CHAPTER 5
CAA Supervisors

CAA Supervisors: LOGGING ON

User Login

You have the following User Types.

Please select one user type to proceed   -----Select One-----

-----Select One-----
Certified Application Assistant
CAA Supervisor

CAA Supervisor Login

To access the CAA Supervisor Menu, log on using the "CAA Supervisor" User Type.

Every CAA must be assigned to a CAA Supervisor. The CAA Supervisor is someone who can view the status of and manage applications of all the CAAs assigned to them. A CAA Supervisor must also be a CAA.

A CAA Supervisor has all the menu functions a CAA has, plus three additional functions:

- View Supervisor Workload Summary

- Review Supervisor Expired Applications

- Unassigned Applications from CHDP

Menu

- Begin Application
- Renew/Modify Application
- Conduct Application Search
- Contact Management
- Search Disenrolled Persons
- Retrieve Fax Cover Sheets
- Enrollment History
- Review Supervisor Expired Applications
- Update Applicant Data
- View Supervisor Workload Summary
- View Assistor Workload
- Program Submission Workload
- View Reminders
- Health-e-App Fax Cover
- View Ticklers
- Manage Program Disposition
- View Faxes
- View Notes
- Print Paper Application
- Unassigned Applications from CHDP
- Request ID Card/Materials
- Change Medical Home
- Verification Documents

CAA Supervisors:

Supervisor Workload Summary

Menu

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

The Supervisor Workload Summary displays the following information for each user who reports to that supervisor.

Supervisors can narrow the information displayed on this workload by selecting Assistor name or Program name from the drop down list at the top and clicking Search. If no filter is applied, then information for all Assistors and Programs will appear below.

Supervisor Workload Summary

User Name [All]
Program [All]
☐ Save current selections as my default settings

🛡 Search 🔴 Reset

◀◀ Page: 1 of 1 ▶▶

Liz Ramirez (SC)

Interviews in Progress: 0

Program Name	Persons Determined Preliminarily Eligible	Persons Submitted
CHDP	0	0
Healthy Families	0	0
Healthy Kids	0	0
Medi-Cal for Children and Pregnant Women	0	0

Total Interviews in Progress for Lramirez: 0
Total Members Determined Preliminarily Eligible for Lramirez: 0
Total Members Submitted for Lramirez: 0

Grand Total

Total Interviews in Progress: 0
Total Persons Determined Preliminarily Eligible: 0
Total Persons Submitted: 0

- **Interviews in progress** – Displays the count of applications that are still in the interview process and the preliminary eligibility has not been determined. Click on the count to navigate to that particular user's Applications in Progress Workload.

- **Persons Determined Preliminarily Eligible** (by Program) – Displays the number of applications who were determined preliminarily eligible for different programs. Click on the count to navigate to that particular user's Program Submission Workload.

- **Persons Submitted** (by Program) – Displays the count of applicants who were determined preliminarily eligible for different programs and have been submitted for the program for which they qualified. Clicking on the count to navigate to that particular user's Program Submission Workload.

Supervisor Workload Summary

User Name [All ▾]
Program [All ▾]
☐ Save current selections as my default settings

🔴 Search 🔴 Reset

Sarah Boehm (CAA)

Interviews in Progress: 1

Program Name	Persons Determined Preliminarily Eligible	Persons Submitted
Medi-Cal - Full Scope, No Share of Cost	0	1
Medi-Cal - Full Scope, No Share of Cost	0	0
Medi-Cal - Full Scope, No Share of Cost	0	0
Healthy Families	0	0
Healthy Kids and Young Adults	0	0
Healthy Kids Young Adults	0	1
Healthy San Francisco	0	1
Medi-Cal for Children and Pregnant Women	0	0

Total Interviews in Progress for Sboehm: **1**
Total Members Determined Preliminarily Eligible for Sboehm: **0**
Total Members Submitted for Sboehm: **3**

Applications in Progress for Sarah Boehm

		Due Date	Creation Date	Applicant Name	Application ID
☐		8/23/2007	7/24/2007	Cheryl Smith	200720400536

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

📋 Reminders 🟡 Extend 🔴 Remove   🟠 Assign   Next ▶

Assign Applications of Sarah Boehm

Due Date	Creation Date	Applicant Name	App ID	Assign Application To
8/23/2007	7/24/2007	Dearest, Mommie	200720400528	---Select One--- ▾

Next ▶

Assign Applications

If an application is in progress, a Supervisor can assign it to another user to complete.

• Click on the green number next to "Interviews in Progress" to view the applications in progress for that user.

• Check the box next to the application and Click "Assign"

• Select another user from the "Assign Applications" drop down list.

CAA Supervisors: UNASSIGNED APPLICATIONS FROM CHDP

Assign Applications Transferred from CHDP user

	Due Date	Creation Date	Applicant Name	Application ID
☐	7/29/2007	7/15/2007	L A Test, Sandra	200719500296

Pick   Next

Unassigned Applications from CHDP

CAA Supervisors can view and assign applications from this workload that have been referred from a CHDP Provider User Type for a full One-e-App screen.

Menu

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

Review Supervisor Expired Applications

This Menu function will provide you with a workload of expired applications from the assistor's assigned to you.

Check the box next to the application and select the Application Status from the drop down box. You can either close the application or return it to the worker who created it. After it has been returned to the worker, they have 90days to finish it before it expires again.

Expired Applications

		Due Date	Applicant Name	Assistor Name	App ID	Program	MSN	Reason	App Status
☑		7/25/2007	Smith, Cheryl	Sarah Boehm	200720400536	N/A	1	Expired	Return to Worker ▾
									Close Application
									Return to Worker

Note: Each R indicates a renewal application.

Total no. of Expired Applications: 1

Total no. of Removed Applications:
Duplicates: 0
Withdrawals: 0

🔲 Reminders   Next ▶