



**Department of Health Care Services  
Children's Medical Services Network**



# **CMS Net Web Application Letters Section 49**

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# CMS Net Web - Section 49

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# CMS Net Web - Section 49

## 1. Overview

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This manual covers how to generate application letters for CCS and GHPP clients. Upon completing case registration on CMS Net web, users may generate the application process via CMS Net Web or generate via Correspondence module. This manual also explains how to update the application status from the Registration – Additional Information tab or View Correspondence and covers the correspondence rules and FAQs.

## 2. Objectives

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Upon completion of reading this manual, you will be able to:

- Generate application letters
- Update application status
- Undo application status if necessary
- Start a new cycle if necessary
- Learn correspondence rules

## 3. Definitions, Abbreviations & Acronyms

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Term	Definition
CCS	California Children's Services
CMS	Children's Medical Services
CMS Net	CMS Case Management System
CMS Net Legacy	CMS Case Management System – Legacy Application
CMS Net Web	CMS Case Management System – Web Application
DHCS	Department of Health Care Services
GHPP	Genetically Handicapped Persons Program
PMF	Provider Master File
Non-PMF	Non-Provider Master File

## 4. Search – Application Letter Series & Non-Series

There are several options to search for application letter. This manual will only discuss using the category filter to search your letter. For Advance search options, refer to Correspondence manual.



Figure 4-1, Access the Correspondence

Click “Correspondence” on the CMS Net Web Program Modules.

