



CDSS

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DEPARTMENT OF SOCIAL SERVICES

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Date

ALL COUNTY LETTER 15-XX

REASON FOR THIS TRANSMITTAL

- State Law Change
- Federal Law or Regulation Change
- Court Order
- Clarification Requested by One or More Counties
- Initiated by CDSS

TO: ALL COUNTY WELFARE DIRECTORS
ALL IN-HOME SUPPORTIVE SERVICES (IHSS) PROGRAM MANAGERS

SUBJECT: **IMPLEMENTATION OF BLIND AND VISUALLY IMPAIRED (B&VI) RECIPIENT REASONABLE ACCOMMODATIONS AND TRACKING IN CASE MANAGEMENT, INFORMATION, AND PAYROLL SYSTEM (CMIPS) AND TELEPHONE TIMESHEET APPROVAL SYSTEM**

REFERENCE: [ACIN NO. 1-25-15](#), DATED APRIL 29, 2015

The purpose of this ACL is to inform County Welfare Departments (CWDs) of additional resources that will be available to the CWDs, as part of their ongoing responsibility to offer and provide alternate-format documents as reasonable accommodations to Blind or Visually Impaired (B&VI) IHSS applicants and recipients to ensure meaningful access to IHSS program materials and information. In addition, this ACL provides the counties with information and instructions for the implementation of system changes in the Case Management, Information, and Payroll System (CMIPS) related to blind and visually impaired (B&VI) recipient assessment documentation and the Telephonic Timesheet Approval System (TTAS).

BACKGROUND

IHSS recipients are responsible for reviewing and approving their provider(s) timesheets prior to submission of the timesheet for payment of IHSS provided to his/her recipient. To assist B&VI applicants and recipients, the California Department of Social Services (CDSS) is now making available additional resources to assist in providing reasonable accommodation to In-Home Supportive Services (IHSS) B & VI applicants and recipients to ensure meaningful access to the IHSS Program as required by the Americans with Disabilities Act (ADA). CMIPS has been modified to implement some of these accommodations. These accommodations must be

offered to a B&VI authorized representative for an IHSS B&VI applicant or recipient when necessary to ensure meaningful access to IHSS resources for the B&VI applicant or recipient.

B&VI Accommodations Implementation Schedule

Earlier this year, CDSS and Alameda, Sacramento and Santa Clara counties conducted a pilot testing of the Telephone Timesheet Approval System (TTAS), as described below. In April 2015, the pilot counties along with blind IHSS recipient volunteers participated in the pilot testing. In May 2015, the (TTAS) pilot testing included the use of new screens in CMIPS, as well as modifications to data download and the Recipient Summary Characteristics Listing report. In August 2015, TTAS will be available statewide to all counties in providing additional resources to provide meaningful access to the IHSS program for B&VI applicants and recipients. Additional resources for accommodations will include: large font timesheets, revised form Application for Social Services (SOC 295), large font and Braille NOAs, and NOAs in CD format (Audio and Text formats). In September 2015, the Needs Assessment form (SOC 293) will be revised and available for county use.

CMIPS Functionality Updates

CMIPS has been modified to allow B&VI IHSS recipients requesting reasonable accommodations to indicate their preference for accessing IHSS program information. CMIPS now includes:

- New screens, business rules, and error messages to the IHSS application to allow county IHSS workers to enter the reasonable accommodation preferences requested by B&VI IHSS applicants and recipients when offered during an assessment or reassessment;
- The new interactive TTAS that will allow a blind IHSS recipient, via an auditory process, to review and approve or reject by electronic signature an IHSS provider(s) timesheet(s) submitted for payroll processing. A blind IHSS recipient who is enrolled in the new TTAS will be required to choose a 4-digit numeric Recipient Authentication Number (RAN) to be entered along with their IHSS case number, via the telephone. This will enable the recipient to hear the information documented on the provider timesheet and to approve or reject it by electronic signature. This accommodation will be available to VI recipients when it is determined, through an interactive process between the county and the VI recipient, that other accommodations will not meet the needs of the VI recipient to ensure meaningful access to the required timesheet approval process; and
- The Recipient Characteristics Summary Listing report and data download file, which have been modified to facilitate the documentation of the reasonable accommodation preferences requested by B&VI IHSS recipients.

