

# **Letter Generation & Correspondence Enhancements**

*As of 12/12/12*

**System Maintenance Change Request  
(SMCR) 2529**

**Version 5.0**

## AMENDMENTS

Amendment #	Description	Date

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## **2 Introduction**

### **2.1 Purpose**

This SMCR is to remove the Pending Transfer letter generation process from CMS Net Legacy and to allow users to generate Pending Transfer series letters from the web correspondence module on CMS Net Web. And to fix IRs and defects related to web correspondence.

### **2.2 Scope**

The scope of this SMCR is to enhance the correspondence screen and to fix IRs related to web correspondence.

## **2.2.1 Main Web Correspondence screen**

**2.2.1.1 Add letter category (for example: LEA, Series, Transition)**

**2.2.1.2 Create letter requires category**

**2.2.1.3 Rename buttons to be “Search Letters”, “Create Letter”, “Back”**

**2.2.1.4 Rename quick reference buttons: Incomplete letters to Incomplete, Letters waiting for my approval to Waiting for my approval.**

**2.2.1.5 Add Quick Link to Medical Reports.**

**2.2.1.6 Display message if letter cannot be generated**

2.2.1.6.1 Message displays history and reason why letter cannot be generated

## **2.2.2 Edit Correspondence screen**

### **2.2.2.1 Transfer Pending Letter:**

2.2.2.1.1 Generate series letters for C-20 and C21.

2.2.2.1.2 Display the letter history and tickler date.

2.2.2.1.3 Display letter status, letter name, date printed, correspondence number, and next letter due.

2.2.2.1.4 Don't allow users to bypass the letter generation hierarchy.

2.2.2.1.5 To force send the second or next the letter, the previous has to be cancelled.

2.2.2.1.6 Ability to start new cycle by automatically cancelling the second letter and reissuing the first letter if there is no tickler.

2.2.2.1.7 Allow the user to modify New Primary Addressee information and county.

2.2.2.1.8 Auto populates the Current Primary Addressee information.

2.2.2.1.9 Add phone four digit extensions.

2.2.2.1.10 Add four digit zip code extensions on both Current and New Primary Addressee.

2.2.2.1.11 Remove the status field which indicates Transfer/Active.

2.2.2.1.12 Filter letters from Correspondence dropdown to list only series letters which are tickled.

### **2.2.2.2 Medical Report Request Letter:**

2.2.2.2.1 Request Type: 3 letters types C-13 (MED REPORT REQUEST), C-17 (ROI REQUEST), and MTU-1 (MTU REQUEST).

2.2.2.2.2 Medical Record # entry is optional. If present in Patient Registration, auto populate in letter.

2.2.2.2.3 Reason Requested is required.

2.2.2.2.4 Add provider using the Addressed To for letters types C-13 (MED REPORT REQUEST), C-17 (ROI REQUEST), and MTU-1 (MTU REQUEST).

2.2.2.2.5 Display the letter history and tickler date.

2.2.2.2.6 Display letter status, letter name, date printed, correspondence number, and next letter due.

2.2.2.2.7 Don't allow users to bypass the letter generation hierarchy.

2.2.2.2.8 To force send the second or next the letter, the previous has to be cancelled.

2.2.2.2.9 Ability to start new cycle by automatically cancelling the second letter and reissuing the first letter if there is no tickler.

2.2.2.2.10 Display status of letter received on the Correspondence Description hyperlink.

### **2.2.2.3 Unsolicited Report Letter:**

2.2.2.3.1 User may enter unsolicited report.

2.2.2.3.2 Ability to add: Medical Record #, Report Received Date, and Received From.

## **2.2.3 View Correspondence Screen**

### **2.2.3.1 Medical Report Received**

- 2.2.3.1.1 From the Correspondence Search Results - Correspondence Description: a user may select the medical report letter hyperlink to go directly to the Correspondence view page where user may enter medical report has been received.
- 2.2.3.1.2 From the “View Correspondence” screen: a user may select an existing report from the Correspondence Search Results - Correspondence Description to enter Medical Report Request Status as: Patient not seen, No report received, Report received.
- 2.2.3.1.3 Report received field: when entered, the “Report Received Date” and “Case Review In Months” are required.
- 2.2.3.1.4 Case Review In Months field: user may select 12 mths, 3 mths, 6 mths, 9 mths, or NONE.
- 2.2.3.1.5 MEDICAL REPORT REQ/REC HISTORY screen: Remove from legacy. User may see the information received from the Correspondence module.
- 2.2.3.1.6 Ability to undo/delete medical report received information.

## 2.2.4 View Correspondence Screen

### 2.2.4.1 CR 2337 – Correspondence/Provider Registration: Allow multiple correspondence addresses to be added to a provider's record.

- 2.2.4.1.1 Legacy and web: if more than one address is found on search results, display all providers’ addresses (service and correspondences) for user to select.
- 2.2.4.1.2 Convert S2 (street 2) as required to be on S1 (street 1)
- 2.2.4.1.3 S1 required and S2 optional
- 2.2.4.1.4 Add attention line as optional.

### 2.2.4.2 Enhancement Description: Add the ability to add CC without having to reissue the letter. Add a new button called 'Add CC'. Exception C-50, C-51, and C-73.

### 2.2.4.3 Correspondence – Client not retain if “Corresp Description” link is used to view client. System should retain selected client.

- 2.2.4.4 **Correspondence - Refresh the stored variables for the addressee information on correspondence when there's an update to addressee info.**
- 2.2.4.5 **Empty addressee record should not be selectable**
- 2.2.4.6 **Print Queue button: Remove this functionality, it has been replaced Print All.**
- 2.2.4.7 **Application Status (Reason no action): Change 'Reason no action' free text field to table for selecting valid reasons for 'No Action' and identify reason. Create a table with valid reasons for 'No Action'**

## Definitions, Acronyms, & Abbreviations

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

**Table 2-1, 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

### 3 Overall Description

#### 3.1 Business Rules:

**3.1.1 The case status in Patient Registration will not change to Transfer/Active when the letter is generated.**

#### 3.2 Assumptions and dependencies

**3.2.1 Business rules defined in Legacy will be applied to the web.**

**3.2.2 All development will follow the coding standards as defined in the CMS Coding Standards Document.**

**3.2.3 Apply all standard Web Correspondence functional rules to this module.**

**3.2.4 Set up ticklers and generate case note.**

**3.2.5 Batch Correspondence will continue to function as it is today.**

**3.2.6 A user may only generate a Pending Transfer letter for those clients in their legal county.**

**3.2.7 Apply the same carbon copy rules as it currently does today.**

**3.2.8 MEDICAL REPORT REQ/REC HISTORY screen: Remove from legacy. It will not be replaced on the web. User may see the information received from the Additional Information section within Web Registration or search results from Correspondence module.**

## **4 Functional Requirements**

### **4.1 PROCESSING RULES**

**4.1.1 Current processing rules will apply.**

### **4.2 Functionality**

**4.2.1 Study Scope.**

## **5 Appendices**

### **5.1 Appendix A**

### **5.2 Appendix B**