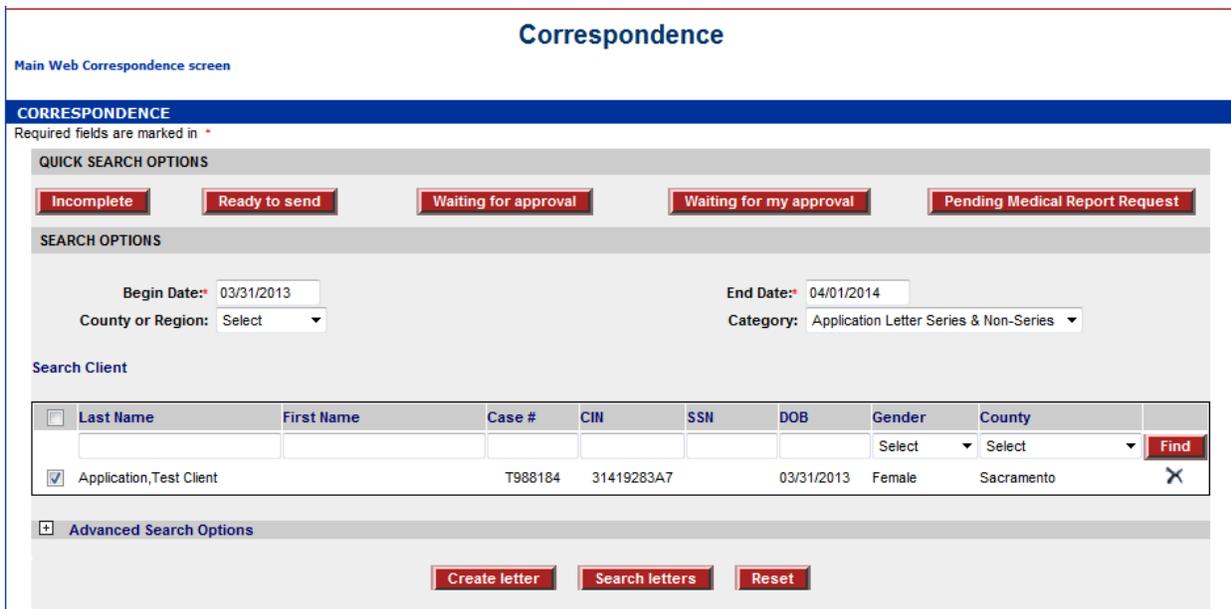


Figure 4-2, Correspondence Search

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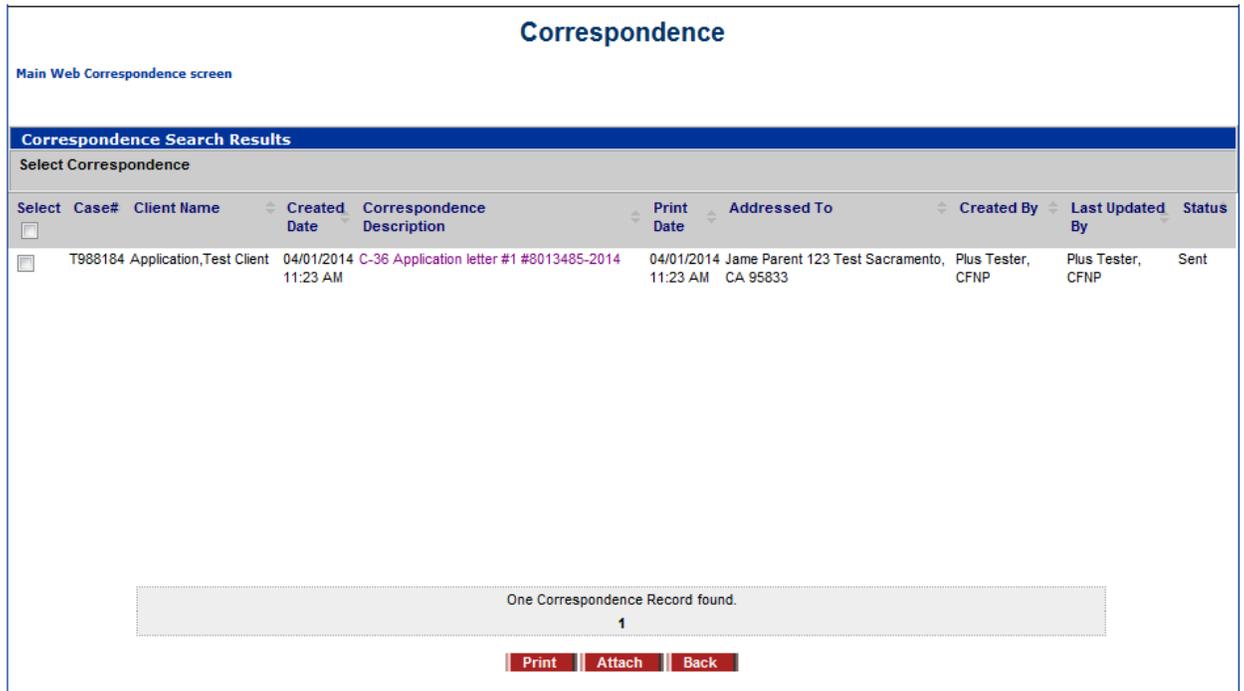
User will be directed to the Correspondence Web.

**Step 1. Begin Date:** from Correspondence module, edit the default begin date to be the client's DOB (*Note: begin date cannot be before 01/01/1988*)

**Step 2. Category:** Select Application Letter Series & Non-Series from the dropdown pick list

**Step 3.** Select the client you want to search letter for.

**Step 4.** Click on the "Search letters" button. 



Select	Case#	Client Name	Created Date	Correspondence Description	Print Date	Addressed To	Created By	Last Updated By	Status
<input type="checkbox"/>	T988184	Application, Test Client	04/01/2014 11:23 AM	C-36 Application letter #1 #8013485-2014	04/01/2014 11:23 AM	Jame Parent 123 Test Sacramento, CA 95833	Plus Tester, CFNP	Plus Tester, CFNP	Sent

One Correspondence Record found.  
1

[Print](#) [Attach](#) [Back](#)

Figure 4-3, Correspondence Search Results

**Step 5.** User will be directed to the Correspondence Search Results page as seen above.

## 5. Generate Application Letter Series & Non-Series

Application Letter Series & Non- Series is generated and completed from the Correspondence module.

### Steps to Request an Application Letter Series & Non-Series letter

The screenshot shows the 'Correspondence' module interface. At the top, there are navigation links for 'California Home', 'DHCS Home', and 'DHCS Organization', along with the date 'Wednesday, March 26, 2014 12:05:46 P.M.'. Below this is a 'System Test' header with the tagline 'Caring for Children with Special Medical Needs...'. A navigation bar includes links for 'Home Page', 'Referral Tracking', 'Registration', 'Program Modules', 'Coverage', 'MEDS Inquiry', 'Reports', and 'Administration', along with 'My Web Messages (0)'. The main content area is titled 'Correspondence' and 'Main Web Correspondence screen'. A 'CORRESPONDENCE' section contains a note 'Required fields are marked in \*'. Under 'QUICK SEARCH OPTIONS', there are five buttons: 'Incomplete', 'Ready to send', 'Waiting for approval', 'Waiting for my approval', and 'Pending Medical Report Request'. The 'SEARCH OPTIONS' section includes 'Begin Date\*' (02/24/2014), 'End Date\*' (03/26/2014), 'County or Region:' (Select), and 'Category:' (Select). A 'Search Client' table is displayed with columns: Last Name, First Name, Case #, CIN, SSN, DOB, Gender, County, and a 'Find' button. The table contains one entry: 'Test,Caseload' with Case # 9877010, CIN 35508083A6, DOB 03/04/2014, Gender Not Known, and County Los Angeles. Below the table is an 'Advanced Search Options' section with three buttons: 'Create letter', 'Search letters', and 'Reset'.

