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DSD - Section 25



CMIPS

D-4.2-03 – IHSS CMIPS Detailed System Design (DSD) (R2025.03.01) Section 25

Version 1.0

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 - DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (171-180)
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 - DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (241-250)
 - DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (251-260)
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- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (271-280)
 - DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (281-290)
 - DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (291-300)
 - DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (301-310)
 - DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (311-320)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Overtime and Travel Time Violation Triggers
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 - DSD 25/Recip CM & OS – Case Maintenance/Internal Interfaces/Advance Pay SOC Recipient IHSS Hours (PRMS944A)
 - DSD 25/Recip CM & OS – Case Maintenance/Internal Interfaces/Long Paid Claims 35C Interface for Multi-Pay Warrants - ACMS102D
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 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Long Paid Claims (35C) Interface - ACMS102A
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/County Contractor Reconciliation Interface – CCXR3XXA
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/MEDS Daily Receive Interface – CMDR103B
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/SCI Daily Update - CMDR106B
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/SAWS Receive Interface – CMDR4XXA
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/MSSP Interface - CMMR001A
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHO/WPCS Demographics Receive Interface – CMMR101A
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/MEDS Monthly Renewal Receive Interface - CMMR103D
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHO/WPCS Paid Claims Interface – CMMS101B
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHO/WPCS Demographics Send Interface – CMMS101C
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Medi-Cal Quarterly Reconciliation Send Interface – CMQS1XXF
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Meds Alert Receive - CMDR103A
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Centralized Print Solution Interface CMNS997A
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/AADE899A – CMIPS NOA to ISO
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/AADS875A – ISO to SPS
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/AADR875B – SPS ISO Processing Complete
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMDS876A – CMIPS PDF to BVI Format and Manifest
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMDR876B – IHSS PDF to BVI Format Status
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMDR876C – IHSS Required Forms Large Font PDF Receive
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMNS876D – IHSS BVI One-Time Mailing
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHSS Website Account Activity – IWOM885A
 - DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Registered User Email Update AMQP Message (IWOM885B)
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 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Case Appeal Outcome
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Inter-County Transfer Status
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Case Status
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Withdrawal
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Leave
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Case Close Reason
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 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/County Contractor Invoice Status
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 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI NOA Option
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 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Blind or Visually Impaired (BVI)
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI Timesheet Options
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI NOA Template Type
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI NOA Generation Type
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Template ID Code
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Communication Type
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Time Sheet Letter Type
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Calendar Month
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Flexible Hours Frequency
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Flexible Hours Status
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/UHV Status
 - DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/UHV Mandatory Follow-up

- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/E-Timesheet Option
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/E-Timesheet Stopped By
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/IHSS Website Status
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EVV Print Options
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/TTSAccomodations
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EVVEnrollmentStatus
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EVV Exception Status
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Notification Preference
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Text Message Content
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- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Upload Forms Status
- DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EForm Record Status
- DSD 25/Recip CM & OS – Case Maintenance/Database Entities
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Appeal
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Appeal Hearing History
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case WPCS Hours
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Workplace Hours
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Inter-County Transfer
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Homemaker Timesheet
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Homemaker Timesheet Details
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/County Contractor (CC) Invoice
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/CC Invoice Details
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Status Rescind
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Leave
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Unannounced Home Visit
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Medi-cal Eligibility Information
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Medi-Cal Eligibility Information Snapshot
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Medi-Cal Eligibility Segment Information
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Configuration
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/FLSA Configuration Values
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Workweek Agreement
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Workweek Agreement Snapshot
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Overtime Agreement
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch PWA Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Provider Overtime Max Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Active Provider Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Recipient Workweek Agreement Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Case Overtime Maximum Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Active Case Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case BVI
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case BVI Snapshot
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Text Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Text Definition
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Text Message
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Communication
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Braille Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI Attachment
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch FPO Eligibility Trigger
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Communication
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Communication Attachment Link
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Communication Snapshot
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Flexible Hours
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Flexible Hours Snapshot
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Unannounced Home Visit (UHV) Follow-up
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/IHSS Website Person Status
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/IHSS Website Person Status History
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/CMIPSCaseDocument
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Message Center
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/CMIPSCASEDOCUMENTSNAPSHOT
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Eforms Data ID
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Eforms Data Snapshot
 - DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Eforms Data
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/WPCS Hours
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/County Contractor Invoice
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Homemaker Timesheet
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Workplace Hours
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/State Hearing
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Inter-County Transfer
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/IHSS Notification to SAWS
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Case Home
 - DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Case Maintenance – Withdraw, Leave, Reactivate, Rescind, Terminate

DSD 25/Recip CM & OS – Case Maintenance

This section will describe the functional track area pertaining to Case Management – Case Maintenance.

The Case Maintenance topic area of CMIPS will define in detail the system functionality associated with activities concerned with the on-going maintenance of cases.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function

The following business processes are associated with the CMIPS Case Maintenance topic area:

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Reassessment & Renewals

The system functionality associated with processing of IHSS case reassessment was covered in the Service Eligibility (DSD Section 21) and Final Determination (DSD Section 22).

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Waiver Personal Care Services (WPCS) Hours

CI	Document Name
 CI-68756 - DSD BF Waiver Personal Care Services (WPCS) Hours IMPLEMENTED	DSD_BF_Waiver_Personal_Care_Services_(WPCS)_Hours.doc

The WPCS program is a Medi-Cal waiver which allows hours (WPCS) in addition to the IHSS authorized hours.

Prior to 05/01/2022 WPCS services may only be indicated in CMIPS if the IHSS Recipient case is eligible for In-Home Supportive Services Plus Option Program (IPO), Personal Care Services Program (PCSP) or Community First Choice Option (CFCO) funding source, case authorized hours are greater than zero, and Federal Financial Participation (FFP) is Yes.

For dates on or after 05/01/2022 WPCS services may also be indicated in CMIPS when the IHSS Recipient case is presumed eligible for In-Home Supportive Services Plus Option Program (IPO), Personal Care Services Program (PCSP) or Community First Choice Option (CFCO) funding source, case authorized hours are greater than zero, and Federal Financial Participation (FFP) is No.

CMIPS allows users to indicate the number of WPCS hours which have been assigned by Department of Health Care Services (DHCS) In-Home Operations (IHO) staff to be paid. The payroll processes in CMIPS will allow payments against those authorized hours. Authorized WPCS hours will be date bounded and will not be payable when an IHSS Recipient case funding program is IHSS-R or if there is an end date associated with WPCS services.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/County Contractor

CI	Document Name
 CI-68761 - DSD BF County Contractor	IMPLEMENTED

Counties having contracts with agencies to provide services to IHSS Recipients will have the ability to electronically submit invoices from the County Contractor for the payment of services. The processing of these invoices will occur when files are received by CMIPS from the counties.

The invoice processing will result in authorized or rejected records which will be accessible, by the counties, through CMIPS Reports. Authorized hours will be posted to the Recipient case.

When County staff have reviewed the processed invoice and completed the Warrant Number and Warrant Date entered in CMIPS the SOC 432 – Claim for Reimbursement IHSS Program Contract Expenditures form can be printed. The invoice payment information will be passed to the payroll system, after processing is complete, for reporting to Funds Management.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Homemaker

CI	Document Name
 CI-68762 - DSD BF Homemaker	IMPLEMENTED DSD_BF_Homemaker.doc

Counties who employ County Homemakers to provide services for IHSS Recipients will process the homemaker timesheets in CMIPS using the manual timesheet process. When processed and approved the associated hours will be posted to the Recipient case. On a monthly basis the payment information will be passed to the payroll system for reporting to Funds Management.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Workplace Hours

CI	Document Name
 CI-68763 - DSD BF Workplace Hours IMPLEMENTED	DSD_BF_Workplace_Hours.doc

CMIPS will allow users to designate a portion of the authorized hours to be served in the IHSS Recipient's workplace. The assessment is based upon the Recipient's need in their home and a portion of those hours may be attributed to the workplace. The workplace hour's assignment is not tracked to the service type level, or by Provider.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/State Hearings

CI	Document Name
 CI-68755 - DSD BF State Hearings	IMPLEMENTED

When an IHSS applicant/Recipient case has been denied or terminated or otherwise has had a negative action taken, the applicant/Recipient has the right to appeal that outcome. The State Hearing process in CMIPS will allow the tracking of these cases through the process as well as reporting on the outcome.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Inter-County Transfer

CI	Document Name
 CI-68766 - DSD BF Inter County Transfer IMPLEMENTED	DSD_BF_Inter_County_Transfer.doc

When an IHSS Recipient moves from one county to another, the county responsible for the management of the Recipient case must also be changed. The Inter-County Transfer process will describe how CMIPS will allow a user transfer of a Recipient case from one county to another without the interruption of services.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Recipient Case Leave, Terminate, Rescind and Reactivate

CI	Document Name
 CI-69379 - DSD BF Recipient Case Leave Terminate Rescind and Reactivate IMPLEMENTED	DSD_BF_Recipient_Case_Leave_Terminate_Rescind_and_Reactivate.doc

Periodically, IHSS Recipients may be admitted to acute care, otherwise institutionalized, or be absent from the State for a period of time. In these circumstances, CMIPS will allow users to set the Recipient case to a Leave status. When a case is in Leave status, no payments will be made for the leave period. When the Recipient returns home, new evidence can be created reflecting the new service eligibility period allowing the case to be eligible for payment again.

Prior to case authorization, individuals applying for IHSS services may withdraw the application. If the case has been authorized, individuals may request termination of services. In addition, CMIPS will allow users to rescind terminations or denials.

When the Rescind case action is processed, the case returns to the Case Status prior to Termination or Denial. The exception to this is converted cases terminated or denied in Legacy. These converted cases can only be reactivated. Depending upon the Rescind Reason selected, specific NOA messages will be generated. If "State Hearing Filed before Termination effective" is selected as the Rescind Reason, the SH05 NOA will be generated along with all NOAs generated when the case status is changed to Eligible or Presumptive Eligible for the most recent application. If "Recipient rescinds request for termination of services" or "State Hearing Decision" is selected as the Rescind Reason, all NOAs generated when the case status for the most recent application changed to Eligible or Presumptive Eligible will be generated. If "Administrative Error" is selected as the Rescind Reason, the TR18 NOA will be generated.

When the Reactivate case action is processed, all evidence must be entered as a new case.

Future Dated Leave or Terminate Case Actions

When a case action of Leave or Terminate is taken, the Status on the Case Home will only change when the calendar date associated with the action occurs. For example, if the user chooses to Terminate an Eligible Status case and indicates a Termination Date one week in the future, when the Terminate Case screen is saved, the Status will remain Eligible until the Termination Date occurs. If the Date associated with an action is allowed to be a past date, the Status will update when the action screen is saved.

When a case is taken on Leave or Terminated with a future date, an attempt is made to process the Leave or Terminate action again, and the Leave or Terminate date associated with the action is future to the previous Leave or Termination action, the user will receive an error because this type of action is not allowed. However, if an attempt is made to Terminate or place on Leave a case with a date that is after the current date but prior to the previous Termination or Leave date, the system supersedes the previous action and allows the new Leave or Termination action with the new date.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Unannounced Home Visits

CI	Document Name
 CI-116196 - DSD BF Unannounced Home Visits IMPLEMENTED	DSD_BF_Unannounced_Home_Visits.doc

The 2009-2010 budget requires, as appropriate and in targeted cases, home visits to be unannounced. Pursuant to AB 19 Section 12305.7 (A), CMIPS will allow State QA users to designate the Date, Reason and Outcome of the Unannounced Home Visit to the Recipient's home.

In March 2013 a CDSS workgroup expanded the Unannounced Home Visits guidelines as stated in All-County Letter (ACL) NO.: 13-83. Case Management allows for the management of those provisions which allows county staff to record a series of events that may take place for any given Unannounced Home Visit occurrence. This includes the reason and focus of the home visit, date and outcome of the initial home visit as well as the capture of any comments.

As outlined in the ACL, when the outcome of the initial home visit is unsuccessful then the county staff must capture within Case Management the date of a follow-up letter, follow-up phone call and follow-up home visit as well as comments for each.

If the follow-up home visit is also unsuccessful then the county staff must capture within Case Management the date of a final phone call, final home visit and comments.

If the final home visit is unsuccessful the county staff are able to terminate the recipient from IHSS for non-compliance of UHV regulations. In order to terminate the recipient for non-compliance the county must record into Case Management: The initial unannounced home visit with unsuccessful outcome, follow-up letter, follow-up phone call, follow-up home visit with unsuccessful outcome, final phone call, and final home visit with unsuccessful outcome. When the recipient is terminated due to non-compliance UHV a Termination NOA is automatically generated with the corresponding termination reason stating those actions took place and when.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Medi-Cal Share of Cost Point of Service Spend-down Processing

CI	Document Name
 CI-68760 - DSD BF Medi Cal Share of Cost Point of Service Spend down Processing IMPLEMENTED	DSD_BF_Medi_Cal_Share_of_Cost_Point_of_Service_Spend_down_Processing.doc

When an IHSS Recipient with a Medi-Cal SOC has a payment processed against his or her case CMIPS sends a real-time transaction to the Medi-Cal Point of Service (POS) system to determine if the IHSS Recipient has an outstanding Medi-Cal SOC. If one exists, the SOC amount will be subtracted from the payment up to the net available for payment. The amount subtracted from the payment will be indicated in CMIPS as an SOC deduction and both the Recipient and Provider will receive SOC letters indicating the amount owed by the Recipient to the Provider.

See DSD Section 24 – Time and Attendance for all POS spend-down processing.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Case Notes

CI	Document Name
 CI-68754 - DSD BF Case Notes	IMPLEMENTED

The ability for a user to indicate notes has been discussed throughout the topic areas. As a recap, notes may be added at a person level or a case level, and the California Department of Social Services (CDSS) has indicated that person notes should be specific to an individual as they apply for IHSS services, meaning that person notes should only be entered during the "referral" process. Once an individual moves from being a referral to an applicant, notes should be associated with the case notes. In addition, when a person is a Provider, person notes can be used for notes specific to the Provider.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Session Warning Message and Case Note Auto Save

CI	Document Name
CI-68764 - DSD BF Session Warning Message And Case Note Auto Save IMPLEMENTED	DSD_BF_Session_Warning_Message_And_Case_Note_Auto_Save.doc

When a user navigates to a screen, communication between the browser and application server takes place. This usually involves retrieving information from the database to display on the screen. The time of this communication is recorded by the server against the user's session.

The server periodically sweeps the sessions and invalidates any that were not refreshed by user activity within the 'maxInactiveInterval' period (user timeout period) specified in the server, causing the user's session to expire. CMIPS gives the user an opportunity to extend their session for another 'maxInactiveInterval' period. Additionally, if the user is viewing a Create or Modify Case Notes screen, the system will automatically save the currently entered notes.

CMIPS will display a warning message five minutes prior to the session expiring and displays the time that the session is expected to expire. The warning message will have an "EXTEND MY SESSION" button which, when pressed, will extend the user's session. The popup is modal and the user will not be able to interact with the screen unless he/she extends his/her session.

If the user is viewing the Create or Modify Case Notes screen, the above messages will be displayed five minutes prior to session expiration. If after a further four minutes have elapsed and the user has not extended his/her session, the application will automatically save the Case Notes to the database. After the save is complete the user's session will timeout and the login screen will be displayed.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/External Interfaces

CI	Document Name
 CI-116192 - DSD BF External Interfaces IMPLEMENTED	DSD_BF_External_Interfaces.doc

CMIPS uses AutoSys as the batch scheduler. All CMIPS Receive and Send jobs are configured in AutoSys. Based on the AutoSys scheduler, these jobs will start and perform the processing.

CMIPS Case Management external interface batch jobs will retrieve information from the Case Management database. CMIPS Payroll external interface batch jobs will retrieve information from the Payroll database. All the tables and columns mentioned in the External Interface sections throughout the DSD refer to Case Management or Payroll database.

These special characters contained within parentheses (- 'space) are allowed for strings in Case Management batch jobs.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Overtime Calculations and Actions

CI	Document Name
 CI-480732 - DSD BF Overtime Calc Actions IMPLEMENTED	DSD_BF_Overtime_Calc_Actions.doc

With the implementation of the payment of overtime and or travel to Providers CDSS has several criteria to determine whether or not a Provider is eligible to be paid overtime or travel. Whether or not a Provider is eligible to be paid overtime or travel is based upon values in internal control table (FLSA Configuration) fields in CMIPS. As stated, these are internal control table fields so a user will not be able to see the settings. However, CDSS determines how these fields are set and these settings are validated by CDSS prior to the change being applied to the CMIPS production environment.

The primary control of whether or not Providers are eligible to be paid overtime and travel is the FLSA Configuration – FLSA Start Date. When this field is set to the system high date (12/31/9999) overtime and travel will not be paid. When the FLSA Start Date is set to a date other than the system high date (12/31/9999) the system will look at one of the following indications to determine which rules are utilized in the payment of overtime and travel.

1. Pay All Providers Overtime – When the Pay All Providers Overtime is set to "True" then all Providers are eligible for overtime. Any Provider who works in excess of 40 hours in a workweek (Sunday through Saturday) is eligible to be paid for overtime and travel when all other criteria for the payment are met. When this field is set to "False" payments will be processed without the payment of overtime.

Workweeks, Overtime and Travel Explanation

CMIPS has the ability to pay overtime to eligible IHSS or WPCS Providers who work or take Career Pathways training courses in excess of 40 hours in a workweek (Sunday – Saturday) period. The 40 hours are aggregated across all Recipients for which the Provider works, and across all training time claims submitted, associated with both IHSS and WPCS. When a Provider works in excess of 40 hours per workweek, the hours over 40:00 will be paid at an overtime rate which is one and one-half (1½) times the default county rate up to the Recipient Auth to Purchase after Adjusted Hours.

CMIPS may also pay Travel to eligible IHSS or WPCS Providers for the time spent traveling directly from one IHSS or WPCS Recipient to another to provide IHSS or WPCS services. To be eligible to be paid Travel a Provider must have an active Travel record for the Recipient for the period Travel is being claimed. When the total number of Travel Hours claim exceeds seven (7) in a workweek, an "Excess Travel" violation will be triggered. CMIPS will, however, allow the payment of Travel from a Travel Claim up to 14:00 in a workweek for a Recipient across both the IHSS and WPCS Programs.

Documentation associated with Overtime and Travel

1. Providers who work for multiple Recipients must complete and submit, to the county, the SOC 2255 – Provider Workweek & Travel Agreement. If, on any single workday, a Provider travels directly from one Recipient to another the Provider must also complete the Travel Time section of the form. Each time the Provider terminates from or is added to a new Recipient this form must be completed and resubmitted to the county if the Provider works for more than one Recipient.
2. Recipients who have more than one Provider may complete and submit, to the county, the SOC 2256 – Recipient and Provider Workweek Agreement. Each time a Provider is terminated or added to the Recipient case this form must be completed and resubmitted to the county if the Recipient has more than one Provider.
3. Career Pathways training time claims submitted by providers in the IHSS Electronic Services Portal.

Maximums and Violations

The following maximums are utilized when evaluating timesheets for the payment of overtime and travel:

1. Weekly Authorized Hours – IHSS services are authorized on a monthly basis. CMIPS takes the monthly authorized hour and determines a Recipient Weekly Authorized Hours by dividing the number of monthly authorized hours by four (4).
2. Monthly Overtime Maximum – Each case will have a Monthly Overtime Maximum determined as the Monthly Auth to Purchase after Adjusted Hours minus 160:00. The monthly and weekly maximum hours do not include overtime hours paid on a training time claim.
3. Provider Weekly Maximum – Provider's based upon the number of Recipient for whom they Provider services, have a Provider Weekly Maximum determined.
 - a. A Provider who works for one Recipient as either an IHSS or a WPCS Provider is referred to as a one-to-one (1:1) Provider and will have a Provider Weekly Maximum equal to the Recipient IHSS Case Weekly Authorized Hours.
 - b. A Provider who works for multiple IHSS or WPCS Recipients or for one Recipient, but provides both IHSS and WPCS services is referred to as a Multiple (1:Many) Provider and has a 66 hour/week Provider Weekly Maximum.
4. Travel Maximum – The travel limit per week across all IHSS and WPCS Recipients which he/she services is 7:00 hours of Travel per week.
5. Overtime and Travel Violations - With the implementation of payment for overtime and/or travel Providers may be subject to Overtime Violations. The following are the violation types which may be incurred by IHSS and WPCS Providers:
 - a. Weekly Maximum – When a Provider submits a timesheet which causes the number of hours paid in a workweek to exceed the Recipients Weekly Authorized Hours the "Exceeds Weekly Overtime Maximum" violation will be incurred.
 - b. Exceeds Travel Maximum – When a Provider submits a travel claim which causes the number of travel hours, across all his/her Recipients for both IHSS and WPCS, if applicable, to exceed the maximum of 7:00/week the "Exceeds Travel Time Maximum" violation will be incurred.
 - c. When the hours claimed on a training time claim result in the provider exceeding the either the weekly or monthly maximum, this will not incur an overtime violation.
6. Incurred violations will have consequences. Therefore, when the payment of overtime and travel is first implemented a three-month grace period has been established to allow Providers and Recipients to understand the rules for overtime and travel time. During this three month period county staff will work with Providers who incur violations to assist them in understanding how they should adjust the number of hours per week or month worked, to avoid incurring violations in the future.
7. Violation Consequences – Violations are tracked on a rolling calendar year basis. This means if a Provider incurs his/her first violation, but does not incur another violation in the next 12 months the first violation will roll off and the Provider will have no violations. However, if the Provider incurs multiple violation the system will track the date that the violation was incurred and take actions based upon the rolling calendar year look at the Provider's violation history. The following list the consequences of either overtime or travel violations:

8. First Violation – When a Provider incurs an overtime or travel violation a warning letter is issued to both the Provider and Recipient explaining the violation and warning that a second violation carries consequences.
9. Second Violation – When a Provider incurs a second violation, the Provider will have the option to review training materials and return the self-certification form to the county. If the Provider reviews the materials and returns the self-certification form within the allocated, 14 calendar days, the second violation will be removed (set to Inactive). If however, the Provider does return the self-certification form to the county, the second violation will be retained. This optional training option is only available to the Provider once.
10. Third Violation – When a Provider incurs his/her third overtime violation this will result in the Provider being terminated from being an IHSS and/or WPCS Provider for a 90 day period. After this 90 day period the Provider may be reinstated.
11. Fourth Violation – When a Provider has been re-instated after their third violation, if another violation is incurred (Fourth Violation) the Provider will be terminated from being an IHSS or WPCS Provider for a 365 day period. After this 365 day period, the provider must again complete the Provider enrollment process.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Blind or Visually Impaired

CI	Document Name
 CI-497868 - DSD BF Blind or Visually Impaired IMPLEMENTED	DSD_BF_Blind_or_Visually_Impaired.docx

IHSS Recipients who are blind or visually impaired (BVI) have the option to select ADA-compliant correspondence delivery formats. A Recipient that is indicated as 'Blind' that is registered with TTS can use the TTS to approve a paper timesheet submitted by their Provider without a Recipient signature.

Screens in Case Management capture and manage the BVI Recipient's correspondence delivery format, which are recorded from either an application for IHSS Services or the BVI Recipient's reassessment. BVI Recipient preference selections will be available both in data downloads and in CMIPS reporting. In addition, if a BVI Recipient requires assistance while using the TTS, a TTS Assistance Line is available to assist BVI Recipients with timesheet review and action.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/CD NOA Generation and Delivery

CI	Document Name
 CI-497793 - DSD BF CD NOA Generation and Delivery CANCELLED	DSD_BF_CD_NOA_Generation_and_Delivery.docx

Cancelled by CR26.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Braille NOA Generation and Delivery

CI	Document Name
 CI-500947 - DSD BF Braille NOA Generation and Delivery IMPLEMENTED	DSD_BF_Braille_NOA_Generation_and_Delivery.docx

During nightly batch processing, when a Notice of Action is generated in Case Management for a Recipient with a written language of English who is indicated as Blind with a Notice of Action Option selection of "Braille Documents", will have the standard Notice of Action generated in nightly batch or immediately to a CMIPS printer and an additional PDF will be generated for transcription into braille by a conversion services Provider. If the Recipient's written language is other than English and the individual is indicated as Blind with a Notice of Action Option of "Braille Documents" the braille document will be generated in U.S. English. The standard Notice of Action will be generated in nightly batch or immediately to a CMIPS printer in English or one of the (3) threshold languages as appropriate to the Recipient's written language designation and an additional PDF in English will be generated for transcription to braille by a conversion services Provider.

The Braille NOA Service Provider will use the English PDF NOA file(s) to create, package and mail a braille version of the NOA directly from Florida to IHSS Recipients in California via the United States Postal Service (USPS). Braille NOAs will be delivered to the USPS for mailing within three (3) business days after receipt of each NOA source PDF document. The PDF NOA files and an accompanying listing (manifest) file will be delivered to the Braille NOA Service Provider for processing by electronic interface file transfer. File transfer will occur every CMIPS business day (excludes weekends and CMIPS observed holidays) in the nightly batch processing cycle. As part of the batch processing to create the PDF NOAs and the listing for delivery by the CMIPS Interface Component, the braille NOA Status will be updated from "Pending Generation" to "Generated".

The Braille NOA Service Provider will provide a reconciling interface to CMIPS, each business day that will provide the received or mailed status of a NOA and the status date. This reconciling file will be provided by electronic interface file transfer. When this file is processed into case management and the NOA status is mailed, the NOA Status for the braille NOA will be updated from "Generated" to "Mailed" and Mail Date information will be populated.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Recipient Flexible Hours

CI	Document Name
 CI-675567 - DSD BF Recipient Flexible Hours IMPLEMENTED	DSD_BF_Recipient_Flexible_Hours.docx

With the implementation of overtime CDSS had indicated that a recipient has the ability to flex their hours on a week-to-week basis when needed. In CMIPS this request will be identified as "Recipient Flexible Hours". The request will be for addition overtime hours in service month, but it does not affect the case authorized hours for the service month.

Recipient Flexible Hours may be requested when a recipient has a need which they know will cause a provider to exceed the recipients Maximum Weekly Authorized Hours of which both the recipients and providers were notified in SOC 2271 and SOC 2271A.

Remember, if the Maximum Weekly Authorized Hours are less than 40 hours per week the recipient will not need to contact the county unless the need causes the hours worked in a workweek to exceed 40 hours.

When a recipient, who's Maximum Weekly Authorized Hours exceeds 40 hours per week determines the hours needed in a workweek may exceed this maximum, they should contact the county to discuss the relevant issue and the county will either approve or deny the request per the instructions provided by CDSS.

Flexible Hours segments may be created for either IHSS or WPCS, if the case has WPCS hours. The maximum number of flexible hours which may be approved for any record is 20 hours per month.

There are two types of "Frequency" associate with Flexible Hours:

- One-time – This would be an instance where the recipient needs additional hours to be worked for one specific event. This request would be for a specific service month. When this type of request is approved the recipient and all of their Active or On-Leave providers will receive an Approval letter (SOC 2266 and SOC 2266A). When a request is denied the recipient and provider(s) will receive a Denial letter (SOC 2267 and SOC 2267A).
- On-Going – This would a repeated event that occurs on a recurring basis for instances once a month. This request would be created and the alternate schedule would apply to multiple service months for this recurring event and the recipient and provider(s) will receive an Approval Letter (SOC 2268 and SOC 2268A). If the request is denied the recipient and provider(s) will receive a Denial letter (SOC 2267 and SOC 2267A). An on-going Recipient Flexible Hours segment would be end dated by a user or when a case is terminated. When the segment is end dated by county or WPCS user a cancellation letter will be sent to the recipient and provider(s). When the recipient case is terminated the Flexible Hours segment will also be end dated, but no letters will be issued for this cancellation.

Flexible Hours Requests:

Flexible Hours are requested for a monthly basis. If the recipient knows they have a specific need in a single calendar month, then the request would be a "One-Time" need for a specific number of hours. The approval of this request would mean these hours would be hours in addition to the recipients monthly overtime maximum for that one month.

If the recipient has a needed which is repeatable each month, this would be an "On-Going" need which means the approved hours would be addition to the recipients monthly overtime maximum for the approved month forward.

The recipient's Monthly Overtime Maximum is found on the Case Authorization Summary screen, but the additional approved Flexible Hours will not be literally added to these hours, but they would be in addition to the Monthly Overtime Maximum hours. The user would need to view both the Case Authorization Summary screen as well at the Flexible Hours screen to determine the "Maximum" Monthly Overtime Maximum hours.

The recipient and providers are notified of the recipient Weekly Hours in the SOC 2271 (Provider) and 2271A (Recipient). The forms indicated above will notified the recipient and provider will be notified of the additional Flexible Hours.

Flexible Hours may be requested for a period three months prior to the current calendar month. This means if a recipient contact the county in April, the request may only be back-dated up the three months, which would means the requested MONTH could be back-dated to January.

Flexible Hours End Dates:

Flexible Hours are assigned End Dates in different ways. If the request was a One-Time request, when the request is approved it will automatically end dated as of the last day of the service month being requested. Because Flexible Hours are related to a specific calendar or service month the Flexible Hours End Date must always be the last day of a calendar month.

Whenever an End Date is indicated the system will issue a cancellation letter to the recipient and all provider associated with the case who have an "Active" or "On-Leave" provider hours or WPCS hours segment depending upon the Flexible Hours program type indicated.

An On-going Flexible Hours segment will be end dated by a user by manually entering an End Date on the Modify Flexible Hours screen. This action will generate a cancellation letter to the recipient and his/her providers.

On-Going flexible hour's segments will also be end-dated when a recipient case is terminated. In this case a Flexible Hours cancellation letter will not be generated.

Otherwise, Flexible Hours segments are not end-dated when a case is put on Leave or a case assessment is authorized regardless of whether or not the case hours change. It is the responsibility of the recipient to contact the county if their need for flexible hour's changes.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/IHSS Notice of Action and Required Forms – BVI Format Generation and Delivery

CI	Document Name
CI-706204 - DSD BF IHSS Required Forms BVI Format Generation and Delivery IMPLEMENTED	DSD_BF_IHSS_NOA_and_Required_Forms_BVI_Format_Generation_and_Delivery.docx

Recipients with a IHSS Required Forms Options of Large Font, Audio CD, Data CD, or Braille or a Notice of Action Option of Audio CD, Data CD, or Braille will have the standard form mailed to them and will receive that document in the indicated BVI format soon after.

Available languages for each BVI format are illustrated in the table below and will be produced in that language based upon the Recipient Written Language selection within CMIPS.

For those recipients that indicate a Notice of Action or IHSS Required Forms BVI Option of Braille, English Braille documents will be produced regardless of the Written Language of the recipient.

IHSS Required forms Option	Large Font	Written Language Indication				
		English	Spanish	Chinese	Armenian	All Other Languages (Source PDF is in English)
IHSS Required forms Option	Braille (English only)	English	English	English	English	English
	Audio CD - MP3 (includes PDF on CD)	English	Spanish	N/A	N/A	English
	Data CD – PDF	English	Spanish	Chinese	Armenian	English
	Large Font	English	Spanish	Chinese	Armenian	English
Notice of Action Option	Braille (English only)	English	English	English	English	English
	Audio CD - MP3 (includes PDF on CD)	English	Spanish	N/A	N/A	English
	Data CD – PDF	English	Spanish	Chinese	Armenian	English
	Large Font	English	Spanish	Chinese	Armenian	English

Table – BVI Format – Language Matrix

Notice of Actions available in a BVI format are:

- NA 1250 – IHSS Approval
- NA 1251 – IHSS Approval Continuation
- NA 1252 – IHSS Denial
- NA 1253 – IHSS Change
- NA 1254 – IHSS Change Continuation
- NA 1255 – IHSS Termination
- NA 1256 – IHSS Share of Cost
- NA 1257 – IHSS Multipurpose
- NA Back IHSS Required Form – No Substitutes Permitted - As the back page on forms NA 1250, 1252, 1253, 1255, 1256, and 1257
- NA Continuation Page Back - On forms NA 1251 and 1254

Notifications available in a BVI format are:

- SOC 2257A – IHSS Program Notice to Recipient of Provider's First/Second Overtime Violation
- SOC 2258A – IHSS Program Notice to Recipient of Provider's Third Overtime Violation
- SOC 2259A – IHSS Program Notice to Recipient of Provider's Fourth Violation and Termination
- SOC 2264 – IHSS Program Notice to Recipient Rescinding Provider Violation
- SOC 2266 – IHSS Program Notice to Recipient Approval of Exception to Exceed Weekly Hours
- SOC 2267 – IHSS Program Notice to Recipient Denial of Exception to Exceed Weekly Hours
- SOC 2268 – IHSS Program Notice to Recipient Approval for Provider to Work Alternate Schedule Due to Recurring Event
- SOC 2269 – IHSS Program Notice to Recipient Cancellation of Alternate Schedule due to Recurring event
- SOC 2271A – In-Home Supportive Services Program Notice to Recipient of Maximum Weekly Hours
- SOC 2281 – In-Home Supportive Services Program Notice to Recipient Upholding Provider's First or Second Violation for Exceeding Workweek and/or Travel Time Limits
- SOC 2283 – In-Home Supportive Services Program Notice to Recipient Upholding Provider's Third Violation (90-Day Suspension of Eligibility) for Exceeding Workweek and/or Travel Time Limits
- SOC 2285 – In-Home Supportive Services Program Notice to Recipient Upholding Provider's Fourth Violation (One-Year Period of Ineligibility)

- SOC 2287 – In-Home Supportive Services Program State Administrative Review Request Response Letter to Recipient Upholding Provider's Third Violation (90-Day Suspension of Eligibility) for Exceeding Workweek and/or Travel Time Limits
- SOC 2289 – In-Home Supportive Services Program State Administrative Review Request Response Letter to Recipient Rescinding Provider's Third or Fourth Violation for Exceeding Workweek and/or Travel Time Limits
- SOC 2291 – In-Home Supportive Services Program State Administrative Review Request Response Letter to Recipient Upholding Fourth Violation (One-Year Period of Ineligibility)
- DHCS 2257A – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient of Provider's First/Second Violation for Exceeding Workweek and/or Travel Time Limits
- DHCS 2258A – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient of Provider's Third Violation (90-Day Suspension of Eligibility) for Exceeding Workweek and/or Travel Time Limits
- DHCS 2259A – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient of Provider's Fourth Violation (One-Year Period of Ineligibility) for Exceeding Workweek and/or Travel Time Limits
- DHCS 2264 – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient Rescinding Provider Violation
- DHCS 2281 – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient Upholding First/Second Violation for Exceeding Workweek and/or Travel Time Limits
- DHCS 2283 – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient Upholding Third Violation and 90 Day Suspension of Eligibility
- DHCS 2285 – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient Upholding Provider's Fourth Violation and One Year Period of Ineligibility
- DHCS 2287 – State Administrative Review Request Response to Recipient Letter Upholding Provider's Third Violation and 90 Day Period of Ineligibility
- DHCS 2289 – State Administrative Review Request Response to Recipient Letter Rescinding Third or Fourth Violation
- DHCS 2291 – State Administrative Review Request Response to Recipient Letter Upholding Provider's Fourth Violation and One-Year Period of Ineligibility
- SOC 2301 – In-Home Supportive Services (IHSS) or Waiver Personal Care Services (WPCS) Recipient Confirmation of Enrollment in Electronic Timesheet Service or Telephone Timesheet System

When these documents have been produced in nightly batch processing, standard PDF versions of these documents are routed to the county for printing. In addition, for those recipients that have a BVI format indicated, a version of the PDF document is also routed to the third-party provider Braille Works's SFT Server to produce, package, and mail in the indicated BVI format. To transcribe the documents the PDFs routed to Braille Works are unlocked and contain embedded fonts.

The nightly batch process places a copy of each PDF into a directory on the SFT server to which Braille Works has access. A manifest file is also produced and placed in this directory which contains, for each document, the BVI format indicated by the recipient, language of the document, as well as the recipient name and address needed for delivery of the BVI document. File transfer occurs every CMIPS business day, excluding weekends and CMIPS-observed holidays. Also, as part of nightly batch processing, the CMIPS forms Status for the documents transferred to Braille Works are updated from "Pending Generation" to "Generated."

In the morning, after batch has completed, Braille Works sweeps the SFT folder and transcribes all PDF documents found in the directory into the indicated BVI format. Within three (3) business days after receipt, Braille Works packages and mails the transcribed documents directly from Florida to IHSS Recipients in California via the United States Postal Service (USPS).

Each business day, Braille Works provides a reconciling interface to CMIPS that indicates the received or mailed status of a document along with the status date. This reconciling file is provided by electronic interface file transfer. When this file is processed into case management, the document Status for the BVI document is updated from "Generated" to "Mailed" and Mail Date information is populated.

Each BVI format transformation requires slightly different processing as described below:

- **Large Font Documents**

For those recipients that have the IHSS Required Forms Option of "Large Font Documents" indicated, Braille Works not only produces and mails the large font BVI version of the documents, but also transfers the large font versions created to CMIPS. CMIPS ingests those documents and replaces the standard font version in the corresponding recipient "Forms and Correspondence" screen. At that point, the county workers can view and reprint the large font version of these documents. The large font versions of these documents are produced in 18 pt. font in one of the four (4) threshold languages (English, Spanish, Chinese, or Armenian).

For those recipients that have the Notice of Action Option of "Large Font Documents" indicated, documents are printed at county printers in one of the four threshold languages (English, Spanish, Chinese, or Armenian).

- **Audio CD and Data CD**

For Audio conversion of IHSS NOAs and Required Forms, Braille Works transcribes the English or Spanish PDF documents to MP3 audio in the corresponding language. For proper navigation within text-to-audio readers, such as JAWS, Braille Works formats the PDF document by ordering the fields and text blocks in a top-down manner. The reader-ready versions of the PDF documents are supported in English, Spanish, Chinese, and Armenian.

For those recipients that have the Notice of Action or IHSS Required Forms Option of either Audio CD or Data CD indicated and a Written Language of English or Spanish, the CD produced by Braille Works contains both the audio MP3 and the reader-ready PDF of the violation document – regardless of which option has been indicated.

- **Braille Documents**

Braille documents are only generated in US English from English PDF documents. For those recipients that have the IHSS Required Forms Option of "Braille Documents" and have a Written Language indicated as Spanish, Chinese, or Armenian, an additional standard PDF document is also generated in nightly batch. Regardless of the written language of the recipient, the additional PDF used for Braille transcription will be unlocked and only contains embedded English characters.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/County Direct Mailing

CI	Document Name
 CI-718078 - DSD BF County Direct Mailing IMPLEMENTED	DSD_BF_County_Direct_Mailing.docx

Pursuant to AB 19 Section 12305.7 (h), CDSS, in consultation with the county welfare departments and other stakeholders, as appropriate, developed protocols for the implementation of directed mailings to recipients and providers to convey program integrity concerns.

In March 2013 the State of Californian concluded a two year workgroup which addressed and clarified the protocols for targeted mailings guidelines as stated in All-County Letter (ACL) NO.: 13-83. Counties are instructed to perform a direct mailing outside the CMIPS system at least once a year.

After the county performs the mailing they provide a file to CDSS containing the following:

- County Name
- Case Number
- Provider Number
- Reason for mailing
- Date of mailing

CDSS may concatenate files from several counties together and place a single CSV file in a folder on the SFT server.

On or about September 1st of each year CGI runs a batch program which processes the CSV file into Case Management that will display, for each Recipient Case on the View Targeted Mailing screen within the Quality Assurance/Targeted Mailing folder.
This batch process may also be run on an ad hoc basis.

From each run of the batch process above a response CSV file is placed back on the SFT server contain records that have contained errors. The response file is in the same format as the receive CSV file. When no errors are encountered an empty response file will be placed on the SFT server.

The possible reasons for record failure are:

- Invalid Recipient Number (format)
- Recipient Number is not found in Case Management
- Invalid Provider Number (format)
- Provider Number is not found in Case Management
- Provider is not assigned to Recipient Case
- Mailing date is invalid format

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/IHSS ESP Registration Inactivation

CI	Document Name
 CI-795491 - DSD BF IHSS ESP Registration Inactivation 	DSD BF IHSS ESP Registration Inactivation

IHSS ESP Account Inactivation

County staff has the ability, within Case Management, to deactivate an IHSS ESP account for an individual IHSS/WPCS recipient case.

When the IHSS ESP registration for a recipient has been deactivated, the existing User Name associated to that case number is prevented from logging into the ESP, and another account cannot be established for that case number. The User Name associated to the deactivated account will also be locked, and cannot be used by another user.

The county may also deactivate ESP registration for a recipient even when an ESP account has not previously been established for their case number. Deactivating ESP registration in advance will prevent anyone from creating an ESP account under the recipient's case number.

Once deactivated, a letter (SOC 2321) informing the recipient their ESP account has been deactivated will be spooled to the county printer to be mailed or given to the recipient or authorized representative. Once generated, SOC 2321 will be available as a printable PDF in the Forms/ Correspondence screen for that case.

IHSS ESP Account Reactivation

The case owner may reactivate IHSS ESP registration that was previously deactivated. However, once the ESP registration is reactivated, to use the ESP, the recipient is required to register again and may, if they choose, use the same User Name from the deactivated account.

Account Inactivation and EVV Timesheets

When the IHSS ESP account is deactivated, for a Recipient that is not yet subject to EVV timesheet requirements any Provider(s) that they were using electronic timesheets with will begin to receive paper timesheets.

When an IHSS ESP account is deactivated, for a Recipient that is subject to EVV timesheet requirements the user will receive an error message if the Recipient is not yet registered for TTS since electronic review is necessary for EVV timesheets. The county user can register the Recipient for TTS and then take the ESP deactivation action. If a Recipient is registered for TTS the ESP account can be deactivated without error.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/EVV Deferral and Undeferral

CI
 CI-822280 - DSD BF EVV Deferral and Undeferral CANCELLED

Cancelled by CR115.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Function/Document Import

Please refer to Document Import Business Process located in DSD 23 - Provider Management.

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow/Inter-County Transfer Process Flow

CI	Document Name
CI-67652 - DSD BP InterCounty Transfer Process Flow IMPLEMENTED	DSD_BP_InterCounty_Transfer_Process_Flow.doc

Case Management – Inter-County Transfer (ICT)

Business Process

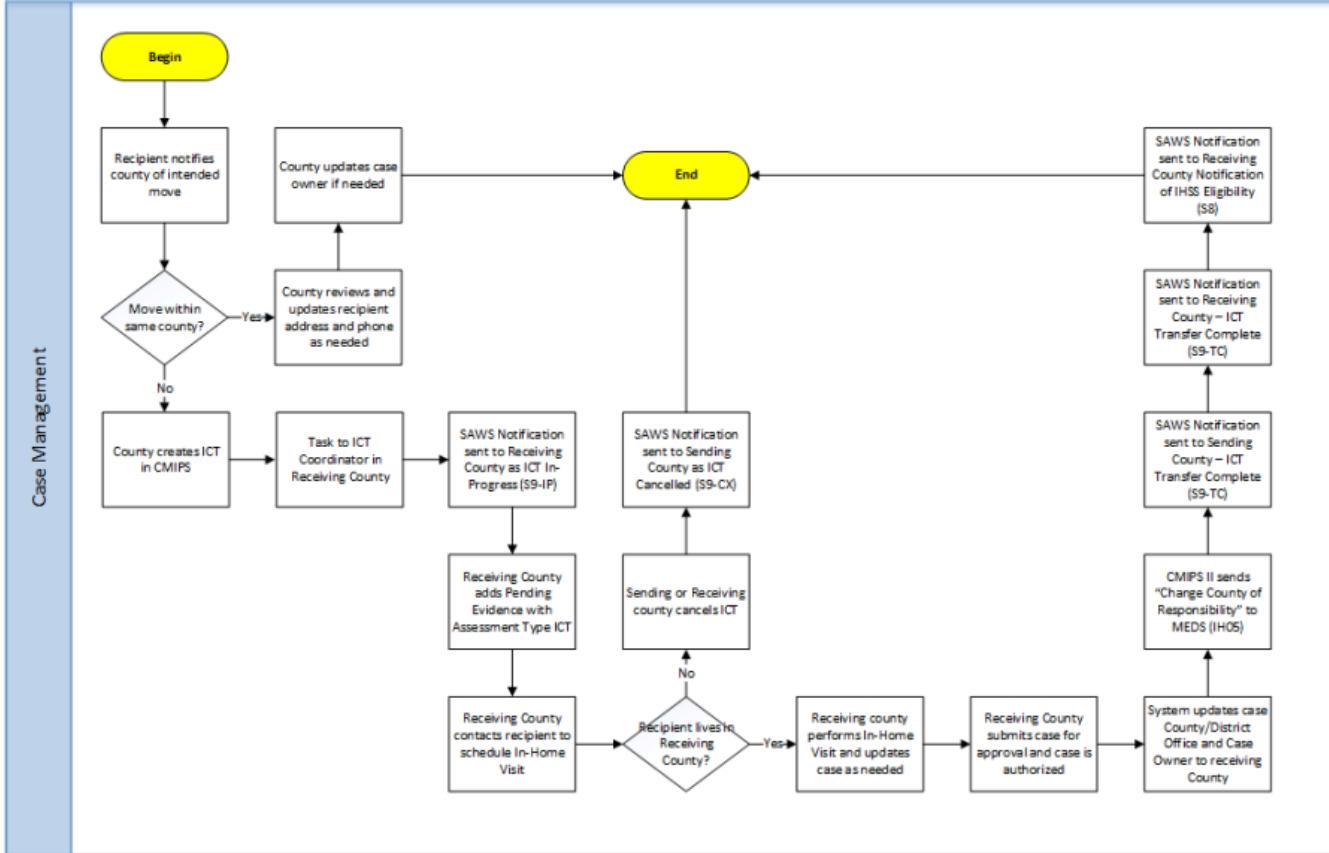


Figure – Inter-County Transfer

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow/BVI Assistance Line Timesheet Review – Inbound – English or Spanish

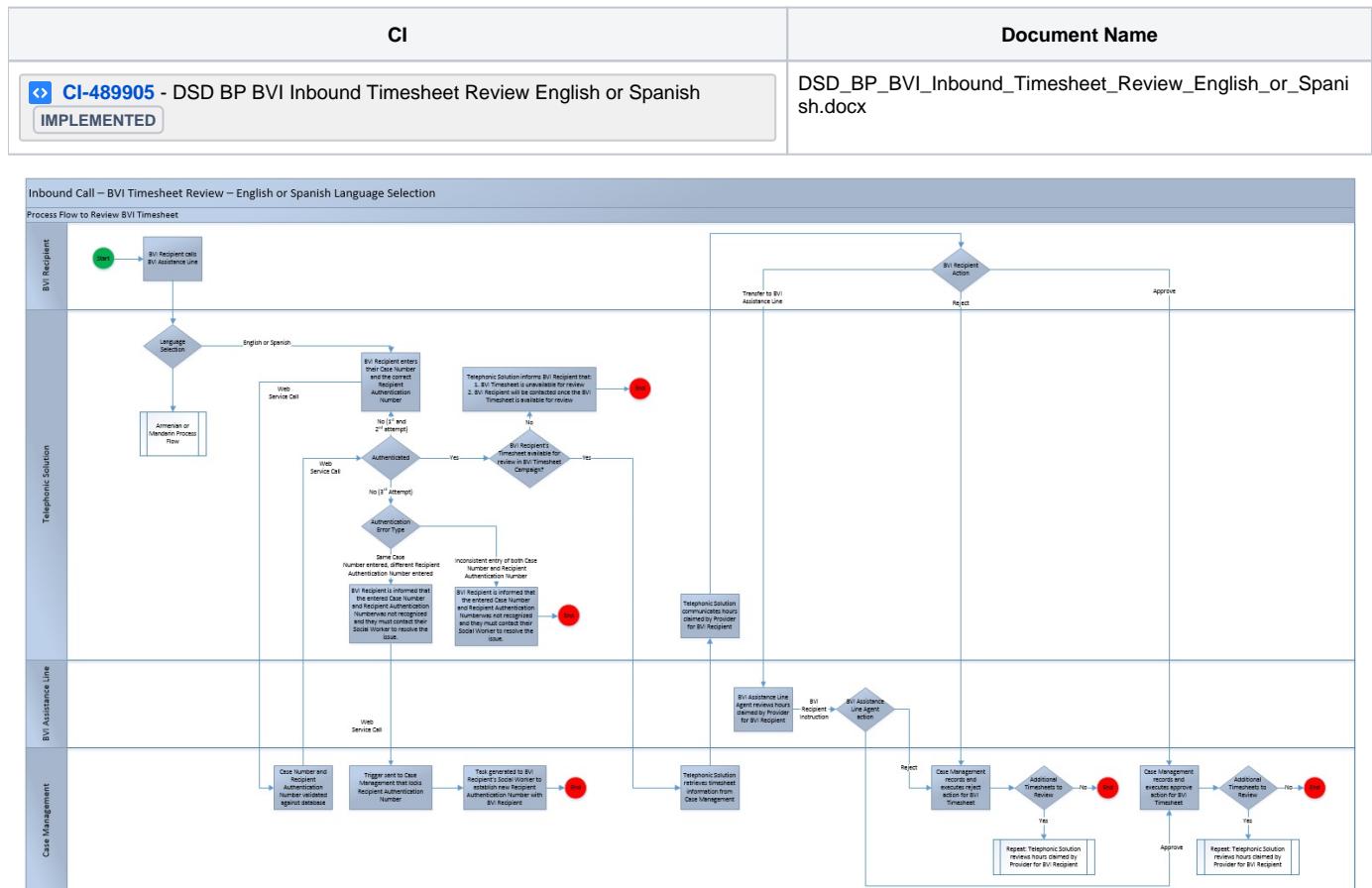


Figure – BVI Assistance Line Timesheet Review – Inbound – English or Spanish

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow/BVI Assistance Line Timesheet Review – Inbound – Armenian or Mandarin

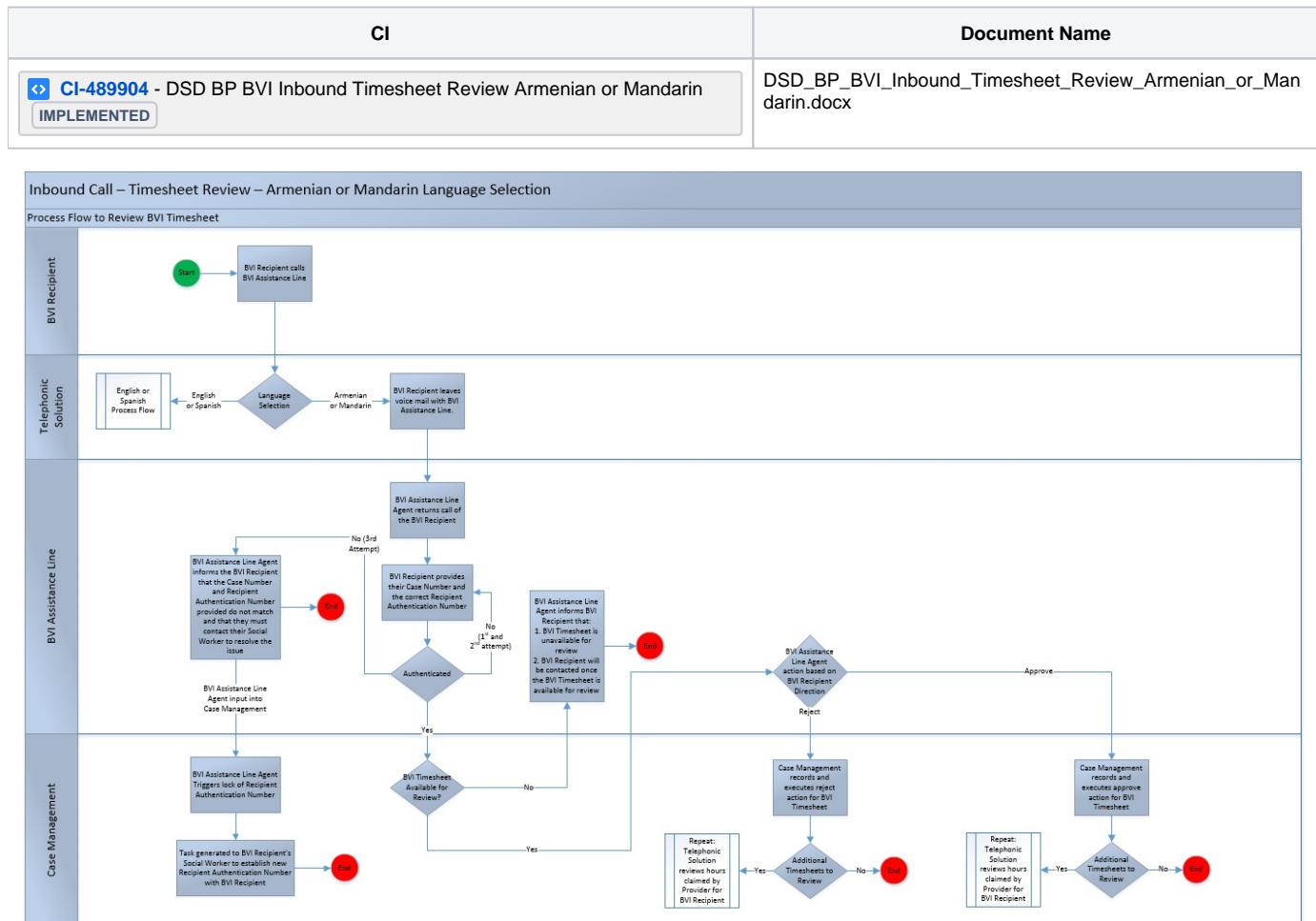


Figure – BVI Assistance Line Timesheet Review – Inbound – Armenian or Mandarin

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow/BVI Assistance Line Timesheet Review – Outbound – English or Spanish

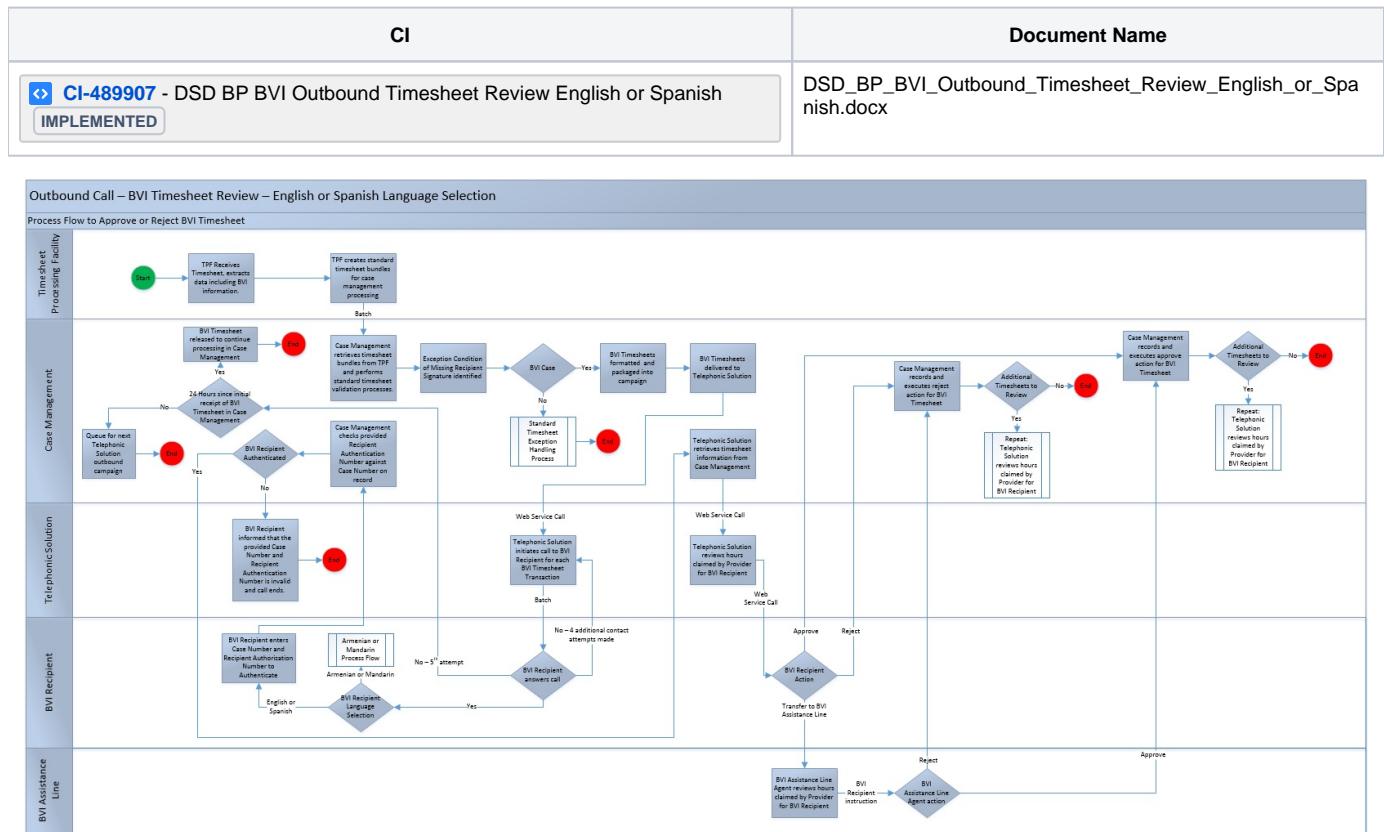


Figure – BVI Assistance Line Timesheet Review – Outbound – English or Spanish

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow/BVI Assistance Line Timesheet Review – Outbound – Armenian or Mandarin

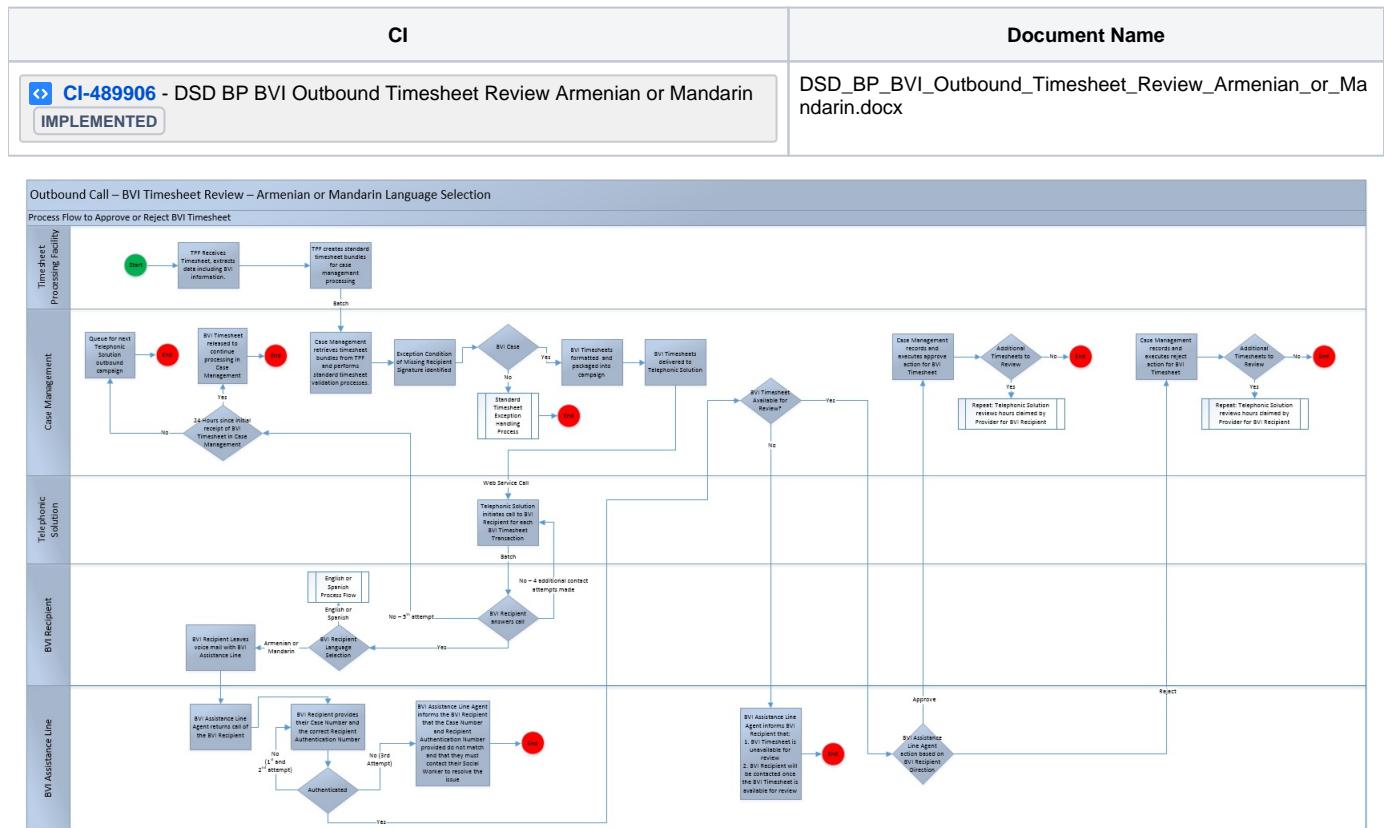
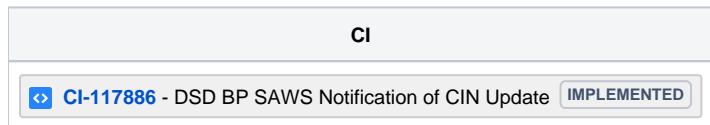


Figure – BVI Assistance Line Timesheet Review – Outbound – Armenian and Mandarin

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow/SAWS Notification of CIN Update



When SAWS updates or re-links a CIN for an IHSS individual, SAWS will send the IHSS Recipient's new CIN information to CMIPS (SAWS TRIGGER: S2 transaction).

