Update 2009-7: Common Place Handbook
Case Narration

Background

The CalWIN Support Initiative (CSI) Spotlight Committee offered a recommendation that the Documentation Section of the Common Place Handbook be updated to provide further clarity for staff in terms of required documentation at intake.

Changes

The following sections of the Documentation chapter are expanded for greater clarification:

- This Chapter is renamed from “Documentation” to “Case Narration.” This change is necessary to conform to state and federal terminology, as well as our soon to be released Case Narration Tool.

- Section 11.2 is updated to clarify the definition of “information not recorded elsewhere.”

[Refer to “[Maintain Case Comments] Window,” page 11-1]

- A note is added to Section 11.3.8 to remind staff that the term “illegal alien” is not to be used. The term “undocumented non-citizen” must be used instead.

[Refer to “Personal Feelings,” page 11-4]

- Section 11.3.9 is added to remind staff that it must be narrated when interpreter services are provided to assist our clients.

[Refer to “Interpreter Services,” page 11-4]
Section 11.4.1 is updated to clarify that not all mandatory forms issued to clients at intake must be documented in Maintain Case Comments. Instead, documenting “Provided and explained all documents in the (name of program[s] applied for) intake packet” will suffice.

[Refer to “Intake / RRR,” page 11-4]

Implementation
This policy is already in effect and is not new information, with the exception of the retitling the chapter to “Case Narration.” This update is merely a clarification of existing policy.

Kudos
Many thanks to Hung Do, Delia Zapata, Olivia Cuevas, Jack Silva, Guillermo Cáceres, Huong Dang, Gerardo Silva and Hilda Friedman for their feedback on how to streamline documentation for mandatory forms provided at intake.

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