



CHAPTER 2  
**Certified Application  
Assistant (CAA)  
Menu Functions**

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## Main Menu

This section reviews all Menu functions that Certified Application Assistants have available to perform their work.

### Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Healthy San Francisco Enrollment History
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes
- View Notes
- View Application Workflow History
- Applications referred from CHDP User
- View Terminating HSF Members
- Verification Documents
- Conduct Healthy San Francisco Verification Query

# CAA Menu Functions: BEGIN APPLICATION

## Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets

## Begin Application

Click here and then click “Next” to begin a new application.

When you begin a new application the One-e-App system will always prompt you to **conduct an application search**. This is important to prevent duplicates in the system.

You can search for the Primary Informant or other member of the household.



## Search for an Application

Before beginning a new application, you must perform a search to find out whether the applicant (s) already exists in the system. Please specify at least two criteria or a unique identifier by which you would like to search.

### Person Detail

First Name

Middle Name

Last Name

Suffix

Legal Gender  Male  Female

Transgender  Yes  No

Date of Birth

### Person Place of Birth

California County  or

US State  or

Other Country

The search results can be further filtered by the assistor's name and a creation date range.

### Application Assistor

First Name

Last Name

### Creation Date Range

From

To

### Unique Identifier

Application ID

Person ID

SSN

MRN

ID Number

SFHP ID



## Application Search Tips

- Each additional criteria you enter narrows your search further. You may want to start with a few criteria first then add more if needed to narrow the search results.
- If you search by Person Detail or Place or Birth, you must enter at least two criteria, such as First Name and Last Name OR First Name and Date of Birth.
- If you want to see all the application's you created, enter your name in the Application Assistor field.
- If you search by Unique Identifiers, such as Application ID, you only need to enter one criteria.

# CAA Menu Functions: BEGIN APPLICATION

## Search Results

To retrieve and continue with an application, click on the applicant's name. Applications that you are authorized to coauthor are highlighted in blue.

## Applications in Progress

Applicant Name	Date Of Birth	Created By	Creation Date	Application ID	Person ID	Score
Alpha Parenta	N/A	Sarah Boehm	7/17/2007	200719700359	N/A	N/A

## Determined Applications Pending Submission

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Child One	5/12/1999	Sarah Boehm	7/17/2007	CHDP	Fax	200719700037	33801008197073	N/A
Child One	5/12/1999	Sarah Boehm	7/17/2007	Medi-Cal for Children and Pregnant Woman	Fax	200719700037	33801008197073	N/A
Mary Lamb	5/11/1932	Sarah Boehm	7/17/2007	Medi-Cal - Full Scope, No Share of Cost	Fax	200719700037	33801007197074	N/A
Tommy Smith	1/1/2003	Sarah Boehm	7/23/2007	CHDP	Fax	200720300033	33801036203075	N/A

## Expired or Program Closed Applications

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
No matching records were found.								

## Submitted Applications

Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Cheryl Smith	1/1/1982	Sarah Boehm	7/23/2007	Medi-Cal - Full Scope, Share of Cost,	Fax	200720300033	33801035203076	N/A
Marshall Smith	1/1/1979	Sarah Boehm	7/23/2007	Healthy San Francisco	Fax	200720300033	33801034203077	N/A
Tommy Smith	1/1/2003	Sarah Boehm	7/23/2007	Healthy Kids Young Adults	Fax	200720300033	33801036203075	N/A

Note: Each  indicates a renewal application.

Note: Each  indicates a renewal application which has started and not completed through final eligibility review.

Note: Each  indicates Program Closed application(s) / person(s).

Note: Each  is a link to a person's application summary.

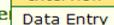
Note: Each  is a link to add a person to the clipboard.

Note: Each  is a link to Workflow History.

Note: Each  is a link to Print Document and Forms.

Total number of applications in progress : 1  
 Total number of determined applications pending submission : 4  
 Total number of Expired and Program Closed Applications : 0  
 Total number of submitted persons : 3

 Search  
  **Begin New Application**  
  Renew/Modify  
  View Clipboard  
  Next

 Enrollme  
  Interview  
  Data Entry



## Application Search Tips

The search results page shows you all potential matches based on the criteria you entered. Applications appear in tables based on their status. Searching is very important for reducing duplicates in the system.

**Review each table closely to see if your applicant is listed.**

**Found a potential match?** If needed, you can verify that it is the same person by clicking on their name and seeing the application details.

If you find a match, click on the **Clipboard** icon next to the name to put the applicant's information on the Clipboard. When you start a new application, you can paste the applicant information in the application and verify that it is correct.

**No matches?** If your applicant is not listed, you may choose to do another search for another member of the household.

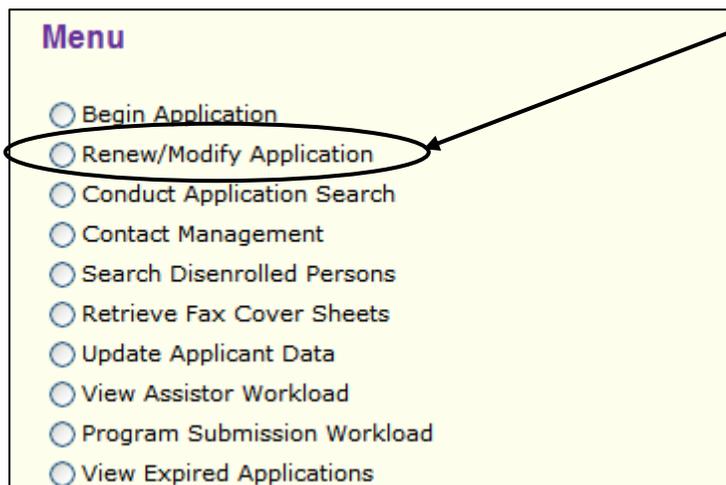
**Click on the appropriate mode to Begin a New Application**

- **Interview mode** is recommended when working directly with an applicant. It is the full set of questions and programs viewable page by page.

- **Data Entry mode** is the full application process but all in one continuous page. It is recommended when taking an application over the phone, or when agencies have a dedicated person entering data after the client interview.

# CAA Menu Functions: RENEW/MODIFY APPLICATION

## Renew/Modify Application



### Renewal:

- The process for renewals varies by program. See the table on the next page for more information.
- This function is available within the last three months of an applicant's coverage. You can automatically generate renewal notices for applicants from One-e-App.
- There will be a menu function to view applications that are 90, 60, and 30 days from their renewal due date for Healthy San Francisco and Healthy Kids & Young Adults.

### Modify:

- Use modify to make a change to an application that impacts eligibility, such as change in income, marital status, or a new child. See the table on the next page for more information.
- Applications can be modified after every member of the application has been submitted.