WS: Notification of CIN Update

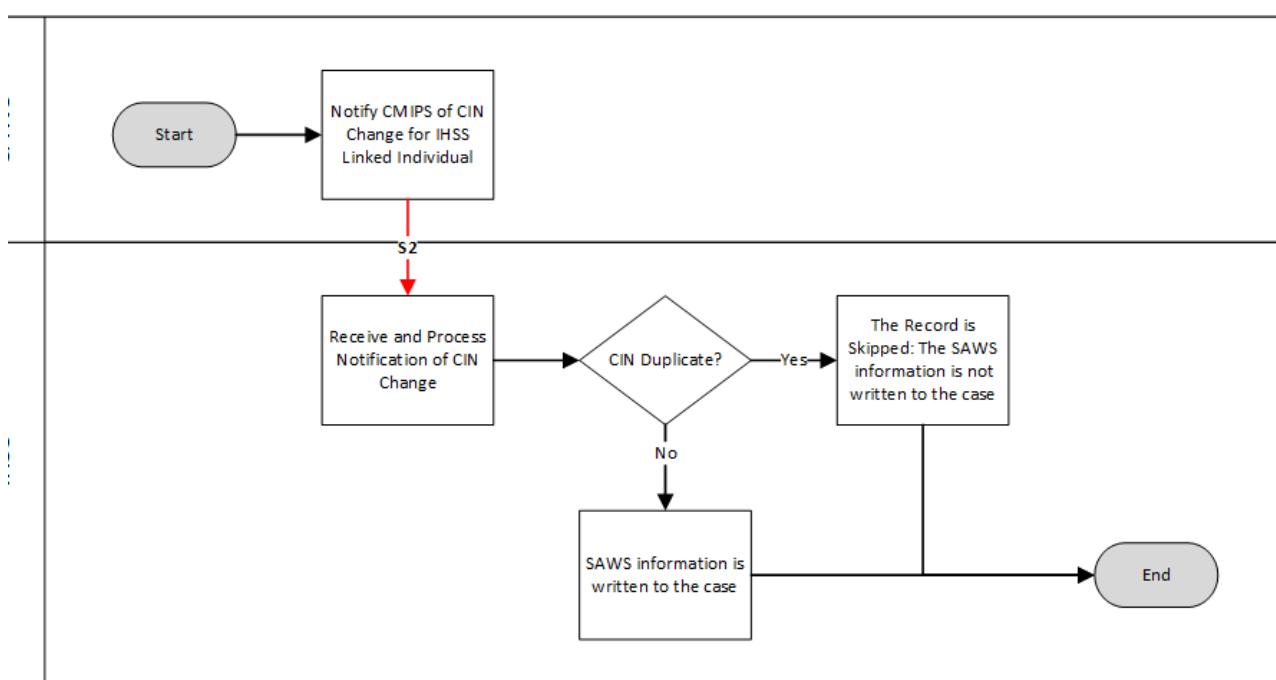


Figure – SAWS Notification of CIN Update

DSD 25/Recip CM & OS – Case Maintenance/Business Process Flow/SAWS Notification of SSN Update

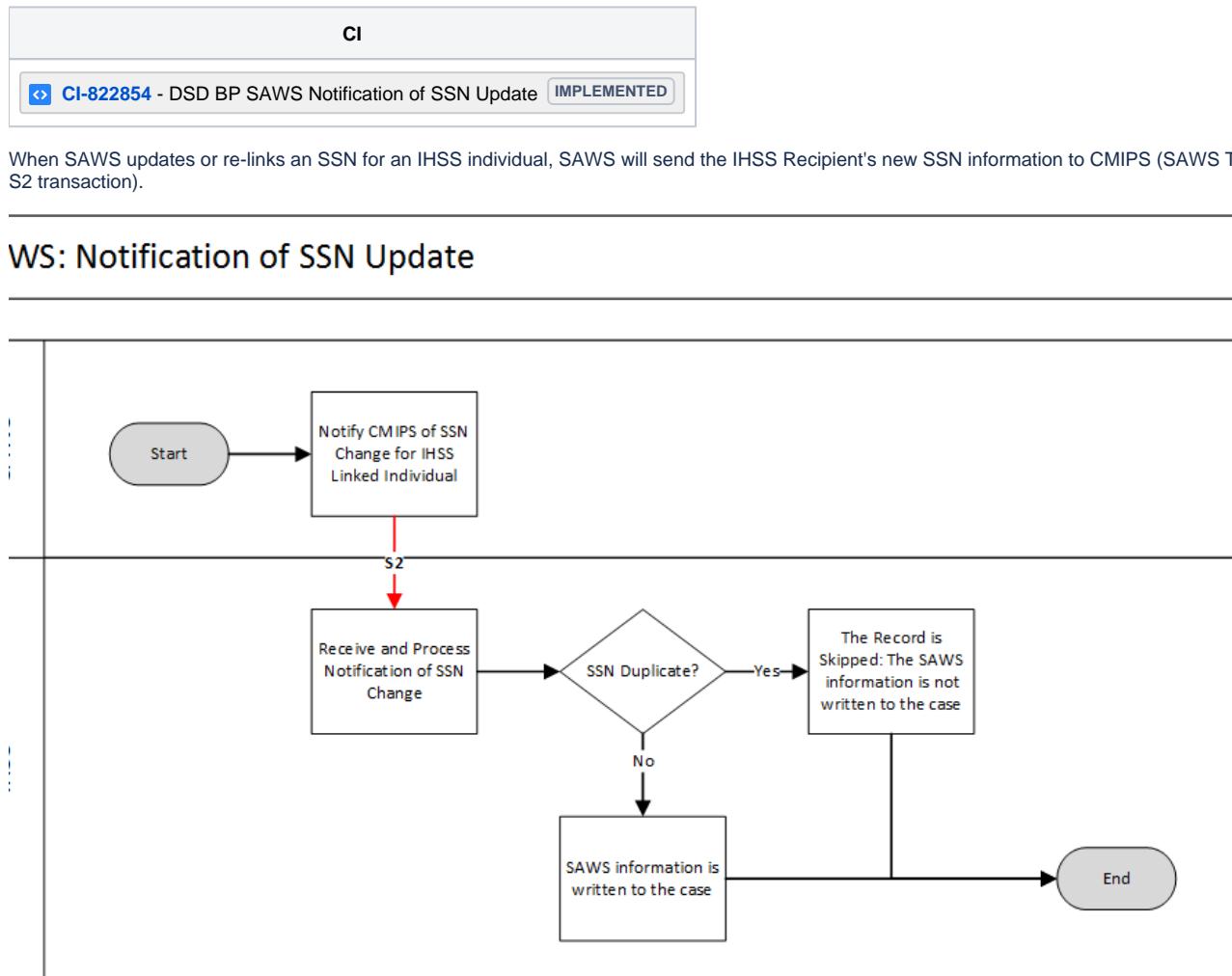


Figure – SAWS Notification of SSN Update

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /WPCS Hours

CI	Document Name
CI-67731 - DSD SF WPCS Hours IMPLEMENTED	DSD_SF_WPCS_Hours.doc

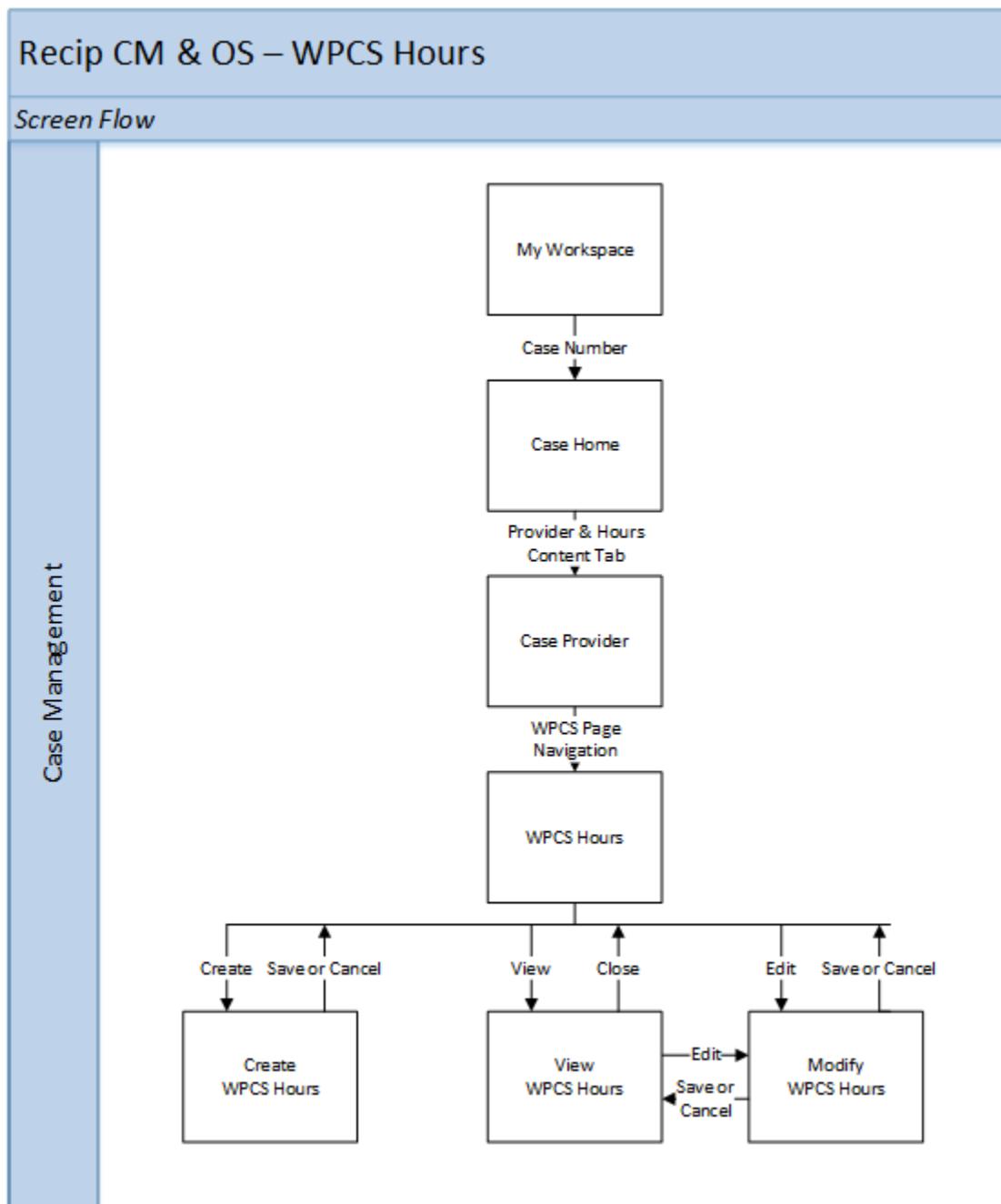


Figure – WPCS Hours

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Workplace Hours

CI	Document Name
CI-67727 - DSD SF Workplace Hours IMPLEMENTED	DSD_SF_Workplace_Hours.doc

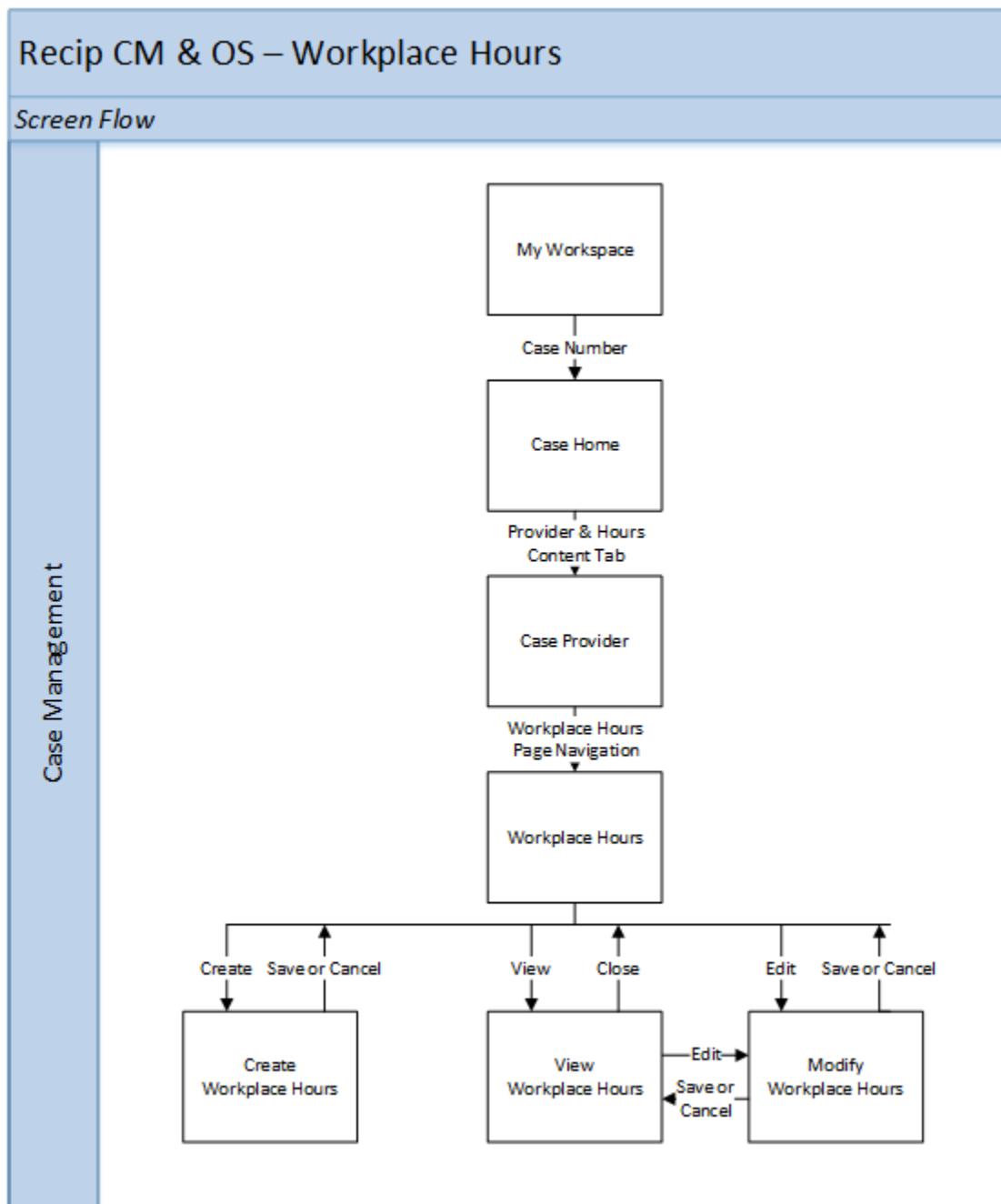


Figure – Workplace Hours

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Contractor Workspace – County Contractor Invoice Processing

CI	Document Name
 CI-67732 - DSD SF Contractor Workspace County Contractor Invoice Processing IMPLEMENTED	DSD_SF_Contractor_Workspace_County_Contractor_Invoice_Processing.doc

County Contractor Workspace

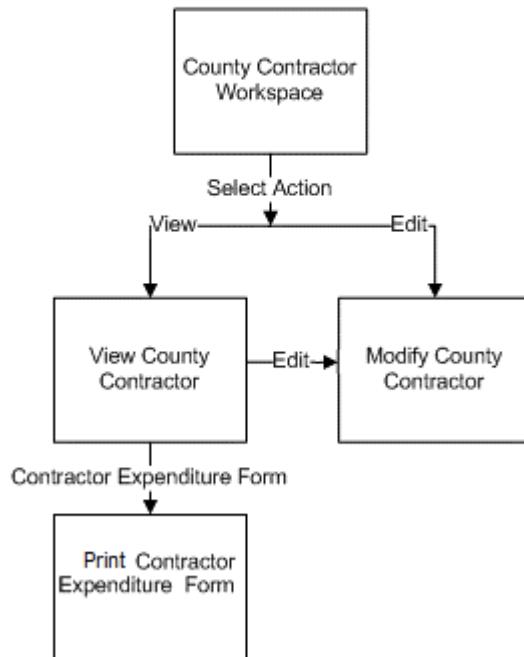


Figure – County Contractor Invoice Processing

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Homemaker Workspace

CI	Document Name
 CI-67730 - DSD SF Homemaker Workspace Timesheet Processing IMPLEMENTED	DSD_SF_Homemaker_Workspace_Timesheet_Processing.doc

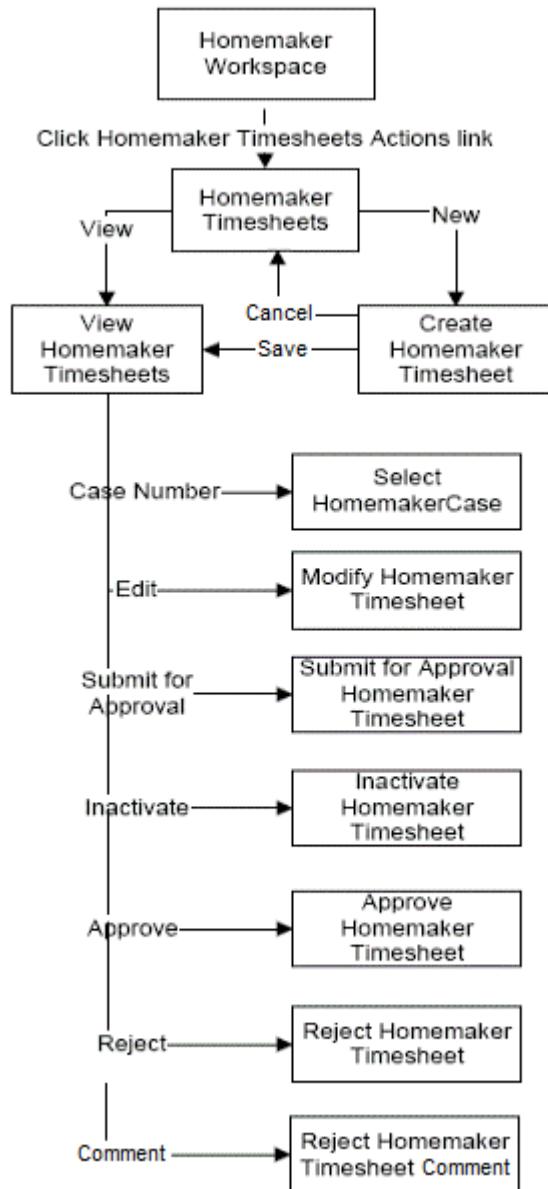


Figure – Homemaker Workspace Timesheet Processing

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Case Home

CI	Document Name
 CI-67725 - DSD SF Case Home IMPLEMENTED	DSD_SF_Case_Home.doc

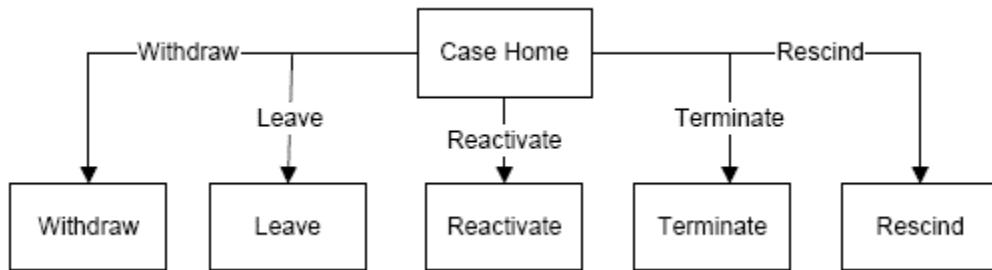


Figure – Case Home (Withdraw, Leave, Reactivate, Terminate and Rescind)

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Inter-County Transfer

CI	Document Name
 CI-67729 - DSD SF InterCounty Transfer IMPLEMENTED	DSD_SF_InterCounty_Transfer.doc

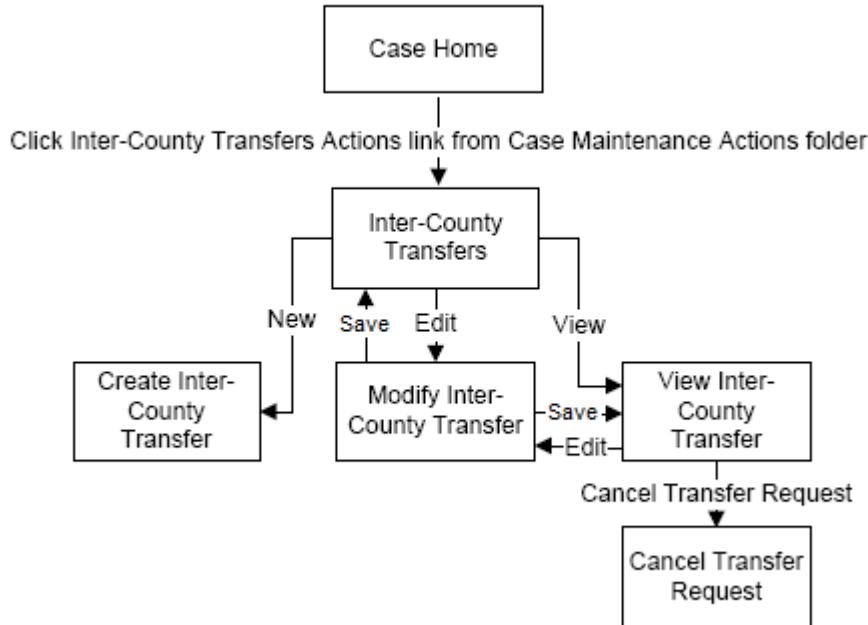


Figure – Inter-County Transfer

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /State Hearing

CI	Document Name
CI-67726 - DSD SF State Hearing IMPLEMENTED	DSD_SF_State_Hearing.doc

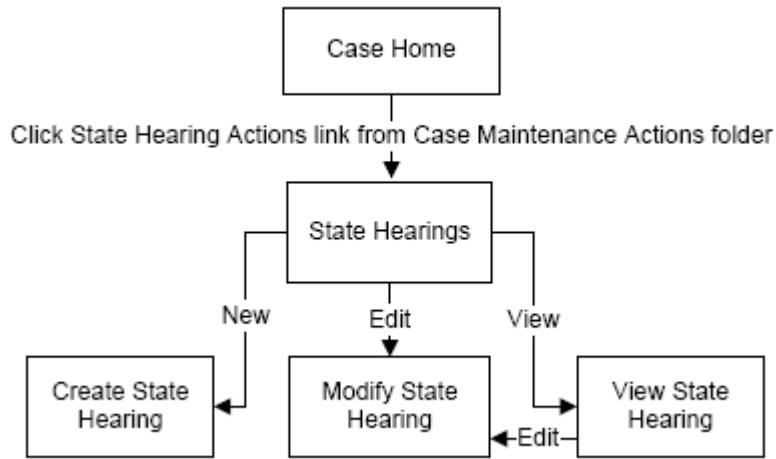


Figure – State Hearing

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Medi-Cal Eligibility

CI	Document Name
 CI-67601 - DSD SF MediCal Eligibility and SAWS Eligibility IMPLEMENTED	DSD_SF_MediCal_Eligibility_and_SAWS_Eligibility.doc

M medi-Cal Eligibility

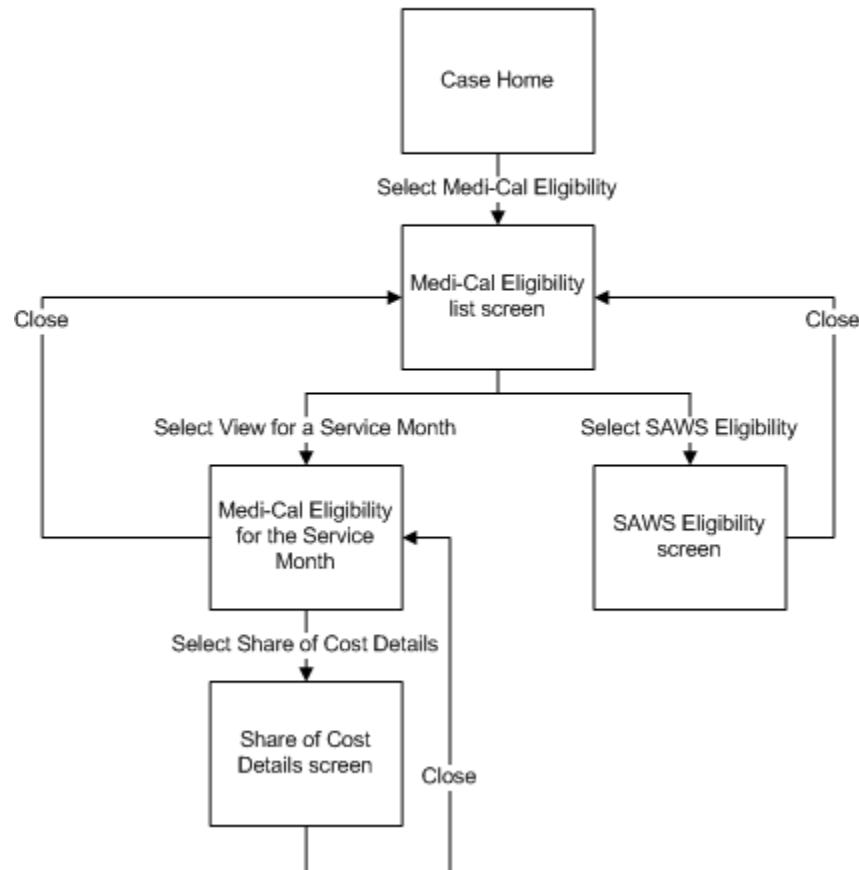


Figure – Medi-Cal Eligibility and SAWS Eligibility

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Recipient Overtime

CI	Document Name
CI-480911 - DSD SF Recipient Overtime [IMPLEMENTED]	DSD_SF_Recipient_Overtime.doc

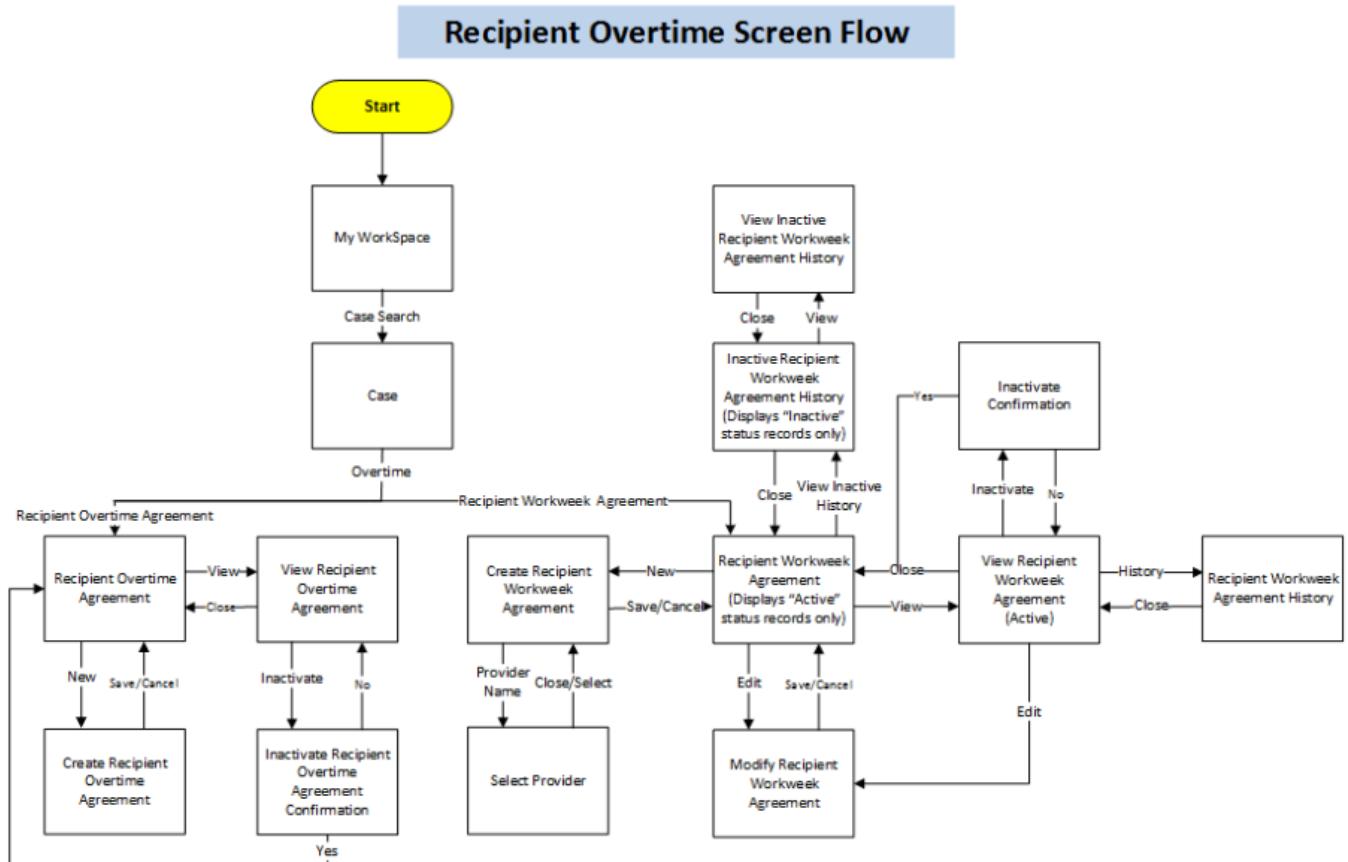


Figure – Recipient Overtime

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Blind or Visually Impaired

CI	Document Name
CI-486307 - DSD SF Blind or Visually Impaired IMPLEMENTED	DSD_SF_Blind_or_Visually_Impaired.docx

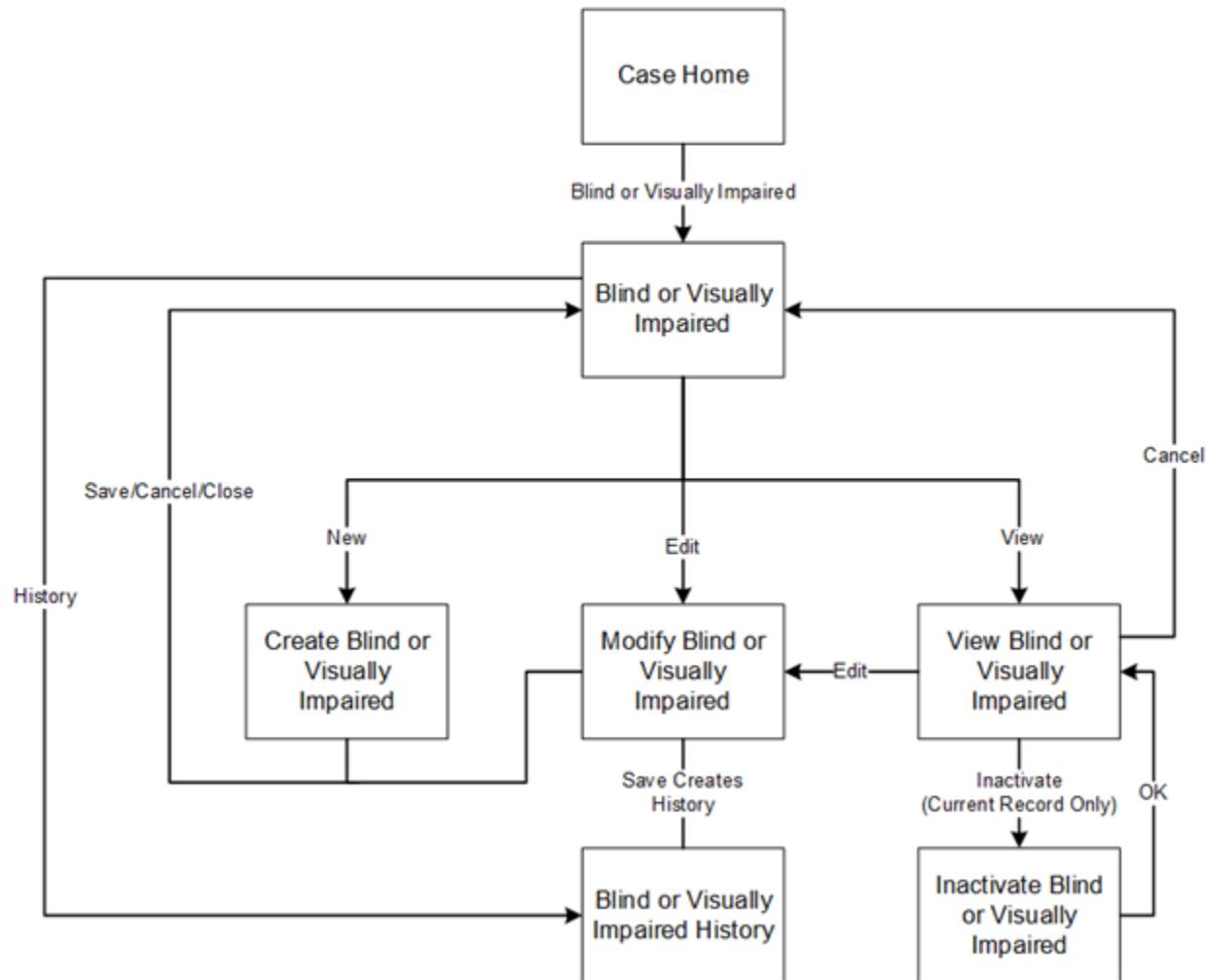


Figure – Blind or Visually Impaired

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Forms and Correspondence

CI	Document Name
CI-507510 - DSD SF Forms and Correspondence IMPLEMENTED	DSD_SF_Forms_and_Correspondence.docx

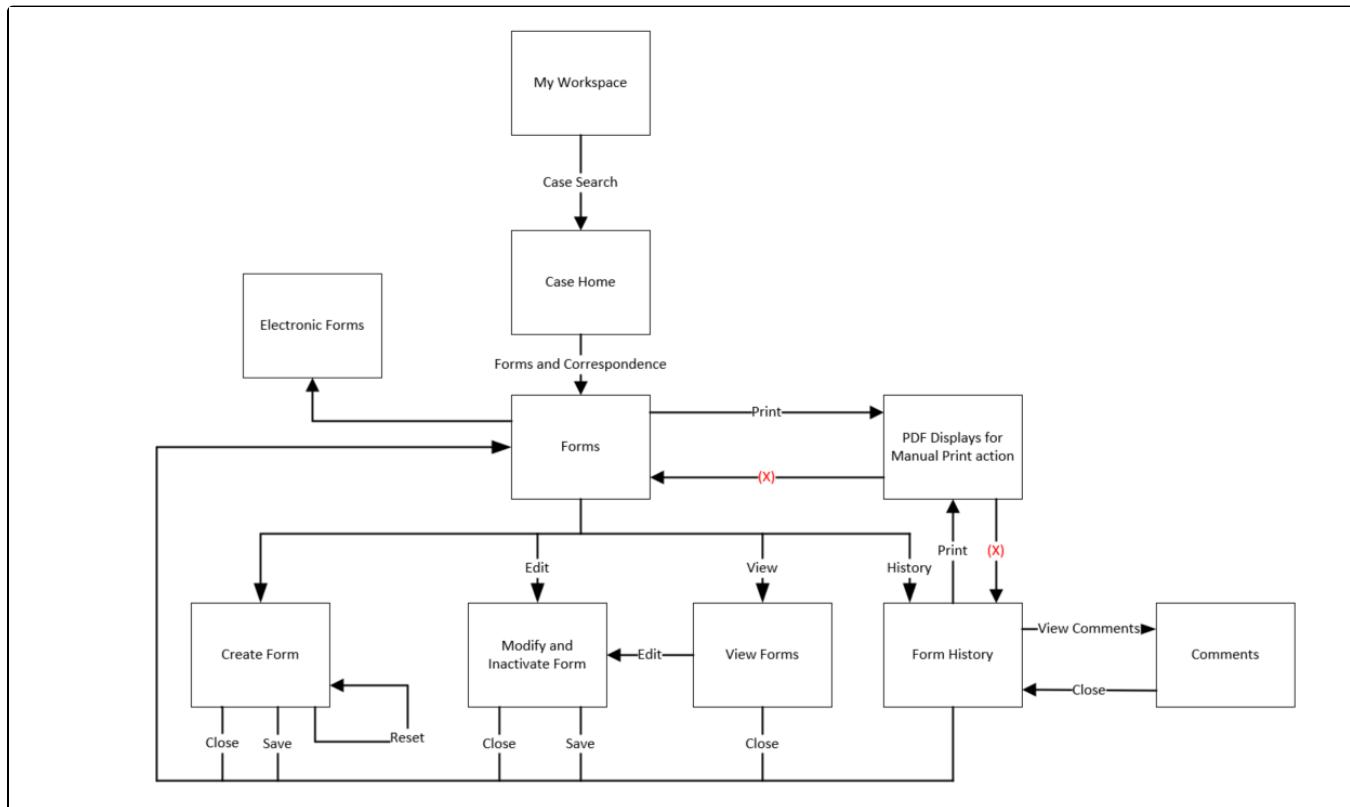


Figure – Forms and Correspondence

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Recipient Flexible Hours

CI	Document Name
CI-675568 - DSD SF Recipient Flexible Hours IMPLEMENTED	DSD_SF_Recipient_Flexible_Hours.docx

Recipient Flexible Hours Screen Flow

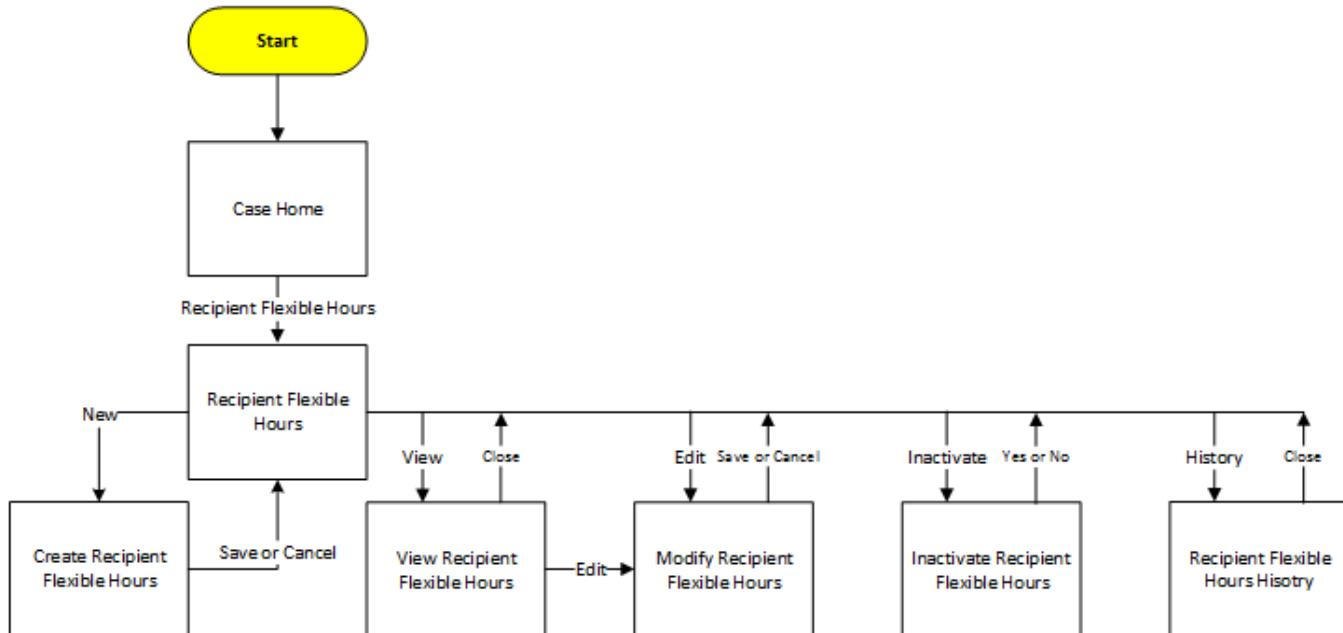


Figure – Recipient Flexible Hours

DSD 25/Recip CM & OS – Case Maintenance/Screen Flows /Unannounced Home Visit

CI	Document Name
 CI-718079 - DSD SF Unannounced Home Visit IMPLEMENTED	DSD_SF_Unannounced_Home_Visit.docx

Unannounced Home Visit

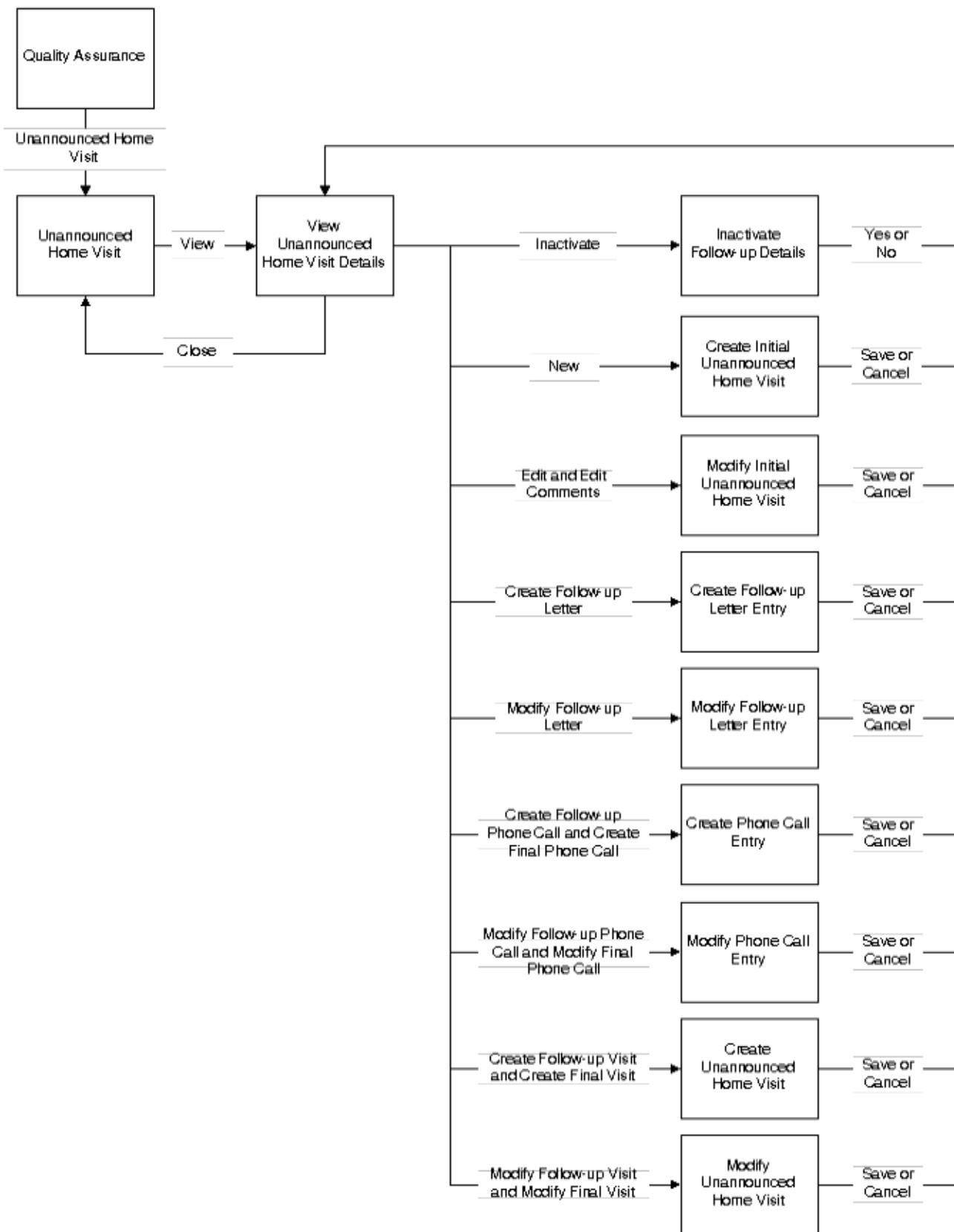


Figure – Unannounced Home Visit

DSD 25/Recip CM & OS – Case Maintenance/Initiation & Triggers, Pre-Conditions and Post Conditions

ID	Business Function	Initiation/Triggers	Pre-Conditions	Post Conditions
1	State Hearing	Recipient files an appeal based upon case assessment.	Recipient case exists with active evidence (active evidence may be associated with a case Denial or Termination).	State Hearing created allows the tracking of State Hearing Outcome
2	WPCS Hours Assignment	In-Home Operations (IHO) staff determines an IHSS Recipient is eligible for Waiver Personal Care Services (WPCS) hours.	Recipient case exists with active evidence and authorized hours for the IHSS Plus Option (IPO), or Personal Care Services Program (PCSP).	WPCS screens allow the indication of WPCS authorized hours with associated Start and End Dates WPCS payments process against the indicated hours for the designated time period
3	Workplace Hours	Recipient indicates that some of the authorized hours need to be provided in his/her workplace.	Recipient case exists with active evidence with authorized hours.	Workplace Hours screen allows the indication of a number of authorized hours to be provided in the workplace associated Start and End Dates These hours are used for reporting only and no payment processing will occur against these hours
4	Case Maintenance	Upon any Provider rate change, CMIPS shall calculate, track and report the "Case Cost".	CMIPS shall calculate, track and report the IHSS Recipient "Case Cost" of PCSP/IPO /IHSS-R services.	"Case Cost" calculated to the case specific rates The Case Cost does not display on the Recipient case, but is used for reporting only
5	Case Maintenance	Upon any Provider rate change, CMIPS shall calculate, track and report the "SOC Compare Cost".	CMIPS shall calculate, track and report the "SOC Compare Cost" of PCSP/IPO/IHSS-R services by multiplying the county-specific rates.	"SOC Compare Cost" calculated and reported on each Recipient case with Status of Eligible or Presumptive Eligible
6	Case Maintenance	When a case is reactivated CMIPS shall: <ul style="list-style-type: none"> • Reset the Case Status • Reset the Referral Date to the Current Date • Reset the Application Date to the Current Date • Reset the Medi-Cal Eligibility Referral Date • Reset the Medi-Cal Initial Eligibility Notification Date • Reset the County • Reset the District • Reset the Health Care Certification Date and Health Care Certification Reason fields • Reset the Disaster Preparedness • Reset the following fields on the Person Home • Effective Date • Reported Date of Death • Death Notification Source • Death Date • Death Outcome 	Case must exist in one of the following statuses to be reactivated: <ul style="list-style-type: none"> • Application Withdrawn • Terminated • Denied * 	<p>When the Reactivate Case screen is saved:</p> <ul style="list-style-type: none"> • The Case Status to Pending • The Referral Date is set to the current date or user entered Date • The Application Date is set to the current date or user entered Date • The Medi-Cal Eligibility Referral Date is set to blank • The Medi-Cal Initial Eligibility Notification Date is set to blank • The County is set to the County associated with the Assigned Worker • The District Office is set to the District Office associated with the Assigned Worker • Set all fields on the Health Care Certification screen to blank • Set the following fields on the Disaster Preparedness screen to blank: <ul style="list-style-type: none"> • Degree of Contact • Special Impairment • Life Support Supply Need • Extreme Weather • Comments <p>On the Person Home:</p> <ul style="list-style-type: none"> • Set the Effective Date to the current date • Set the Reported Date of Death to blank • Set the Death Notification Source to blank • Set the Death Date to blank • Set the Death Outcome to blank
7	Case Maintenance	When a Denied case is rescinded CMIPS shall: Set the case status to Pending Retain the previous dates: IHSS Referral Date IHSS Application Date	Case must exist in Denied status.	Case status set to Pending IHSS Referral Date set to previous IHSS Referral Date IHSS Application Date set to previous IHSS Application Date
8	Case Maintenance	When a Terminated case is rescinded, CMIPS shall rollback the case to the last eligible Authorization Period with the previously indicated status, End Date, and Total Auth to Purchase After Reduced Hours.	Case must exist in Terminated status.	Roll-back status to Previous Eligible or Presumptive Eligible Status Roll-back Authorization End Date to previous Authorization End Date Roll-back Total Auth to Purchase After Reduced Hours to previous Total Auth to Purchase After Reduced Hours

DSD 25/Recip CM & OS – Case Maintenance/Initiation & Triggers, Pre-Conditions and Post Conditions/Overtime Calculations and Actions

The following table provides a crosswalk of system actions and whether or not the action triggers an overtime action or calculation.

#	Action	End Date Provider Workweek Agreement (PWA)	End Date Recipient Workweek Agreement (RWA)	Trigger Provider Recalculate Weekly Maximum	Trigger Provider Recalculate Monthly Overtime Maximum	Trigger Recipient Recalculate Weekly Maximum	Trigger Recipient Recalculate Monthly Overtime Maximum	Trigger Number of Active Providers (Case Home)	Trigger Number of Active Cases (Provider Details)
1	Online Provider – Leave/Terminate and "End Date Workweek Agreement" is checked (IHSS or WPCS)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
2	Online -Case – Leave/ Terminate	Yes, but only for records associated with Leave/Terminated case	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	Batch Case –Terminate (Batch)	Yes, but only for records associated with Leave/Terminated case	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4	Online – Add Provider (IHSS or WPCS)	No	No	Yes	Yes	Yes	Yes	Yes	Yes
5	Provider made "Ineligible" (Batch)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6	Online - Provider made "Ineligible"	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
7	Case Authorization – Eligible or Presumptive Eligible and Auth to Purchase after Adjusted Hours increase or decrease	Yes	Yes	Yes	Yes	Yes	Yes	No	No
8	WPCS hours increase or decrease	Yes	Yes	Yes	Yes	Yes	Yes	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/WPCS Hours

CI	Document Name
CI-67707 - DSD SC WPCS Hours IMPLEMENTED	DSD_SC_WPCS_Hours.doc

When the WPCS Hours action is selected from the Provider & Hours Content Tab the WPCS Hours list screen displays.

Action	WPCS Hours	Start Date	End Date
View Edit...	03:00	07/01/2020	07/30/2020
View Edit...	288:00	05/01/2019	05/30/2019
View Edit...	257:00	07/01/2016	04/30/2019
View Edit...	300:00	04/01/2013	06/30/2016
View Edit...	300:00	12/01/2012	03/31/2013
View Edit...	304:00	11/01/2012	11/30/2012
View Edit...	304:00	10/01/2012	10/31/2012
View Edit...	304:00	09/01/2011	09/30/2011
View Edit...	304:00	08/01/2011	08/31/2011
View Edit...	304:00	07/01/2011	07/31/2011
View Edit...	303:48	06/01/2011	06/30/2011
View Edit...	303:48	05/01/2011	05/31/2011
View Edit...	303:48	04/01/2011	04/30/2011
View Edit...	303:48	03/01/2011	03/31/2011
View Edit...	304:00	02/01/2011	02/28/2011
View Edit...	304:00	01/01/2011	01/31/2011
View Edit...	304:00	12/01/2010	12/31/2010
View Edit...	30:00	11/01/2010	11/30/2010

Figure – WPCS Hours

Actions/Functions

The following actions are associated with the WPCS Hours list screen:

Action	Function
New	Displays the Create WPCS Hours screen
View	Displays the View WPCS Hours screen
Edit	Displays the Modify WPCS Hours screen

Data Elements

The following data elements are associated with the WPCS Hours list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
WPCS Hours	Number of authorized WPCS Hours, Displays in HH:MM format.	Integer	No	No	No

Start Date	The date on which the WPCS Hours indicated are effective. Displays in MM/DD/YYYY format.	Date	No	No	No
End Date	The date on which the WPCS Hours indicated are no longer effective. Displays in MM /DD/YYYY format.	Date	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create WPCS Hours

CI	Document Name
CI-67708 - DSD SC Create WPCS Hours [IMPLEMENTED]	DSD_SC_Create_WPCS_Hours.doc

When the New action is selected from the WPCS Hours list screen, the Create WPCS Hours pop-up displays. The End Date field on the pop-up should remain blank until the WPCS Hours indicated are no longer be payable (terminated), or the current hours segment increases or decreases. CMIPS does not allow payment of WPCS hours past the indicated End Date.

Figure – Create WPCS Hours

Actions/Functions

The following actions are associated with the Create WPCS Hours pop-up:

Action	Function
Save	Saves data entered and returns the user to the WPCS Hours list screen.
Cancel	Cancels the screen and returns the user to the WPCS Hours list screen.

Data Elements

The following data elements are associated with the Create WPCS Hours pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
WPCS Hours (HH:MM)	Number of authorized WPCS hour. Displays in HH:MM format.	Integer	Yes	No	Yes
Start Date	The date on which the WPCS Hour indicated are effective. Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
End Date	The date on which the WPCS Hours indicated are no longer effective. Displays in MM/DD/YYYY format.	Date	No	If no End Date is entered when screen is saved the system high date 12/31/9999 is assigned by system.	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View WPCS Hours

CI	Document Name
CI-67712 - DSD SC View WPCS Hours IMPLEMENTED	DSD_SC_View_WPCS_Hours.doc

When the View link is selected from the WPCS Hours screen the View WPCS Hours screen displays.

Figure – View WPCS Hours

Actions/Functions

The following actions are associated with the View WPCS Hours screen:

Action	Function
Edit	Displays the Modify WPCS Hours pop-up.
Close	Closes the screen and returns the user to the WPCS Hours screen

Data Elements

The following data elements are associated with the View WPCS Hours screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
WPCS Hours (HH:MM)	Number of authorized WPCS hours. Displays in HH:MM format.	Integer	No	No	No
Start Date	The date on which the WPCS Hours indicated are effective. Displays in MM/DD/YYYY format.	Date	No	No	No
End Date	The date on which the WPCS Hours indicated are no longer effective. Displays in MM/DD/YYYY format.	Date	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify WPCS Hours

CI	Document Name
CI-67674 - DSD SC Modify WPCS Hours IMPLEMENTED	DSD_SC_Modify_WPCS_Hours.doc

When the Edit link is selected from the WPCS Hours list or the View WPCS Hours screen the Modify WPCS Hours pop-up displays.

The screenshot shows a modal dialog titled "Modify WPCS Hours". Inside, there's a "Details" section with a dropdown menu. Below it are input fields: "WPCS Hours (HH:MM):" with values "288" and "00", "Start Date:" with value "05/01/2019" and a calendar icon, and "End Date:" with value "12/31/9999" and a calendar icon. At the bottom are "Save" and "Cancel" buttons.

Figure – Modify WPCS Hours

Actions/Functions

The following actions are associated with the Modify WPCS Hours pop-up:

Action	Function
Save	Saves entered data and returns the user to the WPCS Hours list screen.
Cancel	Cancels the action and returns the user to the screen of origin.

Data Elements

The following data elements are associated with the Modify WPCS Hours pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
WPCS Hours (HH:MM)	Number of authorized WPCS hours. Displays in HH:MM format.	Integer	Yes	No	Yes
Start Date	The date on which the WPCS Hours indicated are effective. Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
End Date	The date on which the WPCS Hours indicated are no longer effective. Displays in MM /DD/YYYY format.	Date	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/County Contract Coordinator – County Contractor

CI	Document Name
 CI-67713 - DSD SC County Contract Coordinator County Contractor IMPLEMENTED	DSD_SC_County_Contract_Coordinator_County_Contractor.doc

When a user with a Contract Coordinator security role logs on to CMIPS and selects the County Contractor Invoice from the expanded Shortcuts Panel, the County Contractor Invoice list screen displays. This screen displays the County Contractor invoices processed for the user's county.

CMIPS II Case Management Information Payroll System II					
				Case Number	Search
SHORTCUTS		County Contractor Invoice			
My Workspace	Search	County Contractor Invoice			
Wage Rate	County Contractor	County Contractor: San Francisco			
County Contractor	County Contractor Invoice				
Homemaker/PA Contract					
Action	Billing Month	Invoice Number	Processed Date	Authorized Amount	Status
View	07/2020	[REDACTED]	08/17/2020	\$1,328.33	Paid
View	06/2020	[REDACTED]	07/16/2020	\$2,100,375.19	Paid
View	05/2020	[REDACTED]	06/03/2020	\$171,674.22	Paid
View	05/2020	[REDACTED]	06/16/2020	\$3,647,313.91	Paid
View	04/2020	[REDACTED]	05/18/2020	\$3,240.99	Paid
View	03/2020	[REDACTED]	05/06/2020	\$1,947,522.77	Paid
View	02/2020	[REDACTED]	03/16/2020	\$1,994,716.91	Paid
View	01/2020	[REDACTED]	02/20/2020	\$3,135,225.95	Paid
View	12/2019	[REDACTED]	01/27/2020	\$5,963,753.73	Paid
View	11/2019	[REDACTED]	01/16/2020	\$28,601.58	Paid
View	10/2019	[REDACTED]	11/20/2019	\$147,515.39	Paid
View	09/2019	[REDACTED]	10/16/2019	\$1,940,167.38	Paid
View	08/2019	[REDACTED]	09/24/2019	\$2,053,602.01	Paid
View	07/2019	[REDACTED]	08/20/2019	\$2,605,700.18	Paid
View	06/2019	[REDACTED]	07/16/2019	\$1,845,460.10	Paid
View	05/2019	[REDACTED]	06/17/2019	\$1,981,622.11	Paid
View	04/2019	[REDACTED]	06/19/2019	\$1,990,678.25	Paid
View	03/2019	[REDACTED]	04/16/2019	\$1,925,757.00	Paid
View	02/2019	[REDACTED]	04/10/2019	\$4,643,713.92	Paid
View	01/2019	[REDACTED]	02/19/2019	\$1,926,428.94	Paid
View	12/2018	[REDACTED]	01/16/2019	\$1,902,578.81	Paid
View	11/2018	[REDACTED]	12/27/2018	\$1,953,775.67	Paid
View	10/2018	[REDACTED]	11/16/2018	\$1,948,152.31	Paid
View	09/2018	[REDACTED]	10/16/2018	\$1,792,010.78	Paid
View	08/2018	[REDACTED]	09/17/2018	\$2,001,006.57	Paid
View	07/2018	[REDACTED]	08/16/2018	\$2,036,889.33	Paid
View	06/2018	[REDACTED]	07/17/2018	\$2,020,786.82	Paid
View	05/2018	[REDACTED]	06/18/2018	\$1,863,873.58	Paid
View	04/2018	[REDACTED]	05/16/2018	\$1,778,551.08	Paid
View	03/2018	[REDACTED]	04/16/2018	\$1,838,529.06	Paid
View	02/2018	[REDACTED]	03/16/2018	\$1,664,063.55	Paid
View	12/2017	[REDACTED]	02/07/2018	\$1,768,313.38	Paid
View	10/2017	[REDACTED]	11/01/2017	\$835,547.85	Paid
View	10/2017	[REDACTED]	11/16/2017	\$837,946.56	Paid
View	09/2017	[REDACTED]	10/02/2017	\$898,712.25	Paid
View	09/2017	[REDACTED]	10/16/2017	\$1,698,704.11	Paid
View	08/2017	[REDACTED]	09/01/2017	\$29,617.54	Paid
View	08/2017	[REDACTED]	09/18/2017	\$938,586.44	Paid
View	07/2017	[REDACTED]	08/01/2017	\$671,099.69	Paid
View	07/2017	[REDACTED]	08/16/2017	\$687,862.16	Paid
View	06/2017	[REDACTED]	07/03/2017	\$707,486.77	Paid
View	06/2017	[REDACTED]	07/17/2017	\$679,339.53	Paid
View	05/2017	[REDACTED]	06/01/2017	\$708,341.51	Paid
View	05/2017	[REDACTED]	06/16/2017	\$750,309.52	Paid
View	04/2017	[REDACTED]	05/01/2017	\$691,872.92	Paid
View	04/2017	[REDACTED]	05/16/2017	\$776,265.86	Paid
View	03/2017	[REDACTED]	04/10/2017	\$822,462.27	Paid
View	03/2017	[REDACTED]	04/17/2017	\$777,851.47	Paid
View	02/2017	[REDACTED]	03/01/2017	\$769,214.80	Paid
View	02/2017	[REDACTED]	03/16/2017	\$633,551.08	Paid

Figure – County Contractor

Actions/Functions

The following actions are associated with the County Contractor list screen:

Action	Function
View	Displays the View County Contractor screen.
Edit	Displays the Modify County Contractor pop-up. Available only when Status is Pending.

Data Elements

The following data elements are associated with the County Contractor list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Billing Month	The Billing Month associated with the Contractor Invoice (MM/YYYY). Note: For those counties which submit invoices twice monthly two rows for the same calendar month will display when both invoices have been processed.	Date	No	No	No
Invoice Number	Invoice Number submitted by the Contractor.	Number	No	No	No
Processed Date	Date the invoice was processed in CMIPS. Displays in MM/DD/YYYY format.	Date	No	No	No
Authorized Amount	The amount authorized for payment for the processed invoice.	Decimal	No	No	No
Status	Invoice status.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/County Contract Coordinator – View County Contractor

CI	Document Name
CI-67714 - DSD SC County Contract Coordinator View County Contractor IMPLEMENTED	DSD_SC_County_Contract_Coordinator_View_County_Contractor.doc

When the View link is selected from the County Contractor Invoice list screen, the View County Contractor screen displays. This screen displays the details and processing results for the Contractor Invoice that was submitted to CMIPS. Contractor Invoices are submitted and processed electronically.

The screenshot shows the CMIPS II interface with the following details:

- Header:** CMIPS II Case Management Information Payroll System II, Case Number, Welcome.
- Navigation:** SW - Home, SW - Team and Workloads, My Workspace (selected), My Cases, Inbox, Caseload By Users.
- Left Sidebar (Shortcuts):**
 - My Workspace
 - Search
 - Wage Rate
 - County Contractor (selected)
 - County Contractor Invoice
 - Homemaker/PA Contract
- Current Screen:** County Contractor Invoice, View County Contractor: San Francisco.
- Content Area:**
 - Contract Expenditures Form...** (Hyperlink to SOC 432 - Claim For Reimbursement IHSS Program Contract Expenditures.pdf)
 - Invoice Details:**

Invoice Number: 000603	Invoice Date: 07/31/2020	Processed Date: 08/17/2020	Billing Month: 07/2020
Original Amount: \$2,224,410.39	Rejected Amount: \$2,222,909.67	Cut Back Amount: \$172.39	SOC Collected Amount: \$0.00
Authorized Amount: \$1,328.33	Warrant Number: [Redacted]	Paid Date: 11/17/2020	
 - Payment Details:**

Case Count	Funding Source	Service Month	Amount
1	2K - CFCO	06/01/2020	\$492.68
3	2M - PCSP	06/01/2020	\$835.65
- Buttons:** Close.

Figure – View County Contractor

Actions/Functions

The following actions are associated with the View County Contractor screen:

Action	Function
Contract Expenditures Form	Allows the user to print the SOC 432 CLAIM FOR REIMBURSEMENT IN-HOME SUPPORTIVE SERVICES PROGRAM CONTRACT EXPENDITURES form when the Status is Paid. (County Warrant # and Warrant Date are populated/saved by a county user.) Only displays when the Invoice Status, displayed on County Contractor list screen, is Paid. When selected and confirmed a SOC 432 CLAIM FOR REIMBURSEMENT IN-HOME SUPPORTIVE SERVICES PROGRAM CONTRACT EXPENDITURES.pdf will be generated and display to the right of the hyperlink on the screen.
Edit	Displays the Modify County Contractor screen, but is only displayed on records with a Pending status, on the County Contractor list screen.
Close	Closes the screen and displays the County Contractor list screen.

