

WEB CORRESPONDENCE
System Requirements Specifications

Revision 7
As of 04/13/2008

System Maintenance Change Request
SMCR 642
(SMCR200606-642)

DISCLAIMER: This document is not a user manual and is being provided here as an informational courtesy for the system users as early as possible. The documentation is intended for the developers only and is subject to change at any time. The final product may change for design improvements and the final system user instructions will be posted with the manual updates.

All questions and comments should be sent via email to CMSHelp@dhcs.ca.gov.

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DRAFT

1 INTRODUCTION

1.1 PURPOSE

The purpose of this SMCR is to convert the current CMS Net Legacy Correspondence module and existing features and functionalities to the CMS Net Web System. The conversion has a method to track all generated and cancelled letters. It integrates Sacramento County's NOA/NORA feature which requires approval of NOA/NORAS before they can be sent or printed.

1.2 SCOPE

The scope of this SMCR is to:

1. Access from the CMS Net Web System
2. Make this available on the Internet Explorer browser
3. Allow users to send new free text letters
4. Allow edits and cancellations of letters
5. Create a method to track all generated and cancelled letters
6. Allow letters to be reprinted including all SAR letters on the Web Correspondence module
7. Generate auto-case notes (without users' visual knowledge) of generated or cancelled letters
8. Allow users to generate letters throughout the CMS Net web system after specific actions for future modules including auto-generated letters.
9. Integrate method of approving letters involving the use of CMS Web Messages
10. Allow generated letters to be sent via Web messages
11. Create method to assign 'Approvers'
12. Create method to identify which letters require approval [scope limited]
13. Allow letters to be searched by letter type, date printed, patient, and user
14. Integrate the 'Print Correspondence' module from CMS Net Legacy into Web Correspondence and rename it to 'Print Manual Batch Letters'
15. Add a method to identify which letters require approval in CMS Net Legacy
16. Create a notification message before each letter is generate in CMS Net Legacy to indicate that the letter requires approval before it can be sent
17. Possibly create a report based on Web Correspondence fields including the approval process.
18. Add a new field to capture the date of when the letter was printed (sent) in Legacy.
19. Simplify search method using text boxes and <Enter> key

20. Convert all generated Legacy letters to the web
21. Convert all Legacy letter templates to the web so letters can be generated from Web Correspondence
22. On the SAR cancellation and denial process, remove the Correspondence radio buttons 'NOA' and 'Letter'. The selection is driven by the denial reasons. NOAs to be used for all reason except for when the "...provider has cancelled / terminated services". The remaining reason will generate the only denial letter.
23. Need to have the SAR application correctly match the 'Reason for Cancellation' drop down list match with the 'Citation' drop down list.
24. MC 2134 letter will not be included. It is already included as a part of the NOAs for SAR and case management.

1.3 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

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

Table 1-1, Definitions, Abbreviations and Acronyms

Term	Definition
CCS	California Children's Services
CIN	Client Index Number
CMS Net	Children's Medical Services Network
DHS	Department of Health Care Services
SAR	Service Authorization Request
SMCR	System Maintenance Change Request
MTU	Medical Therapy Unit
MEDS	Medi-Cal Eligibility Data System
NOA/NORA	Notice of Action / Notice of Referral Action

1.4 OVERVIEW

The objective is to create a new Web Correspondence module on the CMS Net web system where correspondences can be sent, edited, tracked, cancelled, and printed. The new module includes the letter approval feature (NOA/NORA feature) used in Sacramento County CCS. This project converts existing Legacy correspondence to the web including that of Sacramento County.

All correspondence generated in either CMS Net Legacy or Web system can be edited and reprinted only in the new Web Correspondence module.

The process of generating NOAs and denial letters changes to two NOAs and one denial letter. The new Family Voices version of the NOA and denial letters is used.

2 OVERALL DESCRIPTION

2.1 ASSUMPTIONS AND DEPENDENCIES

1. This SCMR uses the DHS web design standards
2. This has the same “look and feel” of the SAR system
3. Create the option to print from the web
4. Save the existing or most recent patient identification until the session has expired or when the user chooses a different patient to work on. This allows the user to navigate through different modules or menus without having to perform a new search for that same patient. This feature should be similar to CMS Net Legacy.
5. The terms ‘Client’ and ‘Patient’ are used synonymously for this SMCR.
6. Fields that are based on a table or pick list in Legacy convert to the web with their values still based on the same table or pick list.
7. The Client Information Header used in this documentation is not accompanied by a data dictionary because it has already been developed and properties have been defined.
8. The requirements and design are meant for CCS, although it should serve the same requirements for GHPP.
9. All letter templates and formats are maintained by State System Administrators. Family Voices letters are included.
10. Ticklers and automatic batch correspondence are not affected
11. The new Courtesy Copy format applies to all letters.
12. ~~Letters in a series such as Application and Pending Eligibility letters are not included in this module~~
13. Batch correspondence feature is not included in this SMCR, but to be added someday
14. The functionality rules for canceling, editing, and sending letter types in CMS Net Legacy also apply to the letters in Web Correspondence.
15. The ability to view letters remains the same as in CMS Net Legacy – users may view all letters of patients only in their legal county. The rule applies to Regional Office users as well. State administrators may view letters for all patients.
16. The display history of letters in a series will not be affected and still display on the respective Legacy screens.

3 FUNCTIONAL REQUIREMENTS

3.1 REMOVE LEGACY CORRESPONDENCE OPTIONS

Correspondences and letters can be issued (generated) in the CMS Legacy system; however, any reprints or edits using the 'Correspondence' option have to be done using the Web Correspondence module. The 'Correspondence' option is removed from the 'Event Tracking' menu option as displayed in Figure 3-1. In addition, the 'Print Correspondence' option is removed. It is replaced on the Web Correspondence module menu bar by 'Print by Location'. The FileMan Menu or Key Management utilities can be used to remove the menu options from all users.

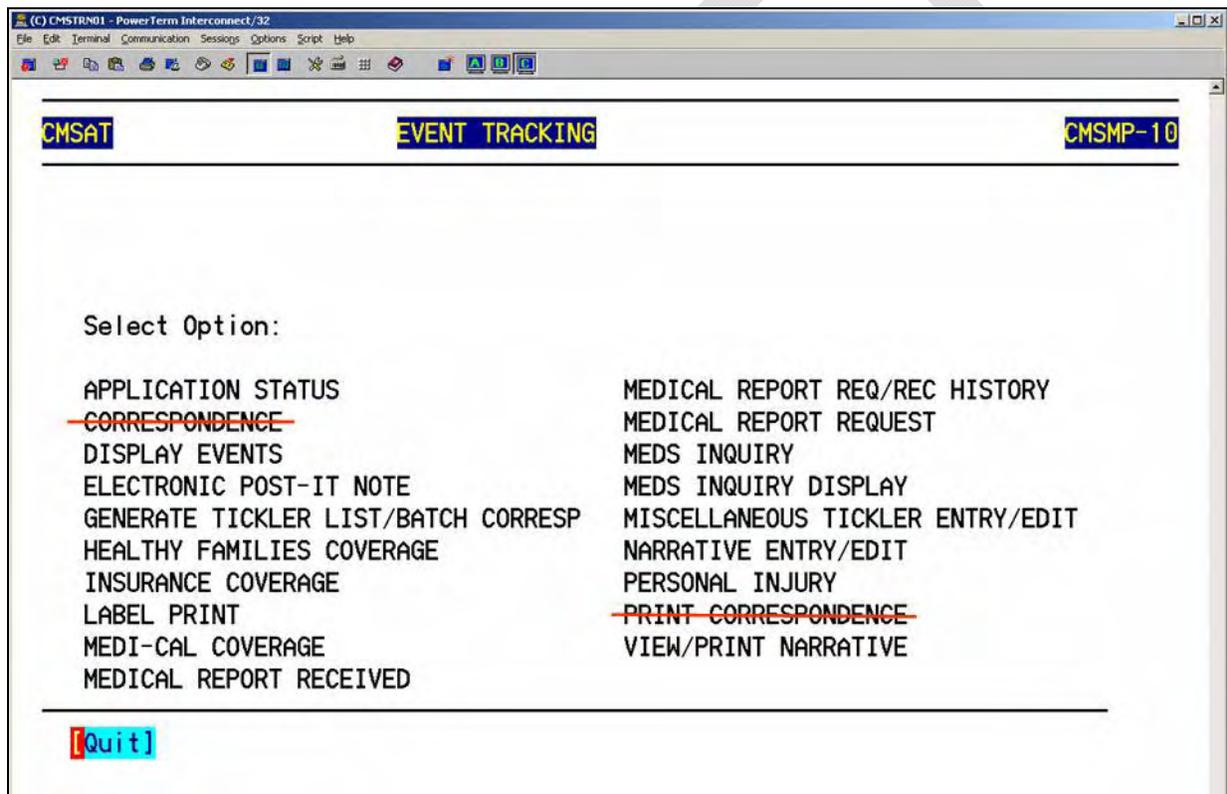


Figure 3-1, Remove Legacy Correspondence Menu Options

3.2 ACCESSING WEB CORRESPONDENCE

The Web Correspondence module can be accessed from several areas. It can be accessed from the CMS Net Web Homepage or using the 'View My:' drop down list as displayed in Figure 3-2.



Figure 3-2, CMS Net Web Homepage

The Web Correspondence module can also be accessed from the CCS Modules drop down list located on the system menu bar as pictured in Figure 3-3.



Figure 3-3, Accessing Web Correspondence

The Web Correspondence menu bar has three options: Search Letter, Send Free Text Correspondence, and Batch Correspondence.

The 'Search Letter' option is used to search for correspondence. The 'Send Free Text Correspondence' option is used to manually send a free text correspondence. The 'Batch Correspondence' is used for batch correspondence functionalities which are not included in this SMCR.

3.3 SEARCH LETTERS

The search letters screen is the default screen when accessing the Web Correspondence module. Search criteria can consist of county, patient, user, correspondence type, or correspondence status. 'Begin Date' and 'End Date' are required. Figure 3-4 is the display of the search screen.

CORRESPONDENCE

Search Correspondence |
 Send Free Text Correspondence |
 Batch Correspondence

CORRESPONDENCE

Required Fields are marked in *

SEARCH OPTIONS

Begin Date:* |
 End Date:*

County or Region:

Local Office:

Select Patient

<input type="checkbox"/>	Patient Name	CCS#	CIN	SSN	DOB	Gender	County	
<input type="checkbox"/>	Libre, Nacho	4027930	35991451A 9	987-65-5712	01/01/2000	Male	Sacramento	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Munky, Drunkn Curious	3857064	37270171A 9	123-55-7704	01/01/2006	Male	Sacramento	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Prime, Optimus	2078687	37951451B 6	900-65-7412	06/01/2007	Male	Riverside	<input type="checkbox"/>

Select User

<input type="checkbox"/>	User Name	User County	Unique Id	User Status	
<input type="checkbox"/>	Surrogate MSN, User	Sacramento	B9874	Active	<input type="checkbox"/>
<input type="checkbox"/>	Monday PHN, User	Butte	A6827	Inactive	<input type="checkbox"/>

Select Correspondence

<input type="checkbox"/>	Corresp Type	Correspondence Description	
<input type="checkbox"/>	NOA	Notice of Action	<input type="checkbox"/>
<input type="checkbox"/>	PSA-CORR	Program Services Agreement (Spanish) - Correspondence Screen	<input type="checkbox"/>

Include the following correspondence status:

<input checked="" type="checkbox"/> Incomplete	<input checked="" type="checkbox"/> Not yet printed	<input checked="" type="checkbox"/> Submit for Approval
<input checked="" type="checkbox"/> Cancelled	<input checked="" type="checkbox"/> Previously printed	<input checked="" type="checkbox"/> Approved
<input checked="" type="checkbox"/> Reissued		<input checked="" type="checkbox"/> Deny Approval

Figure 3-4, Search Existing Letters

The records in the patient and user list are cached throughout the CMS Net modules. So the same patient and user records used in Case Notes module appear in the Web Correspondence module.

Business rules for correspondence search screen:

1. The rules for users' access to view correspondence in Legacy are the same for Web Correspondence. The rule is users cannot view any correspondence of a patient that is not in their legal county or region.
2. On the patient and user list, the search column fields are static so if the user scrolls down the list, the search fields remain at the top.
3. Date range defaults to the past 30 days.
4. County or Region defaults to the user's legal county or regional office which lists the associated dependent counties. Using just this field and the date range, the system searches for all letters of patients within the selected county or region. It is a very generic search option.
5. Local office option is contingent on the selection of specific legal counties. Listed is the relationship between the legal county and available local office:

Table 3-2, Local office and legal county relationship

Local Office values	Legal County selected
• Willows	• Glenn
• Orland	• Glenn
• Mendocino	• Mendocino
• Willits	• Mendocino
• El Dorado – S. Lake Tahoe	• El Dorado
• El Dorado – Placerville	• El Dorado

This list is for informational purposes only. Application uses of the local office table.

4. **Select patient list**
 - Re-use the same client search fields used in the SAR module. The same rules apply. Press <Enter> to execute the client search based on the search criteria. Only patients with the same legal county can be used in the search criteria. This does not mean patients from different counties cannot be listed on the patient list.
 - If a unique (or exactly one) patient is found, populate the patient on the top of the patient list. The system automatically selects the patient to be in the search criteria by using the checkbox. If not matching records are found based on either of the unique search criteria, an alert box appears: "No matching records found".
 - If multiple patients are found, display the results on the pop-up screen. Re-use the same patient results screen and selection processes used in the Case Notes module, but only have one button called "Done". Selected patients are added to the top of the patient list. The system automatically selects the patient to be in the search criteria by using the checkbox.
 - Patients can be removed by using the 'X' (delete) icon to the far-right of the patient list. The system confirms removal with a dialog box: "Do you want to remove [Patient Name] from patient list?" Click 'Yes' or 'No'.

5. **Select user list**

- A user search criterion consists of the following: partial name, users' county, unique ID, or status. Press <Enter> to execute the user search based on the search criteria.

- If a unique Id is used and if the user record is found, the system populates the user to the top of the user list. The system automatically selects the patient to be in the search criteria by using the checkbox.

- If multiple users are found, display the results on the pop-up screen. Re-use the same user results screen and selection processes used in the Case Notes module, but only have one button called "Done". Selected users are added to the top of the users list. The system selects the user to be in the search criteria by using the checkbox.

- User can be removed by using the 'X' (delete) icon to the far-right of the users list. The system confirms removal with a dialog box: "Do you want to remove [User Name] from user list?" Click 'Yes' or 'No'.

6. **Select correspondence list**

- Click the 'Select Correspondence' button to display a pop-up screen of all the available correspondence.

- Select the correspondence type then click the 'Done' button. The selected correspondence is added to the top of the correspondence list. The system selects the correspondence(s) to be in the search criteria by using the checkbox.

- Correspondence can be removed by using the 'X' icon to the far-right of the correspondence list.

7. **Select correspondence status**

- By default, the system marks all the correspondence statuses when the user first opens the correspondence search screen. Thereafter, the system remembers the previously selected settings

3.3.1 Search Correspondence Screen Data Dictionary

Table 3-3, Search Correspondence Data Dictionary

Obj #	Field Name	Length Type Format	Required?	Description/Comments
1.	Begin Date	10 Date	Required	Defaults to today minus 30 days the first time a search is done during a session. Automatically changed to be the same as End Date whenever End Date is set to date earlier than the selected Begin Date. Used to search when a letter was issued. This date can be modified.
2.	End Date	10 Date	Required	Defaults to today's date the first time a search is done during a session. Used to search when a letter was issued This date can be modified.
3.	County or Region	17 Alpha Numeric Drop-down list	No	Defaults to the user's county or region. If the user is from a regional office the drop-down list displays all the associated dependent counties.
4.	Local Office	60 Alpha Numeric Drop-down list	No	Values populate from dictionary for the legal county selected. (See Table 3-2 for examples.)
5.	Patient Name	30 Alpha Numeric Text box	No	Type in a patient name to search. Partial name is allowed. Press <Enter> to execute the search.
6.	CCS#	7 Alpha Numeric Text box	No	Type in a patient CCS number to search. Press <Enter> to execute the search.
7.	CIN	11 Alpha Numeric Text box	No	Type in a patient CIN number to search. Press <Enter> to execute the search.

8.	SSN	11 Alpha Numeric Text box	No	Type in a patient social security number to search. Press <Enter> to execute the search.
9.	DOB	10 Date 99/99/9999	No	Type in a patient date of birth number to search. Must be used in combination with 'County'. Press <Enter> to execute the search.
10.	Gender	1 Alpha Drop-down list	No	Select 'Male' or 'Female' on the drop down.
11.	User Name	30 Alpha Numeric Text box	No	Enter the name of the user then press <Enter> to display the user name. Displays the name of the selected user.
12.	County	17 Alpha Drop-down list	No	Select patient's county using the drop-down list.
13.	Unique ID	5 Alpha Numeric Text box	No	Type in the user's CMS unique ID (not internal IEN)
14.	Active Status	8 Alpha Drop-down list	No	Select users status: Values: 1. Active 2. Inactive
15.	Letter Type	12 Alpha Numeric Text	Display Only	Use the drop down list to select the letter type to be used in the search criteria. Values are listed and Spanish version are automatically included when selected: 1. C-13 MEDICAL REPORT REQUEST 5/96 2. C-13A MED RPT REQ FROM DEP CO 5/96 3. C-14 MEDICAL REPORT FINAL REQUEST 4. C-17 MED RPT REQ-ROI COVER LETTER-DEP CO. 5. C-17A PROVIDER RELEASE OF INFORM - DEP CO

				6. C-17AI RELEASE OF INFO - IND CO FORM 7. C-20 TRANSFER LTR # - NOTIFIED BY PARENT 8. C-20A TRANSFER LTR #2 - NOTIFIED BY PARENT 9. C-20B TRANSFER LTR, NOA - NOTIFIED BY PARENT 10. C-21 TFR LTR #1-CHG REPORTED FROM OTHER SOURCE 11. C-21A TFR LTR #2-CHG REPORTED FROM OTHER SOURCE 12. C-21B TFR LTR #3-NOA-CHG RECD FROM OTHER SOURCE 13. C-40 FEE LETTER #2 14. C-40A FEE LETTER #3 15. C-40B FEE LETTER #4 16. C-50 FAMILY DX COVER LETTER 17. C-51 FAMILY TX/THERAPY AUTH COVER LETTER 18. C-71 CANCEL AUTHORIZATION LETTER 19. C-72 DENY REQUEST FOR SERVICE 20. C-73 AUTHORIZATION COVER LETTER-DISTRIBUTION 21. CCS-17 MED RPT REQ-ROI COVER LETTER-DEP CO. 22. CCS-17A PROVIDER RELEASE OF INFORMATION FORM 23. CCS-72 DENY REQUEST (AUTO) 7/95 24. CO-FREE1 FREE TEXT LTR FM CO TO VENDOR 25. CO-FREE2 FREE TEXT LTR FM CO TO FAMILY 26. DHS 4027 CCS Consent for MTP Services 27. HF STATEMENT HEALTHY FAMILIES STATMNT OF ANNUAL INCOME 28. LEA-1 INC. REF FORM FROM LEA/SELPA 29. LEA-2 LEA NOTIFICATION OF MED THERAPY PGM STATUS 30. LEA-3 LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES 31. LEA-4 MEDICAL ELIG ASSESSMENT PLAN
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				32. LEA-5 UNDETERMINED STATUS NOTIFICATION 33. LEA-6 MEDICAL ELIGIBILITY NOTIFICATION 34. LEA-7 MED. THERAPY CONF. APPT. NOTICE 35. MC 2134 CCS VENDOR CLOSURE LETTER 1/97 36. MC 2600 CCS HEALTH INSURANCE INFORMATION FORM 37. MTU-1 MTU MED RPT REQ LTR #2 38. MTU-2 MTU MED RPT REQ #3 39. NOA NOA 40. NOA-DEP CO NOTICE OF ACTION - DEPENDENT COUNTY 41. NPP NOTICE OF PRIVACY PRACTICES (NPP) - HIPAA 42. PSA PROGRAM SERVICES AGREEMENT 43. PSA-CORR PROGRAM SERVICES AGREEMENT (CORRESP) 44. RO-FREE1 FREE TEXT LTR FM RO TO VENDOR 45. RO-FREE2 FREE TEXT LTR FM RO TO FAMILY
16.	Letter Description	60 Alpha Numeric Text	Display Only	Use the drop down list to select the letter type to be used in the search criteria. Values are listed and Spanish version are automatically included when selected: 1. C-13 MEDICAL REPORT REQUEST 5/96 2. C-13A MED RPT REQ FROM DEP CO 5/96 3. C-14 MEDICAL REPORT FINAL REQUEST 4. C-17 MED RPT REQ-ROI COVER LETTER-DEP CO. 5. C-17A PROVIDER RELEASE OF INFORM - DEP CO 6. C-17AI RELEASE OF INFO - IND CO FORM 7. C-20 TRANSFER LTR # - NOTIFIED BY PARENT 8. C-20A TRANSFER LTR #2 - NOTIFIED BY PARENT 9. C-20B TRANSFER LTR, NOA - NOTIFIED BY PARENT 10. C-21 TFR LTR #1-CHG REPORTED FROM OTHER SOURCE

