Revised Date:
5/16/2019

Purpose:
This document outlines the basic requirements for validating customers' contact information.

Background:
Due to outdated contact information, many customers are missing scheduled intake/renewal appointments and the Document Processing Center (DPC) receives a large volume of returned mail that must be reviewed and processed. To ensure contact information remains current in CalWIN, Human Services Specialists (HSS) must verify customer contact information at every interaction. HSS will verify address (physical & mailing), home phone number and cell phone number.

Purpose:
This section is updated to exclude the requirement of validating customer email address at every contact.

Policy:
At every customer contact with an FRC or Access/A2H call, the HSS will validate the following information with the customer:
- Address (Physical & Mailing)
- Home Phone
- Cell Phone

Procedure:
The appropriate CalWIN screens need to be updated when validating customers' contact information. These screens include, but are not limited to:
- Collect Case Summary Detail Window
- Collect Individual Demographics Detail (including the "Individual Address" button) Window
- Collect Communication Detail Window
- Enter appropriate case comments

Program Impact/s:
All Programs

References:
N/A

Sunset Date:
This policy will be reviewed for continuance by 5/31/2022

Approval for Release:

Rick Wanne, 5-16-19

Rick Wanne, Director
Eligibility Operations