### Search Results

To renew or modify an application, click on the applicant's name. Applications that you are authorized to coauthor are highlighted.

### Expired or Program Closed Applications

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
No matching records were found.								

### Submitted Applications

	Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score	
<input type="checkbox"/>	Kathy Smith	1/1/1968	Liz Ramirez	11/22/2006	N/A	N/A	200632500027	31900005325067	100.00	
<input type="checkbox"/>	Janet Smith	3/3/1995	Liz Ramirez	11/22/2006	Healthy Kids	Fax	200632500027	31900007325065	65.40	

- Note:** Each indicates a renewal application.
- Note:** Each indicates a renewal application which has started and not completed through final eligibility review.
- Note:** Each indicates Program Closed application(s) / person(s).
- Note:** Each is a link to a person's application summary.
- Note:** Each is a link to add a person to the clipboard.

Total number of submitted persons : 2

Search   
 Renew/Modify   
 View Clipboard   
 Next

[Report a Bug/Make a Suggestion](#)  
[View Current Session Contents](#)

When "Renew/Modify Application" is chosen from the Menu, you will be routed to the **Search for Application** screen. The search results will show you two tables: *Expired or Program Closed* and *Submitted Applications*. One-e-App does not allow *Applications In Progress* or *Determined Applications Pending Submission* to be renewed or modified.

**Check the application from the list and click "Renew/Modify".**

**Application ID Assignment**  
 For each renewed application, a new Application ID number will be assigned.

## Renew/Modify Application (cont.)

<b>Modifications &amp; Renewals in One-e-App by Program</b>		
<b>Program</b>	<b>Modify</b>	<b>Renewals*</b>
Medi-Cal (through SF Human Services Agency)	Use Renew/Modify Menu Function in One-e-App to create a new application. HSA will conduct the regular file clearance to identify a previous application.	One-e-App will not do renewals. Contact HSA.
Medi-Cal for Children and Pregnant Women (through the State's Single Point of Entry)	Use Renew/Modify Menu Function in One-e-App.	Use Renew/Modify Menu Function in One-e-App so One-e-App has the most current information. You can choose to either submit the application through the Health-e-App interface or contact SPE directly.
Healthy Families	Use Renew/Modify Menu Function in One-e-App.	Use Renew/Modify Menu Function in One-e-App. Indicate application is a renewal on the Medi-Cal screen. This will create a pre-populated Annual Eligibility Renewal form that can be mailed or faxed to SPE.
Healthy Kids & Young Adults	Use Renew/Modify Menu Function in One-e-App.	One-e-App does not currently do renewals. Contact the SF Health Plan.
Healthy San Francisco	Use Renew/Modify Menu Function in One-e-App.	Use Renew/Modify Menu Function in One-e-App.
CHDP	No modify available.	Not applicable.

# CAA Menu Functions: CONDUCT APPLICATION SEARCH

## Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders

## Conduct Application Search

Conduct Application Search allows you to search for any application in the system.

## Search for an Application

Before beginning a new application, you must perform a search to find out whether the applicant (s) already exists in the system. Please specify at least two criteria or a unique identifier by which you would like to search.

### Person Detail

First Name

Middle Name

Last Name

Suffix

Legal Gender  Male  Female

Transgender  Yes  No

Date of Birth

### Person Place of Birth

California County  or

US State  or

Other Country

The search results can be further filtered by the assistor's name and a creation date range.

### Application Assistor

First Name

Last Name

### Creation Date Range

From

To

### Unique Identifier

Application ID

Person ID

SSN

MRN

ID Number

SFHP ID



## Application Search Tips

- Each additional criteria you enter narrows your search results further.
- If you search by Person Detail or Place or Birth, you must enter at least two criteria, such as First Name and Last Name OR First Name and Date of Birth.
- If you want to see all the application's you created, enter your name in the Application Assistor field.
- If you search by Unique Identifiers, such as Application ID, you only need to enter one criteria.

# CAA Menu Functions: CONDUCT APPLICATION SEARCH

## Search Results

To retrieve and continue with an application, click on the applicant's name. Applications that you are authorized to coauthor are highlighted in blue.

## Applications in Progress

Applicant Name	Date Of Birth	Created By	Creation Date	Application ID	Person ID	Score
No matching records were found.						

## Determined Applications Pending Submission

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Charles Sumer	7/31/1997	Judith Dispo	7/17/2007	CHDP	Fax	200719700789	33801011198076	60.00
Carla Sumer	12/31/1967	Judith Dispo	7/17/2007	Medi-Cal - Full Scope, No Share of Cost	Fax	200719700789	33801012198075	53.60
Childa Charlie	1/1/1987	Nancy Chan	7/25/2007	Medi-Cal - Full Scope, Share of Cost,	Fax	200720500335	33801107205074	50.40

## Expired or Program Closed Applications

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Cheryl Smith	1/1/2001	Sarah Boehm	7/24/2007	N/A	N/A	200720400536	N/A	100.00

## Submitted Applications

	Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
<input type="checkbox"/>	Cheryl Smith	1/1/1982	Sarah Boehm	7/23/2007	Medi-Cal - Full Scope, Share of Cost,	Fax	200720300033	33801035203076	100.00
<input type="checkbox"/>	Charlie Childa	1/1/1987	Sean Ha	7/17/2007	Medi-Cal - Full Scope, Share of Cost,	Fax	200719700029	33801012197077	50.40
<input type="checkbox"/>	Charlie Childa	1/1/1987	David Tran	7/24/2007	Medi-Cal - Full Scope, Share of Cost,	Fax	200720400254	33801048204079	50.40
<input type="checkbox"/>	Childa Charlie	1/1/1987	Jose Arinez	7/16/2007	Healthy Kids Young Adults	Fax	200719600484	33801083196073	50.40
<input type="checkbox"/>	Childa Charlie	1/1/1987	Sharon Kong	7/17/2007	Medi-Cal - Full Scope, Share of Cost,	Fax	200719700060	33801018197071	50.40

Note: Each indicates a renewal application.

Note: Each indicates a renewal application which has started and not completed through final eligibility review.

Note: Each indicates Program Closed application(s) / person(s).

Note: Each is a link to a person's application summary.

Note: Each is a link to add a person to the clipboard.

Note: Each is a link to Workflow History.

Note: Each is a link to Print Document and Forms.

Total number of applications in progress : 0  
 Total number of determined applications pending submission : 3

Total number of Expired and Program Closed Applications : 1  
 Total number of submitted persons : 5

## Conduct Application Search (cont.)

### SEARCH RESULTS TIPS

The Search Results will show you a score indicating the **percentage match** to the criteria you entered. If the match is above 90% the application will be highlighted in yellow.

