Update 2015-17: Common Place
Telephonic Signature Redetermination and Recertification Process

Background
The Affordable Care Act (ACA) requires states to accept telephonic signatures. In an effort to promote alignment of programs, the California Department of Social Services (CDSS) encourages the acceptance of a telephonic signature on documents such as the “Application for CalFresh, Cash Aid and/or Medi-Cal” (SAWS 2 Plus).

In June 2015, a pilot of 3 units launched in Santa Clara County for telephonic signatures at annual CalWORKs Redeterminations (RDs) and CalFresh Recertifications (RCs).

Changes
Due to the success of the Telephonic Signature (TS) pilot project, TS RD/RCs are being expanded to all of the Continuing Benefit Services (CBS) units.

• Phone equipment has been updated to provide Calabrio/Finesse software to all CBS eligibility workers (EWs). Finesse is used to record the client’s understanding and consent for a TS.

• A business process for TS annual RD/RCs has been developed and is available in the CalWIN page of the SSA Intranet. [See SSA Intranet/CalWIN/Business Processes]

• Training will be provided for eligibility staff during the months of August and September.

• A recording has been created for EWs to play while the client is on the phone. The recording provides the Rights and Responsibilities for the clients to listen to.

Implementation
The changes listed in this Update are effective September 1, 2015.
**Documentation**

The requirements for documentation of TS RD/RCs are the same as all RD/RCs.

[Refer to CP HB “Case Narration,” page 25-1]

**Forms**

Over the course of the three month pilot, the TS related forms and scripts have been modified. For the most current versions, refer to the DEBS Forms Library.

[http://inetapps/debs/home/Pages/debs.aspx]

**TS RD/RC Informational Mailer**

A flyer is being sent to CalWORKs and CalFresh clients during the month of September. The flyer provides information on the new TS RD/RC process and informs clients that renewal packets will no longer be sent to them.

**SCD 130TS**

The “Eligibility Redetermination Appointment Notice” (SCD 130TS) is used by the EW to schedule a TS RD/RC telephone interview for the following month. The form notifies the client that there will NOT be any additional forms arriving by mail for their completion prior to their scheduled TS appointment. The form also explains the TS process and the verbal agreement by phone.

**SCD 2403**

The “Notification of Completed Yearly Review letter “(SCD 2403) is being sent by Central Support Services (CSS) once the RD/RC has been authorized by the EW. CSS is also printing and mailing the SOF AFTER the case has been authorized by the EW to ensure the data on the SOF is current.

**Other Programs**

These procedures only effect CalWORKs and CalFresh RD/RCs.

**Kudos**

Thank you to CBS Units A6E, A6H and A6P for participating in the pilot version of the TS Annual RD/RC Process. Your input and suggestions will prove helpful for future units.

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