## Initial assumptions:

* Current Client Information request procedures documented in “ClientInformationRequest\_instructions.docx”,

[\\ehs.govt.state.ma.us\DFS\Access\DMH\APPs\DMHApps\DMH\_IT\AppDev\_Team\ExecutiveDecisionSupport\Client Inquiries](file:///\\ehs.govt.state.ma.us\DFS\Access\DMH\APPs\DMHApps\DMH_IT\AppDev_Team\ExecutiveDecisionSupport\Client%20Inquiries)

* Provide a web-based user interface so that authorized personnel can conduct

client information queries (without submitting requests to App Dev’t Team).

* Queries and nontrivial decision tree procedures to be defined in SQL Server env’t.
* Query results to be presented in intelligible report formats.
* Prerequisites:
  + create a new SQL Server database in dmhDV-apwh-wdb1.
    - what kind of securables configuration do we need?
  + create a new SSRS folder in dmhDV-apwh-wdb1 for presentation of any reports included in the application.
  + create web interface?
    - what kind of user authentication do we need to include for protection of patient identifying information?

## Stage I: Determine requester authentication attributes.

In the interest of access control for an automated application:

* Commissioner’s Office?
* Legal Office?
* Other office?

## Stage II: Query MHIS: current practice

At “Meditech Signon”, enter UID & pw, then press delete to clear HCIS field;

<Fn><f9> for HCIS Lookup; select CM.Live;

Select Enterprise Medical Record/View Persons

At “Enterprise Medical Record” screen, in Menu on the right, select “Any Record”;

At :Any Record” screen, enter Lastname, Firstname, or first part of last name.

SSN, DOB, EMR#, Mother’s Name, Inpt location are also possible search criteria.

Click on “OK <F12>” button.

When the search results screen displays click on the best match.

On the “Visits by Date” list, click any row to get the “Summary List.”

Click the “Demographics” button to get client demographics.

The information given in the demographics page is good for validation of Information provided by INFORM. This was particularly interesting 5 years ago when some erroneous information was discovered in INFORM queries. May be less of a problem now.

Can MHIS data be queried without the MHIS interface?

## Stage III: INFORM

At the Main Menu, under report type, select “Client Data”.

In the Report Name list box, select, “Client Data Summary”.

When the “Area” drop list displays, select “All Areas”.

Click on the “Run Report” button.

When the Client Data Summary Search form opens, enter search criteria in the Client Search fields at the top of the data grid and click on the “Search” button.

Select the best match in the data grid by clicking on the left margin of the row of interest so the row is highlighted. Click on the “Run Report” button.

When the report displays, get a PDF export by right-clicking on the gray area surrounding the report and selecting “Export/PDF or XPS”. A file selection dialog displays where the target folder and file name can be specified.

The pdf can then be attached to an e-mail reply to the requestor.

Can INFORM data be queried via TSQL?

## Stage IV: Query DMH Data Warehouse

Current Resource:

WareHseClientSearch.accdb

[\\ehs.govt.state.ma.us\dfs\access\dmh\APPs\DMHApps\DMH\_IT\AppDev\_Team\ExecutiveDecisionSupport\Client Inquiries](file:///\\ehs.govt.state.ma.us\dfs\access\dmh\APPs\DMHApps\DMH_IT\AppDev_Team\ExecutiveDecisionSupport\Client%20Inquiries)

linked to dmh-bos-wh.ehs.govt.state.ma.us; DATABASE=DMH\_DATA\_WAREHOUSE

1. Check for client exact demographics (each separately)
2. Check for similar demographics (not SSN)
3. Check for clients associated with non-client name or address.
4. When records are generated for 1-3 I look for the following
   1. Service approval data
   2. Enrollment data
   3. CM Enrollment data

**With abundance of specific information, look for more than just name, do a search on SSN, phone numbers, address, guardian/family and note any anomalies you find in the record.**

**Validation cross checking:**

**Did you also check the address to see if it appears in our data? Or if a similarly spelled name is in the same town?**

**Initial investigation?**

**query by client name: QryNameSearch**

**is there a record in dbo\_ClientRestricted with name matching name submitted?**

**query by SSN (when available):** **QrySSN\_Search**

**query by DOB (when available):** **QryDOB\_Search**

**query by eligibility: QrySrvcEligibility**

**is there a record in dbo\_CMEligibility matching ClientID of results from the previous queries?**

**Querying src\_ tables to avoid limitations of filters applied to dbo\_ClientRestricted & QrySrvcEligibility**

**query by client name: QryNameSearch**

**is there a record in dbo\_srcClientRestricted with name matching name submitted?**

**query by SSN (when available):** **QrySSNSearch\_srcClRestr**

**query by DOB (when available):** **QryDOBSearch\_srcClRestr**

**query by eligibility: QrySrvcEligibility**

**where EMRID is included in results from the previous queries and there is a record in dbo\_CMEligibility matching EMRID of results from the previous queries?**

<https://www.msn.com/en-us/feed>

**is there a record in dbo\_srcCMEligibility matching ClientID of results from the previous queries?**

**phone numbers, address, guardian/family** and note any anomalies you find in the record.

**DMH\_DATA\_WAREHOUSE DART Records view: dbo\_DARTReferral**

**query by client name, SSN, DOB (when available):**

**Advanced investigation:**

## Stage V: Query Legacy Tables

Current Resource:

Legacy Systems Data.accdb

\\Dmh-fp-bos-122.ehs.govt.state.ma.us\fs003\Dept \AIT\ExecutiveDecisionSupport\Legacy

**table:** **AllLegacyReference** **703651 rows;**

**table:** **AIMS\_Climaster\_Extr\_Oct2001Final 32500 rows;**

**query by client name:** NameSearchAllLegacy

**query by client name:**

**query by SSN:**

## Stage VI: Query DART/DART Reports

**DART Records**

**query by client name, DOB, SSN (when available):**

**query by eligibility: QrySrvcEligibility**

## Stage VII: Report query results.

Create a job to trigger the production of the report recordset.

Create a subscription for the SSRS report addressed to the current information requester.

## Appx A: Associated Administrative tasks:

## Appendix B: Questions

## Appendix C: Existing resources

INFORM

sp\_EligibilityClientSearch

exec sp\_ss\_CensusINP @Area='%', @Site='%', @AgeGrp='%', @Facility='%'

exec sp\_js\_ApprovedMBHP @Area='CAO', @Site='%'

exec sp\_CaseMgrClientsLivingArrangements @Area='%', @Site='%', @AgeGrp='%'

exec sp\_js\_AllEnrollmentInEligWithAge @Area='%', @Site='%',@StartDate='4/1/2022', @EndDate='4/30/2022'

DMH\_DATA\_WAREHOUSE:

UserDefinedFunction [dbo].[fn\_CheckforMatchingCMSClient]

Searches: SELECT @DMHClientID = Client\_ID from srcClientRestricted where SSN = @SSN

RETURN (@DMHClientID)

Calculations:

SELECT [dbo].[GetAge] ('12/11/1949', '7/28/2022')

## Appendix D: Decision tree chart

[...\OneDrive - Commonwealth of Massachusetts\WIP](file:///C:\Users\AWALKER\OneDrive%20-%20Commonwealth%20of%20Massachusetts\WIP)