				11. C-21A TFR LTR #2-CHG REPORTED FROM OTHER SOURCE 12. C-21B TFR LTR #3-NOA-CHG RECD FROM OTHER SOURCE 13. C-40 FEE LETTER #2 14. C-40A FEE LETTER #3 15. C-40B FEE LETTER #4 16. C-50 FAMILY DX COVER LETTER 17. C-51 FAMILY TX/THERAPY AUTH COVER LETTER 18. C-71 CANCEL AUTHORIZATION LETTER 19. C-72 DENY REQUEST FOR SERVICE 20. C-73 AUTHORIZATION COVER LETTER-DISTRIBUTION 21. CCS-17 MED RPT REQ-ROI COVER LETTER-DEP CO. 22. CCS-17A PROVIDER RELEASE OF INFORMATION FORM 23. CCS-72 DENY REQUEST (AUTO) 7/95 24. CO-FREE1 FREE TEXT LTR FM CO TO VENDOR 25. CO-FREE2 FREE TEXT LTR FM CO TO FAMILY 26. DHS 4027 CCS Consent for MTP Services 27. HF STATEMENT HEALTHY FAMILIES STATMNT OF ANNUAL INCOME 28. LEA-1 INC. REF FORM FROM LEA/SELPA 29. LEA-2 LEA NOTIFICATION OF MED THERAPY PGM STATUS 30. LEA-3 LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES 31. LEA-4 MEDICAL ELIG ASSESSMENT PLAN 32. LEA-5 UNDETERMINED STATUS NOTIFICATION 33. LEA-6 MEDICAL ELIGIBILITY NOTIFICATION 34. LEA-7 MED. THERAPY CONF. APPT. NOTICE 35. MC 2134 CCS VENDOR CLOSURE LETTER 1/97 36. MC 2600 CCS HEALTH INSURANCE INFORMATION FORM
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				37. MTU-1 MTU MED RPT REQ LTR #2 38. MTU-2 MTU MED RPT REQ #3 39. NOA NOA 40. NOA-DEP CO NOTICE OF ACTION - DEPENDENT COUNTY 41. NPP NOTICE OF PRIVACY PRACTICES (NPP) - HIPAA 42. PSA PROGRAM SERVICES AGREEMENT 43. PSA-CORR PROGRAM SERVICES AGREEMENT (CORRESP) 44. RO-FREE1 FREE TEXT LTR FM RO TO VENDOR 45. RO-FREE2 FREE TEXT LTR FM RO TO FAMILY
17.	Select Correspondence	1 Control Object Button	No	Click to display the all the available letters on a pop-up screen.
18.	Delete (x)	1 Control Object Button	No	Used to delete the selected items from patient, user, or correspondence list.
19.	Search	1 Control Object Button	Yes	Click 'Search' to find matching results based on the search criteria.
20.	Clear	1 Control Object Button	No	Click 'Clear' to unmark all checkboxes. The system does not remove any objects such as patient, user, or correspondence. Users can use the 'X' (delete) icon instead.

3.4 VIEW EXISTING LETTERS

Figure 3-5 is an example of the search results based on the search criteria in Figure 3-4. Where there is only one patient selected for the search, the system displays the 'Client Information' header. The header is static on the screen.

CORRESPONDENCE

[Search Correspondence](#) | [Send Free Text Correspondence](#) | [Batch Correspondence](#)

CORRESPONDENCE

CLIENT INFORMATION

Client Name: DRUNKN CURIOUS MUNKY	Fin Elig Status: ELIGIBLE	Reg Status: ACTIVE
Alias: MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY	Res Elig Status: ELIGIBLE	Application Status: NO ACTION
CCS Number: 3857064	Med Elig Status: ELIGIBLE	PSA Status: SIGNED
DOB: 01/01/2006	Diagnostic Only: YES	Program Begin Date: 07/26/2006
CI#: 34240141A9	CCS Elig Status: 9K CCS	Program End Date: 07/25/2007
Gender: MALE		
County: SACRAMENTO		

Client Information Header remains static

Client Information Header appears if only one patient is queried

Select Correspondence

<input type="checkbox"/> Select All	Issued Dt ▼	Corresp Type ▼	Correspondence Description ▼	Corresp # ▼	Print Dt ▼	Sent To: ▼	Address ▼	Issued By ▼	Status ▼
<input type="checkbox"/>	10/15/2007	C-36HF	Application Ltr—Healthy Fam #1	2007-268498	10/15/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	
<input type="checkbox"/>	11/10/2007	NOA	Notice of Action Spanish	2007-268497		Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Paul, Yolonda	
<input type="checkbox"/>	07/30/2007	PSA-CORR	Program Services Agreement (Spanish) - Correspondence Screen	2007-268394	07/30/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Washington, Brenda	
<input type="checkbox"/>	09/13/2007	C-71	Cancel Authorization Correspondence Spanish	2007-268334	09/13/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Whitaker, LaVorra	
<input type="checkbox"/>	09/10/2007	C-73	Authorization Cover Correspondence—Distribution Spanish	2007-268311	09/10/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Whitaker, LaVorra	
<input checked="" type="checkbox"/>	10/01/2007	NOA	Notice of Action Spanish	2007-267960	10/01/2007	Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Rundall, Julie	
<input type="checkbox"/>	12/08/2007	C-72	Deny Request for Service Spanish	2007-267959		Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Paul, Yolonda	

Found 1-7 out of 45 Matching Records

Print
Attach
Back

Next 25 Records >>

Figure 3-5, View Existing Letters

All correspondence that matches the search criteria will appear on this list. This includes all letters generated in the Legacy and the SAR system. *Keep in mind, not all issued letters are printed the moment they're issued.* Some are printed using batch correspondence. Some users like to print all their correspondence at one at a later time.

There are three buttons that can be used on this screen: Print, Attach, and Back. Multiple letters can be printed or attached by using the 'Select' checkboxes then clicking the appropriate button – Print or Attach. The 'Back' button returns to the search screen with the previous search criteria.

The system does not print letters that have either status: Incomplete, Submit for Approval or Deny Approval. A dialog box appears: "The selected letter(s) cannot be printed".

Each time a letter is generated, reissued, or cancelled, the system creates an automatic case note detailing the event that include the letter type, date of occurrence, and who performed it.

Letters can be viewed individually by clicking on the 'Letter Description' hyperlink. A pop-up screen displays a .PDF format of the letter.

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Figure 3-6 displays search results with search criteria for more than one patient. Notice, there is no 'Client Information' header and there are two new column fields in the list: CCS# and Client Name. All functionalities and buttons remain the same as in Figure 3-5.

CORRESPONDENCE

Search Correspondence | Send Free Text Correspondence | Print By Location | Batch Correspon-

Select Correspondence

<input type="checkbox"/> Select All	CCS # ▼	Client Name ▼	Issued Dt ▼	Corresp Type ▼	Correspondence Description ▼	Corresp # ▼	Printed Dt ▼	Sent To ▼	Address ▼	Issued By ▼	Status ▼
<input type="checkbox"/>	3857064	Munky, Drunkn	10/15/2007	NOA	<u>Notice of Action Spanish</u>	2007-268498	10/15/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	
<input type="checkbox"/>	3857064	Munky, Drunkn	11/10/2007	C-36HF	<u>Application Ltr—Healthy Fam #1</u>	2007-268497	11/10/2007	Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Paul, Yolonda	
<input type="checkbox"/>	3888101	Libre, Nacho	07/30/2007	PSA-CORR	<u>Program Services Agreement (Spanish) - Correspondence Screen</u>	2007-268394	07/30/2007	Mom Libre	8888 Freeway Blvd. #50 Sacramento, CA 95899	Washington, Brenda	
<input type="checkbox"/>	3888101	Libre, Nacho	09/13/2007	C-71	<u>Cancel Authorization Correspondence Spanish</u>	2007-268334	09/13/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Whitaker, LaVorra	
<input type="checkbox"/>	4000009	Prime, Optimus	09/10/2007	C-73	<u>Authorization Cover Correspondence—Distribution Spanish</u>	2007-268311	09/10/2007	Mom Prime	8888 Freeway Blvd. #50 Sacramento, CA 95899	Whitaker, LaVorra	
<input type="checkbox"/>	4000009	Prime, Optimus	11/10/2007	NOA	<u>Notice of Action Spanish</u>	2007-267980	11/10/2007	Mom Prime	8888 Freeway Blvd. #201 Sacramento, CA 95899	Paul, Yolonda	
<input type="checkbox"/>	T487429	Megatron, Omega	12/08/2007	C-72	<u>Deny Request for Service Spanish</u>	2007-267959	12/08/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Paul, Yolonda	

Found 1-7 out of 45 Matching Records

Figure 3-6, Search Results with Multiple Patients

3.4.1 View Existing Correspondence Data Dictionary

Table 3-4, View Existing Correspondence Figure 3.3 and 3.4 Data Dictionary

Obj #	Field Name	Length Type Format	Required?	Description/Comments
1.	Select All	1 Control Object Checkbox	Yes	Click on the 'Select All' checkbox to select all the letters displayed on the current list.
2.	Select	1 Control Object Check box	Yes	Click on the 'Select' checkbox to select individual or multiple letters on the list. Multiple selects can be used with the 'Print' and 'Attach' button.
3.	CCS#	7 Alpha Numeric	Display Only	Displays the client CCS number. Displays when the search criteria involve more than one client.
4.	Client Name	30 Alpha Numeric Text	Display Only	Displays the client name. Displays when the search criteria involve more than one client.
5.	Issued Dt	10 Date 99/99/9999	Display Only	Displays the date of when the letter was issued (generated).
6.	Letter #	20 Alpha Numeric Text	Display Only	Displays the letter number (letter type) that corresponds to the type of letter sent. Each letter type has a unique number to identify it. See Table 3.3 to view all the acceptable values.
7.	Letter Description	1 Alpha Numeric Hyperlink	Display Only	Hyperlink used to display the letter. Displays the letter name that that corresponds to the type of letter sent. See Table 3.3 to view all the acceptable values.
8.	Corresp #	15 Numeric 9999-999999	Display Only	Displays the correspondence number. Auto-number used to identify each correspondence generated.

9.	Sent / Print Date	10 Date 99/99/9999	Display Only	Displays the date of when the letter was first sent / printed.
10.	Sent To	30 Alpha Numeric Text	Display Only	Displays the name of the person or addressee receiving the letter. This person could be patient, primary addresses, provider, vendor, or other.
11.	Address	70 Alpha Numeric Text	Display Only	Displays the street address, city, state and zip of the addressee.
12.	Issued By (Sender)	30 Alpha Numeric Text	Display Only	Displays the name of the user who generated the letter.
13.	Status	9 Alpha Text	Display Only	Displays the status of the correspondence. Values: <ol style="list-style-type: none"> 1. <Blank>. Correspondence has not been modified. 2. Incomplete - Correspondence generated from the Legacy are incomplete initially then are completed, saved, and printed using Web Correspondence. 3. Cancelled - Correspondence has been cancelled. A <i>Cancelled</i> message displays across the letter. -Also displays the name of the user that cancelled the letter and date 4. Reissued - Correspondence has been reissued. -Also displays the new correspondence number that replaced it 5. Submit for Approval – Correspondence requires approval and has been a request to approve the letter has been submitted to the designated Approver. Correspondences with this status cannot be printed or attached. 6. Deny Approval – The Approver has denied the pending letter. Correspondences with this status cannot be printed or attached. 7. Approved – Displays after the pending letter has been approved.
14.	Print	1 Control Object Button	No	Allows multiple letters to be printed when the 'Print' button is clicked. Letters that require approval cannot be printed until approved. Or if the letter

				status is: Submit for Approval or Deny Approval. An error message displays.
15.	Attach	1 Control Object Button	No	Allows multiple letters to be attached to Web message when the 'Attach' button is clicked.
16.	Back	1 Control Object Button	No	Click the 'Back' button to return to the search screen with the previous search criteria values.

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3.5 PRINT DISPLAY OF CORRESPONDENCE

An existing correspondence can be viewed and printed by clicking the 'Print' button. Figure 3-7 is an example of correspondence that can be printed in a .PDF format using the 'File' and 'Print' option on the menu bar.

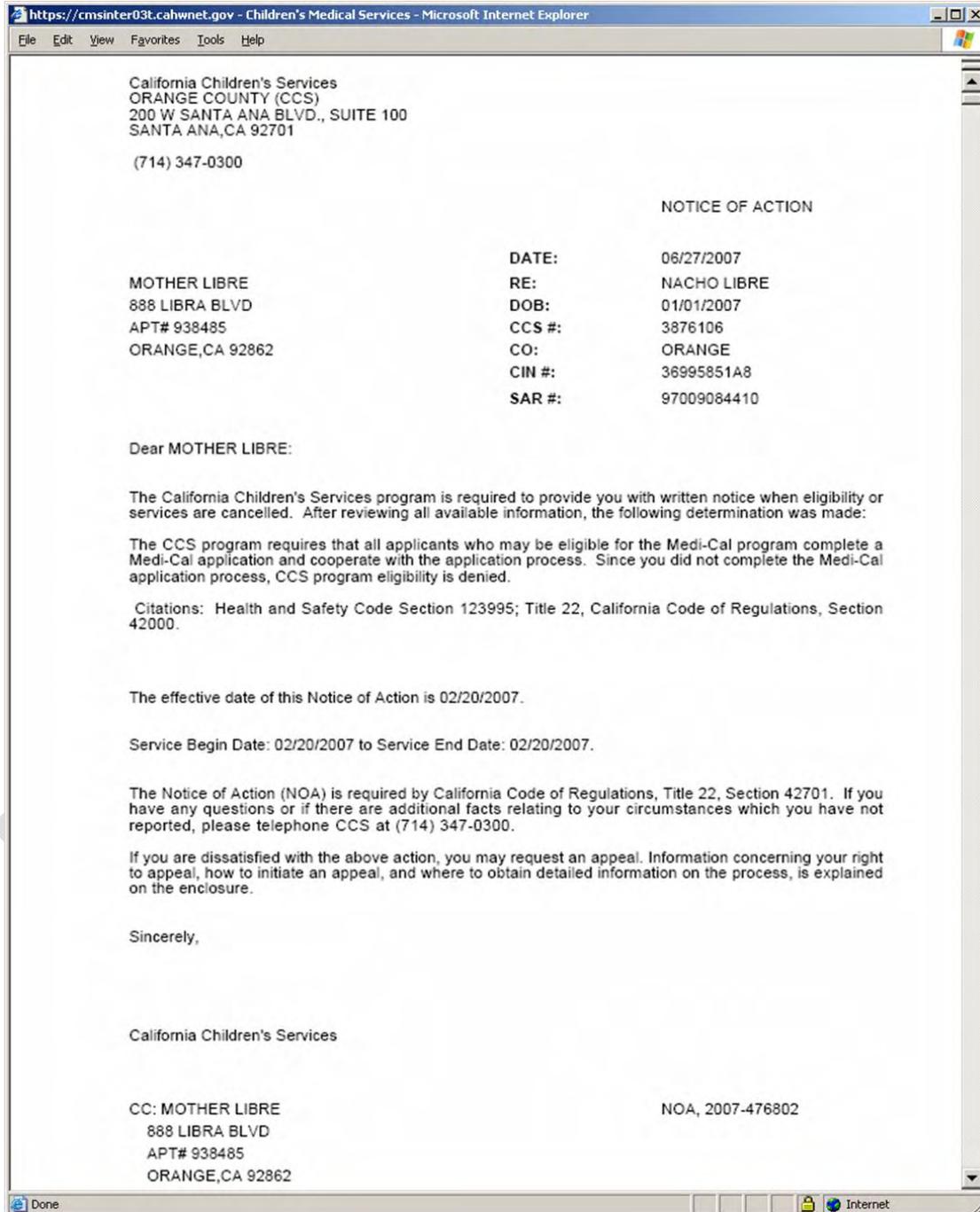


Figure 3-7, Print Display of Correspondence

If multiple letters are selected, the system will print them in the order they appear in the search results screen.

3.6 EDIT CORRESPONDENCE

Click the 'Letter Description' hyperlink to view the letter as shown in Figure 3-8. Edits may be made only by users in the same legal county as the patient.

CORRESPONDENCE

[Search Letters](#) | [Send Free Text Letter](#) | [Print By Location](#) | [Batch Correspondence](#)

CORRESPONDENCE

CLIENT INFORMATION

Client Name:	DRUNKN CURIOUS MUNKY		
Alias:	MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY		
CCS Number:	3857064	Fin Elig Status:	ELIGIBLE
DOB:	01/01/2006	Res Elig Status:	ELIGIBLE
CIII:	34240141A9	Med Elig Status:	ELIGIBLE
Gender:	MALE	Diagnostic Only:	YES
County:	SACRAMENTO	CCS Elig Status:	9K CCS
		Reg Status:	ACTIVE
		Application Status:	NO ACTION
		PSA Status:	SIGNED
		Program Begin Date:	07/26/2006
		Program End Date:	07/25/2007

Click the Letter Description to view the letter

Select Correspondence

	Issued Dt	Letter #	Letter Description	Corresp #	Sent / Print Dt	Sent To:	Address	Issued By	Status
<input type="checkbox"/>	10/15/2007	C-36HF	Application Ltr—Healthy Fam #1	2007-268498	10/15/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	
<input type="checkbox"/>	11/10/2007	NOA	Notice of Action Spanish	2007-268497		Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Paul, Yolonda	
<input type="checkbox"/>	07/30/2007	PSA-CORR	Program Services Agreement (Spanish) - Correspondence Screen	2007-268394	07/30/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Washington, Brenda	
<input type="checkbox"/>	09/13/2007	C-71	Cancel Authorization Letter Spanish	2007-268334	09/13/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Whitaker, LaVorra	
<input type="checkbox"/>	09/10/2007	C-73	Authorization Cover Letter—Distribution Spanish	2007-268311	09/10/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Whitaker, LaVorra	
<input type="checkbox"/>	10/01/2007	NOA	Notice of Action Spanish	2007-267960	10/01/2007	Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Rundall, Julie	
<input type="checkbox"/>	12/08/2007	C-72	Deny Request for Service Spanish	2007-267959		Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Paul, Yolonda	

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Figure 3-8, View Letter by clicking the Letter Description Hyperlink

Figure 3-9 displays the selected letter. Click the 'Edit' button at the bottom of the screen to edit the letter.

CORRESPONDENCE

Search Letters | Send Free Text Letter | Print By Location | Batch Correspondence

CORRESPONDENCE

CLIENT INFORMATION

Client Name:	DRUNKN CURIOUS MUNKY		
Alias:	MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY		
CCS Number:	3857064	Fin Elig Status:	ELIGIBLE
DOB:	01/01/2006	Res Elig Status:	ELIGIBLE
CIN:	34240141A9	Med Elig Status:	ELIGIBLE
Gender:	MALE	Diagnostic Only:	YES
County:	SACRAMENTO	CCS Elig Status:	9K CCS
		Reg Status:	ACTIVE
		Application Status:	NO ACTION
		PSA Status:	SIGNED
		Program Begin Date:	07/26/2006
		Program End Date:	07/25/2007

Print Display

California Children's Services
ORANGE COUNTY (CCS)
200 W SANTA ANA BLVD., SUITE 100
SANTA ANA, CA 92701

(714) 347-0300

NOTICE OF ACTION

<p>MOTHER LIBRE 888 LIBRA BLVD APT# 938485 ORANGE, CA 92862</p>	<p>DATE: 06/27/2007 RE: NACHO LIBRE DOB: 01/01/2007 CCS #: 3876106 CO: ORANGE CIN #: 36995851A8 SAR #: 97009084410</p>
---	---

Dear MOTHER LIBRE:

The California Children's Services program is required to provide you with written notice when eligibility or services are cancelled. After reviewing all available information, the following determination was made:

The CCS program requires that all applicants who may be eligible for the Medi-Cal program complete a Medi-Cal application and cooperate with the application process. Since you did not complete the Medi-Cal application process, CCS program eligibility is denied.