B&VI Recipient – Forms Updates

Beginning August 1, 2015, or a later date as specified below, counties will have access to and be required to use the following forms, which have been updated to ensure that B&VI IHSS applicants and recipients have access to IHSS program related information as required by the ADA. These updates include:

- Notice of Action (NOA) forms in 18-point font (NA1250L, NA1251L, NA1252L, NA1253L, NA1254L, NA1255L, NA1256L, NA1257L, NA IHSS Back, and Description of Services) in English, Spanish, Chinese and Armenian languages
- IHSS Arrears timesheet (SOC2261L) in 18-point font;
- NOAs in Braille (service available in Fall of 2015);
- NOAs in audio and text format (NA1250L, NA1251L, NA1252L, NA1253L, NA1254L, NA1255L, NA1256L, NA1257L, NA IHSS Back, and Description of Services) available on a CD; and
- Modifications to the assessment intake forms that will include a new section to document the reasonable accommodation preferences requested by a B&VI IHSS applicant or recipient. Initially, changes will only be made to the SOC 295 form. Changes to the Needs Assessment Form (SOC 293) will be made in September 2015. Modifications to SOC 293 and SOC 295 include the new fields for county IHSS workers to capture B&VI recipient accommodation preferences.

Notice of Action (NOA) in 18-point font

Beginning August 1, 2015, the following NOAs will be available in 18-point font: NA1250L, NA1251L, NA1252L, NA1253L, NA1254L, NA1255L, NA1256L, NA1257L, NA IHSS Back, and Description of Services. There are no content or process changes for 18-point font NOAs, since these NOAs will be completed, printed, and mailed by the counties when needed for B&VI recipients. The current county printers can accommodate and print the 18-point font format continuing to use legal size paper.

IHSS Arrears Timesheet (SOC 2261L)

Beginning August 1, 2015, the current IHSS Arrears Timesheet will be available in 18-point font for county use. The large 18-point font IHSS Arrears timesheet will be processed at the Timesheet Processing Facility (TPF) in the same manner as is currently used for the standard, non-18-point font IHSS Arrears Timesheet. Printing and reprinting of the 18-point font timesheet will be completed at the Vendor (Hewlett Packard) Print Center through batch processing. Timesheet instructions will be printed on a separate page to accompany the timesheet.

Notice of Action (NOA) in Braille

In approximately October or November 2015, the following NOAs will be available for B&VI recipients requiring this Braille accommodation: NA1250L, NA1251L, NA1252L, NA1253L, NA1254L, NA1255L, NA1256L, NA1257L, NA IHSS Back, and Description of Services. Braille NOAs will be produced and mailed by the vendor (Hewlett Packard) directly to B&VI recipients. Counties will not have to purchase braille printers. Counties will print and mail only the non-braille 18-point font NOAs.

Notice of Action (NOA) on a CD – Audio and Text Files

In addition to the above-noted accommodations, NOAs will be produced and recorded on a CD in both audio and text format for recipients who are blind or visually impaired and have requested the audio or text format CD. Audio or text NOAs will be available as specified below in the following languages:

- English – English text and English audio;
- Spanish – Spanish text and Spanish audio;
- Chinese – Chinese text and Chinese audio;
- Armenian – Armenian text and no audio; and

Forms Tracking in CMIPS

CMIPS screens have been modified to document the reasonable accommodation preferences requested by B&VI IHSS recipients that will be documented on the revised SOC 295 form (available in August 2015) and the updated SOC 293 (available in September 2015). Since the SOC 295 is formatted differently than the CMIPS screens, it is important that county IHSS workers understand how to navigate the SOC 295 form options to accurately document the information in the screen options.

Revised Application for Social Services (SOC 295)

CDSS revised the Application for Social Services (SOC 295), which now includes a new section titled, Section 7- Communication Accommodations. This new section allows an IHSS applicant or recipient to be identified as either blind or visually impaired. B&VI IHSS applicants and recipients will then be prompted to select an alternate format (e.g., TTAS, large-font documents, data CD, audio CD, or Braille) to ensure meaningful access to the IHSS documentation .

COUNTY RESPONSIBILITIES

Counties have a continuing obligation to provide reasonable accommodation to B&VI applicants and recipients to ensure access to IHSS. As part of that obligation, counties shall ensure that B&VI applicants and recipients are informed of the accommodations described in this ACL and that they are made available. This continuing obligation requires the county to provide alternate format options of program materials to a B/VI person who inquires or requests information about the IHSS program.

