Batch Correspondence

05/26/09

System Maintenance Change Request (SMCR)
SMCR-666

AMENDMENTS

Amendment #	Description	Date
1.0		

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1 INTRODUCTION

1.1 DEFINITIONS, ABBREVIATIONS AND ACRONYMS

Table 1-2 lists the definitions, abbreviations and acronyms that may be used within this document:

Table 1-2, Definitions, Abbreviations and Acronyms

Term	Definition
CCS	California Children's Services
CMS	Children's Medical Services
DHCS	Department of Health Care Services
SMCR	System Maintenance Change Request
Suppression	The removal of a specific correspondence or SAR which has already been included in the batch print queue
Print Queue	Contains letters and SARs for transmission to participating counties. Letters must be in a Ready to Send or Sent status.
SAR	Service Authorization Request

1.2 PURPOSE

The purpose of this SMCR is to create print queue in CMS Net Web to print letters in batch mode and to modify the current correspondence functionality to auto generate series letters. County participation in the print queue is optional. Non participating counties series letters will be auto generated as Ready to Send in Web Correspondence for completion. Counties must select send for the letters to be sent.

1.3 OVERVIEW

Due to the size and complexity of counties with large case loads the CMS Net print functionality must be changed. Creation of a print queue allow SARs, correspondence, and removal from and deletion of correspondence in the batch.

Case management staff resources have been reduced; therefore, an evaluation of which letters require the 2nd and 3rd to letter to be generated. The defined series letters have the 2nd and 3rd letter generated automatically.

A PDF file is created daily and transmitted to the county (to be determined if mode is direct printer or FTP) to be used of mass mailing or to a centralized mailing unit.

2 OVERALL DESCRIPTION

2.1 SCOPE

	Business Rule
1.	Generate the 2nd & 3rd Series Letters automatically.
2.	Create a page view results window (not a hardcopy report) of letters generated with an indicator displaying which letters were generated automatically.
3.	Generate on a per batch (daily) basis a PDF file of correspondence and SARs produced.
4.	Deleting a tickler for a series letter cancels the event/subsequent series letter(s).
5.	Letters (excluding series letters) and SARs may be removed from the Print Queue.
6.	Series letters will not be contained in the Print Queue
7.	Series letters (tickler) scheduled for generation on the current day will be displayed along side of the print queue in a separate tab.
8.	Series letters (ticklers) displayed in the separate tab may only be canceled if an action is taken in Legacy such as Application received, Medical Report received, etc. If no action is taken that day, the series letters (tickler) will be included in the daily batch at the close of business.
9.	Create a batch (daily) list of queued letters to be viewed in CMSNet Web via a screen.
10.	Carbon Copies defined on the first letter are carried over to series letters generated automatically.
11.	Free text entered on 1st series letters carries over to the 2nd and/or 3rd letters.
12.	PDF files are saved to our server and each county is responsible for picking up the file from our server.
13.	The files are sent on a daily basis after the close of business (8:00p).
14.	Users may print immediately additional copies of documentation from the Web Correspondence Module.
15.	PDF specifications for new files are unchanged from our current specifications.
16.	System-generated case note is created for all letters per current specifications..
17.	System-generated case note is created when a letter is deleted.
18.	Provide a web report which captures history and future activity of the series letters. Users have to supply a date range.
19.	After the PDF file is created, it is the county's responsibility to manually remove any letters from the batch.
20.	All letters are sent to the print queue in CMSNet for creation of a batch.
21.	A print out (summary page) of letters printed from the queue is created with the batch. The following headers should be on the summary page: Date sent, Client's name, Letter description, CCS case#, Date of birth.
22.	Series letters are addressed to the primary addressee. Other correspondence such as Medical Reports are addressed to a specific vendor.

23.	Letters must have a status of Ready to Send or Sent to be included in the Print Queue.
24.	Sent letters that are initiated by the users through Web Correspondence will not be included in the daily batch file.
25.	Letters cannot be suppressed from the Print Queue once it has been transmitted to the county.
26.	Daily Print Queue/Batch retention to be maintain by the CMS Branch and will have indefinite retention.

2.2 ASSUMPTIONS

1) This SMCR uses the DHCS web design standards. This has the same “look and feel” of the CMS Net Web Correspondence system.

2) The terms ‘Client’ and ‘Patient’ are used synonymously in this SMCR.

3) The requirements and design are meant for CCS, although it may serve the same requirements for GHPP.

4) Any changes to the current correspondence shall be approved by policy prior to implementation.

5) User access the reports menu on the Report web.

6) Any printing and/or printer adjustments are handled by the county and tested with CMS Net support.

7) Any action that cancels or re-issues a letter remains unchanged.

8) Letter “Due Process” functionality (such as series letter) must remain unchanged.

9) Processing rules for letters that are generated as series remains unchanged (applications, medical reports, financial/residential letters).

10) Counties participating in the Print Queue are responsible for printing all documentation.

11) Users generate the first letter in the series.

12) Letter History is maintained in Legacy and through the Web Correspondence module.

13) Counties are responsible for suppressing/deleting letters prior to the transmission of the print queue.

14) Deleting a letter from the print queue deletes the letter.

15) Deleting a SAR letter from the print queue does not cancel, delete, or deny the SAR itself.