Citations: Health and Safety Code Section 123995; Title 22, California Code of Regulations, Section 42000.

The effective date of this Notice of Action is 02/20/2007.

Service Begin Date: 02/20/2007 to Service End Date: 02/20/2007.

The Notice of Action (NOA) is required by California Code of Regulations, Title 22, Section 42701. If you have any questions or if there are additional facts relating to your circumstances which you have not reported, please telephone CCS at (714) 347-0300.

If you are dissatisfied with the above action, you may request an appeal. Information concerning your right to appeal, how to initiate an appeal, and where to obtain detailed information on the process, is explained on the enclosure.

Sincerely,

California Children's Services

<p>CC: MOTHER LIBRE 888 LIBRA BLVD APT# 938485</p>	<p>NOA, 2007-476802</p>
--	-------------------------

Correspondence Options

Edit
Cancel Letter
Print
Attach
Back

Figure 3-9, Correspondence Edit Options

Figure 3-10 is a display of the edit correspondence screen. Editing an existing correspondence involves the following fields: Addressed To, Free Text, Courtesy Copy Recipients, and Approver (if required).

CORRESPONDENCE

[Search Correspondence](#) | [Send Free Text Correspondence](#) | [Batch Correspondence](#)

CORRESPONDENCE
Required fields are marked with *

CLIENT INFORMATION

Client Name:	DRUNKN CURIOUS MUNKY		
Alias:	MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY		
CCS Number:	3857064	Fin Elig Status:	ELIGIBLE
DOB:	01/01/2006	Res Elig Status:	ELIGIBLE
CIH:	34240141A9	Med Elig Status:	ELIGIBLE
Gender:	MALE	Diagnostic Only:	YES
County:	SACRAMENTO	CCS Elig Status:	9K CCS
		Reg Status:	ACTIVE
		Application Status:	NO ACTION
		PSA Status:	SIGNED
		Program Begin Date:	07/26/2006
		Program End Date:	07/25/2007

Edit Correspondence

Correspondence: NOAS NOTICE OF ACTION SPANISH

Effective Date:* 10/01/2007

Citation:* FIN2.2 INCOME MORE THAN \$40K-POCKET NOT OVER

Addressed To: Mom Libre **Date Issued:** 10/01/2007
Change 8888 Freeway Blvd **Corresp #:** 2007-267801
Apt. 808 **Auth#:** _____
Orange, CA 92862 **Date Printed:** 10/01/2007

Local Education Agency (LEA) Attn: _____

Enter Free Text:

Free text will display on Correspondence. Family income is more than \$40K. This section is editable.

Number of Additional Copies: 2 **Number of Spanish Copies:** 1

Courtesy Copy History

#	Name	Address	Dt Sent
1.	Papa Monkey	3354 Bananas Sundae Way Unit #42 Orange, CA 92862	10/01/2007
2.	Central Coast Alliance for Health	1600 Green Hills Road Scotts Valley, CA 95066	10/01/2007
3.	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	10/01/2007
4.	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	10/01/2007
5.	California Children Services Contra Costa County	597 Center Avenue, Suite 110 Martinez, CA 94553	10/01/2007

Add / Edit

Other Details

Comments:

Comments will not display.

Approval Options

Request Approval From:*

Select Paul, Yolonda; Phelps, Mary Lou; White, Bill; Monday, User

Notify Users:

Notify Seddouki, Samantha; Washington, Brenda

Last Updated Date: 10/01/2007
Cancel Save Save & Print

Last Update By: Julie Rundall

Figure 3-10, Edit Correspondence Screen

The same rules regarding edits to letter types and their respective fields in the CMS Net Legacy system will also apply to the Web Correspondence module. Refer to Table 3-4, Edit Existing Correspondence Data Dictionary.

Spanish copies are printed using the 'Number of Spanish Copies' checkbox.

The 'Approval Options' section will appear depending on whether the current letter requires approval; otherwise, it does not display. If the letter does require approval, then the two fields in that section are required. If the user is a designated Approver, the approval procedure does not apply. There are more details regarding the approval process starting in section [3.10](#).

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Figure 3-11 displays the 'Select Courtesy Copy' pop up screen that allows the selection of parties to send courtesy copies by clicking the 'Add/Edit' button.

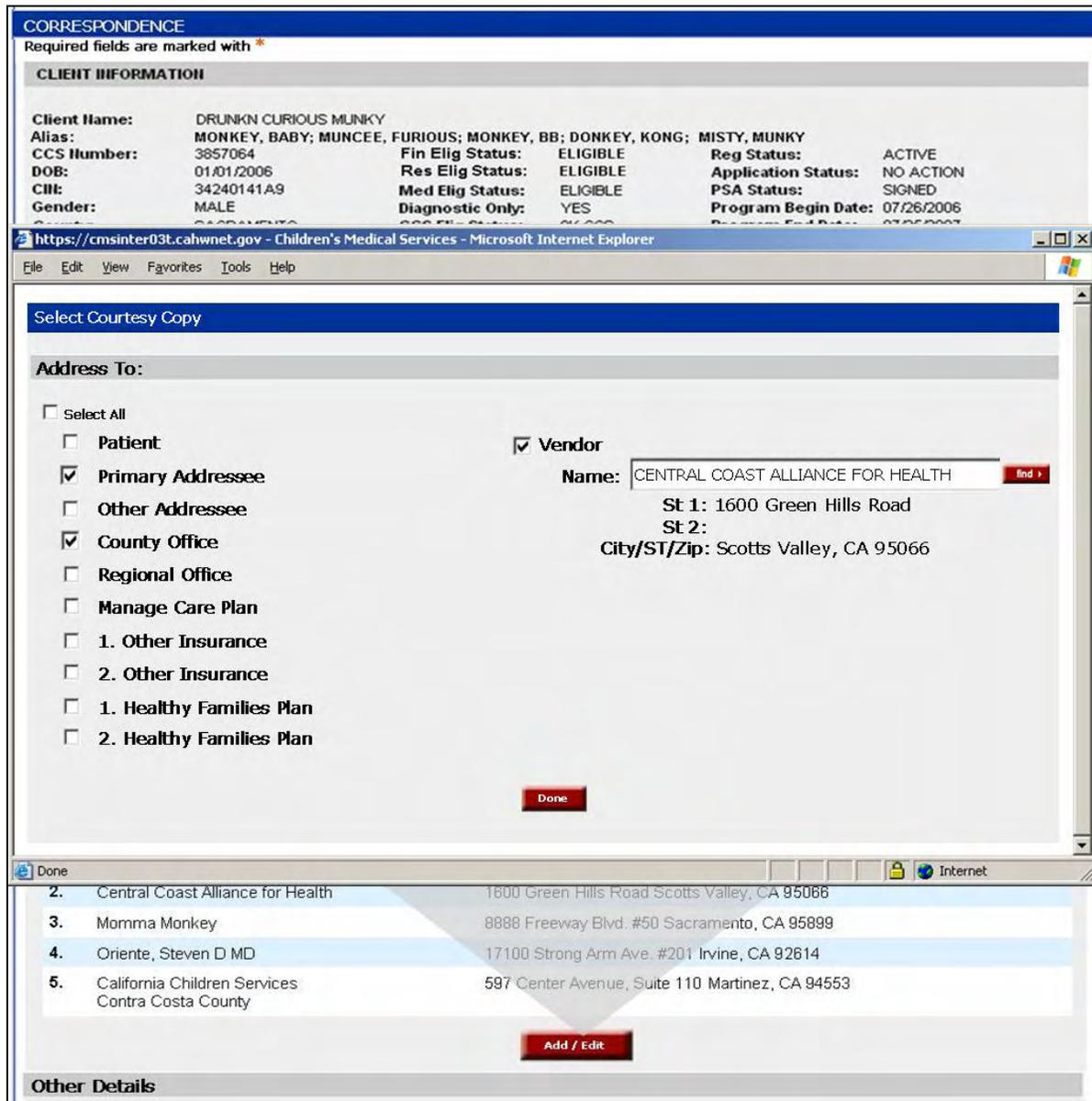


Figure 3-11, Select Parties to Send Courtesy Copy

The same rules regarding the selection of parties to send *Carbon Copies* in CMS Net Legacy will also apply to Web Correspondence regarding Courtesy Copies. For example, if the patient doesn't have a Managed Care plan and Healthy Families plan, then those options does not appear.

Whichever party has a check mark next to it will receive a courtesy copy of the letter. The Case Management NOA is automatically being addressed to the Primary Addressee as the intended receiptient. If a Case Management NOA is generated the system will automatically select the Managed Care Plan and Medical Home to courtesy copy. Users should not be able to remove these parties to courtesy copy. It is mandated by policy that these parties are automatically selected.

The selected parties will appear on the courtesy copy history list. Figure 3-12 displays an example of three additional parties being added to courtesy copy two days after the letter was sent on 10/01/2007. The system captures the date of when the courtesy copies were sent on the 'Courtesy Copy History' log.

Courtesy Copy History			
	Name	Address	Dt Sent
1.	Papa Monkey	3354 Bananas Sundae Way Unit #42 Orange, CA 92862	10/01/2007
2.	Central Coast Alliance for Health	1600 Green Hills Road Scotts Valley, CA 95066	10/01/2007
3.	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	10/01/2007
4.	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	10/01/2007
5.	California Children Services Contra Costa County	597 Center Avenue, Suite 110 Martinez, CA 94553	10/01/2007
6.	Drunkn Munky	3354 Bananas Sundae Way Unit #42 Orange, CA 92862	10/03/2007
7.	Regional Office—SFRO	5900 Van Ness San Francisco, CA 95066	10/03/2007
8.	Health Plan of San Joaquin	1550 W. Fremont St., Suite 200 Stockton, CA 95203	10/03/2007

Add / Edit

Other Details

Comments:

Comments will not display on the letter.

Approval Options

Request Approval From:*

Select Surrogate, User; Delegate PHN II, William; Brows, Fuzzy

Notify Users:

Notify Whitaker, LaVorra; Washington, Brenda

Last Updated Date: 10/01/2007 **Cancel Save Save & Print** Last Update By: Julie Rundall

Figure 3-12, Add Additional Parties to Courtesy Copy

Business Rules for editing correspondence:

1. If editing involves only adding additional parties to courtesy copy, the system does not cancel the letter and does not generate a new one. In addition, if the correspondence has been approved, it does not require the approval process when adding an additional party(ies) to courtesy copy.
2. If the correspondence has not been printed [Date Printed = <blank>], edits can be made and saved without the system having cancel the current letter and generate a new one.
3. If other editable fields such as citations and free text are changed and saved, the system cancels the original and generates a new one based on the edits made. The system displays an option to retain the current listed parties to courtesy copy. If the user doesn't want to retain the current list of parties, the system removes them and displays the courtesy copy pop up screen where the user has the option to select a different set of parties to courtesy copy.

4. If the reissued letter requires approval, it goes through the approval process before appearing on the correspondence list. The previous letter has the reissued indicator and is cancelled. Pending letters can be cancelled.
5. The system generates an automatic case note when a letter is issued or re-issued. The system will reuse the existing General Topic

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The original correspondence entry displays a reissued indicator as shown in Figure 3-13. The reissued indicator is a hyperlink to the replacement correspondence. All cancelled correspondence have a *Cancelled* watermark across the letter. See Figure 3-17 for an example. The system brings up a print display of the new letter. An automatic case note is generated for each event (cancelled and reissued) that occurs.

CORRESPONDENCE

CLIENT INFORMATION

Client Name: DRUNKN CURIOUS MUNKY
Alias: MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY
CCS Number: 3857064 **Fin Elig Status:** ELIGIBLE **Reg Status:** ACTIVE
DOB: 01/01/2006 **Res Elig Status:** ELIGIBLE **Application Status:** NO ACTION
CI#: 34240141A9 **Med Elig Status:** ELIGIBLE **PSA Status:** SIGNED
Gender: MALE **Diagnostic Only:** YES **Program Begin Date:** 07/26/2006
County: SACRAMENTO **CCS Elig Status:** 9K CCS **Program End Date:** 07/25/2007

Select Correspondence

<input type="checkbox"/> Select All	Issued Dt ▼	Corrsp Type ▼	Correspondence Description ▼	Corresp # ▼	Print Dt ▼	Sent To: ▼	Address ▼	Issued By ▼	Status ▼
<input type="checkbox"/>	10/15/2007	C-36HF	Application Ltr—Healthy Fam #1	2007-268498	10/15/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	
<input type="checkbox"/>	12/10/2007	NOA	Notice of Action Spanish	2007-268497		Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Paul, Yolonda	← Reissued Correspondence
<input type="checkbox"/>	07/30/2007	PSA-CORR	Program Services Agreement (Spanish) - Correspondence Screen	2007-268394	07/30/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Washington, Brenda	
<input type="checkbox"/>	09/13/2007	C-71	Cancel Authorization Correspondence Spanish	2007-268334	09/13/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Whitaker, LaVorra	
<input type="checkbox"/>	09/10/2007	C-73	Authorization Cover Correspondence—Distribution Spanish	2007-268311	09/10/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Whitaker, LaVorra	Original Correspondence Cancelled and reissued
<input type="checkbox"/>	10/01/2007	NOA	Notice of Action Spanish	2007-267960	10/01/2007	Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Rundall, Julie	Reissued: 2007-268497
<input type="checkbox"/>	12/08/2007	C-72	Deny Request for Service Spanish	2007-267959		Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Paul, Yolonda	

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Print
Attach
Back

Next 25 Records >>

Figure 3-13, Reissue Letter

Table 3-5, Edit Existing Correspondence Data Dictionary

Obj #	Field Name	Length Type Format	Required?	Description/Comments
17.	Addressed To	70 Alpha Numeric Text	Optional	Displays the addressee information. Values populate from Patient Registration. You may edit the Address To field on the following letters: 1. C-17AI (RELEASE OF INFO – IND CO FORM) 2. CO-FREE1 (FREE TEXT LTR FM CO TO VENDOR) 3. MC 2134 (CCS VENDOR CLOSURE LETTER 1/96) 4. RO-FREE1 (FREE TEXT LTR FM RO TO VENDOR)
18.	Change	1 Control Object Button	Optional	Used to change the default Primary Addressee to a different address on the 'Address To' pop up screen. This button is not available for all edits and free text letters.
19.	Date Issued	10 Date 99/99/9999	Display Only	Displays the date of when the letter was issued (generated).
20.	Corresp #	15 Alpha Numeric 2007-999999	Display Only	System generates a correspondence number for every one that is generated.
21.	Auth #	65 Numeric	Display Only	Used for Legacy authorizations.
22.	Date Sent	10 Date 99/99/9999	Display Only	Displays the date of when the letter was sent (printed).
23.	Letter Type (Abbreviation)	20 Alpha Numeric Text	Display Only	Displays the associated abbreviation of the letter type description selected.
24.	Letter Type (Description)	60 Alpha Numeric Drop down list	Display Only	Displays the current letter type description.
25.	Effective Date	10 Date	Optional	You may edit the Effective Date field on the following letters: 1. NOA (NOTICE OF ACTION)

		99/99/9999		2. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) If changed, the system cancels the letter and reissues a new one with the new effective date.
26.	Citation (Abbreviation)	60 Alpha Numeric	Display Only	Abbreviation of the citation selected.
27.	Citation Description	60 Alpha Numeric Drop down list	Display Only	Description and name of the citation selected. You may edit the Citation field on the following letters: 1. NOA (NOTICE OF ACTION) 2. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) If changed, the system cancels the letter and reissues a new one with the new effective date.
28.	LEA	60 Alpha Numeric Text	Optional	You may edit the LEA Attn field on the following letters: 1. LEA-1 (INC REF FORM FROM LEA/SELPA) 2. LEA-2 (LEA NOTIFICATION OF MED THERAPY PGM STATUS) 3. LEA-3 (LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES) If changed, the system cancels the letter and reissues a new one with the new effective date.
29.	Free Text	250 Alpha Numeric Text	Optional	Free text can be entered and appears on the correspondence when printed. You may edit the Free Text field on the following letters: 1. CO-FREE1 (FREE TEXT LTR FM CO TO VENDOR) 2. CO-FREE2 (FREE TEXT LTR FM CO TO FAMILY) 3. MC 2134 (CCS VENDOR CLOSURE LETTER 1/96) 4. NOA (NOTICE OF ACTION) 5. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) 6. RO-FREE1 (FREE TEXT LTR FM RO TO VENDOR) 7. RO-FREE2 (FREE TEXT LTR FM RO TO FAMILY) If changed, the system cancels the letter and reissues a new one with the new effective date.
30.	Additional Copies	2 Numeric	Optional	The system print an English version by default, but at least one copy must be entered. Additional copies can be printed. You may edit the Number of additional copies field on the following letters: 1. C-17A (PROVIDER RELEASE OF INFORMATION FORM)

				<ul style="list-style-type: none"> 2. C-17AI (RELEASE OF INFO – IND CO FORM) 3. CO-FREE1 (FREE TEXT LTR FM CO TO VENDOR) 4. CO-FREE2 (FREE TEXT LTR FM CO TO FAMILY) 5. DHS 4027 (CCS CONSENT FOR MTP SERVICES) 6. HF STATEMENT (HEALTHY FAMILIES STATEMENT OF ANNUAL INCOME) 7. LEA-1 (INC REF FORM FROM LEA/SELPA) 8. LEA-2 (LEA NOTIFICATION OF MED THERAPY PGM STATUS) 9. LEA-3 (LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES) 10. LEA-4 (MEDICAL ELIG ASSESSMENT PLAN) 11. LEA-5 (UNDETERMINED STATUS NOTIFICATION) 12. LEA-6 (MEDICAL ELIGIBILITY NOTIFICATION) 13. LEA-7 (MED THERAPY CONF APPT NOTICE) 14. MC 2134 (CCS VENDOR CLOSURE LETTER 1/96) 15. MC 2600 (CCS HEALTH INSURANCE INFORMATION FORM) 16. NOA (NOTICE OF ACTION) 17. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) 18. NPP (NOTICE OF PRIVACY PRACTICES (NPP) – HIPAA) 19. PSA (PROGRAM SERVICES AGREEMENT) 20. RO-FREE1 (FREE TEXT LTR FM RO TO VENDOR) 21. RO-FREE2 (FREE TEXT LTR FM RO TO FAMILY)
31.	Spanish Copies	2 Numeric	Required	<p>The system requires at least one Spanish copy if the language is Spanish.</p> <p>You may edit the Number of Spanish copies field on the following letters:</p> <ul style="list-style-type: none"> 1. C-17A (PROVIDER RELEASE OF INFORMATION FORM) 2. C-17AI (RELEASE OF INFO – IND CO FORM) 3. DHS 4027 (CCS CONSENT FOR MTP SERVICES) 4. HF STATEMENT (HEALTHY FAMILIES STATEMENT OF ANNUAL INCOME) 5. LEA-1 (INC REF FORM FROM LEA/SELPA) 6. LEA-2 (LEA NOTIFICATION OF MED THERAPY PGM STATUS) 7. LEA-3 (LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES) 8. LEA-4 (MEDICAL ELIG ASSESSMENT PLAN) 9. LEA-5 (UNDETERMINED STATUS NOTIFICATION) 10. LEA-6 (MEDICAL ELIGIBILITY NOTIFICATION) 11. LEA-7 (MED THERAPY CONF APPT NOTICE) 12. MC 2600 (CCS HEALTH INSURANCE INFORMATION FORM) 13. NOA (NOTICE OF ACTION) 14. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) 15. NPP (NOTICE OF PRIVACY PRACTICES (NPP) – HIPAA) 16. PSA (PROGRAM SERVICES AGREEMENT)