Needs Assessment Form (SOC 293)

CDSS is revising the IHSS Needs Assessment Form (SOC 293), to record the alternate format preferences requested. The IHSS county worker will need to determine if the IHSS applicant or recipient is blind or visually impaired. If determined to be blind or visually impaired, the IHSS social worker will ask the applicant or recipient for his/her alternate format preference. The IHSS social worker will explain the alternate format options and equipment needed to utilize the options, including the ability to request reasonable specialized formats other than the standard formats listed above. The IHSS social worker will then indicate on the revised SOC 293 form the IHSS applicant or recipient's choices. The revised SOC 293 will be available for county IHSS social workers to use by September 2015.

SOC 295 - New Fields in CMIPS

When the "Blind or Visually Impaired" link is selected from the Cases Left Navigation, the *Blind or Visually Impaired* screen displays. This screen displays the current, active B&VI record associated with the case (see Figure 1).

The screenshot shows the Case Worker Application interface. On the left is a navigation pane with a tree view of cases. The 'Blind or Visually Impaired' link is highlighted. The main content area displays the record for 'Blind or Visually Impaired: Dana Logan 0010193'. Below the title bar is a table with the following data:

Action	Blind or Visually Impaired	Timesheet Option	Notice of Action Option	IHSS Required Forms Option	Created By	From	To
View Edit	Blind	Telephonic System	Braille Documents	Braille Documents	John Smith	1/20/2015 11:10	12/31/9999 12:00

Figure 1 – *Blind or Visually Impaired* screen

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When the “New” link is selected from the *Blind or Visually Impaired* screen, the *Create Blind or Visually Impaired* screen displays (see Figure 2). This screen is used to create a new B&VI record.

The screenshot shows the 'CASE WORKER APPLICATION' interface with a sidebar menu on the left and a main content area. The sidebar menu includes categories like Evidence, Contacts, Overtime, Timesheet, Payroll, and Administration. The main content area is titled 'Create Blind or Visually Impaired' and features a yellow header bar with 'Save' and 'Cancel' buttons. Below the header, there is a form with the following fields: 'Blind or Visually Impaired:' (a dropdown menu), 'Notice of Action Option:' (a dropdown menu), 'Timesheet Option:' (a dropdown menu), 'Recipient Authentication Number:' (a text input field), and 'IHSS Required Forms Option:' (a dropdown menu). The 'Save' and 'Cancel' buttons are repeated at the bottom of the form area.

Figure 2 – *Create Blind or Visually Impaired* screen

When the “Edit” link is selected from either the *Blind or Visually Impaired* screen, or the *View Blind or Visually Impaired* screen, the *Modify Blind or Visually Impaired* screen displays (see Figure 3). This screen is used to modify an existing B&VI record.

The screenshot shows the 'CASE WORKER APPLICATION' interface with a sidebar menu on the left and a main content area. The sidebar menu is identical to Figure 2. The main content area is titled 'Modify Blind or Visually Impaired' and features a yellow header bar with 'Save' and 'Cancel' buttons. Below the header, there is a 'Details' section with 'Created By: John Smith' and 'Created On: 01/20/2015'. Below the details, there is a form with the following fields: 'Blind or Visually Impaired:' (a dropdown menu), 'Notice of Action Option:' (a dropdown menu), 'Timesheet Option:' (a dropdown menu), 'Recipient Authentication Number:' (a text input field), and 'IHSS Required Forms Option:' (a dropdown menu). The 'Save' and 'Cancel' buttons are repeated at the bottom of the form area.

Figure 3 – *Modify Blind or Visually Impaired* screen

When the “View” link is selected from the *Blind or Visually Impaired* screen or for a specific record on the *Blind or Visually Impaired History* screen, the *View Blind or Visually Impaired* screen displays (see Figure 4). This screen is used to view a current or previous B&VI record.