16) Users can update the print queue for only those letters generated in their office.

17) Printing rules for offices that do not participate in the automatic daily batch print process remain unchanged.

18) Effective the implementation date of the SMCR, all letters generated for new referrals are processed.

19) The 2nd and/or 3rd letter in a series is not generated for CCS/Medi-Cal or CCS/Healthy Families clients.

20) Authorized, SARs are included in the Print Queue along with their respective letters (C-51, C-50, C-73).

Test file(s) shall be transmitted prior to implementation.
Client detail information to be consistent across all the letters that varies currently

2.3 BUSINESS FLOW

2.3.1 Generating Correspondence

Manual correspondence generation remains unchanged. Correspondence is created in the CMS Legacy system and Web Correspondence. The limitation may be removed requiring that correspondence created in Legacy must be cancelled in Legacy. There are individual letters, series letters, SARs, and forms which are included in the print queue.

Users generate the first letter in the series. The 2nd and/or 3rd letter is generated for specific letter types through an automated method unless an event occurs which cancels the process such as a case closure, denial, receipt of a signed application, etc., and removes the next letter tickler.

A system-generated case note is created when any letter is generated, printed, deleted, etc., according to current rules for each letter type.

2.3.2 Generating SARs

The generation of SARs remains unchanged. SAR-only letters are included in the PDF file for transmission to the counties. Deleting a SAR letter does not cancel, delete, or deny the SAR.

2.3.3 Tracking Correspondence and SARs

Letter generation remains unchanged in the CMS Net system. Via the web, users may delete letters before transmission. Users can view and track letters sent and ready-to-send in the print queue.

3 FUNCTIONAL REQUIREMENTS

All processing rules for ticklers remain unchanged.

Letters created are stored in a queued and, after the close of business, generated into a batch PDF file for transmission. A report is created in the Web for tracking history and generation of the correspondence. A method is provided to delete letters or to remove them from the print queue.

The letter cancellation and re-issuance of letter functionality remains fundamentally unchanged.

Users use the remove (*X*) icon to remove letters from the print queue prior to transmission to the County.

3.1.1 File Creation

File is in PDF to be printed and sorted by Los Angeles County.

3.1.2 Series Letters

Add Appendix include table to letters from Excel.

Letter Series	Letter Number	Letter Title/Description
MED-RPT	C-13	Medical Report Request (05/1996)
MED-RPT	C-14	Medical Report Final Request
C16	C-16	Program Eligibility Interview letter #1
C16	C-16A	Program Eligibility Interview letter #2
C16	C-16B	Program Eligibility Interview letter #3
C16HF	C-16HF	Initial Program Eligibility Interview #1 Healthy Families
C16HF	C-16HFA	Initial Program Eligibility Interview #2 Healthy Families
C16HF	C-16HFB	Initial Program Eligibility Interview #3 Healthy Families
C16M	C-16M	Program Eligibility letter #1 Medi-Cal
C16M	C-16MA	Program Eligibility letter #2 Medi-Cal
C16M	C-16MB	Program Eligibility letter #3 Medi-Cal
C20	C-20	Transfer letter #1 - notified by Parent
C20	C-20A	Transfer letter #2 - notified by Parent
C20	C-20B	Transfer letter #3 NOA - notified by Parent
C21	C-21	Transfer letter #1 - change reported from other source
C21	C-21A	Transfer letter #2 - change reported from other source
C21	C-21B	Transfer letter #3 NOA - change reported from other source
C36	C-36	Application letter #1
C36	C-36A	Application letter #2
C36	C-36B	Application letter #3
C36HF	C-36HF	Application letter #1 Healthy Families
C36HF	C-36HFA	Application letter #2 Healthy Families

C36HF	C-36HFB	Application letter #3 Healthy Families
C36M	C-36M	Application letter #1 Medi-Cal
C36M	C-36MA	Application letter #2 Medi-Cal
C36M	C-36MB	Application letter #3 Medi-Cal
C36MTU	C-36MTU	Application letter #1 MTU
C36MTU	C-36MTU-A	Application letter #2 MTU
C36MTU	C-36MTU-B	Application letter #3 MTU
C38	C-38	Annual Prog Elig Review letter #1
C38	C-38A	Annual Prog Elig Review letter #2
C38	C-38B	Annual Prog Elig Review letter #3
C38HF	C-38HF	Annual Prog Elig Review letter #1 Healthy Families
C38HF	C-38HFA	Annual Prog Elig Review letter #2 Healthy Families
C38HF	C-38HFB	Annual Prog Elig Review letter #3 Healthy Families
C38M	C-38M	Annual Prog Elig Review letter #1 Medi-Cal
C38M	C-38MA	Annual Prog Elig Review letter #2 Medi-Cal
C38M	C-38MB	Annual Prog Elig Review letter #3 Medi-Cal
C40	C-40	Fee letter #1
C40	C-40A	Fee letter #2
C40	C-40B	Fee letter #3
MTU-MED	MTU-1	MTU Medical Report Request letter #1
MTU-MED	MTU-2	MTU Medical Report Request letter #2

3.1.3 Reports

Create a detailed report of documents included in the Print Queue.

Create a report users can see letter scheduled for future (Tickler).