The Search Results page is divided into four tables based on the application status:

- **Applications in progress**—Displays the application that is still in the interview process and the preliminary eligibility has not been determined.
- **Determined Applications Pending Submission**—Displays the applications that were determined preliminary eligible for different programs and are currently pending submission to the corresponding programs.
- **Expired Applications**—Displays the application that are expired due to incomplete submission.
- **Submitted Applications**—Displays the applications that were submitted to program(s). (Note: Applications must be submitted and have the verifications documents faxed in to be complete.)

For Submitted Applications you can view the **Application Submission Details** page by clicking on the person's name. This page will provide you with all the details and documents for that particular application.

If you want to check the **Enrollment History** for an applicant, check the box next to their name and click the icon.

## Contact Management

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications

The contact management function provides you with the ability to record and track contact with applicants, such as address changes, notices received, additional information needed and issues raised with you during phone calls or meetings.

You must conduct a search to locate the contact.



## Contact Management

Please specify any combination of the following criteria to search for an application and view the contact information.

### Person Detail

First Name

Middle Name

Last Name

Suffix

Gender  Male  Female

Date of Birth

### Person Place of Birth

California County  or

US State  or

Other Country

The search results can be further filtered by the assistor's name and a creation date range.

# CAA Menu Functions: CONTACT MANAGEMENT

## Contact Management (cont.)

**Contact Management**

To retrieve and continue with an application, click on the applicant's name.

**Applications in Progress**

Applicant Name	Date Of Birth	Created By	Creation Date	Application ID	Person ID	Score
No matching records were found.						

**Determined Applications Pending Submission**

Applicant Name	Date Of Birth	Created By	Creation Date	Retrieve Fax	Application ID	Score
Sandy Flores	5/17/2000	Liz Ramirez	11/21/2006	Fax	200632400186	86.95

**Submitted Applications**

Applicant Name	Date Of Birth	Created By	Created Date	Retrieve Fax	Retrieve Fax	Person ID
Sara Elizabeth Flores	8/24/1968	Liz Ramirez	11/21/2006	N/A	N/A	31900051324063

**Application Not Yet Started**

Contact Name	Date Of Birth	Created by	Creation Date	Application ID	Person ID
No matching records were found.					

**Note:** Each  indicates a renewal application.  
**Note:** Each  indicates a renewal application which has started and not completed through final eligibility review.  
**Note:** Each  indicates Program Closed application(s) / person(s).

Total number of applications in progress : 0  
Total number of submitted persons : 1

[Search](#) [Add New Contact](#) [Next](#)

[Report a Bug/Make a Suggestion](#)  
[View Current Session Contents](#)

Click on the person's name from the search results to modify their information.

OR

Add a new contact if the person was not found in the search results.



**Contact Details**

First Name

Middle Name

Last Name

Suffix

Gender  Male  Female

Date Of Birth

Email

Home Phone

Cell Phone

Work Phone

What language does this person speak best?

Add or edit their contact details.



# CAA Menu Functions: CONTACT MANAGEMENT

## Contact Management

Application ID: 200720400528

Related Applications: N/A

### Contact Search Criteria

#### Persons

All Persons

Susan Miller  Tommy Smith

#### Contacts

All Contacts

Letters  Phone Calls  Office Visit

#### Creation Date Range

From

To

Search Reset

### Funding Source List

Person Name	Funding Source	Created By	Date
Susan Miller	N/A	N/A	N/A
Tommy Smith	N/A	N/A	N/A

Add/Edit Funding Source

### Contact List

Contact Type	Description	Created By	Date
Phone Call	Client called in to change information	Sarah Boehm	08/11/2007

View/Edit Contact Add New Contact

### Application Follow Up Item

Person Name	Begin Date	Follow Up Item	Program	Status	Date Resolved	Delete
No matching records were found.						

View/Edit Follow Up Item Add New Follow Up Item Enrollment Verification

## Contact Management (cont.)

The Contact Management section allows you to track contacts with the applicant related to their application or referrals.

**Contact List:** This table allows you to create a list of contacts you have had with the applicant(s).

**Application Follow-up Item:** This table allows you to create a list of tasks needed to complete a particular application.

**Contact Type**

**Description**

**Contact Date**

**Contact Text**

**Action Item 1**

**Action Item 1 Status**

**Action Item 2**

**Action Item 2 Status**

### New Follow Up Item

Person(s)  All  Susan Miller  Tommy Smith

Begin Date

Follow Up Item

Program

Status

Date Resolved

Note

# CAA Menu Functions: SEARCH DISENROLLED PERSONS

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data

## Search Disenrolled Persons

This search function can provide information regarding any person who was disenrolled from the **Healthy Kids & Young Adults** or the **Healthy San Francisco** program.



### Disenrolled Participants Search Results

Disenrolled Participants						
	Participant Name	Date of Birth	Disenrollment Date	Disenrollment Effective Date	Reason for Disenrollment	App ID
<input type="checkbox"/>	Marshall Smith	1/1/1979	9/1/2007	9/1/2007	Enrolled in Public Coverage	200720300033

**Note:** Each  indicates a renewal application which has started and not completed through final eligibility review.

Conduct a search to locate the applicant. The resulting table will show you details about the disenrollment, such as the date and reason of disenrollment.

If the family has been disenrolled (for over a month) and would like to be added back to the program, you can mark the box next to the most current application button. This will start a new application with a link to the previous application.

*Note: For Healthy San Francisco applicants can be disenrolled for the following reasons: by request, ineligibility, non-payment, and non-compliance with re-screening.*

# CAA Menu Functions: RETRIEVE FAX COVER SHEETS

## Retrieve Fax Cover Sheets

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload

This function allows you to reprint the One-e-App Fax Cover Sheets already created for the application. You may need to do this if the applicant needs to fax in additional documentation or if you did not create one during the application submission process (See Fax tips on page 139).



### Retrieve Fax Cover Sheet

To retrieve a fax cover sheet, click on the 'fax' link for the application.

#### Determined Applications Pending Submission

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Christina Natomas	1/1/1997	Sarah Boehm	11/17/2006	Healthy Kids	N/A	200632000341	31900094320060	58.60

#### Expired or Program Closed Applications

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
No matching records were found.								

#### Submitted Applications

Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Cristiana Mayer	10/31/1997	Ashok K Rout Sr	11/9/2006	Healthy Kids	Fax	200631200397	N/A	68.05
Christina Andreas	12/12/1996	Simi Chandran	11/16/2006	N/A	Fax	200631900145	31900054319060	64.90

You will be prompted to conduct a search for the application. On the search results page, click on Fax under "Retrieve Fax" to view and print the fax cover sheets.



