Authorized Representative and Additional Correspondence Recipients - Manage

Purpose

The purpose of this job aid is to provide instructions on how to manage Authorized Representatives and/or additional Correspondence Recipients.

Authorized Representative and Additional Correspondence Recipients

Authorized Representatives are persons or Resources authorized by Customers to act on their behalf regarding their case. You may add and update Authorized Representatives by selecting one of the following:

- Case Person – A person associated to the case that may or may not be an applicant member
- Non-Case Person – A person not associated to the case
- Resource – A person or organization that is a Resource in the Resource Databank (RDB)

Authorized Representatives may be assigned for the following programs:

- CalFresh
- CAPI
- CalWORKs
- General Relief
- Medi-Cal
- RCA

When adding Authorized Representatives, you may indicate if the persons/Resources are also Additional Correspondence Recipients. However, at this time there is no automation connected to this field until further notice.

Authorized Representative List Page

The Authorized Representative List page displays all the Authorized Representatives for the case, including the program(s) and effective dates. For the Medi-Cal program Authorized Representatives, hovering over the underlined program provides a quick view of the authority level for the Authorized Representative. Authorized Representatives and Additional Correspondence Recipients are managed from the Authorized Representative List page. From this page, you may access the Authorized Representative Detail page.

To access the **Authorized Representative List** page, follow these steps:

Step	Action
1.	Place the cursor over **Case Info** or **Eligibility** on the **Global** navigation bar.
2.	Select **Case Summary** from the **Local** navigator.
3.	Select **Authorized Representative** in the **Task** navigation bar.

Authorized Representative Detail Page

The Authorized Representative Detail page displays information about the person/Resource. In Add mode, the page displays different fields depending on the selection in the Type drop list on the Authorized Representative List page. This page allows more than one Authorized Representative for a program at the same time.

To access the **Authorized Representative Detail** page, follow these steps:

Step	Action
1.	On **Authorized Representative List** page, a) Select <**Person Type**> from **Type** drop list. b) Click <**Add**> to navigate to **Authorized Representative Detail** page.

If there is an existing Authorized Representative, you can click the Name hyperlink to access the Authorized Representative Detail page in View Mode.

Authorized Representative Program Detail Page

The Authorized Representative Program Detail page displays the Authorized Representative's details for the program selected on the Authorized Representative Detail page.

For CalFresh Authorized Representatives, the Report to MEDS drop list is required and only a single active CalFresh Authorized Representative information will be sent to MEDS.

For Medi-Cal Authorized Representatives who are Additional Correspondence Recipients, the LTC MC RE Packet Recipient drop list is required. Because the LTC MC RE Packet no longer exists, the System will not send out any packet to the Authorized Representative. This field will be removed from the page at a later time.

Adding a Case Person Authorized Representative

When adding an Authorized Representative who is already associated with the case, you do not need to enter the person's address and contact information. Instead, you click the Retrieve Information button to display the person's address and contact information.

The selection in the Use Person Address drop list determines if the displayed address is used. The available selection options are Yes and No.

- If you save the record with Yes selected from the Use Person address drop list, when you add or edit the person's address from the Contact Summary page, the System updates the Authorized Representative record with the new address.
- You can select No from the Use Person Address drop list, but you will need to add an address. If you save the record with No selected from the Use Person address drop list, when you add or edit the person's address from the Contact Summary page, the address information for the Authorized Representative record will not be updated with the address information entered on the Contact Summary page. You will need to navigate to the Authorized Representative edit the record with the updated address information.

The following steps assumes you are in the context of a case, with the authorized representative you wish to add already associated to that case.

Step	Action
1.	On the **Authorized Representative List** page: a) Select **Case Person** from the **Type** drop list. b) Click the **Add** button.
2.	On the **Authorized Representative Detail** page: a) Select the **<Person>** from the **Name** drop list. b) Click the **Retrieve Information** button to display **Case Person** information
3.	In the **Program Information** section: a) Select **<Program>** from the **Program** drop list. b) Click the **Add** button.
4.	On the **Authorized Representative Program Detail** page: a) Select the **<Yes>** or **<No>** from the **Additional Correspondence Recipient** drop list.

	b) Select **<No>** from the **LTC MC RE Packet Recipient** (Medi-Cal - only displays when the Yes option is selected from the Additional Correspondence Recipient drop list) or the **Report to MEDS** (CalFresh) drop list. c) Enter a **<Date>** in the **Begin Date** drop list. d) Enter **<Notes>** in the **Additional Information** field if applicable. e) Click the **Save and Return** button.
5.	On the **Authorized Representative Detail** page: a) Repeat steps 3. – 4. to add this person as an Authorized Representative for another program on the case. b) Click the **Save** or the **Save and Return** button.

Adding a Non-Case Person Authorized Representative

The following steps assumes you are in the context of a case, with the authorized representative you wish to add not known to the case.

