

## Citizenship and Sponsorship – Add or Edit

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### Purpose

The purpose of this job aid is to provide step-by-step instructions on how to add or edit citizenship and/or sponsorship records. The System requires a record to be added in the Citizenship Status List page for all individuals born outside of the U.S., including naturalized U.S. Citizens and U.S. Citizens born abroad, associated to the case in order for the System to transmit the correct information to CalHEERs and MEDS. The System requires a record to be added in the Sponsor List page in order for the system to populate variables on the CAPI Sponsor to Alien Deeming Worksheet SOC 454.

### Add vs. Edit

To protect and maintain historical records of a participant and as the details change over time, you must end date an existing record and add a new record, if there is a change in immigration status. You may need to edit a record if that record was originally entered incorrectly.

### Citizenship Status List Page

The Citizenship Status List page will allow you to view the citizenship status for all individuals born outside of the U.S. associated to the case. You have the ability to narrow or expand the search by specifying a date range in the Display From and To fields and clicking the View button. The System will maintain historical and current citizenship status information.

Step	Action
1.	Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar.
2.	Select <b>Customer Information</b> from the <b>Local</b> navigator.
3.	If necessary, click the <b>Non-Financial</b> link on the <b>Task</b> navigation bar to expand the <b>Non-Financial</b> section.
4.	Click the <b>Citizenship</b> link on the <b>Task</b> navigation bar.

## Citizenship Status Detail Page

The Citizenship Status Detail page will allow you to add or edit citizenship status for individuals born outside of the U.S. or U.S. territory associated to the case.

Depending upon the document type selected from the dropdown, other data elements will dynamically appear on this page and may be required.

## SAVE List Page

On the Citizenship Status Detail page, you will navigate to the SAVE List page by clicking on the View SAVE button. The SAVE List page will provide the option to search for SAVE (Systematic Alien Verification for Entitlement) abstracts within a specified time frame which have been received by the System through the SAVE inbound interface.

## Adding a Citizenship Record

**Note:** Before adding a Citizenship Record, it is recommended that you complete the Individual Demographic Detail page which captures the A (Alien) Number for individuals who are lawfully present.

Step	Action
1.	On the <b>Citizenship Status List</b> page: a) Click the <b>Add</b> button.
2.	On the <b>Citizenship Status Detail</b> page: a) Select <b>&lt;Change Reason&gt;</b> from the <b>Change Reason</b> drop list. b) Enter <b>&lt;Date&gt;</b> in the <b>Reported Date</b> field. c) Select <b>&lt;Name&gt;</b> from the <b>Name</b> drop list. d) Enter <b>&lt;Name&gt;</b> in the <b>Name upon US entry</b> , if applicable. e) Select <b>&lt;Document &gt;</b> from the <b>Document</b> drop list. <b>Note:</b> Depending on the Document selected, a <b>Section Code</b> and/or other fields will dynamically appear. f) Enter the <b>&lt;Document Number&gt;</b> in the <b>Document Number</b> field, if applicable. g) Select <b>&lt;Country&gt;</b> from the <b>Country of Passport Issuance</b> drop list, as applicable. h) Select <b>&lt;Reason&gt;</b> from the <b>PRUCOL Reason</b> or <b>Reason</b> drop list, as applicable. i) Select <b>&lt;Country of Citizenship&gt;</b> from the <b>Country of Citizenship</b> field. j) Enter <b>&lt;Date&gt;</b> in the <b>Issue Date</b> field, as applicable. k) Enter <b>&lt;Date&gt;</b> in the <b>Expiration Date</b> field, as applicable. l) Enter <b>&lt;Date&gt;</b> in the <b>Date of Entry</b> field. m) Enter <b>&lt;Date&gt;</b> in the <b>Adjustment Date</b> field, as applicable. n) Select <b>&lt;Yes or No&gt;</b> from the <b>Five Year Bar Admin Verification</b> drop list. o) Select <b>&lt;Verification Status&gt;</b> from the <b>Verified</b> drop list.