**oneeapp** Fax Cover Sheet  
Permanent Documents

Application ID 20072300033

Primary Informant: Marshall Smith  
Other Persons: Cheryl Smith, Tommy Smith.

Address: 1234 Main ST  
San Francisco, CA, Zip - 94101  
Home Phone: (415)555-5454

Please mark an "X" in the check box next to each document you are faxing. Example

Please fax to: 866-273-0555 or 916-779-4292

Documents Attached

- Medi-Cal
- Proof of Identification (Cheryl Smith, Marshall Smith, Tommy Smith)
- Healthy Kids Young Adults
- Proof of Identification (Cheryl Smith, Marshall Smith, Tommy Smith)
- Birth Certificate (Cheryl Smith, Marshall Smith, Tommy Smith)
- Healthy San Francisco
- Proof of Identification (Cheryl Smith, Marshall Smith, Tommy Smith)
- Child Health Disability Prevention Program
- CHDP Rights & Declarations (Tommy Smith)
- Informed Consent (Tommy Smith)
- DHS 4273 (Tommy Smith)

Notes

20072300033

**oneeapp** Fax Cover Sheet  
Temporary Documents

Application ID 20072300033  
Date: 7/23/2007

Primary Informant: Marshall Smith  
Other Persons: Cheryl Smith, Tommy Smith.

Address: 1234 Main ST  
San Francisco, CA, Zip - 94101  
Home Phone: (415)555-5454

Please mark an "X" in the check box next to each document you are faxing. Example

Please fax to: 866-273-0555 or 916-779-4292

Documents Attached

- Medi-Cal
- Proof of Pregnancy (Cheryl Smith)
- Healthy Kids Young Adults
- Proof of San Francisco County Residency (Marshall Smith, Tommy Smith)
- Healthy San Francisco
- Proof of San Francisco County Residency (Marshall Smith, Tommy Smith)

Notes

No Of Pages:

20072300033

# CAA Menu Functions: UPDATE APPLICANT DATA

## Update Applicant Data

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload

This menu function allows you to update addresses, telephone numbers, family names, including the primary informant.

You will be prompted to conduct an application search.

- Click on the box in the section that you would like to update data.
- Include an effective date of the change.
- Update the data and click on the Save icon.

**Profile of Joel Ruiz**

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**Primary Informant's Address and Contact Information**

Primary Informant's Address

Effective Date

<b>Home Address (do not use PO Box)</b>	<b>Mailing Address</b>
Delivery Type <input type="text" value="Street Address"/>	Delivery Type <input type="text" value="Street Address"/>
Street Number <input type="text" value="525"/>	Street Number <input type="text" value="525"/>
Prefix <input type="text" value="S"/>	Prefix <input type="text" value="S"/>
Street Name <input type="text" value="Ardmore"/> <input type="text" value="None"/>	Street Name <input type="text" value="Ardmore"/> <input type="text" value="None"/>
Post Direction <input type="text" value="---Select One---"/>	Post Direction <input type="text" value="---Select One---"/>
Unit Type and Number <input type="text" value="APT"/> <input type="text" value="12"/>	
City <input type="text" value="Los Angeles"/>	
State <input type="text" value="California"/>	
Zip <input type="text" value="90022"/> <input type="text" value=""/>	
County <input type="text" value="Los Angeles"/>	

Primary informant's Telephone

Effective Date

Home Phone

Cell Phone

Work Phone    X

Message Phone    X

---

**Person Details**

Demographics

Effective Date

First Name

Middle Name

Last Name

Suffix

SSN  Yes  No

SSN

Primary Informant's First Name

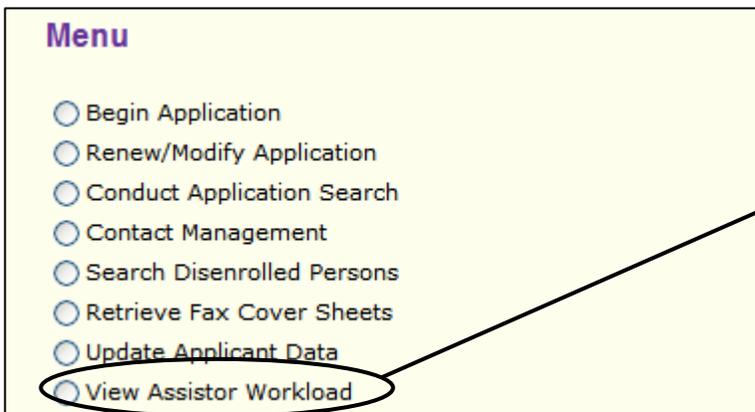
Primary Informant's Middle Name

Primary Informant's Last Name

Primary Informant's Preferred Spoken Language

Primary Informant's Preferred Written Language

# CAA Menu Functions: VIEW ASSISTOR WORKLOAD



## View Assistor Workload

This menu function assists you with the management of your applications.

When you select View Assistor Workload you will be navigated to three different workloads:

- Applications in Progress
- Determined Applications Pending Submission (for Healthy Kids & Young Adults)
- Submitted Applications Awaiting Disposition (for Healthy Kids & Young Adults)

To move from one workload to the next, click the "Next" icon.

# CAA Menu Functions: VIEW ASSISTOR WORKLOAD

**Applications in Progress**

	Due Date	Creation Date	Applicant Name	Application ID
<input type="checkbox"/>	1/29/2007	1/15/2007	Brian Lopez	200701400067

Note: Each indicates an extension of 2 days has been applied.  
 Note: Each indicates a reminder is associated to this application.  
 Note: Each indicates a renewal application.  
 Note: Each indicates application has been edited by another application assistor.

Reminders  
 Extend  
 Remove  
 Bring Back  
 Generate Notice  
 Next

[Report a Bug/Make a Suggestion](#)

## View Assistor Workload (cont.)

The Assistor Workload shows you the **Applications in Progress** table first. This displays applications that are still in the interview process for which preliminary eligibility has not been determined.

Click the “Next” icon to move to the next Assistor workload.

There are additional functions in this workload that can assist you in managing the application.

You can set a **reminder** by clicking on the little box near the due date of the applicant, then click reminder. You can add notes that will be linked with the application.

The **Extend** icon extends the application beyond the 90 days that are allowed to keep an application in progress. It will extend for two additional days. You can extend an application twice.

The **Remove** icon removes an application from your Applications in Progress workload. You will be prompted by the system to choose a reason for removal.

The **Bring Back** icon brings back an application that you removed. Once the application has been “brought back”, it will appear in this workload.