32.	Courtesy Copy Name		Optional	<p>Displays the name of the party receiving the Courtesy Copy.</p> <p>Send courtesy copy to multiple parties using the checkbox. You may edit the Send Carbon Copy To field on the following letters:</p> <ol style="list-style-type: none"> 1. C-17A (PROVIDER RELEASE OF INFORMATION FORM) 2. C-17AI (RELEASE OF INFO – IND CO FORM) 3. CO-FREE1 (FREE TEXT LTR FM CO TO VENDOR) 4. CO-FREE2 (FREE TEXT LTR FM CO TO FAMILY) 5. DHS 4027 (CCS CONSENT FOR MTP SERVICES) 6. HF STATEMENT (HEALTHY FAMILIES STATEMENT OF ANNUAL INCOME) 7. LEA-1 (INC REF FORM FROM LEA/SELPA) 8. LEA-2 (LEA NOTIFICATION OF MED THERAPY PGM STATUS) 9. LEA-3 (LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES) 10. LEA-4 (MEDICAL ELIG ASSESSMENT PLAN) 11. LEA-5 (UNDETERMINED STATUS NOTIFICATION) 12. LEA-6 (MEDICAL ELIGIBILITY NOTIFICATION) 13. LEA-7 (MED THERAPY CONF APPT NOTICE) 14. MC 2134 (CCS VENDOR CLOSURE LETTER 1/96) 15. MC 2600 (CCS HEALTH INSURANCE INFORMATION FORM) 16. NOA (NOTICE OF ACTION) 17. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) 18. NPP (NOTICE OF PRIVACY PRACTICES (NPP) – HIPAA) 19. PSA (PROGRAM SERVICES AGREEMENT) 20. RO-FREE1 (FREE TEXT LTR FM RO TO VENDOR) 21. RO-FREE2 (FREE TEXT LTR FM RO TO FAMILY)
33.	Courtesy Copy Address			<p>Displays the address to the party receiving the Courtesy Copy. If you have edited Send Carbon Copy To field. Applies to the following letters:</p> <ol style="list-style-type: none"> 1. C-17A (PROVIDER RELEASE OF INFORMATION FORM) 2. C-17AI (RELEASE OF INFO – IND CO FORM) 3. CO-FREE1 (FREE TEXT LTR FM CO TO VENDOR) 4. CO-FREE2 (FREE TEXT LTR FM CO TO FAMILY) 5. DHS 4027 (CCS CONSENT FOR MTP SERVICES) 6. HF STATEMENT (HEALTHY FAMILIES STATEMENT OF ANNUAL INCOME) 7. LEA-1 (INC REF FORM FROM LEA/SELPA) 8. LEA-2 (LEA NOTIFICATION OF MED THERAPY PGM STATUS) 9. LEA-3 (LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES) 10. LEA-4 (MEDICAL ELIG ASSESSMENT PLAN) 11. LEA-5 (UNDETERMINED STATUS NOTIFICATION) 12. LEA-6 (MEDICAL ELIGIBILITY NOTIFICATION) 13. LEA-7 (MED THERAPY CONF APPT NOTICE)

				<p>14. MC 2134 (CCS VENDOR CLOSURE LETTER 1/96) 15. MC 2600 (CCS HEALTH INSURANCE INFORMATION FORM) 16. NOA (NOTICE OF ACTION) 17. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) 18. NPP (NOTICE OF PRIVACY PRACTICES (NPP) – HIPAA) 19. PSA (PROGRAM SERVICES AGREEMENT) 20. RO-FREE1 (FREE TEXT LTR FM RO TO VENDOR) 21. RO-FREE2 (FREE TEXT LTR FM RO TO FAMILY)</p>
34.	Dt Sent (Courtesy Copies)	10 Date 99/99/9999	Display Only	Displays the date of when the courtesy copies were sent to the selected parties.
35.	Add/Edit	1 Control Object Button	No	<p>Click 'Add/Edit' button to bring up the Address To pop up screen to add or remove parties to send courtesy copies of the letter. This functionality is used for both main addressee and courtesy copy recipients.</p> <p>Selected parties cannot be removed after the letter has been sent. At this point, the user can only add additional parties to courtesy copy.</p>
36.	Comments	250 Alpha Numeric Text	Optional	<p>Comments can be entered, but does not display on the letter. Enter the comments you want saved with this screen and populated into the Case Note.</p> <p>You may edit the Comments field on the following letters:</p> <ol style="list-style-type: none"> 1. C-17A (PROVIDER RELEASE OF INFORMATION FORM) 2. C-17AI (RELEASE OF INFO – IND CO FORM) 3. CO-FREE1 (FREE TEXT LTR FM CO TO VENDOR) 4. CO-FREE2 (FREE TEXT LTR FM CO TO FAMILY) 5. DHS 4027 (CCS CONSENT FOR MTP SERVICES) 6. HF STATEMENT (HEALTHY FAMILIES STATEMENT OF ANNUAL INCOME) 7. LEA-1 (INC REF FORM FROM LEA/SELPA) 8. LEA-2 (LEA NOTIFICATION OF MED THERAPY PGM STATUS) 9. LEA-3 (LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES) 10. LEA-4 (MEDICAL ELIG ASSESSMENT PLAN) 11. LEA-5 (UNDETERMINED STATUS NOTIFICATION) 12. LEA-6 (MEDICAL ELIGIBILITY NOTIFICATION) 13. LEA-7 (MED THERAPY CONF APPT NOTICE) 14. MC 2134 (CCS VENDOR CLOSURE LETTER 1/96) 15. MC 2600 (CCS HEALTH INSURANCE INFORMATION FORM) 16. NOA (NOTICE OF ACTION) 17. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) 18. NPP (NOTICE OF PRIVACY PRACTICES (NPP) – HIPAA) 19. PSA (PROGRAM SERVICES AGREEMENT)

				20. RO-FREE1 (FREE TEXT LTR FM RO TO VENDOR) 21. RO-FREE2 (FREE TEXT LTR FM RO TO FAMILY)
37.	Sent / Print Date	10 Date 99/99/9999	Display Only	Displays the date of when the letter was sent or printed
38.	Request Approval From	30 Drop down list Text	No	Required if the letter requires approval. The drop down list displays all the user names that have been designated to approve letters. Approval process is not required if the user is already a designated Approver. Users are determined in the User Security module.
39.	Approval Option	20 Drop down list Text	No	Required if the letter required approval. Values are: 1. Submit for Approval – Only available to the creator of the letter. This option sends an automatic Web Message to the Requestor for approval of the letter. 2. Deny Approval – Available to the Approvers only. 3. Approve Letter – Available to the Approvers only.
40.	Send	1 Control Object Button	No	Click 'Send' to save the edits made. The system cancels the original letter and generates a new one based on the edits made.
41.	Cancel	1 Control Object Button	No	Click 'Cancel' to cancel sending the letter. The system displays a confirmation message before canceling. It will return to the Correspondence list.

3.7 CANCEL CORRESPONDENCE

Not all generated correspondence types can be cancelled from Web Correspondence. Correspondence in a series must still be cancelled or reissued from within their respective patient modules. The identified correspondence that can be cancelled in CMS Net Legacy applies to Web Correspondence. Canceling a correspondence can be done by selecting the letter then the 'Cancel Correspondence' button. A confirmation message displays before the cancellation is complete as shown below in Figure 3-14.

CORRESPONDENCE

•Are you sure you want to cancel Correspondence #2007-268311?

YES NO Continue

Search Correspondence | Send Free Text Correspondence | Batch Correspondence

CORRESPONDENCE

CLIENT INFORMATION

Client Name: DRUNKN CURIOUS MUNKY	Fin Elig Status: ELIGIBLE	Reg Status: ACTIVE
Alias: MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY	Res Elig Status: ELIGIBLE	Application Status: NO ACTION
CCS Number: 3857064	Med Elig Status: ELIGIBLE	PSA Status: SIGNED
DOB: 01/01/2006	Diagnostic Only: YES	Program Begin Date: 07/26/2006
CIH: 34240141A9	CCS Elig Status: 9K CCS	Program End Date: 07/25/2007
Gender: MALE		
County: SACRAMENTO		

Print Display

California Children's Services
SRO-SACRAMENTO REGIONAL OFFICE
P.O. BOX 997413
MS 8100
SACRAMENTO, CA 95899-7413

01/09/2008

MOM LIBRE
8888 FREEWAY BLVD
APT #500
SACRAMENTO, CA 95831

RE: NACHO LIBRE
CCS #: 3868101
DOB: 01/01/2007
County: SACRAMENTO
CIN #: 32481471A0

Authorization For Treatment Services

NACHO LIBRE has been authorized for services in the CCS program. Service authorization 97008750280 is effective from 04/05/2007 to 04/05/2007 with the following Special Care Center (SCC), specialist, or provider:

DOCTORS MEDICAL CENTER
1441 FLORIDA AVENUE
P.O. BOX 4138
MODESTO, 95350

Please call the above provider at: for appointments and follow-up treatment.

Remember to take this letter, your child's Beneficiary Identification Card (BIC), in addition to any other Health Plan cards to this appointment. Please inform the office of your CCS coverage and authorization for treatment.

This letter will need to be shown to DOCTORS MEDICAL CENTER and any other providers your child may be referred to in order to expedite your child's ability to receive additional medical services.

Please call the SRO-SACRAMENTO REGIONAL OFFICE CCS office at (916) 327-3100 if your child is referred to any other source for treatment. All authorizations must be made in advance by the CCS office.

Sincerely,

Correspondence Options

Edit Cancel Correspondence Print Attach Back Approve Deny

Figure 3-14, Cancel Correspondence

A final message displays describing the correspondence was cancelled. Focus is set on the 'OK' button. Click 'OK' to return to the search results screen. The system displays the cancellation watermark and the effective date as shown in Figure 3-15.

CORRESPONDENCE

•Correspondence #2007-268311 Correspondence Type 'C-71' for patient

OK

Search Correspondence | Send Free Text Correspondence | Batch Correspondence

CORRESPONDENCE

CLIENT INFORMATION

Client Name:	DRUNKN CURIOUS MUNKY		
Alias:	MONKEY, BABY; MUNCIE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY		
CCS Number:	3857064	Fin Elig Status:	ELIGIBLE
DOB:	01/01/2006	Res Elig Status:	ELIGIBLE
CIN:	34240141A9	Med Elig Status:	ELIGIBLE
Gender:	MALE	Diagnostic Only:	YES
County:	SACRAMENTO	CCS Elig Status:	9K CCS
		Reg Status:	ACTIVE
		Application Status:	NO ACTION
		PSA Status:	SIGNED
		Program Begin Date:	07/26/2006
		Program End Date:	07/25/2007

Print Display

California Children's Services
 SRO-SACRAMENTO REGIONAL OFFICE
 P.O. BOX 997413
 MS 8100
 SACRAMENTO, CA 95899-7413

CANCELLED
 Effective Date: 01/09/2008

MOM LIBRE 8888 FREEWAY BLVD APT #500 SACRAMENTO, CA 95831	RE: NACHO LIBRE CCS #: 3868101 DOB: 01/01/2007 County: SACRAMENTO CIN #: 32481471A0
--	---

Authorization For Treatment Services

NACHO LIBRE has been authorized for services in the CCS program. Service authorization 97008750280 is effective from 04/05/2007 to 04/05/2007 with the following Special Care Center (SCC), specialist, or provider:

DOCTORS MEDICAL CENTER
 1441 FLORIDA AVENUE
 P.O. BOX 4138
 MODESTO, 95350

Please call the above provider at: for appointments and follow-up treatment.

Remember to take this letter, your child's Beneficiary Identification Card (BIC), in addition to any other Health Plan cards to this appointment. Please inform the office of your CCS coverage and authorization for treatment.

This letter will need to be shown to DOCTORS MEDICAL CENTER and any other providers your child may be referred to in order to expedite your child's ability to receive additional medical services.

Please call the SRO-SACRAMENTO REGIONAL OFFICE CCS office at (916) 327-3100 if your child is referred to any other source for treatment. All authorizations must be made in advance by the CCS office.

Sincerely,

Correspondence Options

Edit
Cancel Correspondence
Print
Attach
Back
Approve
Deny

Figure 3-15, Cancelled Letter with Watermark

On the search results screen, the system updates the correspondence entry with a cancelled indicator as shown in Figure 3-16. For cancelled letters, the cancelled indicator displays on the status column. It also lists user that cancelled the correspondence and when the event occurred. An automatic case note is created to record the cancellation event.

CORRESPONDENCE

Search Correspondence | Send Free Text Correspondence | Batch Correspondence

CORRESPONDENCE

CLIENT INFORMATION

Client Name: DRUNKN CURIOUS MUNKY
Alias: MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY
CCS Number: 3857064 **Fin Elig Status:** ELIGIBLE **Reg Status:** ACTIVE
DOB: 01/01/2006 **Res Elig Status:** ELIGIBLE **Application Status:** NO ACTION
CI#: 34240141A9 **Med Elig Status:** ELIGIBLE **PSA Status:** SIGNED
Gender: MALE **Diagnostic Only:** YES **Program Begin Date:** 07/26/2006
County: SACRAMENTO **CCS Elig Status:** 9K CCS **Program End Date:** 07/25/2007

Cancellation Water Mark will appear on Reissued and Cancelled Correspondence

Select Correspondence

<input type="checkbox"/> Select All	Issued Dt ▼	Corresp Type# ▼	Correspondence Description ▼	Corresp # ▼	Sent / Print Dt ▼	Sent To: ▼	Address ▼	Issued By ▼	Status ▼
<input type="checkbox"/>	10/15/2007	C-36HF	<u>Application Ltr—Healthy Fam #1</u>	2007-268498	10/15/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	
<input type="checkbox"/>	12/10/2007	NOA	<u>Notice of Action Spanish</u>	2007-268497		Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Paul, Yolonda	
<input type="checkbox"/>	07/30/2007	PSA-CORR	<u>Program Services Agreement (Spanish) - Correspondence Screen</u>	2007-268394	07/30/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Washington, Brenda	
<input type="checkbox"/>	09/13/2007	C-71	<u>Cancel Authorization Correspondence Spanish</u>	2007-268334	09/13/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Whitaker, LaVorra	
<input type="checkbox"/>	09/10/2007	C-73	<u>Authorization Cover Correspondence—Distribution Spanish</u>	2007-268311	09/10/2007	Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Whitaker, LaVorra	Cancelled By: Rundall, Julie 01/09/2008
<input type="checkbox"/>	10/01/2007	NOA	<u>Notice of Action Spanish</u>	2007-267960	10/01/2007	Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Rundall, Julie	Reissued: 2007-268497
<input type="checkbox"/>	12/08/2007	C-72	<u>Deny Request for Service Spanish</u>	2007-267959		Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Paul, Yolonda	

Found 1-7 out of 45 Matching Records

Next 25 Records >>

Figure 3-16, Cancelled Correspondence Indicator

If a letter is involved with Batch Correspondence and is cancelled the same day it was issued, then the correspondence is not queued for batch printing.

Correspondences can be reprinted regardless of status – cancelled or reissued. Figure 3-17 is a print display of a cancelled letter with the cancelled water mark.

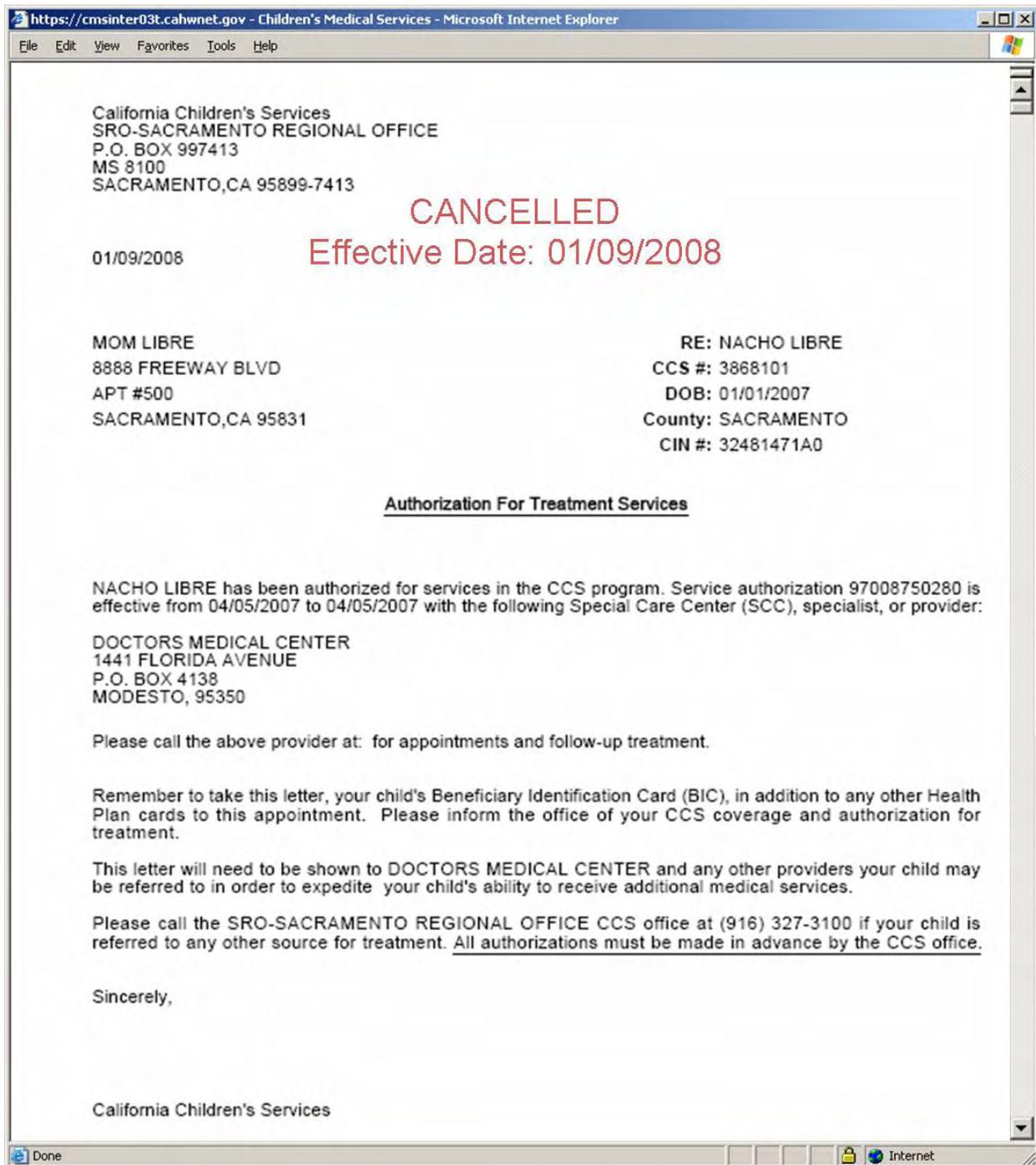


Figure 3-17, Print Cancelled Correspondence

3.8 SEND FREE TEXT CORRESPONDENCE

Some correspondences are system generated while others are done manually. The rules for sending free text letters in CMS Net Legacy applies to Web Correspondence. Figure 3-18 displays the screen for sending a free text correspondence. If this correspondence did require approval, then the 'Approval Options' section appears at the bottom of the screen.

CORRESPONDENCE

Search Correspondence Send Free Text Correspondence Batch Correspondence

CORRESPONDENCE

Required fields are marked with *

CLIENT INFORMATION

Client Name:	DRUNKN CURIOUS MUNKY		
Alias:	MONKEY, BABY; MUNCIE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY		
CCS Number:	3857064	Fin Elig Status:	ELIGIBLE
DOB:	01/01/2006	Res Elig Status:	ELIGIBLE
CIH:	34240141A9	Med Elig Status:	ELIGIBLE
Gender:	MALE	Diagnostic Only:	YES
County:	SACRAMENTO	CCS Elig Status:	9K CCS
		Reg Status:	ACTIVE
		Application Status:	NO ACTION
		PSA Status:	SIGNED
		Program Begin Date:	07/26/2006
		Program End Date:	07/25/2007

Edit Correspondence

Correspondence: * CCS-17 MED RPT REQ-ROI COVER CORRESPONDENCE-DEP CO.

