

# County of San Diego, Health and Human Services Agency (HHSA) Policy and Procedures Guide

## Quality & Eligibility Support Departments (QESDs) Standardized Case Comments Policy and Procedures Guide

Page

1 of 2

### Issue Date:

10/19/2020

### Background:

Case comments are an essential part of the record keeping process for all County cases. It allows HHSA staff to track customer history on cases and to determine when and why actions were completed. Case comments are a vital way of ensuring that actions are done timely and correctly in addition to ensuring customers are given the most comprehensive and up-to-date information. QESD developed a Case Comment Template to align with Eligibility Operations Case Comment Template policy.

### Purpose:

The purpose of this document is to establish the use of the QESD Case Comment Template.

### Policy:

Case comments are required to document all customer contacts and all case actions. The QESD Case Comment Template is now mandated for use for all QESD actions.

Staff must use the Acceptable Abbreviations and Acronyms List, located in the Desk Aids section of the Eligibility Operations SharePoint site, when making entries in case comments to ensure all case comments are clear and consistent.

### Procedures:

QESD Human Services Specialists (HSSs) will use the QESD Case Comment Template located in the QESD SharePoint site. The HSS will choose the appropriate program(s) and task, then follow the case comment template flow to ensure all case action is documented correctly. If needed, the HSS will enter any additional information to ensure a complete entry of actions is documented. Once all entries are completed staff will copy and paste the output into CalWIN.

All case comments must contain the following elements to be considered acceptable and complete:

- **Who** is affected by the action
- **What** is the action
- **How** the case is affected
- **When** will the action/change take effect

In addition, case comments must include:

- Requested Verifications (if non-mandatory verifications are requested due to questionable information, details must be identified)
- Client Correspondence issued *outside* of CalWIN
- Benefit amounts and results from action taken;
  - o Grant/Benefit amount(s)
  - o Increase or Decrease
  - o Overpayment or Underpayments
  - o Supplements

**County of San Diego, Health and Human Services Agency (HHS)**  
**Policy and Procedures Guide**

**Quality & Eligibility Support Departments (QESDs) Standardized Case  
Comments Policy and Procedures Guide**

**Page**

2 of 2

Case Comments Protocol

Case comments are considered public record. Entries must be objective and contain only facts that are relevant to the case. Case comments should not contain:

- All capitalized letters
- Personal feelings or opinions
- Unapproved abbreviations
- Inappropriate language or slang
- Inappropriate comments about other staff or offices

**References:**

Standardized Case Comments Policy and Procedures Guide  
Standardized Case Comments Processing Guide

**Sunset Date:**

This policy will be reviewed for continuance by 09/30/2023.

**Approval for Release:**

*Rick Wanne, 10-19-20*

Rick Wanne, Director  
Eligibility Operations