

July 20, 2026

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

EXECUTIVE SUMMARY

ALL COUNTY LETTER NO. 26-47

The purpose of this All County Letter (ACL) is to inform counties of a new requirement to maintain In-Home Supportive Services (IHSS) program forms electronically in the Case Management, Information and Payrolling System (CMIPS). This requirement is necessary to promote statewide uniformity and consistency, while optimizing operational time and resources.



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GOVERNOR

July 20, 2026

ALL COUNTY LETTER NO. 26-47

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

SUBJECT: REQUIREMENT TO MAINTAIN IN-HOME SUPPORTIVE
SERVICES (IHSS) PROGRAM FORMS ELECTRONICALLY IN
THE CASE MANAGEMENT, INFORMATION AND PAYROLLING
SYSTEM (CMIPS)

REFERENCE: [ALL COUNTY LETTER \(ACL\) NO. 22-75](#); [ACL NO. 24-40](#);
[ACL NO. 14-86](#);
[ALL COUNTY INFORMATION NOTICE \(ACIN\) NO. I-11-23](#);
[ACIN NO. I-82-17](#)

The purpose of this All County Letter (ACL) is to inform counties of a new requirement to maintain In-Home Supportive Services (IHSS) program forms electronically in the Case Management, Information and Payrolling System (CMIPS). This requirement is necessary to promote statewide uniformity and consistency, while optimizing operational time and resources.

BACKGROUND

Counties are required to utilize State-mandated forms to administer the IHSS program. IHSS providers and recipients are required to sign and submit forms to establish and maintain eligibility. Currently, county and state staff spend considerable time and resources managing paper case files, which includes completing, reviewing, organizing, printing, mailing and storing forms. At county request, CDSS invested in making system modifications to implement electronic forms technology to standardize forms usage and business processes, create efficiencies and reduce county workload related to forms management. The overall goal of the electronic forms' initiative was to identify and require a single version of statewide forms to be used by counties to administer the program and create a forms repository in CMIPS that replaces paper case files.

In preparation for the multi-phase Electronic Forms Initiative, in 2021, CDSS partnered with the County Welfare Directors Association (CWDA) and counties to review IHSS program forms to determine which forms were required for the administration of the program and which county-developed forms could be considered and approved to become a standardized statewide form.

Beginning in 2022, in collaboration with CWDA, counties, and Public Authorities, CDSS implemented document import functionality within CMIPS, which allowed counties the ability to upload and maintain select IHSS program forms electronically. Additionally, to improve counties' ability to communicate with recipients and providers, a secured Message Center was implemented in the Electronic Services Portal (ESP) in March 2023 ([ACIN I-11-23](#)), which allowed counties to send secure electronic messages to IHSS recipients and providers.

In 2023, CDSS and CWDA consulted with San Bernardino, Yuba, San Diego, Fresno and Sacramento counties individually to review their practices and existing applications and assist with preparing for transition to the state electronic forms feature. On December 19, 2023, CDSS hosted an Electronic Forms Implementation Workgroup Meeting, which included CWDA and county representatives from Nevada, San Joaquin, Orange, San Diego, Santa Cruz, Contra Costa and Los Angeles. This meeting provided an overview of the implementation strategy for an electronic form solution, as well as an opportunity for counties to ask questions and provide feedback.

These activities were followed by the implementation of the Electronic Forms (e-forms) Initiative and the CMIPS Services Portal (CSP) in June 2024 ([ACL 24-40](#)), which provided county staff with the ability to generate, send, and receive IHSS forms electronically and collect electronic signatures remotely. Through this initiative, IHSS program forms were made available in an electronic format, eliminating the need for individual county-created forms.

Post-Implementation Activities

After the initial releases, counties requested post-implementation enhancements to align with existing business processes and to support the transition to e-forms and document storage in CMIPS. The following enhancements were implemented by CDSS based on county feedback and request, to streamline and optimize system functionality:

April 2025

- Modified the electronic version of the SOC 295 (Application for IHSS) to allow submission without completion of the Date of Birth field for household members.
- Enhanced system rules to allow the receiving county's information to display on forms created for in-progress inter-county transfers (ICT).
- Made all fields editable on the SOC 864 (Individual Back-up Plan and Risk Assessment) form and allowed zeros (000000000) to be added as a phone number format for information not reported.

- Introduced the ability for county workers to remove e-forms that were created but no longer needed.