Data Elements

The following data elements are associated with the View County Contractor screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Invoice Details – Displays information for the specific invoice being reviewed					
Invoice #	County Contractor Invoice number.	Number	No	No	No

Invoice Date	County Contractor Invoice Date. Displays in MM/DD/YYYY format.	Date	No	No	No
Processed Date	Date the Invoice was processed in CMIPS. Displays in MM/DD/YYYY format.	Date	No	No	No
Billing Month	Month in which the invoice was billed, displays in MM/YYYY format.	Date	No	No	No
Original Amount	Original Amount of invoice. Calculated value of all hours submitted for payment on the invoice.	Decimal	No	No	No
Rejected Amount	Amount rejected from billing due to errors. Calculated value of all hours submitted that could not be processed due to an error.	Decimal	No	No	No
Cut Back Amount	Amount cut back due to erroneous billing. Calculated value of all hours submitted that should not be paid because they exceed authorized hours or the Recipient was not eligible.	Decimal	No	No	No
SOC Collected Amount	Share Of Cost Collected Amount collected by the Contractor from the IHSS Recipient. Calculated total of Medi-Cal SOC collected by the Contractor for services to a Recipient.	Decimal	No	No	No
Authorized Amount	The Amount authorized to be paid to the Contractor minus Rejections, Cut Backs and SOC amounts (system calculated).	Decimal	No	No	No
Warrant Number	County Warrant number issued to County Contractor for invoice payment.	Number	No	No	No
Paid Date	Date the Warrant was issued to the County Contractor. Displays in MM/DD/YYYY format.	Date	No	No	No

Payment Details - Details associated with the invoice. A single invoice may have billing charges affecting funding sources in multiple service months.

Case Count	The number of cases associated to the indicated Funding Source for the Service Month.	Number	No	No	No
Funding Source	The IHSS Funding Source against which the County Contract payment will be billed.	String	No	No	No
Service Month	The Service Month being paid MM/YYYY format.	Date	No	No	No
Amount	The amount being paid to the Contractor for this Invoice for the Service Month.	Decimal	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Print Contract Expenditures Form

CI	Document Name
CI-67711 - DSD SC Print Contract Expenditures Form IMPLEMENTED	DSD_SC_Print_Contract_Expenditures_Form.doc

When the Contract Expenditures Form link is selected from the View County Contractor screen, the Print Contract Expenditures Form confirmation pop-up displays.

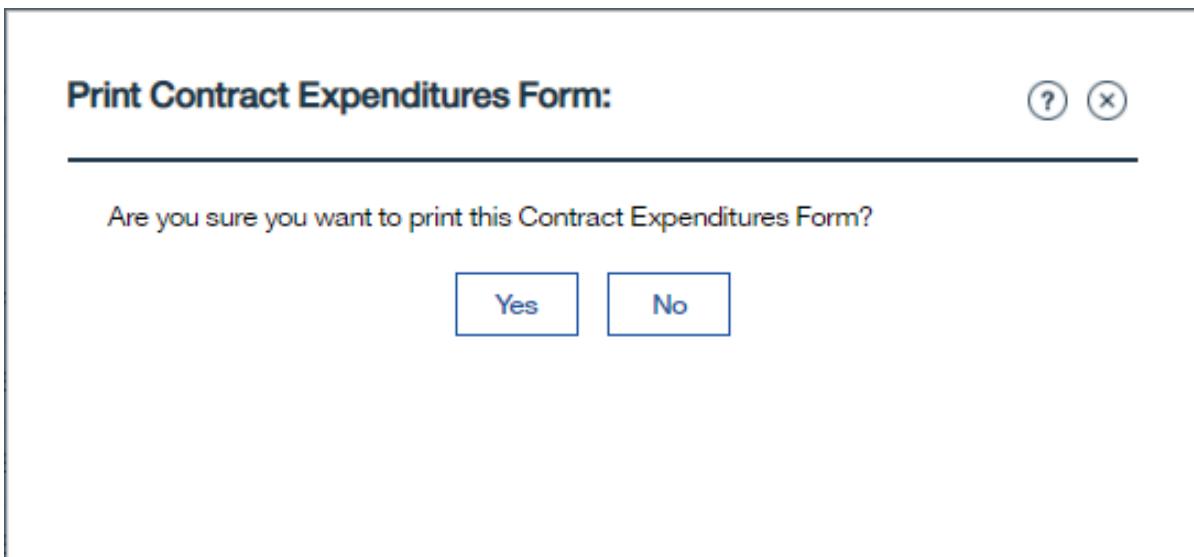


Figure – Print Contract Expenditures Form

Actions/Functions

The following actions are associated with the Print Contract Expenditures Form pop-up:

Action	Function
Yes	Prints the Contract Expenditures Form.
No	Cancels the action and displays the View County Contractor screen.

Data Elements

There are no data elements associated to the Print Contract Expenditures Form pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/County Contract Coordinator – Modify County Contractor

CI	Document Name
CI-67692 - DSD SC County Contract Coordinator Modify County Contractor <small>IMPLEMENTED</small>	DSD_SC_County_Contract_Coordinator_Modify_County_Contractor.doc

When the Edit link is selected from a specific record on the County Contractor list screen or the View County Contractor screen, the Modify County Contractor pop-up displays. This screen is only accessible if the Invoice is in Pending status.

Figure – Modify County Contractor

Actions/Function

The following actions are associated with the Modify County Contractor pop-up.

Action	Function
Save	Saves the changes, sets the Invoice status to Paid and displays the County Contractor list screen.
Cancel	Cancels the screen and displays the County Contractor list screen.

Data Elements

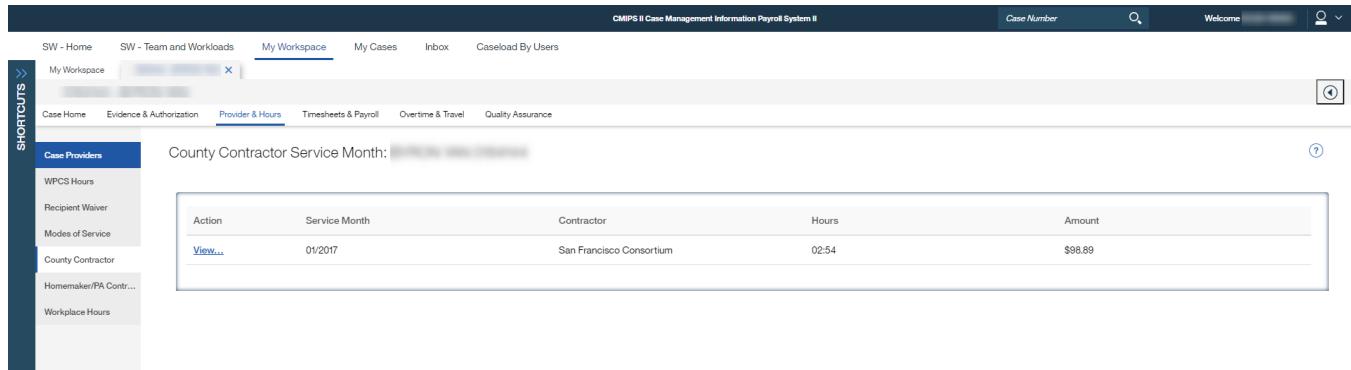
The following data elements are associated with the Modify County Contractor pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Invoice Details					
Invoice Number	Invoice Number	Number	No	No	No
Invoice Date	Invoice Date Of Contract. Displays in MM/DD/YYYY format.	Date	No	No	No
Processed Date	Date the Invoice was processed in CMIPS. Displays in MM/DD/YYYY format.	Date	No	No	No
Billing Month	Month in which the invoice was billed, displays in MM/YYYY format.	Date	No	No	No
Original Amount	Original Amount of invoice	Decimal	No	No	No
Rejected Amount	Amount rejected from billing due to errors	Decimal	No	No	No
Cut Back Amount	Amount cut back due to erroneous billing	Decimal	No	No	No
SOC Collected Amount	Share Of Cost Collected Amount collected by the Contractor from the IHSS Recipient	Decimal	No	No	No
Authorized Amount	The Amount authorized to be paid to the Contractor minus Rejections, Cut Backs and SOC amounts	Decimal	No	No	No
Warrant Number	Warrant Number	Number	No	No	Yes
Paid Date	Paid Date. Displays in MM/DD/YYYY format.	Date	No	No	Yes
Payment Details					
Case Count	The number of cases associated to the indicated Funding Source for the Service Month	Number	No	No	No
Funding Source	Funding Source	String	No	No	No
Service Month	Service Month (Format: MM/YYYY)	Date	No	No	No
Amount	Amount	Decimal	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Case – County Contractor Service Month

CI	Document Name
 CI-67701 - DSD SC Recipient Case County Contractor Service Month IMPLEMENTED	DSD_SC_Recipient_Case_County_Contractor_Service_Month.doc

When the County Contractor link is selected from the Cases left navigation menu for a specific Recipient case, the County Contractor Service Month list screen displays. When a Recipient case with assigned County Contractor Hours has had a contractor invoice processed against it, a service month record will display.



The screenshot shows the CMIPS II system interface. The top navigation bar includes links for SW - Home, SW - Team and Workloads, My Workspace (which is selected), My Cases, Inbox, and Caseload By Users. Below the navigation is a header bar with Case Number, Welcome, and a user icon. A sidebar on the left titled 'SHORTCUTS' contains links for Case Providers, WFCs Hours, Recipient Waiver, Modes of Service, County Contractor, Homemaker/PA Contr..., and Workplace Hours. The main content area is titled 'County Contractor Service Month:' and displays a table with columns: Action, Service Month, Contractor, Hours, and Amount. One record is listed: Action 'View...', Service Month '01/2017', Contractor 'San Francisco Consortium', Hours '02:54', and Amount '\$98.89'.

Figure – County Contractor Service Month

Actions/Functions

The following actions are associated with the County Contractor Service Month screen.

Action	Function
<<Previous	Displays the previous 50 Service Month records. This hyperlink is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of Service Month records (up to 50). This hyperlink is only displayed when there are additional records to be displayed.
View	Displays the View County Contractor Service Month Details screen.

Data Elements

The following data elements are associated with the County Contractor Service Month screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	The service month for which a Contract Invoice was processed against the Recipient case, displays in MM/YYYY format.	Date	No	No	No
Contractor	The contractor submitting the invoice for the service month.	String	No	No	No
Hours	The hour's associated with a service month authorized from the County Contractor Invoice, displays in HH:MM format. If hours were submitted and authorized in multiple billing months, this field will display the aggregated authorized hours.	Integer	No	No	No
Amount	The amount associated to the hours (hours x rate) authorized for the service month. If hours were submitted and authorized in multiple billing months, this field will display the dollars associated with aggregated hours.	Decimal	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Case – View County Contractor Service Month Detail

CI	Document Name
CI-67715 - DSD SC Recipient Case View County Contractor Service Month Detail [IMPLEMENTED]	DSD_SC_Recipient_Case_View_County_Contractor_Service_Month_Detail.doc

When the View link is selected from the County Contractor Service Month screen, the View County Contractor Service Month Detail pop-up displays.

Service Month	Billing Month	Contractor	Hours	Amount
06/2020	06/2020	[REDACTED]	74:46	\$4,070.30

Figure – View County Contractor Service Month Detail

Actions/Functions

The following actions are associated with the View County Contractor Service Month Detail pop-up:

Action	Function
Close	Closes the pop-up and displays the County Contractor Service Month screen.

Data Elements

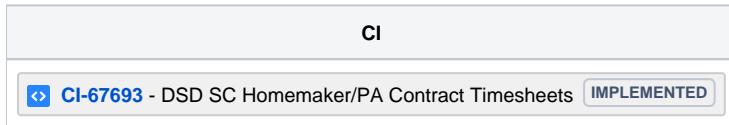
The following data elements are associated with the County Contractor Service Month Detail pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	The service month for which Contract billing was processed against the Recipient case. (MM/YYYY)	Date	No	No	No

Billing Month	The Billing Month in which the services were billed. (MM/YYYY)	Date	No	No	No
Contractor	The name of the Contractor that submitted the invoice for the service month.	String	No	No	No
Hours	The number of hours, for the service month, authorized from the County Contractor Invoice. (HH:MM).	Integer	No	No	No
Amount	The amount authorized to pay (hours x rate) for the Service Month	Decimal	No	No	No

Note: If services were billed in multiple Billing Months/Periods for the same Service Month, multiple rows will display on this screen.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Homemaker Timesheets



When a user with a County Homemaker or Homemaker Supervisor security role logs on to CMIPS and selects the Homemaker actions from the expanded Shortcuts Panel, the Homemaker/PA Contract Timesheets list screen displays. This screen displays a list of service months for which the user has keyed timesheets. If the user has never added a service month this screen will be blank.

Figure – Homemaker/PA Contract Timesheets

Actions/Functions

The following actions are associated with the Homemaker/PA Contract Timesheets list screen:

Action	Function
New	Displays the Create Homemaker/PA Contract Timesheet screen allowing entry of Homemaker Timesheets.
View	Displays the View Homemaker/PA Contract Timesheets screen for the selected service month.

Data Elements

The following data elements are associated with the Homemaker/PA Contract Timesheet list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	Service Month, for which the user has entered Homemaker Timesheets, displays in MM/YYYY format.	Date	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Homemaker/PA Contract Timesheet

CI	Document Name
 CI-67686 - DSD SC Create Homemaker/PA Contract Timesheet IMPLEMENTED	DSD_SC_Create_Homemaker_PA_Contract_Timesheet.doc

When the New link is selected from the Homemaker/PA Contract Timesheet list screen, the Create Homemaker/PA Contract Timesheet pop-up displays. A Service Month and Year must be added in order to create Homemaker Timesheet entries specific to a Recipient case for that service month.

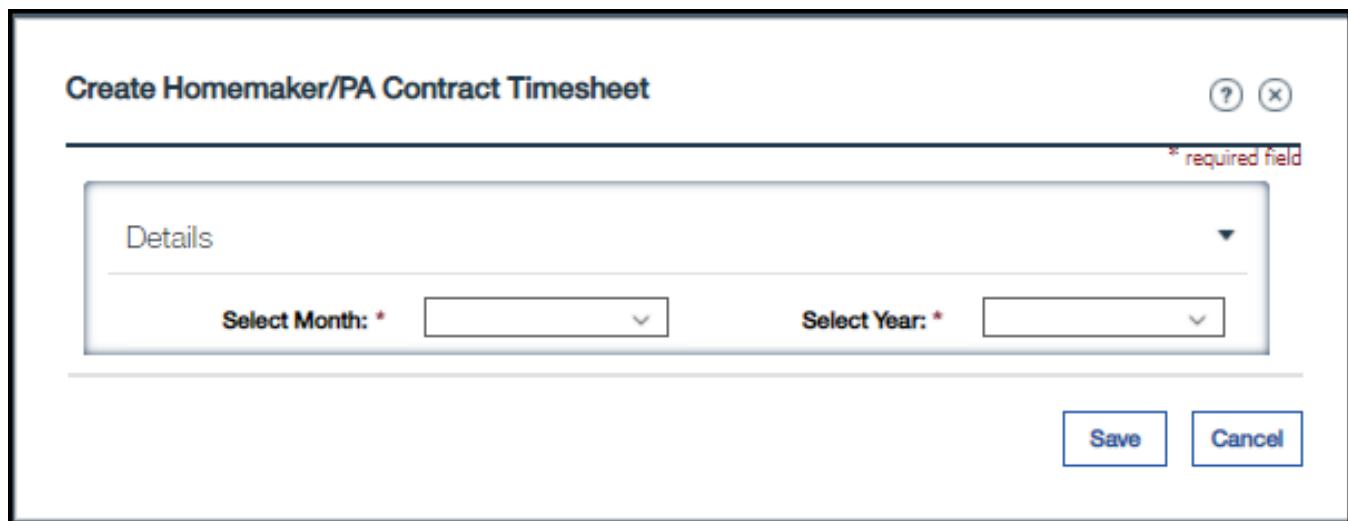


Figure – Create Homemaker/PA Contract Timesheet

Actions/Functions

The following actions are associated with the Create Homemaker/PA Contract Timesheet pop-up:

Action	Function
Cancel	Cancels the screen and displays the Homemaker/PA Contract Timesheet list screen.
Save	Saves the data and displays the View Homemaker/PA Contract Timesheet.

Data Elements

The following data elements are associated with the Create Homemaker/PA Contract Timesheet pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	The service month for which Homemaker/PA Contract timesheets are being processed.	Drop-down	Yes	No	Yes
Service Year	The year associated with the service month for which the Homemaker/PA Contract timesheets are being processed.	Drop-down	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Homemaker/PA Contract Timesheet

CI	Document Name
CI-67721 - DSD SC View Homemaker/PA Contract Timesheet IMPLEMENTED	DSD_SC_View_Homemaker_PA_Contract_Timesheet.doc

When the Save link is selected from the Create Homemaker/PA Contract Timesheet screen or when the View link associated with a specific service month is selected from the Homemaker/PA Contract Timesheet list screen the View Homemaker/PA Contract Timesheets pop-up displays. The Homemaker/PA Contract Timesheet Details section will be blank on a newly created View Homemaker/PA Contract Timesheet Service Month. As the Homemaker/PA Contract user assigns hours to Recipient cases, the list of cases will display.

Figure – View Homemaker/PA Contract Timesheet

Actions/Functions

The following actions are associated with the View Homemaker/PA Contract Timesheet pop-up:

Action	Function
Close	Closes the screen and returns the user to the Homemaker/PA Contract Timesheet list screen.
Submit for Approval	Displays the Submit for Approval Homemaker/PA Contract Timesheet Select list screen.
Details	
Case Number	Displays the Select Homemaker/PA Contract Case screen.
Save	Saves the entered data adding a row to the Homemaker/PA Contract Timesheet Detail section.
Homemaker/PA Contract Timesheet Details	
Inactivate	Displays the Inactivate Homemaker/PA Contract Timesheet confirmation screen.

Edit	Displays the Modify Homemaker/PA Contract Timesheet screen.
Comment	Displays the rejection comment from the Homemaker/PA Contract Supervisor when the timesheet Status is Rejected

Data Elements

The following data elements are associated with the View Homemaker/PA Contract Timesheet pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Service Month	Service Month displays in MM/YYYY format.	Date	No	Service Month	No
Case Number	Recipient case number	Number	Yes	No	Yes
Hours (HH:MM)	Number of hours worked for Recipient for Service Month, displays in HH:MM format.	Integer	Yes	No	Yes
Homemaker/PA Contract Timesheet Details					
Case Number	Recipient case number	Number	No	No	No
Service Month	Service Month (MM/YYYY) format	Date	No	No	No
Hours	Timesheet hours for the Recipient case for Service Month, displays in HH:MM format.	Integer	No	No	No
Status	Timesheet Status: <ul style="list-style-type: none">• Not Submitted• Submitted• Approved• Rejected	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Homemaker/PA Contract – Select Homemaker/PA Contract Case

CI	Document Name
CI-67677 - DSD SC Select Homemaker/PA Contract Case IMPLEMENTED	DSD_SC_Select_Homemaker_PA_Contract_Case.doc

When the Case Number search link is selected from the View Homemaker/PA Contract Timesheet pop-up, the Select Homemaker/PA Contract Case pop-up displays.

The screenshot shows a modal dialog titled "Select Homemaker/PA Contract Case:". The dialog contains a table with three columns: "Action", "Case Number", and "Recipient". The "Action" column lists multiple "Select" links. The "Case Number" and "Recipient" columns are blurred. A vertical scroll bar is visible on the right side of the table. At the bottom right of the dialog is a "Close" button.

Figure – Select Homemaker/PA Contract Case

Actions/Functions

The following actions are associated with the Select Homemaker/PA Contract Case pop-up:

Action	Function
Close	Closes the pop-up and displays the View Homemaker/PA Contract Timesheet pop-up.

Select	When selected, populates the associated case number to the Case Number field in the Details cluster on the View Homemaker/PA Contract Timesheet pop-up.
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Data Elements

The following data elements are associated with the Select Homemaker/PA Contract Case pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Case Number	Case Number	Integer	No	No	No
Recipient	Recipient Name	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Submit for Approval Homemaker/PA Contract Timesheet

CI	Document Name
 CI-67720 - DSD SC Submit for Approval Homemaker/PA Contract Timesheet IMPLEMENTED	DSD_SC_Submit_for_Approval_Homemaker_PA_Contract_Timesheet.doc

When the Submit for Approval link is selected on the View Homemaker/PA Contract Timesheet pop-up, the Submit for Approval Homemaker/PA Contract Timesheet pop-up displays with a list of the user's Homemaker/PA Contract Timesheets in Not Submitted status. The user may select all, using the select box in the header, or select individual timesheets to be submitted for supervisor approval.

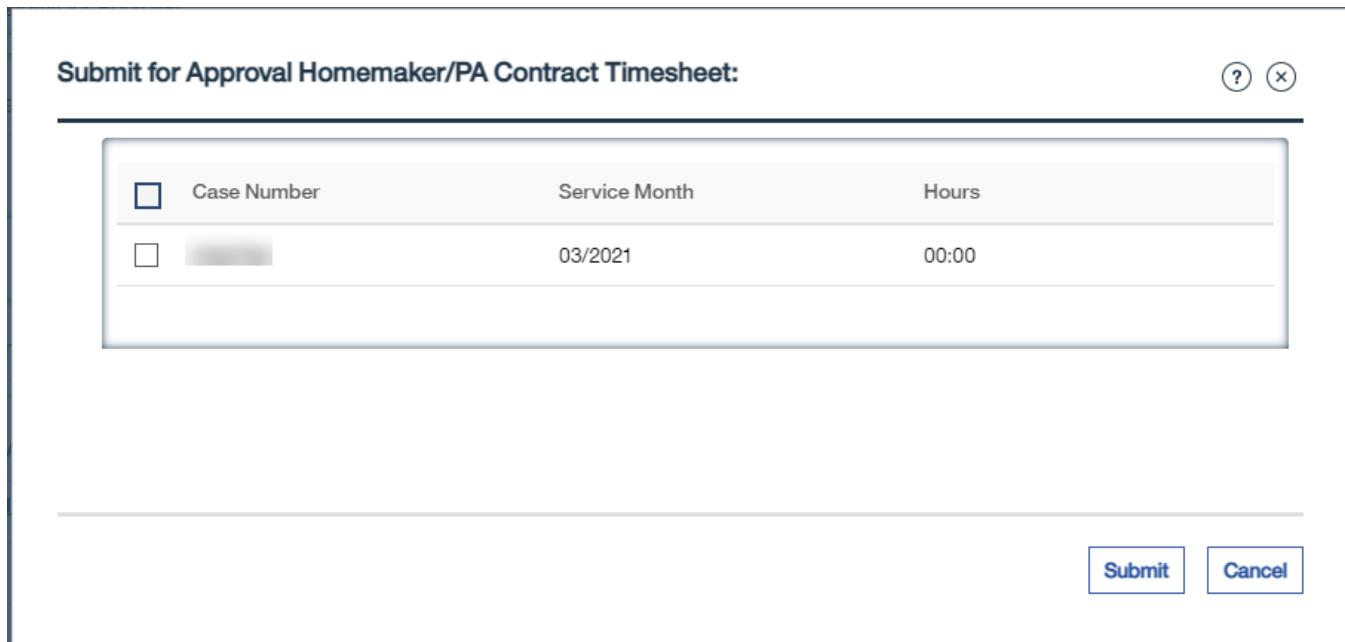


Figure – Submit for Approval – Homemaker/PA Contract Timesheet

Actions/Functions

The following actions are associated with the Submit for Approval Homemaker/PA Contract Timesheet pop-up:

Action	Function
Submit	Submits for Approval to the Homemaker/PA Contract Supervisor the selected timesheets.
Cancel	Cancels the screen and displays the View Homemaker/PA Contract Timesheet pop-up.

Data Elements

The following data elements are associated with the Submit for Approval Homemaker/PA Contract Timesheet pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Select	Allows the selection of all (Select in Title Bar) or individual timesheets for submission for approval to the Homemaker/PA Contract Supervisor	Checkbox	No	Unselected	Yes
Case Number	Recipient case number	Number	No	No	No

Service Month	Service Month displays in MM/YYYY format.	Date	No	No	No
Hours	Hours billed to Recipient case for Service Month, displays in HH:MM format.	Integer	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Homemaker/PA Contract Timesheet

CI	Document Name
CI-67700 - DSD SC Modify Homemaker/PA Contract IMPLEMENTED	DSD_SC_Modify_Homemaker_PA_Contract.doc

When the Edit link is selected for a specific timesheet from the View Homemaker/PA Contract Timesheet pop-up, the Modify Homemaker/PA Contract Timesheet pop-up displays.

Figure – Modify Homemaker/PA Contract Timesheet

Actions/Functions

The following actions are associated with the Modify Homemaker/PA Contract Timesheet pop-up:

Action	Function
Save	Saves the data and displays the View Homemaker/PA Contract Timesheet pop-up.
Cancel	Cancels the screen and displays the View Homemaker/PA Contract Timesheet pop-up.

Data Elements

The following data elements are associated with the Modify Homemaker/PA Contract Timesheet pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Case Number	Recipient case number	Number	No	Case Number	No
Service Month	Service Month displays in MM/YYYY format.	Date	No	Service Month	No
Hours (HH:MM)	Timesheet hours associated to the Recipient case for Service Month, displays in HH:MM format.	Integer	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Homemaker/PA Contract Supervisor – Inactivate Homemaker/PA Contract Timesheet

CI	Document Name
CI-67676 - DSD SC Homemaker/PA Contract Supervisor Inactivate Homemaker/PA Contract Timesheet IMPLEMENTED	DSD_SC_Homemaker_PA_Contract_Supervisor_Inactivate_Homemaker_PA_Contract_Timesheet.doc

When the Inactivate link is selected from the View Homemaker/PA Contract Timesheet pop-up for a specific Recipient record, the Inactivate Homemaker/PA Contract Timesheet confirmation pop-up displays.

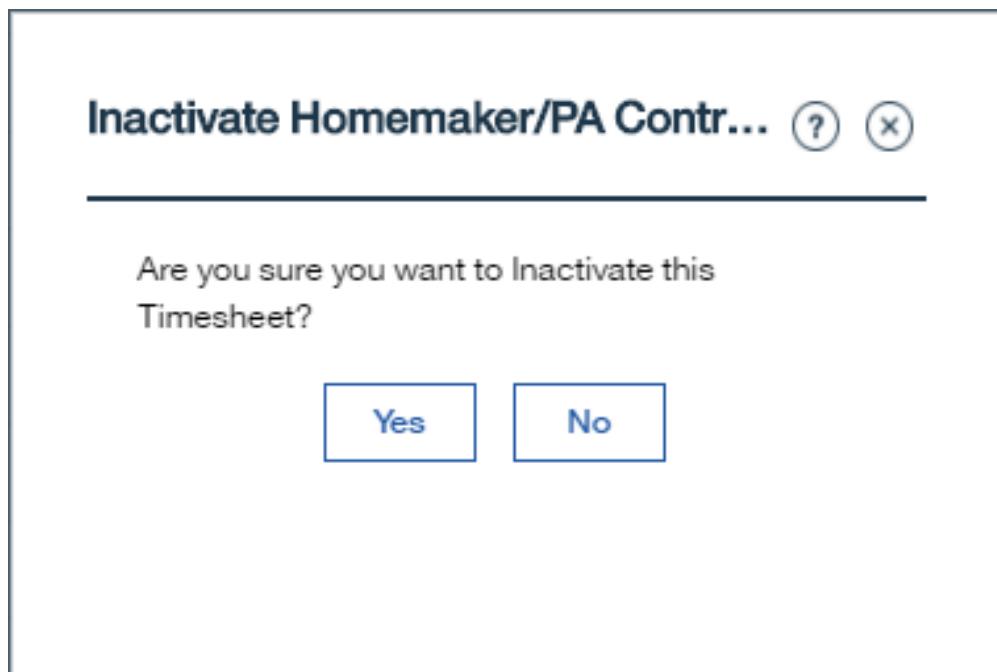


Figure – Inactivate Homemaker/PA Contract Timesheet

Actions/Functions

The following actions are associated with the Inactivate Homemaker/PA Contract Timesheet pop-up:

Action	Function
Yes	Inactivates the selected Timesheet and displays the View Homemaker/PA Contract Timesheet pop-up. Inactivated Timesheets will not display on the View Homemaker/PA Contract Timesheet pop-up.
No	Cancels the Inactivate action and returns to the View Homemaker/PA Contract Timesheet pop-up.

Data Elements

The there are no data elements are associated with the Inactivate Homemaker/PA Contract Timesheet pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Homemaker/PA Contract Supervisor – Ready for Review

CI	Document Name
 CI-116580 - DSD SC Homemaker/PA Contract Supervisor Ready For Review IMPLEMENTED	DSD_SC_Homemaker_PA_Contract_Supervisor_Ready_for_Review.doc

When the Ready for Review link is selected from the Homemaker/PA Contract menu by a Homemaker/PA Contract Supervisor, the Homemaker/PA Contract Supervisor Ready for Review screen displays.

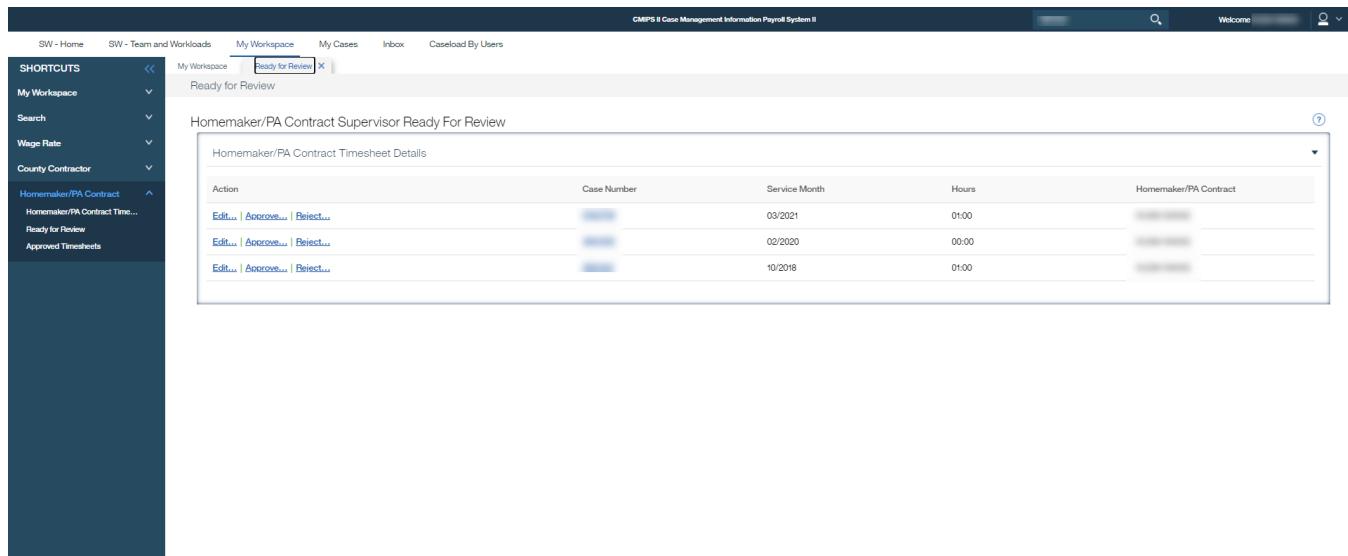


Figure – Homemaker/PA Contract Supervisor Ready for Review

Actions/Functions

The following actions are associated with the Homemaker/PA Contract Supervisor Ready for Review screen:

Action	Function
Edit	Displays the Modify Homemaker/PA Contract Timesheet pop-up
Approve	Displays the Approve Timesheet confirmation pop-up
Reject	Displays the Reject Homemaker/PA Contract Timesheet pop-up
Case Number	Displays the Case Home for the associated entry.

Data Elements

The following data elements are associated with the Homemaker/PA Contract Supervisor Ready for Review screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	Service Month displays in MM/YYYY format.	Date	No	Service Month	No
Hours(HH:MM)	Timesheet hours associated to the Recipient case for Service Month, displays in HH:MM format.	Integer	No	No	No

Homemaker/PA Contract	Name of the Homemaker/PA Contract associated with the Timesheet	String	No	No	No
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DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Reject Homemaker/PA Contract Timesheet

CI	Document Name
CI-67697 - DSD SC Reject Homemaker/PA Contract Timesheet IMPLEMENTED	DSD_SC_Reject_Homemaker_PA_Contract_Timesheet.doc

When the Reject link is selected by the Homemaker/PA Contract Supervisor from the Homemaker/PA Contract Supervisor Ready for Review screen, the Reject Homemaker/PA Contract Timesheet pop-up displays. This allows the user to enter comments associated with the Timesheet Rejection.

The screenshot shows a modal dialog box titled "Reject Homemaker/PA Contract Timesheet". At the top right are a help icon (question mark) and a close/cancel icon (X). Below the title, a red asterisk indicates a required field. A text input area is labeled "Rejection Comments: *". At the bottom right of the dialog are "Save" and "Cancel" buttons.

Figure – Reject Homemaker/PA Contract Timesheet

Actions/Functions

The following actions are associated with the Reject Homemaker/PA Contract Timesheet pop-up:

Action	Function
Save	Processes the rejection changing the timesheet Status to Rejected.
Cancel	Cancels the screen and displays the View Homemaker Timesheet pop-up.

Data Elements

The following data elements are associated with the Reject Homemaker/PA Contract Timesheet pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Rejection Comments	Rejection comments (200 Characters)	String	Yes	N/A	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Reject Homemaker/PA Contract Timesheet Comment

CI	Document Name
 CI-116583 - DSD SC Reject Homemaker/PA Contract Timesheet Comment IMPLEMENTED	DSD_SC_Reject_Homemaker_PA_Contract_Timesheet_Comment.doc

When the Comment link associated with a Timesheet in Rejected Status is selected, the Reject Homemaker/PA Contract Timesheet Comment pop-up displays.

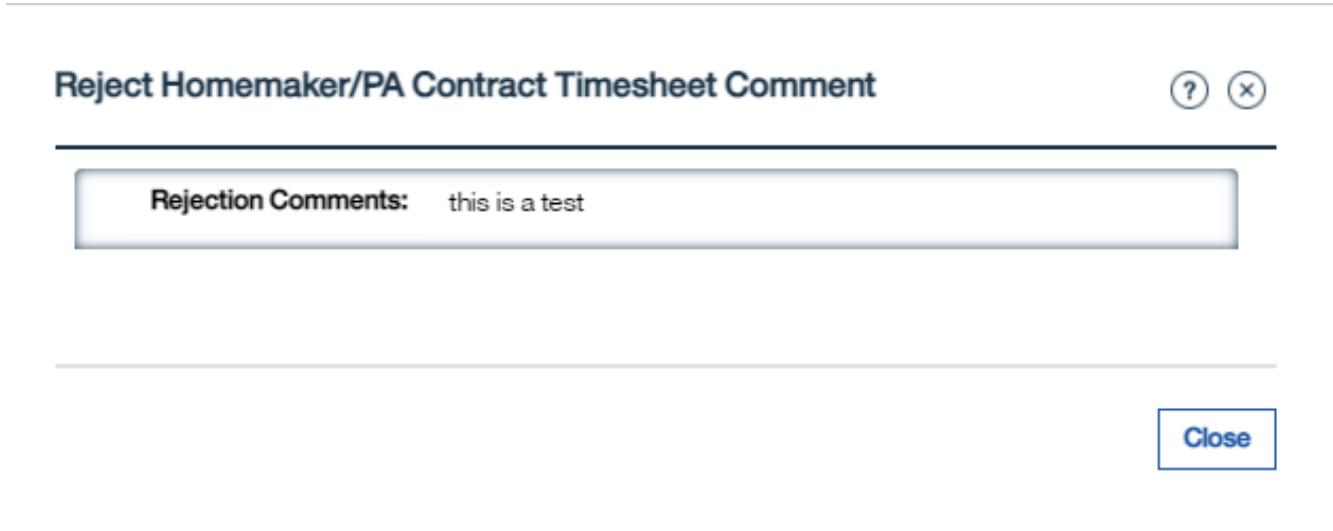


Figure – Reject Homemaker/PA Timesheet Comment

Actions/Functions

The following actions are associated with the Reject Homemaker/PA Contract Timesheet Comment pop-up:

Action	Function
Close	Closes the screen and displays the View Homemaker/PA Contract Timesheet pop-up.

Data Elements

The following data elements are associated with the Reject Homemaker/PA Contract Timesheet Comment pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Rejection Comments	Rejection comments (200 Characters)	String	No	N/A	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Approve Homemaker/PA Contract Timesheet

CI	Document Name
CI-116569 - DSD SC Approve Homemaker/PA Contract Timesheet IMPLEMENTED	DSD_SC_Approve_Homemaker_PA_Contract_Timesheet.doc

When the Approve link is selected by the Homemaker/PA Contract Supervisor from the Homemaker/PA Contract Supervisor Ready for Review screen, the Approve Homemaker/PA Contract Timesheet confirmation pop-up displays.



Figure – Approve Homemaker/PA Contract Timesheet

Actions/Functions

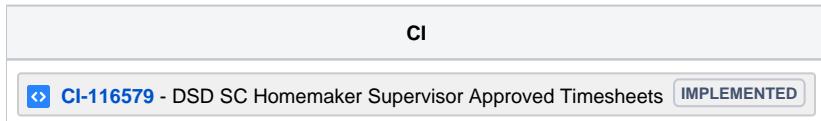
The following hyperlink functionality will be associated with the Approve Homemaker/PA Contract Timesheet pop-up:

Action	Function
Yes	Completes the Approve Homemaker/PA Contract Timesheet process attributing the Homemaker/PA Contract Hours to the Recipient case. Selecting the Yes action takes the user back to the Homemaker/PA Contract Supervisor Ready For Review screen.
No	Cancels the action and displays the Homemaker/PA Contract Supervisor Ready For Review screen.

Data Elements

There are no data elements on the Approve Homemaker/PA Contract Timesheet pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Homemaker/PA Contract Supervisor Approved Timesheets



When the Approved Timesheets link is selected from the Homemaker/PA Contract menu by a Homemaker/PA Contract Supervisor, the Homemaker Supervisor Approved Timesheets list screen displays.

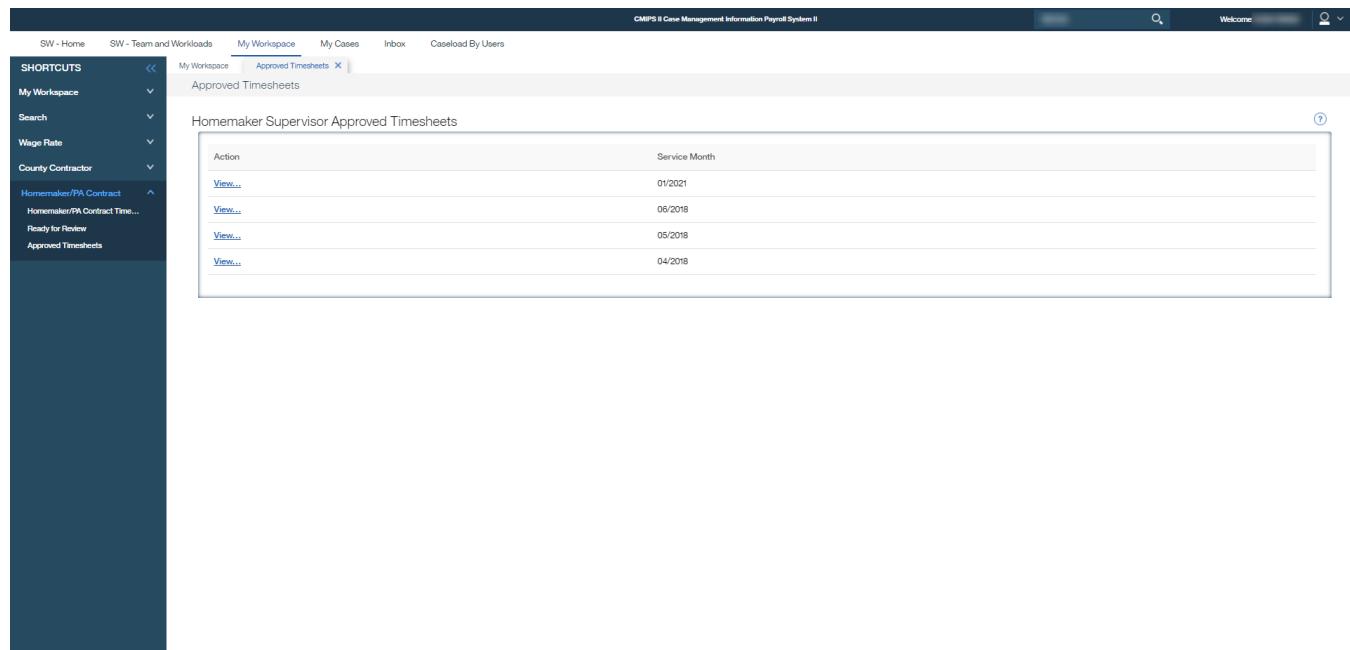


Figure – Homemaker Supervisor Approved Timesheets

Actions/Functions

The following actions are associated with the Homemaker Supervisor Approved Timesheets screen:

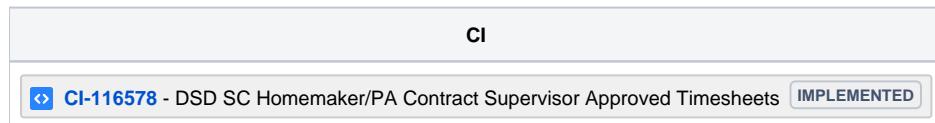
Action	Function
View	Displays the Homemaker/PA Contract Supervisor Approved Timesheets list pop-up.

Data Elements

The following data elements are associated with the Homemaker Supervisor Approved Timesheets screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	The service month for which hours were approved by the Supervisor	Date (MM/YYYY)	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Homemaker/PA Contract Supervisor Approved Timesheets List



When the View link associated with a specific Service Month is selected on the Homemaker Supervisor Approved Timesheet screen, the Homemaker/PA Contract Supervisor Approved Timesheets list pop-up displays a list of all the timesheet for the associated Service Month approved by the Supervisor.

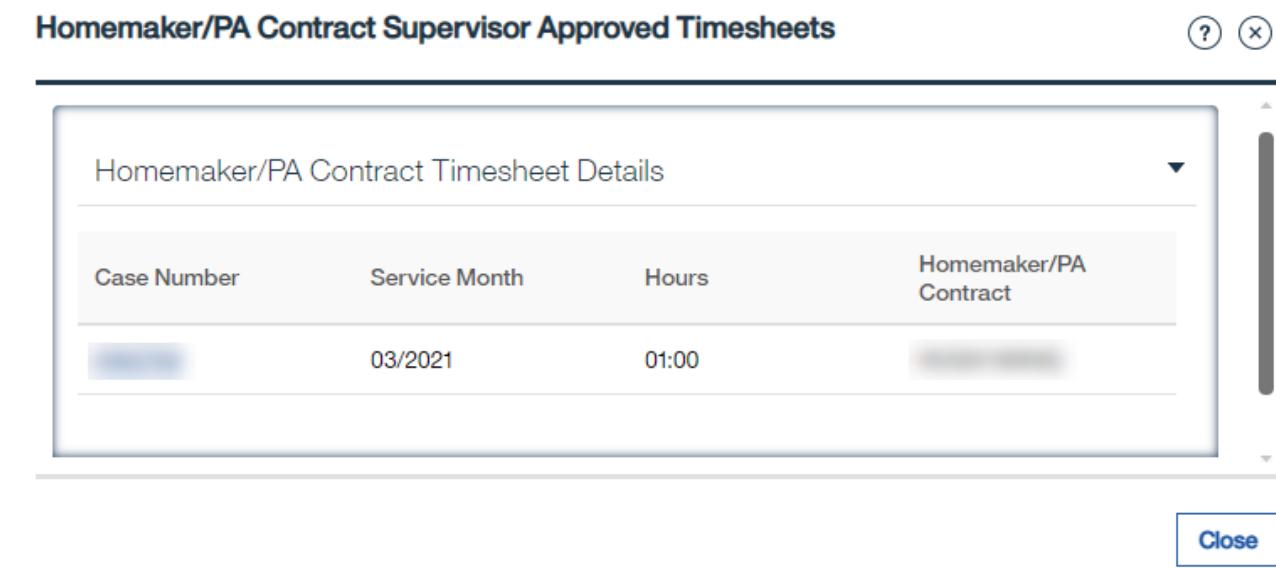


Figure – Homemaker/PA Contract Supervisor Approved Timesheets

Actions/Functions

The following actions are associated with the Homemaker/PA Contract Supervisor Approved Timesheets list pop-up:

Action	Function
Case Number	Displays the Case Home screen for the listed record
Close	Closes the screen and displays the Homemaker Supervisor Approved Timesheets screen

Data Elements

The following data elements are associated with the Homemaker/PA Contract Supervisor Approved Timesheets list pop-up:

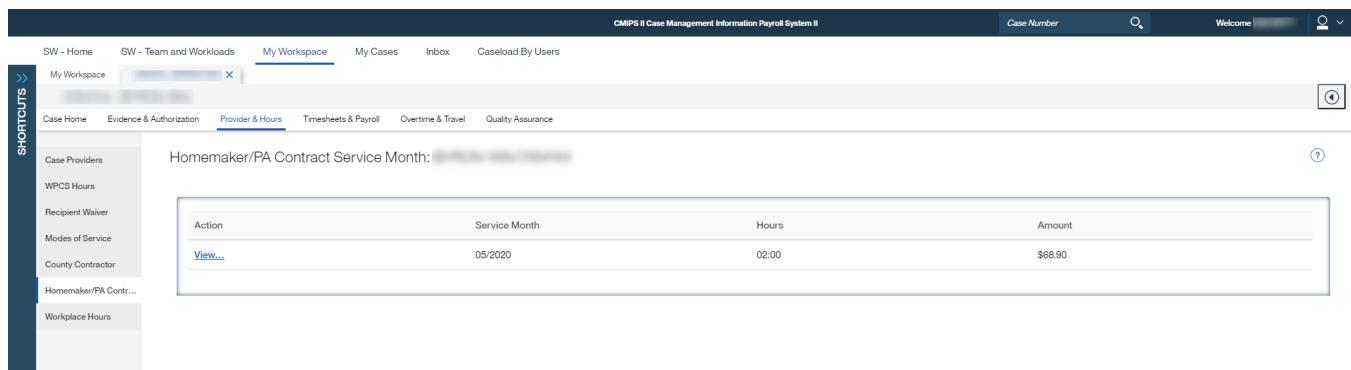
Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	The service month for which hours were approved for the Recipient case	Date (MM /YYYY)	No	No	No
Hours	The hours approved for the Recipient case for the homemaker/PA Contract for the service month	Integer (HH:MM)	No	No	No

Homemaker/PA Contract	The name of the Homemaker/PA Contract who submitted time for the Recipient case	String	No	No	No
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DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Case – Homemaker/PA Contract Service Month

CI	Document Name
 CI-67724 - DSD SC Recipient Case Homemaker/PA Contract Service Month IMPLEMENTED	DSD_SC_Recipient_Case_Homemaker_PA_Contract_Service_Month.doc

When the Homemaker/PA Contract Page Navigation is selected from the Provider & Hours Content Tab, the Homemaker/PA Contract Service Month list screen displays. When a Recipient case, assigned Homemaker Mode of Service hours, has had Homemaker/PA Contract Timesheets processed and approved for a service month a record for that service month displays.



The screenshot shows the CMIPS II Case Management Information Payroll System II interface. The top navigation bar includes links for SW - Home, SW - Team and Workloads, My Workspace (which is selected), My Cases, Inbox, and Caseload By Users. Below the navigation is a search bar with 'Case Number' and a magnifying glass icon, along with 'Welcome' and a user profile icon. On the left, there's a sidebar titled 'Shortcuts' with links to Case Home, Evidence & Authorization, Provider & Hours (which is selected and highlighted in blue), Timesheets & Payroll, Overtime & Travel, and Quality Assurance. Under 'Provider & Hours', there are links for Case Providers, WPCS Hours, Recipient Waiver, Modes of Service, County Contractor, Homemaker/PA Contr..., and Workplace Hours. The main content area displays a table titled 'Homemaker/PA Contract Service Month: [REDACTED]'. The table has columns for Action, Service Month, Hours, and Amount. One row is visible: 'View...' under Action, '05/2020' under Service Month, '02:00' under Hours, and '\$68.90' under Amount. A question mark icon is located at the top right of the table.

Figure – Homemaker/PA Contract Service Month

Actions/Functions

The following actions are associated with the Homemaker/PA Contract Service Month list screen:

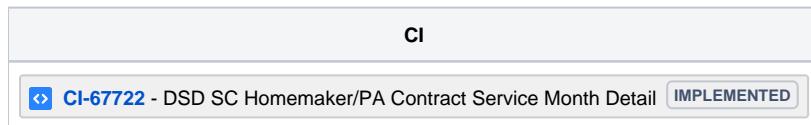
Action	Function
<<Previous	Displays the previous 50 Service Month records. This hyperlink is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of Service Month records (up to 50). This hyperlink is only displayed when there are additional records to be displayed.
View	Displays Homemaker/PA Contract Service Month Details pop-up.

Data Elements

The following data elements are associated with the Homemaker/PA Contract Service Month list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	The service month for which Homemaker timesheets were processed against the Recipient case, displays in MM/YYYY format.	Date	No	No	No
Hours	The aggregated Homemaker hours associated to the Recipient case for the service month, displays in HH:MM format.	Integer	No	No	No
Amount	The aggregated amount associated with the Homemaker hours (Hours x Rate) associated with the Recipient case for the service month.	Decimal	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Case – Homemaker/PA Contract Service Month Details



When the View link is selected from the View Homemaker/PA Contract Service Month list screen, the Homemaker/PA Contract Service Month Detail pop-up displays.

A screenshot of a software interface showing a pop-up window titled "View Homemaker/PA Contract Service Month Detail". The window contains a table with one row of data. The columns are labeled "Service Month", "Homemaker/PA Contract", "Hours", and "Amount". The data row shows "05/2020", a blurred contract name, "02:00", and "\$68.90". There are buttons for "Close" and "X" at the bottom right.

Figure – Homemaker/PA Contract Service Month Detail

Actions/Functions

The following actions are associated with the View Homemaker/PA Contract Service Month Detail pop-up:

Action	Function
Close	Close the current screen and displays the Homemaker/PA Contract Service Month list screen.

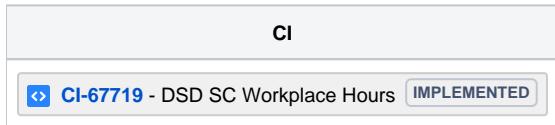
Data Elements

The following data elements are associated with the View Homemaker/PA Contract Service Month Detail pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Service Month	The service month for Homemaker/PA Contract timesheets were processed against the Recipient case, displays in MM/YYYY format.	Date	No	No	No
Homemaker/PA Contract	The Homemaker/PA Contract who worked the associated hours.	String	No	No	No

Hours	The Homemaker/PA Contract hours associated to the Recipient case for the service month, displays in HH:MM format.	Integer	No	No	No
Amount	The amount associated with the Homemaker/PA Contract hours associated with the Recipient case for the service month.	Decimal	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Workplace Hours List



When the Workplace Navigation Page Tab is selected from the Provider & Hours Content Tab, the Workplace Hours list screen displays.

Figure – Workplace Hours

Actions/Functions

The following actions are associated with the Workplace Hours list screen:

Action	Function
New	Displays the Create Workplace Hours pop-up
View	Displays the View Workplace Hours screen
Edit	Displays the Modify Workplace Hours pop-up

Data Elements

The following data elements are associated with the Workplace Hours list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Workplace Hours	Number of Hours Recipient indicates will be provided in the Workplace, displays in HH:MM format.	Integer	No	No	No
Start Date	The Start Date associated with the indicated Workplace Hours. Displays in MM/DD /YYYY format.	Date	No	No	No
End Date	The End Date associated with the indicated Workplace Hours. Displays in MM/DD /YYYY format.	Date	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Workplace Hours

CI	Document Name
CI-67678 - DSD SC Create Workplace Hours IMPLEMENTED	DSD_SC_Create_Workplace_Hours.doc

When the New link is selected from the Workplace Hours list screen, the Create Workplace Hour pop-up displays. The End Date will remain blank unless the Workplace Hours assignment is changed or ended.

Figure – Create Workplace Hours

Actions/Functions

The following actions are associated with the Create Workplace Hours pop-up:

Action	Function
Save	Saves entered data and returns the user to the Workplace Hours list screen.
Cancel	Cancels the action and returns the user to the Workplace Hours list screen.

Data Elements

The following data elements are associated with the Create Workplace Hours pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Workplace Hours (HH:MM)	Number of Hours Recipient indicates will be provided in the Workplace, displays in HH:MM format.	Integer	Yes	No	Yes
Start Date	The Start Date associated with the indicated Workplace Hours. Displays in MM /DD/YYYY format.	Date	Yes	No	Yes
End Date	The End Date associated with the indicated Workplace Hours. Displays in MM /DD/YYYY format.	Date	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Workplace Hours

CI	Document Name
CI-67699 - DSD SC View Workplace Hours IMPLEMENTED	DSD_SC_View_Workplace_Hours.doc

When the View link is selected from the Workplace Hours list screen, the View Workplace Hours screen displays.

Figure – View Workplace Hours

Actions/Functions

The following actions are associated with the View Workplace Hours screen:

Action	Function
Edit	Displays the Modify Workplace Hours pop-up
Close	Close the pop-up and displays the Workplace Hours list screen.

Data Elements

The following data elements are associated with the View Workplace Hours screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Workplace Hours (HH:MM)	Number of Hours Recipient indicates will be provided in the Workplace, displays in HH:MM format.	Integer	No	No	No
Start Date	The Start Date associated with the indicated Workplace Hours. Displays in MM /DD/YYYY format.	Date	No	No	No
End Date	The End Date associated with the indicated Workplace Hours. Displays in MM /DD/YYYY format.	Date	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Workplace Hours

CI	Document Name
CI-67681 - DSD SC Modify Workplace Hours IMPLEMENTED	DSD_SC_Modify_Workplace_Hours.doc

When the Edit link is selected from the Workplace Hours list screen or the View Workplace Hours screen, the Modify Workplace Hours pop-up displays.

The screenshot shows a modal dialog titled "Modify Workplace Hours: [REDACTED]". Inside, there's a "Details" section with a dropdown menu. Under "Workplace Hours", the value "02 : 00" is entered. Next to it are "Start Date: * 12/01/2020" and "End Date: [empty]". A red asterisk indicates these are required fields. At the bottom are "Save" and "Cancel" buttons.

Figure – Modify Workplace Hours

Actions/Functions

The following actions are associated with the Modify Workplace Hours pop-up:

Action	Function
Save	Saves data entered and returns the user to the Workplace Hours list screen.
Cancel	Cancels the action and returns the user to the Workplace Hours list screen.

Data Elements

The following data elements are associated with the Modify Workplace Hours pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Workplace Hours (HH:MM)	Number of Hours Recipient indicates will be provided in the Workplace, displays in HH:MM format.	Integer	Yes	No	Yes
Start Date	The Start Date associated with the indicated Workplace Hours. Displays in MM /DD/YYYY format.	Date	Yes	No	Yes
End Date	The End Date associated with the indicated Workplace Hours. Displays in MM /DD/YYYY format.	Date	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/State Hearing List

CI	Document Name
CI-67705 - DSD SC State Hearing list IMPLEMENTED	DSD_SC_State_Hearing_list.doc

When the State Hearing Page Navigation is selected from the Case Content Tab the State Hearings list screen displays. The records on the State Hearings list screen are displayed in descending order by Requested Date.

Figure – State Hearings

Actions/Functions

The following actions are associated with the State Hearings list screen:

Action	Function
New	Displays the Create State Hearing pop-up
View	Displays the View State Hearing screen
Edit	Displays the Modify State Hearing pop-up

Data Elements

The following data elements are associated with the State Hearings list screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Requested Date	State Hearing requested date. Displays in MM/DD/YYYY format.	Date	No	No	No
Scheduled Hearing Date	Scheduled hearing date. Displays in MM/DD/YYYY format.	Date	No	No	No
Outcome	The Outcome of the State Hearing	String	No	No	No
Status	The Status of the State Hearing	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create State Hearing

CI	Document Name
CI-67680 - DSD SC Create State Hearing IMPLEMENTED	DSD_SC_Create_State_Hearing.doc

When the New link is selected from the State Hearings list screen, the Create State Hearing pop-up displays.

Figure – Create State Hearing

Actions/Functions

The following actions are associated with the Create State Hearing pop-up:

Action	Function
Save	Saves the data and displays the State Hearings list screen.
Cancel	Closes the screen and displays the State Hearings list screen.

Data Elements

The following data elements are associated with the Create State Hearing pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
State Hearing Request					
Number	State Hearing Number	String	Yes	No	Yes
Request Date	State Hearing Requested Date. Displays in MM/DD/YYYY format.	Date	Yes	Current Date	Yes
Details					

Scheduled Hearing Date	Scheduled Hearing Date. Displays in MM/DD/YYYY format.	Date	No	No	Yes
Rescheduled Reason	Comment/Reasons associated with the rescheduled State Hearing	Drop down list	No	No	Yes
Outcome	Scheduled Hearing Outcome	Drop down list	No	No	Yes
Outcome Date	Scheduled Hearing outcome date. Displays in MM/DD/YYYY format.	Date	No	No	Yes
Compliance Form Sent Date	Compliance form sent date. Displays in MM/DD/YYYY format.	Date	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View State Hearing

CI	Document Name
CI-67689 - DSD SC View State Hearing IMPLEMENTED	DSD_SC_View_State_Hearing.doc

When the View link is selected from the State Hearing list screen, the View State Hearing screen displays.

The screenshot shows the CMIPS II Case Management Information Payroll System II interface. The main title bar reads "CMIPS II Case Management Information Payroll System II". The top navigation bar includes links for "Case Number", "Welcome", and a search icon. Below the navigation is a breadcrumb trail: "SW - Home" → "My Workspace" → "Case Home" → "View State Hearing: [redacted]". On the left, a vertical sidebar titled "SHORTCUTS" lists various links: "Case Home", "Evidence & Authorization", "Provider & Hours", "Timesheets & Payroll", "Overtime & Travel", "Quality Assurance", "Medi-Cal Eligibility", "Contacts", "Blind or Visually Impai...", "Forms/Correspondence", "Tasks", "Notes", "Inter-County Transfers", "State Hearings" (which is currently selected), "Status History", and "User Roles". The main content area is titled "View State Hearing: [redacted]" and contains a form with fields: "Number: 1234", "Request Date: 10/01/2020", "Scheduled Hearing Date: 10/05/2020", "Outcome: Pending", "Rescheduled Reason: [redacted]", "Outcome Date: [redacted]", "Compliance Form Sent Date: [redacted]", "Status: Scheduled". Below this is a section titled "Previous Scheduled Hearings" with a table showing a single entry: "Date: 10/05/2020" and "Rescheduled Reason: [redacted]". At the bottom right of the form are "Edit..." and "Close" buttons.

Figure – View State Hearing

Actions/Functions

The following actions are associated with the View State Hearing screen:

Action	Function
Edit	Displays the Modify State Hearing pop-up
Close	Closes the current screen and displays the State Hearing list screen

Data Elements

The following data elements are associated with the View State Hearing screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
State Hearing Request					
Number	The number associated with the State Hearing	Number	No	No	No
Request Date	State Hearing requested Date. Displays in MM/DD/YYYY format.	Date	No	No	No
Details					
Scheduled Hearing Date	State Hearing Date. Displays in MM/DD/YYYY format.	Date	No	No	No
Rescheduled Reason	Comment/Reasons associated with the rescheduled State Hearing.	String	No	No	No
Outcome	Scheduled Hearing Outcome	String	No	No	No
Outcome Date	Scheduled Hearing outcome date. Displays in MM/DD/YYYY format.	Date	No	No	No

Compliance Form Sent Date	Compliance form sent date. Displays in MM/DD/YYYY format.	Date	No	No	No
Status	State Hearing status	String	No	No	No
Previously Scheduled Hearings					
Date	Previously scheduled State Hearing Date which was changed. Displays in MM /DD/YYYY format.	Date	No	No	No
Rescheduled Reason	Reason State Hearing was rescheduled	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify State Hearing

CI	Document Name
CI-67695 - DSD SC Modify State Hearing IMPLEMENTED	DSD_SC_Modify_State_Hearing.doc

When the Edit link is selected from the State Hearing list or the View State Hearing screen, the Modify State Hearing pop-up displays.

Modify State Hearing: [REDACTED] (?) (X)

* required field

State Hearing Request

Number: 1234 Request Date: 10/01/2020

Details

Scheduled Hearing Date: 10/05/2020 Rescheduled Reason: Outcome: Pending Outcome Date: Compliance Form Sent Date: Status: Scheduled

Save Cancel

Figure – Modify State Hearing

Actions/Functions

The following actions are associated with the Modify State Hearing pop-up:

Action	Function
Save	Saves data and displays the State Hearing list screen
Cancel	Cancels the Modify action and displays the originating screen

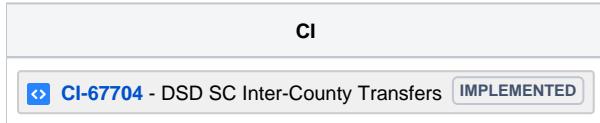
Data Elements

The following data elements are associated with the Modify State Hearing pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
State Hearing Request					
Number	The number associated with the State Hearing	Number	No	No	No
Request Date	State Hearing requested Date. Displays in MM/DD/YYYY format.	Date	No	No	No
Details					

Scheduled Hearing Date	State Hearing Date. Displays in MM/DD/YYYY format.	Date	No	No	Yes
Rescheduled Reason	Reasons associated with the Rescheduled State Hearing. (For Values see Code table section).	Drop down list	No	No	Yes
Outcome	Scheduled Hearing Outcome (For Values see Code table section).	Drop down list	No	No	Yes
Outcome Date	Scheduled Hearing outcome date. Displays in MM/DD/YYYY format.	Date	No	No	Yes
Compliance Form Sent Date	The date the county worker sent the Compliance Form associated with the State Hearing Outcome. Displays in MM/DD/YYYY format.	Date	No	No	Yes
Status	The Status of the State Hearing	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inter-County Transfer List



When the Inter-County Transfers Navigation Page Tab is selected from the Case Home Content Tab, the Inter-County Transfers list screen displays.

A screenshot of a software interface showing the "Inter-County Transfers" list screen. At the top, there is a header with tabs and a search bar. Below the header is a table with three columns: "Address", "Date Of Move", and "Status". The table contains two rows of data. The first row has an address of "123 Main Street", a move date of "12/01/2020", and a status of "In-Progress". The second row has an address of "456 Elm Street", a move date of "01/01/2021", and a status of "Cancelled". There are also "New", "View", and "Edit" buttons above the table.

Figure – Inter-County Transfers

Actions/Functions

The following actions are associated with the Inter-County Transfers list screen:

Action	Function
New	Displays the Create Inter-County Transfer pop-up
View	Displays the View Inter-County Transfer screen
Edit	Displays the Modify Inter-County Transfer pop-up

Data Elements

The following data elements are associated with the Inter-County Transfers list screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Receiving County	Name of county where Recipient intends to move.	String	No	No	No
New Address	The Recipient new address in the Recipient Receiving County.	String	No	No	No
Date Of Move	Recipient intended move date. Displays in MM/DD/YYYY format.	Date	No	No	No
Status	Recipient transferred status	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Inter-County Transfer

When the New link is selected from the Inter-County Transfers list screen, the Create Inter-County Transfer pop-up displays.