**Generate Notice** produces reminder letters for applicants when they have an incomplete application. One-e-App generates 1 and 15 day reminder letters. Once you click on “Generate Notice”, the system will produce the appropriate reminder letter that you can send to the applicant. →



# CAA Menu Functions: VIEW ASSISTOR WORKLOAD

## View Assistor Workload (cont.)

**Submitted Applications Awaiting Disposition**

	Application ID	Applicant Name	Assigned To
<input type="checkbox"/>	200632500027 <b>R</b>	Janet Smith	Ramirez , Liz
<input type="checkbox"/>	200633300054	Janie Montoya	Ramirez , Liz
<input type="checkbox"/>	200633400144 <b>R</b>	Jose Garcia	Ramirez , Liz
<input type="checkbox"/>	200633400144 <b>R</b>	Linda Garcia	Ramirez , Liz
<input type="checkbox"/>	200633400409 <b>R</b>	Carlos South	Ramirez , Liz
<input type="checkbox"/>	200634400010 <b>R</b>	June Bug	Ramirez , Liz
<input type="checkbox"/>	200634600064 <b>R</b>	Marco Martinez	Ramirez , Liz
<input type="checkbox"/>	200634700021	Mega Bucks	Ramirez , Liz

**Note:** Each **R** indicates a renewal application.  
**Note:** Each **E** indicates application has been edited by another application assistor.

**Generate Fax Cover**  **Next**

### Submitted Applications Awaiting Disposition

Submitted Applications Awaiting Disposition displays the applications that were submitted to the Healthy Kids & Young Adults program or Healthy San Francisco program and are still awaiting final disposition of their eligibility from SF Health Plan or DPH.

Click the “Next” icon to move to the next Assistor workload.



**Applications Submitted**

Status:    
 Days:    
 Submit Date Range:     To      
 Application ID:   
 First Name:   
 Last Name:   
 SSN:     
 Save current Status and Days as my default setting.

**Search** **Reset**

Number of Records Found **8**

Application ID	Applicant Name	Disposition Date	Status	Coverage Type	Reason for Denial
200632500027	Janet Smith		Pending	-	-
200633300054	Janie Montoya		Pending	-	-
200633400144	Jose Garcia		Pending	-	-
200633400144	Linda Garcia		Pending	-	-
200633400409	Carlos South		Pending	-	-
200634400010	June Bug		Pending	-	-
200634600064	Marco Martinez		Pending	-	-
200634700021	Mega Bucks		Pending	-	-

### Applications Submitted

This workload will give you the ability to view the list of applications that were submitted and disposition information (if available) for all Healthy Kids & Young Adults and Healthy San Francisco applications that have been submitted within a specified time frame (not just ones you created). Input the search criteria at the top of the page and click “Search” to locate a particular application.

# CAA Menu Functions: PROGRAM SUBMISSION WORKLOAD

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover

## Program Submission Workload

The Program Submission Workload contains two tables.

- Applications Pending Submission
- Applications Submitted



**Applications Pending Submission**

One-e-app APP ID	MSN	Applicant Name	Preliminary Eligibility	Coverage Type	System Name
No matching records were found.					

**Applications Submitted**

One-e-app APP ID	Applicant Name	Sent Date	Case ID	Preliminary Eligibility	Coverage Type	Remote System Name	Faxes
200632400186	Flores, Sandy	11/21/2006	2007414	Medi-Cal for Children and Pregnant Women	Primary	Health-e-App	N/A
200632400186	Flores, Toddy	11/21/2006	2007414	Medi-Cal for Children and Pregnant Women	Primary	Health-e-App	N/A
200632500027	Smith, Janet	N/A	N/A	Healthy Kids	Primary	N/A	N/A
200632500027	Smith, Micheal	11/22/2006	2007441	Medi-Cal for Children and Pregnant Women	Primary	Health-e-App	N/A

**Note:** Indicates Reconsidered Program.

Next

## Applications Pending Submission

These are applications that have passed the preliminary eligibility determination pages, the user has not completed all the information for the application and have not yet submitted the application.

## Applications Submitted

These are applications that have been submitted to a particular program for final disposition. You will also see individuals who were not eligible for not applying for coverage in this table.

# CAA Menu Functions: VIEW EXPIRED APPLICATIONS

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover

## View Expired Applications

Applications that have been in your Applications in Progress workload are automatically expired (removed) after 90 days, unless you extend the deadline. You can extend the deadline twice for 2 days each, for a total of 94 days. After that timeframe, the application will be removed from your workload and transferred to your CAA Supervisor's Expired Applications workload.



### Expired Applications

	Due Date	Creation Date	Applicant Name	App ID
<input type="checkbox"/>	8/23/2007	7/24/2007	Smith, Cheryl	200720400536

Note: Each indicates an extension of 2 days has been applied.

Note: Each indicates a renewal application.

Reminders Generate Notice

Next

If you want to continue the application after it has expired, your CAA Supervisor must assign it to you. Once your CAA Supervisor returns the application to your Applications in Progress workload, you have 90 days to submit it before it expires again.

# CAA Menu Functions: VIEW REMINDERS

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover

## View Reminders

The View Reminder function will allow you to view and print all reminder messages that you have created.

You can set reminders in the Application in Progress Workload. Refer to View Assistor Workload on page 28 to learn how.



**Reminders**

	Applicant Name	Reminder Messages	Due Date	Application ID
<input type="checkbox"/>	Karl Kigsely	Karl will return to finish application process on 1-24-07	01/24/2007	200702200045

Print  Next

# CAA Menu Functions: Health-e-App FAX COVER

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers

## Health-e-App Fax Cover

This function allows you to retrieve and print a Health-e-App fax cover sheet.

You will be prompted to conduct an application search.



**Search for an Application**

Before beginning an hea application, you must perform a search to find out whether the applicant(s) already exists in the system. Please specify at least two criteria or a unique identifier by which you would like to search.

**Person Detail**

First Name

Middle Name

Last Name

Suffix

Gender  Male  Female

Date of Birth

You can view and print the Health-e-App fax cover sheet by clicking on the Fax Hyperlink.

For faxing tips, see page 139.



**Search Results**

To retrieve fax cover of an application, click on the fax. Applications that you are authorized to coauthor are Listed.

**Health-E-App Submitted Applications**

Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Jennifer Head	5/5/2000	Liz Ramirez	5/2/2007	Healthy Families	<a href="#">Fax</a>	00712100086	31900011121070	63.50

Total number of applications submitted: 1



DCN 

health e app<sup>SM</sup> Documentation Fax Cover Sheet

\*\* This page must be the first page of the fax transmission \*\*  
\*\* Your documentation must be submitted within 24 hours \*\*

Date: June 01, 2007  
To: Healthy Families/Med-Cal  
Fax Number: 1-866-548-4376  
From: Arrow Head  
Address: 1111 W 5th St  
Los Angeles, 90017  
Phone: Home: (213) 222-2222  
Document Control Number: 20074420968

Document Checklist: Please check the appropriate box to indicate which documents you are attaching.

