Update 2008-16: Common Place Handbook
Client/Third Party Case Reviews

Background
Staff requested that additional information be provided in certain areas with specific examples for clarification purposes.

Changes
The following changes are made for better clarity:

• Section 1 is expanded to include that documentation in Maintain Case Comments may also be reviewed by clients and/or their Authorized Representative (AR).

• Examples are provided in Section 1.2 on how to protect privileged information.

• Clarification is added to Section 1.3 that the Eligibility Worker (EW) must prepare ahead of time and determine what screens/documents will be reviewed during the interview.

• Sections 1.3 and 1.4 provide clarification that the client/AR must never be allowed to navigate through the Integrated Document Management (IDM) System or CalWIN. The EW must navigate through both systems for the client/AR.

[Refer to “Client / Third Party Case Reviews,” page 1-1]

Implementation
These clarifications are effective immediately upon receipt of this Update.
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