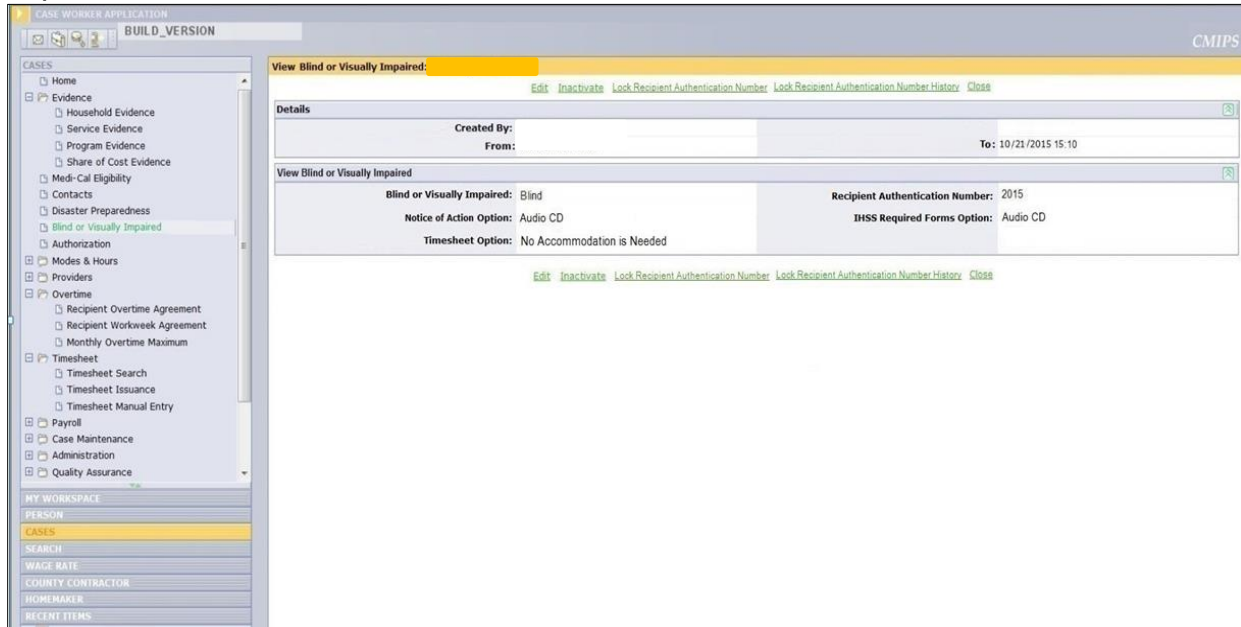


Figure 4 – *View Blind or Visually Impaired* screen

When the “History” link is selected from the *Blind or Visually Impaired* screen, the *Blind or Visually Impaired History* screen displays (see Figure 5). This screen lists the history of B&VI records associated with the case. The default sort displays the most recent B&VI record at the top of the list.

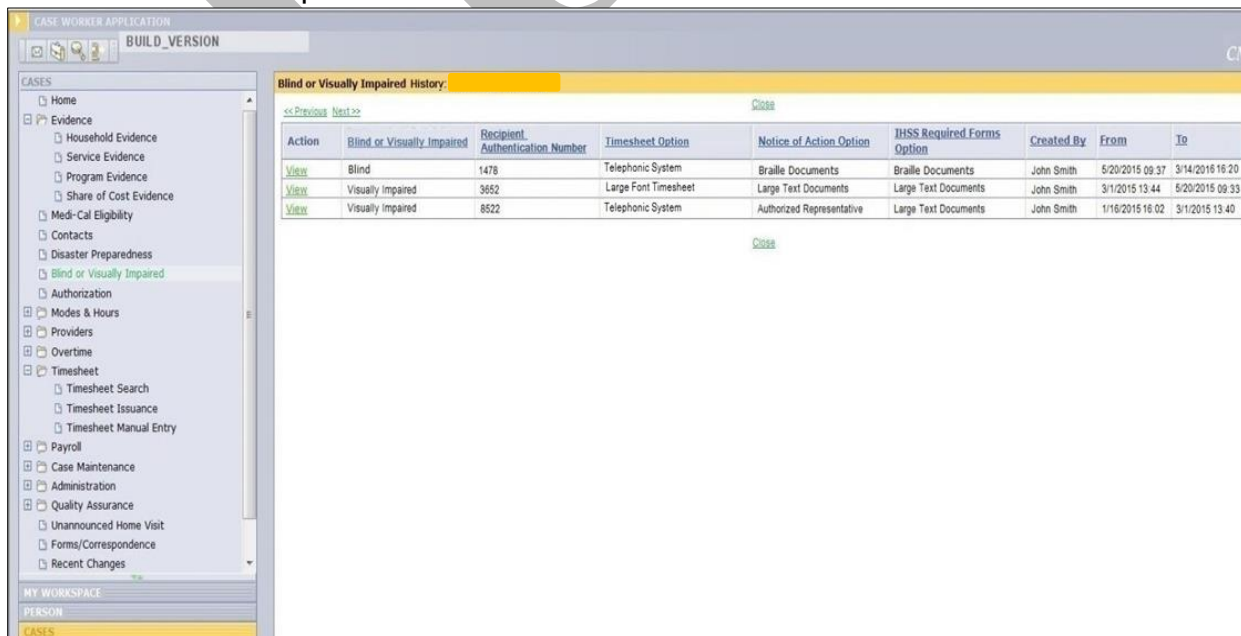


Figure 5 – *Blind or Visually Impaired History* screen

The IHSS B&VI applicant or recipient can indicate/request different format preferences for the NOA during initial assessment or reassessment or when requested by the applicant or recipient. Depending on the selection, the NOA generation and triggers will be different.

