Update 2008-8: Common Place Handbook
Client / Third Party Case Reviews

Background

All County Letter #07-29 titled, “Access to Case Records and Use of Manual Workarounds” was issued as a reminder to counties that clients and Authorized Representatives are entitled to have access to review their physical case record, documents scanned into the Integrated Document Managing (IDM) system, as well as information entered into CalWIN.

There may be instances when clients request permission to have their case reviewed by a third party known as an "Authorized Representative." Typically, when clients request permission to have another party review their case record it is generally related to a fair hearing.

This section defines policy for Cases / IDM / CalWIN reviewed by:

• The client,
• A third party, and
• A third party once a fair hearing is filed.

Changes

The following changes are made to the Common Place Handbook:

Chapter 1

A new chapter is added which describes the client’s right to review his or her case record. It further illustrates policy when a third party is involved and introduces two new forms which authorize the release of information. These forms expire after one year.

[Refer to “Client / Third Party Case Reviews,” page 1-1]
This chapter is updated to include a cross reference to Chapter 1 for Authorized Representatives whenever a case review is requested once a fair hearing has been filed.

[Refer to “Appeals,” page 24-1]

This chapter is updated to include the two new forms associated with this policy and the fastener where they are filed in IDM.

[Refer to “Integrated Document Management (IDM),” page 31-1]

This change is effective immediately upon receipt of this handbook.

The following two new forms were developed to implement this policy:

- SC 143 - “Consent to Release Social Services Records to an Authorized Representative for a State Hearing,” and
- SC 145 - “Consent to Release Social Services Records to an Authorized Representative.”

These forms are available on-line only.

Office Management Coordinators (OMCs) must ensure this update is reviewed at their next clerical meeting, but no later than 06/30/08.

Social Services Program Managers (SSPMs) must ensure this update is reviewed at their next bureau meeting. They must also ensure that Eligibility Work Supervisors review this update at their next unit meeting, but no later than 06/30/08.

Many thanks to Deputy County Council, Kristin Baker, for her assistance in developing these new forms.

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