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ACTING DIRECTOR

STATE OF CALIFORNIA—HEALTH AND HUMAN SERVICES AGENCY  
**DEPARTMENT OF SOCIAL SERVICES**  
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GAVIN NEWSOM  
GOVERNOR

January 7, 2019

ALL COUNTY INFORMATION NOTICE (ACIN) NO. I-93-18

TO: ALL COUNTY WELFARE DIRECTORS  
ALL COUNTY FISCAL OFFICERS  
ALL COUNTY AUDITOR CONTROLLERS  
ALL CHIEF PROBATION OFFICERS

SUBJECT: CHANGES IN THE CURRENT COUNTY ASSISTANCE (CA 800)  
CLAIM SUBMISSION PROCESS

REFERENCE: [CFL No. 03/04-38, IMPLEMENTATION OF THE AUTOMATED ASSISTANCE CLAIMS SUBMISSION PROCESS, JANUARY 9, 2004.](#) [CFIN, COUNTY EXPENSE CLAIM REPORTING INFORMATION SYSTEM \(CECRIS\) PROJECT, SEPTEMBER 5, 2013](#)

The purpose of this All County Information Notice (ACIN) is to notify counties of changes to their County Assistance (CA 800) claim submission process and to instruct counties on how they will submit their monthly claims. Currently, the CA 800 claims, comprised of Excel workbooks, are submitted monthly by counties to the California Department of Social Services (CDSS) via email. Effective with the February 2019 claim, due March 20, 2019, counties shall utilize the CECRIS portal to submit their monthly CA 800 claims.

**BACKGROUND**

The CDSS is currently in the process of replacing both the Assistance (CA 800) and Administrative County Expense claims (CEC) with a new claiming system referred to as the County Expense Claim Reporting Information System (CECRIS) that will be fully implemented in August 2021. The first phase/release of CECRIS is the portal web-location that counties will access to submit their CA 800 claims. The portal will provide

a mechanism for county CA 800 users to upload their CA 800 claim and to become familiar with the CECRIS portal while the application is being developed.

The CA 800 claim template and the process of reviewing and approving county CA 800 claims will not change at this time; only the method of submitting the claims will change.

### **USER SELECTION AND ACCESS TO CECRIS PORTAL**

Counties shall identify up to two users for each of their county claiming entities and submit the names to CDSS. Counties will receive an email in early January from [CECRIS INFO email](#) with a request to identify two CECRIS CA 800 portal users. Counties shall submit user names to CDSS by January 31, 2019.

Access to the CECRIS portal for the initial users will be granted by the CDSS Development Team. Users will be invited via email to register in CECRIS. A relationship with Microsoft is a requirement to register in CECRIS. If counties use Microsoft Office 365 that relationship already exists and users will receive a link to the CECRIS Access Page. (Figure 1)