May 2025

- Added the ability for counties to upload National Voter Registration Act Voter Registration Forms, Individualized Education Plans, and Individualized Program Plans into document import.

July 2025

- Increased the maximum file size from 5mb to 20mb in document import to allow counties to upload larger files.

November 2025

- Added Auto-Acceptance functionality to e-forms that have been submitted via CSP to allow county workers to avoid a duplication of effort by going back into CMIPS to accept e-forms.
- Enabled automation to print copies of e-forms in a single bundle to be mailed to recipients that are not on ESP. This reduced and simplified county workload by removing the need to print completed forms individually.
- Modified print functionality to allow counties to provide copies of completed e-forms in the recipient or provider's preferred languages.

February 2026

- Expanded the document import functionality to allow counties to upload state hearing decisions and court documents and to allow public authorities access to upload copies of provider identification and Social Security Cards.

April 2026

- Improved the SOC 864 (Individual Back-up Plan and Risk Assessment) e-form to streamline completion and retain appropriate information for subsequent assessments. The purpose of this change was to provide clarity for recipients completing the e-form, as well as reduce duplication for county workers.
- Introduced the Back-up Plan Assessment Case Management screen, providing improved visibility and editing capabilities for the SOC 864 e-form.

June 2026

- Updates have been made to the [Recipient Resources](https://www.cdss.ca.gov/inforesources/cdss-programs/ihss/ihss-recipient-resource) webpage of the CDSS website (<https://www.cdss.ca.gov/inforesources/cdss-programs/ihss/ihss-recipient-resource>) to provide recipients access to ancillary documents that counties currently provide during assessments, including Your Rights Under

California Public Benefits Programs ([PUB 13](#)) and Provider Benefits and Services Information ([PUB 104](#)). Information previously provided in Attachment A, referenced in [ACIN I-82-17](#) are currently available as recipient factsheets.

Forthcoming Change (to be completed by December 2026)

- CDSS will be introducing a one-page document that can be printed from the Forms and Correspondence screen in CMIPS or sent electronically in the ESP Message Center, to provide recipients with a link to the [Recipient Resources](#) webpage of the CDSS website (<https://www.cdss.ca.gov/inforesources/cdss-programs/ihss/ihss-recipient-resource>), which will also include voter registration information.

The CDSS has provided counties with ongoing training, technical assistance, implementation guidance, and individualized support to assist with the transition to electronic case record maintenance within CMIPS. This support included webinars, self-paced training courses, job aids, and one-on-one assistance regarding document import, e-forms functionality, and electronic records management processes, which are available on [CommsHub](#). CDSS has also continuously encouraged counties to utilize electronic methods to maintain program forms within CMIPS in preparation for this requirement.

ELECTRONIC RECORDS REQUIREMENT

To further promote statewide uniformity and consistency, while optimizing operational time and resources, CDSS is implementing a requirement for IHSS program forms to be maintained electronically in CMIPS, as a phased approach. The initial phase, beginning July 1, 2026, requires counties to upload forms into CMIPS when a case is under county quality assurance (QA) monitoring and/or when initiating an ICT. The second phase, beginning January 1, 2027, requires forms to be available in CMIPS when submitting and approving initial evidence for new applicants, at the time of the reassessment for continuing cases (including historical required forms), and at the time of enrollment or hire for IHSS providers.

The benefits of maintaining program forms electronically in CMIPS include, but are not limited to:

- Statewide access to forms for case transfers, quality assurance reviews and program integrity activities
- Reduced mailing time and costs
- Reduced processing timeframes
- Privacy protection
- Security of confidential information
- Improved accuracy of submitted forms through electronic field validations

Required Forms

The forms that must be maintained as part of the recipient's electronic case record include the following, if applicable:

- SOC 295 – Application for IHSS
- SOC 321 – Request for Order and Consent – Paramedical Services
- SOC 332 – Recipient/Employer Responsibility Checklist
- SOC 426A – Recipient Designation of Provider
- SOC 450 – Voluntary Services Certification
- SOC 821 – Assessment of Need for Protective Supervision
- SOC 825 – Protective Supervision 24-Hours a Day Coverage Plan
- SOC 838 – Recipient Request for Assignment of Authorized Hours to Providers
- SOC 839/839A – Designation of Authorized Representative/Timesheet Signatory
- SOC 839B – Cancellation of Authorized Representative/Timesheet Signatory
- SOC 840 – Change of Address/Telephone
- SOC 846 – Provider Enrollment Agreement
- SOC 864 – Individualized Back-up Plan and Risk Assessment
- SOC 873 – Health Care Certification
- SOC 2256 – Recipient and Provider Workweek Agreement
- CR 6181 – Interpreter Services Statement and Confidentiality Agreement