No	When	Action
1	When the No Accommodation is Needed Option is selected	CMIPS will generate and mail the standard PDF NOA
2	If the Notice of Action Option of Braille Documents is selected	Until Braille Documents become available the CMIPS will: <ul style="list-style-type: none"> • Generate and mail the standard PDF NOAs When Braille Documents become available the CMIPS will: <ul style="list-style-type: none"> • Generate and mail the Braille NOAs AND <ul style="list-style-type: none"> • Generate and mail the standard PDF NOAs
3	When the Notice of Action Option of Audio CD is selected	Until Audio CD becomes available the CMIPS will: <ul style="list-style-type: none"> • Generate and mail the standard PDF NOAs; When Audio CD NOAs become available the CMIPS will: <ul style="list-style-type: none"> • Generate and mail the CD NOAs AND <ul style="list-style-type: none"> • Generate and mail the standard PDF NOAs
4	When The Notice of Action Option of Data CD is selected	Until Data CD becomes available the CMIPS will: <ul style="list-style-type: none"> • Generate and mail the standard PDF NOAs; When Data CD NOAs become available the CMIPS will: <ul style="list-style-type: none"> • Generate and mail the CD NOAs AND <ul style="list-style-type: none"> • Generate and mail the standard PDF NOAs
5	When The Notice of Action Option of Large Font NOA is selected	Until Large Font NOAs become available the CMIPS will: <ul style="list-style-type: none"> • Generate and mail the standard PDF NOAs; When Large Font NOAs become available the CMIPS will:

No	When	Action
		<ul style="list-style-type: none"> • Generate and mail the Large Font NOAs

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Modified Report

Screens have been added to capture and manage the B&VI recipient's correspondence delivery format and TTAS preferences, which are recorded from either an application for IHSS Services (SOC 295) or the B&VI recipient's reassessment (SOC 293). B&VI recipient preference selections will be available both in data downloads and in CMIPS reporting.

Description of change: The below changes will be made to the Recipient Summary Characteristics Listing report (see Figure 6).

- **BLIND OR VISUALLY IMPAIRED INDICATION FOR TELEPHONIC TIMESHEET APPROVAL USE** – The count of recipients using the TTAS self-indicated with the status of Blind or Visually Impaired as of the end of the reporting month.
- **B&VI TIMESHEET OPTION** - The count of recipients indicated as receiving the B&VI timesheet or not as of the end of the reporting month.
- **B&VI CORRESPONDENCE DELIVERY OPTION** - The count of recipients with the indicated B&VI Correspondence Delivery Option as of the end of the reporting month.

COUNTY: VOLU		STATE OF CALIFORNIA				PAGE: 3
		IN-HOME SUPPORTIVE SERVICES				CYCLE DATE: 04/01/2014 TO 04/30/2014
		RECIPIENT SUMMARY CHARACTERISTICS LISTING				RUN DATE: 10/22/2014 TIME: 14:53:29
CATEGORY	TOTAL IHSS CASES	CPD	PCSP	IPD	IHSS-R	
ELIGIBILITY BASED ON AGE						
19 - AGED	514	0	490	3	21	
20 - SCIPD	43	0	31	1	11	
60 - DISABLED	1,024	0	714	59	251	
19 - AGED INCOME ELIGIBLE	154	0	124	3	27	
20 - SCIPD INCOME ELIGIBLE	17	0	7	1	9	
60 - DISABLED INCOME ELIGIBLE	177	0	100	24	43	
BLIND OR VISUALLY IMPAIRED INDICATION FOR TELEPHONIC TIMESHEET APPROVAL USE						
BLIND	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
VISUALLY IMPAIRED	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
TOTAL	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
BVI TIMESHEET						
YES	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
NO	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
BVI CORRESPONDENCE DELIVERY OPTION						
STANDARD CORRESPONDENCE DELIVERY	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
LARGE TEXT DOCUMENTS	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
BVI ASSISTANCE LINE	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
SUPPORTED DOCUMENT READING	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
BRAILLE DOCUMENTS	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
AUDIO CD	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
DATA CD	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
AUTHORIZED REPRESENTATIVE	399,999,994	99,999,999	99,999,999	99,999,999	99,999,999	
INCOME ELIGIBLE						
IHSS-R SOC	31	N/A	N/A	N/A	31	