Figure – Create Inter-County Transfer

Actions/Functions

The following actions are associated with the Create Inter-County Transfer pop-up:

Action	Function
Save	Saves data entered and displays the Inter-County Transfers list screen.
Cancel	Cancels the screen and displays the Inter-County Transfers list screen.
New Address	Displays appropriate Maintain Address screen which allows address validation and standardization service verification of the address associated with the Recipient's new residence in the receiving County.

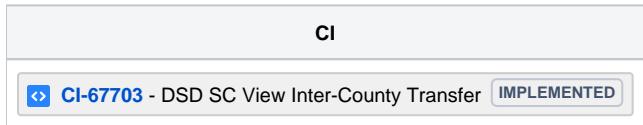
Data Elements

The following data elements are associated with the Create Inter-County Transfer pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Details					
Sending County	The county which currently owns the Recipient case	String	No	Current County to which the case is assigned	No
Sending County Notified	The date the Sending County was notified of the intended move. Displays in MM/DD/YYYY format.	Date	Yes	Current Date	Yes

Receiving County	The county to which the Recipient intends to move (For Values see Code table section).	Drop down list	Yes	No	Yes
Date Of Move	Recipient intended date of move. Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
New Phone Number	Recipient new phone number in the Receiving County	Number	No	No	Yes
Extension	Phone number extension	Number	No	No	Yes
Residence Address					
New Address	The Recipient's new residence address in the Receiving County	Drop-down	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Inter-County Transfer



When the View link is selected for a specific Inter-County Transfer from the Inter-County Transfers list screen, the View Inter-County Transfer screen displays.

The screenshot shows the CMIPS II interface with the 'My Workspace' tab selected. The main content area displays the 'View Inter-County Transfer' screen. On the left, there is a sidebar titled 'SHORTCUTS' with various links. The main content area shows details for an inter-county transfer between Los Angeles and Orange counties, with fields for sending/receiving county, date of move, assigned worker, and status.

Figure – View Inter-County Transfer

Actions/Functions

The following actions are associated with the View Inter-County Transfer screen:

Action	Function
Edit	Displays the Modify Inter-County Transfer pop-up
Cancel Transfer Request	Displays the Cancel Transfer Request confirmation pop-up. This action is only available to users in the Sending County. Users in the Receiving County may not cancel an Inter-County Transfer.
Close	Closes the screen and displays the Inter-County Transfer list screen

Data Elements

The following data elements are associated with the View Inter-County Transfer screen:

Field Name	Description	Type	Required Indicator	Default Value	Editable Field
Details					
Sending County	The county from where the Recipient currently lives.	String	No	No	No
Sending County Notified	The date the Sending County was notified of the intended move.	Date	No	No	No
Receiving County	The county where the Recipient intends to move.	String	No	No	No
Receiving County Notified	System generated date the Receiving county was notified of the intended move. Displays in MM/DD /YYYY format.	Date	No	No	No
New Phone Number	Recipient new phone number in the Receiving County. Displays in [Area Code] [Phone Number]	Number	No	No	No

Extension	The extension associated with the indicated phone number	Number	No	No	No
Date Of Move	Recipients intended date of move. Displays in MM/DD/YYYY format.	Date	No	No	No
Status	System generated status of the Inter-County Transfer.	String	No	No	No
Assigned Worker	Assigned Social Worker in the Receiving County.	String	No	No	No
Authorization Start Date	The Authorization Start Date associated with the Inter-County Transfer Assessment. Displays in MM/DD/YYYY format.	Date	No	No	No
Transfer Date	System generated date the Case was authorized in the Receiving County which changes the case ownership. Displays in MM/DD/YYYY format.	Date	No	No	No
Cancel Date	System generated date the Inter-County Transfer was cancelled. Displays in MM/DD/YYYY format.	Date	No	No	No
New Address					
New Address	Recipient new residence address in the Receiving County.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Cancel Transfer Request

CI	Document Name
 CI-67673 - DSD SC Cancel Transfer Request IMPLEMENTED	DSD_SC_Cancel_Transfer_Request.doc

When the Cancel Transfer Request link is selected from the View Inter-County Transfer screen, the Cancel Transfer Request confirmation pop-up displays.

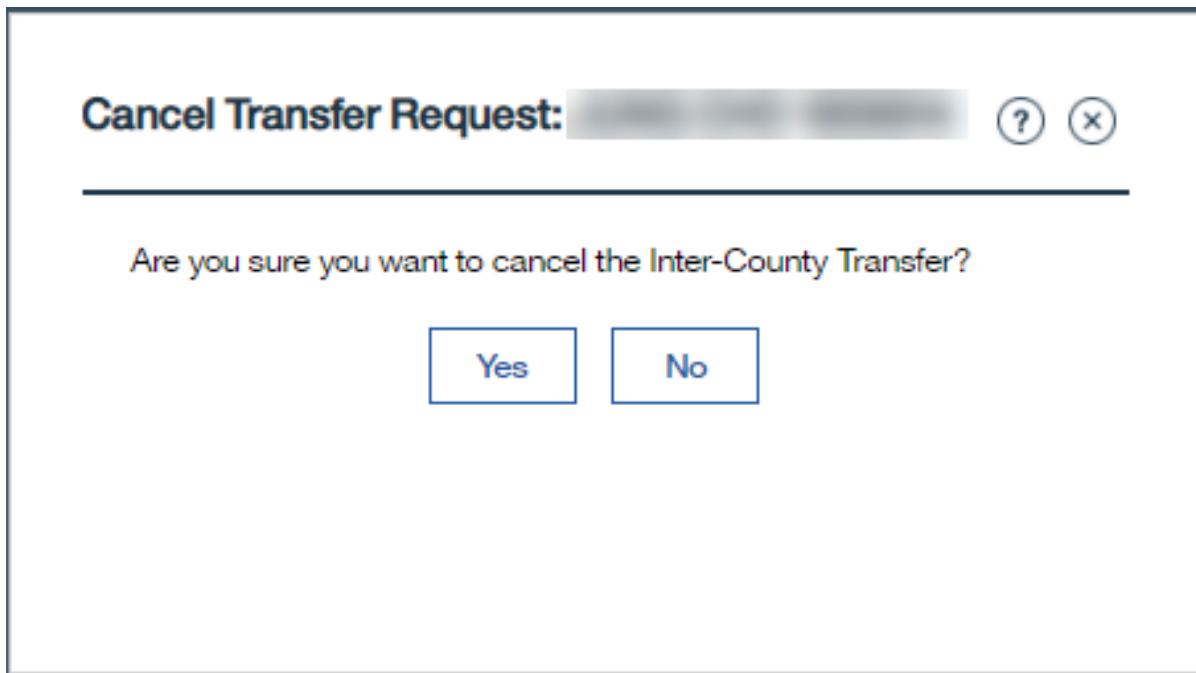


Figure – Cancel Transfer Request

Actions/Functions

The following actions are associated with the Cancel Transfer Request pop-up:

Action	Function
Yes	Closes the Cancel Transfer Request Pop-up, cancels the Inter-County Transfer, changes the Inter-County Transfer status to Cancelled, populates the Cancel Date field with the current date, and displays the Inter-County Transfers list screen.
No	Closes the Cancel Transfer Request Pop-up without cancelling the Inter-County Transfer and displays the View Inter-County Transfer screen.

Data Elements

There are no Data Elements associated with the Cancel Transfer Request pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Inter-County Transfer

CI
CI-67702 - DSD SC Modify Inter-County Transfer IMPLEMENTED

When the Edit link is selected from the View Inter-County Transfer screen or the Inter-County Transfers list screen, the Modify Inter-County Transfer pop-up displays.

Figure – Modify Inter-County Transfer

Actions/Functions

The following actions are associated with the Modify Inter-County Transfer pop-up:

Action	Function
Save	Saves data after providing valid information.
Cancel	Cancel takes back to the Inter-County Transfers list screen.
New Address	Displays the address entry or editing associated with the Recipient's new residence in the receiving County. The address is verified through the address validation and standardization service.
Assigned Worker	Displays the User Search screen which allows searching for an assignment of a social worker in the receiving county.

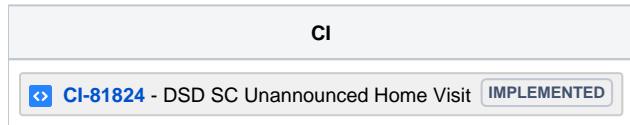
Data Elements

The following data elements are associated with the Modify Inter-County Transfer pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Details					
Sending County	The county from where the Recipient currently lives.	String	No	No	No
Sending County Notified	The date the Sending County was notified of the intended move. Displays in MM/DD/YYYY format.	Date	No	No	No

Receiving County	The county where the Recipient intends to move.	String	No	No	No
Date Of Move	Recipients intended date of move. Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
New Phone Number	Recipient new phone number in the receiving county. Displays in [Area Code] [Phone Number] format	Number	No	No	Yes
Extension	The extension associated with the indicated phone number	Number	No	No	Yes
Assigned Worker	Assigned Worker in the Receiving County, for Inter-County Transfer.	String	No	No	Yes
Residence Address					
New Address	Recipient residence new address in the Receiving County.	String	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Unannounced Home Visit List



When the Unannounced Home Visit (UHV) Navigation Page Tab is selected from the Quality Assurance Content Tab, the Unannounced Home Visit screen displays.

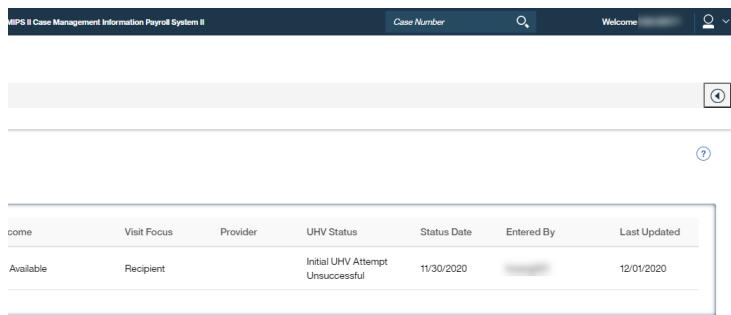


Figure – Unannounced Home Visit

Actions/Functions

The following actions are associated with the Unannounced Home Visit list screen:

Action	Function
New	Displays the Create Unannounced Home Visit pop-up.
Inactivate	Displays the Inactivate Unannounced Home Visit confirmation pop-up to allow inactivation of the selected record. This action is only allowed against a record which does not have an indicated Outcome.
View	Displays the View Unannounced Home Visit Details screen.

Data Elements

The following data elements are specific to the Unannounced Home Visit list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Home Visit Date Time	The date of the initial unannounced home visit occurred. Displays in MM/DD/YYYY HH:MM	Date Timestamp	No	No	No
Reason	The reason for them most recent unannounced home visit	String	No	No	No
Outcome	The outcome of the most recent unannounced home visit (Initial or Follow-up or Final)	String	No	No	No
Visit Focus	The focus of the home visit. Values are Recipient or Provider	String	No	No	No
Provider	Provider number if Visit Focus is Provider	Number	No	No	No
UHV Status	Overall Status of UHV series	String	No	No	No
Status Date	Date of UHV series Status. Displays in MM/DD/YYYY	Date	No	No	No
Entered By	User ID of person who created Initial unannounced home visit	String	No	No	No
Last Updated	Date of most recent event action update (does not include comments on follow-up and final events). Displays in MM/DD/YYYY HH:MM	Date	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Unannounced Home Visit

CI	Document Name
CI-81825 - DSD SC Create Unannounced Home Visit [IMPLEMENTED]	DSD_SC_Create_Unannounced_Home_Visit.doc

When the New link is selected on the Unannounced Home Visit list screen, the Create Unannounced Home Visit pop-up displays.

Figure – Create Unannounced Home Visit

Actions/Functions

The following actions are associated with the Create Unannounced Home Visit pop-up:

Action	Function
Save	Saves the screen and displays the Unannounced Home Visit list screen.
Cancel	Closes the screen and displays the Unannounced Home Visit list screen.
Provider	Displays a list screen with all case Providers allowing the user to select the appropriate Provider

Data Elements

The following data elements are associated with the Create Unannounced Home Visit pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Unannounced Home Visit					
Home Visit Date Time	The date the Unannounced Home Visit occurred. Displays in MM/DD /YYYY HH:MM	Date Timestamp	Yes	No	Yes
Outcome	The outcome of the Unannounced Home Visit	Drop-down list	No	No	Yes
Reason	The reason the Unannounced Home Visit required	Drop-down list	Yes	No	Yes
Visit Focus	The focus of the home visit. Values are Recipient or Provider	Drop-down list	Yes	No	Yes
Comments					
Comment	Allows user entry of comment	Text	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Unannounced Home Visit

CI	Document Name
CI-81823 - DSD SC Modify Unannounced Home Visit [IMPLEMENTED]	DSD_SC_Modify_Unannounced_Home_Visit.doc

When the Edit link associated with a specific Unannounced Home Visit is selected on the View Unannounced Home Visit Details screen, the Modify Unannounced Home Visit screen displays.

The screenshot shows a web-based application interface for modifying an unannounced home visit. At the top, there's a navigation bar with links for 'Case Number' and 'Welcome'. Below the header, there's a large input form. The form contains fields for 'Status' (set to 'Initial UHV Attempt Unsuccessful') and 'Status Date' (set to '11/30/2020'). A dropdown menu labeled 'Provider' is present. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Figure – Modify Unannounced Home Visit

Actions/Functions

The following actions are associated with the Modify Unannounced Home Visit screen:

Action	Function
Save	Saves the screen and displays the Unannounced Home Visit list screen.
Cancel	Dismisses the Modify Unannounced Home Visit screen and displays the Unannounced Home Visit list screen.
Provider	Displays a list screen with all case Providers allowing the user to select the appropriate Provider

Data Elements

The following data elements are associated with the Modify Unannounced Home Visit screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Unannounced Home Visit					
Home Visit Date Time	The date the Unannounced Home Visit occurred. Displays in MM/DD/YYYY HH:MM	Date Timestamp	No	No	No
Status	The status of the Unannounced Home Visit.	String	No	No	No
Reason	The reason the Unannounced Home Visit required	String	No	No	No
Status Date	Date of the status shown in the 'Status' field.	Date Timestamp	No	No	No
Visit Focus	The focus of the home visit. Values are Recipient or Provider	Drop-down list	Yes	No	Yes
Outcome	The outcome of the Unannounced Home Visit	Drop-down list	Yes	No	Yes

Comments					
Comments	Allows the user to enter comment relevant to the Unannounced Home Visit	Text	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactivate Unannounced Home Visit

CI	Document Name
CI-116581 - DSD SC Inactivate Unannounced Home Visit IMPLEMENTED	DSD_SC_Inactivate_Unannounced_Home_Visit.doc

When the Inactivate link is selected from the Unannounced Home Visit screen the Inactivate Unannounced Home Visit confirmation pop-up displays.

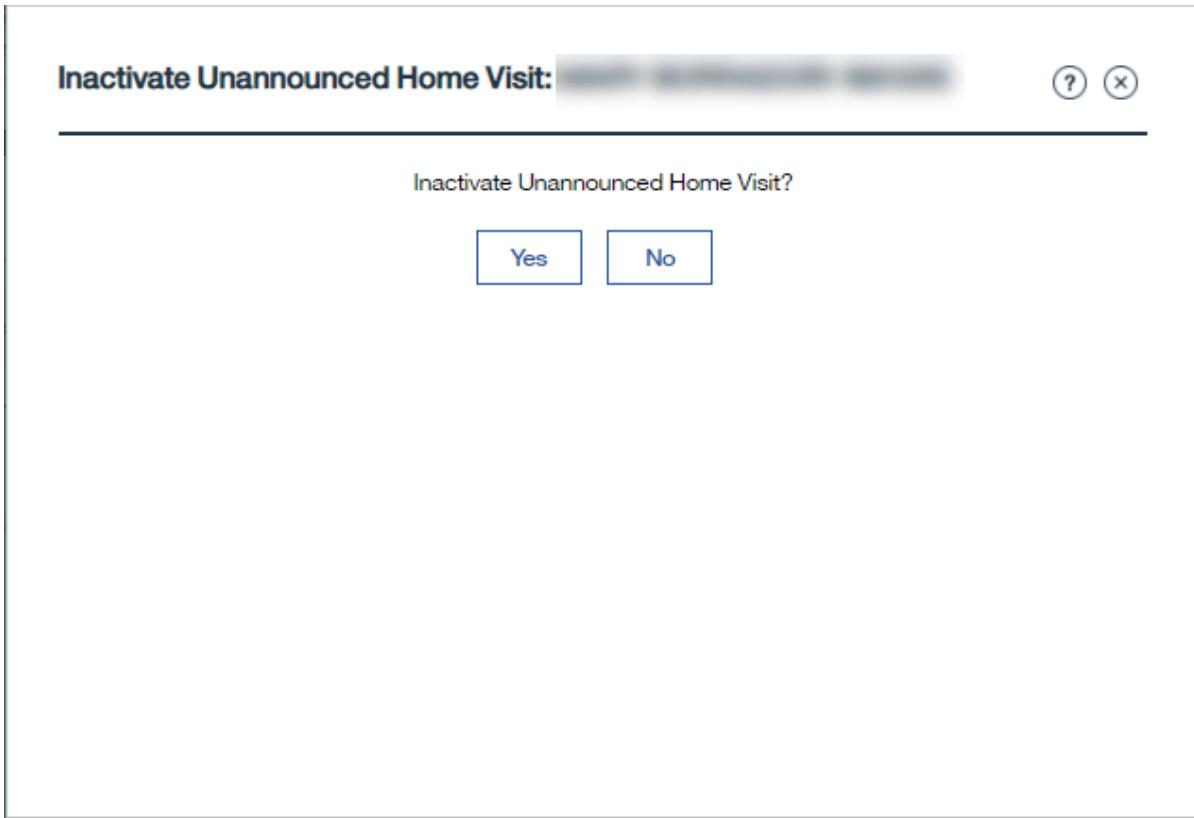


Figure – Inactivate Unannounced Home Visit

Actions

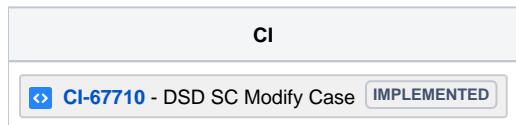
The following actions are associated with the Inactivate Unannounced Home Visit pop-up.

Action	Function
Yes	The record will be inactivated, the Unannounced Home Visit list screen displays and the record will no longer be displayed
No	Cancels the action and displays the Unannounced Home Visit list screen

Data Elements

There are no data elements associated to the Inactivate Unannounced Home Visit pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Case Home



When the Edit link is selected from the Case Home, the Modify Case pop-up displays.

The screenshot shows a modal dialog box for modifying a case. At the top right are a question mark icon and a close button. Below that is a note: "* required field". The main form contains the following data:

Case Number:	Status:	Application Withdrawn
Client Name:	Status Date:	12/10/2020
Referral Date:	Resource Suspension End Date:	<input type="text"/>
Expiration Date:	County:	Yolo
Priority Referral Date:	District Office:	57 01 District Office
Initial Eligibility Expiration Date:	Case Owner:	<input type="text"/>
Next Visit Date:	Companion Case:	No
Ever Available:	State Hearing:	No
Household Members:	Mail Designee:	<input type="text"/>
Number of Providers:		0

Below this is a section titled "Special Project Coding" with four input fields for County Use 1 through 4.

At the bottom is a "Comments" section with a large text area and two buttons at the bottom left: "Save" and "Cancel".

Figure – Modify Case

Actions/Functions

The following actions are associated with the Modify Case pop-up:

Action	Function

Save	This action allows the user to save modified case details. The pop-up is closed and the user is returned to the Case Home screen.
Cancel	Cancels the action returning the user to the Case Home screen.

Data Elements

The following data elements are associated with the Modify Case pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editabile Field
Details					
Case Number	Case Number of the Case.	Number	No	No	No
Recipient Name	Name of the Recipient. Displayed as First Name Last Name.	String	No	No	No
IHSS Referral Date	IHSS Referral Date of the Recipient. Displays in MM/DD/YYYY format.	Date	No	No	No
IHSS Application Date	IHSS Application Date of the Recipient. Displays in MM/DD/YYYY format.	Date	No	No	No
Medi-Cal Eligibility Referral Date	Medi-Cal Eligibility Referral Date of Recipient. Displays in MM/DD/YYYY format.	Date	No	No	No
Medi-Cal Initial Eligibility Notification Date	Medi-Cal Initial Eligibility Notification Date of Recipient. Displays in MM/DD/YYYY format.	Date	No	No	No
In-Home Visit Date	In-Home Visit Date. Displays in MM/DD/YYYY format.	Date	No	No	No
Interpreter Available	Interpreter Available.	Check Box	No	No	Yes
Number Of Household Members	Indicates the number of persons in the household.	Number	No	No	No
Status	Case Status.	String	No	No	No
Status Date	The date of the Status last changed.	String	No	No	No
Resource Suspension End Date	The Resource Suspension End Date keyed when the case was placed in Leave Status. Next authorization Start Date may not be on or before this date. Displays in MM/DD/YYYY format.	Date	No	No	Yes
County	County who owns the case.	String	No	No	No
District Office	District Office of the Case.	String	No	No	No
Case Owner	Owner of the Case.	String	No	No	No
Companion Case	Indicates whether or not (Yes or No) if Companion Cases have been added to this case.	String	No	No	No
State Hearing	Indicates whether or not, (Yes or No), there are State Hearings associated with the case.	String	No	No	No
Mail Designee	Indicates the individual to whom Recipient correspondence (Mail) is addressed. Displayed as First Name Last Name.	String	No	No	No
Number of Active Providers	The number of provider currently working for the recipient	String	No	No	No
County Use – Special Project Coding					
County Use 1	Free text field that can be used by a county for special project coding	String	No	No	Yes
County Use 2	Free text field that can be used by a county for special project coding	String	No	No	Yes
County Use 3	Free text field that can be used by a county for special project coding	String	No	No	Yes
County Use 4	Free text field that can be used by a county for special project coding	String	No	No	Yes
County Use Comments					
County Use Comments ¹	Freeform text entry	String	No	No	Yes

¹ County Use Comment – This is a 50 character freeform text entry field. There is no associated history.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Withdraw Case

CI	Document Name
CI-67696 - DSD SC Withdraw Case IMPLEMENTED	DSD_SC_Withdraw_Case.doc

When the Withdraw link is selected from the Case Home screen, the Withdraw Case pop-up displays. The user enters the date on which the applicant chooses to withdraw his/her IHSS application for services and the withdrawal reason. The Status of the Case will display as Withdrawn when the calendar date entered as the Withdrawal Date is reached. If the date is a past date when this screen is saved, the Status on the Case Home will indicate Withdrawn. A case which is currently in "Withdrawn" status cannot have the withdraw action rescinded, but rather the "New Application" action must be taken.

The screenshot shows a modal dialog titled "Withdraw Case: [REDACTED]". Inside, there's a section labeled "Withdrawal Details" with two fields: "Withdrawal Date:" (marked with an asterisk) and "Reason:". The "Withdrawal Date:" field has a date input and a calendar icon. The "Reason:" field is a dropdown menu. At the bottom right are "Save" and "Cancel" buttons. A red asterisk followed by "required field" is located above the "Withdrawal Date:" field.

Figure – Withdraw Case

Actions/Functions

The following actions are associated with the Withdraw Case pop-up:

Action	Function
Save	Saves the action, displaying the Case Home screen.
Cancel	Cancels the action displaying the Case Home screen.

Data Elements

The following data elements are associated with the Withdraw Case pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field

Withdrawal Date	The Date the Withdrawal was requested. Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
Reason	The reason the applicant indicated they wanted to withdraw their IHSS application. (For Values see Code table section)	Drop down list	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Leave Case

CI	Document Name
CI-67679 - DSD SC Leave Case IMPLEMENTED	DSD_SC_Leave_Case.doc

When the Leave link is selected from the Case Home screen, the Leave Case pop-up displays. The user enters as the "Authorization End Date" the date on which the Recipient's Leave status begins and the Leave Reason. When this pop-up is saved, the case status will be updated to Leave, if the date is a past date, an NOA will be produced indicating the Leave Reason, and payments will not be allowed after the "Authorization End Date". If Reason "Undervalue disposal of resources." is selected, the "Resource Suspension End Date" is required. The Status of the Case will display as Leave when the calendar date entered as the Authorization End Date is reached. If the date is a past date when this screen is saved the Status on the Case Home will indicate Leave.

The screenshot shows a modal dialog titled "Leave Case: [REDACTED]". The dialog has a header with a question mark icon and a close button. Below the header is a note: "* required field". The main area is titled "Leave Details" and contains three input fields: "Authorization End Date" (with a red asterisk), "Resource Suspension End Date" (with a red asterisk), and "Reason" (with a dropdown arrow). At the bottom right are "Save" and "Cancel" buttons.

Figure – Leave Case

Actions/Functions

The following actions are associated with the Leave Case pop-up:

Action	Function
Save	Saves the data and displays the Case Home screen.
Cancel	Cancels the action displaying the Case Home screen.

Data Elements

The following data elements are associated with the Leave Case pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Authorization End Date	The End Date of the current active evidence. Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
Resource Suspension End Date	This is the date that the Recipient's suspension for the undervalue disposal of resources will end. Displays in MM/DD/YYYY format.	Date	No. Only required if 'Undervalue disposal of resources' reason is indicated.	No	Yes
Reason	The reason the case was put in Leave Status. (For Values see Code table section)	Drop down list	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Terminate Case

CI	Document Name
CI-67716 - DSD SC Terminate Case IMPLEMENTED	DSD_SC_Terminate_Case.doc

When the Terminate Case link is selected from the Case Home screen, the Terminate Case pop-up displays. The user enters the Authorization End Date (the last date on which the case should be paid) and the Termination Reason. When the pop-up is saved a terminated authorization segment is created and payments will not be allowed after the indicated Authorization End Date.

The Status of the Case will display as Terminated once the calendar date entered as the Authorization End Date is reached. If the date is a past date when this pop-up is saved the Status on the Case Home will immediately indicate Terminated.

Figure – Terminate Case

Actions/Functions

The following actions are associated with the Terminate Case pop-up:

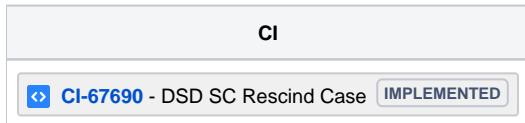
Action	Function
Save	Saves the data and returns the user to the Case Home screen.
Cancel	Cancels the action returning the user to the Case Home screen.

Data Elements

The following data elements are associated with the Terminate Case pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Authorization End Date	The last date services are authorized for this Recipient (Authorization End Date of the current active evidence). Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
Reason	The Reason for the Case Termination. (For Values see Code table section)	Drop down list	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Rescind Case – Medi-Cal Eligibility Month Record Exists for Rescind Month



When the Rescind Case link is selected from the Case Home screen and a Medi-Cal Eligibility Record exists for the Eligibility Month in which the Rescind action occurs and the associated Medi-Cal Eligibility Status does not begin or end with a "9," or a Medi-Cal Eligibility Record exists, but the Medi-Cal Eligibility Status begins or ends with a "9," the Rescind Case pop-up displays.

A screenshot of a 'Rescind Case' pop-up window. The window has a header with a question mark icon, a close button, and a note '* required field'. It contains fields for 'First Medi-Cal Eligibility Month' (11/2020), 'Status' (001), 'Rescind Date' (12/01/2020), 'Reason' (a dropdown menu), and 'CLIENT INDEX NUMBER' (a search bar with a magnifying glass icon). At the bottom are 'Save' and 'Cancel' buttons.

Figure – Rescind Case

Actions/Functions

The following actions are associated with the Rescind Case pop-up:

Action	Function
Save	Saves the data and returns the user to the Case Home screen.
Cancel	Cancels the action and returns the user to the Case Home screen.
Client Index Number – Look-up	Displays the pop-up to execute a Client Index Number search to SCI for the selection of a CIN. Refer to Statewide Client Index – CIN Search for details. Note: This is only available when either no Medi-Cal Eligibility Record exists for the month in which the Rescind action occurs, or when a Medi-Cal Eligibility Record exists, but the Medi-Cal Eligibility Status begins or ends with a "9."

Data Elements

The following data elements are associated with the Rescind Case pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Rescind Date	The date the Rescind Case action is taken. Displays in MM/DD/YYYY format.	Date	No	Current Date	No
Last Medi-Cal Eligibility Month	The last Medi-Cal Eligibility Month record which currently exists for the Recipient case, displays in MM/YYYY format.	String	No	No	No
Reason	The reason the Rescind Case action is being taken.	Drop-Down list	Yes	No	Yes
Status	The Medi-Cal Eligibility Status on the last Medi-Cal Eligibility Month record.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Rescind Case with Client Index Number Search

CI	Document Name
 CI-116584 - DSD SC Rescind Case with Client Index Number Search CANCELLED	DSD_SC_Rescind_Case_with_Client_Index_Number_Search.doc

This is cancelled by ASR Feature 8 - Case Maintenance

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Reactivate Case

CI	Document Name
CI-67688 - DSD SC Reactivate Case IMPLEMENTED	DSD_SC_Reactivate_Case.doc

When the New Application link is selected from the Case Home screen, the Reactivate Case pop-up displays.

Figure – Reactivate Case

Actions/Functions

The following actions are associated with the Reactivate Case pop-up:

Action	Function
Save	Saves the data, changes the case status from the previous Terminated, Denied or Application Withdrawn to Pending.
Cancel	Cancels the action returning the user to the Case Home screen.
Assigned Worker	Displays User Search screen to allow the assignment of a worker to the case.
Client Index Number	Displays a screen to execute a search using applicant data to search SCI for the selection of a Client Index Number.

Data Elements

The following data elements are associated with the Reactivate Case pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Interpreter Available	Indicates whether or not an interpreter is available in the home.	Check Box	No	Unselected	Yes
IHSS Referral Date	Referral Date of the Recipient. Displays in MM/DD/YYYY format.	Date	Yes	Current date	Yes

Meets Residency Requirement	Allows user to indicate whether the applicant meets the IHSS Residency Requirements. (For Values see Code table section)	Drop-down list	Yes	No	Yes
Referral Source	Allows the user to identify the Referral Source. (For Values see Code table section)	Drop-down list	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Medi-Cal Eligibility List

CI	Document Name
CI-67574 - DSD SC MediCal Eligibility List IMPLEMENTED	DSD_SC_MediCal_Eligibility_List.doc

When the Medi-Cal Eligibility Navigation Page Tab on the Case Home Content Tab is selected, the Medi-Cal Eligibility list screen displays. Upon entry to the screen, the first 50 Medi-Cal Eligibility records (descending by Eligibility Month) received from MEDS are displayed. If there are more records available, the Next link can be selected to display the next 50 records. The number of available records will not be displayed on the initial screen.

ID	Medi-Cal SOC	Medi-Cal Case Number	FFP	Medi-Cal Eligibility Status	AID Code	Last Updated Date	Type
8814.00	[REDACTED]	[REDACTED]	Yes	501	67	07/28/2020 19:29	MEDS Monthly Renewal Eligibility Record
8814.00	[REDACTED]	[REDACTED]	Yes	501	67	06/25/2020 19:41	MEDS Monthly Renewal Eligibility Record
8814.00	[REDACTED]	[REDACTED]	Yes	501	67	05/27/2020 19:42	MEDS Monthly Renewal Eligibility Record
8814.00	[REDACTED]	[REDACTED]	Yes	501	67	04/24/2020 19:37	MEDS Monthly Renewal Eligibility Record
8814.00	[REDACTED]	[REDACTED]	Yes	501	67	03/26/2020 19:51	MEDS Monthly Renewal Eligibility Record

Figure – Medi-Cal Eligibility List

Actions/Functions

The following actions are associated with the Medi-Cal Eligibility List screen:

Action	Function
SAWS Eligibility Information	Displays the View SAWS Eligibility Information pop-up
<<Previous	Displays the previous 50 Medi-Cal Eligibility records. This hyperlink is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of Medi-Cal Eligibility records (up to 50). This hyperlink is only displayed when there are additional records to be displayed.
View	Displays the View Medi-Cal Eligibility Information pop-up for the selected service month.

Data Elements

The following data elements are associated with the Medi-Cal Eligibility List screen. The fields are read-only.

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Eligibility Month	The MEDS Eligibility Month (MM/YYYY)	Date	No	No	No
MEDS ID	The MEDS ID (SSN) of the Recipient.	String	No	No	No

Medi-Cal SOC	Medi-Cal Share of Cost.	Decimal	No	No	No
Medi-Cal Case Number	Medi-Cal Case Number.	Number	No	No	No
FFP	Federal Financial Participation indicator	String	No	No	No
Medi-Cal Eligibility Status	Medi-Cal Eligibility Status.	String	No	No	No
AID Code	The Medi-Cal Primary Aid Code.	String	No	No	No
Last Updated Date	The date the Service Month record was last updated. Displays in MM/DD/YYYY HH:MM	Date Timestamp	No	No	No
Type	The record type associated with the Last Update.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/SAWS Eligibility Information

CI	Document Name
CI-8186 - DSD SC SAWS Eligibility Information IMPLEMENTED	DSD_SC_SAWS_Eligibility_Information.doc

When the SAWS Eligibility Information link is selected from the Medi-Cal Eligibility list screen, the SAWS Eligibility Information pop-up displays with the most recent SAWS based Medi-Cal eligibility information received from SAWS.

The screenshot shows a modal dialog box titled "SAWS Eligibility Information". At the top right are a help icon (?) and a close button (X). The main content area contains the following fields:

- Last Updated: 12/02/2019 13:31
- Update Type:
- Medi-Cal Status:
- EW First Name:
- Medi-Cal Status Effective Date:
- EW Last Name:
- Medi-Cal Status Reason:
- Eligibility Worker Phone:
- SAWS Serial:
- Eligibility Worker Email:

At the bottom right of the modal is a "Close" button.

Figure – SAWS Eligibility Information

Actions/Functions

The following hyperlink functionality will be associated with the SAWS Eligibility Information pop-up:

Action	Function
Close	Returns user to the Medi-Cal Eligibility list screen.

Data Elements

The following are the data elements associated with SAWS Eligibility Information pop-up.

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Last Updated	Last Updated MM/DD/YYYY HH:MM (8)	Date Timestamp	No	No	No
Update Type	Type of SAWS Update which was applied	String	No	No	No

Medi-Cal Status	Medi-Cal Eligibility Status (25)	String	No	No	No
EW First Name	The first name of the SAWS Eligibility Worker	String	No	No	No
Medi-Cal Status Effective Date	The date on which the report Medi-Cal Eligibility Status is effective. Displays in MM /DD/YYYY format.	Date	No	No	No
EW Last Name	The last name of the SAWS Eligibility Worker	String	No	No	No
Medi-Cal Status Reason	The reason the Medi-Cal status was assigned	String	No	No	No
Eligibility Worker Phone	The telephone number of the SAWS Eligibility Worker. Displays in [Area Code] [Phone Number] format	Number	No	No	No
SAWS Serial Number	A unique identifier for SAWS	Number	No	No	No
Eligibility Worker Email	The email address of the SAWS Eligibility Worker	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Medi-Cal Eligibility

CI	Document Name
 CI-67560 - DSD SC View MediCal Eligibility-Case IMPLEMENTED	DSD_SC_View_MediCal_Eligibility-Case.doc

When the View link is selected on the Medi-Cal Eligibility list screen for a specific Eligibility Month, the View Medi-Cal Eligibility pop-up displays. This pop-up will display the most current Medi-Cal Eligibility information processed from MEDS. As Daily MEDS Updates are received and processed by CMIPS for a specific Eligibility Month, the applicable Eligibility Month record will be updated.

View Medi-Cal Eligibility: [REDACTED] (?) (X)

Medi-Cal Eligibility Information

Eligibility Month:	07/2020	Last Updated:	06/25/2020 19:58
Medi-Cal Eligibility Status:	301	Record Type:	MEDS Monthly Renewal Eligibility Record
Medi-Cal Aid Code:	10	FFP:	Yes
Medi-Cal Share Of Cost:	\$0.00	BIC Issue Date:	04/12/2005
Medi-Cal County ID:	Los Angeles	Medi-Cal County Serial:	9623886
County FBU:	5	County Person Number:	44
MEDS ID:	[REDACTED]	Medi-Cal Date of Birth:	06/16/1937
SSN Verification Code:	SSN identified as verified via prior SSN verification process	Medi-Cal Denial Reason:	
SSI Living Arrangement:	Own Household	Medi-Cal Denial Date:	
Optional Living Arrangement:	Independent living with cooking facilities	Refugee Alien Status:	Lawful Permanent Resident (LPR)
Date of Death:		INS Date Of Entry:	04/1996
Death Source:		Identity Document Type:	
CIN:	[REDACTED]	Citizenship Document Type:	
Disability Onset Date:	08/2002	RV Due Month:	
Application Date:	10/15/2014	Last RV Completed Date:	04/2011

Health Care Plan Information

Plan County:	Los Angeles	Plan Status Code:	01
Plan Code:	304		

Share of Cost Details...
Close

Figure – View Medi-Cal Eligibility

Actions/Functions

The following actions are associated with the View Medi-Cal Eligibility List pop-up:

Action	Function
Share of Cost Details	Displays the Share of Cost Details pop-up for the Eligibility Month
Close	Closes the screen and displays the Medi-Cal Eligibility list screen
Edit	This link will display only when user is assigned to the appropriate Security Group. When selected, the Modify MEDS Eligibility Screen displays.

Data Elements

The following data elements are associated with View Medi-Cal Eligibility Information pop-up.

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Medi-Cal Eligibility Information					
Eligibility Month /Year	Eligibility Month/Year (MM/YYYY)	Date	No	No	No
Last Updated	Last Updated (MM/DD/YYYY HH:MM)	Date Timestamp	No	No	No
Medi-Cal Eligibility Status	Medi-Cal Eligibility Status	String	No	No	No
Record Type	Record Type	String	No	No	No
Medi-Cal Aid Code	Medi-Cal Aid Code	String	No	No	No
FFP	FFP	String	No	No	No
Medi-Cal Share of Cost	Medi-Cal Share of Cost	Number	No	No	No
BIC Issue Date	BIC Issue Date (MM/DD/YYYY)	Date	No	No	No
Medi-Cal County ID	Medi-Cal County ID	Number	No	No	No
Medi-Cal County Serial	Medi-Cal County Serial	String	No	No	No
County FBU	County FBU	Number	No	No	No
County Person Number	County Person Number	Number	No	No	No
MEDS ID	MEDS ID	String	No	No	No
Medi-Cal Date of Birth	Medi-Cal Date of Birth (MM/DD/YYYY)	Date	No	No	No
SSN Verification Code	SSN Verification Code	String	No	No	No
Medi-Cal Denial Reason	Medi-Cal Denial Reason	String	No	No	No
SSI Living Arrangement	SSI Living Arrangement	String	No	No	No
Medi-Cal Denial Date	Medi-Cal Denial Date (MM/DD/YYYY)	Date	No	No	No
Optional Living Arrangement	Optional Living Arrangement	String	No	No	No
Refugee Alien Status	Refugee – Alien Status	String	No	No	No
Date of Death	Death Date MM/DD/YYYY	Date	No	No	No
INS Date Of Entry	INS Date of Entry (MM/DD/YYYY)	Date	No	No	No
Death Source	Death Source	String	No	No	No
Identity Document Type	Identity Document Type	String	No	No	No
CIN	CIN + Check Digit	String	No	No	No

Citizenship Document Type	Citizenship Document Type	String	No	No	No
Disability Onset Date	Disability Onset Date (MM/DD/YYYY)	Date	No	No	No
RV Due Month	The Month in which the next Medi-Cal Review is due (MM)	Number (01-12)	No	No	No
Application Date	Medi-Cal Application Date (MM/DD/YYYY)	Date	No	No	No
Last RV Completed Date	Last RV Completed Date (MM/DD/YYYY)	Date	No	No	No

Health Care Plan Information

NOTE: This cluster will only display if there is HCP data for the Recipient for the identified Medi-Cal Eligibility record

Plan County	Displays the County Name associated with the health care plan identified for the Recipient. Look up is based on HCP County Code.	String	No	No	No
Plan Code	Displays the health care plan code. There is no look up available.	String	No	No	No
Plan Status Code	Displays the recipient status with the identified health plan. Note: MEDS Quick Reference Guide can be used by the County for look up.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Share of Cost Details

CI	Document Name
CI-67672 - DSD SC Share of Cost Details IMPLEMENTED	DSD_SC_Share_of_Cost_Details.doc

When the Share of Cost Detail link is selected from the View Medi-Cal Eligibility pop-up for a specific Eligibility Month, the Share of Cost Details pop-up displays. The data in the Details and Initial Buy-Out sections are static; displaying the Medi-Cal Eligibility information used to process the Buy-Out at the time the MEDS Monthly Renewal is processed. Buy-Out processing was eliminated from the IHSS Program effective 10/01/2009, so records on or after that date will not be populated.

The Recipient Reimbursement History data is populated as Reimbursement of Buy-Out transactions are keyed. Reimbursement payments may not be keyed for Eligibility Months on or after October 2009.

The screenshot shows a modal dialog box with the following content:

- Details Section:** Contains fields for Medi-Cal Eligibility Status (001), IHSS Funding Program (00), and Non-Reversed SOC Amount (\$0.00).
- Initial Buy-Out Section:** Contains fields for IHSS AUTH (\$0.00), Applied Amount (\$0.00), and Error (00).
- Recipient Reimbursement History Section:** Contains fields for Amount, User, Void Date, and User.

A "Close" button is located at the bottom left of the dialog.

Figure – Share of Cost Details

Actions/Functions

The following actions are associated with the Share of Cost Detail pop-up:

Action	Function
Close	Closes the screen and displays the Medi-Cal Eligibility list screen.

Data Elements

The following data elements are associated with the Share of Cost Detail pop-up.

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Details					
Eligibility Month	The MEDS Eligibility Month. MM/YYYY	Date	No	No	No
Medi-Cal Eligibility Status	Medi-Cal Eligibility Status.	String	No	No	No
Medi-Cal SOC	Medi-Cal Share of Cost.	String	No	No	No
IHSS Funding Program	The IHSS Funding Program for the Eligibility Month.	String	No	No	No
Medi-Cal Case Number	Medi-Cal Case Number.	String	No	No	No
Non-Reversed SOC Amount	The Non-Reversed SOC Amount for the Eligibility Month.	Decimal	No	No	No
FFP	Federal Financial Participation indicator (Y or N).	String	No	No	No
Related IHSS Cases					
Related IHSS Cases	Populated with Related IHSS Cases.	String	No	No	No
Initial Buy-Out					
Date	The date on which the Buy-Out was processed. Displays in MM/DD/YYYY format.	Date	No	No	No
IHSS Auth	The IHSS Authorization amount used in Buy-Out calculation.	Decimal	No	No	No
Requested Amount	The Buy-Out Amount requested to be applied to MEDS.	Decimal	No	No	No
Applied Amount	The Buy-Out Amount Applied to MEDS.	Decimal	No	No	No
MEDS SOC	The MEDS SOC amount used in the Buy-Out calculation.	Decimal	No	No	No
Error	Error Verbiage associated with the processing of the Buy-Out from Buy-Out wrap-back.	String	No	No	No
IHSS SOC	The IHSS SOC amount used in the Buy-Out calculation.	String	No	No	No
Recipient Reimbursement					
Transaction Date	The date on which the "Missed Buy-Out" payment was issued. Displays in MM /DD/YYYY format	Date	No	No	No
Transaction	The type of payment transaction.	String	No	No	No
Amount	The payment amount.	String	No	No	No
User	The CMIPS user who keyed the payment.	String	No	No	No
Void Date	The Date the payment was Voided. Displays in MM/DD/YYYY format.	Date	No	No	No
User	The CMIPS user who keyed the Void Transaction.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Forms

CI	Document Name
 CI-71055 - DSD SC Forms IMPLEMENTED	DSD_SC_Forms.doc

When the Forms/Correspondence Navigation Page Tab is selected from the Case's Content Tab, the Form/Correspondence screen displays. When the user navigates to this screen, the default view is the Forms and Correspondence tab which displays the forms printed and the correspondence issued against the case for the previous three (3) month period or up to a maximum of 50 records. The user may search for forms and correspondence for earlier periods using the Search Criteria.

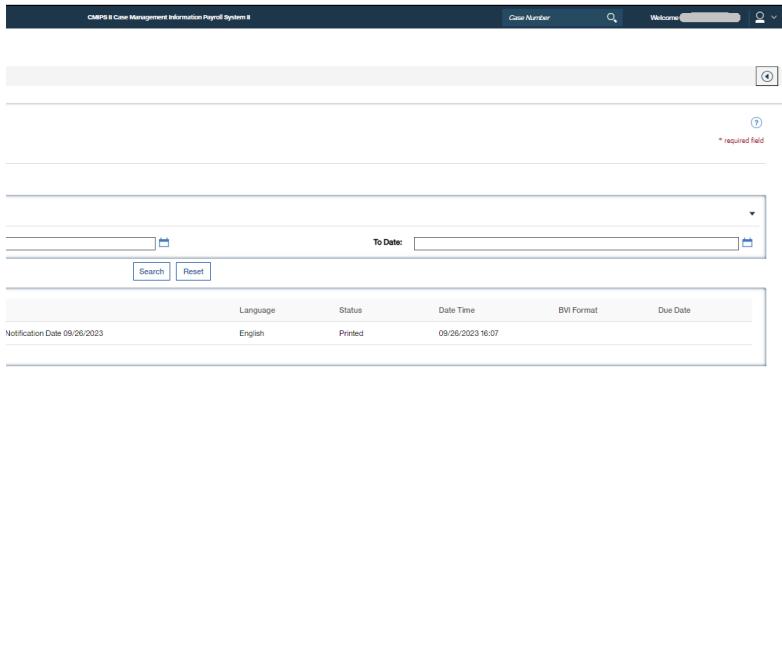


Figure – Forms

Actions/Functions

The following actions are associated with the Forms list screen:

Action	Function
Electronic Forms	Displays the Electronic Forms screen.
New	Displays the Create Form pop-up.
Search Criteria	
Search	Searches for previously printed forms or correspondence for the user entered date range. Maximum range is three (3) months.
Reset	Resets the From Date and To Date to blank.
<<Previous	Displays the previous 50 Forms records matching the specified criteria. This hyperlink is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of Forms records (up to 50) matching the specified criteria. This hyperlink is only displayed when there are additional records to be displayed.
Form/Correspondence List	
View	Displays the View Form screen associated with the selected record
Edit	Displays the Modify and Inactivate Form pop-up associated with the selected record.

History	Displays the Forms History screen
Print	Opens Adobe Acrobat and displays the associated PDF for the selected record from which the user may print the pdf. Note: This link does not display if no PDF attachment exists.

Data Elements

The following data elements are associated with the Forms list screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria					
From Date	The date from which the search will begin.	Date (MM/DD/YYYY)	No	No	Yes
To Date	The date on which the search will end.	Date (MM/DD/YYYY)	No	No	Yes
Form/Correspondence List					
Name	Form name	String	No	No	No
Language	Language in which the record was printed.	String	No	No	No
Status	Form Communication Status: • Pending • Printed • Inactivated • Not Mailed • Suppressed for Wage Rate • Suppressed • Pending Reprint • Reprinted • Mailed	String	No	No	No
Date Time	Date and Time associated to the current status of the form.	Date Time (MM/DD/YYYY) (HH:MM)	No	No	No
BVI Format	When the Recipient is indicated as BVI, one of the following will display to indicate the format of the BVI component: • Audio CD • Data CD • Braille Documents • Large Font NOA • Large Font Documents • No Accommodation is Needed • County Support • N/A For those recipients that are not indicated as BVI a space will be displayed.	String	No	No	No
Due Date	The Due Date for 3rd party electronic forms sent to ESP.	Date (MM/DD/YYYY)	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Form Pop-Up

CI	Document Name
 CI-67718 - DSD SC Create Form Pop-Up IMPLEMENTED	DSD_SC_Create_Form.doc

When the New link is selected on the Forms list screen, the Create Form Pop-Up screen displays. The Correspondent Name will default to the Mail Designee indicated on the Case Home screen (for example, Recipient or if the Recipient has a Guardian, the Correspondent Name will be the Guardian). The Language field defaults to the Recipient's written language if that language is available in a CMIPS translation. Otherwise the language defaults to English. The user may select a different language from the list. If a specific form is not available in the selected language, the form will print in English.

Create Form: [REDACTED]



* required field

Correspondent
Name: *

Print: *

Print in Nightly Batch

Language: *

English

Electronic Form
Due Date:



- Form Name
- Application / Assessment Package (295,426,332,827,293)
- CR 6181 - Interpreter Services Statement and Confidentiality Agreement
- Provider Enrollment Package (847,332,426)
- SCIF e3067 Workers Compensation Claim Form
- SOC 293 - Needs Assessment Form
- SOC 295 - Application For Social Services
- SOC 295L - Application For Social Services - Large Font
- SOC 310 - Statement Of Facts For IHSS
- SOC 321 - Request For Order And Consent ParaMedical Services
- SOC 332 - IHSS Recipient/Employer Responsibility Check List
- SOC 332L - IHSS Recipient/Employer Responsibility Check List - Large Font
- SOC 404 - Recipient Direct Deposit Outreach Letter
- SOC 409 - IHSS/CMIPS Elective State Disability Insurance (SDI)
- SOC 426 - IHSS Program Provider Enrollment Form
- SOC 426A - Recipient Designation Of Provider Form
- SOC 450 - Voluntary Services Certification
- SOC 821 - Assessment Of Need For Protective Supervision
- SOC 825 - Protective Supervision 24 Hours A Day Coverage Plan
- SOC 827 - IHSS Individual Emergency Back-Up Plan
- SOC 829 - Enrollment/Change/Cancellation Form
- SOC 831 - Provider Direct Deposit Outreach Letter
- SOC 838 - Recipient Request For Assignment Of Authorized Hours To Providers
- SOC 839 - IHSS Desination of Authorized Representative

<input type="checkbox"/>	SOC 839A - IHSS Designation of Signatory for Timesheets and Other Provider-Related Documents
<input type="checkbox"/>	SOC 839B - Cancellation of Authorized Representative/TPRD Signatory
<input type="checkbox"/>	SOC 840 - Change Of Address Or Telephone
<input type="checkbox"/>	SOC 847 - Important Information For Prospective Providers About IHSS Enrollment
<input type="checkbox"/>	SOC 851A - Notice To Applicant Provider Of Incomplete Provider Process 15-Day Notification
<input type="checkbox"/>	SOC 855 - Notice To Recipient Of Provider Ineligibility
<input type="checkbox"/>	SOC 864 - IHSS Program Individualized Back-Up Plan and Risk Assessment
<input type="checkbox"/>	SOC 873 & 874 IHSS Program Health Care Certification and Requirements
<input type="checkbox"/>	SOC 873 - IHSS Program Health Care Certification
<input type="checkbox"/>	SOC 873L & 874L IHSS Program Health Care Certification and Requirements - Large Font
<input type="checkbox"/>	SOC 873L - IHSS Program Health Care Certification - Large Font
<input type="checkbox"/>	SOC 2270 - Notice to Recipient Failure to Complete Workweek Agreement

Paramedical Form

Text:

Figure – Create Form Pop-Up

Actions/Functions

The following actions are associated with the Create Form Pop-Up:

Action	Function
Save	Saves the selected forms information and sends to the indicated print queue and returns the user to the Forms list screen.
Reset	The Select Form box will revert back and display the default data seen upon entry to this screen.
Close	This action closes the screen displaying the Forms list screen without saving any updates information.

Data Elements

The following data elements are associated with the Create Form Pop-Up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field

Details						
Correspondent Name	Allows the user to select the search icon and select another Correspondent (Recipient, Guardian or Conservator or Provider) associated with the case.	String	Yes	Mail Designee on the Case Home screen	Yes	
Print	Allows the user to select where the form is printed.	Drop down	Yes	Print in Nightly Batch	Yes	
Language	Allows the user to select the language for printing the form.	Drop down	Yes	English	Yes	
Electronic Form Due Date	Allows the user to select a deadline for submitting the electronic form.	Date (MM/DD /YYYY)	No Note: Required only for SOC 321 and SOC 821 when using the 'Send Electronic Form to ESP' print option	No	Yes	
Form Name						
Form Checkbox	Allows the user to select the specific form to be printed	Check box	Yes	No	Yes	
Text Box						
Paramedical Form Text – Only displays if SOC 321 - Paramedical Form was selected and freeform text has been entered when the form was created.	Allows user to enter text to be printed in the "Additional Comments" section of the Paramedical Services Form (200 characters)	String	No	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs>Select Correspondent

CI	Document Name
CI-67682 - DSD SC Select Correspondent IMPLEMENTED	DSD_SC_Select_Correspondent.doc

When the Correspondent Name search link is selected from the Create Form pop-up, the Select Correspondent pop-up displays. This screen displays a list of the individuals associated to the case for which a form may be produced (Recipient, Guardian, Conservator, and Provider). When selected, the Correspondent Name will be populated to the Create Form pop-up.

Select Correspondent: [REDACTED] ? X

Action	Name	Type	Provider Status
Select	[REDACTED]	Recipient	
Select	[REDACTED]	Provider	Terminated
Select	[REDACTED]	Provider	Terminated
Select	[REDACTED]	Timesheet Signatory	

Close

Figure – Select Correspondent

Actions/Functions

The following actions are associated with the Select Correspondent pop-up:

Action	Function
Select	Allows the user to select a case participant which populates to the Case Participant field on the displayed Create Form pop-up.
Close	This action closes the screen and takes the user to the Create Form pop-up.

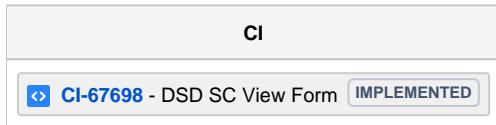
Data Elements

The following data elements are associated with the Select Correspondent pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field

Name	The list of case individuals associated with the case (Recipient, Conservator, Guardian, Provider, Emergency). Provider names are provided in the format [Last],[First] while all other names are provided in the format [First] [Last]	String	No	No	No
Type	The Person or Contact Type associated with the Correspondent	String	No	No	No
Provider Status	A Provider's Status associated to the Recipient case. Will only display if Type is Provider	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Form



When the View link is selected from the Forms screen, the View Form screen displays for the selected form. When there is a BVI NOA Option of Audio CD, Data CD, or Braille Documents on the Forms Screen a BVI NOA cluster will display. For the BVI NOA Option of 'Large Font' a BVI NOA cluster will not be displayed.

A screenshot of the CMIS Case Management Information System. The top navigation bar includes 'Case Number', 'Search', 'Welcome', and a user icon. The left sidebar lists various shortcuts like 'My Workspace', 'My Cases', 'Inbox', 'Case Home', 'Evidence & Authorization', 'Provider & Hours', 'Timesheets & Payroll', 'Overtime & Travel', and 'Quality Assurance'. The main content area is titled 'View Form: [REDACTED]'. It contains sections for 'Correspondent Details' (Correspondent Name: [REDACTED], Status: Printed, Language: English, Status Date: 10/19/2023, Suppress NOA: No), 'Reprint in Another Language' (Language: [REDACTED], Status: [REDACTED], Status Date: [REDACTED]), and 'Comments' (Comments: [REDACTED]). At the bottom are 'Edit...' and 'Close' buttons.

Figure – View Form

Actions/Functions

The following actions are associated with the View Form screen:

Action	Function
Edit	Displays the Modify and Inactivate Form pop-up displays.
Close	Closes the screen and displays the Forms list screen.
<Form Name>	Displays the previously printed form or correspondence in PDF format. Only displays when the status is "Printed" and a PDF attachment exists.

Data Elements

The following data elements are associated with the View Form screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria					
Correspondent Name	Name of the person associated with the form or correspondence. Displays in [Firstname Lastname] format	String	No	No	No
Language	Language the form was printed.	String	No	No	No
Status	Print Status (i.e. Pending, Printed, Not Mailed, or Inactivated).	String	No	No	No
Status Date	The date associated to the status.	Date (MM/DD/YYYY)	No	No	No

Mark as Inactive/Not Mailed	Indicates if the form was either Inactivated or Not Mailed.	String	No	No	No
Suppress NOA	Indicates if the form is a suppressed NOA.	String	No	No	No
Electronic Form Due Date	The Due Date for 3rd party electronic forms sent to ESP.	Date (MM/DD/YYYY)	No	No	No
Form Name	Displays the hyperlinked PDF of the printed form when the Status is Printed. Note: The hyperlink form will not display if the Status is Pending or Inactivated or if no PDF attachment exists. If there is no PDF to hyperlink, the form name will appear as static text.	String	No	No	No

BVI Format Detail – This cluster will only appear if the Form/Correspondence was also generated as Audio CD, Data CD or Braille Documents. It will also display for Large Font correspondence that is created by an outside vendor.

Option	Format of the BVI component: Audio CD Data CD Braille Document Large Font Document	String	No	No	No
Status Date	The date associated to status of the BVI component.	Date (MM/DD/YYYY)	No	No	No
Status	BVI Status: Pending Generation Generated Pending Regeneration Regenerated Mailed	String	No	No	No

Reprint in Another Language

Language	The language the most recent “reprint in another language” selection	String	No	No	No
Status Date	Displays the date the most recent “reprint in another language” status change occurred.	Date (MM/DD/YYYY)	No	No	No
Status	The status of the most recent “reprint in another language” (i.e. Pending Reprint and Reprinted)	String	No	No	No

Comments

Comments	Displays previously entered comments for this form or correspondence.	String	No	No	No
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Paramedical Form Text

Paramedical Form Text	Will be blank unless the form being viewed is a Paramedical form.	String	No	No	No
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DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Forms History

CI	Document Name
CI-507511 - DSD SC Forms History IMPLEMENTED	DSD_SC_Forms_History.docx

When the History link is selected from a specific form on the Forms list screen, the Forms History list screen for the selected form displays. The default sort order of this screen is by "Last Update & Time" with the most recent record at the top and oldest at the bottom. Forms History is created any time the status of a form is changed.

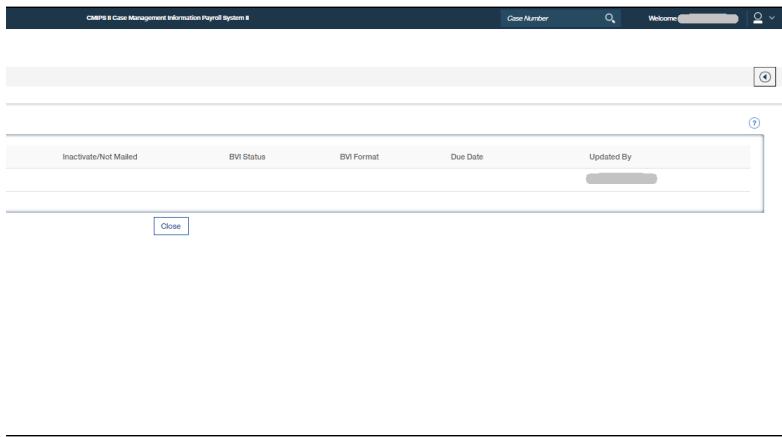


Figure – Forms History

Actions/Functions

The following actions are associated with the Forms History screen:

Action	Function
View Comment	Displays the Comment pop-up for the selected history record.
Print	Displays only when the "Reprint in Another Language" action has been taken and the Status is "Reprinted" or when status is "Suppressed".
<<Previous	Displays the previous 50 history records. This hyperlink is only displayed when there are previous history records for the selected Form screen.
Next >>	Displays the next group of history records (up to 50) for the Form screen. This hyperlink is only displayed when there are additional history records for the selected Form screen.
Close	Closes the screen and displays the View Form screen.

Data Elements

The following data elements are associated with the Forms History screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Language	Language the form was printed in	String	No	No	No
Last Update & Time	The date and time of the last update.	Date Timestamp (MM/DD/YYYY) (HH:MM)	No	No	No

NOA Status	Form Communication Status: <ul style="list-style-type: none">• Pending• Printed• Inactivated• Not Mailed• Suppressed for Wage Rate• Suppressed• Pending Reprint• Reprinted	String	No	No	No
Inactivate / Not Mailed	Indicates if the form was either Inactivated or Not Mailed.	String	No	No	No
BVI Status	BVI Form/Correspondence Generation Type: <ul style="list-style-type: none">• Pending Generation• Generated• Pending Regeneration• Regenerated• Suppressed	String	No	No	No
BVI Format	When the Recipient is indicated as BVI, one of the following will display to indicate the format of the BVI component: <ul style="list-style-type: none">• Audio CD• Data CD• Braille Documents• Large Font Documents• No Accommodation is Needed• N/A• For those Recipients that are not indicated as BVI a space will be displayed	String	No	No	No
Due Date	The Due Date for 3rd party electronic forms sent to ESP.	Date (MM/DD/YYYY)	No	No	No
Updated By	User who updated record	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Forms Comments



When the View Comment link is selected from the Forms History list screen a Comment pop-up, associated with the selected record, displays. When a comment is entered, then saved, there will be no history as the original comment displays on the screen. Any subsequent change will be tracked.

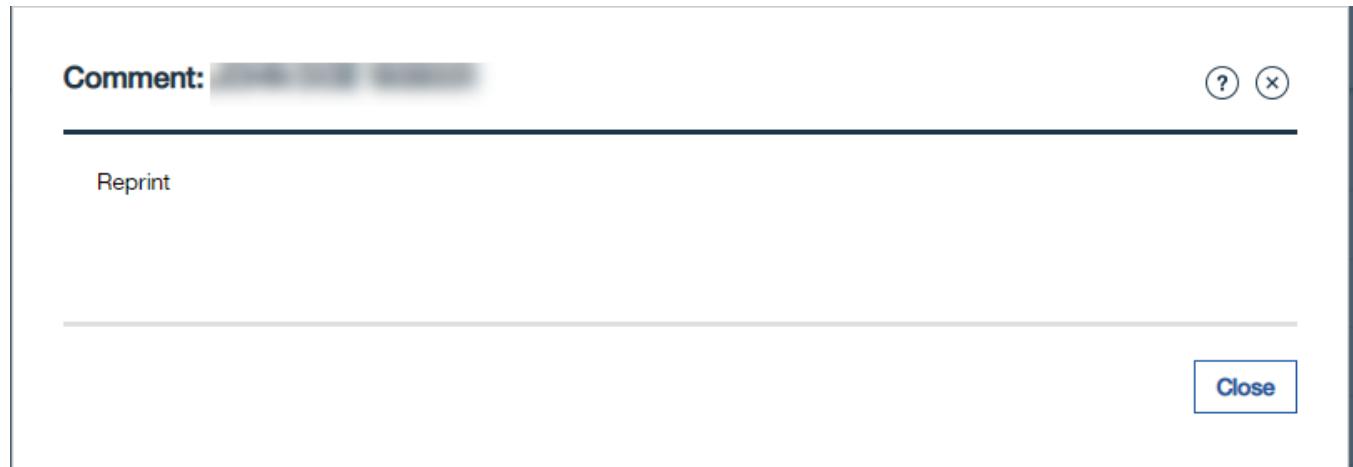


Figure – Comment

Actions/Functions

The following actions are associated with the Comment pop-up:

Action	Function
Close	Closes the pop-up and displays the Forms History list screen

Data Elements

There are no data elements associated with the Comment pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify and Inactivate Form Pop-Up

CI	Document Name
CI-67691 - DSD SC Modify and Inactivate Form Pop-Up IMPLEMENTED	DSD_SC_Modify_and_Inactivate_Form.doc

When the Edit link is selected from the View Form screen, the Modify and Inactivate Form Pop-Up displays. This pop-up is used to take actions or add comments to the specific form. When a BVI NOA Option of Audio CD, Data CD or Braille Documents is associated with the Recipient a BVI NOA cluster displays. This cluster allows the option to regenerate an Audio CD, Data CD, or Braille Document NOA. Large Font NOAs do not display in the BVI NOA cluster and can be reprinted using the existing Print NOA functionality.