Figure 5-1, Create letter

**Step 1.** From Correspondence module, select the client you want to create letter for.

**Step 2.** Click on the 'Create letter' button. 

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**CORRESPONDENCE**  
Required fields are marked in \*

**CLIENT INFORMATION**

Client Name: Application, Test Client Case Number:

**Create Correspondence**

Category: Application Letter Series & Non-Series

Correspondence: Select

Addressed To: Select

Other Details

Case Note / Comments

- C-36 - Application letter #1
- C-36HF - Application letter #1 Healthy Families
- C-36HFO - Application letter #1 Healthy Families (non-series)
- C-36M - Application letter #1 Medi-Cal
- C-36MO - Application letter #1 Medi-Cal (non-series)
- C-36MTU - Application letter #1 MTU

Figure 5-2, Correspondence Create

**Step 3. Category:** Select “Application Letter Series & Non-Series”

**Step 4. Correspondence:** Select the correspondence type.

CCS Correspondence Type:

C-36	Application letter #1
C-36HF	Application letter #1 Healthy Families
C-36HFO	Application letter #1 Healthy Families (non-series)
C-36M	Application letter #1 Medi-Cal
C-36MO	Application letter #1 Medi-Cal (non-series)
C-36MTU	Application letter #1 MTU

GHPP Correspondence Type:

G-36	GHPP Initial application/financial packet #1
G-34	GHPP Annual application/financial packet #1
G-37	GHPP Incomplete application/financial letter #1

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**CORRESPONDENCE**  
Required fields are marked in \*

**CLIENT INFORMATION** Case Alerts (0) [Face Sheet](#)

Client Name: Application, Test Client      Case Number: T988184      Date Of Birth: 03/31/2013

**Create Correspondence**

Category: Application Letter Series & Non-Series  
Correspondence: C-36 - Application letter #1  
Addressed To: **Jame Parent**  
123 Test  
Sacramento, CA 95833  
Date Issued:  
Correspondence #:  
Auth #:  
Date Printed :  
Application Type: CCS

**Courtesy Copy History**

Name	Address	Date Sent/Remove?
------	---------	-------------------

[Add/Edit](#)

**Attachments**

Select	Type
<input type="checkbox"/>	DHS-4027 - CCS Consent for MTP Services
<input type="checkbox"/>	HF-STATEMENT - Healthy Families Statement of Annual Income
<input type="checkbox"/>	NPP - Notice of Privacy Practices (NPP) - HIPAA
<input type="checkbox"/>	PSA - Program Services Agreement (02/2011)

**Other Details**

Case Note / Comments

Letter Status:

[Back](#)   [Save](#)   [Save & Print](#)

Last Updated By:      Last Updated Date:

Figure 5-2, Correspondence Create

**Step 5. Addressed To:** The system auto populates the client's primary address as seen above, once the correspondence type is selected.

**Step 6. Add/Edit:** Select courtesy copy using the Add/Edit button if necessary. This is optional.

*Add/Edit: Allows Users to send courtesy copies to additional parties. If the letter requires approval, then the approval section will appear and selecting an Approver is required.*

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		Attachment Type								
		DHS-4027	HF-STATEMENT	NPP	PSA	C-17A	C-13ORTH	MC-2600	TRAN-D	TRAN-I
Letter Type	C-13					X	X			
	C-14					X	X			
	C-16	X	X	X	X			X		
	C-16A	X	X	X	X			X		
	C-16HF	X	X	X	X			X		
	C-16HFA	X	X	X	X			X		
	C-16HFO	X	X	X	X			X		
	C-16M	X	X	X	X			X		
	C-16MA	X	X	X	X			X		
	C-16MA	X	X	X	X			X		
	C-16MO	X	X	X	X			X		
	C-36	X	X	X	X			X		
	C-36A	X	X	X	X			X		
	C-36HF	X	X	X	X			X		
	C-36HFA	X	X	X	X			X		
	C-36HFO	X	X	X	X			X		
	C-36M	X	X	X	X			X		
	C-36MA	X	X	X	X			X		
	C-36MO	X	X	X	X			X		
	C-36MTU	X	X	X	X			X		
	C-36MTU-A	X	X	X	X			X		
	C-38	X	X	X	X			X		
	C-38A	X	X	X	X			X		
	C-38HF	X	X	X	X			X		
	C-38HFA	X	X	X	X			X		
	C-38HFO	X	X	X	X			X		
	C-38M	X	X	X	X			X		
	C-38MA	X	X	X	X			X		
	C-38MO	X	X	X	X			X		
	FREE1 (Vendor)					X	X			
	FREE2 (Family)	X	X	X	X			X	X	X

Figure 5-3, Supplemental Attachment Chart

**Step 7. Attachment:** Select supplemental attachment if necessary. This is optional.

- ❖ Supplemental Attachment Chart above outlines which attachments are available for each letter type.
- ❖ *PSA: if PSA is selected as an attachment, program eligibility date will only auto display only on template if program eligibility dates is establish via CMS Net Legacy.*