CONFIDENTIAL
DATA UPDATED AS OF APPROXIMATELY 5:00 PM THE PREVIOUS DAY

Figure 6 – Recipient Summary Characteristics Listing Report

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CMIPS Data Downloads

Description of change: The data download has been modified to capture the data elements added to the Recipient Summary Characteristics Listing report as described above. The new columns listed below will be added to the *RECIPIENT_MANAGEMENT_DATA_DATADWLDREC_PART_4.csv* file

Telephone Timesheet Approval System

Beginning May 1, 2015, IHSS blind recipients will have the option to use TTAS to review, approve, or reject their provider’s timesheet(s) for processing in CMIPS.

During standard IHSS timesheet processing, each timesheet submitted is scanned and analyzed. If the provider’s timesheet was signed by the recipient, the timesheet is processed using standard IHSS processes and is generally released for payment. However, if the system detects a missing recipient signature on a timesheet, the system will determine whether the recipient is enrolled in TTAS. If the blind recipient is

|
enrolled in TTAS, the recipient will receive an automated call to review and electronically verify or reject the provider's timesheet.

If a blind recipient requires assistance while using TTAS, a B&VI assistance line is available to assist them with timesheet review and the verify/reject process. The TTAS assistance line is intended to support recipients if they need assistance reviewing and electronically verifying or rejecting their timesheets. This assistance line can be reached at **1-844-576-5445**.

The recipient will be asked to identify his or her preferred call language. If English or Spanish is selected, the interactive call will continue. If Mandarin or Armenian is selected, the call will be redirected to the assistance line, where a voice message can be left so that a staff member who speaks Mandarin or Armenian can return the recipient's call (See Figure 7).

