Update 2009-5: Common Place Handbook
Integrated Document Management (IDM)

**Background**

The Integrated Document Management (IDM) system was implemented to improve access to work-related documents by Social Services Agency (SSA) employees by providing faster, easier, and secure retrieval of documents and case information by multiple concurrent users. The IDM system allows SSA to preserve and back up existing documents while reducing storage space requirements.

As part of the recommendations made by Public Consulting Group (PCG) in December 2007, the agency began the Centralized IDM process, which increases the efficiency of the imaging system by standardizing the processes.

**Changes**

With the implementation of the Centralized IDM process, certain changes are necessary to achieve a successful transition. The major changes included in this Update are as follows:

- The Filing Protocol Procedures is added to the “Filing Structure in IDM” Section to ensure adherence (31.3).
- The Partial Scan of Cases section is removed from the chapter as this is no longer applicable.
- The Julian Street Mail Room is changed to Centralized Support Services Mail Center (31.6).
- The Partial Scan for Intake Cases section is changed to Full Scan for Intake Cases (31.2.3).
- The IDM Quality Assurance section is expanded to provide information on how to maintain the scanning equipment and obtain quality images (31.8).


- Additional forms with filing instructions are added to the Category/Subcategory chart (31.4 & 31.5).

- All SC forms are changed to SCD.

**Note:**
Currently SC forms are in the process of being converted from SC to SCD, and the Forms Committee anticipates a full conversion by Summer of 2009. However, for the purpose of simplification, all of the SC forms listed in the Common Place Handbook are changed to SCD with this Update.

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**Implementation**
Changes contained in this Update are effective immediately.

**Forms**
All SC Forms are changed to SCD.

**Programs**
These changes impact all programs using the forms listed in the chapter including Food Stamps, CalWORKs/RCA/ECA, CAPI and GA.

**Clerical**
Office Management Coordinators must review this handbook section with their respective clerical staff and ensure they adhere to the filing instructions specified in the Common Place Handbook when scanning documents into the IDM system.

**Kudos**
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