



[CA-271066] CAPI Overpayment (OP) Forms Generation for Authorized Representatives

Issue Type:	CER	Team Responsible:	Assignee:	Adelaide Mendoza
Fix Version/s:		Designer Contact:	Change Type (SCR):	
Minor Version:		Expedite Changes:	Estimate:	
Reporter:	Frederick Gains	Regulation Reference:	Created:	11/28/2023 11:05 AM
Status:	Closed	Impact Analysis:	Outreach Required:	
Policy/Design Consortium Contact:		Training Impacted:	Funding Source:	
Project Phase (SCR):		Funding Source ID:		
Other Agency Cross Reference:				

Current Design:

Request: As part of our county business process, CAPI Overpayment workers will need to provide the customer and the Authorized Representatives (if requested) with the NA 1217, NA 1230, NA 1231, NA 1232.

Currently, workers need to manually generate this set of client correspondences for the customer. If the CAPI Overpayment Worker sees that the Additional Correspondence Recipient is selected as "Yes" on the Authorized Representative Program Detail Page , a copy has to be manually generated for the Authorized Representative as well.

Recommendation:

As a result, the level of manual work needed is creating a workload issue for the CAPI Overpayment Unit.

CalSAWS to automatically generate the following correspondences to be able to be centrally and/or locally printed for the customer, and for Authorized Representatives, when "Yes" is selected from the Additional Correspondence Recipient on Authorized Representative Program Detail Page:

- NA 1217 when a recovery account (RA) is established
- NA 1230 when an OP waiver request is approved
- NA 1231 when OP waiver request is partially approved
- NA 1232 when OP waiver request is denied

Outreach

Description:

Operational Impact: