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~~s 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.

Authorized Representatives designated as Additional Correspondence Recipients, receive copies of the notices of action and Medi-Cal reminder notices sent to the primary applicant. They can also receive a copy of the Medi-Cal renewal packet when the MC RE Packet Recipient drop list is set to Yes on the Authorized Representative Program Detail page.

~~**Note:** 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, ~~hover over the underlined~~ place the cursor over the underlined Program for a quick view of the authority level of the Authorized Representative. Authorized Representatives ~~and Additional Correspondence Recipients~~ are managed from the Authorized Representative List page.

From the Authorized Representative List 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.	Click the **Authorized Representative** link on 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 from the Type drop list on the Authorized Representative List page. This page allows for more than one Authorized Representative to be added 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 or Edit button to access the Authorized Representative Detail page in View or Edit 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. The information about a single active CalFresh Authorized Representative is sent to MEDS.

For Medi-Cal Authorized Representatives who are Additional Correspondence Recipients, you must make a selection on the ~~LTC~~ MC RE Packet Recipient drop list.

~~**Note:** The LTC MC RE Packet no longer exists, the System will not send out any packet to the Authorized Representative.~~

~~**Note:** The **LTC MC RE Packet Recipient** drop list field will be removed from the page at a later time.~~

Adding a Case Person Authorized Representative

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

The option selected in the Use Person Address drop list, determines if the displayed address is to be retained or edited. The available selection options are Yes and No.

- If the record is saved with Yes selected from the Use Person Address drop list, the System updates the Authorized Representative record with the new address. This is the address which was added or edited on the Address Detail page.
- Select No from the Use Person Address drop list, to add or edit the address displayed on the Authorized Representative Detail page.
  Note: When the record is saved with No selected from the Use Person Address drop list, the person's address is not replicated from the Address Detail page. You must go to the Authorized Representative Detail page and edit the record with the updated address information.

The following steps to add the authorized representative assume you are in the context of a case and the authorized representative you wish to add is 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. c) Select a **<Program>** from the **Program** drop list in the **Program** page section. d) Click the **Add** button in the **Program** page section.
3.	On the **Authorized Representative Program Detail** page: a) Select **<Yes** or **No>** from the **Additional Correspondence Recipient** drop list. b) If the program is Medi-Cal and **Yes** is selected from the **Additional Correspondence Recipient** drop list, then select **<Yes** or **No>** from the **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** field. f) Enter **<Notes>** in the **Additional Information** field if applicable. g) Click the **Save and Return** button.
4.	On the **Authorized Representative Detail** page: a) Repeat steps 2c and 3 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

To add an authorized representative who is not a case person, follow the below steps which assume you are in the context of a case, and the authorized representative you wish to add is 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. c) Click the **Add** button in the **Address Information** page section.

3.	On the **Address Detail** page: a) Select **<Type of Address(es)>** from the **Address Type(s)** multi-select list. 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. **Note**: If the Select Address page displays, review the Possible Matches and user-entered Address page sections and select the appropriate address.
4.	On the **Authorized Representative Detail** page: a) Select a **<Program>** from the **Program** drop list. b) Click the **Add** button.
5.	On the **Authorized Representative Program Detail** page: a) Select **<Yes** or **No>** from the **Additional Correspondence Recipient** drop list. b) If the program is Medi-Cal and **Yes** is selected from the **Additional Correspondence Recipient** drop list, then select **<Yes** or **No>** from the **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** field. f) Enter **<Notes>** in the **Additional Information** field if applicable. g) Click the **Save and Return** button.
6.	On the **Authorized Representative Detail** page: a) Repeat steps 4 and 5 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 select Yes 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.
- If you select No from the Use Resource ~~Person~~Address drop list, you need to add or edit the address when there is a change.

If you save the record with No selected from the Use ~~Person~~Resource Address drop list, when you need to add or edit the ~~person's~~Resource address you need to navigate to the Authorized Representative and 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 select the radio button for the appropriate Resource. d) Click the **Select** button.
4.	On the **Authorized Representative Detail** page: a) Enter **<Person's Name>** in the **Additional Contact Name** field if you need to enter additional contacts. b) Enter the **<Phone Number>** in the **Phone Number** field if you need to enter additional contacts. c) Enter the **<Extension>** in the **ext.** field if you need to enter additional contacts. d) Select the **<Phone Type>** from the **Phone Type** drop list if you need to enter additional contacts. e) Enter the **<Email Address>** in the **Email Address** field if you need to enter additional contacts. f) Click the **Add** button after completing each additional contact. g) Select a **<Program>** from the **Program** drop list of the **Program Information** page section. h) Click the **Add** button in the **Program Information** page section.
5.	On the **Authorized Representative Program Detail** page: a) Select **<Yes** or **No>** from the **Additional Correspondence Recipient** drop list. b) If the program is Medi-Cal and **Yes** is selected from the **Additional Correspondence Recipient** drop list, then select **<Yes** or **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** field. f) Enter **<Notes>** in the **Additional Information** field if applicable. g) Click the **Save and Return** button.
6.	On the **Authorized Representative Detail** page: a) Repeat steps 4f and 5 to add the same 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) Enter or update information as needed. b) If updating Program Information, click the **Edit** button in the **Program Information** page section. If you do not need to edit a program, go to step 6.
3.	On the **Authorized Representative Program Detail** page. a) Enter a **<Date>** in the **End Date** field. b) Click the **Save and Return** button.
4.	On the **Authorized Representative Detail** page. a) In the **Program Information** page section, select a **<Program>** from the **Program** drop list. b) Click the **Add** button.
5.	On the **Authorized Representative Program Detail** page. a) Select **<Yes** or **No>** from the **Additional Correspondence Recipient** drop list. b) If the program is Medi-Cal and **Yes** is selected from the **Additional Correspondence Recipient** drop list, then select **<Yes** or **No>** from the **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** field. f) Enter **<Notes>** in the **Additional Information** field if applicable. g) Click the **Save and Return** button.
6.	On the **Authorized Representative Detail** page. a) Click the **Save** or the **Save and Return** button