Signed Rights and Responsibilities Page  
 Proof of Income - pay stub, last year's federal income tax filing, etc.

# CAA Menu Functions: Pending Health-e-App Applications for CHDP

## Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers

## Pending Health-e-App Applications for CHDP Children

This menu function will list the applications that have been held 30 days for children that have been referred to the CHDP program. This will allow families to utilize the temporary full scope Medi-Cal that can be received by accessing the CHDP program.

A tickler is automatically sent to you after the 30 day hold has expired. This will alert you that your application is ready to be submitted to Health-e-App.

**Click on the One-e-App application ID and then click Submit.** The application is then batched with other applications that are pending submission. The batch is routed and sent to Health-e-App each night. Once the application has been successfully submitted they show up in "Submitted Health-e-App for CHDP children workload" where you can print the Health-e-App summary.

## Pending Health-e-App Applications for CHDP Children

	One-e-App APP ID	Person Name	Preliminary Eligibility	Received Date
<input checked="" type="checkbox"/>	200703500195	Ethan Jones	Medical for Children and Pregnant Women	02/05/2007
<input type="checkbox"/>	200703500195	Carol Jones	Healthy Families	02/05/2007
<input type="checkbox"/>	200704600051	Jackson Compass	Healthy Families	02/16/2007
<input type="checkbox"/>	200704600580	Sprinkle Rain	Healthy Families	02/16/2007
<input type="checkbox"/>	200704900030	Drift Wood	Healthy Families	02/19/2007
<input type="checkbox"/>	200704900030	Drift Wood	Healthy Families	02/19/2007
<input type="checkbox"/>	200705000012	Marcia Brady	Healthy Families	02/20/2007
<input type="checkbox"/>	200705800023	Grace Green	Healthy Families	02/28/2007
<input type="checkbox"/>	200705800023	Will Green	Healthy Families	02/28/2007
<input type="checkbox"/>	200706400054	Bavinara Lee	Healthy Families	03/06/2007
<input type="checkbox"/>	200713300057	Briggett Clark	Healthy Families	05/14/2007

 Submit

Next 

# CAA Menu Functions: SUBMITTED HEALTH-E-APP APPLICATIONS FOR CHDP

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children**
- View Ticklers
- View Faxes

## Submitted Health-e-App Applications for CHDP Children

This workload shows applications submitted to Health-e-App for CHDP children.

See also "Pending Health-e-App Applications for CHDP Children"



## Submitted Health-e-App Applications for CHDP Children

**Note:** Click DCN to view Health-e-app Summary

One-e-app APP ID	Person Name	Preliminary Eligibility	Hea-a-appid App ID	DCN	Fax	Submission Date
200719500221	Jerry Miller	Medi-Cal for Children and Pregnant Women	2017600	20075947636	Fax	7/17/2007

# CAA Menu Functions: VIEW TICKLERS

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers**

## View Ticklers

A tickler is a reminder that you can create for yourself. Some are sent to you by other users and some the system generates, such as a change password reminder. A link to your ticklers appears on the moving banner on the Menu page.

The **View Tickler** function allows you to:

- View all the ticklers you have added to the One-e-App system
- Add a new tickler



**Ticklers**

New	Active	Tickler Type	Description	Start Date	End Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	need to update my password on 3-3-07	2/16/2007	3/3/2007
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Required Documents	mom will bring in proof of income	2/20/2007	2/27/2007
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	update your password in Health e	2/28/2007	3/4/2007
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	CLIENT WILL COME IN TO FINSH APPL.	2/28/2007	3/25/2007
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	need to fax income verification on 3-23-07	3/12/2007	3/13/2007
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	need to update my passwords on such date	5/7/2007	6/11/2007
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Required Documents	please	5/14/2007	5/15/2007
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	I need to update my passwords next month	5/14/2007	6/13/2007



**Add New Tickler**

Tickler Type :

Description :

Start Date :

End Date :

### Tickler Types:

- General
- Required Documents
- Premium
- Appointment with client — Office Visit
- Appointment with client — Phone Call
- Application Modified.

# CAA Menu Functions: REPRINT FORMS

## Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Enrollment History
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes
- View Notes
- View Application Workflow History
- Assign Applications Transferred from CHDP user
- Change Medical Home
- Request ID Card/Materials
- Verification Documents

## Reprint Forms

This menu function will provide you the ability to re-print forms you have filled out or that you forgot to print before, such as:

- MC210 form
- Healthy Kids Rights and Declarations
- Income Self-Affidavits
- One-e-App Fax Cover Sheets
- Universal Summary
- Healthy Families Renewal forms

You will be prompted to conduct an application search.



Submitted Applications										
	Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score	
	Joel Ruiz	5/10/2005	Liz Ramirez	1/4/2007	Healthy Families	Fax	200700300037	31900005003078	100.00	
	Joel Ruiz	7/7/1970	Liz Ramirez	4/27/2007	N/A	N/A	200711600409	31900153116078	100.00	
	Joel Ruiz	7/7/1970	Liz Ramirez	5/4/2007	N/A	N/A	200712300082	31900153116078	100.00	
	Joselito Ruiz	10/14/1970	Karen Lauterbach	2/21/2007	N/A	N/A	200705100317	31900101051070	76.00	
	Raul Ruiz	3/13/1997	Karen Lauterbach	2/21/2007	N/A	N/A	200705100317	31900102051079	69.50	
	Juanito Ruiz	6/14/1991	Manju Kulkarni	12/11/2006	Healthy Kids	Fax	200634400374	31900107344065	67.50	
	Dan Ruiz	10/20/1965	Juana Felix	12/13/2006	N/A	N/A	200634600247	31900076346067	67.50	
	Lizzie Ruiz	2/2/2005	Liz Ramirez	4/27/2007	Healthy Kids	Fax	200711600409	31900154116077	64.00	

On the search results page, Click on the finger with a knot icon to go to the Print Documents and Forms Page.