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**CORRESPONDENCE**

Required fields are marked in \*

[Case Alerts \(0\)](#)   [Face Sheet](#)

<b>Client Name:</b>	Application, Test Client	<b>Case Number:</b>	T988184
<b>Date Of Birth:</b>	03/31/2013		

**Create Correspondence**

<b>Category:</b>	Application Letter Series & Non-Series ▼		
<b>Correspondence:</b>	C-36 - Application letter #1 ▼		
<b>Addressed To:</b>	Jame Parent 123 Test Sacramento, CA 95833	<b>Date Issued:</b>	
		<b>Correspondence #:</b>	
		<b>Auth #:</b>	
		<b>Date Printed :</b>	
		<b>Application Type:</b>	CCS

**Courtesy Copy History**

Name	Address	Date Sent/Remove?
<span style="background-color: #d32f2f; color: white; padding: 2px 5px; border-radius: 3px;">Add/Edit</span>		

**Attachments**

Select	Type
<input type="checkbox"/>	DHS-4027 - CCS Consent for MTP Services
<input type="checkbox"/>	HF-STATEMENT - Healthy Families Statement of Annual Income
<input type="checkbox"/>	NPP - Notice of Privacy Practices (NPP) - HIPAA
<input type="checkbox"/>	PSA - Program Services Agreement (02/2011)

**Other Details**

**Case Note / Comments**

**Letter Status:**

Back
Save
Save & Print

**Last Updated By:** \_\_\_\_\_ **Last Updated Date:** \_\_\_\_\_

Figure 5-4, Correspondence create

- Step 4. Case Note/Comment:** Add case note comments.
  - This only displays on case note and not correspondence.
  
- Step 5. Save & Print:** Click the “Save & Print” button to print correspondence.

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<p>CALIFORNIA CHILDREN'S SERVICES                  Sacramento County CCS Office                  9616 Micron Avenue Suite 970                  Sacramento, CA 95827                  Ph: (916) 875-9900                  Fax: (916) 854-9500</p>	<p style="text-align: right;"><b>Original</b></p> <p style="text-align: right;"><b>First Notice</b></p> <p style="text-align: right;">04/01/2014</p>
<p>Jame Parent                  123 Test                  Sacramento, CA 95833</p>	<p>Client Name: Test Client Application                  Birth Date: 03/31/2013                  Case #: T988184                  County: Sacramento                  CIN #: 31419283A7</p>
<p>Dear Jame Parent:</p> <p>Test Client Application was referred to California Children Services (CCS) program by Jame Parent</p> <p>If Test Client Application is eligible, the CCS program may pay part or all of Test Client Application's related medical costs. For more information on the CCS program, please read the enclosed application and/or pamphlet.</p> <p>Before the county can determine program eligibility, a CCS application must be completed, signed, and returned to this office</p>	

Figure 5-5, Example of Application Letter

Once you select the "Save & Print" button, system will display the correspondence as seen above.

Correspondence										
Main Web Correspondence screen										
Correspondence Search Results										
Select Correspondence										
Select	Case#	Client Name	Created Date	Correspondence Description	Print Date	Addressed To	Created By	Last Updated By	Status	
<input type="checkbox"/>	T988184	Application,Test Client	04/01/2014 11:23 AM	C-36 Application letter #1 #8013485-2014	04/01/2014 11:23 AM	Jame Parent 123 Test Sacramento, CA 95833	Plus Tester, CFNP	Plus Tester, CFNP	Sent	

Figure 5-6, Correspondence Search Results

The letter is now created and displays as seen above when searched.

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### Application Letter - Rules and Helpful Information

#### CCS & GHPP:

Application letter may only be generated for the following case statuses: Active, Pending, and Reopen Pending.

#### CCS Only:

- ❖ **Application tickler:** The second and third letters is generated by due process based on the ticklers set from previous (1<sup>st</sup>) sent letter for CCS.

Tickler: upon completing the letter, the system sets the Application Letter series tickler to be T+20 days

- C-36 → C-36A → C-36B
- C-36HF → C-36HFA → C-36HFB
- C-36M → C-36MA → C-36MB
- C-36MTU → C-36MTUA → C-36MTUB

- ❖ **PSA as attachment:** program eligibility date will auto display only if program eligibility dates have been establish via CMS Net Legacy.

#### GHPP Only:

- ❖ **Application tickler:** The final notice is generated by due process based on the ticklers set from previous (1<sup>st</sup>) sent letter with ability to generate final letter.

Final letter in series may be generated once 1<sup>st</sup> letter is set to "Sent" status.

