Update 2016-10: Common Place
Client/Third Party Case Reviews

Background
A client or Authorized Representative (AR) designated by the client, must be allowed to review all non-privileged, non-confidential information contained in their case record during normal business hours.

Change
A form has been developed by the State titled “Response to Request to Inspect Case Record” (CW 2213). The CW 2213 documents the case records the client:

- has requested,
- were provided for inspection, and
- that he or she requested to inspect that have been withheld based on privilege or confidentiality.

Implementation
This change is effective upon receipt of this update.

Documentation
Any request by a client or their AR to review their case records, must be clearly documented in the Maintain Case Comments window in CalWIN.

Forms
The CW 2213 replaces the existing County form, “Removal of Privileged/Confidential Information” (SCD 2251) and is available on line. The SCD 2251 is now obsolete and must no longer be used.

Programs
The information in this Update pertains to CalWORKs, CalFresh, state-funded TCVAP and RCA.
DENISE BOLAND, DIRECTOR,
Department of Employment and Benefit Services

Contact Person(s): Maria C. Savin, Program Coordinator, (408) 755-7540.