Update 2015-15: Common Place
Case Transfers

Background
Agency policy on case transfers is documented in the Common Place Handbook, Section 50. There have been several changes within the agency over the past few years. This Update is to bring this section of the handbook up to date.

Changes
Minor changes have been made to the contents of the Case Transfers chapter of the Common Place Handbook to reflect the changes that have occurred in the agency.

Case Assignment
References to the transfer of physical cases were removed.

Confidential/Sensitive Cases
The following changes were made to the Confidential/Sensitive Cases section:

- References to the former East Valley office were removed and replaced with the appropriate district offices.
- Worker caseloads for continuing offices were changed to unit or district office caseloads.
- The Task Management Tool (TMT) was added to certain processes.

[Refer to Common Place “Confidential/Sensitive Cases,” page 50-6]

Pending CalWIN Tickets
References to the CalWIN Application Triage Support (CATS) Helpdesk were changed to Data Analysis, Program Integrity and Research (DAPIR) Helpdesk.
Adult Only & Family Based Cases

Instructions for handling cases that change from Adult Only (AO) to Family Based (FB) are added.

[Refer to Common Place “Cases Changing from Adult Only to Family Based,” page 50-18]

Implementation

The changes in this Update were already implemented throughout the agency.

Clerical

Refer to the “Changes” section in this Update.

DENISE BOLAND, DIRECTOR,
Department of Employment and Benefit Services

Contact Person(s): Maria C. Savin, Application & Decision Support Specialist, (408) 755-7540.