- G-34A - GHPP Annual application/financial packet #2 (final)
- G-36A - GHPP Initial application/financial packet #2 (final)
- G-37A - GHPP Incomplete application/financial letter #2 (final)

Tickler: upon completing the letter, the system sets the Application Letter series tickler to be T+30 days for below:

- G-34 → G-34A
- G-36 → G-36A

Tickler: upon completing the letter, the system sets the Application Letter series tickler to be T+15 days for below:

- G-37 → G-37A

## 6. Generate Application Letter via Registration Module

Besides going to Correspondence module, users have the opportunity to create application letter upon successfully creating a new client or reopening a case to pending or reopen pending status.

After completing the case registration or status update to either pending or reopen pending, system will prompt the user with message.

The screenshot displays the CMS Net Web Registration Module interface. A central dialog box titled "CMS Dialog" is open, asking: "Do you want to generate Application Status Series on successful save?" with "Yes", "No", and "Cancel" buttons. The background interface includes several sections:

- Search:** Two "Select" dropdown menus and a "Find" button.
- Client List:** A table with columns: Name, Contact No, Role, Remove.
- Diagnosis:** Fields for ICD Code and Description, with a "Find" button. Below is a table with columns: ICD Code, Description, Diagnosis / Treatment, Remove, Priority.
- Patient / Primary Addressee:** A table with columns: Addressee Type, Name And Address, Phone(s) / Notes. It lists a Primary addressee (Molly Pp) and a Patient addressee (Application, Client One).
- Siblings:** A "Search Client" section with a table containing columns: Last Name, First Name, Case #, CIN, SSN, DOB, Gender, County, and a "Find" button.
- Other Information:** Fields for Chart Number, HRIF (checkbox), Known To (CCS), and SCI Last Updated On (04/23/2014).
- MEDS Inquiry Information:** Fields for Registered By (Molly Phomsopha), Last Updated By (Sacramento Tester, CFNP), Registered On (04/22/2014), and Last Updated On (04/23/2014 02:12 PM).
- Buttons:** "Back", "Save", "Face Sheet", "Add SAR", and "Reset" buttons at the bottom.

Figure 6-1, Updating Registration Module

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**Step 1. Click Yes:** System navigates user to the Correspondence page.

➤ Create Correspondence page

**Step 2. Click No:** Stay on screen with saved client information update.

### Author's Note:

- System will auto generate 2<sup>nd</sup> and 3<sup>rd</sup> letters unless application status entry is entered.
- When application status entry is entered, future tickler is removed.

## 7. Update Application Status as Signed or No Action

There are two modules users can utilize to update application status:

- Update Status via Registration – Additional Information Tab
- Update Status via Correspondence – View Correspondence

And both modules allow user to update the status with two options:

- Option One: Update Status as “Signed App” with date signed.
- Option Two: Update Status as “No Action” with reason for no action taken.

### Update Status via Registration – Additional Information Tab

As stated above there are two modules users can utilize to update application status. This section will discuss how to update the application status via Registration – Additional Information Tab.

Below steps is to show you how to update application status via Registration – Additional Information Tab

California Home DHCS Home DHCS Organization Thursday, April 3, 2014 11:03:32 A.M.

System Test  
Caring for Children with Special Medical Needs...

Contact Us | FAQ | Help | Logout  
Current Logged in User : **Abc Test**

Home Page | Referral Tracking | Registration | Program Modules | Coverage | MEDS Inquiry | Reports | Administration My Web Messages (0)

### Registration

Main Registration Search screen

#### Search - Patient

Required fields are marked in \*

SEARCH OPTIONS

SEARCH FOR PATIENT

Search Client

<input type="checkbox"/>	Last Name	First Name	Case #	CIN	SSN	DOB	Gender	County	
<input type="checkbox"/>							Select	Select	Find
<input checked="" type="checkbox"/>	Testa,Adam		3368664	92996633A7		06/25/1986	Male	San Diego	X

Figure 7-1, Registration Search

- Step 1.** Go to Registration module
- Step 2.** Select your client and click “Edit Patient”
- Step 3.** System will take user to Patient Information tab

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Figure 7-2, Additional Information Tab