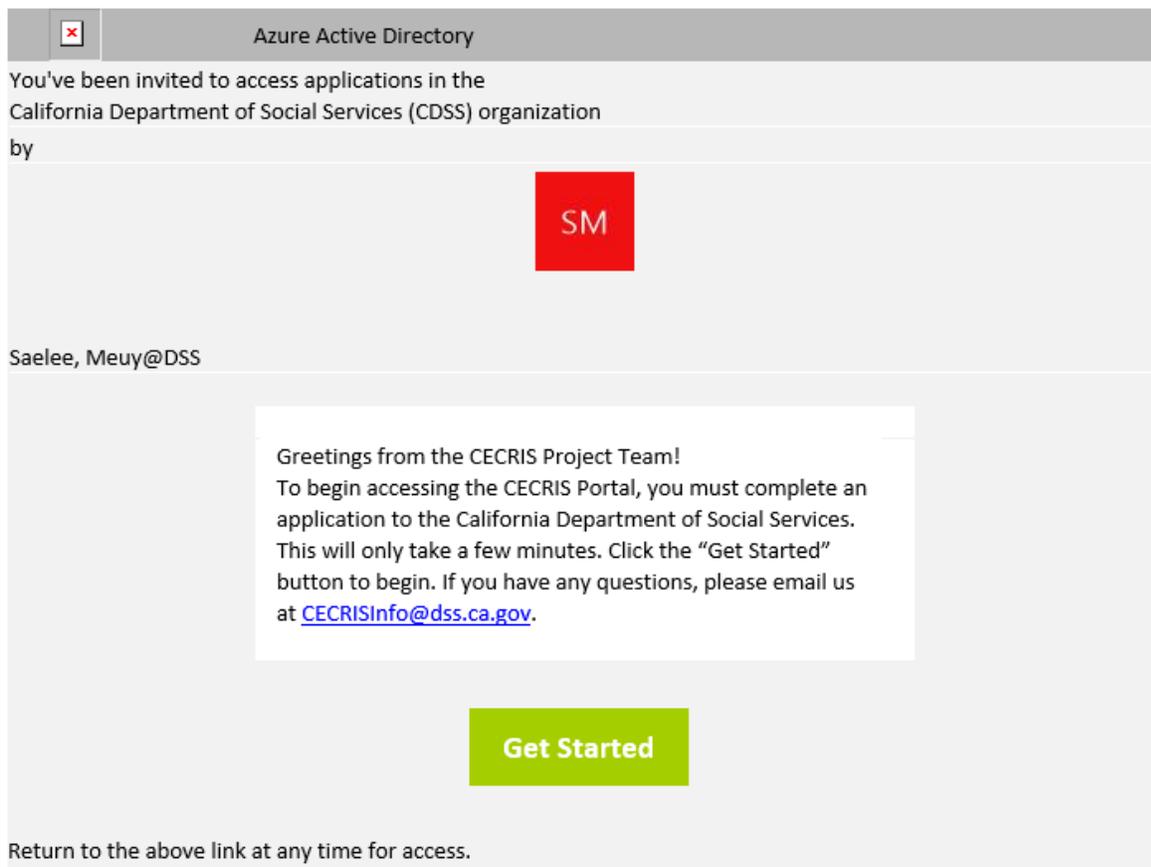


Figure 1 - CECRIS Access Page

If a county does not have an existing relationship with Microsoft, such as with Microsoft Office 365, users will be prompted to establish a Microsoft account. They will need to create this account using their county email address to be able to access CECRIS.

Users will first be given access to a test/training environment of CECRIS during the training period of March 1 through March 14, 2019. After users complete the application registration process, the CECRIS Development Team will assign CECRIS security roles. Once these roles have been assigned in CECRIS, the users will be notified by email that their access to the CECRIS test/training application has been granted.

After users participate in the training, this access will be used to practice downloading claims and related forms and uploading their claim documents. The CECRIS test/training environment will then be deactivated and the users will be given access to the CECRIS CA 800 portal production environment on March 15<sup>th</sup>, 2019. Users will be notified by email when their access has been granted. It is through this production environment that users will submit the claims for the month of February 2019.

### **CECRIS PORTAL CA 800 WEB PAGES**

The CECRIS portal has been developed with four key screens that the county users will use to access the CECRIS portal to submit their CA 800 claims and supporting documents.

- CECRIS portal Login page
- CECRIS portal Landing page
- Assistance Claims Home page
- Assistance Claim Upload page

In addition, there is a CECRIS Reports page that provides a link to a county's payment and other reports.

**CECRIS Portal Login:** Once registered and given CECRIS security roles, users will sign into CECRIS via the CECRIS portal Login page. (Figure 2)



Figure 2 - CECRIS Portal Login page

By clicking the “Sign In” button, users will obtain access to the CECRIS Portal Landing page. This page is also used to reset the user password. The navigation menu at the top of the page includes links to your Profile, a search function, County Letters, CDSS Website, and Support.

**CECRIS Portal Landing Page:** Once users sign in, the following page displays which provides the CECRIS announcements and buttons to select Assistance Claims or Reports. The button for Administrative Claims will be activated at a later date. (Figure 3). The navigation menu at the top of the page includes the ability to “sign out”.

