# ACTIONS - Transfer Case Logic Map

**Description**: A single use script that will transfer case information, and update MAXIS panels.

**What you need before you start:** Prior to running the script, the case should be processed as far as it can be taken

**Purpose:** Efficiently and accurately transfer cases inner and inter county.

# The script will do the following:

The script will review the case number and ADDR to determine the appropriate transfer actions.

# Functionality(hierarchy)

* 1. Review all information that can be read from MAXIS
  2. Identify which DAILS should be acted on and according to the date which ones will have actionable priority

# Gathering information to what end? (the goal)

1. Who needs to know the case has been transferred in County?
   1. Triage possible – next steps
   2. When sending to an excluded basket – next steps
   3. When changing population – next steps

# User Input/User Dialog

1. User will select to run the script (name to come)
2. Script will try and find the case number
3. Dialog #1
4. Establish Case number
5. Servicing Worker (who are we transferring to)
6. Servicing worker will determine if this is in county or out of county

## In County – Transfer Case and Confirmation that case was transferred

1. The script will only case note out of county or if indicated by worker for in county transfers. QUESTION
2. If a case note is determined to be needed here, we will need procedure
3. If the worker is attempting to transfer the case to X127CCL the script will restrict this action. #466

## Out of County #443

1. Note any unresolved DAIL messages or IEVS matches. – QUESTION: should this be inhibiting?
2. Dialog #2 (for out of county only)

Within county or out of county

Reason for transfer

1. Action taken
2. If METS case is active and METS number
3. Whether the client has entered or left excluded time.
4. List all requested/pending verifications and case actions.
5. Note any expected changes in household's circumstances.
6. List any outstanding work to be taken list the action to be taken by the new worker (such as reevaluate as HH of 1 for SNAP and open on MA-AX, or reevaluate as HH of 2 and open on PX).
7. County of Financial Responsibility - auto fills and only changed if updated by worker
8. Button for the Use form and POLI/TEMP ref
9. If the resident is being transferred outside of Hennepin County #442
10. Per POLI TEMP TE02.08.095 CASE NOTE III: CLAIMS/SYSTEMS/TRANSFERS the following information should be included in the case note when transferring to another county:

# Main Script Functionality

For each MAXIS Case Number, the script will do the following:

1. Navigate to REPT/USER
   1. Servicing worker agency name - identify the new worker or agency on the receiving and will send a SPEC/MEMO to the client informing them of their new worker or agency
   2. EMWriteScreen User First Name
2. Navigate to CASE/CURR to gather status using function determine\_program\_and\_case\_status\_from\_CASE\_CURR
3. Navigate to REPT/USER
   1. EMWriteScreen User Last Name
   2. EMWriteScreen User First Name
4. Navigate to STAT/ADDR
   1. access\_ADDR\_panel - to get address information:

confirmation of county code to ensure that we are really leaving this county – if not script end procedure

* 1. EMReadscreen Note date of client's move – may not have been today
  2. EMReadscreen New address

1. Navigate to CASE/NOTE
   1. For each row in Case note read the following:
      1. Case Note Date
      2. Case Created by (X Number)
2. Navigate to DAIL/DAIL for case
3. Note any unresolved DAIL messages or IEVS matches. – QUESTION: should this be inhibiting? – use the non\_actionable dail function to spit out you have x number of DAILS do you still wish to tranfer
   1. USE DAIL, PICK before to drill down if we only want to filter for select DAIL types
   2. selecting the type of DAIL message "CSES", "COLA", "ELIG", "INFO", "PEPR", "TIKL"
   3. If number\_of\_dails = " " or what if only STAT if this space is blank the rest of the DAIL reading is skipped
   4. Call write\_value\_and\_transmit("T", dail\_row, 3)
   5. dail\_row = 6
   6. if the script does find that there is a new case number (indicated by "CASE NBR"), it will write a "T" in the next row and transmit, bringing that case number to the top of your DAIL
   7. MAXIS\_case\_number = trim(MAXIS\_case\_number)
      1. MAXIS\_case\_number = right("00000000" & MAXIS\_case\_number, 8) 'outputs in 8 digits format
   8. ReadScreen dail\_type, 4, dail\_row, 6
   9. ReadScreen dail\_msg, 61, dail\_row, 20
   10. dail\_msg = trim(dail\_msg)
   11. EMReadScreen dail\_month, 8, dail\_row, 11
       1. dail\_month = trim(dail\_month)

# Enhanced Functionality (possible next steps)

Review what barriers there would be when working a case FILTER for those prior – do we care for XFER

Script will go to each STAT panel separately

Date last updated

Using REPT/USER to find X127 numbers

SANCTIONS

POST 60

Significant Change

Other Specialty

Handling to deal with if case is locked in BGTX

Handling for addressing DISQ

# Exclusions

If the worker is attempting to transfer the case to X127CCL the script will restrict this action.

The script will only case note out of county or if indicated by worker for in county transfers.

Ramsey – 651-266-4444 needs the phone number changed

MNPrairie Bank Support - MNPrairie Bank cases all go to Steele (county code 74)'s ICT transfer.

Agencies in the MNPrairie Bank are Dodge (county code 20), Steele (county code 74), and Waseca (county code 81)

On or after 12/13/21, if you need to transfer a case to Grant or Pope counties (WPHS), use the inter-county transfer ID previously used by Pope County: X161ICT.  Grant County – use the inter-county transfer ID previously used by Pope County: X161ICT Pope County -remains the same. Online edits will be added to SPEC/XFER to prohibit the transfer of cases to X126 ID numbers.  Section TE02.08.195 (WESTERN PRAIRIE HUMAN SERVICES-CASE TRANSFER) has been added to the POLI TEMP manual to provide information about transferring cases to Western Prairie Human Services

IF servicing\_worker = "X120ICT" OR servicing\_worker = "X181ICT" THEN servicing\_worker = "X174ICT"

IF servicing\_worker = "X126ICT" THEN servicing\_worker = " X161ICT "

Question: what will the memo look like for the MNPrairie Bank Support?

Western Prairie Human Services Western Prairie Human Services at 211 East Minnesota Avenue, Glenwood MN 56334 – no phone number has been provided

This will determine the timing of when we establish the REPT/USER

# STAT coordinates

|  |  |  |
| --- | --- | --- |
| **Information** | **Screen** | **Coordinates (varchar, row, col)** |
| worker\_agency\_name | REPT/USER | 43, 8, 27 |
| access\_ADDR\_panel | STAT/ADDR |  |
| determine\_program\_and\_case\_status\_from\_CASE\_CURR | CASE/CURR |  |
|  | CASE/NOTE |  |
| Navigating into spec/xfer | SPEC/XFER | “X” 7, 16 |
| servicing\_worker |  | 18, 61 |
| worker\_check |  | 9, 24, 2 |
| transfer\_confirmation |  | 16, 24, 2 |