Update 2014-4: Common-Place Handbook
CalWORKs SSI Advocacy Records Retention

Background
Common Place Handbook Chapter 19 provides a reference for scanning correspondence within the Integrated Document Management (IDM) system. This point of reference specifies the forms that are scanned under the various categories and subcategories.

Changes
Effective immediately, CalWORKs SSI Advocacy related documents are to be transitioned as follows:

- All closed CalWORKs SSI Advocacy physical cases are to be sent to the Retention Center for storage after one month of closure.
  
  [Refer to “Closed Case IDM Policy,” page 19-34 for existing procedures].

- All documents for open CalWORKs SSI Advocacy cases are to be transitioned into IDM by scanning into the appropriate SSI Category/Subcategories that are currently being used by GA SSI Advocacy.
  
  [Refer to “Category/Sub-Category - SSI Advocacy Chart,” page 19-25 for SSI Advocacy chart].

Implementation
This change is effective upon receipt of this update.

Handbook Chapters
With this update, the following Handbook Chapters are updated:

- CP HB Chapter 19, “IDM”
• CWES HB Chapter 7, “CalWORKs SSI Advocacy”

Clerical

Clerical staff is to begin preparing CalWORKs SSI related documents for scanning as per existing IDM procedures.

DENISE BOLAND, DIRECTOR,
Department of Employment and Benefit Services

Contact Person: Jesus Manzanero, Application & Decision Support Specialist II, (408) 755-7540.