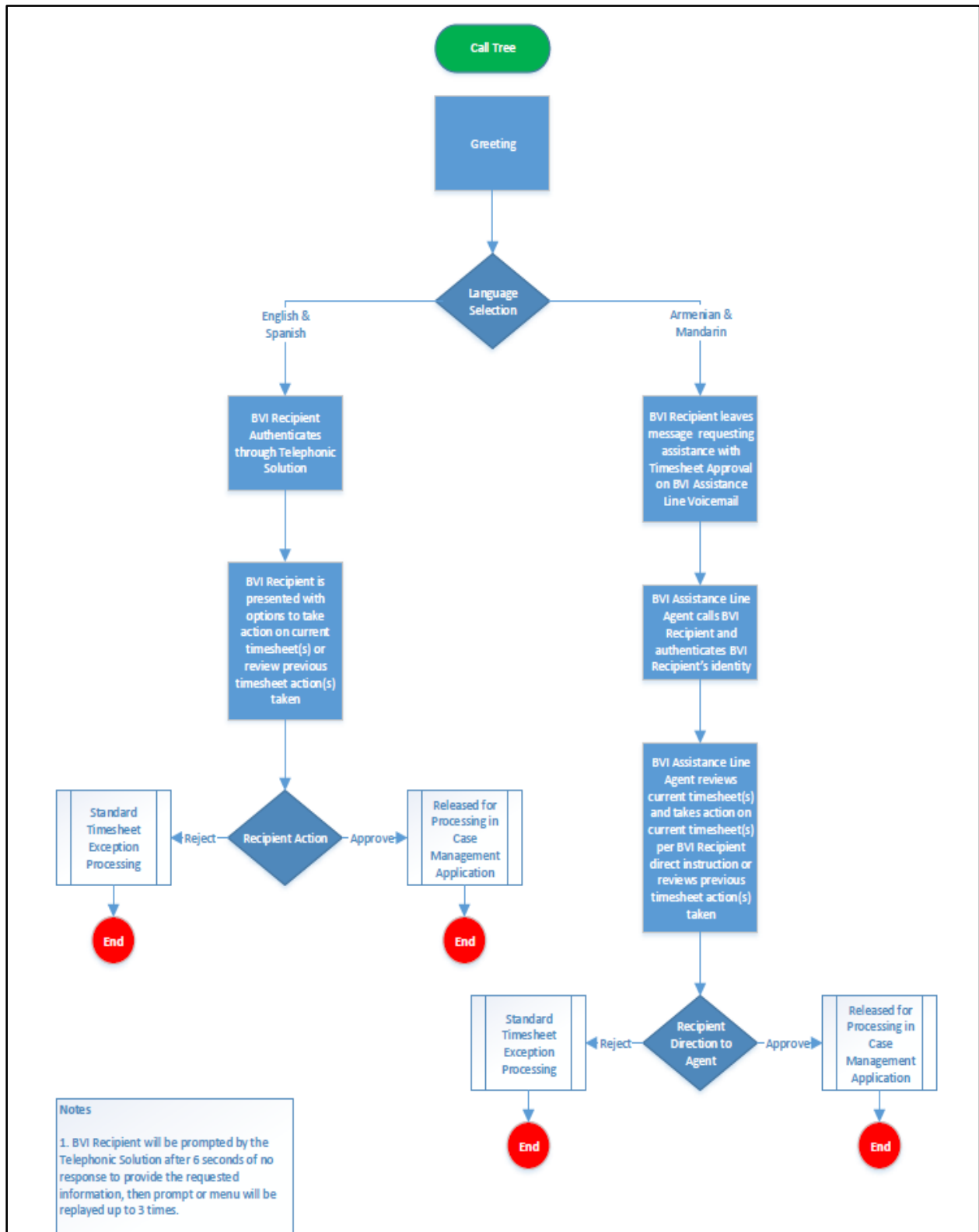


Figure 7: Telephone Timesheet System Call Flow Diagram

Social Worker User View

The CMIPS Timesheet related screen will be changed to capture B&VI Timesheet Release/Reject information by the TTAS assistance line agents. However, the county social workers will have view-only access to the below screens (see Figure 8).

When the “B&VI Timesheet Release/Reject History” link is selected on the *View Timesheet* screen, the *BVI Timesheet Release/Reject History* screen displays. This screen lists the history of released or rejected B&VI timesheet records associated with the case. The default sort displays the most recent creation date at the top of the list.

