CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208191

Changes to the Designation and Responsibilities of the Medi-Cal Authorized Representative

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Table of Contents

1 Overview 5
1.1 Current Design 5
1.2 Requests 5
1.3 Overview of Recommendations 5
1.4 Assumptions 5
2 Recommendations 6
2.1 Authorized Representative List 6
2.1.1 Overview 6
2.1.2 Authorized Representative List Mockup 6
2.1.3 Description of Changes 6
2.1.4 Page Location 6
2.1.5 Security Updates 7
2.1.6 Page Mapping 7
2.1.7 Page Usage/Data Volume Impacts 7
2.2 Authorized Representative Detail 8
2.2.1 Overview 8
2.2.2 Authorized Representative Detail Mockup 8
2.2.3 Description of Changes 9
2.2.4 Page Location 9
2.2.5 Security Updates 9
2.2.6 Page Mapping 9
2.2.7 Page Usage/Data Volume Impacts 9
2.3 Authorized Representative Program Detail 10
2.3.1 Overview 10
2.3.2 Authorized Representative Program Detail Mockup 10
2.3.3 Description of Changes 10
2.3.4 Page Location 10
2.3.5 Security Updates 10
2.3.6 Page Mapping 11
2.3.7 Page Usage/Data Volume Impacts 11
2.4 Contact Name Data Change 11
2.4.1 Overview 11

DRAFT

2.4.2 Description of Change 11
2.4.3 Estimated Number of Records Impacted 11
3 Requirements 12
3.1 Project Requirements 12

DRAFT

1 OVERVIEW

1.1 Current Design

The Authorized Representative Detail page captures information regarding the assigned Authorized Representative and/or Additional Correspondent.

1.2 Requests

Applicants and beneficiaries for insurance affordability programs have increased options for choosing roles and responsibilities of the individual or organization they designate as their authorized representative. Counties must accept and use the information completed by the applicant or beneficiary to designate an authorized representative listed on the existing paper Single Streamlined Application (SSApp), on-line SSApp, Statewide Automated Welfare System (SAWS) 2 Plus, MC 306 form, or another form or written designation.

1.3 Overview of Recommendations

1. Add a tooltip to the Program Column of the Authorized Representative List page when the value is 'Medi-Cal'.
2. Add an 'Additional Contact' table to the Authorized Representative Detail page.
3. Add an 'Authority' field to the Authorized Representative Program Detail page.

1.4 Assumptions

N/A

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2 RECOMMENDATIONS

2.1 Authorized Representative List

2.1.1 Overview

The Authorized Representative List page provides links to the Authorized Representative Detail page for all Authorized Representatives associated to a given case. In order to make Authority information more readily available when the Program is 'Medi-Cal', a hover tooltip will be added to provide the Authority details.