Effective Date: *

Citation: *

Addressed To: Mom Libre
Change 8888 Freeway Blvd
 Apt. #500
 Orange, CA 92862

The selected Correspondence Type will dictate which fields can

Date Issued: _____

Corresp #: _____

Auth #: _____

Date Printed: _____

Local Education Agency (LEA) Attn: _____

Enter Free Text:

Number of Additional Copies: **Number of Spanish Copies:**

Courtesy Copy History

Name	Address
1.	

Add / Edit

Other Details

Comments:

Approval Options

Approval Options section will appear if the correspondence requires approval

Last Updated Date: _____ Cancel Save Save & Print **Last Update By:** Julie Rundall

Figure 3-18, Send Free Text Letter

3.8.1 Send Free Text Letter Data Dictionary

Table 3-6, Send Free Text Correspondence Data Dictionary

Obj #	Field Name	Length Type Format	Required?	Description/Comments
42.	Addressed To	30 Alpha Numeric Text	Yes	<p>Displays the addressee information. The ability to change the Addressee information depends on the letter selected. Values populate from Patient Registration.</p> <p>Based on letter selection defaults to:</p> <ul style="list-style-type: none"> • Primary Addressee from the Patient Registration Face Sheet –or • Vendor from Vendor Registration –or • User entered
43.	Change	1 Control Object Button	No	<p>Used to change the default Primary Addressee to a different address on the 'Address To' pop up screen.</p> <p>This button is not available for all edits and free text letters. The ability to change the Addressee information depends on the letter selected.</p>
44.	Corresp #	15 Alpha Numeric 2007-999999	Display Only	System generates a correspondence number for every one that is generated.
45.	Letter Type	60 Alpha Numeric Drop down list	Yes	<p>Values are stored in the Correspondence table. Required Choose from the Pick List and Press <Enter>. Values:</p> <ol style="list-style-type: none"> 1. C-17A (PROVIDER RELEASE OF INFORMATION FORM) 2. C-17AI (RELEASE OF INFO – IND CO FORM) 3. CO-FREE1 (FREE TEXT LTR FM CO TO VENDOR) 4. CO-FREE2 (FREE TEXT LTR FM CO TO FAMILY) 5. DHS 4027 (CCS CONSENT FOR MTP SERVICES) 6. HF STATEMENT (H.F. STATEMENT OF ANNUAL INCOME) 7. LEA-1 (INC REF FORM FROM LEA/SELPA) 8. LEA-2 (LEA NOTIFICATION OF MED THERAPY PGM STATUS) 9. LEA-3 (LEA NOTIFICATION OF DELAY IN MEDICAL SERVICES) 10. LEA-4 (MEDICAL ELIG ASSESSMENT PLAN) 11. LEA-5 (UNDETERMINED STATUS NOTIFICATION) 12. LEA-6 (MEDICAL ELIGIBILITY NOTIFICATION)

				13. LEA-7 (MED THERAPY CONF APPT NOTICE) 14. MC 2134 (CCS VENDOR CLOSURE LETTER 1/96) 15. MC 2600 (CCS HEALTH INSURANCE INFORMATION FORM) 16. NOA (NOTICE OF ACTION) 17. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) 18. NPP (NOTICE OF PRIVACY PRACTICES (NPP) – HIPAA) 19. PSA (PROGRAM SERVICES AGREEMENT) 20. RO-FREE1 (FREE TEXT LTR FM RO TO VENDOR) 21. RO-FREE2 (FREE TEXT LTR FM RO TO FAMILY)
46.	Auth #	65 Numeric	No	Not used for correspondence generated manually.
47.	Effective Date	10 Date 99/99/9999	Yes	Required if letter is: 1. NOA (NOTICE OF ACTION) 2. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY)
48.	Date Issued	10 Date 99/99/9999	Display Only	Displays the date of when the letter was issued.
49.	Date Printed	10 Date 99/99/9999	Display Only	Displays the date of when the letter printed.
50.	Citation	6 Alpha Numeric	Display Only	Abbreviation of the citation selected.
51.	Citation Description	40 Alpha Numeric Drop down list	Yes	Required if letter is: 1. NOA (NOTICE OF ACTION) 2. NOA-DEP CO (NOTICE OF ACTION – DEPENDENT COUNTY) Choose Values: • AGE1 (DENY APP - OVER 21) • FIN2.2 (INCOME MORE THAN \$40K-POCKET NOT OVER) • FIN3 (FAILED TO USE HEALTH INS COVG) • FIN4 (FAILED TO PAY ENROLL FEE) • FIN5 (HMO-NOT ELIGIBLE) • FIN6 (PROGRAM ELIG PROCESS INCOMPLETE) • MED1 (MED ELIG DENIAL) • MED2 (MED ELIG DENIAL – MTU) • MISC1 (CONDITION DIAGNOSED AFTER ADOPTION)

				<ul style="list-style-type: none"> • MISC2 (FAMILY DOESN'T WANT CCS) • MISC3 (NO ACTIVITY/SERVICES) • NSC (NON-STANDARD CITATION (BLANK)) • RS1 (DENY REQUEST - NOT MEDICALLY NECESSARY) • RS2 (DENY REQUEST - NON-APPROVED PHYS) • RS3 (DENY REQUEST - NON-APPROVED PROVIDER) • RS4 (DENY REQUEST - NON-APPROVED HOSP) • RS5 (DENY REQUEST - SERVICE PRIOR TO REQUEST) • RS6 (DENY REQUEST - HMO BENEFIT)
52.	LEA	60 Alpha Numeric Text	Optional	<p>Valid only for LEA1 – LEA7</p> <p>Enter the name of the person you wish to address the letter to.</p>
53.	Free Text	250 Alpha Numeric Text	Optional	<p>Valid only for:</p> <ul style="list-style-type: none"> • CO-FREE1 • CO-FREE2 • MC 2134 • NOA • NOA-DEP CO • RO-FREE1 • RO-FREE2 <p>Enter the free form text you want to appear in the body of the letter.</p>
54.	Additional Copies	2 Numeric	Yes	<p>Enter the number of additional copies you want to print excluding Carbon Copies. The system automatically prints an additional copy for each Carbon Copy recipient.</p>
55.	Spanish Copies	2 Numeric	Yes	<p>The system requires at least one Spanish copy if the ethnicity is Hispanic.</p> <p>Enter the number of additional Spanish copies you want to print excluding Carbon Copies. The system automatically prints one Spanish copy for the letter recipient.</p>
56.	Comments	250 Alpha Numeric Text	Optional	<p>Comments can be entered, but do not display on the letter.</p> <p>Enter the comments you want saved with this screen and populated into the Narrative.</p>
57.	Send Carbon Copy To		Optional	<p>Send carbon copy to multiple parties using the checkbox.</p> <p>Enter the type of entity/person you want to send a carbon copy to.</p> <p>Choose from the Pick List and Press <Enter>. Values:</p>

				<ul style="list-style-type: none"> • COUNTY OFFICE • HEALTHY FAMILIES PLAN • OTHER • PATIENT • REGIONAL OFFICE • VENDOR • MANAGED CARE PLAN (when managed care plan is present on insurance screen)
58.	Send Carbon Copy To		No	<p>Based on selection in Send Carbon Copy to field, defaults to:</p> <ul style="list-style-type: none"> • County office based on legal county on Patient Registration Face Sheet –or • Patient from Patient Registration Face Sheet –or • Regional Office based on legal county on Patient Registration Face Sheet –or • Managed Care plan from insurance/other coverage, if multiple plans, select from pick-list - or – • Enter a search value to obtain a pick-list for a Healthy Families plan – or – <p>Enter free text name and address of the entity/person to which to send a carbon copy.</p>
59.	Send	1 Control Object Button	No	Click 'Send' to save the edits made. The system cancels the original letter and generates a new one based on the edits made.
60.	Cancel	1 Control Object Button	No	Click 'Cancel' to cancel. The system displays a confirmation message before cancelling. It returns to the Correspondence list.

3.9 ADMINISTER LETTERS FOR MANDATORY APPROVAL

The approval letter process is *optional* for all locations. State and county systems administrators have the ability to designate users to be Approvers of certain correspondences that are issued using the User Security module. Figure 3-19 displays the five letters available that counties can designate to require approval.

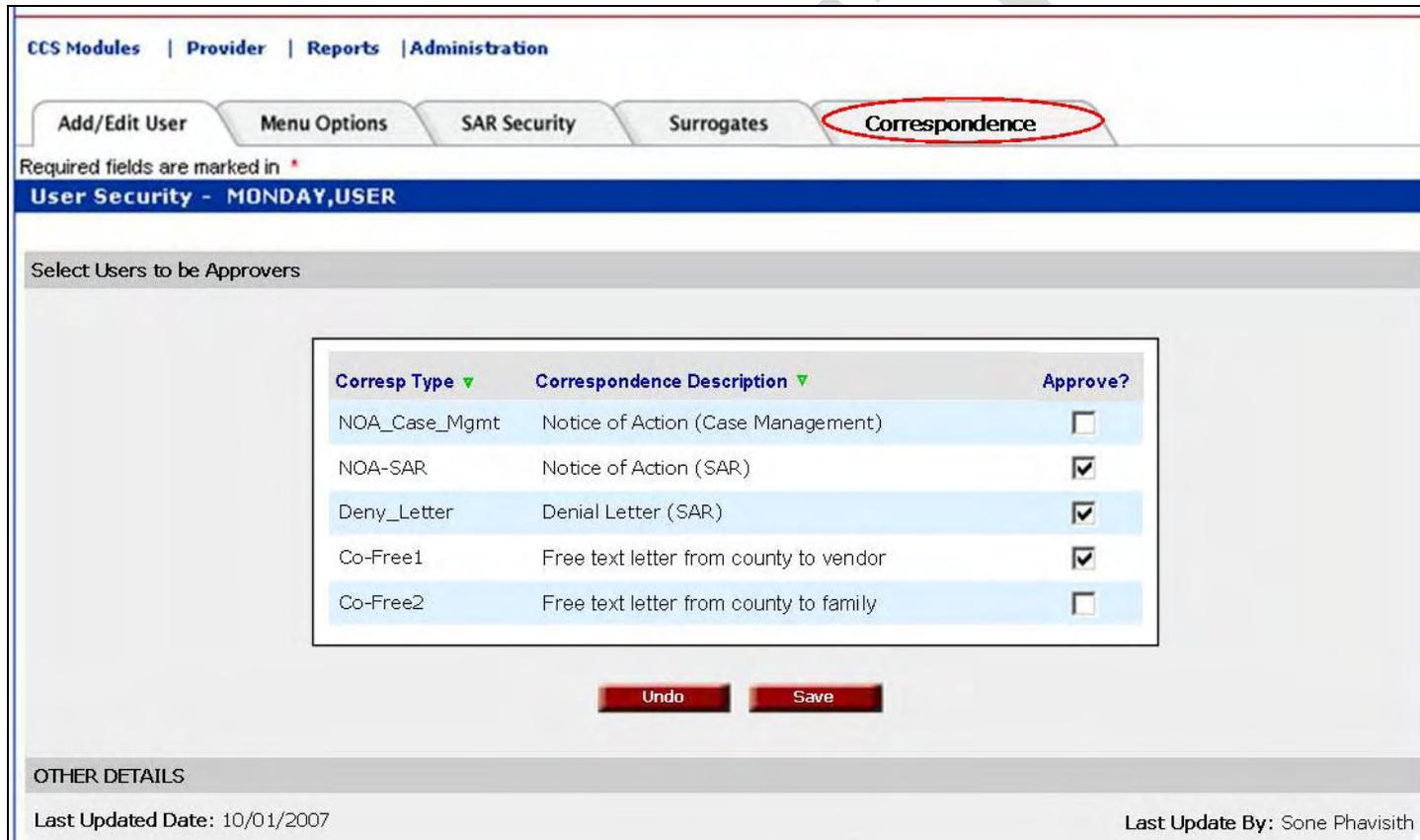


Figure 3-19, Correspondence Administration Approval screen

In the example above, User Monday has been designated as the Approver to approve the following correspondence types: NOA-SAR, Deny_Letter, and Co-Free1. Each time a user tries to issue one of those letters, User Monday is listed as one of the Approvers to select on the 'Edit Correspondence' screen.

Rules for Approval Correspondences:

1. Correspondence approvals are *optional* to counties
2. Selecting letters and Approvers can only be done by County and State system administrators.
3. For Independent Counties: Correspondences can only be approved by users from the same legal county.
4. For Dependent Counties: Correspondences can only be approved by users from the same legal county or the associated Regional Office.
5. Users from a Regional Office can be an Approver for multiple Dependent counties within their region.
6. Approval process does not apply if the user issuing the correspondence is a designated Approver. The correspondence will automatically get approved.

DRAFT

Table 3-7, Correspondence Approval Data Dictionary

Obj #	Field Name	Length Type Format	Required?	Description/Comments										
61.	Corresp Type	13 Alpha numeric Text	Display Only	<p>Displays the types of correspondences that can be designated to require approval.</p> <p>The following correspondences are:</p> <table border="0"> <tr> <td>1. NOA_Case_Management</td> <td>Notice of Action (Case Management)</td> </tr> <tr> <td>2. NOA_SAR</td> <td>Notice of Action (SAR)</td> </tr> <tr> <td>3. Deny_Letter</td> <td>Denial Letter (SAR)</td> </tr> <tr> <td>4. Co-Free1</td> <td>Free text letter from county to vendor</td> </tr> <tr> <td>5. Co-Free2</td> <td>Free text letter from county to family</td> </tr> </table>	1. NOA_Case_Management	Notice of Action (Case Management)	2. NOA_SAR	Notice of Action (SAR)	3. Deny_Letter	Denial Letter (SAR)	4. Co-Free1	Free text letter from county to vendor	5. Co-Free2	Free text letter from county to family
1. NOA_Case_Management	Notice of Action (Case Management)													
2. NOA_SAR	Notice of Action (SAR)													
3. Deny_Letter	Denial Letter (SAR)													
4. Co-Free1	Free text letter from county to vendor													
5. Co-Free2	Free text letter from county to family													
62.	Correspondence Description	60 Alpha numeric Text	Display Only	<p>Displays the descriptions of correspondences that can be designated to require approval.</p> <p>The following correspondences are:</p> <table border="0"> <tr> <td>1. NOA_Case_Management</td> <td>Notice of Action (Case Management)</td> </tr> <tr> <td>2. NOA_SAR</td> <td>Notice of Action (SAR)</td> </tr> <tr> <td>3. Deny_Letter</td> <td>Denial Letter (SAR)</td> </tr> <tr> <td>4. Co-Free1</td> <td>Free text letter from county to vendor</td> </tr> <tr> <td>5. Co-Free2</td> <td>Free text letter from county to family</td> </tr> </table>	1. NOA_Case_Management	Notice of Action (Case Management)	2. NOA_SAR	Notice of Action (SAR)	3. Deny_Letter	Denial Letter (SAR)	4. Co-Free1	Free text letter from county to vendor	5. Co-Free2	Free text letter from county to family
1. NOA_Case_Management	Notice of Action (Case Management)													
2. NOA_SAR	Notice of Action (SAR)													
3. Deny_Letter	Denial Letter (SAR)													
4. Co-Free1	Free text letter from county to vendor													
5. Co-Free2	Free text letter from county to family													
63.	Approve?	1 Control Object Checkbox	No	<p>Check this box to designate the user to be the Approver of the corresponding letter.</p> <p>1. If selected, the user's name will appear as an option on the Approvers list in the 'Edit Correspondence' screen.</p>										
64.	Undo	1 Control Object Checkbox	No	<p>Click 'Undo' to restore the previous settings if the changes have not been saved yet.</p>										
65.	Save	1 Control Object Checkbox	Yes	<p>Click 'Save' to save the changes made on the approval matrix.</p>										
66.	Last Updated Date	10 Date	Display Only	<p>Displays the last date the screen was last updated.</p>										

Web Correspondence

		99/99/9999		
67.	Last Updated By	30 Alpha Numeric Text	Display Only	Displays the name of the system administrator that made the last update.

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3.10 CORRESPONDENCE PROCESS

3.10.1 CMS Net Legacy Letter Process Flow Chart

Figure 3-20 displays the flow chart of the correspondence process for letters generated in the CMS Net Legacy system.

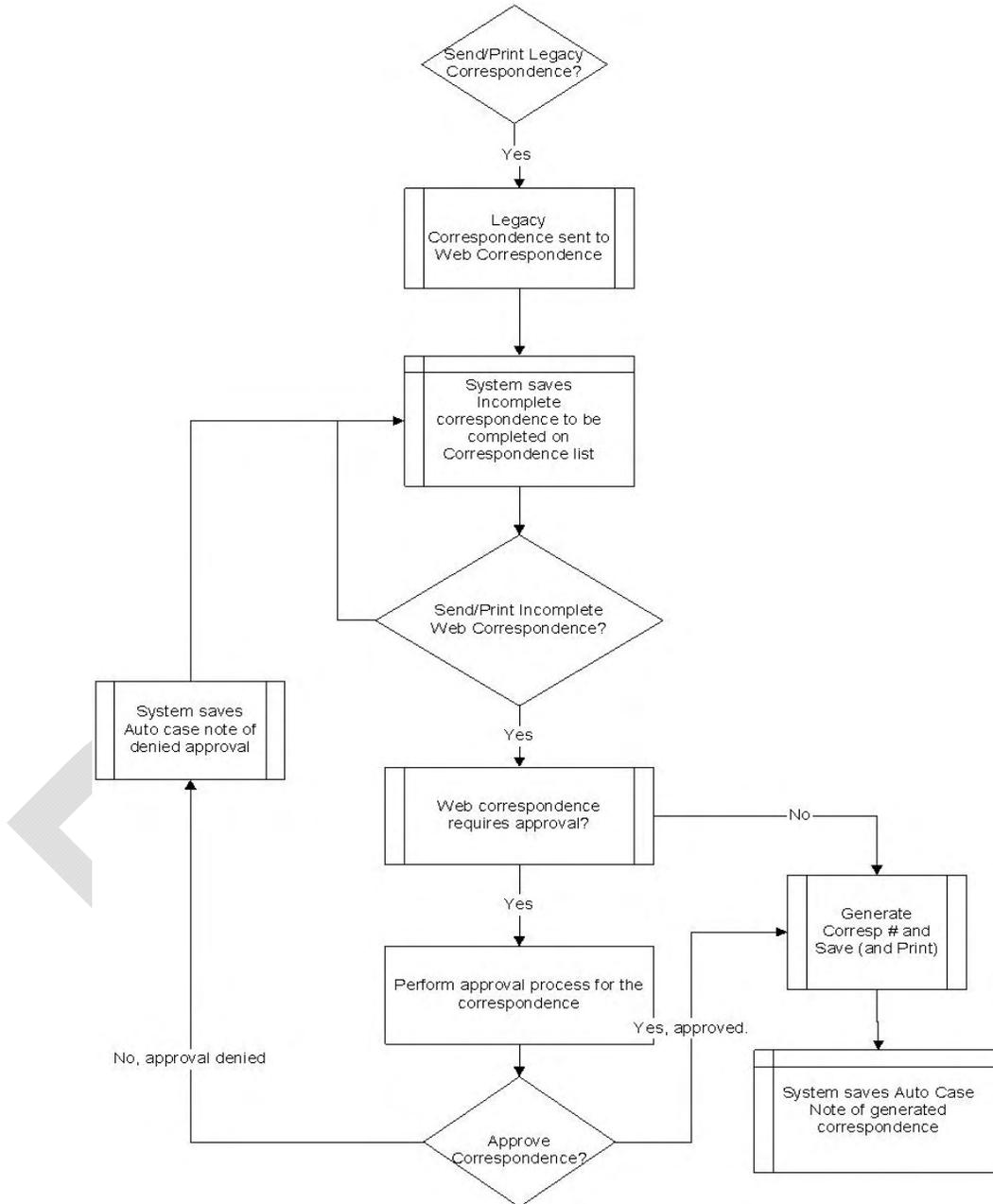


Figure 3-20, Correspondence Flow Chart for CMS Net Legacy

3.10.2 CMS Net Web Correspondence Process Flow Chart

If the user generating the letter is a designated Approver, then the approval process does not apply. Figure 3-21 displays the flow chart of the letter approval process for letters generated in the CMS Net Web system.