**Step 4. Additional Info tab:** click “Additional Information” tab

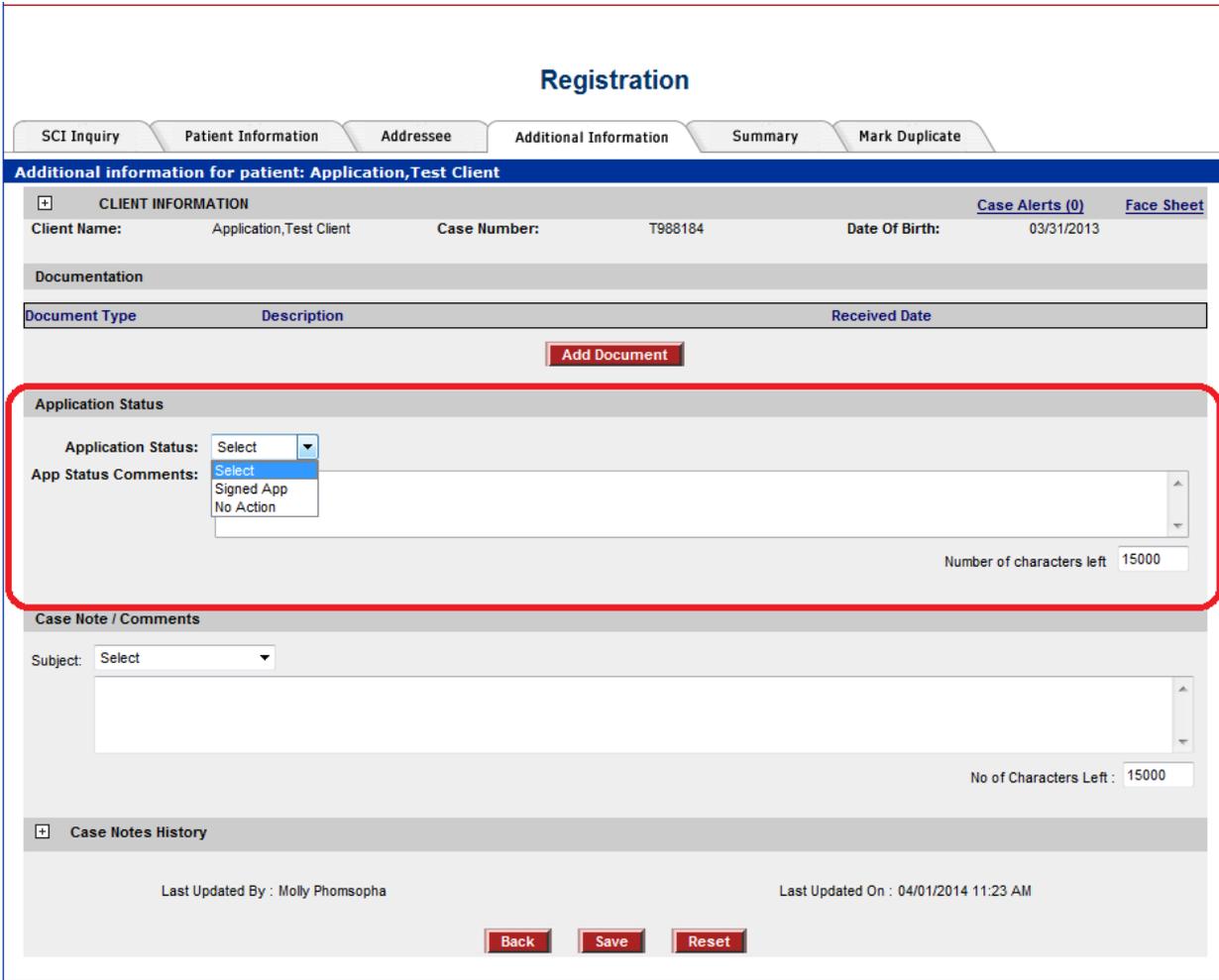


Figure 7-3, Additional Information Tab – Status Entry

**Step 5. Application Status:** Select application status from the drop down.

**Option One:** Update Status as “Signed App” with date signed.

Application Status: Signed App ▼  
App Received Date: \* 04/01/2014

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If Signed App is selected, App Received Date field will enable for signed date to be entered.

**Option Two:** Update Status as “No Action” with reason for no action taken.

Application Status: No Action ▼  
No Action Reason: \* Returned by USPS ▼

If No Action is selected, No Action Reason field will enable for reason to be selected from drop down.

**Step 6. App Status Comments:** After selecting the application status, enter an application case note comment. This is optional.

**Step 7. Save:** Click “Save” button when done and system will save updated status and auto generate case notes for the status update.

### Author’s Note:

If an application letter is not needed, user may directly go update status as received or no action.

- Search for client in Registration.
- Go to Additional Information Tab and enter status rec’d

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### Update Status via Correspondence – View Correspondence

You may also choose to update the application status entry via View Correspondence as mentioned in above section.

Below steps is to show you how to update application status via Correspondence module.

As in above section, there are two options to enter status entry information once application is received or if no action needs to be updated on record to stop tickler.

**Option One:** Update Status as signed application received and date sign.

**Option Two:** Update Status as No action with no action reason.

The screenshot shows the 'CORRESPONDENCE' module interface. At the top, there are five status filters: 'Incomplete', 'Ready to send', 'Waiting for approval', 'Waiting for my approval', and 'Pending Medical Report Request'. Below these are search options including 'Begin Date' (03/02/2014), 'End Date' (04/01/2014), 'County or Region' (Select), and 'Category' (Select). A 'Search Client' section contains a table with columns: Last Name, First Name, Case #, CIN, SSN, DOB, Gender, and County. A 'Find' button is located to the right of the table. Below the table, there are three buttons: 'Create letter', 'Search letters', and 'Reset'.