2.1.2 Authorized Representative List Mockup

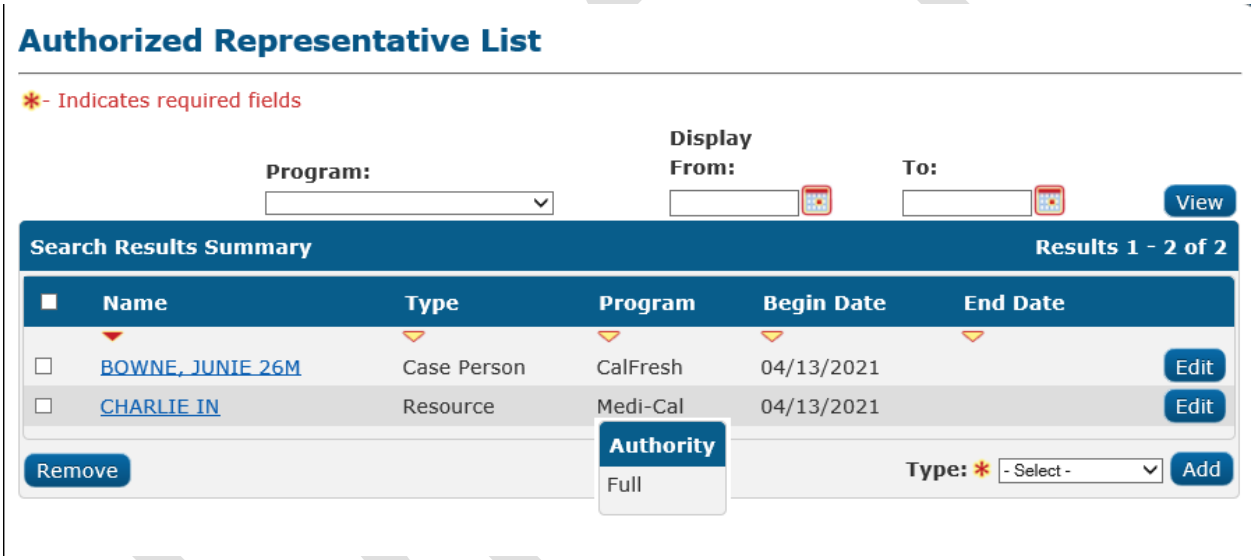

Figure 2.1.1 – Authorized Representative List Mockup

2.1.3 Description of Changes

1. Add a tooltip to the result in the Program column when the result is 'Medi-Cal'.
    a. The tooltip will display the value of the 'Authority' field from the Authorized Representative Program Detail page.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Authorized Representative**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

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2.2 Authorized Representative Detail

2.2.1 Overview

The Authorized Representative Detail page provides a variety of information on a given Authorized Representative attached to a case. In order to be able to store multiple contacts when in the context of a Resource, a table containing the contact's name, phone number, phone type, and email address will be added to replace the 'Contact Name' field.