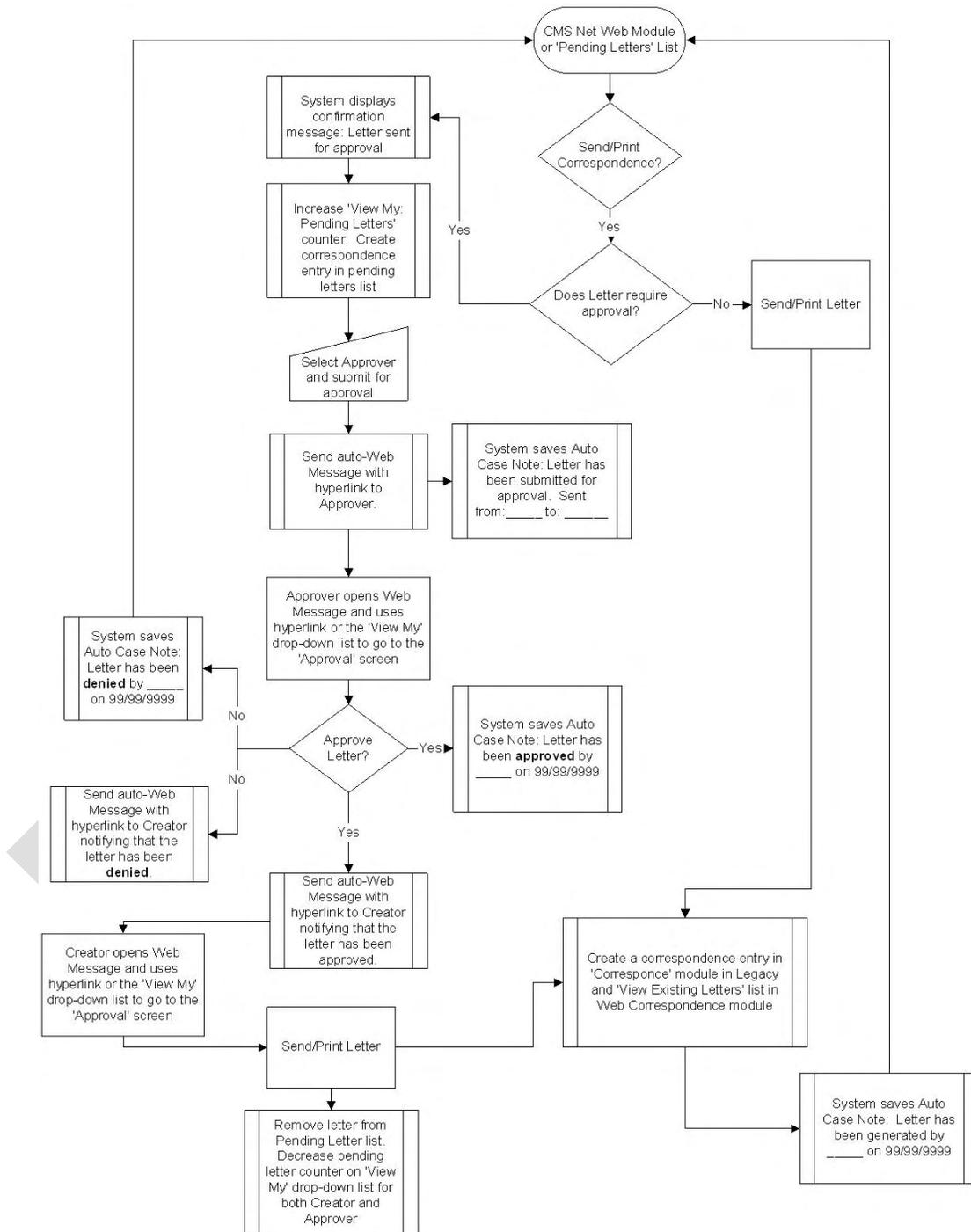


Figure 3-21, Correspondence Flow Chart for CMS Net Web

3.10.3 New CMS Net Legacy Letter Process

Correspondences in CMS Legacy can no longer be generated from that system. When a user tries to generate a correspondence, a system message displays indicating the correspondence must be generated in the Web Correspondence module as shown in Figure 3-22. The example below is the first letter for the pending eligibility series.

Business rules for CMS Legacy Letters:

1. Letters in a series can be cancelled from CMS Legacy or Web Correspondence.
2. Letters in a series that need to be reissued, can be initiated from CMS Legacy by selecting the 'Re-issue Letter' option from the Action menu, but needs to be completed on Web Correspondence.
3. Associated ticklers must be updated according to the actions taken on the correspondence.
4. History of letters in a series must still be maintained on the CMS Legacy screens.
5. The 'Go back one status' option on the Action menu is equivalent to a cancellation.

CMS NET		PENDING ELIGIBILITY		Select One: <input checked="" type="radio"/> Save <input type="radio"/> Cancel <input type="button" value="[Quit]"/>	
Pt Nm: MUNKY, DRUNKN CURIOUS		CCS#: 3868103 CIN: 3065			
Gender: M DOB: 01/01/2007		Lgl Co: SACRAMENTO REG= ACTIVE			
Pgrm Begin Date: 01/01/2008		End: 07/01/2008		CCS Elig Status: 9K CCS	
Pending Elig Type: INTERVIEW PENDING		Pending Interview Type: ANNUAL			
Letter Type: MEDI-CAL		Interview Scheduled:		Time:	
Ltr Status: 1ST LETTER SENT		Interview Scheduled With:			
Interview Letter Cycle:					
Status:	Ltr Name:	Date Printed:	Corresp #:	Next Ltr Due:	
Pend					
Dt					
Dt					
Sta					
M/c					
Corr					
Last					

Correspondence Type C-38MS for Patient DRUNKN CURIOUS MUNKY needs to be completed and/or printed in the Web Correspondence module.

Go to Web Correspondence to complete the correspondence. Correspondence will remain in **INCOMPLETE** status.

(?) Press Enter

Figure 3-22, Incomplete status message in CMS Net Legacy

Below is a list of all the CMS Legacy screens where legacy correspondences can be generated. The system message instructing users to go to Web Correspondence module will appear on those screens.

Legacy Correspondence Screens:

1. CMSAS-10 – Application status
2. CMSCO-10 – is replaced by Web Correspondence
3. Correspondence Edit
4. CMSHMR-10 – Medical Records Request
5. CMSPE-20 – Pending Eligibility
6. CMSFE-10 – Enrollment / Assessment Fees
7. CMSRF-20 – Residential Worksheet
8. CMSFR-40 – Financial Worksheet
9. CMSPE-25 – Program Eligibility
10. CMSPT-10 – Pending Transfers
11. CMSCe-10 – Client Eligibility

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3.10.4 Completing an Incomplete Correspondence

Correspondences generated from CMS Legacy will have an incomplete status. Users can access the incomplete correspondence from the homepage or by using the 'View My' drop-list as displayed in Figure 3-23. Users may also use the correspondence search screen in Figure 3-4 and create their own search criteria.



Figure 3-23, Select Incomplete letters to complete

Figure 3-24 displays the incomplete first correspondence of the pending eligibility series. The status is incomplete. The correspondence cannot be printed or attached due to the incomplete status. Click on the correspondence description hyperlink to complete the correspondence process.

The screenshot shows the 'Children's Medical Services' web interface. At the top, there are navigation links for California Home, CDHS Home, CDHS Comments, CDHS Search, and CDHS Organization. The date is Tuesday, May 16, 2006. The main header includes the organization name and tagline, along with Contact Us, Help, and Logout links. Below this is a navigation bar with links for CCS Modules, Provider, Reports, Administration, and System Manager. A 'View My:' dropdown menu is set to 'Corresp-Incomplete (1)' with an OK button. The main content area is titled 'CORRESPONDENCE' and includes links for Search Correspondence, Send Free Text Correspondence, and Batch Correspondence. A 'Select Correspondence' section contains a table with the following data:

<input type="checkbox"/> Select All	CCS #	Client Name	Issued Dt	Corresp Type	Correspondence Description	Corresp #	Printed Dt	Sent To	Address	Issued By	Status
<input type="checkbox"/>	3868103	Munky, Drunkn	10/01/2007	C-38M	Miedi-Cal Ann Pgm Eliq #1	2007-270000		Mom Libre	8888 Freeway Blvd. #50 Sacramento, CA 95831	Phavisith, Sone	Incomplete

At the bottom of the table area, it says 'Found 1-1 out of 1 Matching Records'. Below the table are three buttons: Print, Attach, and Back. The 'Status' column for the single record is circled in red.

Figure 3-24, Incomplete correspondence list

Figure 3-25 displays the edit correspondence screen of the incomplete correspondence. After entering the necessary information in the free text field and selecting parties to courtesy copy (if applicable), click the 'Save' or 'Save & Print' buttons to complete the correspondence. The system will return to the correspondence search screen.

CORRESPONDENCE

[Search Correspondence](#) | [Send Free Text Correspondence](#) | [Batch Correspondence](#)

CORRESPONDENCE

Required fields are marked with *

CLIENT INFORMATION

Client Name:	DRUNKN CURIOUS MUNKY		
Alias:	MONKEY, BABY; MUNCEE, FURIOUS; MONKEY, BB; DONKEY, KONG; MISTY, MUNKY		
CCS Number:	3857064	Fin Elig Status:	ELIGIBLE
DOB:	01/01/2006	Res Elig Status:	ELIGIBLE
CI#:	34240141A9	Med Elig Status:	ELIGIBLE
Gender:	MALE	Diagnostic Only:	YES
County:	SACRAMENTO	CCS Elig Status:	9K CCS
		Reg Status:	ACTIVE
		Application Status:	NO ACTION
		PSA Status:	SIGNED
		Program Begin Date:	07/26/2006
		Program End Date:	07/25/2007

Edit Correspondence

Correspondence: C-38M MEDI-CAL ANN PRM ELIG #1

Effective Date:*

Citation:*

Addressed To: Mom Libre
Change 8888 Freeway Blvd
 Apt. 808
 Orange, CA 92862

Date Issued: 10/01/2007
Corresp #: 2007-270000
Auth #: _____
Date Printed: _____

Local Education Agency (LEA) Attn:

Enter Free Text:

NOA letter.

Number of Additional Copies: **Number of Spanish Copies:**

Courtesy Copy History

Name	Address	Dt Sent

Add / Edit

Other Details

Comments:

Comments will not display.

Approval Options

Request Approval From:*

Select

Notify Users:

Notify

Last Updated Date: 10/01/2007

Cancel
Save
Save & Print

Last Update By: Phavisith, Sone

Figure 3-25, Edit correspondence screen of Incomplete correspondence

Once the correspondence is complete, the system creates an automatic case note similar to the auto narrative created in CMS Legacy for each correspondence generated.

In the CMS Legacy system, the system displays the history of the first correspondence sent in the pending eligibility series as shown in Figure 3-26.

CMS NET	PENDING ELIGIBILITY	CMSCO-20
Pt Nm: MUNKY, DRUNKN CURIOUS CCS#: 3868103 CIN: 3065141A6		
Gender: M DOB: 01/01/2007 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E		
Pgrm Begin Date: 01/01/2008 End: 07/01/2008 CCS Elig Status: 9K CCS		
Pending Elig Type: INTERVIEW PENDING Pending Interview Type: ANNUAL		
Letter Type: MEDI-CAL Interview Scheduled: Time:		
Ltr Status: 1ST LETTER SENT Interview Scheduled With:		
Interview Letter Cycle:		
Status:	Ltr Name:	Date Printed:
1ST LETTER SENT	C-38M	10/01/2007
		Corresp #:
		2007-270000
		Next Ltr Due:
		10/16/2007
Pending Medi-Cal:		
Dt M/C Not Referred: Reason Not Referred:		
Dt M/C Agrment Signed: Dt M/C Appl Refused:		
Status Call Due: Dt Deter M/C No Compliant:		
M/C Appl Complete: Dt Self Declared:		
Comment:		
Last Update By: PHAVISITH, SONE		Date: 04/11/2008

Figure 3-26, History of first letter in a series

The process of generating and completing the second and third correspondence in a series is the same as the first. Figure 3-27 displays the history of the second correspondence sent.

CMS NET		PENDING ELIGIBILITY		CMSCO-20	
Pt Nm: MUNKY, DRUNKN CURIOUS CCS#: 3868103 CIN: 3065141A6					
Gender: M DOB: 01/01/2007 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E					
Pgrm Begin Date: 01/01/2008		End: 07/01/2008		CCS Elig Status: 9K CCS	
Pending Elig Type: INTERVIEW PENDING		Pending Interview Type: ANNUAL			
Letter Type: MEDI-CAL		Interview Scheduled:		Time:	
Ltr Status: 3RD LETTER SENT/NOA Interview Scheduled With:					
Interview Letter Cycle:					
Status:	Ltr Name:	Date Printed:	Corresp #:	Next Ltr Due:	
1ST LETTER SENT	C-38M	10/01/2007	2007-270000	10/16/2007	
2ND LETTER SENT	C-38MA	10/16/2007	2007-270001	11/01/2007	
3RD LETTER SENT	C-38MA	11/01/2007	2007-270002		
Pending Medi-Cal:					
Dt M/C Not Referred:		Reason Not Referred:			
Dt M/C Agrment Signed:		Dt M/C Appl Refused:			
Status Call Due:		Dt Deter M/C No Compliant:			
M/C Appl Complete:		Dt Self Declared:			
Comment:					
Last Update By: PHAVISITH, SONE				Date: 04/11/2008	

Figure 3-27, History of the completed letters generated in a series

3.10.5 Notice of Action Process

Figure 3-28 displays the selection to generate the NOA in the client eligibility screen. Previously, the CMS Legacy system allowed the user the option to generate either an NOA or MC 2134 correspondence. With this new project and change in policy, both letters are required to be generated for case closure or denial. In the example below, the system displays the new message to generate the NOA and MC 2134 correspondence.

CMS NET		CLIENT ELIGIBILITY		CMSCE-10																	
Pt Nm: MUNKY, DRUNKN CURIOUS CCS#: 3868103 CIN: 3065141A6																					
Gender: M DOB: 01/01/2007 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E																					
Pgrm Begin Date: 01/01/2008		End: 07/01/2008		CCS Elig Status: 9K CCS																	
Case Status: CLOSED		Case Type: NEW		Date Open: 01/22/2007																	
CCS Elig Status: 9K CCS				County: SACRAMENTO																	
Elig Start Date: 10/01/2007		Date Closed: 10/01/2007		Date Denied:																	
Future Closure Date:																					
Reason Closed/Denied: NO TREATMENT INDICATED AT THIS TIME																					
Determined By: Phavisith, Sone				Date Determined: 10/01/2007																	
Comment:																					
<table border="1" style="width: 100%;"> <tr> <td colspan="2">Would you like to generate NOA / MC2134?</td> <td>Dt</td> <td>Reason/Closed Denied</td> </tr> <tr> <td><input checked="" type="checkbox"/> Yes</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> No</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="2">[Quit]</td> <td></td> <td></td> </tr> </table>						Would you like to generate NOA / MC2134?		Dt	Reason/Closed Denied	<input checked="" type="checkbox"/> Yes				<input type="checkbox"/> No				[Quit]			
Would you like to generate NOA / MC2134?		Dt	Reason/Closed Denied																		
<input checked="" type="checkbox"/> Yes																					
<input type="checkbox"/> No																					
[Quit]																					

Figure 3-28, Generate third letter / Notice of Action

If the user selects to generate the NOA, the system will display the message to complete the correspondence process in the Web Correspondence module as displayed in Figure 3-29.

CMS NET	CLIENT ELIGIBILITY	CMSCE-10
Pt Nm: MUNKY, DRUNKN CURIOUS CCS#: 3868103 CIN: 3065141A6		
Gender: M DOB: 01/01/2007 Lgl Co: SACRAMENTO REG= ACTIVE MED= E F/R= E		
Pgrm Begin Date: 01/01/2008	End: 07/01/2008	CCS Elig Status: 9K CCS
Case Status: CLOSED	Case Type: NEW	Date Open: 01/22/2007
CCS Elig Status: 9K CCS		County: SACRAMENTO
Elig Start Date: 10/01/2007	Date Closed: 10/01/2007	Date Denied:
Future Closure Date:		
Reason Closed/Denied: NO TREATMENT INDICATED AT THIS TIME		
Determined By: Phavisith, Sone		Date Determined: 10/01/2007
Comment:		
<p>Correspondence Type NOA for Patient DRUNKN CURIOUS MUNKY needs to be completed and/or printed in the Web Correspondence module.</p> <p>Go to Web Correspondence to complete the correspondence. Correspondence will remain in INCOMPLETE status.</p> <p>(?) Press Enter</p>		
		1/2008

Figure 3-29, Generate NOA / MC 2134

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Figure 3-30 displays the incomplete NOA. Click the correspondence description hyperlink to access it.

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization | Tuesday, May 16, 2006

Children's Medical Services

Caring for Children with Special Medical Needs...

Contact Us | Help | Logout

CCS Modules | Provider | Reports | Administration | System Manager | View My: Corresp-Incomplete (1) OK

CORRESPONDENCE

Search Correspondence | Send Free Text Correspondence | Batch Correspondence

Select Correspondence

<input type="checkbox"/> Select All	CCS #	Client Name	Issued Dt	Corresp Type	Correspondence Description	Corresp #	Printed Dt	Sent To	Address	Issued By	Status
<input type="checkbox"/>	3868103	Munky, Drunkn	10/01/2007	NOA	Notice of Action	2007-270003		Mom Libre	8888 Freeway Blvd. #50 Sacramento, CA 95831	Rundall, Julie	Incomplete

Found 1-1 out of 1 Matching Records

Print Attach Back

Figure 3-30, Select incomplete NOA

Figure 3-31 displays the incomplete NOA which requires approval before being complete. The effective date and citations are required fields for NOAs and denial letters. At the bottom of the screen, the approval options are displayed because the letter requires approval.

CORRESPONDENCE

Search Correspondence | Send Free Text Correspondence | Batch Correspondence

CORRESPONDENCE

Required fields are marked with *

CLIENT INFORMATION

Client Name:	DRUNKN CURIOUS MUNKY	Fin:	MUNKY	Status:	ACTIVE
Alias:	MONKEY, BABY; MUNCEE, FURI	Rel:		ion Status:	NO ACTION
CCS Number:	3857064	Me:		us:	SIGNED
DOB:	01/01/2006	Dis:		Begin Date:	07/26/2006
CIH:	34240141A9	CCS Elig Status:	9K/CCS	Program End Date:	07/25/2007
Gender:	MALE				
County:	SACRAMENTO				

Edit Correspondence

Correspondence: NOA NOTICE OF ACTION

Effective Date:* 10/01/2007

Citation:* MISC3 NO ACTIVITY / SERVICES

Addressed To: Mom Libre
8888 Freeway Blvd
 Apt. 808
 Orange, CA 92862

Local Education Agency (LEA) Attn: _____

Date Issued: 10/01/2007

Corresp #: 2007-270000

Auth#: _____

Date Printed: _____

Enter Free Text:

NOA le

Select Approvers

Select All

- Notify, User I
- Surrogate, User
- Monday, User
- Assignee ET, William
- Brows, Fuzzy

Done

Approval Options

Request Approval From:*
Paul, Yolonda; Phelps, Mary Lou; White, Bill; Monday, User

Notify Users:
Seddouki, Samantha; Washington, Brenda

Last Updated Date: 10/01/2007

Cancel
Save
Save & Print

Last Update By: Phavisith, Sone

Figure 3-31, Complete NOA that requires approval

If the Creator of the letter is also a designated approver, the system will skip the approval process.

Click the 'Select' button to bring up a pop up screen of the designated Approvers. Place a check mark next the names of the Approvers to request approval from them as shown in Figure 3-32, then click 'Done'.

