Update 2006-2: Common Place Handbook
Integrated Document Management (IDM) and General Clean-up

Background
Due to the implementation of CalWIN in June of 2005, it is necessary to update the Common Place Handbook to reflect new terminologies and business processes. Completed chapters will be released on a flow basis.

Changes
This Update contains changes to Chapters 1, 20, 21, 41 and 53.

Charts/COLAs
Chapter 1 (Charts/COLAs) in the Common Place Handbook only contains cross-references to the Chart Book. It was originally issued to assist staff in locating information which had been moved from the Common Place Handbook to the Chart Book.

The Chart Book is now available on the Intranet website with a Table of Contents which contains the same information. Therefore, Chapter 1 of the Common Place Handbook is no longer required and is deleted.

Case Filing
The original contents of Chapter 20 “Case Filing” are deleted since this procedure is now obsolete.

Integrated Document Management (IDM)
Effective June 1, 2006, ALL new documentation received for an open CWES or Benefits case MUST be submitted to be scanned. No further correspondence is to be filed or added to the paper case.

Chapter 20 has been renamed “Integrated Document Management (IDM)” and now contains information regarding the IDM system.
Some of the highlights included in Chapter 20 are:

- Intake and Continuing IDM policies,
- IDM Filing Structure,
- IDM - Benefit Document chart showing the most common documents/forms and into which category they are to be scanned,
- IDM - CWES Document chart showing the most common documents/forms and into which category they are to be scanned,
- IDM Periodic Reports Process,
- Partial Case Scan Process,
- IDM Quality Assurance Process,
- Client Access to IDM Documents,
- Miscellaneous IDM procedures,
- Benefits Form Number IDM Document Scan Chart, and
- CWES Form Number IDM Document Scan Chart.

Case Splitting

Chapter 21 “Case Splitting” is deleted since this procedure is now obsolete. If a case needs splitting, it is to be scanned instead following the partial scan process.

Subpoena and Courtroom Testimony Guide

The following changes were made to Chapter 41:

- Revised the name of the chapter from “Guide to Courtroom Testimony” to “Subpoena and Courtroom Testimony Guide”.
- Added and updated the subpoena process established in Agency Memorandum #98-142 and in the 04/02/04 Official Approved Directive entitled “Subpoenas and Court Appearances”.
- Updated the Statement of Facts form numbers.

Systems Controls

Chapter 53 (System Controls) in the Common Place Handbook only contains a basic statement of the requirement for staff to clear MEDS error messages. The New Business Models remind staff that MEDS error messages must be cleared and the User’s Guide to State System contains detailed information on the MEDS system. Therefore, Chapter 53 of the Handbook is no longer required and is deleted.
Implementation

The changes in this Update are effective upon receipt except for the “ALL new documentation received MUST be scanned” policy which is effective June 1, 2006.

Supervisors

EW and CWES Supervisors must review this Update at their next unit meeting, but no later than May 31, 2006.

Forms

The “IDM DEBS Document Properties Change Request” (SC 183) form is added to request a change when incorrect information is discovered in the IDM system. For example the date of birth or Social Security number is incorrect or a document has been imaged under the wrong Case Number, Category or Subcategory.

The SC 183 form is available on the SSA intranet forms website and is to be printed by staff on an as needed basis only.

Clerical

See “Case Filing”, “Integrated Document Management (IDM)”, “Case Splitting” and “Forms” for clerical information.

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