# CAA Menu Functions: REPRINT FORMS

## Print Documents and Forms

Application ID: **200720300033**

Date Submitted: **7/23/2007**  
(5 days)

Person Information			
Person ID	Person Name	Date of birth	Gender
33801034203077	Marshall Smith	1/1/1979	Male
33801035203076	Cheryl Smith	1/1/1982	Female
33801036203075	Tommy Smith	1/1/2003	Male

## Self Affidavit of Income

Person Name	Income Type	Gross Monthly Amount	Document
Marshall Smith	Every 2 Weeks	\$1,083.50	<a href="#">Self Affidavit of Income Letter</a>
Cheryl Smith	Monthly	\$1,500.00	<a href="#">Self Affidavit of Income Letter</a>

## Verification Documents

Temporary Verification Documents	FAX 7/28/2007
Proof of Income	<input type="checkbox"/>
Proof of San Francisco County Residency	<input checked="" type="checkbox"/>
Proof of Pregnancy	<input type="checkbox"/>

Permanent Verification Documents	FAX 7/28/2007
Birth Certificate	<input type="checkbox"/>
Proof of Identification	<input checked="" type="checkbox"/>

## Rights and Declarations

Program Name	Document	Signed
Medi-Cal - Full Scope, No Share of Cost	<a href="#">MC210</a>	<input checked="" type="checkbox"/>
Medi-Cal - Full Scope, No Share of Cost	<a href="#">MC219</a>	<input checked="" type="checkbox"/>

- Language
- Generate Universal Summary
- Generate Fax Cover
- Next
- Healthy San Francisco Summary

## Reprint Forms (cont.)

This page provides you access to all the documents for a particular application including the materials that were faxed into the One-e-App system.

Click on the greenlinks or the "Fax" column header to view the documents.

# CAA Menu Functions: VIEW FAXES

## View Faxes

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes**

The View Faxes function will allow you to view and print the verification documents that were faxed using the One-e-App Fax Cover Sheet.

You will first be prompted to perform an application search.

On the search results page, Click on the name of the applicant. This will take you to the Application Details page.

### Submitted Applications

Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Susan Brownstick	7/4/1965	Liz Ramirez	11/29/2006	Medi-Cal for Children and Pregnant Woman	Fax	200633200221	31900062332063	100.00
Susana Brown	3/4/1970	Debbie Winski	12/4/2006	N/A	N/A	200633700345	31900092337066	95.50
Susan Smith	12/12/1970	Suresh Govindarajalu	12/11/2006	N/A	N/A	200634400697	31900146344068	68.00

On the Application Details page, Click on the column header that says "Fax" for either Temporary or Permanent documents.

For faxing tips, see page 139.

Application ID: 200633200221      Date Submitted: 11/29/2006 (24 days)

**Preliminary Eligibility for Programs**

Opt Out	Person ID	Person Name	Program Name	Coverage Type
<input type="checkbox"/>	31900062332063	Susan Brownstick	Medi-Cal for Children and Pregnant Women	Primary
<input type="checkbox"/>	31900064332061	Wendy Brownstick	Healthy Families	Primary
<input type="checkbox"/>	31900065332060	Katty Brownstick	Healthy Families	Primary

**Healthy Kids Disposition Details**

Assigned User:

Applicant Name	Disposition	Disposition Date	Coverage Type	Denial Reasons	Coverage Period
No matching records were found.					

**Verification Documents**

Temporary Verification Documents	FAX
Proof of Income	<input checked="" type="checkbox"/>
Proof of Los Angeles County Residency	<input checked="" type="checkbox"/>

# CAA Menu Functions: VIEW NOTES

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes
- View Notes**

## View Notes

This function allows you to view notes that have been added to each application. If a note is marked confidential, you will only be allowed to view it if you are from the same agency where the application was created.

You will first be prompted to perform an application search.

You will then be able to click on the Note icon associated with the applicant's file.

### View Notes

To view notes information, click on the 'notes' link for the application.

#### Applications in Progress

Applicant Name	Date Of Birth	Created By	Creation Date	Application ID	Person ID	Score	
Alpha Parenta	N/A	Sarah Boehm	7/17/2007	200719700359	N/A	N/A	
Harry Larson	N/A	Sarah Boehm	7/26/2007	1120072060036	N/A	N/A	

#### Determined Applications Pending Submission

Applicant Name	Date Of Birth	Created By	Creation Date	Program Name	Application ID	Person ID	Score	
Child One	5/12/1999	Sarah Boehm	7/17/2007	CHDP	200719700037	33801008197073	N/A	
Child One	5/12/1999	Sarah Boehm	7/17/2007	Medi-Cal for Children and Pregnant Woman	200719700037	33801008197073	N/A	
Mary Lamb	5/11/1932	Sarah Boehm	7/17/2007	Medi-Cal - Full Scope, No Share of Cost	200719700037	33801007197074	N/A	

### Application ID : 200719700037

MSN	Applicant Name	Notes Description	Creation Date
1	Mary Lamb	This is a note	07/26/2007
1	Mary Lamb	This is a confidential note.	07/26/2007

If you create a confidential note, it will be viewable by you and others in your organization only.

# CAA Menu Functions: VIEW APPLICATION WORKFLOW HISTORY

## View Application Workflow History

**Menu**

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes
- View Notes
- View Application Workflow History**

This function will provide you with a complete history of the application: application creation, preliminary eligibility determination, submission and if the application has expired.

You will be prompted to conduct an application search.

**Submitted Applications**

Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score
Joel Ruiz	5/10/2005	Liz Ramirez	1/4/2007	Healthy Families	Fax	200700300037	3190000500307	100.00
Joel Ruiz	7/7/1970	Liz Ramirez	4/27/2007	N/A	N/A	200711600409	31900153116078	100.00

To access the Application Workflow History, click on the stack of books icon.

**Workflow History for One-e-App Application ID: 200712300082 (Modified)**  
**Renew/Modify Application ID: 200711600409**

**Pre Preliminary Determination History**

Applicant Name	User Name	Status	Status Date	Person ID
Joel Ruiz	Liz Ramirez	Created	05/04/2007	31900153116078

**Post Preliminary Determination History**

Applicant Name	User Name	Program Name	Status	Status Date	Person ID
Lizzie Ruiz	Liz Ramirez	Child Health Disability Prevention Program	Applications Pending Submission	05/04/2007	31900154116077
Lizzie Ruiz	Liz Ramirez	Healthy Kids	Applications Pending Submission	05/04/2007	31900154116077
Lizzie Ruiz	Liz Ramirez	Healthy Kids	Signed Pending Submission	05/04/2007	31900154116077
Lizzie Ruiz	Liz Ramirez	Healthy Kids	Completion	05/04/2007	31900154116077
Lizzie Ruiz		Child Health Disability Prevention Program	Expired	05/19/2007	31900154116077

This will show you the Workflow History tables.