CORRESPONDENCE
Required fields are marked with *

CLIENT INFORMATION

Client Name: DRUNKN CURIOUS MUNKY
Alias: MONKEY, BABY; MUNCEE, FUR...
CCS Number: 3857064
DOB: 01/01/2006
CIB: 34240141.A9
Gender: MALE
County: SACRAMENTO
MUNKY
Status: ACTIVE
Application Status: NO ACTION
Status: SIGNED
Program Begin Date: 07/26/2006
Program End Date: 07/25/2007
CCS Elig Status: 9K/CCS

Edit Correspondence

Correspondence: NOA NOTICE OF ACTION
Effective Date: * 10/01/2007
Citation: * MISC3 NO ACTIVITY / SERVICES

Addressed To: Mom Libre
8888 Freeway Blvd
Apt. 808
Orange, CA 92862
Date Issued: 10/01/2007
Corresp #: 2007-270000
Auth#: _____
Date Printed:

Local Education Agency (LEA) Attn:

Enter NOA le

Select Approvers

Select All

- Notify, User I
- Surrogate, User
- Monday, User
- Assignee ET, William
- Brows, Fuzzy

Done

Number of Spanish Copies: 1

Other De

Comm
Comm

Approval Options

Request Approval From: *
Select: Paul, Yolonda; Phelps, Mary Lou; White, Bill; Monday, User

Notify Users:
Notify: Seddouki, Samantha; Washington, Brenda

Figure 3-32, Select Approvers

The Approvers were designated in the User Security Module. See section 3.9 for reference.

Use the 'Notify' button to select users to notify by location as shown in Figure 3-33. Notifying other users is optional and there is no restriction to who can be notified. Designated approvers can approve letters regardless if they received a direct request for approval or are just notified.

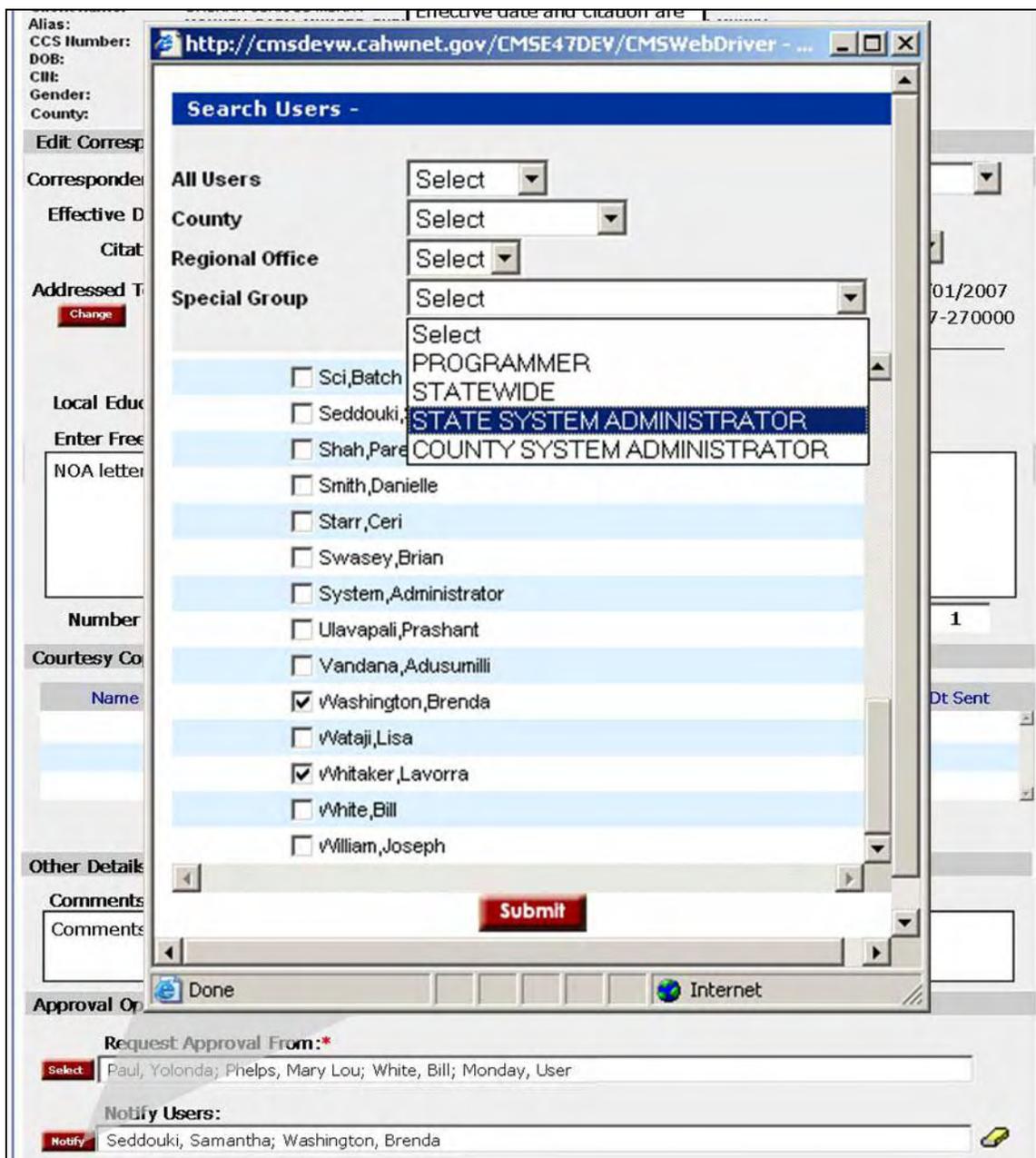


Figure 3-33, Notify Other Users

After clicking 'Save' or 'Save & Print', the system displays a new Web message with a pre-entered subject line and attachment of the correspondence. The Recipients are the Approvers and Notified users. Free text can be entered in the body of the message. After

Web Correspondence

sending, a system message displays confirming the letter has been submitted for approval as shown in Figure 3-34. The user is forced to send the Web message.

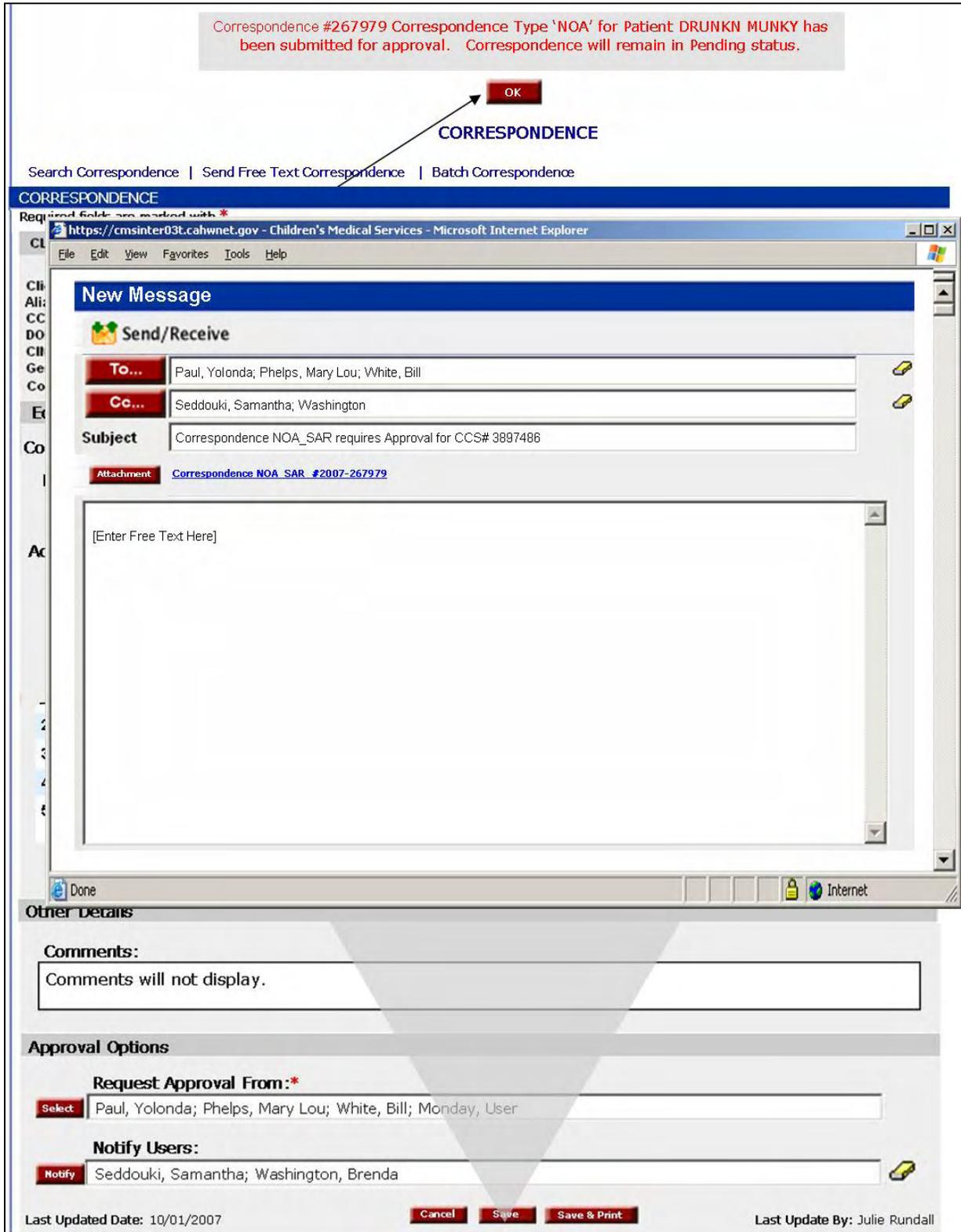


Figure 3-34, Approval Confirmation Message

Web Correspondence

The following events will occur if the letter is **submitted for approval**:

1. Force the user to send a Web message to the Approver requesting approval for the pending correspondence.
2. Save an automatic case note detailing the Creator had requested an approval for a correspondence from the Approver(s) with today's date, specifying correspondence type, and correspondence number.

New Subject is added to the Case Notes subject table and the template displays as:

Date: [Today's Date]
Subject Code: Corresp-RequestApproval
Description: Correspondence Approval Requested
Entered by: [Creator name]
Narrative: Request to approve [correspondence type + correspondence description] has been submitted to:
[Approver name]
[Approver name]

3. The letter will appear on the Pending Correspondence List.

3.10.6 Correspondence – Waiting Approval list

There is a new list that tracks all pending correspondences that are waiting approval. The Creator can access his/her list of pending letters by using the 'View My' drop down list located at the top right of Figure 3-35. Select the 'Corresp-Waiting Approval' option to view the correspondences. The number in parentheses is a count of all the correspondences submitted for approval by the Creator. Correspondences that have the 'Submit for Approval' status for longer than three days displays in red font as displayed by the last correspondence listed.

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization Tuesday, May 16, 2006

Children's Medical Services
Caring for Children with Special Medical Needs... Contact Us | Help | Logout

CCS Modules | Provider | Reports | Administration | System Manager View My: Corresp-Waiting Approval (7) OK

CORRESPONDENCE

Search Correspondence | Send Free Text Correspondence | Batch Correspondence

Correspondence—Waiting Approval

<input type="checkbox"/> Select All	CCS #	Client Name	Issued Dt	Corresp Type	Correspondence Description	Corresp #	Printed Dt	Sent To	Address	Issued By	Status
<input type="checkbox"/>	3857064	Munky, Drunkn	10/01/2007	NOA	Notice of Action	2007-270003		Momma Monkey	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	Submit for Approval
<input type="checkbox"/>	3857064	Munky, Drunkn	9/30/2007	C-36HF	Application Ltr—Healthy Fam #1	2007-268497	11/10/2007	Momma Monkey	8888 Freeway Blvd. #201 Sacramento, CA 95899	Rundall, Julie	Submit for Approval
<input type="checkbox"/>	3868101	Libre, Nacho	9/30/2007	PSA-CORR	Program Services Agreement (Spanish) - Correspondence Screen	2007-268394	07/30/2007	Mom Libre	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	Submit for Approval
<input type="checkbox"/>	3868101	Libre, Nacho	9/30/2007	C-71	Cancel Authorization Correspondence Spanish	2007-268334	09/13/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Rundall, Julie	Submit for Approval
<input type="checkbox"/>	4000009	Prime, Optimus	9/29/2007	C-73	Authorization Cover Correspondence—Distribution Spanish	2007-268311	09/10/2007	Mom Prime	8888 Freeway Blvd. #50 Sacramento, CA 95899	Rundall, Julie	Submit for Approval
<input type="checkbox"/>	4000009	Prime, Optimus	09/29/2007	NOA	Notice of Action Spanish	2007-267960	11/10/2007	Mom Prime	8888 Freeway Blvd. #201 Sacramento, CA 95899	Rundall, Julie	Submit for Approval
<input type="checkbox"/>	T467429	Megatron, Omega	09/27/2007	C-72	Deny Request for Service Spanish	2007-267959	12/08/2007	Oriente, Steven D MD	17100 Strong Arm Ave. #201 Irvine, CA 92614	Rundall, Julie	Submit for Approval

Found 1-7 out of 45 Matching Records Print Attach Back Next 25 Records>>

Figure 3-35, List of Letters that are waiting for approval

This list can be very useful when the Creator generates many letters that require approval from different Approvers. For example, Approvers may not respond in a timely manner, so the Creator can reference this list and contact the Approver regarding the pending letter. Correspondences with the 'Submit for Approval' status cannot be printed or attached. They can however, be edited or cancelled.

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3.10.7 Approve Correspondence

When a letter has been submitted for approval, the system sends an automatic Web message to the designated Approver(s). Figure 3-36, it displays the automatic Web Message sent to User Surrogate (Approver) from Julie Rundall (Creator).

CMS WEB MESSAGES

WEB MESSAGES

New [Print] [Close] Reply Reply to All Forward Send/Receive Move To Folder

INBOX for User Surrogate

RECEIVED	FROM	SUBJECT	COUNTY
10/01/2007 10:00 AM	Rundall, Julie	<u>Correspondence NOA_SAR #2007-267979 requires Approval for CCS# 3897486</u>	Sacramento
05/15/2007 09:59 AM	Rundall, Julie	<u>Christmas Party</u>	Sacramento
05/14/2007 09:45 AM	Thomas, Jeffery	<u>FW: CCS# 3347637 Program Eligibility Change</u>	Placer
05/13/2007 09:40 AM	Phavisith, Sone	<u>RE: CCS# 3872637 Aide Code Change</u>	Shasta
05/10/2007 09:39 AM	Jones, Arthur	<u>CCS# 3288457 Case Status Change</u>	Solano
05/10/2007 08:45 AM	Payne, Rebecca	<u>CCS# 3284875 Narrative Edits</u>	Sonoma
05/08/2007 08:42 AM	Wilson, Wade	<u>Cancelled Case</u>	Sutter
05/07/2007 08:41 AM	Williams, Troy	<u>Transferring CINs and linking</u>	Ventura
05/05/2007 08:40 AM	Buckley, Jesse	<u>Current Legal County</u>	San Diego
05/04/2007 07:45 AM	James, Torrance	<u>CCS# 3265488 Case Transfer</u>	Riverside
05/04/2007 07:44 AM	Lewis, Leonard	<u>SAR 98737483 Reject</u>	Pasadena
04/30/2007 07:41 AM	Christiansen, Stacey	<u>Missing Registration Information</u>	Orange

Automatic Web Message regarding correspondence

Figure 3-36, Web Message is sent to the Approver

All Web messages will have a template subject line which follows the format:

“Correspondence” <correspondence type> <correspondence number> “requires Approval for CCS# “<CCS number>.”
 <Correspondence type> and <CCS> are fields values and will change based on the letter sent. Click the subject hyperlink to read the Web message.

Figure 3-37 displays the opened message. Attached to the letter is a hyperlink that will bring up the edit correspondence screen.

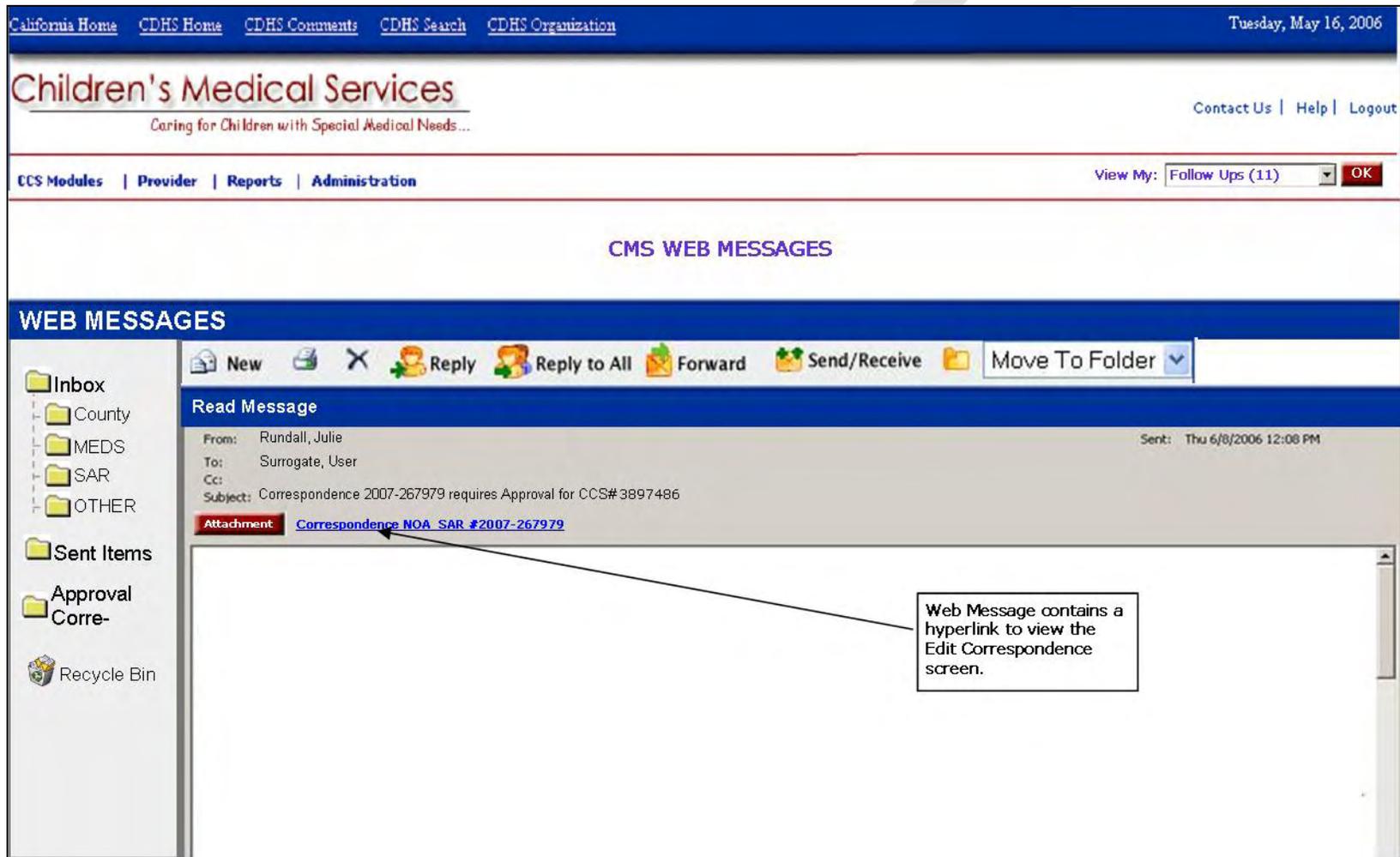


Figure 3-37, Click Hyperlink to View the Edit Correspondence Screen

Figure 3-38 displays the pop-up screen of the correspondence. If the correspondence status is 'Submit for Approval' and the user is one of the listed Approvers, then the system displays the 'Approve' and 'Deny' buttons.

The Approver has the option to edit the letter; however, the system will still consider the Creator as the one whom generated it. If there are any issues with the letter, the Approver is accountable.