<input type="checkbox"/>	Last Name	First Name	Case #	CIN	SSN	DOB	Gender	County	
<input checked="" type="checkbox"/>	Application,Test Client		T988184	31419283A7		03/31/2013	Female	Sacramento	X

Figure 7-4, Search Client

- Step 1. Main Web Correspondence screen:** Go to Correspondence module
- Step 2. Search Letters:** select client and click "Search letters" button
- Step 3.** System then takes you to the Correspondence Search Results page

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Correspondence										
Main Web Correspondence screen										
Correspondence Search Results										
Select Correspondence										
Select	Case#	Client Name	Created Date	Correspondence Description	Print Date	Addressed To	Created By	Last Updated By	Status	
<input type="checkbox"/>	T988184	Application,Test Client	04/01/2014 11:23 AM	<a href="#">C-36 Application letter #1 #8013485-2014</a>	04/01/2014 11:23 AM	Jame Parent 123 Test Sacramento, CA 95833	Plus Tester, CFNP	Plus Tester, CFNP	Sent	

Figure 7-5, Correspondence Description

**Step 4.** Click on the Correspondence Description link

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**Correspondence**

Main Web Correspondence screen

**CORRESPONDENCE**

CLIENT INFORMATION  
Client Name: Application, Test Client    Case Number: T988184    Date Of Birth: 03/31/2013    [Case Alerts \(0\)](#)    [Face Sheet](#)

View Correspondence

1 / 3    67.5%    Tools    Sign    Comment

**CALIFORNIA CHILDREN'S SERVICES**  
Sacramento County CCS Office  
9616 Micron Avenue Suite 970  
Sacramento, CA 95827  
Ph: (916) 875-9900  
Fax: (916) 854-9500

**Original**  
**First Notice**  
04/07/2014

**PREVIEW ONLY**

Jame Parent  
123 Test  
Sacramento, CA 95833

Client Name: Test Client Application  
Birth Date: 03/31/2013  
Case #: T988184  
County: Sacramento  
CIN #: 31419283A7

Dear Jame Parent:

Test Client Application was referred to California Children Services (CCS) program by Jame Parent  
If Test Client Application is eligible, the CCS program may pay part or all of Test Client Application's related medical costs.  
For more information on the CCS program, please read the enclosed application and/or pamphlet.

Before the county can determine program eligibility, a CCS application must be completed, signed, and returned to this office at the above address. **THE APPLICATION MUST BE RETURNED BY 04/21/2014** to ensure that program eligibility begins on the referral date.  
After we receive the application, we will contact you again to set up a meeting date to review financial and residential eligibility for CCS benefits.  
Please call the Sacramento County CCS Office at (916) 875-9900 if you have any questions.

Comments

Letter Status: Sent  
Next Letter Type: C-36A    Next Letter Due Date: 04/21/2014

Application Letter  
Application Status: Select    Application Type: CCS

Application Letter Series Case Note  
Number of characters left: 15000

Series History

Status	Type	Printed Date	Correspondence #	Next Letter Due
--------	------	--------------	------------------	-----------------

Save    Add Co    Cancel Letter    Print    Attach    Reissue    Back

Figure 7-6, View Correspondence

**Step 5.** System will then take user to the View Correspondence page

**Step 6.** Scroll down to the bottom of the page to "Application Letter" section

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Application Letter

Application Status: Select Application Type: CCS

Application Letter Series Case Note

Number of characters left 15000

Series History

Status	Type	Printed Date	Correspondence #	Next Letter Due
--------	------	--------------	------------------	-----------------

Save Add Cc Cancel Letter Print Attach Reissue Back

Figure 7-7, View Correspondence

**Step 7. Application Status:** Select application status from the drop down.

**Option One:** Update Status as “Signed App” with date signed.

Application Status: Signed App

App Received Date: \* 04/01/2014

If Signed App is selected, App Received Date field will enable for signed date to be entered.

**Option Two:** Update Status as “No Action” with reason for no action taken.

Application Status: No Action

No Action Reason: \* Returned by USPS

If No Action is selected, No Action Reason field will enable for reason to be selected from drop down.

**Step 8. Application Letter Series Case Note:** After selecting the application status, enter an application case note comment. This is optional.

**Step 9. Save:** Click “Save” button when done and system will save updated status and auto generate case notes for the status update.

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### Application Status Entry- Rules and Helpful Information

The two modules users can utilize to update application status:

- Registration – Additional Information Tab
- Correspondence – View Correspondence

Stop letter tickler by selecting a status from the Application Status dropdown.

Application Status is a dropdown with two options: Signed App and No Action.

- Signed App: User may indicate sign status and date signed.
- No Action User may indicate no action and the reason for no action.

