudo Social Security Number in CalJOBS* (April 19, 2021).
- WSD18-02, *Data Change Request Form Procedure* (July 31, 2018)
- WSD17-06, *Organizational Information Change* (February 19, 2019)
- WSD17-09, *Mandated User of VOSGreeter Module in CalJOBS* (April 10, 2018)
- WSD16-23, *Mandated Use of One Integrated Data System – Direct Data Key Entry Into CalJOBS* (June 20, 2017)
- [Workforce Services Information Notice](#) WSIN17-15, *RR WARN Contact List and CalJOBS Manage WARN Notifications Module*
- *State Administrative Manual* Section 5300
- *Statewide Information Management Manual* Section 5305-A

Background

On May 5, 2014, the CalJOBS system became the federally recognized "system of record" for tracking and reporting California's Workforce Investment Act (WIA), and then subsequently the Workforce Innovation and Opportunity Act (WIOA) Title I, subtitle B, Title III Wagner-Peyser, Trade Adjustment Assistance (TAA), and Jobs for Veterans State Grant (JVSG) participants. As the system of record, CalJOBS provides a unified and streamlined intake and case management system that enables co-enrollment across programs, and consistent recording of data elements for reporting to the Department of Labor (DOL).

The Employment Development Department (EDD) Information Technology Branch's Information Security and Privacy Policy requires staff to agree in writing to protect information assets and to comply with EDD information security requirements. The Local Area MIS Administrators and WSB CalJOBS SPOCs assist staff with using the CalJOBS system and ensuring the safety of the data housed within the system. CalJOBS maintains Personally Identifiable Information (PII), sensitive, and confidential data, which must always remain secure.

Policy and Procedures

Local Area MIS Administrators and WSB CalJOBS SPOCs act as the point of contact for CalJOBS for their area. An area is defined as a Local Area for Local Area MIS Administrators and a Field Division for WSB CalJOBS SPOCs. The designated MIS Administrators and WSB CalJOBS SPOCs are responsible for the following activities:

- Provide CalJOBS support to their area.
- Serve as the point of contact for program performance and reporting.
- Provide CalJOBS assistance to staff in their area.
    - o Communicate CalJOBS updates and information between their area and the

CalJOBS Operations Unit, and vice versa.
- o VOSGreeter setup.
- o Submit system issues experienced by staff in their area.
- Manage CalJOBS staff user accounts for their area.
    - o Create new CalJOBS staff user accounts.
    - o Reset staff user account passwords.
    - o Deactivate staff user accounts.
    - o Update staff user accounts.

To conduct these activities, Local Area MIS Administrators and WSB CalJOBS SPOCs are granted "administrative" level privileges to create and manage CalJOBS staff user accounts. *Each Local Area can have up to three MIS Administrators, and each field division can have up to five WSB CalJOBS SPOCs. Each division can determine the areas covered by their WSB CalJOBS SPOCs (e.g., by region, cluster, division-wide, etc.).*

MIS Administrator and WSB CalJOBS SPOC Changes, Additions, and Deletions

To ensure the area has appropriate CalJOBS support, the CalJOBS Operations Unit must be informed if there is a change in the designation of an MIS Administrator or WSB CalJOBS SPOC. If making a change, the area must complete the *WSB CalJOBS^{SM} SPOC and MIS Administrator System Access Request Form* (Attachment 1). This form includes the information needed to add, delete, or make any changes to current MIS Administrator or WSB CalJOBS SPOC contact information. For MIS Administrators, this form must be signed by the Local Area Director (or their designee), and for WSB CalJOBS SPOCs, the form must be signed by the Division Chief (or their designee).

For Local Areas, this form replaces the MIS Administrator portion of the Type 2 change form listed in *Organizational Information Change* (WSD17-06). This form does not replace any other portions of the Type 2 Change Form. The Type 2 Change Form must still be completed to make any changes to Local Area Fiscal Administrator/Alternate or Rapid Response Coordinator.

CalJOBS Support

MIS Administrators and WSB CalJOBS SPOCs are responsible for providing CalJOBS support to staff in their area, which includes communicating system information, providing technical assistance, assisting with VOSGreeter setup, and troubleshooting and reporting system issues.

MIS Administrators and WSB CalJOBS SPOCs must provide technical assistance to their area's staff to ensure the proper use of CalJOBS. Each area should establish a process for staff to obtain CalJOBS assistance. If unable to answer the question, the MIS Administrator or WSB CalJOBS SPOC can then work with the CalJOBS Operations Unit at caljobsadmin@edd.ca.gov for assistance. Additional contact methods and resources will be provided to MIS Administrators and WSB CalJOBS SPOCs during onboarding.