The screenshot shows a web application interface for handling correspondence. On the left is a navigation menu with options like 'California Home', 'CFRT Home', 'CFRT Comments', 'CFRT Search', and 'CFRT Organizations'. Below this is the 'Children's Medical Services' logo and a 'WEB MESSAGES' section with an 'Inbox' and 'Sent Items' list. The main content area is titled 'CORRESPONDENCE' and contains 'CLIENT INFORMATION' for a client named 'DRUMON CURIOUS MUNKY'. Below this is a 'Print Display' section showing a 'NOTICE OF ACTION' from 'California Children's Services'. The notice details the denial of CCS program eligibility for 'MOTHER LIBRE' due to an incomplete Medi-Cal application process. At the bottom of the screen, there are several buttons: 'Edit', 'Cancel Correspondence', 'Print', 'Attach', 'Back', and 'Approve' and 'Deny'. The 'Approve' and 'Deny' buttons are circled in red, and a callout box points to them with the text: 'The Approve and Deny buttons will appear if the correspondence status is 'Submit for Approval' and the current user is one of the listed Approvers.'

Figure 3-38, Click Hyperlink to Approve or Deny

Web Correspondence

The following events will occur if the correspondence is **approved**:

1. Create option to send Web message to the Creator and notified users indicating the pending letter has been approved. The Approver is forced to send the Web message. The Web message will contain an attachment of the correspondence.
2. Save an automatic case note detailing the approval action of the letter, who performed it, and today's date

New Subject is added to the Case Notes subject table and the template displays as:

Date: [Today's Date]
Subject Code: Corresp-Approved
Description: Correspondence Approved
Entered by: [Approver name]
Narrative: [correspondence type + correspondence description] has been approved by [Approver name]

3. Execute the 'Save and Print' function - bring up a print display of the approved letter (pop up screen) to print
4. Change the correspondence status to *Approved*

The following events will occur if the letter is **denied**:

1. Create option to send Web message to Creator indicating the pending letter has been denied. The Approver is forced to send the Web message. The Web message will contain a hyperlink to the correspondence.
2. Save an automatic case note detailing the denial action, who performed it, and today's date

New Subject is added to the Case Notes subject table and the template displays as:

Date: [Today's Date]
Subject Code: Corresp-ApprovalDenied
Description: Correspondence – Approval Denied
Entered by: [Approver name]
Narrative: [correspondence type + correspondence description] has been denied by [Approver name]

3. Change the pending letter status to *Deny Approval*

The Web message will contain a hyperlink to the edit correspondence screen where the Creator has the option to make necessary edits then resubmit for approval or cancel the correspondence.

Web Correspondence

Figure 3-39 displays the Web message sent to the Creator indicating the letter has been approved.

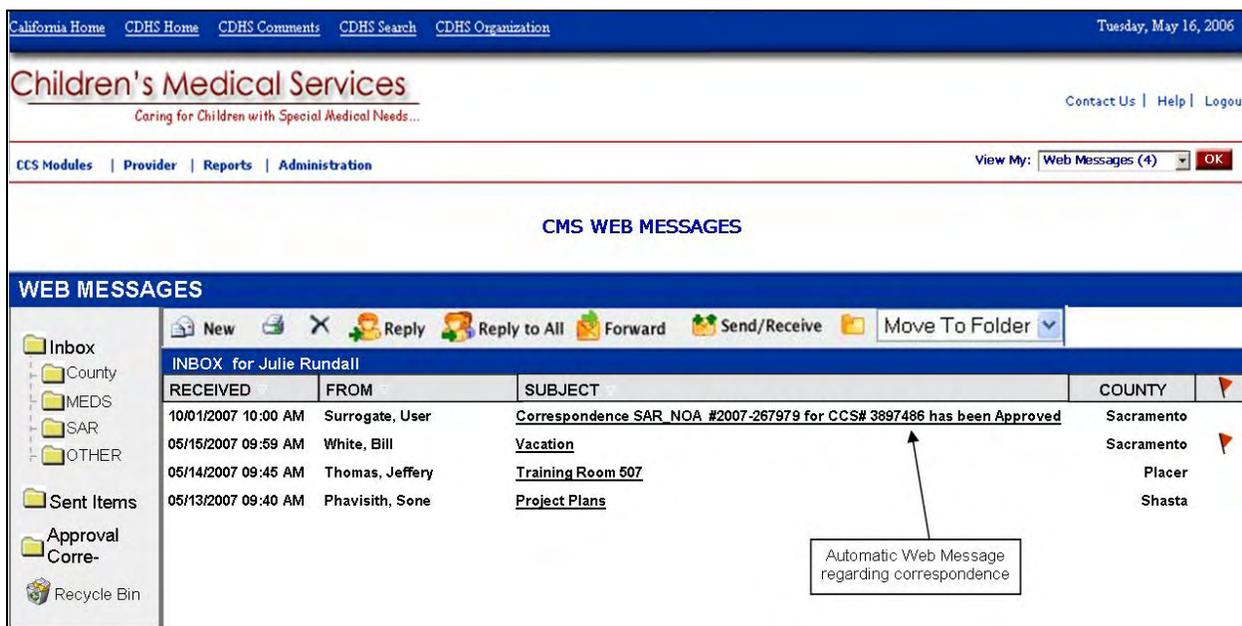


Figure 3-39, Automatic Web Message after Approval

Figure 3-40 displays the opened Web message with the hyperlink to view a print display of the approved correspondence.

Creator (Julie Rundall) opens the Web Message sent from the Approver (User Surrogate).

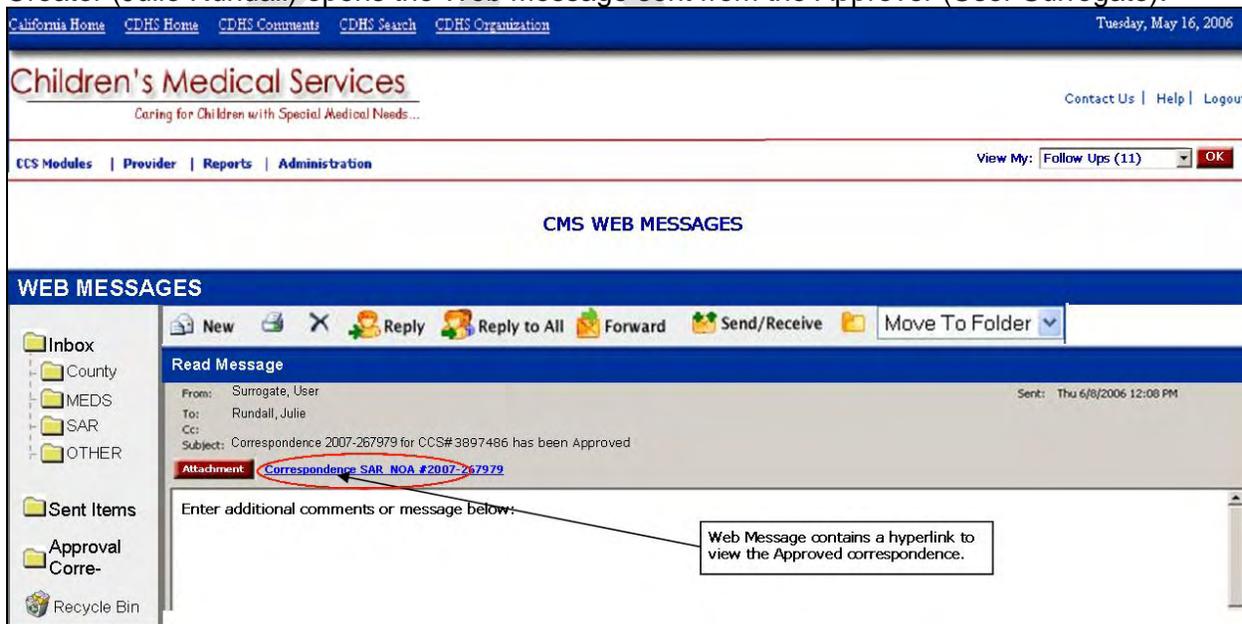


Figure 3-40, Read Approval Web Message

Figure 3-47 displays the approved correspondence when clicking the hyperlink. The correspondence buttons are available to use.

There are two new fields that have been added which indicate the name of the Creator and Approver at the bottom of the letter.

The date on the letter is the same date of when the letter was first generated by the Creator. It remains static throughout the approval process.

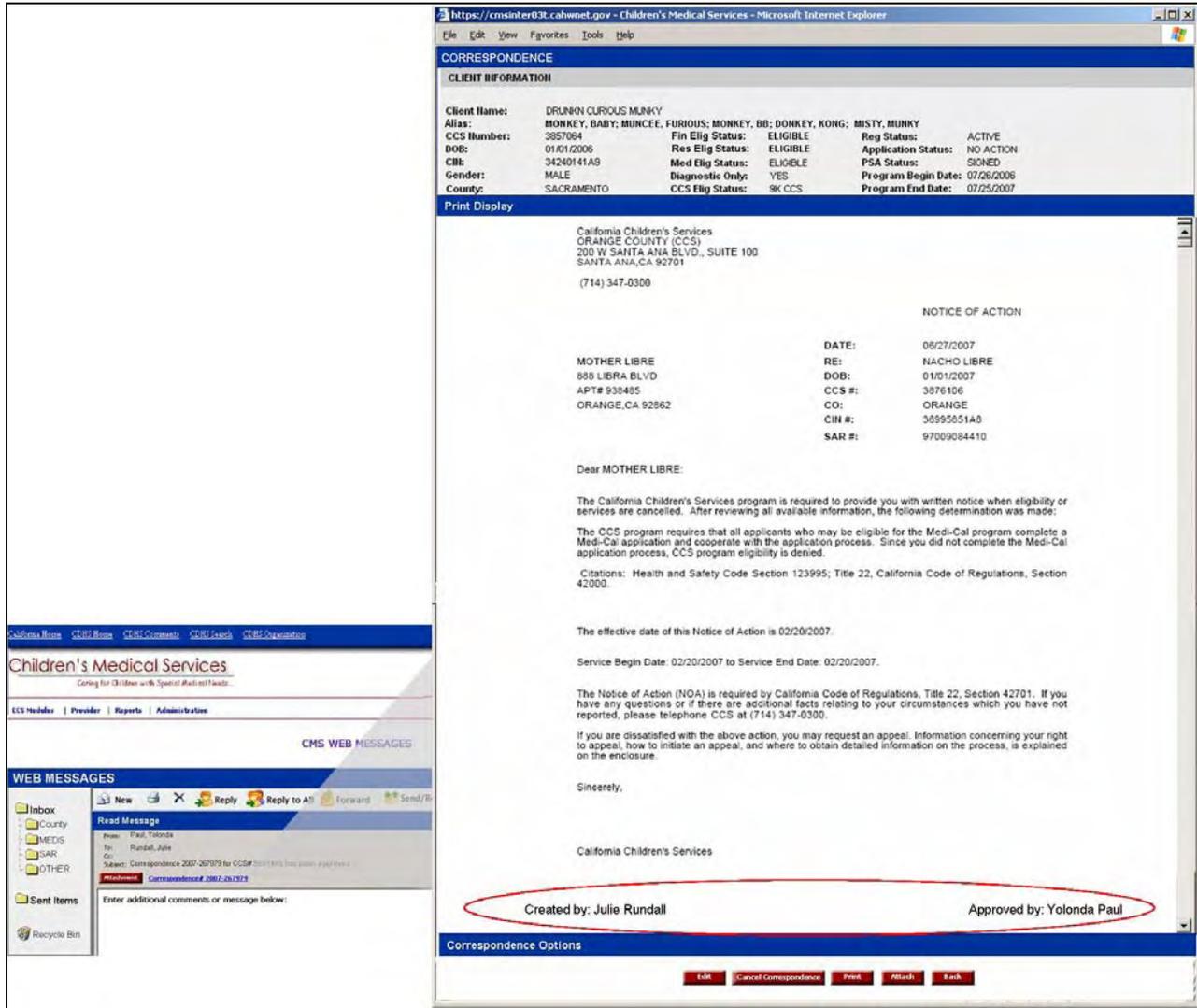


Figure 3-41, Print / Display Approved Letter

3.11 FAMILY VOICES PROJECT

The following Family Voices Letters are included for this SMCR:

1. NOA_Case_Mgmt Notice of Action (Case Management)

This Notice of Action (NOA) is used when a case is closed or denied. This template is used for all denial/cancellation reasons for the case. It will replace all existing NOAs in CMS Legacy.

Legal County Information Here

[Date]

[Primary Addressee]
[Primary Addressee's Address]
[City], CA [ZIP Code]

Child's Name: [Child Name]
Birth Date: [Birth Date]
CCS: [Client Number]
CIN#: [Client Index Number]
County: [County Name]

NOTICE OF ACTION

Dear Mr. and Mrs. [Last Name],

This is a Notice of Action. We call it NOA for short. This NOA is to tell you that **[Child Name]'s California Children's Services (CCS) will end on: [Date].**

This will not affect [Child Name]'s Medi-Cal benefits or Medical Therapy Program benefits.

Your child's health is important to us, but you have not met CCS program requirements, therefore, CCS eligibility cannot be approved.

[Insert Denial Reason/Citation here]:

[Free text]

If you disagree with this decision, you may appeal. The deadline to appeal is [date], which is 30 days this NOA. Read the enclosed information to learn more about your right to appeal.

If you have questions, or would like to give us more information, please call [Caseworker Name] at [Legal County] County CCS office at [County Office Phone Number].

Sincerely,

California Children's Services

This NOA is required by California Code of Regulations, Title 22, Section 42701.

Case Management NOA

Figure 3-42, NOA for case management closure or denial

2. NOA_SAR Notice of Action (SAR)

This Notice of Action (NOA) is used when medical service(s) is cancelled or denied. This template is used for all denial/cancellation reasons on SARs except when the denial/cancellation reason is when the provider refuses or terminates medical services. That's when the only denial letter is issued instead. This NOA version is generated from the SAR system.

County Information Here

[Date]

[Primary Addressee] [Primary Addressee Address] [City], CA [ZIP Code]	Child's Name: [Child Name] Birth Date: [Birth Date] CCS: [Client Number] CIN#: [Client Index Number] County: [County Name] Provider: [Provider Name]
--	---

NOTICE OF ACTION (NOA)

This is a Notice of Action. We call it NOA for short. It tells you about the decision California Children's Services (CCS) made in your case to deny/cancel the following CCS services for your child.

Effective Date:	[list here]
Service Begin and End Date:	[list here] - [list here]
Service Requested:	[list here]
Reason/Citation:	[list here]

[Free Text]

If you disagree with this decision, you may appeal. The deadline to appeal is [date], which is 30 days from the effective date of this NOA. Read the enclosed information to learn more about your right to appeal.

If you have questions, or would like to give us more information, please call **[Caseworker Name]** at **[Name of Legal County]** County CCS office at **[County Office Phone Number]**.

Sincerely,

California Children's Services

Included with this letter:
How to Appeal

We sent a copy of this letter to:
[Provider Name]

SAR_NOA_Deny_Appeal, page 1 of 2

Figure 3-43, NOA for SAR cancellation or denial

3. Denial_Letter Denial Letter (SAR)

This denial letter is used when medical service(s) is cancelled or denied because the provider refused or terminated medical services. This is the only time a denial letter is issued.

County Information Here

[Date]

[Primary Addressee]
[Primary Addressee's Address]
[City], CA [ZIP Code]

Child's Name: [Child Name]
Birth Date: [Birth Date]
CCS: [Client Number]
CIN#: [Client Index Number]
County: [County Name]
Provider: [Provider Name]

Denial Letter

California Children's Services (CCS) is unable to approve the following SAR Authorization # [list SAR # here] received for [Child's name] for the reason listed below:

Effective Date: [list here]
Service Begin and End Date: [list here] - [list here]
Service Requested: [list here]
Reason/Citation: The provider has ended / terminated medical services.

[Free Text]

If you have questions, or would like to give us more information, please call [Caseworker Name] at [Name of Legal County] County CCS office at [County Office Phone Number].

Sincerely,

California Children's Services

Included with this letter:
How to Appeal

We sent a copy of this letter to:
[Provider Name]

Denial_Letter_Appeal, page 1 of 2

Figure 3-44, Denial Letter for SAR

4. Appeal Rights

All NOAs will have appeal rights information enclosed - the denial letter will not.

[County Information Here](#)

How to Appeal

What is an appeal?
An appeal is a way to ask us to reconsider our decision. The parent, the applicant, the legal guardian or an authorized representative can ask for an appeal.

How do I ask for an appeal?
The CCS Family Handbook has more information about appeals.
Send us a letter asking for an appeal. In your letter say why you disagree with the NOA. If you want to continue the services your child is getting now, say that in your letter.

Is there a deadline?
Yes. We must receive your appeal within 30 calendar days of the date on the attached NOA letter.

Can CCS help me with my appeal?
Yes. If you have questions or need help, contact your county's CCS office:
[CCS Representative Name]
[Street Address]
[City, CA, ZIP]
Phone: [Phone #]
Fax: [Fax #]

CCS can also let you see your child's CCS file and medical records.

For more information, contact:
Family Resource Center
1-800-515-BABY
Or look for your local Resource Center at:
www.familyvoicesofca.org

Parent Training & Information Center
www.cde.ca.gov/sp/se/qa/caprntorg.asp

Where can I learn about the laws for appeals?
See the California Code of Regulations, Title 22, Art. 2, Sections 42702 and 42703.
You can read the law at:
<http://ccr.oal.ca.gov>

Where do I send my appeal?
Mail or deliver your appeal to:
[County CCS Office]
[CCS Administrator]
[Street Address]
[City, CA, ZIP]

Keep a copy of the appeal for your records.

When will my appeal be decided?
We will send you a copy of the decision on your appeal within 20 days.

Denial_Letter_Appeal, page 2 of 2

Figure 3-45, Appeal rights instructions

3.12 REMOVE OPTION TO SELECT NOA OR LETTER ON SAR

For this SMCR, the ability to select a NOA or denial letter when a SAR is being cancelled or denied is removed. The system selects NOA or denial letter depending on the denial/cancellation reason. 'NOA' and 'Letter' radio buttons are removed as shown in Figure 3-46.

Cancel SAR

NACHO LIBRE, 3868101
AUTHORIZED, SAR ID 97010492850

Required fields are marked in *

CLIENT INFORMATION

Client Name:	NACHO LIBRE	F/R Elig:	ELIGIBLE	Reg Status:	ACTIVE
Alias:		Med Elig Status:	ELIGIBLE	Application Status:	
CCS Number:	3868101	Diagnostic Only:	NO	PSA Status:	SIGNATURE PENDING
DOB:	01/01/2007	CCS Elig Status:	9K CCS	Program Begin Date:	01/01/2008
CIH:	32481471.A0	County:	SACRAMENTO	Program End Date:	07/01/2008
Gender:	FEMALE				

PROVIDER INFORMATION

Provider Name: JOHNSON, MILLARD E	Provider Number: 00A627870
Provider Type: PHYSICIAN	
Address 1 * <input type="text" value="600 COFFEE RD"/>	Address 2 <input type="text"/>
City * <input type="text" value="MODESTO"/>	County <input type="text" value="Stanislaus"/>
State * <input type="text" value="CA"/>	Zip * <input type="text" value="95355-4201"/> <input type="button" value="find"/>
Phone No. <input type="text" value="209"/> - <input type="text" value="524"/> <input type="text" value="1211"/>	

SAR INFORMATION

SAR Number: 97010492850	Request Date: 10/01/2007
Service Begin Date: 10/01/2007	Service End Date: 04/04/2008
No Of Days: 187	State Funded: N
EPSDT-SS: N	CCS-SS: N

SAR CANCELLATION INFORMATION

~~Correspondence~~ NOA LETTER

Canceled By *

Date Canceled April 12, 2008

Reason for Cancellation *

Citation *

Cancellation Letter Text

DISTRIBUTION

NONE FAMILY PACIFICARE LIBRE,NACHO	<input type="button" value="Add Distribution"/>
---	---

The system will automatically select NOA or denial letter depending on the denial/cancellation reason. 'NOA' and 'Letter' radio buttons will be removed.

Figure 3-46, Remove option to select NOA or Letter on SAR

3.13 LETTER MAINTENANCE AND TEMPLATES

Maintenance and changes to letters must be requested through the programmers. The available options to create the templates are to use MS Word with the Mail Merge feature.

3.14 ADDITIONAL ITEMS

The following is a list of things that are still a part of this SMCR but not necessary to specify in this document.

1. All CMS Legacy letters are typed in MS Word format
2. The consolidated denial/cancellation reasons are matched to their respective text used in the correspondences

DRAFT