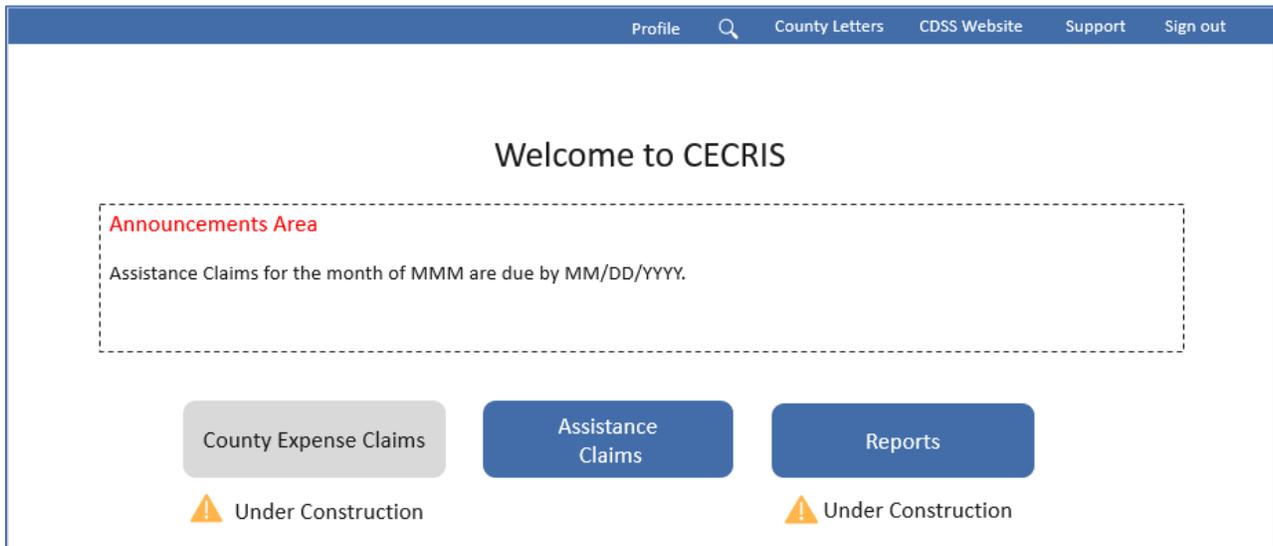


Figure 3 – CECRIS Portal Landing screen

1. Assistance Claims – Clicking this button provides the user access to the Assistance Claims Home page. (Figure 3)
2. Reports – Although the Reports functionality is under construction, clicking this button provides access to the CDSS Administration Assistance Monthly Reports page where users will be able to access payment and other reports. (Figure 6)

**Assistance Claims Home Page:** From this screen, users will have an option to either download claim templates and instructions or upload their county claim documents. (Figure 4)



*Figure 4 – CECRIS Portal Landing screen*

1. Download Claim Files - Clicking the “Download Claim Files and Instructions” button connects the user to the CDSS website where claim forms are located. The claim forms from the CDSS page will be downloaded, stored to a county computer and processed as they are today.
2. Upload Claim Files - To upload a completed CA 800 claim, the county user will access the Assistance Claim Upload page and click the “Upload Claim Files” button. The user will be taken to the “Assistance Claim Upload” Page. (Figure 4)

**Assistance Claim Upload Page:** From this screen, counties shall submit their new claims and supporting certifications pages to CDSS. (Figure 5)

File Name	Document Type	Claim Period	Date Uploaded	Uploaded By
<a href="#">Certification Page 1.docx</a>	Certification Page		11/14/2018 11:06:37 AM	Michelle.Lahmon Contractor@dss.ca.gov
<a href="#">Certification Page 1.docx</a>	Certification Page		11/14/2018 11:06:22 AM	Michelle.Lahmon Contractor@dss.ca.gov
<a href="#">ASST_MMYYYY_CCR_CoNo.xls</a>	Assistance Claim File		11/14/2018 11:07:48 AM	Michelle.Lahmon Contractor@dss.ca.gov
<a href="#">ASST_MMYYYY_EFC_CoNo.xls</a>	Certification Page		11/13/2018 4:17:47 PM	Michelle.Lahmon Contractor@dss.ca.gov
<a href="#">ASST_ECCB_TEMP.xlsx</a>	Assistance Claim File		11/13/2018 4:09:37 PM	Michelle.Lahmon Contractor@dss.ca.gov
<a href="#">ASST_MMYYYY_CABDO_CoNo.xls</a>	Assistance Claim File		11/13/2018 3:41:15 PM	Michelle.Lahmon Contractor@dss.ca.gov
<a href="#">ASST_TribalAssistanceClaim.xls</a>	Assistance Claim File		11/13/2018 3:40:10 PM	Michelle.Lahmon Contractor@dss.ca.gov
<a href="#">Supporting Doc 1.docx</a>	Certification Page		11/13/2018 3:39:28 PM	Michelle.Lahmon Contractor@dss.ca.gov