- p) In the **Medi-Cal Reasonable Opportunity Period** section enter **<Date>** in the **Due Date** field.  
**Note:** If Pending is selected, the **Medi-Cal Reasonable Opportunity Period** fields will display.
- q) In the **Medi-Cal Reasonable Opportunity Period** section select **<Yes or No>** from the **Expired** drop list.
- r) Select **<Yes or No>** from the **Sponsored** drop list.  
**Note:** If **Yes** is selected, add a **Sponsorship** record. Go to the **Adding a New Sponsorship Record** section in this job aid for more information. Steps 2s) and 2t) below, only apply, if **Yes** is selected from the **Sponsorship** drop list.
- s) Select **<Yes or No>** from the **Willing to Comply by Providing Sponsor's Information** drop list.
- t) Select **<Yes or No>** from the **Sponsor abuse with substantial connection between the cruelty and the need for benefits?** drop list.
- u) Select **<Yes or No>** from the **Battered** drop list.
- v) Select **<Status>** from the **Verified** drop list.
- w) Select **<Yes or No>** from the **Is this an individual who worked 40 quarters or more, or the spouse, dependent child or unremarried surviving spouse of someone who worked 40 quarters or more?** drop list.
- x) Select **<Status>** from the **Verified** drop list next to
- y) Select **<Yes or No>** from the **Is this individual a Hmong/Lao tribal member or the spouse, dependent child, or remarried surviving spouse of a Hmong/Lao tribal member?** drop list.
- z) Select **<Status>** from the **Verified** drop list.
- aa) Select **<Yes or No>** from the **Is this an individual presently on active duty or a honorably discharged veteran, or the spouse, dependent child, or remarried surviving spouse of an active duty member or veteran?** drop list.
- ab) Select **<Status>** from the **Verified** drop list.
- ac) Select **<Yes or No>** from the **Does this individual have, has applied for or plans to apply for a T-Visa, U-Visa, or VAWA petition?** drop list.
- ad) Select **<Status>** from the **Secondary Save Status** drop list.
- ae) Select **<Status>** from the **Verified** drop list.
- af) Enter **<Date>** in the **Begin Date** field.
- ag) Enter other information if applicable.
- ah) Click the **Save and Add Another** button if you wish to save the newly created record and add another one  
**OR**  
Click the **Save and Return** button to save the record and access the **Citizen Status List** page.

## Editing a Citizenship Record

Step	Action
1.	On the <b>Citizenship Status List</b> page: a) Click the <b>Edit</b> button next to the record you wish to edit. Go to step 3. <b>OR</b> Click the <b>Name</b> hyperlink.
2.	On the <b>Citizenship Status Detail</b> page: a) Click the <b>Edit</b> button.
3.	On the <b>Citizenship Status Detail</b> page: a) Make the appropriate changes. b) Click the <b>Save and Return</b> button.

## Sponsorship List Page

The Sponsorship List page will allow you to view the information for sponsored non-citizen persons associated to the case. You have the ability to narrow or expand the search by specifying a date range in the Display From and To fields and clicking the View button. The System will maintain historical and current sponsorship information.

Step	Action
1.	Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigator.
2.	Select <b>Customer Information</b> from the <b>Local</b> navigator.
3.	If necessary, click the <b>Non-Financial</b> link on the <b>Task</b> navigation bar to expand the <b>Non-Financial</b> section.
4.	Click the <b>Sponsorship</b> link on the <b>Task</b> navigation bar.

## Adding a Sponsorship Record

**Note:** In order to add a sponsorship record, the sponsor will need to be on the case as a case member. To add a person to an existing case, reference the Add a Person to a Case or Program job aid.

### Sponsor Type: Individual

Step	Action
1.	On the <b>Sponsorship List</b> page: a) Select <b>&lt;Individual&gt;</b> from the <b>Sponsor Type</b> drop list. b) Click the <b>Add</b> button.
2.	On the <b>Sponsorship Detail</b> page and in the <b>Establish Change Reason</b> section: a) Select <b>&lt;Change Reason&gt;</b> from the <b>Change Reason</b> drop list. b) Enter <b>&lt;Date&gt;</b> in the <b>Reported Date</b> field.
3.	On the <b>Sponsorship Detail</b> page: a) Select <b>&lt;Sponsored Non-Citizen's Name(s)&gt;</b> from the <b>Sponsored Non-Citizen's Name</b> multi-select list.

