

45. IDM and Order of Filing in IDM

45.1 General

With the implementation of CalWIN all cases will be electronic and all documents received from clients that are required to be retained, will be scanned and stored in the IDM system.

45.2 Filing Order

Forms and documents are to be filed in IDM in the appropriate sections in inverse order by date (most recent date on top). Refer to filing Structure in IDM below.

45.3 Filing Structure in IDM

Documents are to be entered into the IDM system in a **CONSISTENT** orderly manner. They are stored under categories and then subcategories which are as follows:

Table 45-1:

- PERMANENT VERIFICATION
- REPORTS/INCOME
 - BENEFITS
 - CWES
- CWES
 - F1 - SCREEN SHOTS
 - F2 - APPLICATION
 - F3 - CONTACT ACTION SUMMARY
 - F4 - CHILD CARE
 - F5 - SUPPORTIVE SERVICES
 - F6 - WTW AGREEMENTS
 - F7 - GOOD CAUSE
 - F8 - NON-COMPLIANCE
 - F9 - EMPLOYMENT VERIF
 - F10 - OTHER CORRESPONDENCE
 - CL/T - CORR / DISCONTIN / NONCOMP
 - CL/T - REGISTRATION / ORIENTATION
 - CL/T - SCHOOL VERIF / ATTENDANCE
 - CL/T - SUPPORTIVE SERVICES

45.3.1 CWES Forms Cross Reference Chart

For a list of CWES client correspondence by Category/Sub-Category [Refer to Common-Place Handbook, “[Category/Sub-Category - CWES Chart](#),” page 19-14.] Or, for a list of CWES client correspondence in numeric order [Refer to Common-Place Handbook, “[CWES FORMS CROSS REFERENCE CHART](#)” on page 19-47.]