O-06 Data Correction Request Procedure

Updates:
7/11/2013: Updated based on State replaces previous policy
2/25/2005: Revised based on State revision
1/20/2005: First posted based on State policy 04-12

Background: All ASSET users are responsible for entering accurate and complete participant data in ASSET and there are several tools and resources available to assist case managers and service providers. When errors are noted, case managers should try to make changes before following the procedures below, as some fields are editable or check with local approvers as they have more access to locally editable fields. For changes that cannot be made locally, case managers should follow the Change Request Process.

Change Request Process:
1. Complete request in ASSET:
- Select "Staff Requests" in the ASSET menu and click the "Add Request" action button in the Request Summary screen. The Staff Request Details screen will appear;
- Select Data Change as the Request Type. Enter the PIN and select Title 1 as the Program. The screen will change to include a "needs Approval By" field;
- Select the approver from the drop-down menu - Lisa Maylen;
- Enter a synopsis of the request under "Summary" (such as Add Credential, or Change Funding Source). Include an explanation for the need for the request under "Reason". Under "Description", provide any additional information needed to complete the change such as identifying the component that needs to be changed, the correct dates if applicable, funding source, etc.).
- Print a copy of the screen for the file;
- Click "Save" to send to the approver.

2. Local approval process:
- Monitors participant data for completeness and accuracy (quality assurance).
- If the request is appropriate and complete, the approver will change the status of the request from Pending to Approved;
- If the approved request relates to performance or policy, the approver adds the Local Program Liaison initials in the "Summary" section. The approved request goes directly to the LPL for review and is then forwarded to the State reviewer.
- If the request is incomplete or unclear, the approver will contact the case manager for further details.

3. State approval process:
- The State reviews the request, makes the changes and changes the status of the request from Approved to Completed.

4. Final process:
- Local approver monitors the change status and notifies the case manager by e-mail when the status of a request is changed by the State to Completed.