

January 30, 2013

CalWORKs Program Guide Letter No. 282

Subject **DOCUMENT CAPTURE PROCEDURES FOR EMPLOYMENT SERVICES CONTRACTORS**

Effective Date January 30, 2013

Purpose The purpose of this CalWORKs Program Guide (CPG) Letter is to inform staff of a new section in the CalWORKs Program Guide (10-260 A.) which outlines Document Capture Procedures for Employment Services Contractors.

Background San Diego County HHSA has implemented document capture (formerly known as Imaging) of CalWORKs case documents into an electronic repository known as the Document Retrieval System (DoReS). Eligibility cases are now virtual in the CalWIN System and the accompanying documentation is captured into DoReS.

To support the County's document capture efforts and promote information sharing across Employment Services and Eligibility sites, Employment Services Contractors shall implement document capture of Welfare-to-Work (WTW) cases based on Go Live date(s) established by Eligibility Operations and utilizing policies outlined in CPG 10-260 A., as well as related trainings, guides and desk aids posted in the [CalWIN Intranet](#) for Employment Services staff.

Summary of Additions A new chapter, [10-260 A.](#), Document Capture Procedures for Employment Services Contractors, has been added to the CPG and includes the following information:

CPG Section	Title	Program Updates/Changes
10-260 A.	Document Capture Procedures for Employment Services Contractors	Added new section to CPG
	Table of Contents	Added a Table of Contents

Background	Added new section
Document Capture Guidelines	Added new section
Exceptions to 12-Month Limit for Document Capture of Existing WTW Documents	Added new section
Document Preparation Basics	Added new section
Use of Document Capture Templates	Added new section
Program Approved Workarounds	Added new section
Case Preparation Training for Employment Contractors	Added new section
KOFAX (Batch Manager) Training for Document Capture Station Staff	Added new section
Document Capture Station Staff Responsibilities	Added new section
Document Retention Requirements	Added new section
Access to Editing/Deleting Documents in DoReS	Added new section
Document Capture Go Live Expectations	Added new section
Hierarchy of Document Capture Efforts	Added new section
Transfer of Captured Cases to Record Library (RL)	Added new section
Monthly Monitoring of WTW Document Capture Progress	Added new section
Accelerated Document Capture Expectations	Added new section
Related Terminology	Added new section

SUSPENDED

3/12/13

**ACCESS
Impact**

No Impact

**Appeals
Impact**

No Impact

**Automation
Impact**

No Impact

**CalFresh
Program
Impact**

No Impact

**Child Care
Program
Impact**

Employment Services Contractors shall ensure that Child Care Program staff has access to DoReS in order to view captured documents.

ECMs shall continue to provide a hard copy of the 27-128 form in the Child Care Referral Packets.

At this time the Child Care Program is not participating in the Document Capture process. For this reason, the Overpayment capture instructions in this material pertain solely to WTW Overpayments.

**CMS/LIHP
Program
Impact**

No Impact

**Corrective
Action Impact**

No Impact

**Forms
Impact**

No Impact

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Imaging Impact

Employment Services contractors shall implement Document Capture based on procedures contained in this letter, CPG 10-260 A, as well as related trainings, guides and desk aids posted in the [CalWIN Intranet](#) for Employment Services staff. .

Internal Investigations Impact

No Impact

Medi-Cal Impact

No Impact

Quality Control (QC) Impact

QC will cite the appropriate error on any case the does not comply with the requirements outlined in this letter.

System Security Impact

Employment Services Contractors shall ensure that appropriate staff has access to CITRIX and/or DoReS for Document Capture purposes. In addition, contractors shall ensure that their staff logs into both automated systems at least once per month in order to preserve their access.

The Knowledge Center Impact

No Impact

Director Approval

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Manager Contact

CalWORKs Program

LH:as

SUSPENDED OFFER 3/12/13