Staff should not contact the EDD Information Technology Branch Help Desk or the CalJOBS vendor regarding CalJOBS issues or questions unless the CalJOBS Operations Unit provides that

direction to the WSB CalJOBS SPOC. To maintain a streamlined process and ensure timely responses, staff (other than MIS Administrators and WSB CalJOBS SPOCs) should not contact the CalJOBS Operations Unit directly. Staff who contact the CalJOBS Operations Unit and are not an MIS Administrator or WSB CalJOBS SPOC will be directed back to the designated contact for their area.

Program Reporting and Performance

MIS Administrators and WSB CalJOBS SPOCs serve as the point of contact for program data, reporting, and performance-related items. This includes, but is not limited to:

- Review and sign Data Change Request Forms. For more information on Data Change Requests, see *Data Change Request Form Procedures* (WSD18-02).
- Serve as the point of contact for data element validation, and other data validation and integrity issues. For more information about data validation, see *WIOA Data Validation* (WSD22-04).
- Assist with the assignment of pseudo social security numbers for CalJOBS accounts. For more information on this process, see *Pseudo Social Security Number in CalJOBS* (WSD20-11).
- MIS Administrators serve as the point of contact for performance-related items and communication.

Communication

Local Area MIS Administrators and WSB CalJOBS SPOCs act as a liaison between their area and the EDD's CalJOBS & Program Accountability Section. To ensure information is shared timely, the Local Area MIS Administrators and WSB CalJOBS SPOCs are expected to communicate relevant CalJOBS information with their area's leadership and staff (e.g., service providers, front-line staff, program managers, etc.).

The CalJOBS Operations Unit routinely sends out various communications. The *EDD CalJOBS Notifications* (green, red, and yellow notices) are sent to Local Area MIS Administrators and all WSB staff; however, the biweekly *EDD CalJOBS Updates Newsletter and weekly Blue Notice for New OPCs* is only sent to Local Area MIS Administrators and WSB CalJOBS SPOCs, so it is imperative that relevant information is shared with staff.

VOSGreeter Setup

The Local Area MIS Administrators are responsible for the set up and maintenance of the VOSGreeter module for their area. The WSB CalJOBS SPOC should work with the Local Area MIS Administrator on the setup of the module to ensure the check-in reasons meet the needs of WSB programs. WSB CalJOBS SPOCs are responsible for the setup of the VOSGreeter module for any office without a Title I partner. For more information on the VOSGreeter module, please see *Mandated User of VOSGreeter Module in CalJOBS*^{SM} (WSD17-09).

Reporting CalJOBS System Issues

The Local Area MIS Administrators and WSB CalJOBS SPOCs are critical in assisting the state

with ensuring CalJOBS is operating without errors. Local Area and WSB field staff utilize a wide range of CalJOBS features and interact with other users of CalJOBS (i.e., jobseekers, employers, and providers), so they are likely to identify system issues unknown to the CalJOBS Operations Unit. Local Area MIS Administrators and WSB CalJOBS SPOCs must have a process in place within their area to collect identified system issues from staff on an ongoing basis.

If a system issue is identified, staff must follow their area's policy for assistance. The MIS Local Administrator or WSB CalJOBS SPOC must verify the issue is a system issue and not user error. If it is an issue, the MIS Administrator or WSB CalJOBS SPOC must submit a completed *CalJOBS Issue Reporting Form* (Attachment 2) to the CalJOBS Operations Unit at caljobsadmin@edd.ca.gov as soon as possible. This form includes all the information necessary for the CalJOBS Operations Unit to troubleshoot an issue quickly and thoroughly. All correspondence will be between the Local Area MIS Administrator or WSB CalJOBS SPOC and the CalJOBS Operations Unit.

Use of the CalJOBS System and Automation

To ensure the security and stability of CalJOBS, use of automation to gain access to the system, run queries, extract data, or any other activities the state deems as detrimental to the site and/or the security of data is strictly prohibited. The violation of this policy may result in the suspension of MIS Administrator accounts, staff accounts, or any accounts associated with the violation. In addition to account suspension, any violation of this policy may result in the removal of certain staff privileges.

Managing CalJOBS Staff Accounts

The MIS Administrators and WSB CalJOBS SPOCs are responsible for managing the CalJOBS staff user accounts for their area. This includes creating accounts, deactivating accounts, resetting account passwords, and updating account access levels. This function is critical to ensure the safety of data within CalJOBS, so each area must have a process in place to ensure maintenance of CalJOBS staff accounts for their area is in alignment with this policy.