Provider forms that must be maintained in CMIPS include, but are not limited to the following:

- SOC 426 – Provider Enrollment
- SOC 840 – Change of Address/Telephone
- SOC 846 – Provider Enrollment Agreement
- SOC 2255 – Provider Workweek & Travel Time Agreement
- SOC 2305 – Request for Exemption from Workweek Limits (Exemption 2)
- SOC 2308 – Approved Exemption Provider Agreement

If updates or changes are required to any of the forms listed above, the most current version must be completed and maintained electronically in CMIPS. Counties are not permitted to substitute state required forms; however, they may attach supplemental forms or additional information. The CDSS QA will monitor for required forms consistent with IHSS state regulations/statutes.

COUNTY RESPONSIBILITIES

To comply with this requirement, counties must maintain forms in CMIPS by utilizing the following electronic storage options:

- Document Import (upload functionality), or
- Electronic Forms available through CMIPS, the ESP or the CSP.

Counties using e-forms must ensure that all applicable forms are generated, distributed, completed and signed electronically within CMIPS, ESP, or CSP, and that they are maintained as part of the official electronic case record.

Counties using document import to upload and maintain IHSS forms that are received in paper format or outside of the CMIPS e-forms process must ensure all applicable forms are promptly scanned, uploaded into CMIPS, and maintained as part of the official electronic case record.

Counties are responsible for reviewing the quality and completeness of uploaded documents before maintaining them as part of the electronic case record. Documents that are incomplete, illegible, improperly indexed, or missing pages do not meet the requirement and must be corrected when identified.

Counties shall ensure that uploaded documents:

- Are complete and include all required pages and supporting attachments, if applicable
- Are clear and legible
- Include all required signatures and dates
- Are uploaded to the appropriate case record and document type in CMIPS
- Remain accessible for viewing and downloading by authorized users (must not be password-protected)

Quality Assurance Review Documentation Requirements

As a part of the July 1, 2026, requirement, counties must upload forms into CMIPS when a case is under county quality assurance monitoring. The CDSS QA will continue to review cases through random sampling. Prior to January 1, 2027, CDSS QA review will not result in findings for noncompliance if forms are not maintained in CMIPS, which allows counties time to transition and adhere to this requirement.

COPIES AND TRANSLATIONS

Forms referenced in this letter are available on the [CDSS Forms/Brochures webpage](#). When CDSS completes translations of a form, they are posted on the [Translated Forms and Publications webpage](#). When made available by CDSS, forms translated into an individual's preferred language must be provided to the individual pursuant to [Manual of Policies and Procedures \(MPP\) Section 21-115.2](#). For questions on translated materials, please contact Translation Services Section at its@dss.ca.gov. If translations are not available, recipients who have elected to receive materials in languages other than English should be sent the English version of the form or notice along with the [GEN 1365-Notice of Language Services](#) and a local contact number. See [ACL 22-56](#).

Per [MPP Section 21-115](#), the County Welfare Departments (CWDs) must ensure effective bilingual services are provided. This requirement may be met through utilization of paid interpreters, qualified bilingual employees, and qualified employees of other agencies or community resources. These services must be provided, free of charge, to the applicant/recipient. If CDSS does not provide translations of a form, it is the county's responsibility to read and interpret the form if an applicant or recipient requests it. See [ACL 22-56](#).

Additionally, the CWDs must provide auxiliary aids and services such as notices and forms in alternate formats to persons with vision, hearing, or speech disabilities, where applicable. More information regarding provisions for services to applicants and recipients who have limited English proficiency or who have disabilities can be found in [MPP Section 21-115](#) and [ACL 19-45](#).

If you have any questions regarding the information in this letter, contact the CMIPS and Systems Enhancement Branch at CMIPSI-Requests@dss.ca.gov.

Sincerely,

Original Document Signed By

LEORA FILOSENA, P.M.P
Deputy Director
Adult Programs Division

cc: County Welfare Directors Association of California (CWDA)