The screenshot shows a modal dialog box titled "Modify and Inactivate Form". The top right corner has a question mark icon and a close button. Below the title, there is a note: "* required field". The form fields include:

- Name: [redacted]
- Language: English
- Status: Printed
- Status Date: 10/19/2023
- Mailed:
- Suppress NOA:
- Date: [redacted]
- Notes: SOC 426A - Recipient Designation
Of Provider Form
- Usage: [redacted]
- Language: [dropdown menu]
- Comments: [large text area]
- Comment Text: [text area]

At the bottom are two buttons: "Save" and "Close".

Figure – Modify and Inactivate Form Pop-Up

Actions/Functions

The following actions are associated with the Modify and Inactivate Form Pop-Up:

Action	Function
Save	This action allows the user to save the changes and return to the Forms list screen.
Close	This action allows the user to close the pop-up and return to the Forms list screen. Any unsaved data will be lost.

Data Elements

The following data elements are associated with the Modify and Inactivate Form Pop-Up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Correspondent Detail					
Correspondent Name	Name of the person the form was sent to. Displays in [Firstname Lastname] format.	String	No	No	No
Language	Language the form was printed in	String	No	No	No
Status	Form Communication Status: • Pending • Printed • Inactivated • Not Mailed • Suppressed for Wage Rate • Suppressed • Pending Reprint • Reprinted	String	No	No	No
Status Date	The date associated to the status of the form.	Date (MM/DD/YYYY)	No	No	No
Mark As Inactivate/Not Mailed	Check box requesting the form status to change: • If Status is Pending and box is checked Status will change to Inactivated • If Status is Printed and the box is checked the status will change to Not Mailed	Check Box	No	Unselected	Yes
Suppress NOA	Check box requesting suppression of a NOA	Check Box	No	Unselected	Yes, until the NOA status is Suppressed.
Electronic Form Due Date	The Due Date for 3rd party electronic forms sent to ESP.	Date (MM/DD/YYYY)	No	No	No
Form Name	Form number and name	String	No	No	No
BVI Format Detail – This cluster will only appear if the Form/Correspondence was also generated as Audio CD, Data CD or Braille Documents. It will also display for Large Font correspondence that is created by an outside vendor.					
Option	The format of the BVI component: • Audio CD • Data CD • Braille Document • Large Font Documents	String	No	No	No
Regenerate	When selected, regenerates selected BVI component in the Recipient's indicated BVI Option	Check Box	No	Unselected	Yes
Status	BVI Forms/Correspondence Generation Type: • Pending Generation • Generated • Pending Regeneration • Regenerated • Suppressed • Mailed	String	No	No	No
Status Date	The date associated to the status of the BVI component.	Date (MM/DD/YYYY)	No	No	No
Reprint in Another Language					
Language	Allows the user to select the written language in which the NOA should be reprinted. This field allows the user to reprint the NOA in a different language up to twice.	Drop-down	No	No	Yes
Comments					
Comments ¹	Freeform text area to enter comments associated to this form	String	No, unless "Suppress NOA" is indicated.	No	Yes
Paramedical Form Text					

Paramedical Form Text	Text to be printed in the "Additional Comments" section of the Paramedical Services Form.	String	No. Is only allowed when SOC 321 is printed.	No	No
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¹ Comments – limited to 200 characters

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Case Notes

CI	Document Name
CI-67684 - DSD SC Case Notes IMPLEMENTED	DSD_SC_Case_Notes.doc

When the Notes Page Navigation is selected from the Case Home Content Tab the Case Notes list screen displays.

	Text	Sensitivity	Priority	Status
9	testing today	1	Medium	Active
9	testing	1	Low	Cancelled
9	testing again	1	Medium	Active
3	NON-REGISTRY: PROVIDER COMPLETED ENROLLMENT REQUIREMENTS. Assigned to LINKING TEAM. All required en...	1	Medium	Active
9	Recipient completed Provider Assignment using the ESP; Provider Number: 002839101 Provider Name: MA...	1	Medium	Active
3	Ref ticket 512673 OA researched and IP MARIAM SAMAAAN forms located in SharePoint 19861001 Samaan.	1	Medium	Active

Figure – Case Notes

Actions/Functions

The following actions are associated with the Case Notes list screen:

Action	Function
New	Displays the Create Note pop-up.
Print Case Notes Form	Displays the Print Case Notes Form pop-up, where the form can be selected for printing.
View	Displays the View Note screen for the selected note.
Edit	Displays the Modify Note pop-up for the selected note.
Entered By	Displays the User Home screen for the listed user.

Data Elements

The following data elements are associated with the Case Notes screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Entered By	First and Last name associated with the user	String	No	No	No
Creation Date	Date and Time the note was entered.	Date Time (MM/DD/YYYY) (HH:MM)	No	No	No
Text	Note Text	String	No	No	No
Sensitivity	Sensitivity of the note	Integer	No	No	No
Priority	Case note priority	String	No	No	No

Status	Case not status	String	No	No	No
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DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Print Case Notes Form

CI	Document Name
CI-67709 - DSD SC Print Case Notes Form IMPLEMENTED	DSD_SC_Print_Case_Notes_Form.doc

When the Print Case Notes Form link is selected from the Case Notes screen, the Print Case Notes Form pop-up displays.

The screenshot shows a modal dialog titled "Print Case Notes Form". Inside, there's a "Details" section with two date pickers labeled "Creation From Date" and "Creation To Date". Below these is a dropdown menu for "Print" with the option "Print in Nightly Batch" selected. At the bottom right of the dialog are "Save" and "Cancel" buttons.

Figure – Print Case Notes Form

Actions/Functions

The following actions are associated with the Print Case Notes Form pop-up:

Action	Function
Save	Saves the entered data and prints the case notes as indicated and displays the Case Notes list screen.
Cancel	Cancels the request, closes the screen and displays the Case Notes list screen.

Data Elements

The following data elements are associated with the Print Case Notes Form pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Creation From Date	The first Creation Date to be included in the notes being printed. Displays in M/DD/YYYY	Date	Yes	No	Yes
Creation To Date	The last Creation Date to be included in the notes being printed. Displays in M/DD/YYYY	Date	Yes	No	Yes
Print	Allows the user to indicate the print method.	Drop-down	Yes	Print in Nightly Batch	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Session Inactivity - Session Expired



When a CMIPS Application session has expired, the informational Session Inactivity - Session Expired pop-up message is displayed. The message indicates the date and time the session expired and instructs the user to sign-in again.

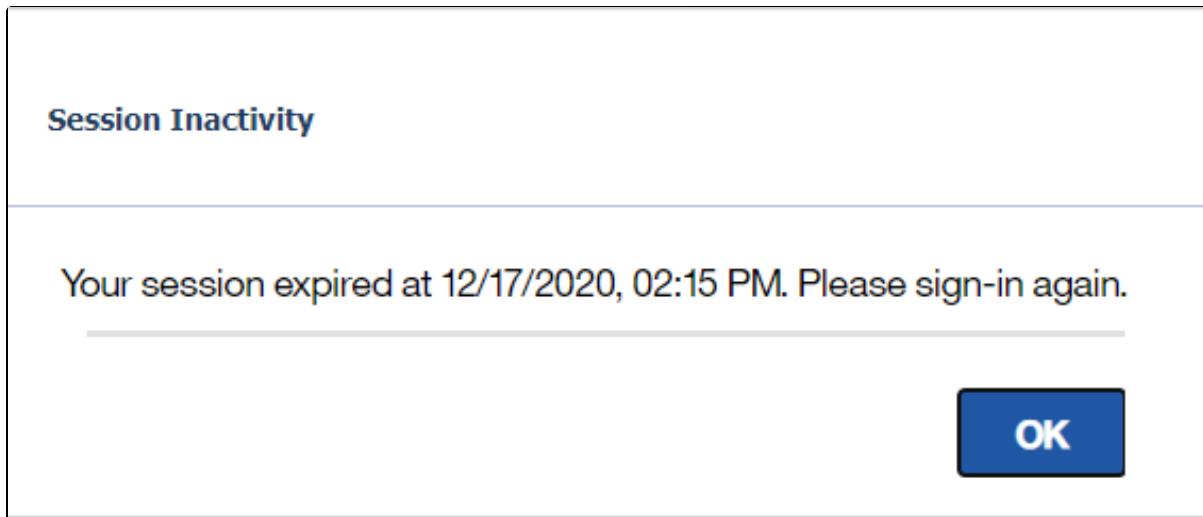


Figure – Session Inactivity - Session Expired

Actions/Functions

The following actions are associated with the Session Inactivity - Session Expired pop-up:

Action	Function
OK	Acknowledges the Session Inactivity pop-up message was seen by a user and takes the user to the Timed-out screen.

Data Elements

The following data elements are associated with the Session Inactivity - Session Expired pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
<Session Expiration Date Time>	The date time that the user's session expired displayed in MM/DD/YYYY, HH:MM <AM/PM> format.	Date Time	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Medi-Cal Eligibility

CI	Document Name
CI-444535 - DSD SC Modify MediCal Eligibility IMPLEMENTED	DSD_SC_Modify_MediCal_Eligibility.doc

When the Edit action is selected on the View Medi-Cal Eligibility pop-up, the Modify Medi-Cal Eligibility screen displays. This screen is only accessible by a user a MEDSMODIFY security role. This access is not available for county users.

The screenshot shows a form titled "Modify Medi-Cal Eligibility". It includes fields for Last Updated (08/21/2013 08:25), Record Type (FFP checked), BIC Issue Date (02/18/2005), Medi-Cal County Serial, County Person Number, Medi-Cal Date of Birth (08/01/1972), Medi-Cal Denial Reason, Medi-Cal Denial Date, Refugee Alien Status, INS Date Of Entry, Identity Document Type, Citizenship Document Type, RV Due Month, and Last RV Completed Date. At the bottom are "Save" and "Cancel" buttons.

Figure – Modify Medi-Cal Eligibility

Actions/Functions

The following actions are associated with the Modify Medi-Cal Eligibility pop-up:

Action	Function
Save	Saves updates to the screen
Cancel	Cancels the screen and displays the View Medi-Cal Eligibility screen

Data Elements

The following data elements are associated with Modify Medi-Cal Eligibility Information screen.

Field Name	Help	Date Type	Required Indicator	Default Value	Editable Field
Eligibility Month /Year	Field requires entry in MM/DD/YYYY format, but when the screen is saved the field displays as MM/YYYY on the View Medi-Cal Eligibility screen	Date	No	No	Yes
Last Updated	Last Updated MM/DD/YYYY HH:MM	Date Time	No	No	No
Medi-Cal Eligibility Status	Medi-Cal Eligibility Status	String	No	No	Yes

Record Type	Record Type		String	No	No	No
Medi-Cal Aid Code	Medi-Cal Aid Code (two digit entry)		String	No	No	Yes
FFP	If box is checked, FFP displays a Y, if box is unchecked FFP displays as N when the save action displays the View Medi-Cal Eligibility Screen		Check Box	No	No	Yes
Medi-Cal Share of Cost	Medi-Cal Share of Cost		Number	No	No	No
BIC Issue Date	BIC Issue Date MM/DD/YYYY		Date	No	No	Yes
Medi-Cal County ID	Medi-Cal County ID – User selects County from drop-down. When screen is save this field will displays as the County Code.		Drop-Down	No	No	Yes
Medi-Cal County Serial	Medi-Cal County Serial – Field limit 7 numeric characters		String	No	No	Yes
County FBU	County FBU – Field limit one (1) numeric character		Number	No	No	Yes
County Person Number	County Person Number – Field limit two (2) numeric characters		Number	No	No	Yes
MEDS ID	MEDS ID – Field limit nine (9) alpha numeric characters		Number	No	No	Yes
Medi-Cal Date of Birth	Medi-Cal Date of Birth MM/DD/YYYY		Date	No	No	No
SSN Verification Code	SSN Verification Code		String	No	No	No
Medi-Cal Denial Reason	Medi-Cal Denial Reason		String	No	No	No
SSI Living Arrangement	SSI Living Arrangement		String	No	No	No
Medi-Cal Denial Date	Medi-Cal Denial Date MM/DD/YYYY		Date	No	No	No
Optional Living Arrangement	Optional Living Arrangement		String	No	No	No
Refugee Alien Status	Refugee – Alien Status		String	No	No	No
Date of Death	Death Date MM/DD/YYYY		Date	No	No	No
INS Date Of Entry	INS Date of Entry MM/YYYY		Date	No	No	No
Death Source	Death Source		String	No	No	No
Identity Document Type	Identity Document Type		String	No	No	No
CIN	CIN + Check Digit		String	No	No	No
Citizenship Document Type	Citizenship Document Type		String	No	No	No
Disability Onset Date	Disability Onset Date MM/DD/YYYY		Date	No	No	No
RV Due Month	The Month in which the next Medi-Cal Review is due (MM/YYYY)		Number (01-12)	No	No	No
Application Date	Medi-Cal Application Date (MM/DD/YYYY)		Date	No	No	No
Last RV Completed Date	Last RV Completed Date MM/YYYY		Date	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Overtime Agreement

CI	Document Name
CI-480922 - DSD SC Recipient Overtime Agreement IMPLEMENTED	DSD_SC_Recipient_Overtime_Agreement.doc

When Recipient Overtime Agreement Navigation Page Tab is selected from the Overtime & Travel Content Tab the Recipient Overtime Agreement list screen displays.

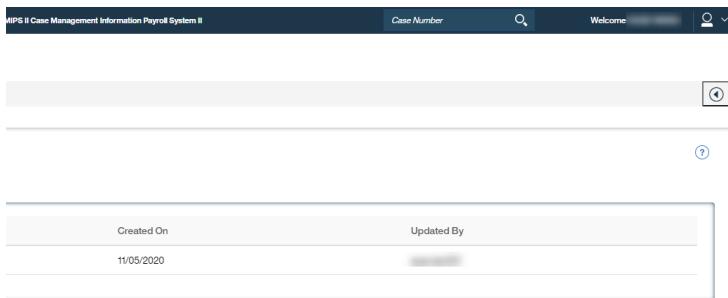


Figure – Recipient Overtime Agreement

Actions/Functions

The following actions are associated with the Recipient Overtime Agreement list screen:

Action	Function
New	Displays the Create Recipient Overtime Agreement pop-up.
View	Displays the View Recipient Overtime Agreement screen.

Data Elements

The following data elements are associated with the Recipient Overtime Agreement list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Received Date	The user entered date the form was received. Displays in MM/DD/YYYY format.	Date	No	No	No
Created On	The date on which the Recipient Overtime Agreement was created. Displays in MM /DD/YYYY format.	Date	No	No	No
Updated By	The User ID of the individual who entered the data	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Recipient Overtime Agreement

CI	Document Name
CI-480921 - DSD SC Create Recipient Overtime Agreement IMPLEMENTED	DSD_SC_Create_Recipient_Overtime_Agreement.doc

When the New link is selected from the Recipient Overtime Agreement list screen the Create Recipient Overtime Agreement pop-up displays.

The screenshot shows a modal dialog box titled "Create Recipient Overtime Agreement". Inside the dialog, there is a red asterisk (*) followed by the text "required field". Below this is a dropdown menu. At the bottom of the dialog are two buttons: "Save" and "Cancel".

Figure – Create Recipient Overtime Agreement

Actions/Functions

The following actions are associated with the Create Recipient Overtime Agreement pop-up:

Action	Function
Save	When the Save link is selected the data is saved and the Recipient Overtime Agreement list screen displays
Cancel	When the Cancel link is selected the data is not saved and the Recipient Overtime Agreement list screen displays

Data Elements

The following data elements are associated with the Create Recipient Overtime Agreement pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Date Received	Allows user to select or enter a date the form was received. This date may not be before 11/1/2014 and it may not be a future date. Displays in MM /DD/YYYY format.	Date	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Recipient Overtime Agreement

CI	Document Name
CI-480926 - DSD SC View Recipient Overtime Agreement IMPLEMENTED	DSD_SC_View_Recipient_Overtime_Agreement.doc

If the View link is selected for a Recipient Overtime Agreement on the Recipient Overtime Agreement list screen, the View Recipient Overtime Agreement screen displays. When the Save link is selected on the "Create Recipient Overtime Agreement" pop-up the "View Recipient Overtime Agreement" screen displays.

The screenshot shows a web-based application interface. At the top, there's a dark header bar with the text 'CPS II Case Management Information Payroll System II'. To the right of the header are links for 'Case Number', a magnifying glass icon for search, 'Welcome [redacted]', and a user profile icon with a dropdown arrow. The main content area is mostly blank with a few UI elements: a small circular icon in the top right, a question mark icon in the center, and a dropdown arrow. At the bottom, there are two buttons: 'Inactivate...' and 'Close'.

Figure – View Recipient Overtime Agreement

Actions/Functions

The following actions are associated with the View Recipient Overtime Agreement screen:

Action	Function
Inactivate	When the Inactivate link is selected the "Inactivate Recipient Overtime Agreement" confirmation pop-up displays.
Close	Returns user to the Recipient Overtime Agreement list screen

Data Elements

The following data elements are associated with the View Recipient Overtime Agreement screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Date Received	Displays the date the form was received. Displays in MM/DD/YYYY format.	Date	No	No	No
Created On	The date on which the Recipient Overtime Agreement record was created. Displays in MM/DD/YYYY format.	Date	No	No	No
Updated By	The User ID of the individual who created the Recipient Overtime Agreement	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactivate Recipient Overtime Agreement

CI	Document Name
CI-480918 - DSD SC Inactivate Recipient Overtime Agreement IMPLEMENTED	DSD_SC_Inactivate_Recipient_Overtime_Agreement.doc

When the Inactivate link is selected from the View Recipient Overtime Agreement screen the Inactivate Recipient Overtime Agreement confirmation pop-up displays.



Figure – Inactivate Recipient Overtime Agreement

Actions/Functions

The following actions are associated with the Inactivate Recipient Overtime Agreement pop-up:

Action	Function
Yes	When the Yes link is selected the row will no longer display and the user is returned to the Recipient Overtime Agreement screen displaying the "New" link.
No	Cancels the action and displays the Recipient Overtime Agreement screen.

Data Elements

There are no data elements on the Inactivate Recipient Overtime Agreement pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Workweek Agreement

CI	Document Name
CI-480925 - DSD SC Recipient Workweek Agreement [IMPLEMENTED]	DSD_SC_Recipient_Workweek_Agreement.doc

When the Recipient Workweek Agreement Navigation Page Tab is selected from the Overtime & Travel Content Page, the Recipient Workweek Agreement list screen displays. This screen displays all "Active" status Recipient Workweek Agreements. If a Recipient has both IHSS and WPCS hours and a Provider is both an IHSS and WPCS Provider, for the Recipient, the Provider will be listed twice if there are "Active" Recipient Workweek Agreements for both IHSS and WPCS. The secondary sort is by Provider name (Last Name, First Name).

The screenshot shows a web-based application interface for case management. At the top, there is a header bar with the text 'MIPS II Case Management Information Payroll System II', a search bar labeled 'Case Number' with a magnifying glass icon, and a 'Welcome' message with a dropdown arrow. Below the header is a navigation menu with a circular icon containing a question mark. The main content area displays a table titled 'Recipient Workweek Agreement'. The table has columns for 'Hours', 'Weekly', 'Begin Date', 'End Date', 'Updated By', 'Updated Date', 'Status', and 'Provider Work Week Agreement'. One row is visible, showing '00:00' in the Hours column, '10/23/2020' in the Begin Date column, and '12/31/9999' in the End Date column. The Status column shows 'Active' and the Provider Work Week Agreement column shows a link labeled 'Yes'.

Figure – Recipient Workweek Agreement

Actions/Functions

The following actions are associated with the Recipient Workweek Agreement screen:

Action	Function
New	Displays the Create Recipient Workweek Agreement pop-up
View Inactive History	Displays the Recipient Workweek Agreement Inactive History screen which lists of all records in "Inactive" status associated with the Recipient case. This link will only display if there are "Inactive" Recipient Workweek Agreement records associated to the case.
View	Displays the View Recipient Workweek Agreement screen
Edit	Displays the Modify Recipient Workweek Agreement pop-up
Yes	Displays the Provider Workweek Agreement screen with the most recent "Active" status Provider Workweek Agreement

Data Elements

The following data elements are associated with the Recipient Workweek Agreement screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Provider Name	Provider Name. (Last Name, First Name)	String	No	No	No
Provider Number	Provider Number	String	No	No	No
Provider Type	Indicates the Workweek Agreement Type (IHSS or WPCS) based upon which program the Provider is assigned	String	No	No	No
Total Hours	The number of hours indicated on the Recipient Workweek Agreement screen. Displays in an HH:MM format	Integer	No	No	No

Weekly	The number of hours the Recipient has indicated the Provider works on a weekly basis	Integer (HH:MM)	No	No	No
Begin Date	The Begin Date for the Recipient Workweek Agreement record. Displays in MM/DD/YYYY format.	Date	No	No	No
End Date	The End Date for the Recipient Workweek Agreement. This date will be the system high date (12/31/9999). Displays in MM/DD/YYYY format.	Date	No	No	No
Updated By	The User ID of the user who created or modified the Recipient Workweek Agreement.	String	No	No	No
Updated Date	The date Workweek Agreement screen was last updated. Displays in MM/DD/YYYY format.	String	No	No	No
Status	The Recipient Workweek Agreement Status. Will always display "Active".	String	No	No	No
Provider Workweek Agreement	For the Provider a, "Yes", indicates an "Active" Provider Workweek Agreement exists. "No" indicates that either an "Inactive" Provider Workweek Agreement exist or there is no Provider Workweek Agreement.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Recipient Workweek Agreement

CI	Document Name
CI-480916 - DSD SC Create Recipient Workweek Agreement IMPLEMENTED	DSD_SC_Create_Recipient_Workweek_Agreement.doc

When the New link is selected from the Recipient Workweek Agreement screen the Create Recipient Workweek Agreement pop-up displays. This pop-up allows data entry from the IN-HOME SUPPORTIVE SERVICES PROGRAM RECIPIENT AND PROVIDER WORKWEEK AGREEMENT (SOC 2256).

The screenshot shows a modal dialog titled "Workweek Agreement: [REDACTED]". The form includes:

- A required field indicator (*).
- A large text area for entering work hours.
- A weekly schedule grid with time inputs for each day of the week (Sunday through Saturday).
- A "Total Hours (HH:MM)" field showing "00h : 00m".
- Provider selection fields: "Provider Name:" with a dropdown and search icon, and "Provider Type:" with a dropdown.
- A "Recipient Weekly Authorized Hours:" field showing "15:58".
- Action buttons at the bottom: "Save" and "Cancel".

Figure – Create Recipient Workweek Agreement

Actions/Functions

The following actions are associated with the Create Recipient Workweek Agreement pop-up:

Action	Function
Save	Saves data on the screen and returns user to Recipient Workweek Agreement list screen
Cancel	Cancels the action and returns user to Recipient Workweek Agreement list screen
Provider Name	Displays the Select Provider screen. Allows user to select the Provider for which the Recipient has submitted a Workweek Agreement.

Data Elements

The following data elements are associated with the Create Recipient Workweek Agreement pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					

Begin Date	The Begin Date for the Recipient Workweek Agreement record. Displays in MM/DD/YYYY format.	Date	Yes	No	Yes
Time Entries					
Weekly	The number of hours the Recipient has indicated the Provider works on a weekly basis	Integer (HH: MM)	Yes, if no daily hours fields are populated	No	Yes
Sunday Monday Tuesday Wednesday Thursday Friday Saturday	The daily hours indicated on the Recipient Workweek Agreement. At least one daily time entry is required.	Integer (HH: MM)	Yes, at least one daily hours field must be entered if Weekly is not indicated	No	Yes
Total Hours	Populated in HH:MM format based upon the user entry in the Sunday through Saturday time fields or by entry of Weekly	Integer (HH: MM)	Yes, will update as Time Entries are keyed.	No	No
Back-Up Provider	Selectable by user when Provider is a Back-Up Provider	Checkbx	No	Un-checked	Yes
Provider Type	Indicates IHSS or WPCS Provider based upon the selected Provider	Drop Down	Yes	No	Yes
Recipient Weekly Authorized Hours	Displays the Recipient Weekly Authorized Hours from the Weekly Authorized Hours field on the Authorization Summary screen.	Integer (HH: MM)	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs>Select Provider

CI	Document Name
CI-480919 - DSD SC Select Provider Pop up IMPLEMENTED	DSD_SC_Select_Provider_Pop_up.doc

When the "Provider Name" search link is selected from the "Create Recipient Workweek Agreement" screen the "Select Provider" pop up displays. This pop-up displays the names of all Providers (regardless of current status) linked to a Recipient case. Sort order will be by Provider Type, then Status (Active, On-Leave, and Terminated) and then by Provider Name (Last Name, First Name).

Provider:	(?) (x)			
Provider Number	Provider Name	Provider Status	Provider Type	
1234567890	John Doe	Active	IHSS	
9876543210	Jane Smith	Active	WPCS	

Figure – Select Provider

Actions/Functions

The following actions are associated with the Select Provider pop-up:

Action	Function
Close	Cancels the action and returns the user to the Create Recipient Workweek Agreement screen
Select	Returns the user to the Create Recipient Workweek Agreement screen populating Provider Name field with the selected Provider.

Data Elements

The following data elements are associated with the Select Provider pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Provider Name	Provider Name (Last Name, First Name)	String	No	No	No
Provider Number	Provider Number	String	No	No	No
Provider Type	Indicates either IHSS or WPCS	String	No	No	No
Provider Status	Indicates the Provider current status to the Recipient case. A Provider in Terminated status cannot be selected.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Recipient Workweek Agreement

CI	Document Name
CI-480927 - DSD SC Modify Recipient Workweek Agreement IMPLEMENTED	DSD_SC_Modify_Recipient_Workweek_Agreement.doc

When the Edit link associated with a Recipient Workweek Agreement on the Recipient Workweek Agreement list screen or the Edit link on the View Recipient Workweek Agreement screen is selected the Modify Recipient Workweek Agreement pop-up displays.

The screenshot shows a modal dialog titled "Modify Recipient Workweek Agreement". It contains the following fields:

- Date: 10/23/2020
- End Date: 12/31/9999
- Weekly Work Schedule (grid):

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
02 : 00	02 : 00	00 : 00	00 : 00	00 : 00	00 : 00	00 : 00
- Total Hours (HH:MM): 04h : 00m
- Provider Information:

<input type="checkbox"/>	Provider Name: (redacted)	Provider Type: IHSS	Recipient Weekly Authorized Hours: 04:38
--------------------------	---------------------------	---------------------	--
- Buttons: Save, Cancel

Figure – Modify Recipient Workweek Agreement

Actions/Functions

The following actions are associated with the Modify Recipient Workweek Agreement pop-up:

Action	Function
Save	Data is saved and user is returned to the Recipient Workweek Agreement list screen.
Cancel	Does not save data and user is returned to Recipient Workweek Agreement list screen.

Data Elements

The following data elements are associated with the Modify Recipient Workweek Agreement pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Begin Date	The Begin Date for the Recipient Workweek Agreement record. Displays in MM/DD/YYYY format.	Date	No	No	No

End Date	The End Date for the Recipient Workweek Agreement. This date will be the system high date (12/31/9999). Displays in MM/DD /YYYY format.	Date	No	No	No
Time Entries [HH:MM]					
Weekly	The number of hours the Recipient has indicated the Provider works on a weekly basis	Integer (HH:MM)	Yes, if no daily hours fields are populated	No	Yes
Sunday	The daily hours claimed on the Recipient Workweek Agreement in an HH:MM format.	Integer (HH:MM)	Yes, at least one daily hours field must be entered.	No	Yes
Monday	At least one daily time entry is required.				
Tuesday					
Wednesday					
Thursday					
Friday					
Saturday					
Total Hours	Total of the Sunday – Saturday entries as they are keyed.	Integer (HH:MM)	Yes, populated as Time Entries are keyed	No	No
Provider Name	Provider Name (Last Name, First Name)	String	No	No	No
Back-Up Provider	Selectable by user when provider is a Back-Up Provider.	Check box	No	Previous indication by user from either the Create or Modify Recipient Workweek Agreement	Yes
Provider Type	Indicates IHSS or WPCS Provider based upon the selected Provider	String	Yes	No	No
Recipient Weekly Authorized Hours	Displays the Recipient Weekly Authorized Hours from the Weekly Authorized Hours field on the Authorization Summary screen.	Integer (HH:MM)	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Recipient Workweek Agreement

CI	Document Name
CI-480917 - DSD SC View Recipient Workweek Agreement IMPLEMENTED	DSD_SC_View_Recipient_Workweek_Agreement.doc

When the View link associated with an individual Provider is selected from the Recipient Workweek Agreement screen the View Recipient Workweek Agreement displays.

Figure – View Recipient Workweek Agreement

Actions/Functions

The following actions are associated with the View Recipient Workweek Agreement screen:

Action	Function
Inactivate	Displays the Inactivate Recipient Workweek Agreement confirmation pop-up
History	Displays the Recipient Workweek Agreement History pop-up
Edit	Displays the Modify Recipient Workweek Agreement pop-up
Close	Returns user to Recipient Workweek Agreement list screen

Data Elements

The following data elements are associated with the View Recipient Workweek Agreement screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Begin Date	The Begin Date for the Recipient Workweek Agreement record. Displays in MM/DD/YYYY format.	Date	No	No	No
End Date	The End Date for the Recipient Workweek Agreement. This date will be the system high date (12/31/9999). Displays in MM/DD/YYYY format.	Date	No	No	No
Time Entries [HH:MM]					
Weekly	The number of hours the Recipient has indicated the Provider works on a weekly basis	Integer (HH:MM)	No	No	No

Sunday	The daily hours claimed on the Provider Workweek Agreement in an HH:MM format.	Integer (HH:MM)	No	No	No
Monday	At least one daily time entry is required.				
Tuesday					
Wednesday					
Thursday					
Friday					
Saturday					
Total Hours	The Total Hours currently entered on the Recipient Workweek Agreement.	Integer (HH:MM)	No	No	No
Provider Name	Provider Name (Last Name, First Name)	String	No	No	No
Back-Up Provider	User indication of whether or not the Provider is a Back-Up Provider	String	No	No	No
Provider Type	Indicates IHSS or WPCS Provider based upon the selected Provider	String	No	No	No
Recipient Weekly Authorized Hours	Displays the Recipient Weekly Authorized Hours from the Weekly Authorized Hours field on the Authorization Summary screen.	Integer (HH:MM)	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Workweek Agreement History

CI	Document Name
CI-480928 - DSD SC Recipient Workweek Agreement History IMPLEMENTED	DSD_SC_Recipient_Workweek_Agreement_History.doc

When the History link is selected from the View Recipient Workweek Agreement screen the Recipient Workweek Agreement History pop-up displays for the selected Provider. The most recent data displays on the View Recipient Workweek Agreement screen and rows are added to history screen as changes are made using the Modify Recipient Workweek Agreement pop-up.

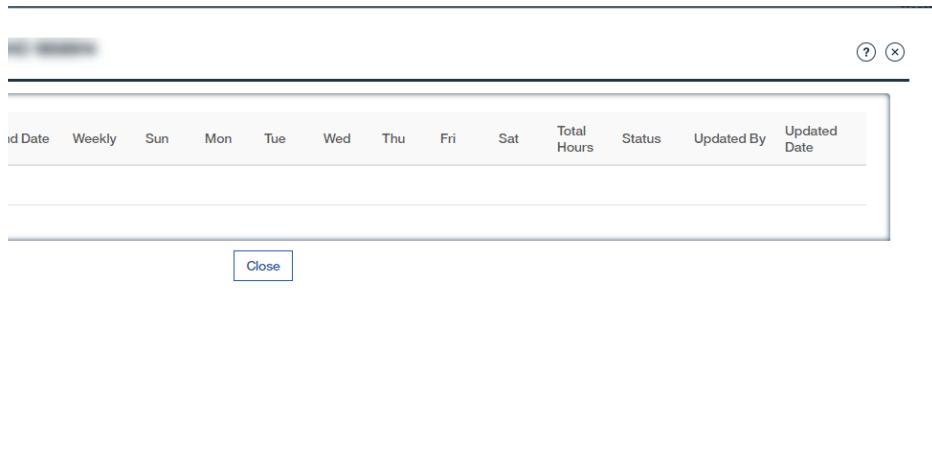


Figure - Recipient Workweek Agreement History

Actions/Functions

The following actions are associated with the Recipient Workweek Agreement History pop-up:

Action	Function
Close	Displays the View Recipient Workweek Agreement screen.

Data Elements

The following data elements are associated with the Recipient Workweek Agreement History pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Provider Name	Display the Provider Name associated with the History record (Last Name, First Name)	String	No	No	No
Provider Number	Display the Provider Number associated with the History record	String	No	No	No
Provider Type	Indicates either IHSS or WPCS	String	No	No	No
Begin Date	The Begin Date for the Recipient Workweek Agreement record. Displays in MM/DD/YYYY format.	Date	No	No	No
End Date	The End Date for the Recipient Workweek Agreement. This date will be the system high date (12/31/9999). Displays in MM/DD/YYYY format.	Date	No	No	No
Weekly	The weekly Recipient Workweek Agreement hours.	Integer (HH:MM)	No	No	No
Sun Mon Tue Wed Thu Fri Sat	The daily hours indicated on the Recipient Workweek Agreement.	Integer (HH:MM)	No	No	No
Total Hours	The Total Recipient Workweek Agreement hours.	Integer (HH:MM)	No	No	No

Status	The status of the Recipient Workweek Agreement record.	String	No	No	No
Updated By	Displays the user name of the individual who update the Modify Recipient Workweek Agreement screen.	String	No	No	No
Updated Date	Date the Modify Recipient Workweek Agreement screen was updated. Displays in MM/DD/YYY format.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactivate Recipient Workweek Agreement Confirmation

CI	Document Name
CI-480924 - DSD SC Inactivate Recipient Workweek Agreement IMPLEMENTED	DSD_SC_Inactivate_Recipient_Workweek_Agreement.doc

When the Inactivate link is selected from the View Recipient Workweek Agreement screen the Inactivate Recipient Workweek Agreement confirmation pop-up displays.

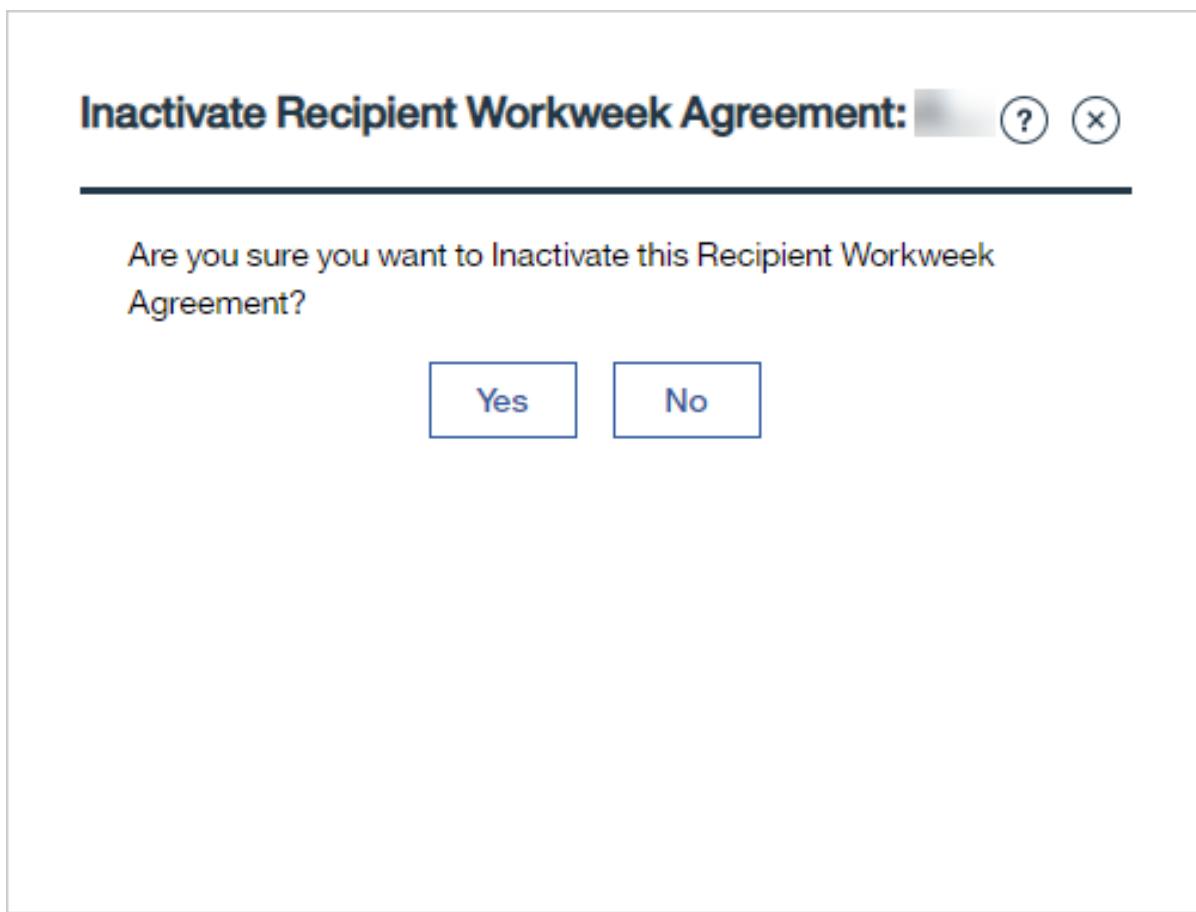


Figure – Inactivate Recipient Workweek Agreement

Actions/Functions

The following actions are associated with the Inactivate Recipient Workweek Agreement pop-up:

Action	Function
Yes	When the Yes link is selected the user is returned to the Recipient Workweek Agreement screen and the row for the inactivated workweek agreement will no longer display.
No	Cancels the action and displays the View Recipient Workweek Agreement screen.

Data Elements

There are no data elements associated with the Inactive Recipient Workweek Agreement pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactive Recipient Workweek Agreement History

CI	Document Name
 CI-480923 - DSD SC Inactive Recipient Workweek Agreement History IMPLEMENTED	DSD_SC_Inactive_Recipient_Workweek_Agreement_History.doc

When the View Inactive History link is selected from the Recipient Workweek Agreement screen the Inactive Recipient Workweek Agreement History screen displays. Default sort is by Updated Date with the most recent at the top.

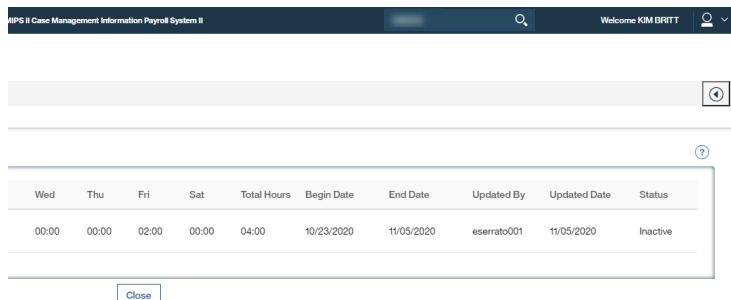


Figure – Inactive Recipient Workweek Agreement History

Actions/Functions

The following actions are associated with the Inactive Recipient Workweek Agreement History screen:

Action	Function
<<Previous	Displays the previous 50 history records. This hyperlink is only displayed when there are previous history records for the selected Inactive Recipient Workweek Agreement screen.
Next>>	Displays the next group of history records (up to 50) for the Inactive Recipient Workweek Agreement screen. This hyperlink is only displayed when there are additional history records for the selected Inactive Recipient Workweek Agreement screen.
Close	Displays the Recipient Workweek Agreement screen.
View	Displays the View Inactive Recipient Workweek Agreement History screen

Data Elements

The following data elements are associated with the Inactive Recipient Workweek Agreement History screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Provider Name	Display the Provider Name associated with the History record (Last Name, First Name)	String	No	No	No
Provider Type	Indicates either IHSS or WPCS	String	No	No	No
Weekly	The number of hours the Recipient has indicated the Provider works on a weekly basis	Integer (HH:MM)	No	No	No

<ul style="list-style-type: none"> • Sun • Mon • Tues • Wed • Thu • Fri • Sat 	The daily hours indicated on the Recipient Workweek Agreement.	Integer (HH:MM)	No	No	No
Total Hours	The Total Recipient Workweek Agreement hours.	Integer (HH:MM)	No	No	No
Begin Date	The Begin Date of the workweek agreement. Displays in MM/DD/YYYY format.	Date	No	No	No
End Date	The date on which the workweek agreement was inactivated. Displays in MM/DD/YYYY format.	Date	No	No	No
Updated By	Displays the user name of the individual who update the Modify Recipient Workweek Agreement screen.	String	No	No	No
Updated Date	Date the Modify Recipient Workweek Agreement screen was updated. Displays in MM/DD/YYYY format.	String	No	No	No
Status	The status of the Recipient Workweek Agreement record.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Inactive Recipient Workweek Agreement History

CI	Document Name
CI-480920 - DSD SC View Inactive Recipient Workweek Agreement History IMPLEMENTED	DSD_SC_View_Inactive_Recipient_Workweek_Agreement_History.doc

When the View link is selected for a record on the Inactive Recipient Workweek Agreement History screen the View Inactive Recipient Workweek Agreement History screen displays.

Figure – View Inactive Recipient Workweek Agreement History

Actions/Functions

The following actions are associated with the View Inactive Recipient Workweek Agreement History screen:

Action	Function
Close	Returns user to Inactive Recipient Workweek Agreement History screen

Data Elements

The following data elements are associated with the View Inactive Recipient Workweek Agreement History screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Begin Date	The Begin Date of the workweek agreement. Displays in MM/DD/YYYY format.	Date	No	No	No
End Date	The date on which the workweek agreement was inactivated. Displays in MM/DD/YYYY format.	Date	No	No	No
Time Entries [HH:MM]					
Weekly	The number of hours the Recipient has indicated the Provider works on a weekly basis	Integer (HH:MM)	No	No	No

<ul style="list-style-type: none"> • Sunday • Monday • Tuesday • Wednesday • Thursday • Friday • Saturday 	<p>The daily hours claimed on the Provider Workweek Agreement in an HH:MM format. At least one daily time entry is required.</p>	<p>Integer (HH: MM)</p>	No	No	No
Total Hours	The Total Hours currently entered on the Recipient Workweek Agreement.	<p>Integer (HH: MM)</p>	No	No	No
Provider Name	Provider Name (Last Name, First Name)	<p>String</p>	No	No	No
Back-Up Provider	User indication of whether or not the Provider is a Back-Up Provider	<p>String</p>	No	No	No
Provider Type	Indicates IHSS or WPCS Provider based upon the selected Provider	<p>String</p>	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Blind or Visually Impaired

CI	Document Name
CI-486312 - DSD SC Blind or Visually Impaired IMPLEMENTED	DSD_SC_Blind_or_Visually_Impaired.docx

When the Blind or Visually Impaired Navigation Page Tab is selected from the Case Home Content Tab, the Blind or Visually Impaired screen displays. This screen displays the current, active BVI record associated with the case.

Action Option	IHSS Required Forms Option	IHSS Required Forms Option Language	Created By	From	To
No Accommodation is Needed	Case Management			11/16/2020 17:37	12/31/9999 12:00

Figure – Blind or Visually Impaired

Actions/Functions

The following actions are associated with the Blind or Visually Impaired screen:

Action	Function
New	Displays the Create Blind or Visually Impaired pop-up.
History	Displays the Blind or Visually Impaired History screen.
View	Displays the View Blind or Visually Impaired screen.
Edit	Displays the Modify Blind or Visually Impaired pop-up.

Data Elements

The following data elements are associated with the Blind or Visually Impaired screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Blind or Visually Impaired	The Recipient's impairment indication of Blind or Visually Impaired.	String	No	No	No
Notice of Action Option	The delivery method the Recipient has indicated for NOAs.	String	No	No	No
Notice of Action Option Language	The language in which the BVI NOA was generated.	String	No	No	No
IHSS Required Forms Option	The delivery method the BVI Recipient has indicated for their correspondence. Note: This field is used to capture information only and is not tied to system functionality at this time.	String	No	No	No
IHSS Required Forms Option Language	The language in which the BVI IHSS Required Form was generated.	String	No	No	No

Created By	The user name of the user who created the BVI record.	String	No	No	No
From	The date and time the Blind or Visually Impaired record was created. Displays in MM/DD/YYYY HH:MM.	Date Timestamp	No	No	No
To	The date and time the Blind or Visually Impaired record became inactive. Note: For current, active BVI Record To date will display "12/31/9999 12:00."	Date Timestamp	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Blind or Visually Impaired

CI	Document Name
CI-486315 - DSD SC Create Blind or Visually Impaired IMPLEMENTED	DSD_SC_Create_Blind_or_Visually_Impaired.docx

When the New link is selected from the Blind or Visually Impaired screen, the Create Blind or Visually Impaired pop-up displays. This screen is used to create a new Blind or Visually Impaired record.

The screenshot shows a modal dialog box titled "Create Blind or Visually Impaired". Inside the dialog, there are three dropdown menus. The first dropdown is labeled "Blind or Visually Impaired:" with a red asterisk indicating it is required. The second dropdown is labeled "IHSS Required Forms Option:" with a red asterisk. The third dropdown is labeled "Notice of Action Option:". At the bottom of the dialog are two buttons: "Save" and "Cancel".

Figure – Create Blind or Visually Impaired

Actions/Functions

The following actions are associated with the Create Blind or Visually Impaired pop-up:

Action	Function
Save	Saves the screen and returns the user to the Blind or Visually Impaired list screen.
Cancel	Cancels the action and returns the user to the Blind or Visually Impaired list screen.
Continue	This link is displayed only when a Notice of Action Option or an IHSS Required Forms Option is selected for which the corresponding functionality has not yet been implemented. The "Continue" link allows the user to go back to the Blind or Visually Impaired screen after displaying an informational message.

Data Elements

The following data elements are associated with the Create Blind or Visually Impaired pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Blind or Visually Impaired	The Recipient's impairment indication of Blind or Visually Impaired.	Drop-Down	Yes	No	Yes
Notice of Action Option	The delivery method the Recipient has indicated for NOAs.	Drop-down	Yes	No	Yes
IHSS Required Forms Option	The delivery method the Recipient has indicated for IHSS Required Forms. Currently not all forms are available in a BVI format.	Drop-down	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Blind or Visually Impaired

CI	Document Name
CI-486310 - DSD SC Modify Blind or Visually Impaired IMPLEMENTED	DSD_SC_Modify_Blind_or_Visually_Impaired.docx

When the Edit link is selected from either the Blind or Visually Impaired screen or the View Blind or Visually Impaired screen the Modify Blind or Visually Impaired pop-up displays. This pop-up screen is used to modify an existing Blind or Visually Impaired record.

Figure – Modify Blind or Visually Impaired

Actions/Functions

The following actions are associated with the Modify Blind or Visually Impaired pop-up:

Action	Function
Save	Saves the screen and returns the user to either the Blind or Visually Impaired screen or the View Blind or Visually Impaired screen depending upon the screen from which the Edit link was selected.
Cancel	Cancels the action, closes the screen and returns the user to either the Blind or Visually Impaired screen or the View Blind or Visually Impaired screen depending upon the screen from which the Edit link was selected.
Continue	This link is displayed only when a Notice of Action Option or an IHSS Required Forms Option is selected for which the corresponding functionality has not yet been implemented. The "Continue" link allows the user to go back to the Blind or Visually Impaired screen after displaying an informational message.

Data Elements

The following data elements are associated with the Modify Blind or Visually Impaired pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Created By	The user name of the user who created the BVI record.	String	No	No	No
From	The date on which the record was created. (MM/DD/YYYY HH:MM)	Date Timestamp	No	No	No
To	The End Date of the record. Will display "12/31/9999 12:00"	Date Timestamp	No	12/31/9999 12: 00	No
Modify Blind or Visually Impaired					
Blind or Visually Impaired	The Recipient's impairment indication of Blind or Visually Impaired.	Drop-Down	Yes	No	Yes
Notice of Action Option	The delivery method the Recipient has indicated for NOAs.	Drop-down	Yes	No	Yes
IHSS Required Forms Option	The delivery method the BVI Recipient has indicated for their correspondence. Currently, not all forms are available in BVI format.	Drop-down	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Blind or Visually Impaired

CI	Document Name
CI-486308 - DSD SC View Blind or Visually Impaired IMPLEMENTED	DSD_SC_View_Blind_or_Visually_Impaired.docx

When the View link is selected from the Blind or Visually Impaired screen or for a specific record on the Blind or Visually Impaired History screen, the View Blind or Visually Impaired screen displays. This screen is used to view a current or previous Blind or Visually Impaired record.

Figure – View Blind or Visually Impaired

Actions/Functions

The following actions are associated with the View Blind or Visually Impaired screen:

Action	Function
Edit	Displays the Modify Blind or Visually Impaired pop-up. This link will only display for the current active Blind or Visually Impaired record.
Inactivate	Displays the Inactive Blind or Visually Impaired confirmation pop-up. The Inactivate link will only display for the current, active Blind or Visually Impaired record.
Close	Cancels the action, closes the screen and returns the user to the Blind or Visually Impaired list screen if the View link was selected for the current active Blind or Visually Impaired Record. If the View link was selected for a Blind or Visually Impaired record on the Blind or Visually Impaired History screen, the Close link will close the screen and return the user to the Blind or Visually Impaired History screen.

Data Elements

The following data elements are associated with the View Blind or Visually Impaired screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Created By	The user name of the user who created the BVI record.	String	No	No	No
From	The date and time the Blind or Visually Impaired record was created. (MM/DD/YYYY HH:MM).	Date Timestamp	No	No	No
To	The date and time the Blind or Visually Impaired record became inactive. Note: For current, active BVI Record To date will display "12/31/9999 12:00."	Date Timestamp	No	No	No

View Blind or Visually Impaired					
Blind or Visually Impaired	The Recipient's impairment indication of Blind or Visually Impaired.	String	No	No	No
Notice of Action Option	The delivery method the Recipient has indicated for NOAs.	String	No	No	No
IHSS Required Forms Option	The delivery method the Recipient has indicated for IHSS Required Forms. Currently not all forms are available in a BVI format.	String	No	No	No
IHSS Required Forms Option Language	The language in which the BVI IHSS Required Form was generated.	String	No	No	No
Notice of Action Option Language	The language in which the BVI NOA was generated.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactivate Blind or Visually Impaired

CI	Document Name
CI-486309 - DSD SC Inactivate Blind or Visually Impaired Record IMPLEMENTED	DSD_SC_Inactivate_Blind_or_Visually_Impaired_record.docx

When the Inactivate link is selected for the current, active BVI record on the View Blind or Visually Impaired screen the Inactivate Blind or Visually Impaired pop-up screen displays. This pop-up is used to deactivate the current, active Blind or Visually Impaired record.

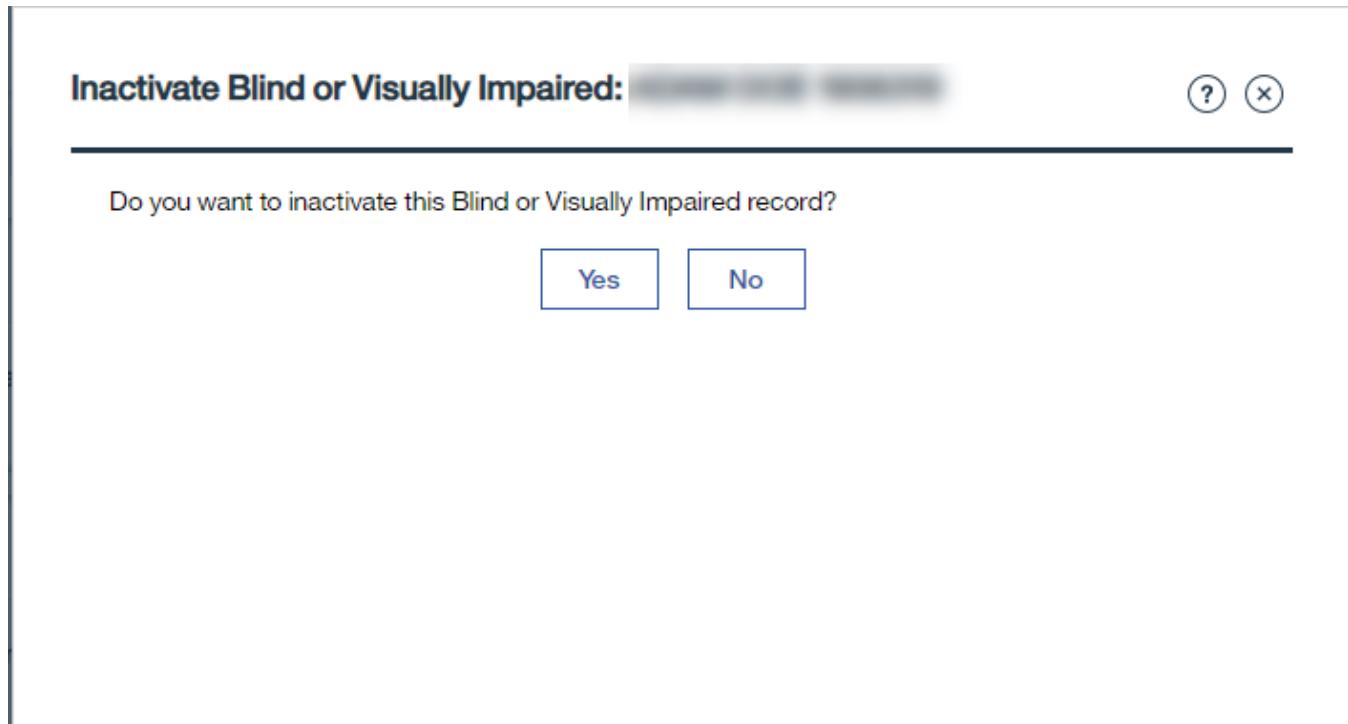


Figure – Inactivate Blind or Visually Impaired

Actions/Functions

The following actions are associated with the Inactivate Blind or Visually Impaired pop-up:

Action	Function
Yes	Inactivates the Blind or Visually Impaired record and moves it to the Blind or Visually Impaired History screen and returns the user to the Blind or Visually Impaired screen.
No	Cancels the action and returns the user to the View Blind or Visually Impaired screen.

Data Elements

There are no data elements associated to the Inactivate Blind or Visually Impaired pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Lock Recipient Authentication Number Confirmation

CI	Document Name
 CI-486314 - DSD SC Lock Recipient Authentication Number Confirmation CANCELLED	DSD_SC_Lock_Recipient.Authentication_Number_Confirmation.docx

Cancelled by ASR Sprint 11 Team 1&2

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Lock Recipient Authentication Number History

CI	Document Name
 CI-486311 - DSD SC Lock Recipient Authentication Number History CANCELLED	DSD_SC_Lock_Recipient_Authentication_Number_History.docx

Cancelled by ASR Sprint 11 Team 1&2

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Blind or Visually Impaired History

CI	Document Name
CI-486313 - DSD SC Blind or Visually Impaired History IMPLEMENTED	DSD_SC_Blind_or_Visually_Impaired_History.docx

When the History link is selected from the Blind or Visually Impaired screen the Blind or Visually Impaired History screen displays. This screen lists the history of BVI records associated with the case. The default sort is most recent Created On date at the top.

Figure – Blind or Visually Impaired History

Actions/Functions

The following actions are associated with the Blind or Visually Impaired History screen:

Action	Function
<<Previous	Displays the previous 50 BVI records. This hyperlink only displays when there are previous records to be displayed.
Next>>	Displays the next group of BVI records (up to 50). This hyperlink only displays when there are additional records to be displayed.
View	Displays the View Blind or Visually Impaired screen.
Close	Closes the screen and returns the user to the View Blind or Visually Impaired screen.

Data Elements

The following data elements are associated with the Blind or Visually Impaired History screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Blind or Visually Impaired	The Recipient's impairment indication of Blind or Visually Impaired.	String	No	No	No
Notice of Action Option	The delivery method the Recipient has indicated for NOAs.	String	No	No	No
Notice of Action Option Language	The Language in which the BVI NOA will be generated.	String	No	No	No
IHSS Required Forms Option	The delivery method the BVI Recipient has indicated for their correspondence. Note: This field is used to capture information only and is not tied to system functionality at this time.	String	No	No	No
IHSS Required Forms Option Language	The Language in which the BVI IHSS Required Form will be generated.	String	No	No	No

Created By	The user name of the user who created the BVI record.	String	No	No	No
From	The date and time the Blind or Visually Impaired record was created. (MM /DD/YYYY HH:MM)	Date Timestamp	No	No	No
To	The date and time the Blind or Visually Impaired record became inactive. (MM/DD/YYYY HH:MM)	Date Timestamp	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Flexible Hours

CI	Document Name
CI-675570 - DSD SC Recipient Flexible Hours IMPLEMENTED	DSD_SC_Recipient_Flexible_Hours.docx

When the Recipient Flexible Hours Page Navigation is selected from the Overtime & Travel Content Tab the Recipient Flexible Hours screen displays. This screen displays only "Pending, Active – Approved" or "Active – Denied" records. Records in "Inactive" status are not be displayed.

Requested Hours	County Approved Hours	Appvd	Need Not Unanticipated	Need Not Immediate	No Health or Safety Issue	Request Outcome Date	Status
00:00	00:00	No	No	No	No		Pending
12:00	12:00	Yes	No	No	No	10/26/2020	Active-Approved

Figure – Recipient Flexible Hours

Actions/Functions

The following actions are associated with the Recipient Flexible Hours screen:

Action	Function
New	Displays the Create Recipient Flexible Hours Information pop-up
View	Displays the View Recipient Flexible Hours screen
Edit	Displays the Modify Recipient Flexible Hours pop-up
History	Displays the Recipient Flexible Hours History pop-up
Inactivate	Displays the Inactivate Recipient Flexible Hours confirmation pop-up

Data Elements

The following data elements are associated with the Recipient Flexible Hours screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Month	The service month (January – December) associated with the flexible hours request	String	No	No	No
Year	The year associated with the flexible hours request (YYYY)	String	No	No	No
Frequency	Frequency of the Flexible Hours request	String	No	No	No
Flexible Hours End Date	The End Date of the Flexible Hours record.. Displays in MM/DD/YYYY format.	Date	No	No	No
Program Type	IHSS or WPCS Program Type	String	No	No	No
Recipient Requested Hours	The number of flexible hours requested by the Recipient (HH:MM)	Integer	No	No	No

County Approved Hours	The number of hours approved by the county (HH:MM)	Integer	No	No	No
Appvd	Approval Outcome	String	No	No	No
Need Not Unanticipated	Denial Outcome (Yes/No)	String	No	No	No
Need Not Immediate	Denial Outcome (Yes/No)	String	No	No	No
No Health or Safety Issue	Denial Outcome (Yes/No)	String	No	No	No
Request Outcome Date	The Status of the Flexible Hours request.. Displays in MM/DD/YYYY format.	Date	No	No	No
Status	The status of the Flexible Hours record	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Recipient Flexible Hours

CI	Document Name
CI-675574 - DSD SC Create Recipient Flexible Hours IMPLEMENTED	DSD_SC_Create_Recipient_Flexible_Hours.docx

When the New link is selected from the Recipient Flexible Hours screen the Create Recipient Flexible Hours pop-up displays. When a Request Outcome is determined the user may select either Approved or one or more of the Denial indications.

The screenshot shows a modal dialog box titled "Create Recipient Flexible Hours". At the top right are a question mark icon and a close button. Below the title, a red asterisk indicates that the "Hours" field is required. The main form area contains the following fields:

- Month: * December
- Type: *
- Hours: 00 : 00
- Date: * 12/22/2020
- End Date: *
- Year: * 2020
- Frequency: *
- County Approved Hours: 00 : 00
- Flexible Hours End Date: *
- Cancellation Letter Date: *

At the bottom of the form, there are four checkboxes for determining the request outcome:

- Approved:
- Denied - Need not immediate:
- Denied not anticipated:
- Denied - No Health or Safety Issue:

At the very bottom of the modal are two buttons: "Save" and "Cancel".

Figure – Create Recipient Flexible Hours

Actions/Functions

The following actions are associated with the Create Recipient Flexible Hours pop-up:

Action	Function
Save	Saves the data and displays the Recipient Flexible Hours screen
Cancel	Cancels the action and displays the Recipient Flexible Hours screen

Data Elements

The following data elements are associated with the Create Recipient Flexible Hours pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Create Recipient Flexible Hours					
Month	The service month (January – December) associated with the flexible hours request	Drop-down	Yes	Yes, Current Month	Yes
Year	Year (YYYY)	String	Yes	Yes, Current Year	Yes
Program Type	The Program Type (IHSS or WPCS) to which the Flexible Hours record is associated	Drop-down	Yes	No	Yes
Frequency	The frequency of the Flexible Hours either One-Time or On-Going	Drop-Down	Yes	No	Yes
Recipient Requested Hours	The number of additional overtime hours Requested by the Recipient (HH:MM)	Integer	Yes, when Request Outcome is indicated	No	Yes
County Approved Hours	The number of additional overtime hours Approved by the county (HH:MM)	Integer	Yes, when Request Outcome is indicated	No	Yes
Recipient Request Date	The date on which the Recipient contacted the county with the Flexible Hours request (MM/DD/YYYY)	Date	Yes	Yes, Current Date	Yes
Request Outcome Date	The date the outcome of Approved or Rejected was entered by the user (MM/DD/YYYY)	Date	Yes, when Request Outcome is Approved or any of the Denied indications	No	Yes
Flexible Hours End Date	When End Date of Flexible Hours (MM/DD/YYYY)	Date	No, only when Frequency is "On-Going" and the flexible hours should be discontinued.	No	Yes
Outcome Letter Date	The date the system generated the outcome letter (MM /DD/YYYY)	Date	No, System Generated	No	No
Cancellation Letter Date	The date on which the cancellation letter is printed (MM /DD/YYYY)	Date	No, System Generated	No	No
Request Outcome					
Approved	Approval	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Denied – Need not immediate	Denied – Need not immediate	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Denied – Need not unanticipated	Denied – Need not unanticipated	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Denied – No Health or Safety Issue	Denied – No Health or Safety Issue	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Comments					
Comments	User comments, up to 1,000 alpha numeric characters	String	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Recipient Flexible Hours

CI	Document Name
CI-675572 - DSD SC View Recipient Flexible Hours IMPLEMENTED	DSD_SC_View_Recipient_Flexible_Hours.docx

When the View link associated with a specific Recipient Flexible Hours record is selected the View Recipient Flexible Hours screen displays.