In alignment with *EDD's Information Security and Privacy Policy* and Local Area Subgrant Agreements, staff must receive information security and privacy awareness training, agree to comply with and understand the consequences of failure to comply with policies and procedures, and have a business need for the information resources prior to receiving access to CalJOBS. Additionally, access must be revoked immediately upon separation and/or failure to meet the access requirements. The following sections outline the requirements around system access for CalJOBS.

Create New CalJOBS Staff User Account

MIS Administrators and WSB CalJOBS SPOCs are responsible for creating new CalJOBS staff user accounts for staff in their area. Prior to creating a staff account, EDD staff must sign an Employee Confidentiality Statement (DE 7410). Non-EDD staff must sign the Vendor/Contractor Confidentiality Statement (Attachment E-1). All users must complete Information Security and Privacy Awareness (ISPA) training.

When requesting a CalJOBS staff user account, the requestor must submit a *CalJOBS System Access Request* form (Attachment 3) to the appropriate Local Area MIS Administrator/WSB CalJOBS SPOC. The request form indicates the most recent date the staff completed the ISPA training and signed (or refused to sign) the DE 7410, or Attachment E-1. It is the responsibility of the requestor to verify that the staff completed the DE 7410 or Attachment E-1 and ISPA training, and it is the responsibility of the Local Area MIS Administrator/WSB CalJOBS SPOC to ensure the access request form is completed appropriately prior to providing a CalJOBS staff account. A CalJOBS account cannot be created until all requirements are met by the staff. For additional information on who can submit a request, please reference *CalJOBS System Access* (WSD24-12).

Once the request form has been reviewed and approved, the staff account can be created. To ensure the appropriate privileges are provided to staff, CalJOBS privilege groups were created and are maintained by the CalJOBS Operations Unit.

When creating a staff account, Local Area MIS Administrators have access to the following groups:

- LWIA/CBO Staff
  This group should be utilized for any staff that are administering Title I services only.

- LWIA Intake Staff
  This group should be utilized for any staff that only require limited CalJOBS access to assist with basic participant needs, view access only to program applications, and no access to reports.

- LWIA Partner Staff
  This group should be utilized for any staff that are administering Title I services and need access to the Registration Only eligibility located in the Title III application.

- LWIA Partner Supervisor
  This group should be utilized if the staff requires the same access as LWIA Partner Staff, as well as needs access to manage staff within this group. This group has additional privileges necessary to assist in managing staff within the LWIA Partner Staff or LWIA/CBO Staff groups.

- ETPL Coordinators
  This group should be utilized for staff identified as Local Eligible Training Provider List (ETPL) Coordinators working with training providers.

- WARN
  This group should be utilized for staff working as Rapid Response Worker Adjustment and Retraining Notification (WARN) Coordinators.

- View Access
  This group should be utilized for staff needing only the ability to view basic information

on a jobseeker or employer account. The ability to edit any of the fields on the account is not allowed.

- View Access with Reports
  This group should be utilized for staff needing only the ability to view basic information on a jobseeker or employer account and can run reports. The ability to edit any of the fields on the account is not allowed.

When creating a staff account, WSB CalJOBS SPOCs have access to the following groups:

- DVOP
  This group should be utilized for any staff that are a Disabled Veterans' Outreach Specialist (DVOP).

- EDD El Centro Helpdesk
  This group should be utilized for any staff assigned to answer calls from the CalJOBS Public Help Desk.

- EDD WSB Staff
  This group should be utilized for WSB staff.

- EDD WSB Supervisor
  This group should be utilized for managers of WSB staff.

- LVER
  This group should be utilized for staff that are Local Veterans' Employment Representative (LVER).

- TAA Coordinators/Specialist
  This group should be utilized for staff that are TAA Coordinators or TAA Specialists.

By selecting a privilege group, the appropriate privileges are provided to the staff user account. If the Local Area MIS Administrator/WSB CalJOBS SPOC deems it necessary to provide access to a staff member, the staff's user account can be adjusted manually. To ensure data integrity and system stability, Local Area MIS Administrators and WSB CalJOBS SPOCs do not have access to all privileges.

If a CalJOBS staff user account needs to be created under a privilege group other than the groups listed above or a specific privilege unavailable to be changed needs to be updated, the Local Area MIS Administrator or WSB CalJOBS SPOC must contact the CalJOBS Operations Unit (caljobsadmin@edd.ca.gov).

