



**DIVISION OF WORKFORCE DEVELOPMENT
ADMINISTRATIVE POLICY**

Policy Title: Toolbox 2.0 Change Request Policy No: DWD-ADM-(letter)	Issued: January 6, 2009	Approved by: 
Function Area: Administration	Revised:	Page: 1 of 2

Purpose: To provide guidance on the procedure for acceptable and unacceptable reasons for submitting a change request.

Policy: DWD Issuance 08-2008 Toolbox 2.0 Change Request Policy and Procedure

Procedures:

Acceptable reasons for submitting a Change Request

A change request is considered only when the change affects benefits or payments to the customer/participant or in situations where there is a potential or actual breach of confidentiality. Examples include:

- Incorrect Social Security Number entered
- Customer soft exited from TB2 and is deceased within 3 quarters, therefore requiring hard exit; 5 hard exit reasons apply as well
- Customer receiving training level service with service inadvertently not entered into TB2: although currently paying for school, TB2 would require “unexit” to continue paying for training (WIA)
- Activity/service date change that involves a TRE or WRE payment. (CAP)
- Activity or service date change that affects CAP work participation rate.
- Deleting a case note that contains inappropriate, confidential or sensitive information.

Unacceptable reasons for submitting a Change Request

A change request will not be approved if used for changes that do not affect payments or benefits, or solely to enhance performance. Examples include:

- Incorrect information entered on eligibility (i.e. low income was “Y”; employed was “Y”; income not entered, etc.)
- Activity/service date change that does not involved a TRE or WRE payment, and has already been federally reported. (CAP)

NOTE: In cases where incorrect information on eligibility must be changed, TB2 users must individually enter the corrected information in a new eligibility that accurately reflects the customer’s situation at the point of initial intake. A change request must then be submitted to have the exit snapshot (which was captured at the point of program enrollment) adjusted to reflect the correct information. Additionally, users must enter a case note to explain the reason for adjusting information and why performance is impacted.



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The procedure for submitting change requests to DWD Central Office for necessary action is as follows:

CONDITION:	<i>An issue appropriate for a change request occurs</i>
RESPONSIBLE PARTY	ACTION
Staff person	Completes change-request form as necessary. See attached revised form, DWD-5_AI (11-08).
Career Center Functional Manager (or his/her designee)	Reviews change request form and approves or denies submission to Central Office.
Functional Manager or designee (If change is approved)	Signs the change-request form and faxes to DWD Central Office at (573) 751-9528 or scans and emails to tbchangerequest@ded.mo.gov for logging and distribution to the appropriate Central Office Manager (or designee) responsible for the program that is affected by the approved change request.
Central Office Program Manager or designee	Reviews the change-request form for appropriateness of the request and approves or denies the change.
Central Office Program Manager or designee (If change is approved)	Signs and hand delivers the form to the DWD Technical Support designee.
DWD Technical Support	Facilitates completion of the requested change.
DWD Technical Support (On completion of the change)	Emails the submitting Functional Manager and Central Office Program Manager or designee to communicate the date of change action and includes a copy to the support staff person to log as complete.
Central Office Program Manager or designee (If change is denied)	Emails the authorized person submitting the request and copies DWD Technical Support explaining why the change request was denied.