Figure 5 – Assistance Claim Upload page

1. Assistance Claim Upload – The user will browse the local county computer to locate the applicable claim and supporting documents. User will select the File/Document Type, Month and Year from the drop-down menus and then click the “Upload Claim File” button. Once uploaded, the new file name will display on the top line of the list of Uploaded Files/Documents on this page. This process is repeated for all the documents to be submitted.
2. Access and Print Previously Submitted Documents – Previously submitted documents can be accessed by clicking on the “File Name” in the table. The document will then open for the user to view or print.
3. Export List of Files – A user may also print a complete list of claims previously submitted for a specified defined period of time. This is done by selecting the Beginning Month and Year and Ending Month and Year from the drop-down menus at the bottom of the page and clicking on the “Export” button. An Excel spreadsheet of all documents submitted for the selected period will display and can be saved or printed.

### CECRIS Reports Page

Clicking the “Reports” button from the CECRIS portal Landing page (Figure 3) will display the Reports page. (Figure 6)



Figure 6 – Reports page

Clicking the “Payment Reports” button results in the display of the CDSS Administration/Assistance Monthly Reports page where users can access reports. (Figure 7)



Figure 7 – Administrative/Assistance Monthly Reports page

## **TRAINING TO BE PROVIDED TO COUNTIES**

The CDSS will provide training to users of the CECRIS portal between March 1, 2019 and March 14, 2019. Training will be provided to users via webinar and multiple training sessions will be scheduled to ensure all CECRIS users have an opportunity to attend a session prior to submitting the CA 800 claims. In addition to the web-based training, job aids and other tools will also be made available to county users via the [CECRIS information web site](#). Additional details about training dates and materials will be distributed through the [CECRIS INFO email](#) by February 18, 2019.

**SCHEDULE OF PORTAL READINESS ACTIVITIES**

<b><u>Action</u></b>	<b><u>Who</u></b>	<b><u>When</u></b>
Receive an e-mail request to identify portal users	County Welfare Directors	By January 14, 2019
Submit responses to CECRIS	County Welfare Directors	January 31, 2019
Begin receiving invitations to register as a user in CECRIS	Identified CA 800 CECRIS portal Users	February 1, 2019
County user roles assigned for CECRIS portal	CECRIS Development Team	February 15, 2019
Receive Invitations to User Training Webinars from the <a href="#">CECRIS INFO email</a>	Identified CA 800 CECRIS portal Users	February 18, 2019
Access User Training Webinars - Provided by CECRIS Training Team for registered users	Registered CA 800 CECRIS portal Users	March 1-14, 2019. <i>Multiple sessions offered - only one session required.</i>
Practice in CECRIS portal test environment	Registered CA 800 CECRIS portal Users	After completion of training
Users access CECRIS portal to upload February 2019 Claim	Registered CA 800 CECRIS county portal Users	March 15, 2019

## **SUPPORT FOR USERS**

### **CDSS CECRIS Project Page**

Job aids and other tools to assist with uploading claim files, will be posted to the CDSS CECRIS Project Page at [CECRIS information web site](#). (Figure 8)



*Figure 8 – CDSS CECRIS Project page*

Clicking the “Downloads” link at the bottom of the right navigation panel will result in a display of the CDSS CECRIS Project Training Materials page. (Figure 9)

### **CDSS CECRIS Project Training Materials Page**

User-assistance tools related to the CA 800 portal Upload will be posted to this location prior to the initial training session on March 1, 2019. (Figure 9)



Figure 9 – CECRIS Project Training Materials page

We encourage users to refer to these tools first. If the users' needs have still not been met, they will be able to send an email to [Assistance Claims Support email](#) that will be continually monitored. Requests for assistance will be triaged and resolved by the CECRIS Project Team. More information about this will be shared at the user training sessions.

Questions regarding the content of this ACIN may be directed to [CECRIS INFO email](#). Please enter the ACIN # in the subject line of your email.

Sincerely,

**Original Document Signed By:**

SUE QUICHOCHO  
CECRIS Project Director  
Information Systems Division