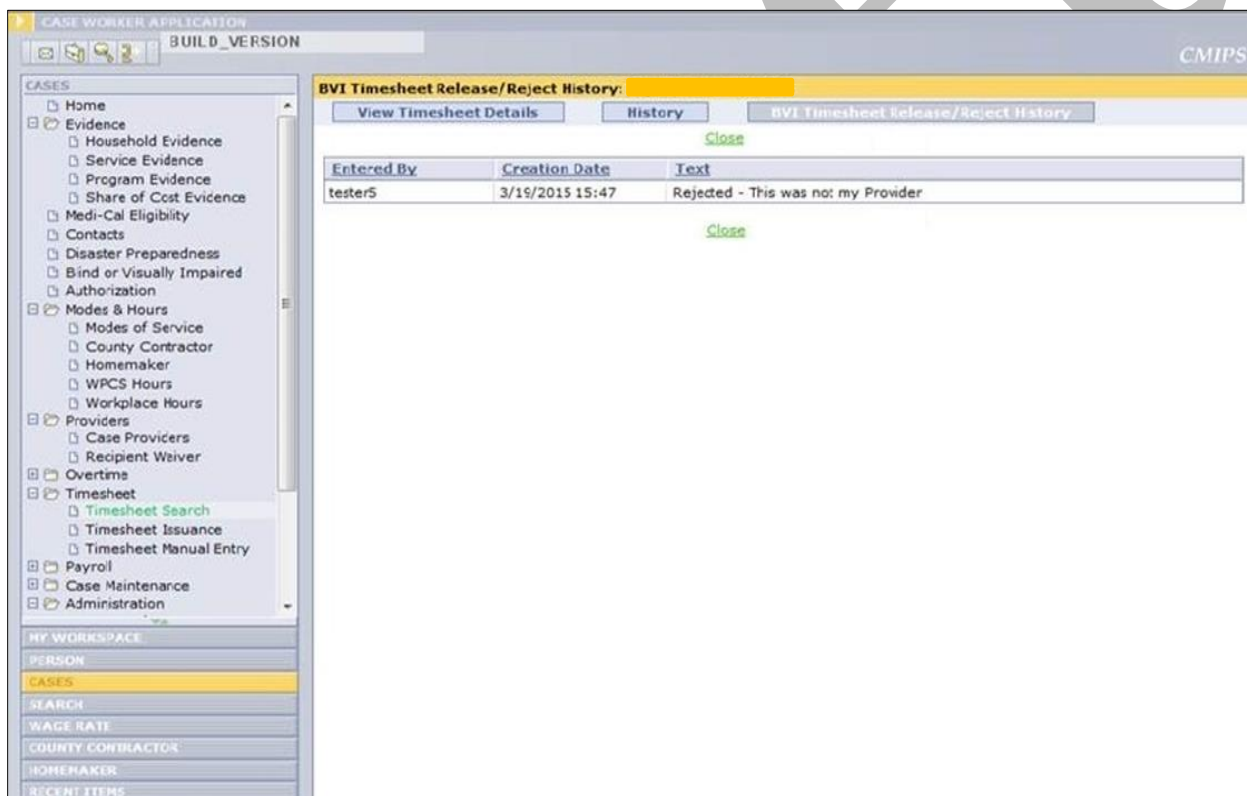


Figure 8: *BVI Timesheet Release/Reject History* screen

Timesheet Statuses

The table below provides new timesheet status information:

Hyperlink	Function
Release BVI Timesheet	This link will only be available for timesheets in the following status: Held – BVI Recipient Review Required <u>Note:</u> This link will only display for a User ID which is part of the correct B&VI Security Group.
Reject BVI Timesheet	Allows the user to terminate processing of a timesheet. When rejected, the timesheet will be set to an Exception status. This link will only be available for timesheets in the following status: Held – BVI Recipient Review Required <u>Note:</u> This link will only display for a User ID which is part of the correct B&VI Security Group.

New CMIPS Tasks

New tasks have been created to assist county social workers to update B&VI recipient's information:

- Task #1 to correct a B&VI recipient's incorrect phone number
- Task #2 to restore a B&VI recipient's RAN (when it is locked by the recipient, the county IHSS worker will receive a task in their Inbox)

These tasks will be generated through daily batch cycle processing:

#	CMIPS Task Name	Screen Action	Task Recipient	Required Action for Closure	Deadline
1	Indication received from Telephonic Solution that the telephone number associated with Case [case number] is incorrect. Confirm telephone number with BVI Recipient.	CMIPS shall trigger a Task to the Case Owner when Case Management receives notice that the telephone number used to reach the BVI Recipient for Timesheet Review is incorrect.	Case Owner	Task Closed by the User Or When Primary Telephone Number of the Recipient is Updated	One Day
2	[case number] Incorrect Recipient Authorization Number entered three (3) times. Contact [recipient name] at [primary recipient telephone number] to establish a new Recipient Authorization Number.	CMIPS shall trigger a Task to the Case Owner when Case Management receives notice that the incorrect Recipient Authentication Number has been incorrectly entered three (3) times via the Telephonic Solution.	Case Owner	Task Closed by the User Or New Recipient Authentication Number is saved.	One Day / Case Owner Supervisor

TRAINING

Additionally, training and materials regarding these additional reasonable accommodations and TTAS will be made available through the IHSS Training Academy beginning November 2015. An audio CD will be provided to county IHSS offices for future training of county social workers.

CAMERA-READY COPIES AND TRANSLATIONS OF FORMS

Counties may access camera-ready versions of the English forms referenced in this ACL on CDSS' Forms/Brochures web page at:
<http://www.dss.cahwnet.gov/cdssweb/PG183.htm>.

Counties may access camera-ready versions of the Spanish, Armenian, and Chinese forms referenced in this ACL on CDSS' Forms/Brochures web page at:
http://www.dss.cahwnet.gov/cdssweb/FormsandPu_274.htm.

Your county forms coordinator should distribute translated forms to each program and location. Each county shall provide bilingual/interpretive services and written translations to non-English or limited English proficient populations as required by the Dymally Alatorre Bilingual Services Act (Government Code section 7290 et seq.) and by state regulation (Manual of Policies and Procedures, Division 21, Civil Rights Non-discrimination, section 115).

If you have any questions about accessing the forms, please contact the Forms Management Unit at FMUdss@dss.ca.gov, or via telephone, at (916) 916-651-5350. Should you have questions regarding this ACL, please contact the Adult Programs Division, Adult Programs Policy & Quality Assurance Branch, Policy and Operations Bureau at (916) 651-5350. If you have questions or comments regarding system changes described in this ACL, please contact the Adult Program Division CMIPS and Systems Operations Unit at (916) 551-1003 or via e-mail at:
CMIPSII-Requests@dss.ca.gov.

Sincerely,

EILEEN CARROLL
Deputy Director
Adult Programs Division

C: CWDA