# CAA Menu Functions: ASSIGN APPLICATIONS TRANSFERRED FROM CHDP USER

## Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes
- View Notes
- View Application Workflow History
- Assign Applications Transferred from CHDP user
- China Town / NEMS Applications Workload
- Sliding Fee Scale Applications
- Request ID Card/Materials

## Assign Applications Transferred from CHDP User

This menu function takes you to the applications that have been referred to you by a CHDP user for a full One-e-App screen.

(Note: A CHDP User has a "CHDP Provider" User Type in One-e-App. See page 117 for more information regarding CHDP Gateway submission.)

You will receive a tickler notifying you that an application is in this workload.

On this page, select the application you want to continue and click "Pick". It will start a full application with the data entered by the CHDP Provider pre-populated. You will need to complete all the missing data elements on each page to continue.

## Assign Applications Transferred from CHDP user

	<u>Due Date</u>	<u>Creation Date</u>	<u>Applicant Name</u>	<u>Application ID</u>
<input checked="" type="checkbox"/>	8/8/2007	7/25/2007	La Test, Sandra	200720500251

 Pick

Next 

# CAA Menu Functions: REQUEST ID CARD/MATERIALS

## Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes
- View Notes
- View Application Workflow History
- Assign Applications Transferred from CHDP user
- China Town / NEMS Applications Workload
- Sliding Fee Scale Applications
- Request ID Card/Materials

## Request ID Card/Materials

- This menu function allows you to request an ID Card or Materials for a **Healthy San Francisco** applicant.

IMPORTANT NOTE: One-e-App does not generate the HSF ID cards. The request will be sent electronically to a vendor who will send the ID card to the mailing address.

- You will be prompted to conduct an application search.



# CAA Menu Functions: REQUEST ID CARD/MATERIALS

## Submitted Applications

	Applicant Name	Date Of Birth	Submitted By	Submission Date	Program Name	Retrieve Fax	Application ID	Person ID	Score	
<input type="checkbox"/>	Cheryl Smith	1/1/1982	Sarah Boehm	7/23/2007	Medi-Cal - Full Scope, Share of Cost,	Fax	200720300033	33801035203076	N/A	
<input checked="" type="checkbox"/>	Marshall Smith	1/1/1979	Sarah Boehm	7/23/2007	Healthy San Francisco	Fax	200720300033	33801034203077	N/A	
<input type="checkbox"/>	Tommy Smith	1/1/2003	Sarah Boehm	7/23/2007	Healthy Kids Young Adults	Fax	200720300033	33801036203075	N/A	

## Request ID Card/Materials (cont.)

This menu function allows a CAA to request an ID Card or Materials for a Healthy San Francisco applicant.

- You will be prompted to conduct an application search. In the search results, check the box for applicant and click "ID Card and Materials".
- On the next screen, select which items you want and for which applicant.
- The next page shows a summary of the request.

- Note:** Each indicates a renewal application.
- Note:** Each indicates a renewal application which has started and not completed through final eligibility review.
- Note:** Each indicates Program Closed application(s) / person(s).
- Note:** Each is a link to a person's application summary.
- Note:** Each is a link to add a person to the clipboard.
- Note:** Each is a link to Workflow History.
- Note:** Each is a link to Print Document and Forms.

Total number of applications in progress : 4  
 Total number of determined applications pending submission : 5  
 Total number of Expired and Program Closed Applications : 0  
 Total number of submitted persons : 3

Search

ID Card and Materials

Next

## Request ID Card and Participant Materials

Notes

Request Replacement ID Card  Yes  No

Marshall Smith

Request Replacement Participant Materials  Yes  No

Marshall Smith

## Request ID Card and Participant Materials Summary

Application ID 200720300033

Participant Name Marshall Smith

Request Replacement ID Card Yes

Request ID Card Effective Date 8/1/2007

Request Replacement Participant Materials Yes

Request ID Card Effective Date 8/1/2007

# CAA Menu Functions: VERIFICATION DOCUMENTS

## Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Enrollment History
- Update Applicant Data
- View Assistor Workload
- Program Submission Workload
- View Expired Applications
- View Reminders
- Health-e-App Fax Cover
- Pending Health-e-App Applications for CHDP Children
- Submitted Health-e-App Applications for CHDP Children
- View Ticklers
- Reprint Forms
- View Faxes
- View Notes
- View Application Workflow History
- Assign Applications Transferred from CHDP user
- Change Medical Home
- Request ID Card/Materials
- Verification Documents

## Verification Documents

This menu function takes you to the pages for verification document tracking after you do an application search.

### Document Verification

Notes

Please check all that Apply

#### Alvarez, Jose

- Proof of Income (Healthy Kids Young Adults, Medi-Cal, Medi-Cal for Children and Pregnant Women)
  - Verification:
  - Source:
- Proof of Identification (Medi-Cal)

#### Alvarez, Maria

- Proof of Income (Medi-Cal)
  - Verification:
  - Source:
- Proof of Pregnancy (Medi-Cal)
- Proof of Identification (Medi-Cal)

#### Alvarez, Reuben

- CHDP Rights & Declarations (Child Health Disability Prevention Program)
- Informed Consent (Child Health Disability Prevention Program)
- DHS 4073 (Child Health Disability Prevention Program)
- Proof of Identification (Healthy Kids Young Adults)
- Birth Certificate (Healthy Kids Young Adults, Medi-Cal for Children and Pregnant Women)

### Verification Document Summary

Notes

Member Name	Verification Document	Verification	Source	Program Name
Jose Alvarez	Proof of Identification			Medi-Cal
Jose Alvarez	Proof of Income	Received	Pay Stub,Tax Return,Employer Letter	Medi-Cal
Jose Alvarez	Proof of Income	Received	Pay Stub,Tax Return,Employer Letter	Healthy Kids Young Adults
Jose Alvarez	Proof of Income	Received	Pay Stub,Tax Return,Employer Letter	Medi-Cal for Children and Pregnant Women
Maria Alvarez	Proof of Identification			Medi-Cal
Maria Alvarez	Proof of Income	Not Received		Medi-Cal
Maria Alvarez	Proof of Pregnancy			Medi-Cal
Reuben Alvarez	CHDP Rights & Declarations			Child Health Disability Prevention Program
Reuben Alvarez	DHS 4073			Child Health Disability Prevention Program
Reuben Alvarez	Informed Consent			Child Health Disability Prevention Program
Reuben Alvarez	Birth Certificate			Healthy Kids Young Adults
Reuben Alvarez	Proof of Identification			Healthy Kids Young Adults
Reuben Alvarez	Proof of San Francisco County Residency			Healthy Kids Young Adults
Reuben Alvarez	Birth Certificate			Medi-Cal for Children and Pregnant Women
Reuben Alvarez	Proof of San Francisco County Residency			Medi-Cal for Children and Pregnant Women