The screenshot shows a web-based application interface for viewing recipient flexible hours. At the top, there's a header bar with the system name 'MPS II Case Management Information Payroll System II', a 'Case Number' input field, a search icon, and a 'Welcome' dropdown. Below the header is a large form area with several input fields and dropdown menus. The form includes the following data:

- Year: 2020
- Frequency: One-Time
- County Approved Hours: 00:00
- Flexible Hours End Date: 11/30/2020
- Cancellation Letter Date: (empty)
- Denied - Need not immediate: No
- Denied - No Health or Safety Issue: No

At the bottom of the form are two buttons: 'Edit...' and 'Close'.

Figure – View Recipient Flexible Hours

Actions/Functions

The following actions are associated with the View Recipient Flexible Hours screen:

Action	Function
Edit	Displays the Modify Recipient Flexible Hours pop-up
Close	Displays the Recipient Flexible Hours screen

Data Elements

The following data elements are associated with the View Recipient Flexible Hours screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
View Recipient Flexible Hours					
Month	The service month (January – December) associated with the flexible hours request	String	No	No	No
Year	Year (YYYY)	String	No	No	No
Program Type	The Program Type (IHSS or WPCS) to which the Flexible Hours record is associated	String	No	No	No
Frequency	The frequency of the Flexible Hours either One-Time or On-Going	Drop-Down	No	No	No

Recipient Requested Hours	The number of additional overtime hours Requested by the Recipient (HH:MM)	Integer	No	No	No
County Approved Hours	The number of additional overtime hours Approved by the county (HH:MM)	Integer	No	No	No
Recipient Request Date	The date on which the Recipient contacted the county with the Flexible Hours request (MM/DD/YYYY)	Date	No	No	No
Request Outcome Date	The date the outcome of Approved or Rejected was entered by the user (MM/DD/YYYY)	Date	No	No	No
Flexible Hours End Date	When End Date of Flexible Hours (MM/DD/YYYY)	Date	No	No	No
Outcome Letter Date	The date the system generated the outcome letter (MM/DD/YYYY)	Date	No	No	No
Cancellation Letter Date	The date on which the cancellation letter is printed (MM/DD/YYYY)	Date	No	No	No
Request Outcome					
Approved	Approval	String	No	No	No
Denied – Need not immediate	Denied – Need not immediate (Yes/No)	String	No	No	No
Denied – Need not unanticipated	Denied – Need not unanticipated (Yes/No)	String	No	No	No
Denied – No Health or Safety Issue	Denied – No Health or Safety Issue (Yes/No)	String	No	No	No
Comments					
Comments	User comments, up to 1,000 alpha numeric characters	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Recipient Flexible Hours

CI	Document Name
CI-675569 - DSD SC Modify Recipient Flexible Hours IMPLEMENTED	DSD_SC_Modify_Recipient_Flexible_Hours.docx

When the Edit link associated with a specific Recipient Flexible Hours record on the Recipient Flexible Hours screen or on the View Recipient Flexible Hours screen is selected the Modify Recipient Flexible Hours pop-up displays. This pop-up is editable until the Request Outcome has been determined and it is processed in the nightly batch which generates the notification letters. After letter generation the only field which is editable are the "Flexible Hours End Date", and only when the Frequency is "On-Going". The "Comments" field is always editable.

The screenshot shows a modal dialog box titled 'Modify Recipient Flexible Hours'. The form includes the following fields:

- Year: * 2020
- Frequency: * One-Time
- County Approved Hours: 00:00
- Flexible Hours End Date: 11/30/2020
- Cancellation Letter Date: 11/05/2020
- Comments (large text area)
- Denied - Need not immediate:
- Denied - No Health or Safety Issue:
- Save
- Cancel

Figure – Modify Recipient Flexible Hours

Actions/Functions

The following actions are associated with the Modify Recipient Flexible Hours pop-up:

Action	Function
Save	Saves the data and displays the Recipient Flexible Hours screen

Cancel	Cancels the action and displays the Recipient Flexible Hours screen
--------	---

Data Elements

The following data elements are associated with the Modify Recipient Flexible Hours pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Modify Recipient Flexible Hours - This screen is editable until the Request Outcome has been determined and it is processed in the nightly batch which generates letters. After letter generation the only fields which are editable are the "Flexible Hours End Date" and "Comments".					
Month	The service month (January – December) associated with the flexible hours request	Drop-down	Yes	Yes, Current Month	Yes
Year	Year (YYYY)	String	Yes	Yes, Current Year	Yes
Program Type	The Program Type (IHSS or WPCS) to which the Flexible Hours record is associated	Drop-down	Yes	No	Yes
Frequency	The frequency of the Flexible Hours either One-Time or On-Going	Drop-Down	Yes	No	Yes
Recipient Requested Hours	The number of additional overtime hours Requested by the Recipient (HH:MM)	Integer	Yes, when Request Outcome is indicated	No	Yes
County Approved Hours	The number of additional overtime hours Approved by the county (HH:MM)	Integer	Yes, when Request Outcome is indicated	No	Yes
Recipient Request Date	The date on which the Recipient contacted the county with the Flexible Hours request (MM/DD/YYYY)	Date	Yes	Yes, Current Date	Yes
Request Outcome Date	The date the outcome of Approved or Rejected was entered by the user (MM/DD/YYYY)	Date	Yes, when Request Outcome is Approved or any of the Denied indications	No	Yes
Flexible Hours End Date	When End Date of Flexible Hours (MM/DD/YYYY)	Date	No, only when Frequency is "On-Going" and the flexible hours should be discontinued.	No	Yes
Outcome Letter Date	The date the system generated the outcome letter (MM /DD/YYYY)	Date	No, System Generated	No	No
Cancellation Letter Date	The date on which the cancellation letter is printed (MM /DD/YYYY)	Date	No, System Generated	No	No
Request Outcome					
Approved	Approval	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Denied – Need not immediate	Denied – Need not immediate	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Denied – Need not unanticipated	Denied – Need not unanticipated	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Denied – No Health or Safety Issue	Denied – No Health or Safety Issue	Checkbx	One Request Outcome required when Request Outcome Date populated	No	Yes
Comments					
Comments	User comments, up to 1,000 alpha numeric characters	String	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient Flexible Hours History

CI	Document Name
CI-675573 - DSD SC Recipient Flexible Hours History IMPLEMENTED	DSD_SC_Recipient_Flexible_Hours_History.docx

When the History link is selected from the Recipient Flexible Hours screen the Recipient Flexible Hours History pop-up displays.

Frequency	Flexible Hours End Date	Program Type	Recipient Requested Hours	County Approved Hours	Approved	Status	Last Updated	Updated By
One-Time	11/30/2020	IHSS	00:00	00:00	No	Pending	11/19/2020	[redacted]

Figure – Recipient Flexible Hours History

Actions/Functions

The following actions are associated with the Recipient Flexible Hours History pop-up:

Action	Function
View	Displays the View Recipient Flexible Hours screen for the record.
Close	Closes the screen and displays Recipient Flexible Hours screen.

Data Elements

The following data elements are associated with the Recipient Flexible Hours History pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Month	Calendar Month January - December	String	No	No	No
Year	Year (YYYY)	String	No	No	No
Frequency	The frequency of the Flexible Hours either One-Time or On-Going	String	No	No	No
Flexible Hours End Date	The Flexible Hours End Date (MM/DD/YYYY)	Date	No	No	No
Program Type	The program type (IHSS or WPCS)	String	No	No	No
Recipient Requested Hours	The number of flexible hours the Recipient requested (HH:MM)	Integer	No	No	No

County Approved Hours	The number of flexible hours approved (HH:MM)	Integer	No	No	No
Approved	Will be Yes or No depending upon indication	String	No	No	No
Status	The Status of the Flexible Hours record	String	No	No	No
Last Updated	The date the record was last updated (MM/DD/YYYY)	Date	No	No	No
Updated By	The name of the user who updated the record.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactivate Recipient Flexible Hours

CI	Document Name
CI-675571 - DSD SC Inactivate Recipient Flexible Hours IMPLEMENTED	DSD_SC_Inactivate_Recipient_Flexible_Hours.docx

When the Inactivate link is selected from the Recipient Flexible Hours screen for a specific record the Inactivate Recipient Flexible Hours pop-up displays. When the "Yes" link is selected on this screen the record will be set to Inactive and no longer displays on the Recipient Flexible Hours screen.

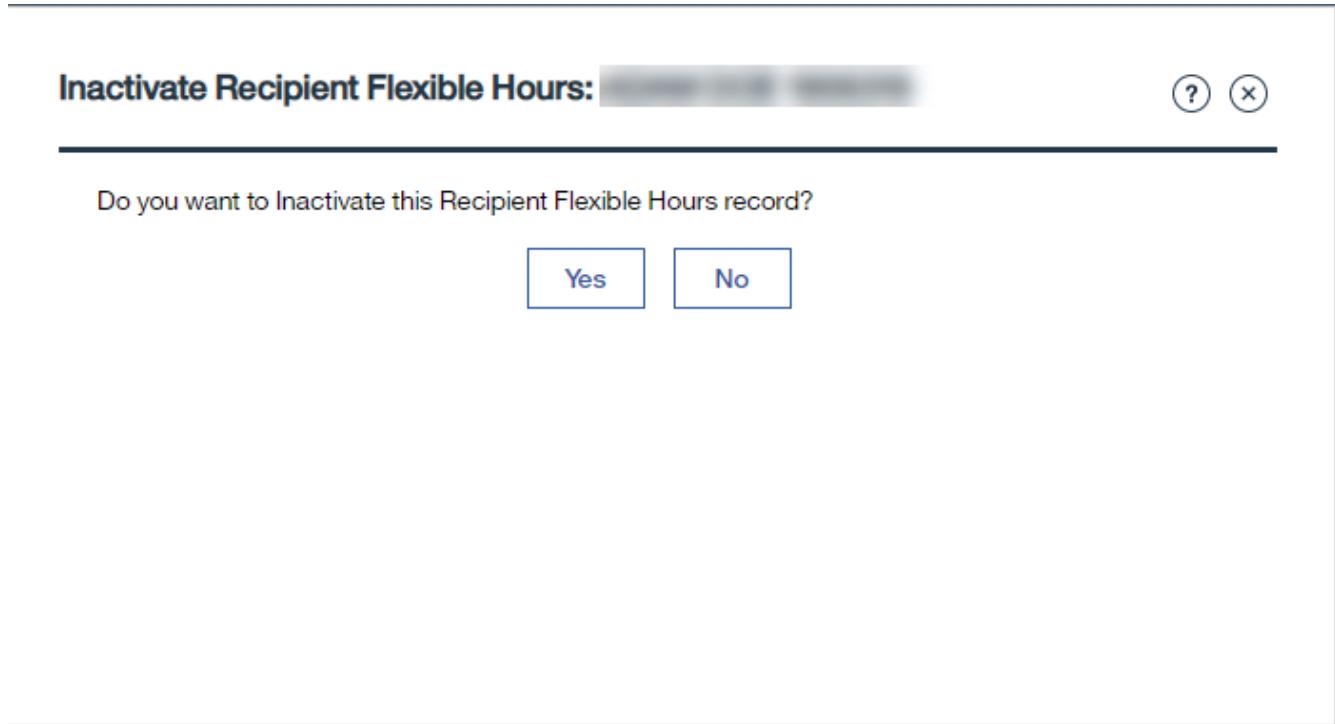


Figure – Inactivate Recipient Flexible Hours

Actions/Functions

The following actions are associated with the Inactivate Recipient Flexible Hours pop-up:

Action	Function
Yes	Inactivates the current record and displays the Recipient Flexible Hours screen where the record will no longer display.
No	Cancels the action and returns the user to the Recipient Flexible Hours screen.

Data Elements

There are no data elements associated with the Inactivate Recipient Flexible Hours pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Unannounced Home Visit Details

CI	Document Name
CI-718084 - DSD SC View Unannounced Home Visit Details IMPLEMENTED	DSD_SC_View_Unannounced_Home_Visit_Details.docx

When the View link is selected on the Unannounced Home Visit screen (UHV) for an existing Unannounced Home Visit, the View Unannounced Home Visit Details screen displays. Depending upon whether or not an Unannounced Home Visit progresses beyond the Initial Attempt. If only the Initial Attempt occurs the View Unannounced Home Visit screen only displays information associated with the Initial UHV Attempt.

The screenshot shows a software interface for managing home visits. At the top, there's a navigation bar with links for 'Case Management', 'Payroll System', 'Case Number', a search icon, 'Welcome' (with a user icon), and a dropdown menu. Below the navigation is a large central window titled 'View Unannounced Home Visit Details'. This window contains several sections of form fields. At the top of the main area, there's a status message: 'Status Date: 11/02/2020'. Below this, there's a section labeled 'Edit' which contains fields for 'Outcome' (set to 'Follow-up Required'), 'Provider', and 'Date Created' (set to '11/05/2020'). At the bottom left of the main window, there's a 'Close' button. The overall layout is clean and organized, typical of a professional software application.

Figure – View Unannounced Home Visit Details – Initial UHV Attempt

However, if a follow-up attempt is needed the following screen will display.

The screenshot shows a web-based application interface for case management. At the top, there is a header bar with the text "MIPS II Case Management Information Payroll System II", "Case Number", a search icon, and "Welcome". Below the header is a large, vertically scrollable form. The form contains several sections of input fields, each with a "Last Updated" timestamp of "11/20/2020". The first section includes fields for "Status Date" (11/17/2020) and "Edit Comments". Subsequent sections include "Outcome" (Uncooperative), "Provider", and "Date Created" (11/16/2020). The bottom of the form has a "Close" button.

Figure – View Unannounced Home Visit Details – Follow-up UHV Attempt

Actions/Functions

The following actions are associated with the Unannounced Home Visit Detail screen:

Action	Function
Edit	Displays the Modify Unannounced Home Visit pop-up for the Initial UHV (only available on same day of the initial UHV record was created).
Edit Comments	Displays the Modify Unannounced Home Visit pop-up for the Initial UHV (replaces the Edit link subsequent days after the initial UHV record was created).
Close	Dismisses the screen and displays the Unannounced Home Visit screen.

Follow-up UHV Attempt – This cluster only displays when an unsuccessful outcome for the Initial home visit attempt has been entered.	
Created Follow-up Letter	Displays the Create Follow-up Letter Entry pop-up.
Modify Follow-up Letter	Displays the Modify Follow-up Letter Entry pop-up (once the Follow-up UHV Attempt Letter Mailed Date has been initially entered this link will display instead of the Create Follow-up Letter).
Inactivate	Displays the Inactivate Details pop-up associated with the Follow-up Letter. This link will only display on initial date of entry of the Follow-up Letter and only when a Follow-up Outcome has not been entered.
Create Follow-up Phone Call	Displays the Create Phone Call Entry pop-up.
Modify Follow-up Phone Call	Displays the Modify Phone Call Entry pop-up (once the Follow-up UHV Attempt Phone Call Date Time has been initially entered this link will display instead of the Create Follow-up Phone Call link).
Inactivate	Displays the Inactivate Details pop-up associated with Follow-up Phone Call. This link will only display on initial date of entry of the Follow-up Phone Call and only when a Follow-up Outcome has not been entered.
Follow-up Visit	Displays the Create Unannounced Home Visit pop-up.
Modify Follow-up Visit	Displays the Modify Unannounced Home Visit pop-up (once the Follow-up UHV Attempt Home Visit Date Time has been initially entered this link will display instead of the Create Follow-up Visit link).
Final UHV Attempt – This cluster only displays when an unsuccessful outcome for the follow-up home visit attempt has been entered.	
Create Final Phone Call	Displays the Create Phone Call Entry pop-up.
Modify Final Phone Call	Displays the Modify Phone Call Entry pop-up (once the Final UHV Attempt Phone Call Date Time has been initially entered this link will display instead of the Create Final Phone Call link).
Inactivate	Displays the Inactivate Details pop-up associated with the Final Phone Call. This link will only display on initial date of entry of the Final Phone Call and only when a Final Outcome has not been entered.
Create Final Visit	Displays the Create Unannounced Home Visit pop-up.
Modify Final Visit	Displays the Modify Unannounced Home Visit pop-up (once the Final UHV Attempt Home Visit Date Time has been initially entered this link will display instead of the Create Final Visit link).

Data Elements

The following data elements are specific to the View Unannounced Home Visit Details screen:

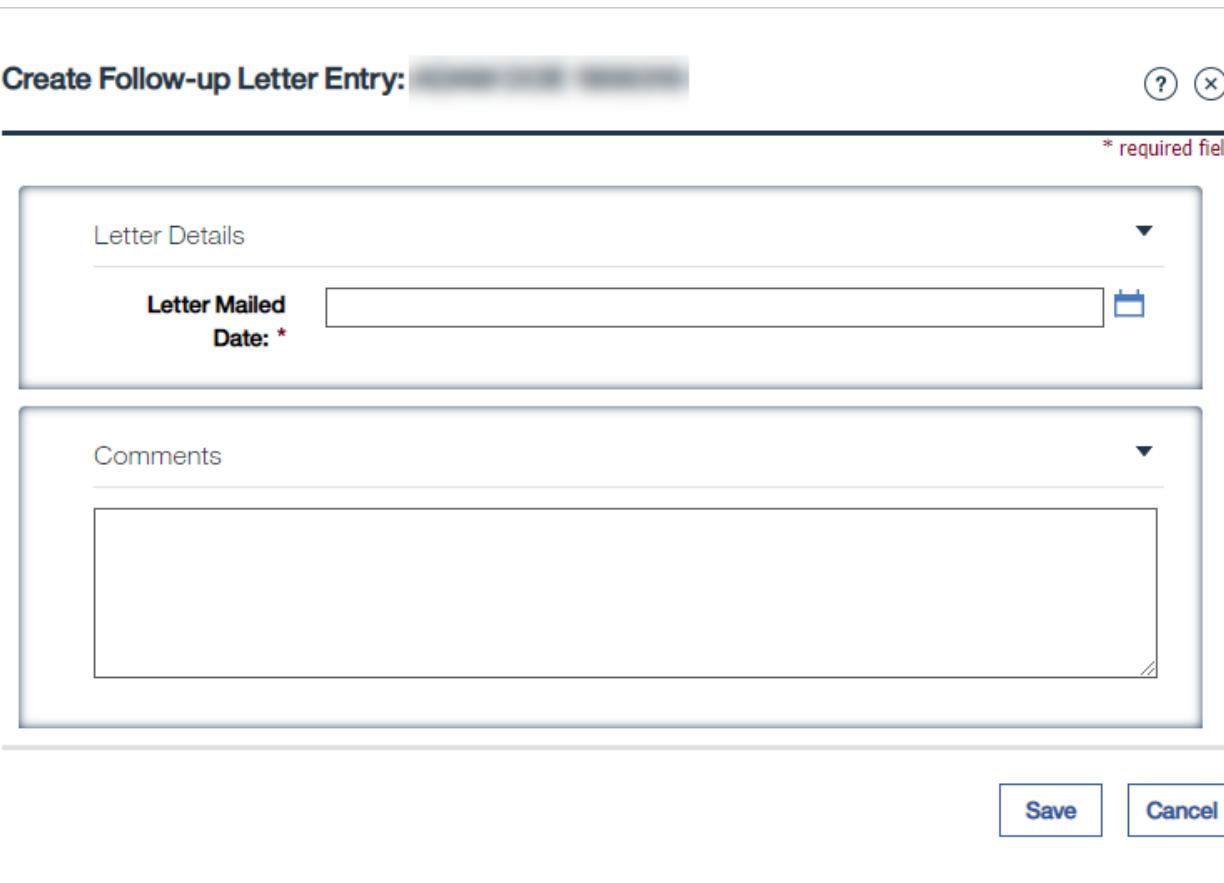
Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Unannounced Home Visit Details					
Status					
UHV Status	Status of the current event for Unannounced Home Visit series.	String	No	No	No
Status Date	Date of the Status of the current event for the Unannounced Home Visit series. (MM /DD/YYYY)	Date	No	No	No
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No
Initial UHV Attempt					
Home Visit Date Time	The date and time entered for when the Initial UHV attempt occurred. (MM/DD /YYYY HH:MM)	Date & Time	No	No	No
Outcome	The outcome of the Initial UHV Attempt.	String	No	No	No
Reason	The reason for the Unannounced Home Visit series.	String	No	No	No
Provider	Provider number if the Visit Focus is Provider.	String	No	No	No
Visit Focus	The focus of the home visit. Values are Recipient or Provider.	String	No	No	No
Date Created	The date the Initial UHV Attempt record was created. (MM/DD/YYYY)	Date	No	No	No
Comments					
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No
Follow-up UHV Attempt – This cluster will only display when an unsuccessful outcome for the Initial home visit attempt has been entered.					

Manage (Follow-up Letter)						
Letter Mailed Date	Date entered for when the Follow-up Letter was Mailed. (MM/DD/YYYY)	Date	No	No	No	No
Last Update	The date the last update was made to the Follow-up Letter/Comments record. (MM/DD/YYYY)	Date	No	No	No	No
Date Created	The date the Follow-up Letter Mailed record was created. (MM/DD/YYYY)	Date	No	No	No	No
Comments (Follow-up Letter)						
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No	No
Manage (Follow-up Phone Call)						
Phone Call Date Time	Date and time entered for when the Follow-up Phone Call occurred. (MM/DD/YYYY HH:MM)	Date & Time	No	No	No	No
Last Update	The date the last update was made to the Follow-up Phone Call/Comments record. (MM/DD/YYYY)	Date	No	No	No	No
Date Created	The date the Follow-up Phone Call record was created. Displays in MM/DD/YYYY format.	Date	No	No	No	No
Comments (Follow-up Phone Call)						
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No	No
Manage (Follow-up Visit)						
Home Visit Date Time	The date and time entered for when the Follow-up Visit attempt occurred. (MM/DD/YYYY HH:MM)	Date & Time	No	No	No	No
Date Created	The date the Follow-up Home Visit record was created. (MM/DD/YYYY)	Date	No	No	No	No
Outcome	The outcome of the Follow-up Visit attempt.	String	No	No	No	No
Last Update	The date the last update was made to the Follow-up Visit/Comments record. (MM/DD/YYYY)	Date	No	No	No	No
Comments (Follow-up Visit)						
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No	No
Final UHV Attempt – This cluster will only display when an unsuccessful outcome for the follow-up home visit attempt has been entered						
Manage (Final Phone Call)						
Phone Call Date Time	Date and time entered for when the Final Phone Call occurred. (MM/DD/YYYY HH:MM)	Date & Time	No	No	No	No
Last Update	The date the last update was made to the Final Phone Call/Comments record. (MM/DD/YYYY)	Date	No	No	No	No
Date Created	The date the Final Phone Call record was created. (MM/DD/YYYY)	Date	No	No	No	No
Comments (Final Phone Call)						
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No	No
Manage (Final Visit)						
Home Visit Date Time	The date and time entered for when the Final Home Visit attempt occurred. (MM/DD/YYYY HH:MM)	Date & Time	No	No	No	No
Date Created	The date the Final Home Visit record was created. (MM/DD/YYYY)	Date	No	No	No	No
Outcome	The outcome of the Final Home Visit attempt.	String	No	No	No	No
Last Update	The date the last update was made to the Final Home Visit/Comments record. (MM/DD/YYYY)	Date	No	No	No	No
Comments (Final Visit)						
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Follow-up Letter Entry

CI	Document Name
 CI-718083 - DSD SC Create Follow-up Letter Entry IMPLEMENTED	DSD_SC_Create_Follow-up_Letter_Entry.docx

When the Create Follow-up Letter action is selected on the View Unannounced Home Visit Details screen, the Create Follow-up Letter Entry pop-up displays.



The figure shows a modal dialog titled "Create Follow-up Letter Entry". At the top right are a question mark icon and a close (X) icon. Below the title, a red asterisk indicates a required field. The form contains two sections: "Letter Details" and "Comments". The "Letter Details" section includes a "Letter Mailed Date" field with a calendar icon. The "Comments" section is a large text area. At the bottom right are "Save" and "Cancel" buttons.

Figure – Create Follow-up Letter Entry

Actions/Functions

The following actions are associated with the Create Follow-up Letter pop-up:

Action	Function
Save	Saves the screen and displays the View Unannounced Home Visit Details screen.
Cancel	Closes the screen and displays the View Unannounced Home Visit Details screen.

Data Elements

The following data elements are specific to the Create Follow-up Letter Entry pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Letter Details					
Letter Mailed Date	Date entered for when the Follow-up Letter was Mailed. (MM/DD/YYYY)	Date	Yes	No	Yes
Comments					
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments	String	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Follow-up Letter Entry

CI	Document Name
CI-718086 - DSD SC Modify Follow-up Letter Entry IMPLEMENTED	DSD_SC_Modify_Follow-up_Letter_Entry.docx

When the Modify Follow-up Letter action is selected on the View Unannounced Home Visit Details screen, the Modify Follow-up Letter Entry pop-up displays.

The screenshot shows a modal dialog box titled "Modify Follow-up Letter Entry". At the top right are a help icon (question mark) and a close/cancel icon. Below the title is a note: "* required field". The main area is divided into sections: "Letter Details" and "Comments". In "Letter Details", there is a date input field showing "11/06/2020" with a calendar icon, and a "Date Created" field also showing "11/06/2020". In "Comments", there is a text area with placeholder text "enter comments here". At the bottom right of the modal are "Save" and "Cancel" buttons.

Figure – Modify Follow-up Letter Entry

Actions/Functions

The following actions are associated with the Modify Follow-up Letter Entry pop-up:

Action	Function
Save	Saves the screen and displays the View Unannounced Home Visit Details screen.
Cancel	Closes the screen and displays the View Unannounced Home Visit Details screen.

Data Elements

The following data elements are specific to the Modify Follow-up Letter Entry pop-up:

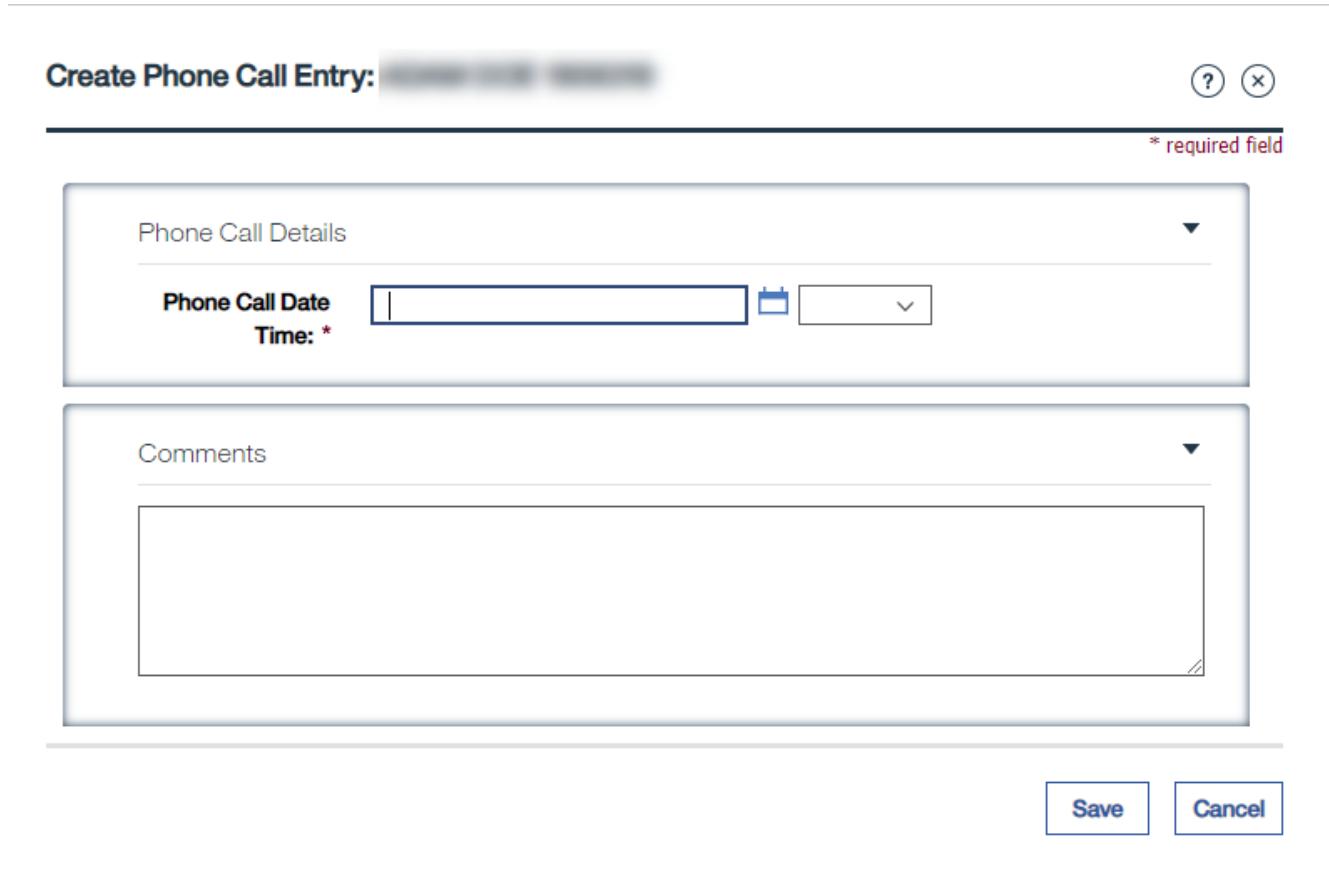
Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Letter Details						
Letter Mailed Date	Date entered for when the Follow-up Letter was Mailed.	Date	Yes	No	Yes only on the day this field was initially entered then No	
Comments						
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments	String	No	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Phone Call Entry

CI	Document Name
 CI-718088 - DSD SC Create Phone Call Entry IMPLEMENTED	DSD_SC_Create_Phone_Call_Entry.docx

When the Create Follow-up Phone Call action or the Create Final Phone Call action is selected on the View Unannounced Home Visit Details screen, the Create Phone Call Entry pop-up displays.



The figure shows a modal dialog titled "Create Phone Call Entry". At the top right are a help icon (?) and a close/cancel icon (X). Below the title is a note: "* required field". The form is divided into two sections: "Phone Call Details" and "Comments". The "Phone Call Details" section contains fields for "Phone Call Date" (with a date input field and a calendar icon) and "Time:" (with a dropdown menu). The "Comments" section is a large text area for notes. At the bottom right are "Save" and "Cancel" buttons.

Figure – Create Phone Call Entry

Actions/Functions

The following actions are associated with the Create Phone Call Entry pop-up:

Action	Function
Save	Saves the screen and displays the View Unannounced Home Visit Details screen.
Cancel	Closes the screen and displays the View Unannounced Home Visit Details screen.

Data Elements

The following data elements are specific to the Modify Phone Call Entry pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Phone Call Details					
Phone Call Date Time	Date and time entered for when the Follow-up or Final Phone Call Occurred. (MM /DD/YYYY HH:MM)	Date Drop-down list	Yes	No	Yes
Comments					
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Phone Call Entry

CI	Document Name
CI-718085 - DSD SC Modify Phone Call Entry IMPLEMENTED	DSD_SC_Modify_Phone_Call_Entry.docx

When the Modify Follow-up Phone Call link or the Modify Final Phone Call Link is selected on the View Unannounced Home Visit Details screen, the Modify Phone Call Entry pop-up displays.

Figure – Modify Phone Call Entry

Actions/Functions

The following actions are associated with the Modify Phone Call Entry pop-up:

Action	Function
Save	Saves the screen and displays the View Unannounced Home Visit Details screen.
Cancel	Closes the screen and displays the View Unannounced Home Visit Details screen.

Data Elements

The following data elements are specific to the Modify Phone Call Entry pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Phone Call Details					

Phone Call Date Time	Date and time entered for when the Follow-up or Final Phone Call Occurred. (MM/DD/YYYY HH:MM)	Date Drop-down list	Yes	No	Yes only on the day this field was initially entered; then No
Comments					
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Home Visit Entry

CI	Document Name
CI-718081 - DSD SC Create Home Visit Entry IMPLEMENTED	DSD_SC_Create_Home_Visit_Entry.docx

When the Create Follow-up Visit or the Create Final Visit action is selected on the View Unannounced Home Visit Details screen, the Create Home Visit Entry pop-up displays.

Figure – Create Home Visit Entry

Actions/Functions

The following actions are associated with the Create Home Visit Entry pop-up:

Action	Function
Save	Saves the screen and displays the View Unannounced Home Visit Details screen.
Cancel	Closes the screen and displays the View Unannounced Home Visit Details screen.

Data Elements

The following data elements are specific to the Create Home Visit Entry pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Home Visit Details					

Home Visit Date Time	Date and time entered for when the Follow-up or Final Phone Home Visit occurred. (MM/DD/YYYY HH:MM)	Date Drop-down list	Yes	No	Yes
Outcome	The outcome of the Follow-up or Final Home Visit.	Drop-down list	No	No	Yes
Comments					
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Home Visit Entry

CI	Document Name
CI-718087 - DSD SC Modify Home Entry Visit IMPLEMENTED	DSD_SC_Modify_Home_Entry_Visit.docx

When the Modify Follow-up Visit or the Modify Final Visit actions are selected on the View Unannounced Home Visit Details screen, the Modify Home Visit Entry pop-up displays.

Home Visit Entry: [REDACTED] ? ×

* required field

Home Visit Details

Home Visit Date: 11/04/2020 11/04/2020 Time: * 08:00 08:00 Date Created: 11/06/2020

Outcome: * No Contact Made

Comments

Save Cancel

Figure – Modify Home Visit Entry

Actions/Functions

The following actions are associated with the Modify Home Visit Entry pop-up:

Action	Function
Save	Saves the screen and displays the View Unannounced Home Visit Details screen.
Cancel	Closes the screen and displays the View Unannounced Home Visit Details screen.

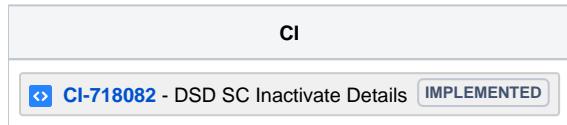
Data Elements

The following data elements are specific to the Modify Home Visit Entry pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Home Visit Details						
Home Visit Date Time	Date and time entered for when the Follow-up or Final Phone Home Visit occurred. (MM/DD/YYYY HH:MM)	Date Drop-down list	Yes	No	No	Yes
Outcome	The outcome of the Follow-up or Final Home Visit.	Drop-down list	No	No	No	Yes
Comments						
Comments	User comments – allows up to 1000 characters – may be updated any time after initial entry of comments.	String	No	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactivate Details



When any of the Inactivate links is selected on the View Unannounced Home Visit Details screen, the Inactivate Details pop-up displays.

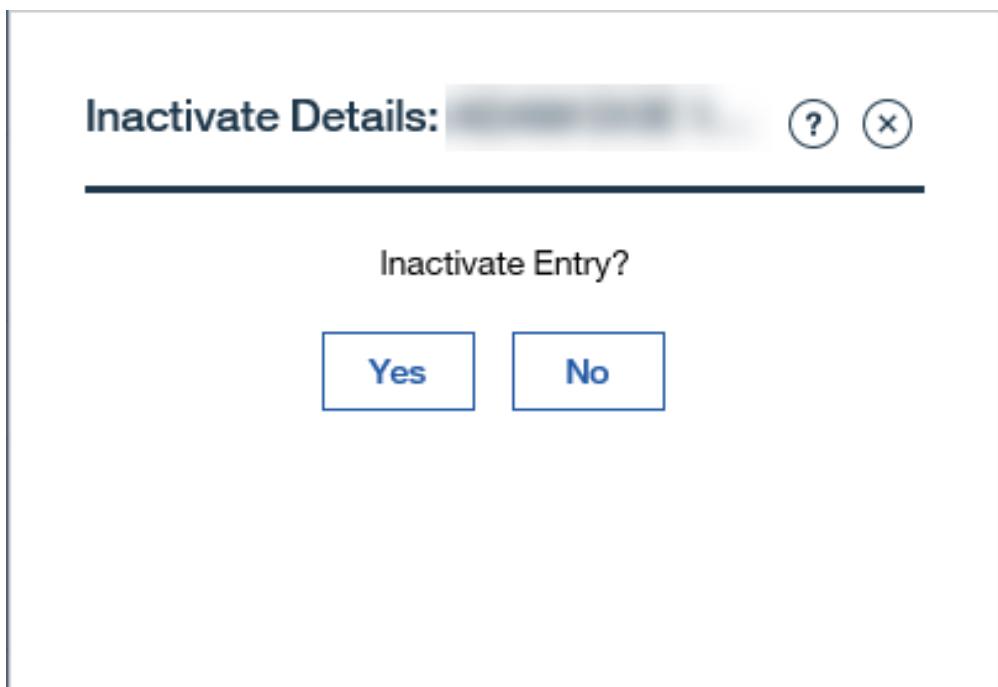


Figure – Inactivate Details

Actions/Functions

The following actions are associated with the Inactivate Details pop-up:

Action	Function
Yes	Deletes the corresponding Follow-up record and associated comments (Follow-up Letter, Follow-up Phone Call or Final Phone Call) and returns to the Unannounced Home Visit Details Screen
No	Closes the pop up without delete and displays the View Unannounced Home Visit Details screen.

Data Elements

There are no Data Elements for the Inactivate Details pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient E-Timesheet Enrollment

CI	Document Name
 CI-753319 - DSD SC Recipient E Timesheet Enrollment CANCELLED	DSD_SC_Recipient_E_Timesheet_Enrollment.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#)

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Create Recipient E-Timesheet Enrollment

CI	Document Name
 CI-753314 - DSD SC Create Recipient E Timesheet Enrollment CANCELLED	DSD_SC_Create_Recipient_E_Timesheet_Enrollment.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#)

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Recipient E-Timesheet Enrollment

CI	Document Name
 CI-753317 - DSD SC Modify Recipient E Timesheet Enrollment CANCELLED	DSD_SC_Modify_Recipient_E_Timesheet_Enrollment.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#)

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Recipient E-Timesheet Enrollment

CI	Document Name
 CI-753322 - DSD SC View Recipient E Timesheet Enrollment CANCELLED	DSD_SC_View_Recipient_E_Timesheet_Enrollment.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#)

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Stop Recipient E-Timesheet Enrollment

CI	Document Name
 CI-753316 - DSD SC Stop E Timesheet Enrollment Record CANCELLED	DSD_SC_Stop_E_Timesheet_Enrollment_record.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#)

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Recipient E-Timesheet Enrollment History

CI	Document Name
 CI-753320 - DSD SC Recipient E Timesheet Enrollment History CANCELLED	DSD_SC_Recipient_E_Timesheet_Enrollment_History.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#).

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Case Providers E-Timesheet Status

CI	Document Name
 CI-753311 - DSD SC Case Providers E Timesheet Status CANCELLED	DSD_SC_Case_Providers_E_Timesheet_Status.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#).

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Provider E-Timesheet Status

CI	Document Name
 CI-753321 - DSD SC View Provider E Timesheet Status CANCELLED	DSD_SC_View_Provider_E_Timesheet_Status.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#).

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Change E-Timesheet Option Confirmation

CI	Document Name
 CI-753312 - DSD SC Change E Timesheet Option Confirmation CANCELLED	DSD_SC_Change_E_Timesheet_Option_Confirmation.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#).

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/IHSS Website Registration

CI	Document Name
 CI-795492 - DSD SC IHSS Website Registration CANCELLED	DSD_SC_IHSS_Website_Registration.docx

Cancelled by ASR Sprint 11 Team 1&2

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Inactivate Recipient IHSS ESP Registration

CI	Document Name
CI-795493 - DSD SC Inactivate Recipient IHSS ESP Registration IMPLEMENTED	DSD SC Inactivate Recipient IHSS ESP Registration

This screen is accessed when a Recipient Case Owner selects the 'Inactivate IHSS Website Registration...' button on the IHSS ESP Registration Screen. Once comments are entered, and the Case Owner selects the 'Yes' button, the IHSS ESP Registration for that case is inactivated and a confirmation letter, ETSE028 (SOC 2321) is generated to the county printer. A pdf version of letter can also be viewed and printed from the Case Forms/Correspondence screen.

The screenshot shows a modal dialog box titled "Inactivate Recipient IHSS ESP Registration". At the top right are a help icon (?) and a close button (X). Below the title, a message asks, "Do you want to Inactivate the IHSS ESP registration for this recipient?". Two buttons are present: "Yes" and "No". Underneath the message is a text input field labeled "Comments:" with a red asterisk (*) indicating it is a required field. The input field has scroll arrows at the bottom right. The entire window is enclosed in a light gray border.

Figure – Inactivate Recipient IHSS ESP Registration

Actions/Functions

The following actions are associated with the Inactivate Recipient IHSS ESP Registration pop-up:

Action	Function
Yes	This button, when selected, will commit the inactivation of the IHSS ESP registration for the case.
No	This button, when selected, will close this pop-up window and returns the user to the View Recipient Timesheet Preferences Screen.

Data Elements

The following data elements are associated with the Inactivate Recipient IHSS ESP Registration pop-up:

Field Name	Help	Data Type	Required Field	Default Value	Editable Field	Label Translated
Comment	Used by the case owner to add comments for the IHSS ESP registration inactivation	Text (1000 bytes)	Yes	Blank	Yes	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Reactivate Recipient IHSS ESP Registration

CI	Document Name
CI-795494 - DSD SC Reactivate Recipient IHSS ESP Registration IMPLEMENTED	DSD SC Reactivate Recipient IHSS ESP Registration

This screen is accessed when a Recipient Case Owner selects the 'Reactivate IHSS ESP Registration...' button on the IHSS ESP Registration Screen. Once comments are entered, and the Case Owner selects the 'Yes' button the IHSS ESP Registration for that case will be reactivated; however, the recipient will still have to re-register if they would like to access the IHSS ESP.

The screenshot shows a modal dialog box with the following elements:

- Title Bar:** "Reactivate Recipient IHSS ESP Registration: [REDACTED]" with a help (?) icon and a close (X) icon.
- Text:** "Do you want to Reactivate the IHSS ESP registration for this recipient?" followed by a note: "Note: The recipient is still required to go through the IHSS ESP registration process to access the website."
- Buttons:** Two blue rectangular buttons labeled "Yes" and "No".
- Comments Area:** A text input field labeled "Comments: *". The input field has a scroll bar on the right side.

Figure – Reactivate Recipient IHSS ESP Registration

Actions/Functions

The following actions are associated with the Reactivate Recipient IHSS ESP Registration pop-up:

Action	Function
Yes	This button, when selected, will remove the IHSS ESP registration for the case from ESP. Note: The recipient will be required to re-register if they would like to access/use the IHSS ESP
No	This button, when selected, will close this pop-up and the user will be returned to the View Recipient Timesheet Preferences screen.

Data Elements

The following data elements are associated with the Reactivate Recipient IHSS ESP Registration pop-up:

Field Name	Help	Data Type	Required Field	Default Value	Editable Field	Label Translated
Comment	Use by the case owner to add comments for the IHSS ESP Registration Reactivation	Text (1000 bytes)	Yes	Blank	Yes	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/IHSS ESP Registration History

CI	Document Name
CI-795495 - DSD SC IHSS ESP Registration History IMPLEMENTED	DSD SC IHSS ESP Registration History

This screen is accessed when the 'History' button on the View Recipient Timesheet Preferences screen is selected. The screen displays the history of action for the Recipient's IHSS ESP registration. By selecting the 'View Comments...' hyperlink, comments the case owner entered upon IHSS ESP inactivation and reactivation can be viewed.

Status To Date	ESP User Name	Updated By	Action
11/20/2020	[redacted]	[redacted]	View Comments...
11/20/2020	[redacted]	[redacted]	View Comments...

Figure – IHSS ESP Registration History

Actions/Functions

The following actions are associated with the IHSS ESP Registration History screen:

Action	Function
View Comments	This link, when selected, will display the View IHSS ESP Registration Comments pop-up. <i>Note: Because there are no comments when the recipient registers on the IHSS ESP when the registration record is moved into history the 'View Comments...' link will not be visible for the records that are created by the WEBSITE USER.</i>
Close	This button, when selected, will close this IHSS ESP Registration History screen and display the View Recipient Timesheet Preferences screen.

Data Elements

The following data elements are associated with the IHSS ESP Registration History screen:

Field Name	Help	Data Type	Required Field	Default Value	Editable Field
Registration Date	Date the recipient registered on the IHSS ESP. This will be blank if the recipient has not registered.	Date: MM/DD/YYYY	No	No	No
Status	The IHSS ESP registration status for this history record time period.	String	No	No	No
Status Date From Date	The effective start date of the IHSS ESP registration action for the history segment.	Date: MM/DD/YYYY	No	No	No
Status To Date	The end date of the effectiveness of the activity for the IHSS ESP registration for that history segment	Date: MM/DD/YYYY	No	No	No
Website User Name	The IHSS ESP User Name that was registered under the Case Number for the history segment.	String	No	No	No

Updated By	First and Last name of the county worker who took the action for the history segment. if the ESP user made the action (Activation) it will be "WEBSITE USER"	String	No	No	No
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DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Recipient Timesheet Preferences

CI	Document Name
 CI-819022 - DSD SC View Recipient Timesheet Preferences IMPLEMENTED	DSD SC View Recipient Timesheet Preferences

From My Workspace, select Case Perspective > Timesheet & Payroll > Preferences to display the View Recipient Timesheet Preferences screen. The screen displays information about the Recipient's timesheet communication and accommodation preferences, registration details for ESP and TTS, EVV participation information by Provider as well as notification preference. If the case tables do not exist to support this screen, all actions/functions are disabled.

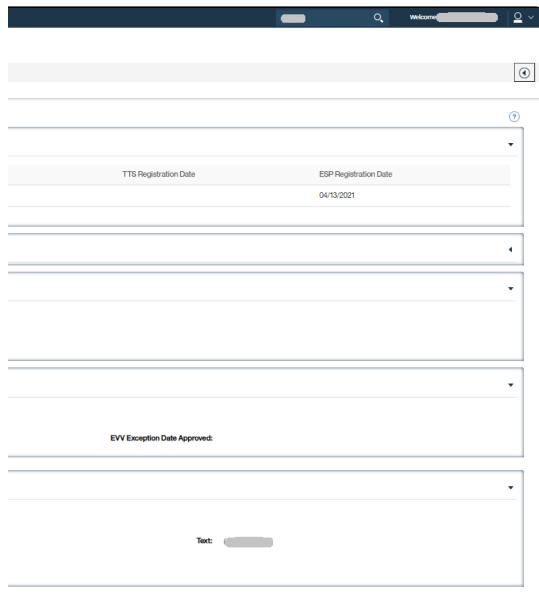


Figure - View Recipient Timesheet Preferences

Actions/Functions

The following data elements are specific to the View Recipient Timesheet Preferences screen:

Action	Function
Electronic Timesheet Review Method – IHSS Electronic Services Portal	
Inactivate IHSS ESP Registration...	Selecting this button will display the Inactivate Recipient IHSS ESP Registration pop-up.
Note: <i>This button has two states depending on the state of the Recipient IHSS ESP Registration. This state will show if the registration is active or does not exist.</i>	
Reactivate IHSS ESP Registration...	Selecting this button will display the Reactivate Recipient IHSS ESP Registration pop-up.
Note: <i>This button has two states depending on the state of the Recipient IHSS ESP Registration. This state will show if the registration is inactive.</i>	
History	Selecting this button will display the IHSS ESP Registration History screen.
Electronic Timesheet Review Method – Telephone Timesheet System	

Reset Registration Code...	Selecting this button will display the Reset Recipient TTS Registration Code pop-up. This button only displays if the Recipient has not registered for TTS and the TTS Registration Code field is populated. NOTE: This button will not be displayed for the help desk users.
Register Recipient for TTS...	Selecting this button will display the Register TTS pop-up. This button only displays if the Recipient is not registered for TTS. NOTE: This button will not be displayed for the help desk users.
Reset Passcode...	Selecting this button will display the Reset Recipient TTS Passcode pop-up. This button only displays if the Recipient is registered for TTS. NOTE: This button will not be displayed for the help desk users.
Electronic Timesheet Review Method – Timesheet Accommodation	
Edit Timesheet Accommodation...	Selecting this button will display the Modify Timesheet Accommodation pop-up. Note: This button only displays if a record for the case exists in the CaseEVVDetails database table.
Timesheet Communication Preference	
Edit...	Selecting this button will display the Modify Timesheet Communication Preference pop-up. Communication Preference is set automatically upon initial registration with ESP and/or TTS. Recipients will be offered the option to modify the Communication Preference when they register for ESP or TTS and their preference is already set by registration to the other option. Recipients can modify their Communication Preference using ESP. County users can also modify the Communication Preference.
EVV Exception	
EVV Exception...	Select this button to open the Confirm EVV Exception for Recipient pop-up screen. When the EVV Exception status is blank, the EVV Exception button displays. When an EVV Exception status is active, the EVV Exception button does not display.
Notification Communication Preference	
Edit	This button displays the Modify Notification Communication Preference pop-up where the Recipient can change the Communication Preference.
Verify Cell Phone	This button displays the Verify Cell Phone Number pop-up where the Recipient can request a Verification Code to verify his/her cell phone number. NOTE: This button is displayed only if the Recipient has a phone number on file which has not been verified yet.

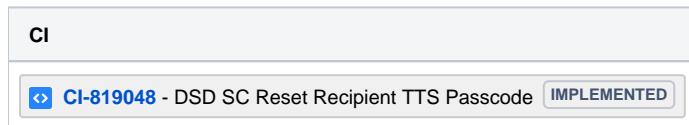
Data Elements

The following data elements are specific to the View Recipient Timesheet Preferences screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editabile Field
Assigned Providers – The list is sorted by Provider status first, last name second, and first name third.					
Provider Name	The first and last name (displayed in this order) of a Provider assigned to the Recipient.	String	No	No	No
Provider Number	The number of the Provider assigned to the Recipient.	Number	No	No	No

Provider Status	The status of the Provider assigned to the Recipient.	String	No	No	No
EVV Effective Date	The EVV effective date of the Provider with this Recipient.	Date: MM/DD /YYYY	No	No	No
TTS Registration Date	The date the Provider registered with TTS.	Date: MM/DD /YYYY	No	No	No
ESP Registration Date	The date the Provider registered with ESP.	Date: M M/DD /YYYY	No	No	No
Electronic Timesheet Review Method					
Electronic Timesheet Review Method – IHSS Electronic Services Portal					
Registration Date	Date the Recipient registered on the IHSS ESP. This value is blank if the Recipient has not registered.	Date: MM/DD /YYYY	No	No	No
ESP User Name	The IHSS ESP User Name that was registered under the Case Number. This value is blank if the Recipient has not registered.	String	No	No	No
Status	The IHSS ESP registration status. Values are blank, Active, Inactive, Reactivated and No.	String	No	No	No
Status Date	The date of the most recent IHSS ESP registration action; either completed on the IHSS ESP or within Case Management.	Date: MM/DD /YYYY	No	No	No
Updated By	First and Last name of the county worker who took the most recent action on the IHSS ESP registration (Inactivation or Reactivation) or "WEBSITE USER" if the ESP user created the most recent action (Activation)	String	No	No	No
Comments	Comments that the case owner made upon Inactivation or Reactivation of the IHSS ESP registration	String (500 character limit)	No	No	No
Electronic Timesheet Review Method – Telephone Timesheet System					
TTS Registration Code	The Recipient's TTS Registration Code. It can be reset to a random value from the Reset Recipient TTS Registration Code pop-up screen. This value is blank until a code is initiated. This field only displays if the Recipient has not registered for TTS.	String	No	Blank	No
Registration Date	Date the Recipient registered on the Telephone Timesheet System. This field only displays if the Recipient has registered for TTS.	Date: MM/DD /YYYY	No	No	No
Passcode Locked	An indicator of whether the passcode is locked (isLocked status). It reads either 'Yes' or 'No'. This field only displays if the Recipient has registered for TTS.	String	No	"No"	No
Electronic Timesheet Review Method – Timesheet Accommodation					
Timesheet Accommodation	This field indicates any timesheet accommodation requested by the recipient. Values are No Accommodation, Press or Say (set by recipient registration with the Accommodations TTS line or by a county user) or Large Font Timesheets	String	No	"No Accommodation"	No
Timesheet Communication Preference					
Communication Preference	Preference of how the Recipient would like to be contacted when a timesheet is ready for review. Values are blank, 'Telephone' or 'Email'	String	No	Blank	No
EVV Exception					
EVV Exception Status	The EVV Exception status. Values are Blank or Active.	String	No	Blank	No
EVV Exception Date Approved	Date the EVV Exception was approved.	Date: MM/DD /YYYY	No	No	No
Notification Preference					
Email	The Recipient's email address. "No email on file" is displayed if the Recipient is not registered with ESP and there is no email on file.	String	No	No	No
Text Message	The Recipient's cell phone number. "No number on file" is displayed if the Recipient has no phone number on file. "(Not Verified)" is displayed next to the phone number listed if that phone number has not been verified.	String	No	No	No
Preference of IHSS Program Notifications related to Payroll Processing and Message Center	The Recipient's preferred notification delivery method.	String	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Reset Recipient TTS Passcode



This pop-up is displayed when a user in Case Management selects the 'Reset Passcode...' button in the Telephone Timesheet System cluster of the View Recipient Timesheet Preferences screen. This pop-up when opened contains two editable fields for the user to input a 4-digit passcode that can be saved in Case Management as the Recipient's new passcode when the user selects, 'Save'.

A screenshot of a 'Reset Recipient TTS Passcode' dialog box. The title bar says 'Reset Recipient TTS Passcode:' followed by a blurred recipient ID. There are help (?) and close (X) buttons. A note at the top right says '* required field'. The main area has two text input fields: 'New Passcode:' with a red asterisk and 'Confirm Passcode:' below it. Both fields have a placeholder 'I'. At the bottom are 'Save' and 'Cancel' buttons.

Figure – Reset Recipient TTS Passcode

Actions/Functions

The following actions are associated with the Reset Recipient TTS Passcode pop-up:

Hyperlink	Function
Save	<p>This button, when clicked, will:</p> <ul style="list-style-type: none">Validate the New Passcode and Confirm Passcode fields to be numeric, 4 digits, and that they match each other.Saves the Passcode to the database if valid, otherwise, it shall display an error message and not close.Closes the Reset Recipient TTS Passcode pop-screen and returns to the View Recipient Timesheet Preferences screen.When the Passcode Status is currently Locked then the Passcode Status is set to Unlocked which will display as 'Passcode Locked: No' on the View Recipient Timesheet Preferences screenUpdate the Recipient Authorization Number (recipAuthNumber) on the CaseETSEnrollment table if a record for the Recipient exists.Update the Recipient Authorization Number (recipAuthNumber) on the CaseBVI table if a record for the Recipient exists. <p>Note: If Inter-County Transfer (ICT) exists in "Transfer Complete" status, a User from the Sending County, with the right security role (Refer to DSD Appendix A), has access to modify this screen.</p>
Cancel	This button, when clicked, will close this pop-up window and send the user back to the View Recipient Timesheet Preferences screen without saving the Passcode.

Data Elements

The following data elements are specific to the Reset Recipient TTS Passcode pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
New Passcode	A field to input the new passcode.	Number	Yes	No	Yes
Confirm Passcode	A field to input the new passcode again for confirmation.	Number	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Confirm EVV Exception for Recipient



The Confirm EVV Exception for Recipient pop-up is accessed in Case Management from the View Recipient Timesheet Preferences screen when a county user selects the EVV Exception button. This pop-up poses a question to the county user and includes both Yes and No button options.

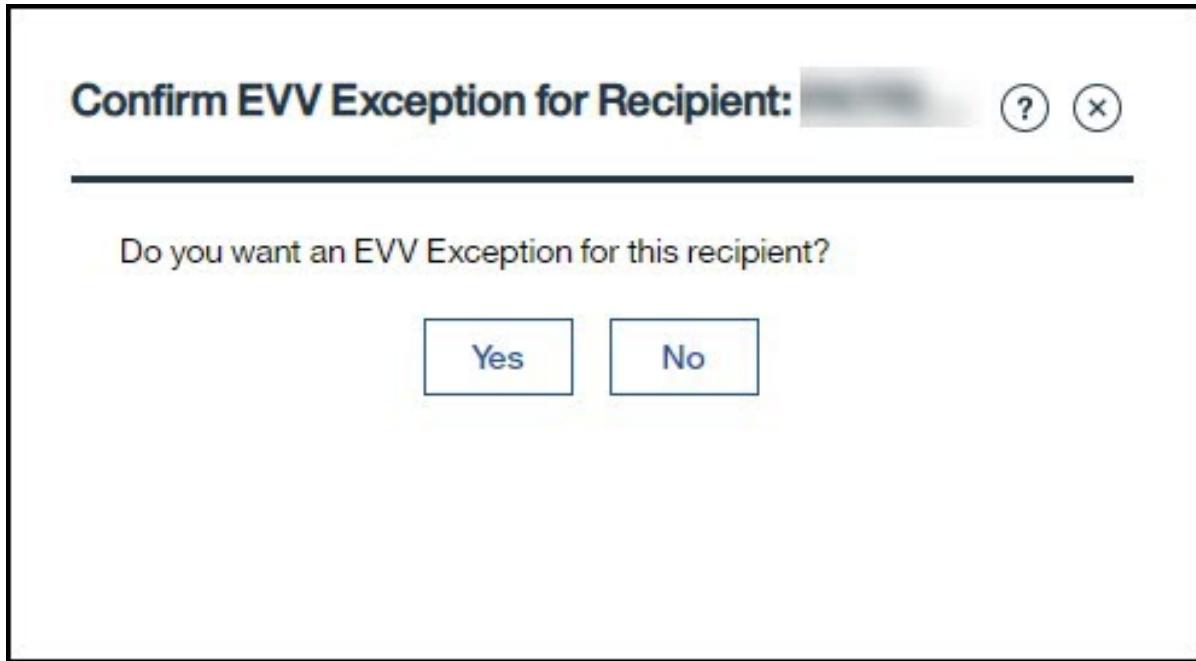


Figure – Confirm EVV Exception for Recipient

Actions/Functions

The following actions are associated with the Confirm EVV Exception for Recipient pop-up:

Action	Function
Yes	When selected, if the Recipient is registered on either the ESP or TTS, an informational message will display and the button must be selected again. Selection of the button exempts the Recipient from electronic or telephonic review of a timesheet, closes the pop-up and returns the user to the View Recipient Timesheet Preferences screen. In the EVV Exception cluster on the View Recipient Timesheet Preferences screen, the EVV Exception Status field displays 'Approved' and the EVV Exception Date Approved field displays the date the EVV Exception was approved. The EVV Exception button is no longer present. If the Recipient was registered with ESP the Recipient's account will be removed from ESP and/or they were registered with TTS the registration will be removed. Note: If Inter-County Transfer (ICT) exists in "Transfer Complete" status, a User from the Sending County, with the right security role (Refer to DSD Appendix A), has access to modify this screen.
No	When selected, this button cancels the EVV Exception action, closes the pop-up and returns the county user to the View Recipient Timesheet Preferences screen. In the EVV Exception cluster on the View Recipient Timesheet Preferences screen, both the EVV Exception Status and EVV Exception Date Approved fields are blank. The EVV Exception button remains present.

Data Elements

There are no data elements associated with the EVV Exception for Recipient pop-up.

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Reset Recipient TTS Registration Code

CI
CI-819026 - DSD SC Reset Recipient TTS Registration Code IMPLEMENTED

This screen is accessed when a user in Case Management selects the 'Reset Registration Code...' button on the View Recipient Timesheet Preferences screen. This pop-up when opened contains a randomly generated TTS Registration Code that can be saved in Case Management as the Recipient's new TTS Registration Code when the user selects, 'Save' and a drop-down list of how the [CMIPS 001 - Recipient Electronic Visit Verification \(EVV\) Telephone System Registration Code Notification](#) form shall be printed; either in the overnight batch or immediately.

The screenshot shows a modal dialog box titled "Reset Recipient TTS Registration Code". At the top right are a question mark icon and a close (X) icon. Below the title, a note says "* required field". The main content area is titled "New TTS Registration Code:" and contains a text input field with a blurred value. To the left of the input field is a "Print:" label followed by a dropdown menu set to "Print in Nightly Bat". At the bottom of the dialog are two buttons: "Save" and "Cancel".

Figure – Reset Recipient TTS Registration Code

Actions/Functions

The following actions are associated with the Reset Recipient TTS Registration Code pop-up:

Action	Function
Save	This button, when selected, will commit the displayed registration code as the Recipient's new TTS registration code, replacing any previous value. It will also trigger a print job or set a trigger for the form to print in the overnight batch depending on the option selected in the Print field. The pop-up will then close to display the View Recipient Timesheet Preferences screen which will be refreshed to show the new TTS registration code. Note: If Inter-County Transfer (ICT) exists in "Transfer Complete" status, a User from the Sending County, with the right security role (Refer to DSD Appendix A), has access to modify this screen.
Cancel	This button, when selected, will close this pop-up window and return the user to the View Recipient Timesheet Preferences screen without saving the TTS registration code or print option.

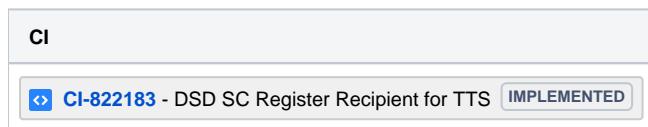
Data Elements

The following data elements are specific to the Reset Recipient TTS Registration Code pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

New TTS Registration Code	Displays the new Recipient TTS registration code. This is populated with a random, non-unique value when the pop-up opens. The registration code generation is always 6 digits and will be padded with zeroes.	String	No	Randomly generated 6-digit value between 000000-999999.	No
Print	Drop-down list that provides the print options: print immediately or print in overnight batch.	Drop-down	Yes	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Register Recipient for TTS



The Register Recipient for TTS pop-up is accessed when a user in Case Management selects the "Register Recipient for TTS..." button in the Telephone Timesheet System cluster of the View Recipient Timesheet Preferences screen. This pop-up when displayed contains two editable fields for the user to input a 4-digit passcode that can be saved in Case Management as the Recipient's new passcode when the user selects, 'Register'.