Once the staff user account is created, the CalJOBS username and temporary password will be provided to the staff with a carbon copy (cc) to the requestor. The temporary password will expire after 24 hours. The first time the staff logs into CalJOBS with their username and temporary password, they will be immediately prompted to establish a new password. Staff must be reminded that their username and password must be kept confidential, and that they should

never access their CalJOBS staff account on a personal device (e.g., laptop, personal computer, cell phone, etc.).

During the account creation process, the staff's approved CalJOBS System Access Request Form must be uploaded to their CalJOBS staff user account. Additionally, since internal records are unavailable, Local Area MIS Administrators must also upload a copy of the completed ISPA certificate and the signed Vendor/Contractor Confidentiality Statement (Attachment E-1).

Resetting Staff User Account Password
Local Area MIS Administrators and WSB CalJOBS SPOCs are responsible for resetting passwords for their staff's CalJOBS user accounts. When requesting a CalJOBS password reset, the staff's requestor must submit a CalJOBS System Access Request form (Attachment 3) to the appropriate Local Area MIS Administrator or WSB CalJOBS SPOC. For additional information on who can submit a request, please reference *CalJOBS System Access* (WSD24-12).

Once the request form is reviewed and approved, the Local Area MIS Administrator or WSB CalJOBS SPOC will reset the staff's password. Once the staff user account is reset, the CalJOBS username and temporary password will be provided by the Local Area MIS Administrator or WSB CalJOBS SPOC to the staff with a cc to the requestor. The first time the staff logs into CalJOBS with their username and temporary password, they will be immediately prompted to establish a new password. Staff must be reminded that their username and password are to be kept confidential.

Maintenance of CalJOBS Accounts
To ensure compliance with requirements, requestors (manager/supervisor role) must submit a CalJOBS System Access Request Form annually with updated dates for the *Employee Confidentiality Form* (DE 7410) or Vendor/Contractor Confidentiality Statement (Attachment E-1) and ISPA completion. Staff (except for EDD staff) must also submit an updated copy of the signed Vendor/Contractor Confidentiality Statement (Attachment E-1) and their ISPA training certificate with the request. Local Area MIS Administrators and WSB CalJOBS SPOCs must upload the required documents to the staff's user account where it is available for monitoring purposes. For additional information on who can submit a request, please reference *CalJOBS System Access* (WSD24-12).

Deactivation of CalJOBS Staff User Accounts
Local Area MIS Administrators and WSB CalJOBS SPOCs are responsible for deactivating CalJOBS staff user accounts. To maintain the security of the data housed within CalJOBS, a staff's CalJOBS account must be revoked prior to, or at the time of their separation from the organization, or when there is no longer a business need for the account. Local Area MIS Administrators and WSB CalJOBS SPOCs are responsible for developing a policy that ensures CalJOBS staff user accounts are deactivated no later than the time of a staff's separation.

To deactivate an account, requestors are required to complete and submit a CalJOBS System Access Request form (Attachment 3) with the staff's separation or deactivation date to their Local Area MIS Administrator or WSB CalJOBS SPOC. The Local Area MIS Administrator or WSB

CalJOBS SPOC must upload the form to the staff's CalJOBS account before deactivation where it will be available for monitoring purposes. For additional information on who can submit a request, please reference *CalJOBS System Access* (WSD24-12).

System Access Training
All Local Area MIS Administrators and WSB CalJOBS SPOCs will receive additional training on the roles and responsibilities outlined in this Directive prior to receiving their administrative account.

System Access Monitoring
As part of system access oversight responsibilities, the CalJOBS Operations Unit will review a random sample of CalJOBS accounts quarterly. New and existing accounts will be reviewed to ensure that all required documentation has been uploaded and kept up to date. Deactivated accounts will be reviewed to ensure that deactivation occurred within the required timeframe. Additional documentation may be requested to verify that the DE 7410 or Attachment E-1 and ISPA training is completed as outlined on the request form. The results of the review will be shared with the appropriate Local Area Director and MIS Administrator, or Division Chief and WSB CalJOBS SPOC, for informational and accountability purposes.

Action

Bring this Directive to the attention of all affected staff. Failure to adhere to procedures outlined in this guidance may result in the revocation of a Local Area MIS Administrator or WSB CalJOBS SPOC's privileges.

Inquiries

If you have any questions, contact CalJOBS Operations Unit at caljobsadmin@edd.ca.gov.

/s/ JAVIER ROMERO, Deputy Director
Workforce Services Branch

Attachments:

1. WSB CalJOBS SPOC and MIS Administrator System Access Request Form (PDF)
2. CalJOBS Issue Reporting Form (PDF)
3. CalJOBS System Access Request Form (PDF)
4. Summary of Comments (DOCX)

The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.