Step	Action
	<ul style="list-style-type: none"> <li>b) Select <b>&lt;Sponsor's Name&gt;</b> from the <b>Sponsor's Name</b> drop list.</li> <li>c) Enter <b>&lt;Sponsor's Household Size&gt;</b> in the <b>Sponsor's Household Size</b> field.</li> <li>d) Enter <b>&lt;Total Number of Sponsored Non-Citizens&gt;</b> in the <b>Total Number of Sponsored Non-Citizens</b> field.</li> <li>e) Enter <b>&lt;Total Number of Sponsor's Dependents&gt;</b> in the <b>Total Number of Sponsor's Dependents</b> field.</li> <li>f) Select <b>&lt;Yes or No&gt;</b> from the <b>Did the sponsor sign an I-864?</b> drop list.</li> <li>g) Select <b>&lt;Yes or No&gt;</b> from the <b>Has the spouse of the Sponsor signed a sponsorship affidavit?</b> Drop list.</li> <li>h) Select <b>&lt;Yes or No&gt;</b> from the <b>Does the sponsor help with money?</b> drop list.</li> <li>i) If appropriate, select the checkbox next to the items under <b>Does the sponsor help with any of the following?</b></li> <li>j) Enter <b>&lt;Date&gt;</b> in the <b>Begin Date</b> field.</li> <li>k) If applicable, enter <b>&lt;Date&gt;</b> in the <b>End Date</b> field.</li> <li>l) Click the <b>Save and Add Another</b> button if you wish to save the newly created record and add another one.</li> </ul> <p><b>OR</b></p> <p>Click the <b>Save and Return</b> button to save the record and access the <b>Sponsorship List</b> page.</p>

### Sponsor Type: Corporation

Step	Action
1.	<p>On the <b>Sponsorship List</b> page:</p> <ul style="list-style-type: none"> <li>a) Select <b>&lt;Corporation&gt;</b> from the <b>Sponsor Type</b> drop list.</li> <li>b) Click the <b>Add</b> button.</li> </ul>
2.	<p>On the <b>Sponsorship Detail</b> page and in the <b>Establish Change Reason</b> section:</p> <ul style="list-style-type: none"> <li>a) Select <b>&lt;Change Reason&gt;</b> from the <b>Change Reason</b> drop list.</li> <li>b) Enter <b>&lt;Date&gt;</b> in the Reported Date field.</li> </ul>
3.	<p>On the <b>Sponsorship Detail</b> page:</p> <ul style="list-style-type: none"> <li>a) Select <b>&lt;Sponsored Non-Citizen's Name(s)&gt;</b> from the <b>Sponsored Non-Citizen's Name</b> multi-select list.</li> <li>b) Enter <b>&lt;Name&gt;</b> in the <b>Sponsor's Name</b> field.</li> <li>c) Select <b>&lt;Yes or No&gt;</b> from <b>Does this sponsor help with money?</b> drop list. <b>Note:</b> If <b>Yes</b> is selected, enter <b>&lt;Amount&gt;</b> in the <b>How much?</b> field.</li> <li>d) If appropriate, select the checkbox next to the items under <b>Does the sponsor help with any of the following?</b></li> <li>e) Enter <b>&lt;Date&gt;</b> in the <b>Begin Date</b> field.</li> <li>f) If applicable, enter <b>&lt;Date&gt;</b> in the <b>End Date</b> field.</li> </ul>

Step	Action
	g) Click the <b>Save and Add Another</b> button if you wish to save the newly created record and add another record of the same type. <b>OR</b> Click the <b>Save and Return</b> button to save the record and access the <b>Sponsorship List</b> page.

### Editing a Sponsorship Record

Step	Action
1.	On the <b>Sponsorship List</b> page: a) Click the <b>Edit</b> button next to the record you wish to edit. Go to step 3. <b>OR</b> Click the <b>Name</b> hyperlink.
2.	On the <b>Sponsorship Detail</b> page: a) Click the <b>Edit</b> button.
3.	On the <b>Sponsorship Detail</b> page and in the <b>Establish Change Reason</b> section: a) Select <b>&lt;Change Reason&gt;</b> from the <b>Change Reason</b> drop list. b) Enter <b>&lt;Date&gt;</b> in the <b>Reported Date</b> field.
4.	On the <b>Sponsorship Detail</b> page: a) Make the appropriate changes. b) Click the <b>Save and Return</b> button.