A screenshot of a "Register TTS" pop-up window. It features a title bar with "Register TTS:" and icons for help and close. Below the title is a note "* required field". The main area contains two text input fields: "Passcode:" and "Confirm Passcode:", both marked with an asterisk. Below the inputs are "Register" and "Cancel" buttons. The entire window is enclosed in a black border.

Figure – Register Recipient for TTS

Actions/Functions

The following actions are associated with the Register Recipient for TTS pop-up:

Hyperlink	Function
Register	This action allows the user to register the Recipient with the TTS using the input passcode. The pop-up will close to display the View Recipient Timesheet Preferences screen and the updated registration information will display. Note: If Inter-County Transfer (ICT) exists in "Transfer Complete" status, a User from the Sending County, with the right security role (Refer to DSD Appendix A), has access to modify this screen.
Cancel	This button will close this pop-up and return the user to the View Recipient Timesheet Preferences screen without registering the Recipient.

Data Elements

The following data elements are specific to the Register Recipient for TTS pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Passcode	A field to input a 4-digit passcode.	Number	Yes	No	Yes
Confirm Passcode	A field to input the passcode again for confirmation.	Number	No	No	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Timesheet Communication Preferences

CI
CI-819041 - DSD SC Modify Timesheet Communication Preferences IMPLEMENTED

This pop-up is displayed when a user in Case Management selects the 'Edit...' button in the Timesheet cluster of the View Recipient Timesheet Preferences screen. This pop-up when displayed contains a drop-down list of communication preferences that can be saved in Case Management as the Recipient's new Communication Preference when the user selects, 'Save'. The drop-down is pre-populated with the existing preference options for the user, including a blank value if applicable.

Modify Timesheet Communication Preferenc... ? ×

* required field

Timesheet

Communication Preference: *

Email

Save Cancel

Figure – Modify Timesheet Communication Preferences

Actions/Functions

The following actions are associated with the Modify Timesheet Communication Preferences pop-up:

Hyperlink	Function
Save	<p>This button, when selected, will commit the selected communication preference as the Recipient's new Communication Preference if it is a valid selection, replacing any previous existing value. The pop-up will then close to display the View Recipient Timesheet Preferences screen which will be refreshed to show the newly selected Communication Preference. If the selection is not valid, an error message will display, and the pop-up will not close.</p> <p>Note: If Inter-County Transfer (ICT) exists in "Transfer Complete" status, a User from the Sending County, with the right security role (Refer to DSD Appendix A), has access to modify this screen.</p>
Cancel	This button, when selected, will close this pop-up and return the user to the View Recipient Timesheet Preferences screen without saving the Communication Preference.

Data Elements

The following data elements are specific to the Modify Timesheet Communication Preferences pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Communication Preference	A drop-down that is populated with a blank value, a 'Telephone' value, and an 'Email' value.	Drop-down list	Yes	Default value is blank if the Recipient is not registered to ESP or to TTS, it is not a selectable value . The preference is set to Email if the Recipient is a registered user of only ESP. The preference is set to Telephone if the Recipient is a registered user of only TTS. When a Recipient is a registered user of both ESP and TTS they can have either Email or Telephone as their preference. The preference will update automatically based on registration actions.	Yes
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DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View IHSS ESP Registration Comments



This pop-up is accessed when a user selects the View Comments link on the IHSS ESP Registration History screen.

A screenshot of a modal dialog box. The title bar says "View IHSS ESP Registration Comments:" followed by two small circular icons with question marks and crosses. The main content area has a label "Comments: Enter comments here." and a "Close" button at the bottom.

Figure – View IHSS ESP Registration Comments

Actions/Functions

The following actions are associated with the View IHSS ESP Registration Comments pop-up:

Action	Function
Close	This button, when selected, will close the View IHSS ESP Registration Comments pop-up and return the user to the IHSS ESP Registration History screen.

Data Elements

The following data elements are associated with the View IHSS ESP Registration Comments pop-up:

Field Name	Help	Data Type	Required Field	Default Value	Editable Field
Comments	The comments that the Case Owner entered, either upon inactivation or reactivation of IHSS ESP registration for that case.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/View Recipient Flexible Hours History

CI	Document Name
CI-822940 - DSD SC View Recipient Flexible Hours History IMPLEMENTED	DSD_SC_View_Recipient_Flexible_Hours_History.docx

When the View link is selected from the Recipient Flexible Hours History pop-up the View Recipient Flexible Hours History pop-up displays.

The screenshot shows a modal dialog box titled "Recipient Flexible Hours History". At the top right are a help icon and a close button. Below the title, there's a section header "Recipient Flexible Hours History Details" with a dropdown arrow. The main area contains a grid of data pairs:

Month:	November	Need Not Unanticipated:	No
Year:	2020	Need Not Immediate:	No
Frequency:	One-Time	No Health or Safety Issue:	No
Flexible Hours End Date:	11/30/2020	Request Outcome Date:	
Program Type:	IHSS	Status:	Pending
Recipient Requested Hours:	00:00	Created On:	11/19/2020
County Approved Hours:	00:00	Last Updated:	11/19/2020
Recipient Request Date:	11/05/2020	Updated By:	ELIDA SERRATOS
Approved:	No		

At the bottom left is a "Close" button.

Figure – View Recipient Flexible Hours History

Actions/Functions

The following actions are associated with the View Recipient Flexible Hours History pop-up:

Action	Function
Close	Closes the pop-up and displays Recipient Flexible Hours list screen.

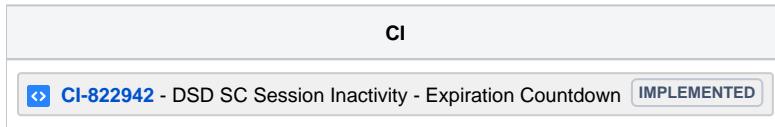
Data Elements

The following data elements are associated with the View Recipient Flexible Hours History pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Recipient Flexible Hours History Details					

Month	Calendar Month January - December	String	No	No	No
Year	Year (YYYY)	String	No	No	No
Frequency	The frequency of the Flexible Hours either One-Time or On-Going	String	No	No	No
Flexible Hours End Date	The Flexible Hours End Date (MM/DD/YYYY)	Date	No	No	No
Program Type	The program type (IHSS or WPCS)	String	No	No	No
Recipient Requested Hours	The number of flexible hours the Recipient requested (HH:MM)	Integer	No	No	No
County Approved Hours	The number of flexible hours approved (HH:MM)	Integer	No	No	No
Recipient Request Date	The date of the Recipient request (MM/DD/YYYY)	Date	No	No	No
Approved	Will be Yes or No depending upon indication	String	No	No	No
Need Not unanticipated	Will be Yes or No depending upon indication	String	No	No	No
Need not immediate	Will be Yes or No depending upon indication	String	No	No	No
No Health or Safety Issue	Will be Yes or No depending upon indication	String	No	No	No
Request Outcome Date	The date the request outcome was determined (MM/DD/YYYY)	Date	No	No	No
Status	The Status of the Flexible Hours record	String	No	No	No
Created On	The date the record was created (MM/DD/YYYY)	Date	No	No	No
Last Updated	The date the record was last updated (MM/DD/YYYY)	Date	No	No	No
Updated By	The name of the user who updated the record.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Session Inactivity - Expiration Countdown



When the CMIPS Application has been idle for 15 minutes, a Session Inactivity pop-up displays indicating that the session will expire in five minutes and counting down to that expiration. At the end of the five minutes if no action is taken the Session Inactivity - Session Expired pop-up displays and the user is logged off the application.

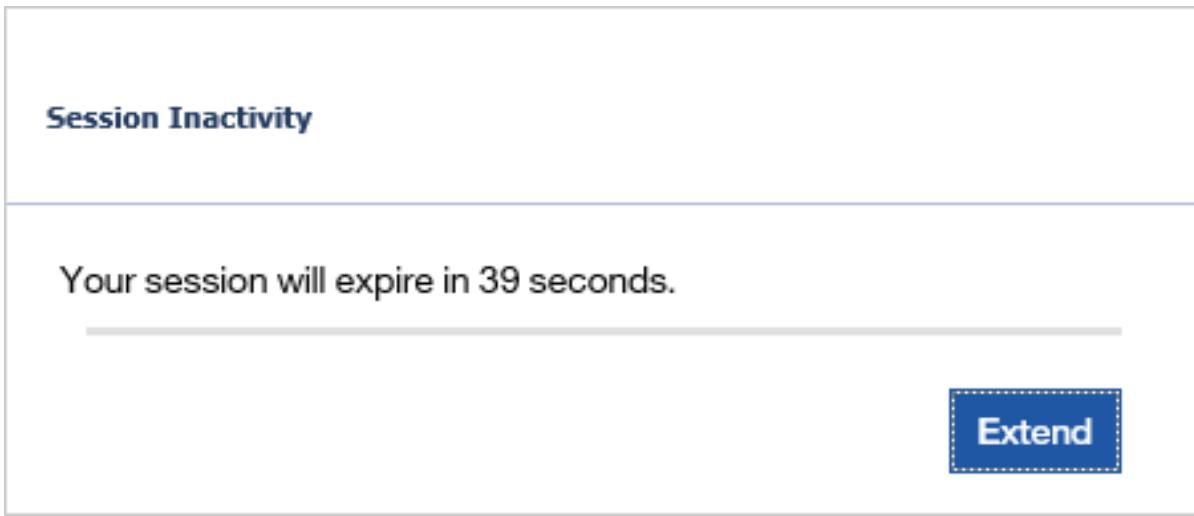


Figure – Session Inactivity - Expiration Countdown

Actions/Functions

The following actions are associated with the Session Inactivity - Expiration Countdown pop-up:

Action	Function
Extend	Extends the user's session and closes the pop-up displaying the screen/pop-up the user was on when the pop-up was displayed..

Data Elements

The following data elements are associated with the Session Inactivity - Expiration Countdown pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
<Session Expiration Countdown>	The time left until the user's session expires. If the time is greater than or equal to 1 minute, the countdown will show both minutes and seconds, otherwise, it will only show seconds.	String	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Notification Communication Preferences

CI
CI-823136 - DSD SC Modify Notification Preference - Recipient IMPLEMENTED

This pop-up is displayed when a user in Case Management selects the 'Edit...' button in the Notification Preference cluster of the View Recipient Timesheet Preferences screen. This pop-up when displayed contains a drop-down list of notification preferences that can be saved in Case Management as the Recipient's new Notification Preference when the user selects, 'Save'. The drop-down is pre-populated with the existing preference option email for the user, plus text or both email and text.

The screenshot shows a modal dialog box titled "Modify Notification Preference: TIM SMOTHERS...". Inside the dialog, there is a dropdown menu labeled "Notification". Below it is another dropdown menu labeled "Notification Preference: *". The "Email" option is selected in this dropdown. There are two buttons at the bottom: "Save" and "Cancel". A red asterisk (*) is placed next to the word "required field" above the "Notification Preference" dropdown.

Figure – Modify Notification Preference

Actions/Functions

The following actions are associated with the Modify Notification Preference pop-up:

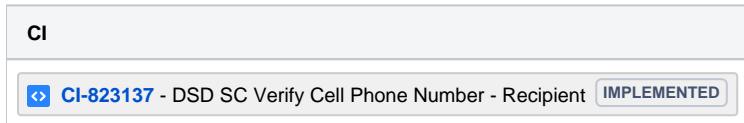
Hyperlink	Function
Save	This button, when selected, will commit the selected notification preference as the Recipient's new Notification Preference if it is a valid selection, replacing any previous existing value. The pop-up will then close to display the View Recipient Timesheet Preferences screen which will be refreshed to show the newly selected Notification Preference. If the selection is not valid, an error message will display, and the pop-up will not close.
Cancel	This button, when selected, will close this pop-up and return the user to the View Recipient Timesheet Preferences screen without saving the Notification Preference.

Data Elements

The following data elements are specific to the Modify Notification Preference pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Notification Preference	A drop-down that is populated with a 'Email' value, a 'Text' value, and a 'Both Email and Text' value.	Drop-down list	Yes	The preference is set to Email if the Recipient is a registered user of only ESP.	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Verify Cell Phone Number



This Verify Cell Phone Number pop-up is displayed when a user in Case Management selects the 'Verify Cell Phone...' button in the Notification Communication Preference cluster of the View Recipient Timesheet Preferences screen. This pop-up when displayed contains a the Recipient's cell phone number. A 6-digit verification code is sent to the user's cell phone when the user selects 'Send'.

A screenshot of a 'Verify Cell Phone Number' pop-up window. At the top left is the title 'Verify Cell Phone Number:' followed by a grey input field. To the right are two circular icons: one with a question mark and one with an 'X'. Below the title is a dropdown menu with the option 'Send Verification Code' selected. In the center is a white input field containing the text 'Cell Phone Number: (916) 888-8888'. At the bottom are two blue rectangular buttons: 'Send' on the left and 'Cancel' on the right.

Figure – Verify Cell Phone Number - Request for Verification Code

A screenshot of a 'Verify Cell Phone Number' pop-up window. At the top left is the title 'Verify Cell Phone Number:' followed by a grey input field. To the right are two circular icons: one with a question mark and one with an 'X'. Below the title is a red text message '* required field'. In the center is a dropdown menu with the option 'Enter Verification Code' selected. In the bottom right corner of the main window is a small red asterisk symbol. In the center is a white input field containing the text 'Verification Code: *'. At the bottom are two blue rectangular buttons: 'Resend Code' on the left and 'Verify' on the right.

Figure – Verify Cell Phone Number - Enter Verification Code

Verify Cell Phone Number:

? X

* required field

i Verification Code resent.

Enter Verification Code

Verification Code: *

[Resend Code](#) [Verify](#)

Figure – Verify Cell Phone Number - Verification Code Resent

Verify Cell Phone Number:

? X

i Cell phone number verified.

Cell Phone Number Verified

Cell Phone Number: (916) 888-8888

[Done](#)

Figure – Verify Cell Phone Number - Cell Phone Number Verified

Actions/Functions

The following actions are associated with the Verify Cell Phone Number pop-up:

Hyperlink	Function
Send	This button, when selected, will send a 6-digit verification code to the Recipient's cell phone. And displays a data entry field to enter the 'Verification Code' and two buttons 'Resend Code' and 'Verify'.
Cancel	This button, when selected, will close this pop-up and return the user to the View Recipient Timesheet Preferences screen.
Resend Code	This button resends a 6-digit verification code to the user's cell phone and displays a text 'Verification Code resent.'
Verify	This button when selected after the verification code is entered, displays text 'Cell phone number verified'.

Done	This button takes the user back to View Recipient Timesheet Preferences screen.
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Data Elements

The following data elements are specific to the Verify Cell Phone Number pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Verification Code	A data entry field where the user enters the 6-digit code to verify the user's cell phone number.	Data Entry	Yes	N/A	N/A
Cell Phone Number	Displays the user's cell phone number on file.	Text	N/A	N/A	N/A

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Case Attachments

CI	Document Name
CI-822491 - DSD SC Case Attachments IMPLEMENTED	DSD_SC_Case_Attachments.docx

When Attachments is selected from the Case Home content tab, the Case Attachments screen displays by default.

The screenshot shows the CMIPS II Case Management Information Payroll System II interface. The top navigation bar includes 'CMIPS II Case Management Information Payroll System II', a search icon, and a 'Welcome' dropdown. The main menu bar has links for 'My Workspace', 'My Cases', and 'Inbox'. Below the menu is a 'SHORTCUTS' sidebar with links to various case management functions like Case Home, Medi-Cal Eligibility, Contacts, etc. The main content area is titled 'Attachments:' and shows a table of uploaded files. The table columns are 'Action', 'Form Name', 'Uploaded By', 'Uploaded Date', 'Status', and 'Description'. Buttons for 'Upload File...' and 'Attachments History' are visible above the table.

Figure – Case Attachments

Actions/Functions

The following actions are associated with the Case Attachments screen:

Hyperlink	Function
Completed Electronic Forms	Displays the Completed Electronic Form screen.
Upload File	Displays the Upload Case Attachment Pop-Up.
Attachments History	Displays the Attachments History screen.
Archive	Archives the uploaded case attachment.
Restore	Restores a previously archived provider attachment. Note: This action only displays if the attachment was marked for archiving earlier that day.
Download	Downloads the successfully scanned attachment.
Edit	Displays the Modify Attachments Pop-Up.

Data Elements

The following data elements are specific to the Case Attachments screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Form Name	The name of the uploaded attachment/form	Text	Yes	No	No
Uploaded By	The name of the CMIPS User who uploaded the attachment	Text	Yes	No	No
Uploaded Date	The date and time the attachment was uploaded	Date/Time (MM/DD/YYYY HH:MM)	Yes	No	No
Status	The status of the uploaded attachment/form	Text	Yes	No	No
Description	Short Description of the uploaded attachment	Text	No	No	No

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Upload Case Attachment Pop-Up

CI	Document Name
CI-822492 - DSD SC Upload Case Attachment Pop-Up IMPLEMENTED	DSD_SC_Upload_Case_Attachment_Pop-Up.docx

When the Upload Action button is selected from the Case Attachments screen, the Upload Case Attachment Pop-Up displays.

The screenshot shows a modal dialog titled "Upload a File". It contains three input fields: "Upload Attachment: *", "Form: *", and "Description:". The "Upload Attachment" field has a "Browse..." button. The "Form" field is a dropdown menu. The "Description" field is a text input. At the bottom right are "Save" and "Cancel" buttons. A red asterisk (*) is placed next to the "required field" label, which is located above the "Form" field. There are also "?" and "X" icons in the top right corner of the modal.

Figure – Upload Case Attachment Pop-Up

Actions/Functions

The following actions are associated with the Upload Case Attachment Pop-Up:

Hyperlink	Function
Browse	Allows User to select an attachment to upload
Save	Saves the uploaded attachment and navigates back to the Case Attachments Screen
Cancel	Cancels the upload action and navigates back to the Case Attachments Screen

Data Elements

The following data elements are specific to the Upload Case Attachment Pop-Up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Upload Attachment	The name of the selected attachment	Text	Yes	No	No
Form	The name of the selected form being attached	Dropdown	Yes	No	Yes
Description	Short Description of the uploaded attachment	Text	No	No	Yes

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Archive Case Attachment Confirmation Dialog

CI	Document Name
 CI-822582 - DSD SC Archive Case Attachment Confirmation Dialog IMPLEMENTED	DSD_SC_Archive_Case Attachment Confirmation Dialog.docx

When the Archive Action is selected from the Case Attachments Screen, the Archive Case Attachment Confirmation Dialog displays.

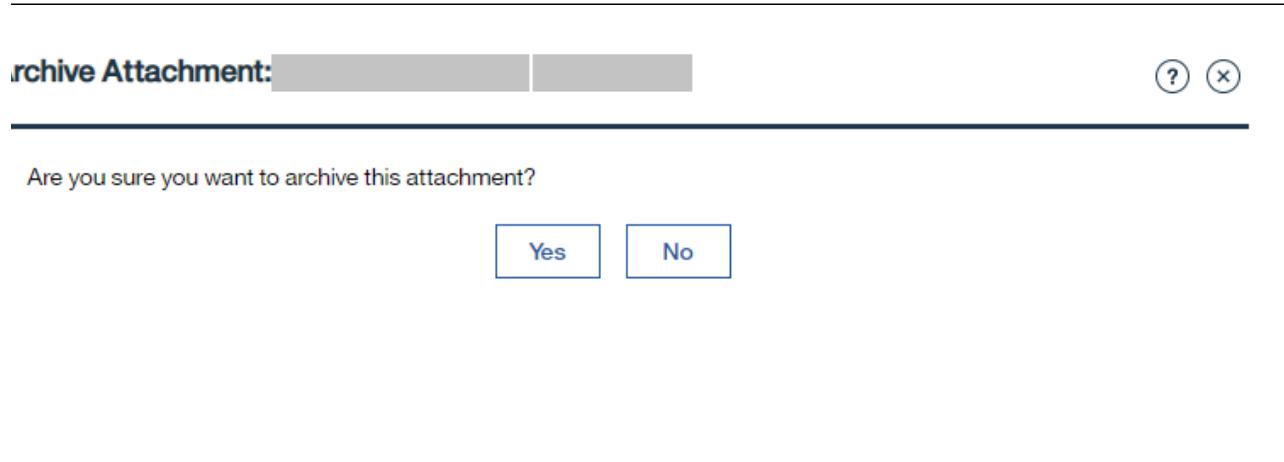


Figure – Archive Case Attachment Confirmation Dialog

Actions/Functions

The following actions are associated with the Archive Case Attachment Confirmation Dialog:

Hyperlink	Function
Yes	Archives the indicated record and returns to the Case Attachments screen
No	Closes the screen and returns to the Case Attachments screen.

Data Elements

There are no data elements associated with the Archive Case Attachment Confirmation Dialog.

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Restore Case Attachment Confirmation Dialog

CI	Document Name
 CI-823383 - DSD SC Restore Case Attachment Confirmation Dialog IMPLEMENTED	DSD_SC_Restore_Case Attachment Confirmation Dialog.docx

When the Restore Action is selected from the Case Attachments Screen, the Restore Case Attachment Confirmation Dialog displays.

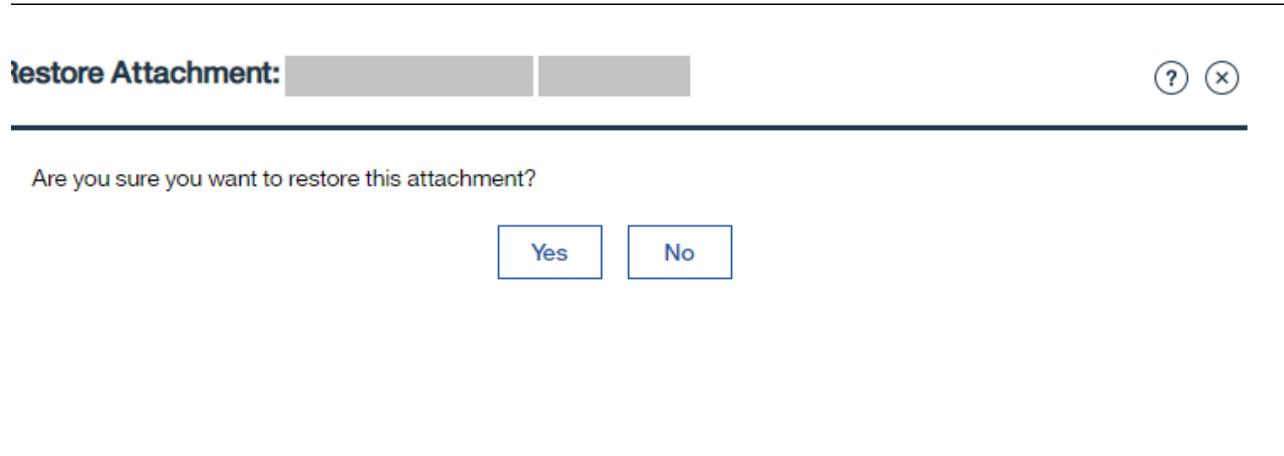


Figure – Restore Case Attachment Confirmation Dialog

Actions/Functions

The following actions are associated with the Restore Case Attachment Confirmation Dialog:

Hyperlink	Function
Yes	Restores the indicated record and returns to the Case Attachments screen
No	Closes the screen and returns to the Case Attachments screen.

Data Elements

There are no data elements associated with the Restore Case Attachment Confirmation Dialog.

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Modify Attachment Description

CI	Document Name
CI-823622 - DSD SC Modify Attachment Description IMPLEMENTED	DSD_SC_Modify_Attachment_Description.docx

When the Edit link is selected from the Case Attachments screen, the Modify Attachment Description pop-up displays.

The screenshot shows a modal dialog titled "Modify Attachment Description". At the top right are a help icon and a close button. Below the title is a note "* required field". The main content area is divided into sections: "Details" (Form Name: SOC 295/SOC 295L - Application for Social Services, Status: Pending Scan, Uploaded By: kbritt001, Uploaded Date: 12/14/2022 15:35), "Description:" (a large text input area), and a footer with "Save" and "Cancel" buttons.

Figure – Modify Attachment Description

Actions/Functions

The following actions are associated with the Case Attachments screen:

Hyperlink	Function
Uploaded By	Displays Case Owner User Home Screen
Save	Saves the description into the database.
Cancel	Closes the popup and take the user to Case Attachments Screen

Data Elements

The following data elements are specific to the Case Attachments screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Form Name	The name of the uploaded attachment/form	Text	Yes	No	No
Status	The status of the uploaded attachment/form	Text	Yes	No	No
Uploaded By	The name of the CMIPS User who uploaded the attachment	Text	Yes	No	No
Uploaded Date	The date and time the attachment was uploaded	MM/DD/YYYY HH:MM	Yes	No	No
Description	Description of the uploaded attachment	Text	No	No	No

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Attachments History

CI	Document Name
CI-823634 - DSD SC Case Attachments History IMPLEMENTED	DSD_SC_Attachments_History.docx

When the Attachments History is selected from the Case Attachments screen, the Case Attachments History screen displays.

Action	Form Name	Uploaded By	Uploaded Date	Last Action By	Last Action Date	Status	Description
Download Restore Delete	SOC 839A - IHSS Cancellation of Authorized Representative	kbritt001	12/22/2022 11:45	kbritt001	12/27/2022 15:57	Archived	Upload 1
	SOC 821 - Assessment of Need for Protective Supervision	kbritt001	12/16/2022 14:58	kbritt001	12/27/2022 16:01	Deleted	upload 1
	SOC 450 - Voluntary Services Certification	kbritt001	12/15/2022 13:24			Archived Failed Scan	Upload 1

Figure – Case Attachments History

Actions/Functions

The following actions are associated with the Case Attachments History screen:

Hyperlink	Function
Upload	Displays the Upload Case Attachment Pop-Up.
Archive	Archives the uploaded case attachment.
Restore	Restores a previously archived provider attachment. Note: This action only displays if the attachment was marked for archiving earlier that day.
Download	Downloads the successfully scanned attachment.
Delete	Causes the document's status to be immediately changed to 'Pending Delete' and trigger its deletion in the overnight batch.
Undelete	Causes the document's status to be immediately changed to 'Archived' and remove the deletion trigger.
Close	Clicking this button takes the user back to Attachments screen.

Data Elements

The following data elements are specific to the Case Attachment History screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Form Name	The name of the uploaded attachment/form	Text	Yes	No	No
Uploaded By	The name of the CMIPS User who uploaded the attachment	Text	Yes	No	No
Uploaded Date	The date and time the attachment was uploaded	MM/DD/YYYY HH: MM	Yes	No	No
Last Action By	The name of the CMIPS User who last uploaded the attachment	Text	Yes	No	No
Last Action Date	The date and time the attachment was last uploaded	MM/DD/YYYY HH: MM	Yes	No	No
Status	The status of the uploaded attachment/form	Text	Yes	No	No
Description	Short Description of the uploaded attachment	Text	No	No	No

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Modify Recipient Timesheet Accommodations

CI

CI-823887 - DSD SC Modify Recipient Timesheet Accommodations IMPLEMENTED

The Modify Recipient Timesheet Accommodations pop-up is accessed when a user in Case Management selects the "Edit Timesheet Accommodation..." button in the Timesheet Accommodations cluster of the View Recipient Timesheet Preferences screen. This pop-up, when displayed, contains a drop-down list of Timesheet Accommodation Preferences that can be saved in Case Management as the Recipient's new Timesheet Accommodation Preference when the user selects, 'Save'. The drop-down is pre-populated with the existing preference option for the user.

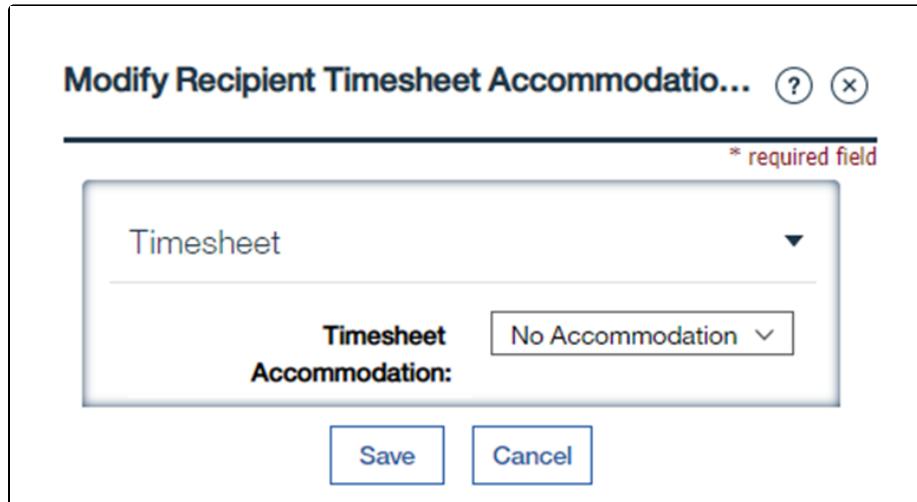


Figure – Modify Recipient Timesheet Accommodations

Actions/Functions

The following actions are associated with the Modify Recipient Timesheet Accommodations pop-up:

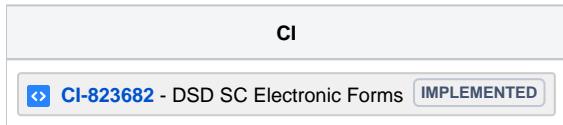
Hyperlink	Function
Save	This button, when selected, commits the selected timesheet accommodation preference as the Recipient's new Timesheet Accommodation if it is a valid selection, replacing any previous existing value. The pop-up then closes to display the View Recipient Timesheet Preferences screen which is refreshed to show the newly selected Timesheet Accommodation Preference. If the selection is not valid, an error message displays, and the pop-up does not close. Note: If Inter-County Transfer (ICT) exists in "Transfer Complete" status, a User from the Sending County, with the right security role (Refer to DSD Appendix A), has access to modify this screen.
Cancel	This button, when selected, closes this pop-up and returns the user to the View Recipient Timesheet Preferences screen without saving the Timesheet Accommodation Preference.

Data Elements

The following data elements are specific to the Modify Recipient Timesheet Accommodations pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Timesheet Accommodation	A drop-down that is populated with 'No Accommodation' value, 'Press or Say' value, and 'Large Font Timesheet' value.	Drop-down list	Yes	Default value is 'No Accommodation' if the Recipient does not have Timesheet Accommodation preference.	Yes

DSD 25/Recip CM & OS – Case Maintenance/Screen Designs/Electronic Forms



When Forms/Correspondence is selected from under the Case Home tab, the Forms screen displays by default. The user will then select the Electronic Forms tab to view and manage electronic forms.

A screenshot of the "Electronic Forms" screen. The interface includes a header with "Case Management Information System" and "Case Number". The main area shows a table of electronic forms with the following columns: Sent to, Status, Due Date, Created On, and Created By. The table lists various forms such as "Request for Timesheets and Other Provider", "Social Services", "For Assignment of Authorized Hours For", and "Confidentiality Agreement". Each row includes a "Pending" status and a timestamp for creation.

Figure – Electronic Forms

Actions/Functions

The following actions are associated with the Electronic Forms screen:

Action	Function
Forms/Correspondence	Displays the Forms/Correspondence screen.
New	Displays the Create Electronic Form Pop-Up.
Edit	Redirects the user to the adaptive electronic form screen.
Send to CSP	Displays the Send Electronic Form to CSP Pop-Up.
Send to ESP	Displays the Send Electronic Form to ESP Pop-Up.
Resend to CSP	Displays the Send Electronic Form to CSP Pop-Up.
Resend to ESP	Displays the Send Electronic Form to ESP Pop-Up.
View	Displays the form in a non-editable PDF.
Accept	Displays the Accept Electronic Form Pop-Up.
Reject	Displays the Reject Electronic Form Pop-Up.
History	Displays the Electronic Form History screen of the corresponding electronic form.

Data Elements

The following data elements are associated with the Electronic Forms screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Form/Correspondence List					
Form Name	The name of the form that was sent.	String	No	No	No
Sent to	The name of the Recipient/County Worker.	String	No	No	No
Status	The status of the form. (Pending, Sent, Ready for Review, Accepted, Rejected)	String	No	No	No
Due Date	The Due Date for 3rd party electronic forms sent to ESP.	Date (MM/DD/YYYY)	No	No	No
Created On	The date and time the message was created.	Date/Time (MM/DD/YYYY)/(HH:MM)	No	No	No
Created By	The name of the County Worker that generated the form.	String	No	No	No

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Create Electronic Form Pop-Up

The screenshot shows a modal dialog box titled "CI". At the top right are a question mark icon and a close button. Below the title, a message says "CI-823712 - DSD SC Create Electronic Form Pop-Up IMPLEMENTED". A note indicates "* required field". The main area contains a dropdown menu set to "English". A scrollable list of form names is displayed, including "Interpreter Services Statement and Confidentiality Agreement", "/SOC 295L - Application for Social Services", "/SOC 332L - Recipient/Employer Responsibility Checklist", "A - Recipient Designation of Provider", "- Voluntary Services Certification", "- Protective Supervision - 24-Hours-A-Day Coverage Plan", "- IHSS Recipient Request For Assignment of Authorized Hours For Provider", and "- Individualized Back-Up Plan and Risk Assessment". At the bottom are three buttons: "Save", "Reset", and "Close".

Figure – Create Electronic Form Pop-Up

Actions/Functions

The following actions are associated with the Create Electronic Form Pop-Up:

Hyperlink	Function
Save	Saves the selection and creates the electronic form that was selected.
Reset	Resets the Create Electronic Form Pop-Up.
Close	Closes the Create Electronic Form Pop-Up and displays the Electronic Forms screen.

Data Elements

The following data elements are specific to the Create Electronic Form Pop-Up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Language	The language that the electronic form will be sent in. Note: This drop down is pre selected according to the Recipient's written language in Case Management.	Drop down list	Yes	Yes	Yes
Form Name	The name of the electronic form and a checkbox to the left for selection.	Checkbox /String	No	No	No

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Send Electronic Form to CSP Pop-Up



When the Send to CSP or Resend to CSP hyperlink is selected on a specific electronic form on the Electronic Forms screen, the Send Electronic Form to CSP Pop-Up displays.

A screenshot of the "Send Electronic Form to CSP" pop-up window. The window title is "Send Electronic Form to CSP:". It contains a required field for "Assigned Worker" with the value "MAtest105", accompanied by a search icon and a clear icon. At the bottom are "Send" and "Close" buttons.

Figure – Send Electronic Form to CSP Pop-Up

Actions/Functions

The following actions are associated with the Send Electronic Form to CSP Pop-Up:

Action	Function
	Opens the User Search screen (CI-67746).
	Clears the Assigned Worker field.
Send	Sends the electronic form to CSP.
Close	Closes the Send Electronic Form to CSP Pop-Up and displays the Electronic Forms screen.

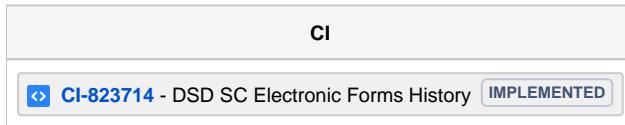
Data Elements

The following data elements are specific to the Send Electronic Form to CSP Pop-Up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Assigned Worker	The name of the assigned worker sending the electronic form.	Input box	No	Yes Note: This field is defaulted to the current user.	Yes
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DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Electronic Forms History



When the History link is selected from a specific form on the Electronic Forms or the Completed Electronic Forms screens, the Electronic Forms History screen for the selected form displays.

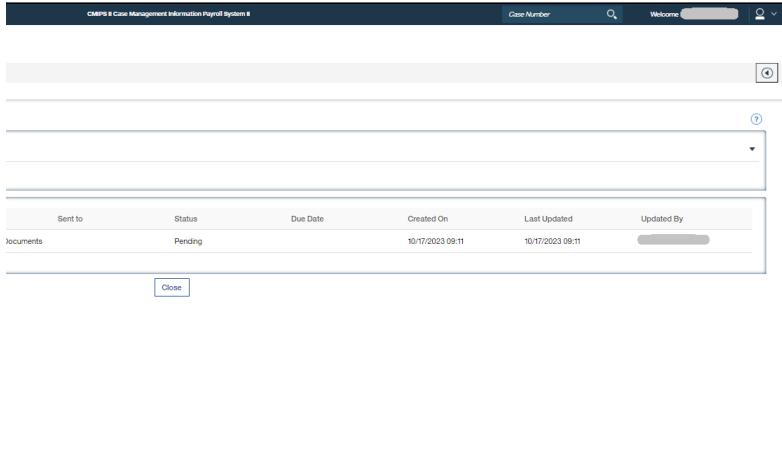


Figure – Electronic Forms History

Actions/Functions

The following actions are associated with the Electronic Forms History screen:

Action	Function
Close	Closes the screen and displays the Electronic Forms screen.

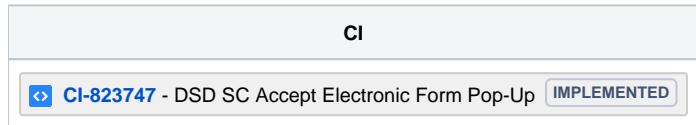
Data Elements

The following data elements are associated with the Electronic Forms History screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Comments	Display comments entered on the Reject Electronic Form Pop-Up.	String	No	No	No
Language	The language in which the electronic form was sent.	String	No	No	No
Form Name	The name of the electronic form.	String	No	No	No
Sent to	The name of the person to whom the electronic form was sent.	String	No	No	No
Status	The last status of the electronic form.	String	No	No	No
Due Date	The Due Date for 3rd party electronic forms sent to ESP.	Date (MM/DD/YYYY)	No	No	No
Created On	The date record the electronic form was created.	Date/Time (MM/DD/YYYY HH:MM)	No	No	No
Last Updated	The date record the electronic form was last updated.	Date/Time (MM/DD/YYYY HH:MM)	No	No	No

Updated By	The user who updated the record of the electronic form.	String	No	No	No
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DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Accept Electronic Form Pop-Up



When the Accept link is selected from a specific form on the Electronic Forms screen, the Accept Electronic Form Pop-Up displays. When a form is accepted, the Accept and Reject hyperlinks on the Electronic Form screen are removed for that form, and the updated form status displays on the Electronic Form History screen.

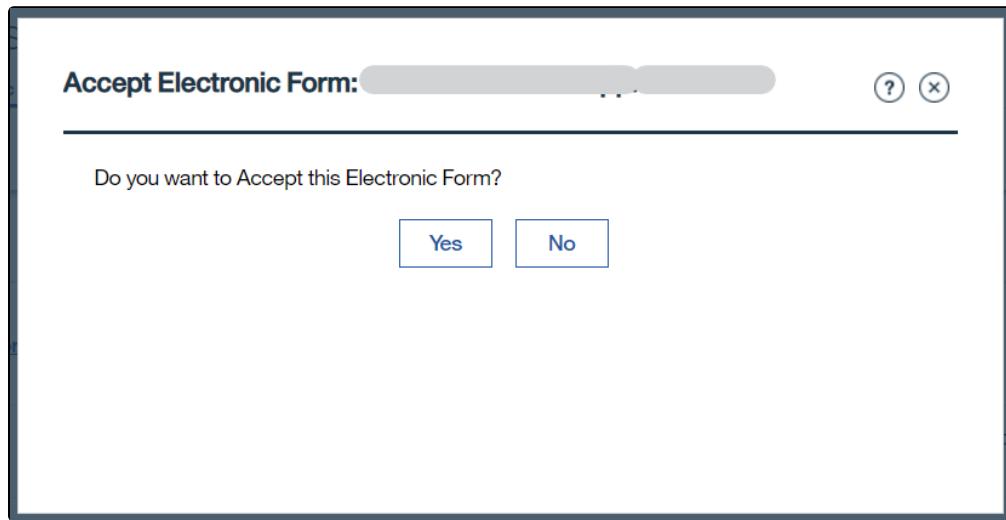


Figure – Accept Electronic Form Pop-Up

Actions/Functions

The following actions are associated with the Accept Electronic Form Pop-Up:

Action	Function
Yes	Accepts the Electronic Form, closes the pop-up and displays the Electronic Forms screen.
No	Closes the pop-up and displays the Electronic Forms screen.

Data Elements

There are no data elements specific to the Accept Electronic Form Pop-Up.

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Reject Electronic Form Pop-Up

The screenshot shows a modal dialog box titled "Reject Electronic Form:" with a gray header bar containing a question mark icon, a close button, and the text "CI-823748 - DSD SC Reject Electronic Form Pop-Up IMPLEMENTED". Below the header is a required field labeled "Comments:" with an empty text area. At the bottom, a message asks "Do you want to Reject or Edit and Resend this Electronic Form?" followed by three buttons: "Reject Form", "Edit and Resend", and "Cancel".

Figure – Reject Electronic Form Pop-Up

Actions/Functions

The following actions are associated with the Reject Electronic Form Pop-Up:

Action	Function
Reject Form	Rejects the form and closes the pop-up.
Edit and Resend	Allows the user to Edit and Resend the electronic form.
Cancel	Closes the pop-up and displays the Electronic Forms screen.

Data Elements

There are no data elements specific to the Reject Electronic Form Pop-Up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Comments	User comments, up to 200 character limit	String	No	Blank	Yes

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Completed Electronic Forms

The screenshot shows a software interface with a header "CI". Below it is a message box containing the text "CI-823759 - DSD SC Completed Electronic Forms" followed by a button labeled "IMPLEMENTED".

When Attachments is selected from the Case Home content tab, the Case Attachments screen displays by default. The user then selects the Completed Electronic Forms tab to view the Recipient's completed electronic forms or to view a form's history. Forms that have been returned by a Recipient to do not display on this screen until the form has been accepted.

The user may also search for Completed Electronic Forms created within a specific date range using the Search Criteria functionality.

The screenshot shows the CMIPS II Case Management Information Payroll System II interface. On the left, there is a vertical sidebar titled "SHORTCUTS" with links to various modules like My Workspace, My Cases, and Inbox. The main content area is titled "Completed Electronic Forms". It features a "Search Criteria" section with "From Date" and "To Date" fields and "Search" and "Reset" buttons. Below this is a table listing completed forms:

Action	Form Name	Sent to	Status	Created On	Created By
View History	SOC 426A - Recipient Designation Of Provider Form	PERM MATEST108	Accepted	04/11/2023 08:49	PERM MATEST108
View History	SOC 426A - Recipient Designation Of Provider Form	TestRizer TestMonfette	Accepted	03/27/2023 10:11	TestNordquist TestWomeldorf
View History	SOC 332 - IHSS Recipient/Employer Responsibility Check List	TestNordquist TestWomeldorf	Accepted	02/28/2023 14:59	TestRizer TestMonfette

Figure – Completed Electronic Forms

Actions/Functions

The following actions are associated with the Completed Electronic Forms screen:

Action	Function
	Opens a date picker, displaying the current month by default.
Search	Updates the screen to display forms created within the date range.
Reset	Clears the 'From Date', 'To Date' and refreshes the page to the default view.

View	Displays the selected electronic form.
History	Displays the Electronic Forms History screen.

Data Elements

The following data elements are specific to the Completed Electronic Forms screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria					
From Date	The earliest form creation date for which the user wishes to search.	Date (MM/DD/YYYY)	No	No	Yes
To Date	The latest form creation date for which the user wishes to search.	Date (MM/DD/YYYY)	No	No	Yes
Completed Electronic Forms Table					
Form Name	The name of the completed form.	String	No	No	No
Sent To	The name of the person to whom the form was sent.	String	No	No	No
Status	The status of the form.	String	No	Accepted	No
Created On	The date and time the form was created.	Date/Time (MM/DD/YYYY HH:MM)	No	No	No
Created By	The name of the user who created the form.	String	No	No	No

DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Send Electronic Form to ESP Pop-Up

The screenshot shows a software interface with a header 'CI' and a sub-header 'CI-823978 - DSD SC Send Electronic Form to ESP Pop-Up'. Below this, a button labeled 'IMPLEMENTED' is visible.

When the Send to ESP or Resend to ESP hyperlink is selected on a specific electronic form on the Electronic Forms screen, the Send Electronic Form to ESP Pop-Up displays.

The screenshot shows a modal dialog titled 'Send Electronic Form to ESP'. It contains fields for 'Action Date:' (with a date picker icon) and 'High Priority' (with a checkbox). At the bottom are 'Send' and 'Close' buttons. A note at the top right indicates '* required field'.

Figure – Send Electronic Form to ESP Pop-Up

Actions/Functions

The following actions are associated with the Send Electronic Form to ESP Pop-Up:

Action	Function
	Opens a date picker, displaying the current month by default.
Send	Sends the electronic form to ESP.
Close	Closes the Send Electronic Form to ESP Pop-Up and displays the Electronic Forms screen.

Data Elements

The following data elements are specific to the Send Electronic Form to ESP Pop-Up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Action Date	Date by which the action must be completed by the Recipient.	Date (MM/DD/ YYYY)	Yes	No	Yes

High Priority	Allows the county worker to indicate if the form/required action is High Priority.	Checkbox	No	Not selected	No
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DSD 25/Recip CM & OS - Case Maintenance/Screen Designs /Edit Electronic Form Pop-Up



When the Edit link is selected from a specific form on the Electronic Forms screen, the Edit Electronic Form Pop-Up displays.

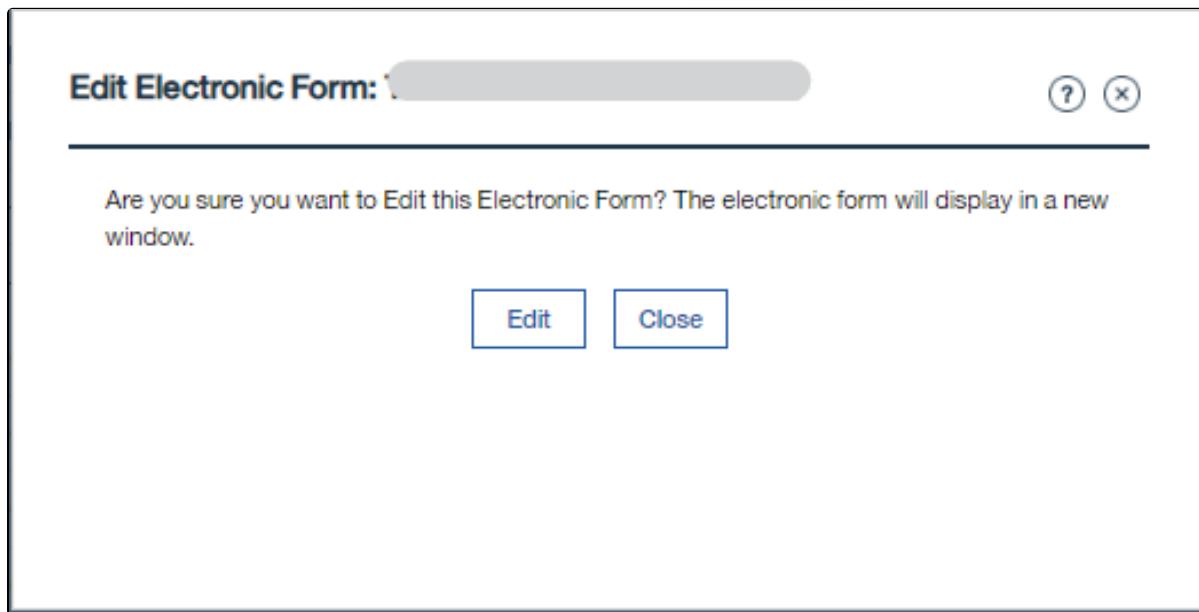


Figure – Edit Electronic Form Pop-Up

Actions/Functions

The following actions are associated with the Edit Electronic Form Pop-Up screen:

Action	Function
Edit	Displays the editable Electronic Form in a new window.
Close	Closes the pop-up and displays the Electronic Forms screen.

Data Elements

There are no data elements specific to the Edit Electronic Form Pop-Up.

DSD 25/Recip CM & OS – Case Maintenance/Navigation Elements

See DSD Section 20 for all CMIPS Navigational elements.

DSD 25/Recip CM & OS – Case Maintenance/Error Messages

This section will define the validation edits on the screens and will document the errors messages that will be displayed for each screen. The indicated error must be resolved or further action will not be allowed.

- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (1-20)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (21-40)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (41-60)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (61-80)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (81-100)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (101-120)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (121-140)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (141-160)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (161-180)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (181-200)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (201-220)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (221-240)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (241-260)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (261-280)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (281-300)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (301-320)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (321-340)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (341-360)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (361-380)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (381-400)
- DSD 25/Recip CM & OS – Case Maintenance/Error Messages (401-420)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
1	12089	 CI-111966 - DSD EM CM 001 <small>IMPLEMENTED</small>	Create WPCS Hours	When an attempt is made to save a Create WPCS Hours screen and WPCS Hours field is blank (or) zero (or) any special characters.	Do not allow the action	Display the error message "The WPCS Hours field must have a valid number of hours"
2			This Error Message was removed with CR 871			
3	12625	 CI-111929 - DSD EM CM 003 <small>IMPLEMENTED</small>	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen AND The Start Date is not the first day of a calendar month and the End Date is not the end date of the same month OR The Start Date is the first day of a calendar month and the End Date is not mid-month of the same month	Do not allow the action	Display the error message, "A prorated WPCS hours segment must begin on the first day or end on the last day of the same service month."
4	12625	 CI-111996 - DSD EM CM 004 <small>IMPLEMENTED</small>	Create WPCS Hours	When an attempt is made to save a Create WPCS Hours screen AND A previous WPCS Hours record exists AND Any date between the Start Date or End Date on the Create WPCS Hours screen overlaps with a date of the previous segment.	Do not allow the action	Display the error message "The WPCS hours segment overlaps with an existing segment."
5	12623 12625 12632 16666 16971	 CI-111944 - DSD EM CM 005 <small>IMPLEMENTED</small>	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen and the Medi-Cal FFP indication for the Eligibility Month is "No" and the Start Date is prior to 05/01/2022.	Do not allow the action	Display the error message, 'WPCS Hours are not allowed when Medi-Cal FFP is 'No' for service months prior to 05/01/2022.'
6			Removed CR606B			
7	12625	 CI-111985 - DSD EM CM 007 <small>IMPLEMENTED</small>	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen and WPCS Hours field is blank (or) zero (or) any special characters.	Do not allow the action	Display the error message "The WPCS Hours field must have a valid number of hours"

8	12625	CI-111946 - DSD EM CM 008 IMPLEMENTED	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen with End Date that is before the Start Date.	Do not allow the action	Display the error message "End Date must be after Start Date"
9		This Error Message was removed with CR 871				
10	12625	CI-111994 - DSD EM CM 010 IMPLEMENTED	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen AND The Start Date is not the first day of a calendar month and the End Date is not the end date of the same month OR The Start Date is the first day of a calendar month and the End Date is not mid-month of the same month	Do not allow the action	Display the error message, "A prorated WPCS hours segment must begin on the first day or end on the last day of the same service month."
11	12625	CI-111972 - DSD EM CM 011 IMPLEMENTED	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen and the WPCS Hours have been decreased to a number of hours less than the WPCS hours already paid for the associated service month(s).	Do not allow the action	Display the error message "WPCS Hours have been paid for the indicated service month (s). Hours may not be decreased below the WPCS hours already paid."
12	12093	CI-111980 - DSD EM CM 012 IMPLEMENTED	Modify County Contractor	When an attempt is made to save a Modify County Contractor screen and the Warrant # field is filled and Paid Date is blank.	Do not allow the action	Display the error message "Paid Date is required when a warrant number is entered"
13	12093	CI-111951 - DSD EM CM 013 IMPLEMENTED	Modify County Contractor	When an attempt is made to save a Modify County Contractor screen and Paid Date field is filled and Warrant # is blank.	Do not allow the action	Display the error message "Warrant number is required when the Paid Date is entered"
14	12093	CI-111933 - DSD EM CM 014 IMPLEMENTED	Modify County Contractor	When an attempt is made to save a Modify County Contractor screen and the Paid Date is before the Processed Date.	Do not allow the action	Display the error message "Paid Date must be later than Processed Date"
15	16818	CI-111942 - DSD EM CM 015 IMPLEMENTED	View County Contractor	When the Contractor Expenditure Report link is selected from the View County Contractor screen and the Warrant # and Paid Date fields are blank.	Do not allow the action	Display the error message "The warrant number and the Paid Date are both required to produce the Contract Expenditure Report"
16	16267	CI-111925 - DSD EM CM 016 IMPLEMENTED	Create Homemaker Timesheet	When a County Homemaker attempts to save a Create Homemaker Timesheet screen and a record already exists for the Homemaker for the indicated month and year (service month).	Do not allow the action	Display the error message "Service Month already exists for the Homemaker"
17	12498	CI-111938 - DSD EM CM 017 IMPLEMENTED	View Homemaker Timesheets	When an attempt is made to save a Recipient record to the View Homemaker Timesheets screen and the indicated hours plus any Homemaker Hours already approved for the service month exceed the Homemaker Hours assigned to the Recipient case for the service month.	Do not allow the action	Display the error message "Timesheet hours exceed Homemaker Assigned Hours for the Service Month"
18	12498	CI-111943 - DSD EM CM 018 IMPLEMENTED	Modify Homemaker Timesheet	When an attempt is made to save a Recipient record to the Modify Homemaker Timesheet screen and the indicated hours plus any Homemaker Hours already approved for the service month exceed the Homemaker Hours assigned to the Recipient case for the service month.	Do not allow the action	Display the error message "Timesheet hours exceed Homemaker Assigned Hours for the Service Month"
19	12121 16267	CI-111993 - DSD EM CM 019 IMPLEMENTED	Homemaker Timesheet Submit for Approval	When an attempt is made to Submit for Approval Timesheets and there are no records in Not Submitted status.	Do not allow the action	Display the error message "All timesheets for this Homemaker have been submitted"
20	16266	CI-111924 - DSD EM CM 020 IMPLEMENTED	Approve Homemaker Timesheet	When the Approve link is selected from the View Homemaker Timesheets screen and the hours indicated for the service month for the Recipient, plus any Homemaker Hours already approved for that service month exceed the number of hours assigned to the Homemaker Mode of Service for that service month.	Do not allow the action	Display the error message "Timesheet hours exceed Homemaker Assigned Hours for the Service Month"

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
21	12461 12463 16893	CI-111921 - DSD EM CM 021 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and the indicated Workplace Hours are greater than Recipient case Total Auth to Purchase After Reduced Hours.	Do not allow the action	Display the error message "Workplace Hours may not exceed case Total Auth to Purchase After Reduced Hours"
22	12461	CI-111970 - DSD EM CM 022 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and the Start Date is not a current or a future month.	Do not allow the action	Display the error message "Start Date must be in the current or a future month"
23	12461	CI-111947 - DSD EM CM 023 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and the End Date is before the Start Date.	Do not allow the action	Display the error message "End Date must be after the Start Date"
24	12461	CI-111928 - DSD EM CM 024 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and a Workplace Hours screen exists without an End Date.	Do not allow the action	Display the error message "Previous Workplace Hours must be End Dated before a new Workplace Hours record may be created"
25	12461 12463	CI-111941 - DSD EM CM 025 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and there are no IHSS Total Auth to Purchase After Reduced Hours for the Start Date and the service month.	Do not allow the action	Display the error message "The Recipient case must have Total Auth to Purchase After Reduced Hours for the Service Month before a Workplace Hours record can be created"
26	12461	CI-111964 - DSD EM CM 026 IMPLEMENTED	Modify Workplace Hours	When an attempt is made to save a Modify Workplace Hours screen and the End Date is before the Start Date.	Do not allow the action	Display the error message "End Date must be after the Start Date"
27	16185	CI-111982 - DSD EM CM 027 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Scheduled Hearing Date is before the Request Date.	Do not allow the action	Display error message "Scheduled Hearing Date cannot be before the Request Date"
28	16185	CI-111956 - DSD EM CM 028 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Reschedule Reason is indicated, but no Scheduled Hearing Date is indicated.	Do not allow the action	Display the error message "Scheduled Hearing Date is required when the Reschedule Reason is indicated"
29	16185	CI-111940 - DSD EM CM 029 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Scheduled Hearing Date is before the Request Date.	Do not allow the action	Display the error message "Scheduled Hearing Date cannot be before the Request Date"
30	16185	CI-111955 - DSD EM CM 030 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Rescheduled Reason is indicated, but no Scheduled Hearing Date is indicated.	Do not allow the action	Display the error message "Scheduled Hearing Date is required when a Reschedule Reason is indicated"
31	16185	CI-111975 - DSD EM CM 031 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and Scheduled Hearing date has changed and the Rescheduled Reason is blank.	Do not allow the action	Display the error message "Reschedule Reason required when the Scheduled Hearing Date is updated"
32	16185 16187	CI-111991 - DSD EM CM 032 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the outcome is other than Conditional Withdrawal, Erroneous Entry, or Complete Withdrawal and the Scheduled Hearing Date is blank.	Do not allow the action.	Display the error message "A Scheduled Hearing Date is required for this Outcome."
33	16188	CI-111984 - DSD EM CM 033 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Outcome Date is before the Request Date.	Do not allow the action	Display the error message "Outcome Date cannot be before the Request Date"
35	16185 16188	CI-111922 - DSD EM CM 035 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Compliance Form Sent Date is before the Outcome Date.	Do not allow the action	Display the error message "Compliance Form Sent Date cannot be before the Outcome Date"
36	16188	CI-111995 - DSD EM CM 036 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and an Outcome other than Pending or Erroneous Entry is indicated and the Outcome Date is blank.	Do not allow the action.	Display the error message "Outcome Date is required when the outcome is indicated."

37	16188	CI-111920 - DSD EM CM 037 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Outcome Date is indicated and the Outcome is blank.	Do not allow the action	Display the error message "Outcome is required when the Outcome Date is indicated"
38	12179	CI-111981 - DSD EM CM 038 IMPLEMENTED	Create Inter-County Transfer	When an attempt is made to save a Create Inter-County Transfer screen and a State Hearing exists with a status other than "Resolved."	Do not allow the action	Display the error message "Inter-County Transfer is not allowed on a case with an active State Hearing"
39	12173	CI-111957 - DSD EM CM 039 IMPLEMENTED	Create Inter-County Transfer	When an attempt is made to save a Create Inter-County Transfer screen and the Recipient case status is other than Eligible or Presumptive Eligible.	Do not allow the action	Display the error message "Inter-County Transfer is not allowed on a case without current IHSS eligibility"
40	12160	CI-111950 - DSD EM CM 040 IMPLEMENTED	Modify Inter-County Transfer	When an attempt is made to save the Modify Inter-County Transfer screen and a user in a county other than the Receiving County selects the Assign Worker.	Do not allow the action	Display the error message, "Only a user in the receiving County may assign a worker"

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
41	12037	CI-111945 - DSD EM CM 041 IMPLEMENTED	Program Evidence (Service Eligibility)	When an attempt is made to save a Program Evidence screen and the current case status is Leave with a reason of "Undervalue disposal of resources" and Authorization Start Date before the Resource Suspension End Date.	Do not allow the action	Displays the error message, "Authorization Start Date must be on or after Leave Status Resource Suspension End Date [MMDDYYYY]"
43	12318	CI-111916 - DSD EM CM 043 IMPLEMENTED	Leave Case	When an attempt is made to save a Leave Case screen and the Reason is "Undervalue disposal of resources" and the Resource Suspension End Date is blank.	Do not allow the action	Displays the error message, "Resource Suspension End Date is required for the indicated Reason"
45	12264	CI-111931 - DSD EM CM 045 IMPLEMENTED	Rescind Case	When an attempt is made to save a Rescind Case screen and the user taking the action is not the Case Owner.	Do not allow the action	Display the error message, "Only the Case Owner may rescind a case"
48	16548	CI-111992 - DSD EM CM 048 IMPLEMENTED	Create Form	When an attempt is made to save a Create Form screen and there is text in the Paramedical Form Text box and the SOC 321 – Paramedical Services form is not selected.	Do not allow the action	Display the error message, "Paramedical Form Text is only allowed when the Paramedical Services Form is selected"
49	12524 16885 16897	CI-111939 - DSD EM CM 049 IMPLEMENTED	Modify and Inactivate Form	When an attempt is made to save a Modify and Inactivate Form screen and the selected Form is a Provider Notification (SOC 858) in Pending status and Inactivate\Not Mailed is indicated.	Do not allow the action	Display the error message, "A Pending status Provider Notification (SOC 858) may not be inactivated."
50	12318	CI-111962 - DSD EM CM 050 IMPLEMENTED	Modify Case Home	When an attempt is made to save a Modify Case Home screen and a Resource Suspension End Date is indicated and the Case Status is not Leave.	Do not allow the action	Display the error message, "Resource Suspension End Date is only allowed on a case with Leave Status case"
51	12003 16113	CI-111949 - DSD EM CM 051 IMPLEMENTED	Modify Case Home	When an attempt is made to save a Modify Case Home screen and the case is in Leave Status and a Resource Suspension End Date is changed to a date prior to the Authorization End Date.	Do not allow the action	Display the error message, "Resource Suspension End Date may not be before case Authorization End Date [MM/DD/YYYY]"
52	12003	CI-111926 - DSD EM CM 052 IMPLEMENTED	Leave Case	When an attempt is made to save a Leave Case screen and the reason is 'Undervalue disposal of resources' and the Funding Source for the current month is not IHSS-R.	Do not allow the action	Displays the error message, "The Reason not valid for the Funding Source indicated"
53	12159	CI-111935 - DSD EM CM 053 IMPLEMENTED	Cancel Transfer	When the Yes link is selected on the Cancel Transfer Request screen and Pending Evidence with the Assessment Type of Inter-County Transfer exists.	Do not allow the action	Display the error message, "A Transfer cancellation is not allowed with Pending 'Inter-County Transfer' Assessment evidence"
54	12160	CI-111997 - DSD EM CM 054 IMPLEMENTED	Delete Pending Evidence (Service Eligibility)	When the Delete Pending Evidence link is selected and the Pending Evidence Assessment Type is Inter-County Transfer and the user taking the action is not a user in the Receiving County.	Do not allow the action	Display the error message, "Deletion of Pending 'Inter-County Transfer' evidence is only permitted for a user in the Receiving County"

58	12516	CI-111932 - DSD EM CM 058 IMPLEMENTED	Reactivate Case	When an attempt is made to save a Reactivate Case screen and the associated Person record Death Outcome is Death Confirmed.	Do not allow the action	Display the error message, "Case Reactivation not allowed for indicated Person Death Outcome."
59	16548	CI-111960 - DSD EM CM 059 IMPLEMENTED	Create Form	When an attempt is made to save a Create Form screen and the user entered more than 700 characters in the Paramedical Form Text field.	Do not allow the action	Display the error message, "Paramedical Form Text is too long (853) - maximum allowed is '700'."
60		This Error Message was removed with CR 871				

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
61	12159	CI-111973 - DSD EM CM 061 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Area Code is other than three numeric digits	Do not allow the action	Display the error message "Area Code must be three numeric digits."
62	12159	CI-111958 - DSD EM CM 062 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Phone Number entered is not seven (7) numeric characters	Do not allow the action	Display the error message "Phone number must be seven numeric digits."
63	12159	CI-111961 - DSD EM CM 063 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Area Code is other than three numeric digits	Do not allow the action	Display the error message "Area Code must be three numeric digits."
64	12159	CI-111965 - DSD EM CM 064 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Phone Number entered is not seven (7) numeric characters	Do not allow the action	Display the error message "Phone number must be seven numeric digits."
65	12159	CI-111990 - DSD EM CM 065 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Extension contains other than numeric characters	Do not allow the action	Display the error message "Phone number extension format must be numeric."
66	12159	CI-111959 - DSD EM CM 066 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Extension contains other than numeric characters	Do not allow the action	Display the error message "Phone number extension format must be numeric."
67	16688	CI-111977 - DSD EM CM 067 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit screen and the Home Visit date is a future date	Do not allow the action	Display the error message, "Initial Home Visit Date may not be a future date."
68	16688	CI-111979 - DSD EM CM 068 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit screen and the Visit Focus field indicates "Recipient" and the Provider field is not blank	Do not allow the action	Display the error message, "Visit Focus does not allow Provider indication."
69	16688	CI-111918 - DSD EM CM 069 IMPLEMENTED	Modify Unannounced Home Visit	When the Save link is selected on the Modify Unannounced Home Visit screen and the Visit Focus field indicates "Recipient" and the Provider field is not blank	Do not allow the action	Display the error message, "Visit Focus does not allow Provider indication."
70	16688	CI-111953 - DSD EM CM 070 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit and the Visit Focus field indicates "Provider" and the Provider field is blank	Do not allow the action	Display the error message, "When Visit Focus is Provider, a Provider must be selected."
71	16688	CI-111927 - DSD EM CM 071 IMPLEMENTED	Modify Unannounced Home Visit	When the Save link is selected on the Modify Unannounced Home Visit and the Visit Focus field indicates "Provider" and the Provider field is blank	Do not allow the action	Display the error message, "When Visit Focus is Provider, a Provider must be selected."