2.2.2 Authorized Representative Detail Mockup

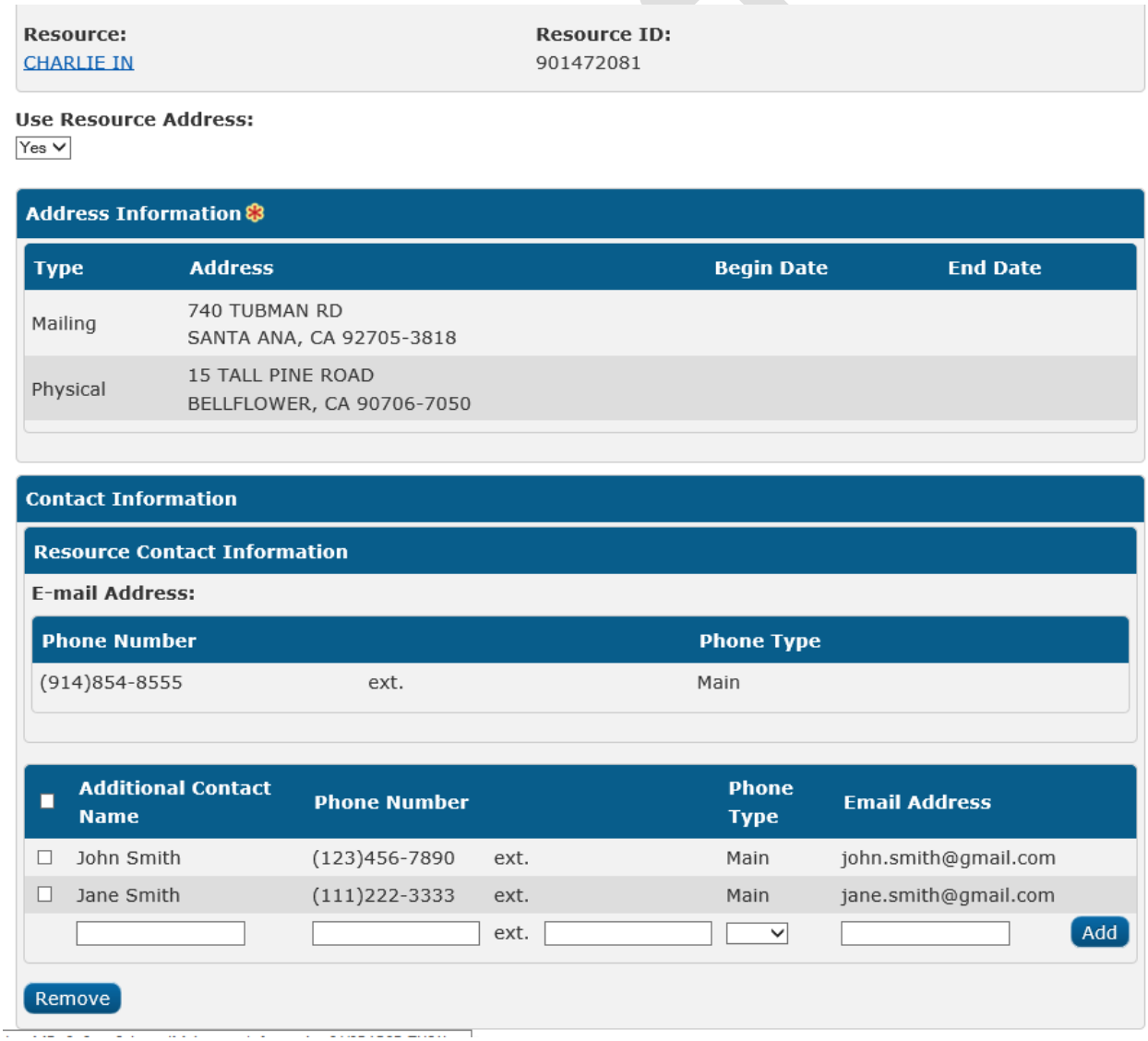

Figure 2.1.1 – Authorized Representative Detail Mockup

2.2.3 Description of Changes

1. Remove the 'Contact Name' field.
2. Change the header of the 'Contact Information' table to 'Resource Contact Information' when in the context of a Resource.
3. Add a new table with the header 'Contact Information' when in the context of a Resource
4. Move the 'Resource Contact Information' table inside the 'Contact Information' table when in the context of a Resource
5. Add a new sub-table to the 'Contact Information' table below the 'Resource Contact Information' table when in the context of a Resource. This table will be able to contain multiple contacts, with the ability to add new ones via a button and ability to remove old ones via a combination of checkboxes and a remove button. The table will contain the following column headers.
    a. Additional Contact Name – This field will store the name of the contact. This field will have a max length of 60 characters.
    b. Phone Number – This field will store the phone number of the additional contact
    c. Ext. – This field will hold the extension of the phone number.
    d. Phone Type - This field will hold the phone type of the additional contact.
    e. Email Address – This field will hold the email address of the additional contact.

2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Authorized Representative**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping with new and updated fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

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2.3 Authorized Representative Program Detail

2.3.1 Overview

Update the Authorized Representative Program Detail page to include an indicator showing whether the Medi-Cal Authority is 'Full' or 'Limited'.

2.3.2 Authorized Representative Program Detail Mockup

Figure 2.1.1 – Authorized Representative Program Detail Mockup

2.3.3 Description of Changes

1. Add an 'Authority' field located below the 'Additional Correspondence Recipient' field and above the 'Begin Date' field. This field will have the value of 'Full' when the Authority is 'Full and 'Limited when the 'Authority is 'Limited'.

2.3.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Authorized Representative**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update page mapping with new and updated fields.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Contact Name Data Change

2.4.1 Overview

The Contact Name field currently only holds a single value, the name itself. With the changes in section 2.2 this name field will be replaced with a table holding a name, phone number, phone number extension, and email address. In order to align existing values with this new table current 'Contact Name' values will be remapped to the 'Additional Contact Name' field in the new child table.

2.4.2 Description of Change

1. Update the Authorized Representative Data Model to support multiple contacts for a resource. Update the existing contacts information to respect the updated data model.

2.4.3 Estimated Number of Records Impacted

10000

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3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

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