Step	Action
1.	On the **Authorized Representative List** page: a) Select **Non-Case Person** from the **Type** drop list. b) Click the **Add** button.
2.	On the **Authorized Representative Detail** page: a) Enter the <**Name**> in the **First Name** drop list. b) Enter the <**Name**> in the **Last Name** drop list.
3.	In the **Address Information** section a) Click the **Add** button in the **Address Information** section.
4.	On the **Address Detail** page: a) Select <**Type of Address(es)**> From the **Address Type(s)** multi-select list if adding addresses. b) Enter <**Address**> in the Address Line 1 field. c) Enter <**City**> in the **City** field. d) Enter <**Zip Code**> in the **Zip Code** field. e) Click the **Submit** button.
5.	On the **Authorized Representative Detail** page: a) Select an **<Program>** from the **Program** drop list. b) Click the **Add** button.
6.	On the **Authorized Representative Program Detail** page: a) Select the **<Yes>** or **<No>** from the **Additional Correspondence Recipient** drop list. b) Select **<No>** from the **LTC MC RE Packet Recipient** (Medi-Cal - only displays when the Yes option is selected from the Additional Correspondence Recipient drop list) or the **Report to MEDS** (CalFresh) drop list. c) Enter a **<Date>** in the **Begin Date** drop list. d) Enter **<Notes>** in the **Additional Information** field if applicable.

	e) Click the **Save and Return** button.
7.	On the **Authorized Representative Detail** page: a) Repeat steps 5 - 6 to add this person as an Authorized Representative for another program on the case. b) Click the **Save** or the **Save and Return** button.

Adding a Resource Authorized Representative

When adding a Resource as an Authorized Representative, once the Resource is selected, the address and contact information displays. The selection in the Use Resource Address drop list determines if the displayed address is used. The available selection options are Yes and No.

- If you save the record with Yes selected from the Use Resource address drop list, when the RDB Maintainer adds or edits the Resource's address on the Resource Detail page, the System updates the Authorized Representative record with the new address.
- You can select No from the Use Person Address drop list, but you will need to add an address. If you save the record with No selected from the Use Person address drop list, when you add or edit the person's address from the Contact Summary page, the address information for the Authorized Representative record will not be updated with the address information entered on the Contact Summary page. You will need to navigate to the Authorized Representative edit the record with the updated address information.

Follow these steps to add an Authorized Representative who is a Resource:

Step	Action
1.	On the **Authorized Representative List** page: a) Select **Resource** from the **Type** drop list. b) Click the **Add** button.
2.	On the **Authorized Representative Detail** page: a) Click the **Select** button for the **Resource** field.
3.	On the Select **Resource** page: a) Enter appropriate search criteria. b) Click the **Search** button. c) Confirm or Click the radio button for the appropriate Resource. d) Click the **Select** button.
4.	On the **Contact Information** section: a) Add additional contacts (if any) b) Click the **Add** button after each additional contact
5.	In the **Program Information** section: a) Select an **<Program>** from the **Program** drop list. b) Click the **Add** button.

6.	On the **Authorized Representative Program Detail** page: a) Select the **<Yes>** or **<No>** from the **Additional Correspondence Recipient** drop list. b) If the program is Medi-Cal and **Yes** option is selected from the **Additional Correspondence Recipient** drop list, then select **<No>** from the **LTC MC RE Packet Recipient** drop list. c) If the program is Medi-Cal, select **Full** or **Limited** from the Authority drop list d) If the program is CalFresh, select **<Yes>** or **<No>** from the **Report to MEDS** drop list. e) Enter a **<Date>** in the **Begin Date** drop list. f) Enter **<Notes>** in the **Additional Information** drop list. g) Click the **Save and Return** button.
7.	On the **Authorized Representative Detail** page: a) Repeat steps 4 - 5 to add this Resource as an Authorized Representative for another program on the case. b) Click the **Save** or the **Save and Return** button.

Editing Authorized Representative Information

The Authorized Representative information can be updated on the Authorized Representative Detail page in Edit mode.

Follow these steps to edit Authorized Representative Information

Step	Action
1.	On the **Authorized Representative List** page a) Click the **Edit** button for the appropriate record.
2.	On the **Authorized Representative Detail** page a) Add or update information as needed. b) if updating Program Information, Click the **Edit** button in the **Program Information** section.
3.	On the **Authorized Representative Program Detail** page. a) Insert appropriate information. b) Insert a new **Begin Date** if change made. c) Click the **Save and Return** button.
4.	On the **Authorized Representative Detail** page. a) Click the **Save** or the **Save and Return** button

If No was selected in the Use Person Address or Use Resource Address drop list when saved, Add and Edit buttons display in the Address Information section to allow you to add or edit address information. You **MUST** update the Authorized Representative record for all address changes.

To End Date the Authorized Representative

When the Authorized Representative is no longer the authorized representative for the Program.

Follow these steps to end date the Authorized Representative:

Step	Action
1.	On the **Authorized Representative List** page a) Click the **Edit** button for the appropriate record.
2.	On the **Authorized Representative Detail** page a) Click **Edit** button of the **Program Information** section.
3.	On the **Authorized Representative Program Detail** page. a) Insert an **End Date**. b) Click the **Save and Return** button.
4.	On the **Authorized Representative Detail** page. a) Click the **Save** or the **Save and Return** button

NOTE: If you need to add a new Authorized Representative follow the Steps on **Adding a Case Person/Non-case Person/Resource Authorized Representative**. Do not edit an existing record.

View Authorized Representatives

Case Summary page

The <Program> section of the Case Summary page displays the Authorized Representative(s) hyperlinks for the program effective the page Display Date. When clicked, the Authorized Representative(s) hyperlink accesses the Authorized Representative Detail page.

<Program> Detail Page

The Administrative Roles section of the <Program> Detail page displays the Authorized Representatives effective the View Date. When clicked, the Name hyperlink accesses the Authorized Representative Detail page.