

# **STANDARDIZED CASE COMMENTS**

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# Purpose

Operational need required that the existing case comment guidelines and template be revised. A work group was formed to address all program requirements and the needs of FRC staff.

The revised guidelines and template will ensure:

- Consistent case documentation
- All client contacts will be documented

# Solution

Beginning in August 2012, Eligibility Operations and Corrective Action began working together to revise the current policy to refine guidelines for documenting customer contacts that require case action occurring outside of an intake, renewal, or status report processing.

# Case Comment Guidelines

The revised case comment guidelines have been updated to include instructions to document all client contacts for:

- CalWORKs
- CalFresh
- General Relief
- Low Income Health Program (LIHP)
- Medi-Cal (except for HCA and Foster Care)

# Template Revisions

Hewlett Packard will be making the following revisions to the web-based template:

- Addition of a Case Comments Template main page will allow staff to easily navigate to the sections that are relevant to their case
- Addition of a Quick Contact section for staff to easily document quick actions taken on a case
- Additional questions added to existing sections to assist staff in documenting information required for the case

# Outcomes

CalWIN has already been updated to better identify case comments made to document Reception/Lobby contacts and Intakes.

The case comments policy will be centrally located in the Eligibility Desk Guide (EDG) for easy accessibility for all staff.

FRC staff will be trained on the revised guidelines and functionality of the template.