If No is selected from the Use Person Address or Use Resource Address drop list when saved, Add and Edit buttons display in the Address Information page section to allow you to add or edit address information.

You must update the Authorized Representative record for all address changes.

Adding the End Date for an Authorized Representative

When the Authorized Representative is no longer assigned to the Program, you must end date the authorized representative record.

Follow these steps to add the end date for an 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 in the **Program Information** page section.
3.	On the **Authorized Representative Program Detail** page. a) Enter the **<Date>** in the **End Date** field. b) Click the **Save and Return** button.
4.	On the **Authorized Representative Detail** page. a) Repeat steps 2 and 3 for additional programs if necessary. b) Click the **Save** or the **Save and Return** button

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.

Viewing Authorized Representatives

Case Summary page

The <Program> ~~section~~block on the Case Summary page displays the Authorized Representative(s) hyperlink for the program, effective the page Display Date. Click the Authorized Representative(s) hyperlink to access the Authorized Representative Detail page.

<Program> Detail Page

The Administrative Roles page section of the <Program> Detail page displays the Authorized Representatives, effective the View Date. Click the Name hyperlink to access the Authorized Representative Detail page.

Additional Correspondence Recipients

Additional Correspondence Recipients are persons or Resources authorized by customers to receive copies of the correspondence sent to the primary applicants. Only one Additional Correspondence Recipient may be added for a program.

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

Additional Correspondence Recipients may be assigned for the following programs:

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

Additional Correspondence Recipients receive copies of notices of action and Medi-Cal reminder notices sent to the primary applicant. They can also receive a copy of the Medi-Cal renewal packet when the MC RE Packet Recipient drop list is set to Yes in the Administrative Role Detail page.

Viewing or Adding Additional Correspondence Recipients

The Case Summary page provides a quick view of the Additional Correspondence Recipient for a program, effective the page Display Date.

The <Program> Detail page also displays the Additional Correspondence Recipient for the program, including the effective date.

Additional Correspondence Recipients are managed from the Administrative Role Detail page.

From the Case Summary page, click the View Details button of the program you want to view. The Additional Correspondence Recipient is listed in the Administrative Roles page section.

Adding a Case Person as an Additional Correspondence Recipient:

Step	Action
1.	On the <Program> Detail page: a) Click the **Edit** button. b) Click the **Add** button in the **Administrative Roles** page section.

2.	On the Administrative Role Detail page: a) Select **Additional Correspondence Recipient** in the **Administrative Role** drop list. b) Select the **<Person>** from the **Name** drop list. c) If the program is Medi-Cal, select **<Yes** or **No>** from the **MC RE Packet Recipient** drop list. d) Enter the **<Date>** in the **Begin Month** field. e) Click the **Save and Return** button.

Adding a Resource as an Additional Correspondence Recipient:

Step	Action
1.	On the <Program> Detail page: a) Click the **Edit** button. b) Click the **Add** button in the **Administrative Roles** page section.
2.	On the Administrative Role Detail page: a) Select **Additional Correspondence Recipient** in the **Administrative Role** drop list. b) Click the **Select** button for Resource.
3.	On the Select Resource page: a) Enter search criteria. b) Click the **Search** button. c) Select the radio button for the correct resource. d) Click the **Select** button.
4.	On the Administrative Role Detail page: a) If the program is Medi-Cal, select **<Yes** or **No>** from the **MC RE Packet Recipient** drop list. b) Enter the **<Date>** in the **Begin Month** field. c) Click the **Save and Return** button.

Important Note: there is no need to add an Authorized Representative as an Additional Correspondence Recipient from the Administrative Role Detail page. Authorized Representatives who are also designated as Additional Correspondence Recipients should be given the designation from the Authorized Representative Program Detail page. Follow the steps on Adding a Case Person/Non-case Person/Resource Authorized Representative.

Adding the End Date for an Additional Correspondence Recipient

Step	Action
1.	On the <Program> Detail page: a) Click the **Edit** button.

	b) Click the **Edit** button for the Additional Correspondent in the **Administrative Roles** page section.
2.	On the Administrative Role Detail page: a) Enter a **<Date>** in the **End Month** field. b) Click the **Save and Return** button.
3.	On the <Program> Detail page: a) Click the **Save and Return** button.

Note: Unless you are End Dating the record for an Additional Correspondence Recipient, do not edit an existing record. To change the selection on the MC RE Packet Recipient drop list for an existing record, first end date the record and follow the steps listed above for Adding a Case Person or Resource as an Additional Correspondence Recipient.