Status entry case note: upon saving status entry, a case note is generated. Case note will display date signed and status or the no action and the no action reason.

- System generate case note when application status entry is entered.
- Auto case note generates regardless of whether user enter comment in Case Note/Comments section or not.

#### **Some FAQ:**

Q: I received a signed application, I don't need to send an application out, what should I do?

A: Go to Registration – Additional Information Tab and update the application status as signed app and enter date received.

Q: When can I update the status entry via Registration – Additional Information Tab?

A: You may update status any time.

Q: When can I update the status entry via View Correspondence page?

A: Letter must be in sent status to update status entry from View Correspondence page. When application status entry is entered, if exists, system will delete unsent application series.

Q: When can I undo status entry?

A: If status entry is entered in error, user may undo the status within 90 days of 1<sup>st</sup> letter being sent from View Correspondence page. After 90 days, user may undo status via Registration – Additional Information Tab

- Note: no case note is generated for undoing status.

Q: Reopened case, what happens to previous status entered?

A: The system clears the application status entry from the Additional Information tab for all case closure reason except NEG1, which system retains the application status entry with ability to edit.

Q: What happens when a case is closed, denied, or put as not open?

A: If no status entry exists, system inputs reason "Registration status changed" on application series when status changes from Active, Pending, Reopen Pending to Closed, Denied, or Not Open.

## 8. When/How to undo Application Status

---

In case you updated the application status on the wrong client or just need to undo an entry entered in error. This section will show you how to undo the application status.

You may undo status entry via Registration – Additional Information Tab or Correspondence module via View Correspondence page

The screenshot shows a web form titled "Application Letter". At the top, there are two dropdown menus: "Application Status" (set to "No Action") and "No Action Reason" (set to "Select"). To the right, "Application Type" is "CCS". Below these is a large text area for "Application Letter Series Case Note" with a "Number of characters left" indicator showing 15000. At the bottom, there is a "Series History" table with columns: Status, Type, Printed Date, Correspondence #, Next Letter Due. Below the table are several buttons: Save, Add Cc, Cancel Letter, Print, Attach, Reissue, and Back.

Figure 8-1, Add screen shot of entry

**Step 1.** Go to Registration – Additional Information Tab

**Step 2.** Application status: undo the status by putting the status back to “Select.”

**Step 3.** Save: click save to save the information.

Please note, case note will not auto generate for undo update. If necessary, go enter a case note in Case Note module.

### Undo Status Entry- Rules and Helpful Information

Registration – Additional Information Tab – may undo any time.

View Correspondence – may undo status entry within 90 days of 1<sup>st</sup> letter sent.

Q: When can I undo status entry?

A: If status entry is entered in error, user may undo the status within 90 days of 1<sup>st</sup> letter being sent from View Correspondence page. After 90 days, user may undo status via Registration – Additional Information Tab

- Note: no case note is generated for undoing status.

Q: I want to start a new series; will the system cancel my existing series?

A: Yes, if there is no status entry entered on the current series.

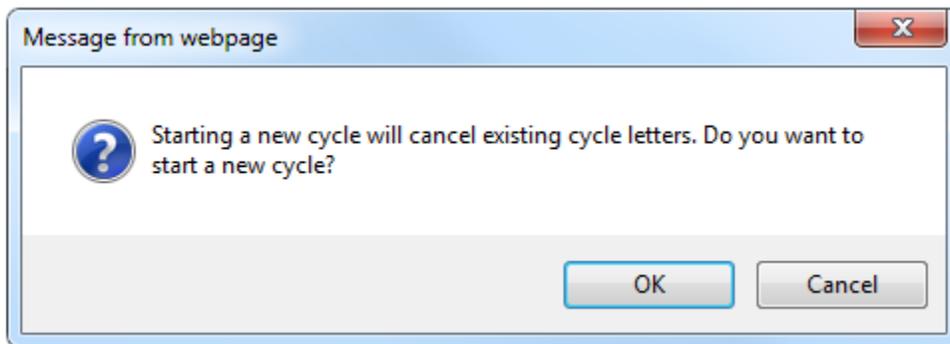
## 10 Start New Cycle or Switch Letter Type

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In case you started the series with the incorrect letter type, you may start new cycle at any time.

How to Start a New Cycle:

- Step 1.** From Correspondence module, select the client you want to create letter for.
- Step 2.** Click on the 'Create letter' button.
- Step 3. Category:** Select "Application Letter Series & Non-Series"
- Step 4. Correspondence:** Select the correspondence type.



**Step 5. Message Prompt:** system will prompt you with the above message.

**OK:** Click "OK" to cancel the existing series and system will allow you to continue and start your new series. See section 4 for instructions on how to create series and non-series.

**Cancel:** Click "Cancel" to exit and not cancel existing series.