72	16688	CI-111983 - DSD EM CM 072 IMPLEMENTED	Unannounced Home Visit list screen	When the "Inactivate" link is selected for a specific record and that record has an indicated "Outcome"	Do not allow the action	Display the error message, "Inactivate action not allowed on Unannounced Home Visit record with indicated Outcome."
73	12260 16940	CI-111967 - DSD EM CM 073 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected and the Termination Reason No Longer in own home is indicated and the Meets Residency Requirement is not indicated as No longer in own Home	Do not allow the action	Display the error message, "Meets Residency Requirement must match Termination Reason."
74	12260 16940	CI-111954 - DSD EM CM 074 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected and the Meets Residency requirement is not "Non-California Residence" and the Termination Reason is one of the following: <ul style="list-style-type: none">• Out of State longer than 60 days• Out of Country longer than 30 days• Moved out of State	Do not allow the action	Display the error message, "Meets Residency Requirement must match Termination Reason."
75	12260 16940	CI-111963 - DSD EM CM 075 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected and the Termination Reason "Whereabouts unknown" is indicated and the Meets Residency Requirement is not indicated as "Whereabouts unknown"	Do not allow the action	Display the error message, "Meets Residency Requirement must match Termination Reason."
76	16188	CI-111936 - DSD EM CM 076 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome is other than Pending, Conditional Withdrawal or Complete Withdrawal and the Scheduled Hearing Date is blank.	Do not allow the action	Display the error message "A Scheduled Hearing Date is required for this Outcome."
77	16188	CI-111919 - DSD EM CM 077 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Compliance Form Sent Date field is indicated and all other Details fields are blank	Do not allow the action	Display the error message "Compliance Form Sent Date must have an Outcome indicated."
78	16188	CI-111976 - DSD EM CM 078 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Compliance Form Sent Date is before the Outcome Date.	Do not allow the action	Display the error message "Compliance Form Sent Date cannot be before the Outcome Date."
79	16188	CI-111934 - DSD EM CM 079 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and an Outcome other than Pending is indicated and the Outcome Date is blank.	Do not allow the action	Display the error message "Outcome Date is required when the Outcome is indicated."
80	16188	CI-111971 - DSD EM CM 080 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome Date is indicated and the Outcome is blank.	Do not allow the action	Display the error message "Outcome is required when the Outcome Date is indicated"

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
81	16187 16185	CI-111930 - DSD EM CM 081 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome Date is before Scheduled Hearing Date.	Do not allow the action	Display the error message "Outcome Date cannot be before Scheduled Hearing Date."
82	16187 16185	CI-111923 - DSD EM CM 082 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Create State Hearing screen and the Compliance Form Sent Date field is indicated and all other Details fields are blank	Do not allow the action	Display the error message "Compliance Form Sent Date must have an Outcome indicated."
85	16186	CI-111988 - DSD EM CM 085 IMPLEMENTED	Create State Hearing	When an attempt is made to Create State Hearing and request date is before the Application Date.	Do not allow the action	Display the error message "Request Date cannot be before Application Date".
86	16688	CI-111974 - DSD EM CM 086 IMPLEMENTED	Create Unannounced Home Visit	When an attempt is made to Create Unannounced Home Visit and Home Visit Date is before the Application Date.	Do not allow the action	Display the error message "Home Visit Date cannot be before the Application Date".
87	12318	CI-111969 - DSD EM CM 087 IMPLEMENTED	Withdraw Case	When an attempt is made to save a Withdraw Case and Withdrawal Date is before the Application Date.	Do not allow the action	Display the error message "Withdrawal Date cannot be before the Application Date".

88	12318	CI-111978 - DSD EM CM 088 IMPLEMENTED	Leave Case	When an attempt is made to save a Leave Case and Resource Suspension End Date is before Leave Case Authorization End Date.	Do not allow the action	Display the error message "Resource Suspension End Date cannot be before Leave Case Authorization End Date."
89	12260 16113 16940	CI-111968 - DSD EM CM 089 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and an authorization with a future date exists with a Status of Terminated or Leave and the Terminate Case Authorization End Date is after the previous Authorization End Date	Do not allow the action	Display the error message, "Future Authorization with Termination or Leave already exists; verify Authorization."
90	12501	CI-111937 - DSD EM CM 090 IMPLEMENTED	Leave Case	When the Save link is selected on the Leave Case screen and an authorization with a future date exists with a Status of Terminated or Leave and the Leave Case Authorization End Date is after the previous Authorization End Date	Do not allow the action	Display the error message, "Future Authorization with Termination or Leave already exists; verify Authorization."
91	12159	CI-111917 - DSD EM CM 091 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-county Transfer screen and the Receiving County is the same as the Sending County	Do not allow the action	Display the error message, "Sending and Receiving County may not be the same county."
92	12261 12264	CI-111948 - DSD EM CM 092 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case with CIN selection screen <ul style="list-style-type: none"> • And the Termination Reason is other than Recipient Death (NOA TR17) • And the CIN selection does not have active Medi-Cal 	Do not allow the action	Display the error message, "Rescind action not allowed when CIN does not have active Medi-Cal eligibility."
93	12318	CI-116345 - DSD EM CM 093 IMPLEMENTED	Withdraw Case	When the Save link is selected on the Withdraw Case screen and the Withdrawal Date is not the current or a prior date	Do not allow the action	Display the error message "Withdrawal date must be on or before the current date."
94	12318	CI-116346 - DSD EM CM 094 IMPLEMENTED	Withdraw Case	When the Save link is selected on the Withdraw Case screen and the Withdrawal Date is prior to the Application Date	Do not allow the action	Display the error message "Withdrawal date must be on or after the Application Date."
95	12260 16113 16940	CI-116347 - DSD EM CM 095 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Authorization End Date is more than one month in the future	Do not allow the action	Display the error message "Termination Authorization End Date may not be more than one month in the future."
96	16113 16941	CI-116348 - DSD EM CM 096 IMPLEMENTED	Leave Case	When the Save link is selected on the Leave Case screen and the Authorization End Date is more than one month in the future	Do not allow the action	Display the error message "Leave Case Authorization End Date may not be more than one month in the future."
98	12510 20782	CI-116350 - DSD EM CM 098 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen and the current Case Status is Denied, Terminated or Withdrawn and the From Date associated with the Status is the current date	Do not allow the action	Display the Error Message "Case may not be Reactivated the same day as a Denial, Termination or Withdrawal action was taken."
99	12264 16719 16720	CI-117722 - DSD EM CM 099 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case screen and the associated Person record has an Alternative ID Type Social Security Number with a Duplicates indication of "Duplicate SSN" or "Suspect SSN"	Do not allow the action	Display the error message, "Rescind Action not allowed when Alternative ID Type Social Security Number is indicated as [Duplicates value]."
100	16719 16720 20782	CI-117723 - DSD EM CM 100 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen and the associated Person record has an Alternative ID Type Social Security Number with a Duplicates indication of "Duplicate SSN" or "Suspect SSN"	Do not allow the action	Display the error message, "Reactivate Action not allowed when Alternative ID Type Social Security Number is indicated as [Duplicates value]."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
101	12160	CI-117146 - DSD EM CM 101 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the current active evidence has an Authorization End Date prior to the current date	Do not allow the action	Display the error message "Case authorization must be current before Inter-County Transfer can be created."

102	12160	CI-117147 - DSD EM CM 102 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and an Inter-County Transfer record exists with at Status of "In Progress"	Do not allow the action	Display the error message "In Progress Inter-County Transfer exists. User must either Complete or Cancel existing Inter-County Transfer."
103	12159	CI-117148 - DSD EM CM 103 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the New Phone Number indicates an Area Code and the Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Area Code indicated."
104	12159	CI-117149 - DSD EM CM 104 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the New Phone Number indicates an Phone Number and the Area Code field is blank	Do not allow the action	Display the error message "Area Code required if Phone Number indicated."
105	12159	CI-117150 - DSD EM CM 105 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Extension Number indicates an Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Extension Number indicated."
106	12159	CI-117151 - DSD EM CM 106 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the New Phone Number indicates an Area Code and the Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Area Code indicated."
107	12159	CI-117152 - DSD EM CM 107 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the New Phone Number indicates an Phone Number and the Area Code field is blank	Do not allow the action	Display the error message "Area Code required if Phone Number indicated."
108	12159	CI-117153 - DSD EM CM 108 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Extension Number indicates an Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Extension Number indicated."
109	16875	CI-117995 - DSD EM CM 109 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Reason is "Recipient Death" and the associated person record does not have a Date of Death	Do not allow the action	Display the error message, "Date of Death required with selected reason."
110	12037 12510	CI-119149 - DSD EM CM 110 IMPLEMENTED	Create Workplace Hours	When the Save link is selected on the Create Workplace Hours screen and the Workplace Hours Start Date is prior to the Inter-County Transfer Start Date and the Workplace Hours End Date is after the Inter-County Transfer Start Date	Do not allow the action	Display the error message "Workplace Hours Start and End Date may not span Inter-County Transfer Authorization Start Date [MM/DD/YYYY]."
111	16882	CI-290356 - DSD EM CM 111 IMPLEMENTED	Terminate Case	When the Yes link is selected on the Terminate Case screen AND the Termination Reason is Health Care Certification – Not Received AND the Authorization End Date is on or before • The Due Date OR, if indicated, the Good Cause Extension Due Date	Do not allow the action	Display the error Message, "Reason not allowed when Authorization End Date is on or before [Applicable Due Date*]." *Applicable Due Date is either "Due Date" or, if indicated, "Good Cause Extension Due Date"
112	16110 16111 16112	CI-290392 - DSD EM CM 112 IMPLEMENTED	Reactivate Case	When the Save link is selected on the "Reactivate Case" screen and "IHSS Referral Date" is changed to a date more than two weeks prior to the current date	Do not allow the action	Display the error message "Updated Referral Date may not be dated more than two weeks (14 calendar days) prior to the current date."
113	16110 16112	CI-290393 - DSD EM CM 113 IMPLEMENTED	Reactivate Case	When the Save link is selected on the "Reactivate Case" screen and "IHSS Referral Date" is changed to a date future to the displayed IHSS Referral Date	Do not allow the action	Display the error message "IHSS Referral Date may not be changed to a date future to the displayed IHSS Referral Date."

114	12083	CI-290723 - DSD EM CM 114 <small>IMPLEMENTED</small>	Terminate Case	When the Save link is selected on the Terminate Case screen And the selected Termination Reason is "Recipient did not pay IHSS Share of Cost" And the funding source is not IHSS-R	Do not allow the action	Display the error message "Termination Reason not allowed for Funding Source other than IHSS-R."
115	16113	CI-294007 - DSD EM CM 115 <small>IMPLEMENTED</small>	Leave Case	When the Save link is selected on the Leave Case screen And the current case authorization decision is Eligible And the current case Authorization End Date is before the Leave Case Authorization End Date	Do not allow the action	Display the error message, "Most recent case assessment Authorization End Date is in the past. Update case assessment before taking Leave Case or Terminate Case action. Please note the action in the Assessment Narrative."
116	16113	CI-294008 - DSD EM CM 116 <small>IMPLEMENTED</small>	Terminate Case	When the Save link is selected on the Terminate Case screen And the current case authorization decision is Eligible And the current case Authorization End Date is before the Terminate Case Authorization End Date	Do not allow the action	Display the error message, "Most recent case assessment Authorization End Date is in the past. Update case assessment before taking Leave Case or Terminate Case action. Please note the action in the Assessment Narrative."
117	16927	CI-434185 - DSD EM CM 117 <small>IMPLEMENTED</small>	Reactivate Case	When the Save link is selected on the Reactivate Case screen and an SCI search has not been performed	Do not allow the action	Display the error message, "Client Index Number search is required."
118	12318	CI-437005 - DSD EM CM 118 <small>IMPLEMENTED</small>	Terminate Case	When the Save link is selected on the Terminate Case screen and Pending Evidence exists on the case	Do not allow the action	Display the error message, "Please delete this Pending Evidence before processing Leave or Terminate Case action."
119	12318	CI-437004 - DSD EM CM 119 <small>IMPLEMENTED</small>	Leave Case	When the Save link is selected on the Leave Case screen and Pending Evidence exists on the case	Do not allow the action	Display the error message, "Please delete this Pending Evidence before processing Leave or Terminate Case action."
120	16939	CI-444527 - DSD EM CM 120 <small>IMPLEMENTED</small>	Modify Medi-Cal Eligibility	When the Save link is selected on Modify Medi-Cal Eligibility screen and the month MM/YYYY indicated is more than one month future to the current month	Do not allow the action	Display the error message, "Eligibility may not be added for a future month"

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
121	16939	CI-444528 - DSD EM CM 121 <small>IMPLEMENTED</small>	Modify Medi-Cal Eligibility	When the Save link is selected on the Eligibility Month screen and the month MM/YYYY indicated is more than 13 months prior to the current month	Do not allow the action	Display the error message, "Eligibility period being added may not be more than 13 months before the current month."
122	16939	CI-444529 - DSD EM CM 122 <small>IMPLEMENTED</small>	Modify Medi-Cal Eligibility	When the Save link is selected on the Modify Medi-Cal Eligibility screen and the FFP is changed from N to Y and the Medi-Cal Aid Code is not 10, 20 or 60	Do not allow the action	Display the error message, "FFP may only be set to Y when Medi-Cal Aid Code is 10, 20 or 60."
123	16939	CI-444530 - DSD EM CM 123 <small>IMPLEMENTED</small>	Modify Medi-Cal Eligibility	When the Save link is selected on the Modify Medi-Cal Eligibility screen and the FFP has changed from N to Y and the Medi-Cal Aid Code, FFP and Eligibility Status are not an exact match to the previous months records	Do not allow the action	Display the error message, "The month being changed from FFP N to FFP Y must be an exact match for the previous month for Medi-Cal Eligibility Status, Medi-Cal Aid Code and FFP."
124	16939	CI-444531 - DSD EM CM 124 <small>IMPLEMENTED</small>	Modify Medi-Cal Eligibility	When the Save link is selected on the Modify Medi-Cal Eligibility Screen and Eligibility Month has been updated and another field on the screen has been changed	Do not allow the action	Display the error message, "When Eligibility Month is changed no other changes are allowed".
125	16939	CI-444532 - DSD EM CM 125 <small>IMPLEMENTED</small>	Modify Medi-Cal Eligibility	When the Save link is selected on Modify Medi-Cal Eligibility screen and the month is changed to a month which already exists	Do not allow the action	Display the error message, "Modification to an existing MEDS Eligibility month must be made to the existing record."

126	12264 16971	CI-445315 - DSD EM CM 126 IMPLEMENTED	Rescind Case	<p>When the Save link is selected on the Rescind Case screen and any of the following conditions occur:</p> <ul style="list-style-type: none"> Condition: FFP Change – any change to the MEDS Eligibility FFP in the Authorization Period prior to Termination Condition: Benefit Level Change – the case has Share of Cost Evidence and a Cost of Living Adjustment was processed after the case termination Condition: Wage Rate Update – A county Wage Rate Change was processed for the Authorization Period prior to Termination Condition: State Mandated Change - A State Mandated Change was processed for the Authorization Period prior to Termination Condition: Funding Source Change – After the case termination a Provider was terminated from the case with a Termination Begin Date prior to the Case Termination "From" date Condition: CFCO Funding Source Implementation - After the case termination the CFCO Funding Source was implemented. 	Allow the action	<p>Continue to display the Rescind Case screen. Change the "Save" link to a "Continue" link</p> <p>Display the informational message, "Authorization End Date has changed due to [Condition: FFP Change, Benefit Level Change, Wage Rate Update, State Mandated Change, Funding Source Change, or CFCO Funding Source Implementation]. After Rescind action is processed, create and authorize a Change Assessment for period MM /DD/YYYY to MM/DD/YYYY."</p> <p>Where the first MM/DD/YYYY is the first day of the month in which: The FFP changed</p> <p>Or the Benefit Level (COLA) Begin Date</p> <p>Or the Wage Rate Begin Date</p> <p>Or the State Mandated Begin Date</p> <p>Or the Funding Source change occurred due to Provider termination</p> <p>Or the CFCO Funding Source Begin Date</p> <p>Where the second MM/DD/YYYY is the Authorization End Date prior to Termination</p>
127	16941	CI-445316 - DSD EM CM 127 IMPLEMENTED	Leave Case	<p>When the Save link is selected on the Leave Case screen and the Leave Case Authorization End Date is before the latest of either:</p> <ul style="list-style-type: none"> The Case Application Date Or the Initial Assessment Authorization Start Date 	Do not allow the action	Display the error message, "The Leave Case Authorization End Date must be on or after MM/DD/YYYY [display either the Application Date or Initial Assessment Authorization Start Date]."
128	16940	CI-445317 - DSD EM CM 128 IMPLEMENTED	Terminate Case	<p>When the Save link is selected on the Terminate case screen and the Terminate Case Authorization End Date is before the latest of either:</p> <ul style="list-style-type: none"> The Case Application Date Or the Initial Assessment Authorization Start Date 	Do not allow the action	Display the error message, "The Terminate Case Authorization End Date must be on or after MM/DD/YYYY [display either the Application Date or Initial Assessment Authorization Start Date]."
129	12264	CI-445318 - DSD EM CM 129 IMPLEMENTED	Rescind Case	<p>When the Save link is selected on the Rescind Case screen and the current Case Status is Denied or Terminated and the most recent Assessment Type is Conversion</p>	Do not allow the action	Display the error message, "Rescind action is not allowed on a case which was terminated or denied prior to conversion. Please use the Reactivate case process."
130	16940	CI-445378 - DSD EM CM 130 IMPLEMENTED	Terminate Case	<p>When the Save link is selected on the Terminate Case screen and an "In-Progress" Inter-County Transfer exists on the case</p>	Do not allow the action	Display the error message, "Case may not be Terminated when an In-Progress Inter-County Transfer exists."
131	12173	CI-451612 - DSD EM CM 131 IMPLEMENTED	Leave Case	<p>When the Save link is selected on the Leave Case screen and an In-Progress Inter-County Transfer exists</p>	Do not allow the action	The data in this screen will not be saved and the following message displays: "Leave case action not allowed when an In-Progress Inter-County Transfer exists."
132	16963	CI-451611 - DSD EM CM 132 IMPLEMENTED	Leave Case	<p>When the Save link is selected on the Leave Case screen and Authorization End Date is prior to the most recent Inter-County Transfer Authorization Start Date</p>	Do not allow the action	The data in this screen will not be saved and the following message displays: "Leave case action not allowed for a period prior to most recent Inter-County Transfer Authorization Start Date."
133	12072 12073	CI-480775 - DSD EM CM 133 IMPLEMENTED	Create Recipient Overtime Agreement	<p>When the Save link is selected on the Create Recipient Overtime Agreement screen and the Date Received is prior to [MM/DD/YYYY]</p> <p>[MM/DD/YYYY] FLSA Configuration: ROTDeclarationStartDate</p>	Do not allow the action.	Display the error message "The Date Received cannot be before [MM /DD/YYYY]."
134	12072 12073	CI-480770 - DSD EM CM 134 IMPLEMENTED	Create Recipient Overtime Agreement	<p>When the Save link is selected on the Create Recipient Overtime Agreement screen and the date entered is a date in the future</p>	Do not allow the action.	Display the error message "The Date Received cannot be a future date."
135	12072 12073	CI-480809 - DSD EM CM 135 IMPLEMENTED	Create Recipient Overtime Agreement – Multiple records	<p>When the Save link is selected on the Create Recipient Overtime Agreement screen and an "Active" status Recipient Overtime Agreement exists</p>	Do not allow the action.	Display the error message "Only one "Active" status Recipient Overtime Agreement record is allowed. If the existing record is incorrect, please Inactivate the existing record and then another record can be created."

136	20734	 CI-480810 - DSD EM CM 136 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the total hours and minutes entered for any day indication is greater than 24:00 (HH:MM)	Do not allow the action.	Display the error message "Total time entered in a single day field cannot exceed 24:00."
137	20734	 CI-480813 - DSD EM CM 137 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen and the total hours and minutes entered for any day indication is greater than 24:00 (HH:MM)	Do not allow the action.	Display the error message "Total time entered in a single day field cannot exceed 24:00."
138	20734	 CI-480806 - DSD EM CM 138 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the "Total Hours" field is zero (00:00).	Do not allow the action.	Display the error message "Entry is required in at least one daily time entry field."
139	20734	 CI-480772 - DSD EM CM 139 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement and the "Total Hours" field is zero (00:00).	Do not allow the action.	Display the error message "Entry is required in at least one daily time entry field."
140	20734	 CI-480771 - DSD EM CM 140 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement pop-up AND the current Provider status is "On-Leave"	Do not allow the action.	Display the error message "On-Leave status provider may not be selected".

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
141	20734	 CI-480769 - DSD EM CM 141 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and Provider Type does not match the Provider Type on the selected Provider	Do not allow the action.	Display the error message "Provider Type does not match the Provider Type on the selected record. Please update."
142	20734	 CI-480822 - DSD EM CM 142 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement and the "Total" field is greater than 40:00 (HH:MM)	Allow the action	Change "Save" link to "Continue" and display the informational message "Total time entered for the Recipient Workweek Agreement exceeds 40:00. If this is correct, select the Continue link, if not select Cancel and update screen accordingly."
143	20734	 CI-480807 - DSD EM CM 143 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen and the "Total" is greater than 40:00 (HH:MM)	Allow the action	Change "Save" link to "Continue" and display the informational message "Total time entered for the Recipient Workweek Agreement exceeds 40:00. If this is correct, select the Continue link, if not select Cancel and update screen accordingly."
144	20734	 CI-480812 - DSD EM CM 144 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and an "Active" status Recipient Workweek Agreement already exists for the Provider with the same Provider Type	Do not allow the action.	Display the error message "Action not allowed because a Recipient Workweek Agreement already exists for this Provider and Provider Type."
145	20734	 CI-480776 - DSD EM CM 145 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen And the Program Type is WPCS And the user is not a WPCS user	Do not allow the action	Display the error message "A WPCS Workweek Agreement may only be created by a WPCS user."
146	20734	 CI-480938 - DSD EM CM 146 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen And the Program Type is IHSS And the user is not a IHSS user	Do not allow the action	Display the error message "A IHSS Workweek Agreement may only be created by an IHSS user."
147	20734	 CI-480939 - DSD EM CM 147 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen And the Program Type is WPCS And the user is not a WPCS user	Do not allow the action	Display the error message "A WPCS Workweek Agreement may only be created by a WPCS user."
148	20734	 CI-480940 - DSD EM CM 148 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen And the Program Type is IHSS And the user is not a IHSS user	Do not allow the action	Display the error message "A IHSS Workweek Agreement may only be created by an IHSS user."

149	20743	CI-480977 - DSD EM CM 149 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement and the "Total Hours" entered are greater than the Recipient Weekly Authorized Hours for the current, if available, or latest authorization month	Do not allow the action.	Display the error message "Total Hours may not exceed the Recipient Weekly Authorized Hours [XX:XX]".
150	20743	CI-480978 - DSD EM CM 150 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement and the "Total Hours" entered are greater than the Recipient Weekly Authorized Hours for the current, if available, or latest authorization month	Do not allow the action.	Display the error message "Total Hours may not exceed the Recipient Weekly Authorized Hours [XX:XX]".
151	20734	CI-480979 - DSD EM CM 151 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the From Date is not the first day of a month	Do not allow the action	Display the error message, "From Date must be the first day of a month."
152	20734	CI-480980 - DSD EM CM 152 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the To Date is not the last day of a month	Do not allow the action	Display the error message, "To Date must be the last day of a month."
153	20734	CI-480981 - DSD EM CM 153 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the span of the From Date and To Date exceeds 12 calendar months	Do not allow the action	Display the error message, "Search is limited to a twelve (12) calendar month period. Please adjust From or To dates."
154		Removed due to conflict with BR #116 – DSD Section 25				
155	20734	CI-480983 - DSD EM CM 155 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the To Date is before the From Date	Do not allow the action	Display the error message, "To Date must be after the From Date."
156	20734	CI-480984 - DSD EM CM 156 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the most recent Recipient Workweek Agreement has the system high date as the End Date and the Begin Date is equal to or before the most recent Recipient Workweek Agreement Begin Date	Do not allow the action	Display the error message, "Begin Date must be at least one day after the Begin Date on the most recent Recipient Workweek Agreement."
157	20734	CI-480985 - DSD EM CM 157 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the Begin Date is before the FLSA Config SOC2256StartDate	Do not allow the action	Display the error message, "Begin Date may not be before MM/DD/YYYY." MM/DD/YYYY = FLSA Config SOC2256StartDate
158	20734	CI-480986 - DSD EM CM 158 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the Provider Type is WPCS and the Total Hours is greater than WPCS Hours for the month	Do not allow the action	Display the error message, "Total Hours may not exceed WPCS Hours for the month."
159	20734	CI-480987 - DSD EM CM 159 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen and the Provider Type is WPCS and the Total Hours is greater than WPCS Hours for the month	Do not allow the action	Display the error message, "Total Hours may not exceed WPCS Hours for the month."
160	20734	CI-480988 - DSD EM CM 160 IMPLEMENTED	Inactivate Recipient Workweek Agreement	When the "Yes" link is selected on the Inactive Recipient Workweek Agreement confirmation screen and the Program Type is IHSS and the user is not an IHSS user	Do not allow the action	Display the error message "An IHSS Workweek Agreement record may only be inactivated by an IHSS user."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
161	20734	CI-480989 - DSD EM CM 161 IMPLEMENTED	Inactivate Recipient Workweek Agreement	When the "Yes" link is selected on the Inactive Recipient Workweek Agreement confirmation screen and the Program Type is WPCS and the user is not a WPCS user	Do not allow the action	Display the error message "A WPCS Workweek Agreement record may only be inactivated by a WPCS user."
162			Removed via CR 1040			
163			Removed via CR 1134			
164			Removed via CR 1040			
165			Removed via CR 1134			
166			Removed via CR 1040			
167			Removed via CR 1134			
168			Removed via CR 1040			
169			Removed via CR 1134			
170		CI-486324 - DSD EM CM 170 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
171		CI-486325 - DSD EM CM 171 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
172		CI-486326 - DSD EM CM 172 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
173		CI-486327 - DSD EM CM 173 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
174		CI-486328 - DSD EM CM 174 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
175		CI-486329 - DSD EM CM 175 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
176			Removed with CR 1199			
177		CI-486331 - DSD EM CM 177 CANCELLED	Cancelled by ASR Sprint 11 Team 1&2			
178	20782	CI-489589 - DSD EM CM 178 IMPLEMENTED	Reactivate Case with IHSS Referral Date is on or before most recent "Eligible" authorization segment	When the Save link is selected on the Reactivate Case screen and IHSS Referral Date indicated is equal or prior to the Authorization End Date on the most recent "Eligible" authorization record	Do not allow the action	Display the error message, "Reactivate Action Referral Date must be at least one day after the Authorization End Date [MM/DD/YYYY] for the most recent 'Eligible' authorization." *MM/DD/YYYY is Authorization End Date of most recent Eligible Authorization segment

179	16647 16940	CI-489590 - DSD EM CM 179 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Reason is Recipient Death and the Authorization End Date does not match the Date of Death	Do not allow the action	Display the error message, "Authorization End Date must match Date of Death [MM/DD/YYYY] on the Person Home when Termination Reason is Recipient Death."
180	16940	CI-489591 - DSD EM CM 180 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Authorization End Date is a date before the most recent Inter-County Transfer Authorization Start Date and the Termination Reason is other than Recipient Death	Do not allow the action	Display the error message, "Case may not be terminated for [Terminate Reason] on a date prior to the Inter-County Transfer Start Date [MM/DD/YYYY]. Terminate Case Authorization End Date must be on or after [MM/DD/YYYY]." Both MM/DD/YYYY fields are populated with the most recent Inter-County Transfer Authorization Start Date

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
181	16940	CI-489592 - DSD EM CM 181 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Termination Reason is Health Care Certification – Not Received AND the Health Care Certification Type is other than blank	Do not allow the action	Display the error message, 'Case may not be terminated for "Health Care Certification – Not Received" when the Health Care Certification Type is other than blank.'
182	12623	CI-489593 - DSD EM CM 182 IMPLEMENTED	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen with End Date that is before the Start Date.	Do not allow the action	Display the error message "End Date must be after Start Date."
183	12623	CI-489594 - DSD EM CM 183 IMPLEMENTED	Modify WPCS Hours	When the Save link is selected on the Modify WPCS Hours screen AND A previous WPCS Hours records exists AND Any date between the Start Date or End Date on the Modify WPCS Hours screen overlaps with a date of the previous segment.	Do not allow the action	Display the error message "The modified WPCS hours segment overlaps with an existing segment."
184	12623	CI-489595 - DSD EM CM 184 IMPLEMENTED	Modify WPCS Hours	When the Save link is selected on the Modify WPCS Hours screen AND A date within the authorization period entered is prior to 05/01/2022 AND The Medi-Cal FFP indication for that service month is 'No'.	Do not allow the action	Display the error message "WPCS Hours are not allowed when Medi-Cal FFP is 'No' for service months prior to 05/01/2022."
185	12623	CI-489596 - DSD EM CM 185 IMPLEMENTED	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen and WPCS Start Date is before the most recent Initial Assessment Authorization Start Date	Do not allow the action	Display the error message "WPCS Hours Start Date may not be before the most recent Initial Assessment Authorization Start Date [MM/DD/YYYY]." MM/DD/YYYY = Most recent Initial Assessment Authorization Start Date
186	12623	CI-489597 - DSD EM CM 186 IMPLEMENTED	Modify WPCS Hours	When the Save link is selected on the Modify WPCS Hours screen and WPCS Start Date is before the most recent Initial Assessment Authorization Start Date	Do not allow the action	Display the error message "WPCS Hours Start Date may not be before the most recent Initial Assessment Authorization Start Date [MM/DD/YYYY]." MM/DD/YYYY = Most recent Initial Assessment Authorization Start Date

187	20782	CI-489598 - DSD EM CM 187 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen and the most recent Inter-County Transfer Authorization Start Date is in the same calendar month as the current "IHSS Referral Date" or if the IHSS Referral Date is one day following the most recent Termination Authorization End Date And the user taking the "Reactive" action is in the same county as the most recent Inter-County Transfer "Sending County"	Do not allow the action	Display the error message, "Reactivate Case action not allowed. Please have [County 1] process the Rescind Case action and perform an Inter-County Transfer to [County 2] County." [County 1 = Current ICT Receiving County; County 2 = Current ICT Sending County]
188	20804	CI-497794 - DSD EM CM 188 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected on the Modify and Inactivate Form screen AND The Regenerate check box on the BVI Format cluster is selected AND The Status on the BVI Format cluster is Pending Generation	Do not allow the action	Display the message: "Regenerate Action not allowed when BVI document is in Pending Generation Status."
189		Removed with CR 1048				
190		Removed with CR 1048				
191		Removed with CR 1048				
192		Removed with CR 1048				
193		Removed with CR 1048				
194		Removed with CR 1048				
195	20770	CI-497878 - DSD EM CM 195 IMPLEMENTED	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The Notice of Action Option of "Large Font NOA" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
196	20770	CI-497879 - DSD EM CM 196 IMPLEMENTED	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The Notice of Action Option of "Large Font NOA" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
197	20770	CI-497880 - DSD EM CM 197 IMPLEMENTED	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The IHSS Required Forms Option of "Large Font Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
198	20770	CI-497881 - DSD EM CM 198 IMPLEMENTED	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The IHSS Required Forms Option of "Large Font Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
199		CI-497882 - DSD EM CM 199 CANCELLED	Cancelled by <! [CDATA[CR115 CGI M&O – PSR – EVV Simplification			

200		 CI-497883 - DSD EM CM 200 CANCELLED	Cancelled by <! [CDATA[CR115 CGI M&O – PSR – EVV Simplification			
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No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
201	20770	 CI-497884 - DSD EM CM 201 IMPLEMENTED	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The Notice of Action Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
202	20770	 CI-497885 - DSD EM CM 202 IMPLEMENTED	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The Notice of Action Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
203	20770	 CI-497886 - DSD EM CM 203 IMPLEMENTED	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The IHSS Required Forms Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
204	20770	 CI-497887 - DSD EM CM 204 IMPLEMENTED	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The IHSS Required Forms Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
205		 CI-497888 - DSD EM CM 205 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification			
206		 CI-497889 - DSD EM CM 206 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification			
207		 CI-497890 - DSD EM CM 207 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification			

208		CI-497891 - DSD EM CM 208 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
209	20770	CI-497892 - DSD EM CM 209 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's NOAs will be generated in English only."
210	20770	CI-497893 - DSD EM CM 210 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's NOAs will be generated in English only."
211	20770	CI-497894 - DSD EM CM 211 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required forms is not available in the indicated Recipient's Written Language. It will be generated in English."
212	20770	CI-497895 - DSD EM CM 212 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required forms is not available in the indicated Recipient's Written Language. It will be generated in English."
213		CI-497896 - DSD EM CM 213 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
214		CI-497897 - DSD EM CM 214 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
215			Removed with CR 980			
216			Removed with CR 980			
217		CI-497900 - DSD EM CM 217 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			

218		CI-497901 - DSD EM CM 218 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
219			Removed with CR 1134			
220			Removed with CR 1134			

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
221	20799	CI-497914 - DSD EM CM 221 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's Notice of Action is not available in the Recipient's indicated Written Language."
222	20799	CI-497915 - DSD EM CM 222 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's Notice of Action is not available in the Recipient's indicated Written Language."
223			Removed with CR 1134			
224			Removed with CR 1134			
225			Removed with CR 1134			
226			Removed with CR 1134			
227	20734	CI-498700 - DSD EM CM 227 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement and there are entries in the Weekly field and entries in any of the Sunday through Saturday fields	Do not allow the action	Display the error message, "Hours entry is allowed in either the Weekly field or in one or more of the Sunday through Saturday daily fields, not both. Please update as appropriate."
228	20734	CI-498701 - DSD EM CM 228 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement and there are entries in the Weekly field and entries in any of the Sunday through Saturday fields	Do not allow the action	Display the error message, "Hours entry is allowed in either the Weekly field or in one or more of the Sunday through Saturday daily fields, not both. Please update as appropriate."
229	12445 12455 20809	CI-500948 - DSD EM CM 229 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" is selected AND The Notice of Action Option of "Braille Documents" is selected AND The IHSS Required Forms Option of "Braille Documents" is selected AND The Recipient's written language indication is other than "English"	Allow the action with confirmation.	Change the Save link to Continue and display the message: "Notice of Actions and IHSS Required Forms will be produced in U. S. English Braille only."

230	12445 12455 20809	CI-500949 - DSD EM CM 230 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" is selected AND The Notice of Action Option of "Braille Documents" is selected AND The IHSS Required Forms Option of "Braille Documents" is selected AND The Recipient's written language indication is other than "English"	Allow the action with confirmation.	Change the Save link to Continue and display the message: "Notice of Actions and IHSS Required Forms will be produced in U. S. English Braille only."
231			Removed with CR 1134			
232			Removed with CR 1134			
233	20817	CI-507517 - DSD EM CM 233 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Suppress NOA" check box is selected and the Comments box is blank	Do not allow the action	Display the error message, "When the Suppress NOA check box is selected a comment is required."
234	20817	CI-507522 - DSD EM CM 234 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected on the Modify and Inactive Form screen and the Suppress NOA checkbox is selected AND the Assessment Type is Initial Assessment	Do not allow the action	Display the error message, "Action not allowed when case Assessment Type is Initial Assessment."
235	20817	CI-507514 - DSD EM CM 235 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the status is Suppressed AND a user has unselected the Suppress NOA check box	Do not allow the action	Display the error message, "Action is not allowed when the Status is Suppressed."
236	20817	CI-507520 - DSD EM CM 236 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Suppress NOA" check box is selected AND the status is other than "Pending" or "Pending Reprint"	Do not allow the action	Display the error message, "Only a NOA in Pending or Pending Reprint status can be suppressed."
237	20817	CI-507518 - DSD EM CM 237 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Suppress NOA" check box is selected AND the Form is not a NOA	Do not allow the action	Display the error message, "Only a NOA in Pending or Pending Reprint status can be suppressed."
238	20816	CI-507516 - DSD EM CM 238 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected AND the Status is Pending AND any field in the "Reprint in Another Language" cluster has been indicated	Do not allow the action	Display the error message, "Action not allowed for a NOA in Pending status."
239	20816	CI-507521 - DSD EM CM 239 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Language" in the "Reprint in Another Language" cluster is the same as either the original NOA language or the Language of a NOA already reprinted	Do not allow the action	Display the error message, "The reprint Language cannot be the same as previous NOA language."
240	20816	CI-507515 - DSD EM CM 240 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected on the Modify and Inactivate Form screen AND the "Reprint in Another Language" cluster is indicated AND the associated NOA has already been reprinted twice	Do not allow the action	Display the error message, "Original NOA may only be reprinted twice. Please see Forms History screen for the pdf of the reprinted languages."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
241	20816	CI-507524 - DSD EM CM 241 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Language" is indicated in the "Reprint in Another Language" cluster AND the Form is not a NOA	Do not allow the action	Display the error message, the "Reprint in Another Language" action is only allowed on NOAs."

242	20816	CI-507523 - DSD EM CM 242 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the Modify and Inactive Form screen and the Correspondence Details Status is Pending Reprint And the "Print in Another Language" field has been modified	Do not allow the action	Display the error message "Changes to Print in Another Language are not allowed when Correspondence Details Status is Pending Reprint."
243	20816	CI-507519 - DSD EM CM 243 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Inactivate/Not Mailed" check box is selected AND the status is "Pending" or "Pending Reprint" AND the Form is a NOA	Do not allow the action	Display the error message, "A NOA in Pending or Pending Reprint status may not be inactivated."
244	16187	CI-507540 - DSD EM CM 244 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome is Erroneous Entry.	Do not allow the action.	Display the error message "Indicated Outcome not valid."
245	20905	CI-675580 - DSD EM CM 245 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Program Type is IHSS AND the user is a WPCS user	Do not allow action	Display the error message, "Action not allowed for a WPCS user when the Program Type is IHSS."
246	20905	CI-675581 - DSD EM CM 246 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Program Type is WPCS AND the user is a IHSS user	Do not allow action	Display the error message, "Action not allowed for an IHSS user when the Program Type is WPCS."
247	20905	CI-675582 - DSD EM CM 247 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Approved Hours are greater than the Requested Hours	Do not allow action	Display the error message, "Approved Hours cannot be greater than the Requested Hours."
248	20905	CI-675583 - DSD EM CM 248 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Comment field contains characters other than English alpha or numeric characters	Do not allow action	Display the error message, "Comment field allows only English language alpha, numeric and special characters." The following special characters are allowed: (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < () : ; , [@].)
249	20905	CI-675584 - DSD EM CM 249 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Frequency is set to "One-Time" AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."
250	20905	CI-675585 - DSD EM CM 250 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Frequency is set to "On-Going" AND Request Outcome is Denied or Approved AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."
251	20905	CI-675586 - DSD EM CM 251 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Outcome Date is blank AND the Approved or any of the Denied reasons are chosen	Do not allow action	Display the error message, "Outcome Date is required when the Outcome is Approved or any of the Denied indications."
252	20905	CI-675587 - DSD EM CM 252 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Outcome Date is indicated AND the outcome is not Approved or any of the Denied conditions	Do not allow action	Display the error message, "Outcome of Approved or any of the Denied indications is required when the Outcome Date is indicated."
253	20905	CI-675588 - DSD EM CM 253 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND greater than 1000 characters are entered in the Comment field	Do not allow action	Display the error message, "Comments' is too long (XXXX) - maximum allowed is '1000'." [XXXX] = Number of characters 253 (Centered in field)

254	20905	CI-675589 - DSD EM CM 254 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND Program Type is IHSS AND the user is a WPCS user	Do not allow action	Display the error message, "Action not allowed for a WPCS user when the Program Type is IHSS."
255	20905	CI-675590 - DSD EM CM 255 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND Program Type is WPCS AND the user is a IHSS user	Do not allow action	Display the error message, "Action not allowed for an IHSS user when the Program Type is WPCS."
256	20905	CI-675591 - DSD EM CM 256 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Approved Hours are greater than the Requested Hours	Do not allow action	Display the error message, "Approved Hours cannot be greater than the Requested Hours."
257	20905	CI-675592 - DSD EM CM 257 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Comment field contains characters other than English alpha or numeric characters	Do not allow action	Display the error message, "Comment field allows only English language alpha, numeric and special characters." The following special characters are allowed: (- ! # \$ % & * + = ? ` { } ~ ^ - \ " < () : ; , [@].)
258	20905	CI-675593 - DSD EM CM 258 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Frequency is set to "One-Time" AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."
259	20905	CI-675594 - DSD EM CM 259 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND Frequency is set to "On-Going" AND Request Outcome is Denied AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."
260	20905	CI-675595 - DSD EM CM 260 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND Frequency is set to "On-Going" AND Request Outcome is Approved AND the current date is on or before the Outcome Letter Date AND Flexible Hours End Date is populated with a date other than 12/31/9999	Do not allow action	Display the error message, "Flexible Hours End Date may not be assigned prior to the generation of the Outcome Letter Date [MM/DD/YYYY]." MM/DD/YYYY – Outcome Letter Date

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
261	20905	CI-675596 - DSD EM CM 261 <small>IMPLEMENTED</small>	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Cancellation Letter Date field is indicated AND the Flexible Hours End Date has been modified	Do not allow the action	Display the error message, "Flexible Hours End Date may not be modified when Cancellation Letter Date is indicated."
262	20905	CI-675597 - DSD EM CM 262 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Outcome Date is blank AND the outcome is Approved or any of the Denied conditions	Do not allow action	Display the error message, "Outcome Date is required when the Outcome is Approved or any of the Denied indications."

263	20905	 CI-675598 - DSD EM CM 263 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Outcome Date is indicated AND the outcome is not Approved or any of the Denied conditions	Do not allow action	Display the error message "An Outcome of Approved or, any of the Denied indications is required when the Outcome Date is indicated."
264	20905	 CI-675599 - DSD EM CM 264 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND greater than 1000 characters are entered in the Comment field	Do not allow action	Display the error message, "The value entered is too long [XXXX] - maximum allowed is '1,000'" [XXXX] = Number of entered in field
265	20905	 CI-675600 - DSD EM CM 265 <small>IMPLEMENTED</small>	Inactivate	When the Yes link is selected on the Inactive Recipient Flexible Hours confirmation screen AND timesheets have been processed for the service month(s) indicated on the Flexible Hours screen AND the overtime hours paid for the service month(s) exceed the Monthly Overtime Maximum	Do not allow action	Display the error message, "Inactivate action not allowed when Flexible Hours have been paid."
266	20905	 CI-675601 - DSD EM CM 266 <small>IMPLEMENTED</small>	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Approved outcome is indicated AND any Denied outcome is also indicated	Do not allow the action	Display the error message, "Request Outcome must be Indicated as either Approved or Denied, but not both."
267	20905	 CI-675602 - DSD EM CM 267 <small>IMPLEMENTED</small>	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Approved outcome is indicated AND any Denied outcome is also indicated	Do not allow the action	Display the error message, "Request Outcome must be Indicated as either Approved or Denied, but not both."
268	20905	 CI-675603 - DSD EM CM 268 <small>IMPLEMENTED</small>	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Service Month and Service Year is any calendar month prior to the FLSAConfig:FlexibleHoursStartDate	Do not allow the action	Display the error message, "Flexible Hours Month and Year may not be before MONTH YYYY." MONTH YYYY = FLSAConfig:FlexibleHoursStartDate
269	20905	 CI-675604 - DSD EM CM 269 <small>IMPLEMENTED</small>	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Service Month and Service Year is for any calendar month prior to the FLSAConfig:FlexibleHoursStartDate	Do not allow the action	Display the error message, "Flexible Hours Month and Year may not be before MONTH YYYY." MONTH YYYY = FLSAConfig:FlexibleHoursStartDate
270	20905	 CI-675605 - DSD EM CM 270 <small>IMPLEMENTED</small>	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND County Approved Hours are greater than the FLSAConfig:FlexibleHoursLimit	Do not allow the action	Display the error message, "Approved Flexible Hours may not exceed FLSAConfig:FlexibleHoursLimit." FLSAConfig:FlexibleHoursLimit = HHH:MM
271	20905	 CI-675606 - DSD EM CM 271 <small>IMPLEMENTED</small>	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND County Approved Hours are greater than the FLSAConfig:FlexibleHoursLimit	Do not allow the action	Display the error message, "Approved Flexible Hours may not exceed FLSAConfig:FlexibleHoursLimit." FLSAConfig:FlexibleHoursLimit = HHH:MM
272	20905	 CI-675607 - DSD EM CM 272 <small>IMPLEMENTED</small>	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Month and Year indicated is more the FLSAConfig:FlexibleHoursBackDate before the current month	Do not allow the action	Display the error message, "Flexible Hours may not be requested more than [FLSAConfig:FlexibleHoursBackDate] month prior to the current month."
273	20905	 CI-675608 - DSD EM CM 273 <small>IMPLEMENTED</small>	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Month and Year indicated is more the FLSAConfig:FlexibleHoursBackDate before the current month AND the Outcome Letter Date is not populated	Do not allow the action	Display the error message, "Flexible Hours may not be requested more than [FLSAConfig:FlexibleHoursBackDate] month prior to the current month."

274	20905	CI-675609 - DSD EM CM 274 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the IHSS Auth to Purchase after Adjusted hours is 0:00 for the entire MONTH and YEAR indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until IHSS Hours are authorized for the Month and Year being requested."
275	20905	CI-675610 - DSD EM CM 275 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the IHSS Auth to Purchase after Adjusted hours is 0:00 for the entire MONTH and YEAR indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until IHSS Hours are authorized for the Month and Year being requested."
276	20905	CI-675611 - DSD EM CM 276 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Program Type is WPCS AND the approved WPCS Hours are 0:00 for the entire MONTH and YYYY indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until WPCS Hours are approved for the Month and Year being requested."
277	20905	CI-675612 - DSD EM CM 277 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Program Type is WPCS AND the approved WPCS Hours are 0:00 for the entire MONTH and YYYY indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until WPCS Hours are approved for the Month and Year being requested."
278	20905	CI-675613 - DSD EM CM 278 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the case is in Pending or Terminated Status for the entire Month and Year indicated	Do not allow the action	Display the error message, "Flexible Hours may not be added for a period when the recipient case is in Pending or Terminated Status."
279	20905	CI-675614 - DSD EM CM 279 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the case is in Pending or Terminated Status for the entire Month and Year indicated	Do not allow the action	Display the error message, "Flexible Hours may not be added for a period when the recipient case is in Pending or Terminated Status."
280	20905	CI-675615 - DSD EM CM 280 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Outcome is Approved AND the County Approved Hours is zero (0:00) or the field is blank	Do not allow the action	Display the error message, "Approved Flexible Hours must have County Approved Hours greater than 0:00."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
281	20905	CI-675616 - DSD EM CM 281 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Outcome is Approved AND the County Approved Hours is zero (0:00) or the field is blank	Do not allow the action	Display the error message, "Approved Flexible Hours must have County Approved Hours greater than 0:00."
282	20905	CI-675617 - DSD EM CM 282 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Outcome is any of the Denied reasons AND the Recipient Requested Hours is zero (0:00) OR the County Approved Hours is greater than zero (0:00)	Do not allow the action	Display the error message, "Denied must have Recipient Requested Hours greater than 0:00 and County Approved Hours as 0:00."

283	20905	CI-675618 - DSD EM CM 283 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Outcome is any of the Denied reasons AND the Recipient Requested Hours is zero (0:00) OR the County Approved Hours is greater than zero (0:00)	Do not allow the action	Display the error message, "Denied must have Recipient Requested Hours greater than 0:00 and County Approved Hours as 0:00."
284	20905	CI-675619 - DSD EM CM 284 IMPLEMENTED	Inactivate Flexible Hours	When the Yes link is selected on the Inactive Recipient Flexible Hours screen AND the Program Type associated with the Flexible Hours record is IHSS AND user is not an IHSS user	Do not allow the action	Display the error message, "Action not allowed for a WPCS user when the Program Type is IHSS."
285	20905	CI-675620 - DSD EM CM 285 IMPLEMENTED	Inactivate Flexible Hours	When the Yes link is selected on the Inactive Recipient Flexible Hours screen AND the Program Type associated with the Flexible Hours record is WPCS AND user is not an WPCS user	Do not allow the action	Display the error message, "Action not allowed for an IHSS user when the Program Type is WPCS."
286	20905	CI-675621 - DSD EM CM 286 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Request Outcome Date is before the Recipient Request Date	Do not allow the action	Display the error message, "The Request Outcome Date may not be before the Recipient Request Date."
287	20905	CI-675622 - DSD EM CM 287 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Request Outcome Date is before the Recipient Request Date	Do not allow the action	Display the error message, "The Request Outcome Date may not be before the Recipient Request Date."
288	20905	CI-675623 - DSD EM CM 288 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Flexible Hours End Date is not the last day of a calendar month	Do not allow the action	Display the error message, "Flexible Hours End Date must be the last day of a calendar month."
289	20905	CI-675624 - DSD EM CM 289 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND an Approved flexible hours segment already exists for the same MONTH YYYY	Do not allow the action	Display the error message, "An Approved Flexible Hours record already exists for this calendar month."
290	20905	CI-675625 - DSD EM CM 290 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND an Approved flexible hours segment already exists for the same MONTH YYYY	Do not allow the action	Display the error message, "An Approved Flexible Hours record already exists for this calendar month."
291	20905	CI-675626 - DSD EM CM 291 IMPLEMENTED	Case Termination Pending Flexible Hours	When the Save link is selected on the Case Termination screen AND a Pending status Flexible Hours segment exists AND the MONTH YEAR indicated on the Flexible Hours segment is for a month prior to or in the same month as the Termination Authorization Start Date	Do not allow the action	Display the error message, "Case Termination may not occur when a Pending Flexible Hours segment exists. Please Approve, Deny or Inactivate the Flexible Hours record before terminating this case."
292	20905	CI-675672 - DSD EM CM 292 IMPLEMENTED	Create Flexible Hours Modify Flexible Hours	When the Save link is selected on the Create Flexible Hours or the Modify Flexible Hours screens AND the current Frequency is One-Time AND a Flexible Hours record exists with an End Date which is after the MONTH YEAR indicated for the current record	Do not allow the action	Display the error message, "Action not allowed when a Flexible Hours record exists with an End Date MM /DD/YYYY which is after MONTH YYYY]. Please Cancel this action and End Date the previous record before continuing." MM/DD/YYYY will be the End Date on the previous record. Month YYYY = Month YYYY indicated on the current record.

293	12445	CI-706210 - DSD EM CM 293 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's IHSS Required Forms will be generated in English only."
294	12445	CI-706211 - DSD EM CM 294 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's IHSS Required Forms is not available in the indicated Recipient's Written Language."
295	12445	CI-706212 - DSD EM CM 295 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's IHSS Required Forms will be generated in English only."
296	12445	CI-706213 - DSD EM CM 296 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's IHSS Required Forms is not available in the indicated Recipient's Written Language."
297	12445	CI-706214 - DSD EM CM 297 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required Forms will be generated in English only."
298			Removed with CR 1191			
299	12445	CI-706216 - DSD EM CM 299 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required Forms will be generated in English only."
300			Removed with CR 1191			

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
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301	12455	CI-706218 - DSD EM CM 301 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Large Font has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Large Font version of the Recipient's IHSS Required Forms will be generated in English only."
302			Removed with CR 1191			
303	12455	CI-706220 - DSD EM CM 303 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Large Font has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Large Font version of the Recipient's IHSS Required Forms will be generated in English only."
304			Removed with CR 1191			
305	16688	CI-718095 - DSD EM CM 305 IMPLEMENTED	Create Unannounced Home Visit Details	When the Save link is selected on the Create Unannounced Home Visit screen And the Visit Focus field indicates "Provider" and a Provider is selected And that provider is not active for the Home Visit Date	Do not allow the action	Display the error message, 'Action not allowed: Provider selected for visit focus not eligible on date of Initial Unannounced Home Visit.'
306	16688	CI-718096 - DSD EM CM 306 IMPLEMENTED	Create Unannounced Home Visit Details	When the Save link is selected on the Create Unannounced Home Visit screen And the Home Visit Date Time is on or after a terminated segment start date Or that date is on or before a terminated segment end date Or that date is on or after an leave segment start date Or that date is on or before a leave segment end date	Do not allow the action	Display the error message, 'Action not allowed: Recipient case not eligible on date of Initial Unannounced Home Visit.'
307	16688	CI-718097 - DSD EM CM 307 IMPLEMENTED	Create Follow-up Letter Entry	When the Save link is selected on the Create Follow-up Letter Entry screen And the Letter Mailed Date is on or before the Initial Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be on or before the Initial Unannounced Home Visit Date.'
308	16688	CI-718098 - DSD EM CM 308 IMPLEMENTED	Create Follow-up Letter Entry	When the Save link is selected on the Create Follow-up Letter Entry screen And the Letter Mailed Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be a future date.'
309	16688	CI-718099 - DSD EM CM 309 IMPLEMENTED	Create Follow-up Letter Entry	When the Save link is selected on the Create Follow-up Letter Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
310	16688	CI-718100 - DSD EM CM 310 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Letter Mailed Date is on or before the Initial Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be on or before the Initial Unannounced Home Visit Date.'
311	16688	CI-718101 - DSD EM CM 311 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Letter Mailed Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be a future date.'
312	16688	CI-718102 - DSD EM CM 312 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'

313	16688	CI-718103 - DSD EM CM 313 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the date of entry is not equal current date And the Letter Mailed Date on the screen is not equal to the Letter Mailed Date on the database	Do not allow the action	Display the error message, 'Follow-up Letter Date may only be changed on the same day it was entered.'
314	16688	CI-718104 - DSD EM CM 314 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Follow-up Letter Date is equal to or greater than the Follow-up Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be on or after the Follow-up Phone Call Date.'
315	16688	CI-718105 - DSD EM CM 315 IMPLEMENTED	Deleted Follow-up Letter Entry	When the delete link is selected on the Modify Follow-up Letter Entry screen And a Phone Call record exist	Do not allow the action	Display the error message, 'Action not allowed, the Follow-up Phone Call record must be deleted prior to the deletion of the Follow-up Letter record.'
316	16688	CI-718106 - DSD EM CM 316 IMPLEMENTED	Create Phone Call Entry – Follow-up	When the Save link is selected on the Create Phone Call Entry screen And the Letter Mailed Date has not been previously entered	Do not allow the action	Display the error message, 'Follow-up Letter required before Follow-up Phone Call Date can be entered.'
317	16688	CI-718107 - DSD EM CM 317 IMPLEMENTED	Create Phone Call Entry – Follow-up	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is on or before the Follow-up Letter Mailed Date	Do not allow the action	Display the error message, 'Follow-up 'Follow-up Phone Call Date may not be the same as or before the Follow-up Letter Date.'
318	16688	CI-718108 - DSD EM CM 318 IMPLEMENTED	Create Phone Call Entry – Follow-up	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Phone Call Date may not be a future date.'
319	16688	CI-718109 - DSD EM CM 319 IMPLEMENTED	Create Phone Call Entry	When the Save link is selected on the Create Phone Call Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < () : ; , [@].)	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
320	16688	CI-718110 - DSD EM CM 320 IMPLEMENTED	Modify Phone Call Entry – Follow-up	When the Save link is selected on the Modify Phone Call Entry screen And the Letter Mailed Date is on or before the Initial Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Follow-up 'Follow-up Phone Call Date may not be the same as or before the Follow-up Letter Date.'

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
321	16688	CI-718111 - DSD EM CM 321 IMPLEMENTED	Modify Phone Call Entry – Follow-up	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Letter Mailed Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be a future date.'
322	16688	CI-718112 - DSD EM CM 322 IMPLEMENTED	Modify Phone Call Entry	When the Save link is selected on the Modify Phone Call Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < () : ; , [@].)	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
323	16688	CI-718113 - DSD EM CM 323 IMPLEMENTED	Modify Phone Call Entry – Follow-up	When the Save link is selected on the Modify Follow-up Phone Call Entry screen And the date of entry is not equal current date And the Follow-up Phone Call Date on the screen is not equal to the Follow-up Phone Call Date on the database	Do not allow the action	Display the error message, 'Follow-up Phone Call Date may only be changed on the same day it was entered.'
324	16688	CI-718114 - DSD EM CM 324 IMPLEMENTED	Modify Follow-up Phone Call Entry	When the Save link is selected on the Modify Follow-up Phone Call Entry screen And the Follow-up Phone Call Date is equal to or greater than the Follow-up UHV Date	Do not allow the action	Display the error message, 'Follow-up Phone Call date may not be on or after the Follow-up Unannounced Home Visit Date.'

325	16688	CI-718115 - DSD EM CM 325 IMPLEMENTED	Create Unannounced Home Visit – Follow-up	When the Save link is selected on the Create Unannounced Home Visit screen And the Phone Call Date has not been previously entered	Do not allow the action	Display the error message, 'Follow-up 'Follow-up Phone Call required before Follow-up Unannounced Home Visit Date Can be entered.'
326	16688	CI-718116 - DSD EM CM 326 IMPLEMENTED	Create Unannounced Home Visit – Follow-up	When the Save link is selected on the Create Unannounced Home Visit screen And the Follow-up Home Visit Date is on or before the Follow-up Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be the same as or before the Follow-up Phone Call Date.'
327	16688	CI-718117 - DSD EM CM 327 IMPLEMENTED	Create Unannounced Home Visit – Follow-up	When the Save link is selected on the Create Unannounced Home Visit screen And the Follow-up Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be a future date.'
328	16688	CI-718118 - DSD EM CM 328 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < () : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
329	16688	CI-718119 - DSD EM CM 329 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the Follow-up Home Visit Date is on or before the Follow-up Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be the same as or before the Follow-up Phone Call Date.'
330	16688	CI-718120 - DSD EM CM 330 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the Follow-up Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be a future date.'
331	16688	CI-718121 - DSD EM CM 331 IMPLEMENTED	Modify Unannounced Home Visit	When the Save link is selected on the Modify Unannounced Home Visit screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < () : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
332	16688	CI-718122 - DSD EM CM 332 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the date of entry is not equal current date And the Follow-up Home Visit Date on the screen is not equal to the Follow-up Home Visit Date on the database	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may only be changed on the same day it was entered.'
333	16688	CI-718123 - DSD EM CM 333 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the Follow-up Home Visit Date is equal to or greater than the Final Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Phone Call date may not be on or after the Follow-up Unannounced Home Visit Date.'
334	16688	CI-718124 - DSD EM CM 334 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the user is attempting to change the Outcome From an unsuccessful Outcome of 'Entry Denied' or 'Uncooperative' or 'No Contact Made' or 'Not Available' To a successful Outcome of 'Completed' or 'Follow-up Required' or 'Fraud Referral' or Reassessment Required And a Final Phone Call record exist	Do not allow the action	Display the error message, 'Final Phone call record must be inactivated before UHV outcome can be changed from an unsuccessful to successful.'
335	16688	CI-718125 - DSD EM CM 335 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the user is attempting to change the Outcome From a successful Outcome of 'Completed' or 'Follow-up Required' or 'Fraud Referral' or Reassessment Required To an unsuccessful Outcome of 'Entry Denied' or 'Uncooperative' or 'No Contact Made' or 'Not Available' And a Final UHV record exist	Do not allow the action	Display the error message, 'Follow-up UHV Outcome cannot be changed when Final UHV record exists'
336	16688	CI-718126 - DSD EM CM 336 IMPLEMENTED	Create Phone Call Entry – Final	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is on or before the Follow-up Home Visit Date	Do not allow the action	Display the error message, 'Final Phone Call date may not be on or after the Follow Unannounced Home Visit Date.'

337	16688	CI-718127 - DSD EM CM 337 IMPLEMENTED	Create Phone Call Entry – Final	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is greater than the current date	Do not allow the action	Display the error message, 'Final Phone Call Date may not be a future date.'
338	16688	CI-718128 - DSD EM CM 338 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the Final Phone Call Date is on or before the Follow-up Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Final Phone Call Date may not be the same as or before the Follow-up Unannounced Home Visit Date.'
339	16688	CI-718129 - DSD EM CM 339 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the Final Phone Call Date is greater than the current date	Do not allow the action	Display the error message, 'Final Phone Call Date may not be a future date.'
340	16688	CI-718130 - DSD EM CM 340 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the date of entry is not equal current date And the Final Phone Call Date on the screen is not equal to the Final Phone Call Date on the database	Do not allow the action	Display the error message, 'Final Phone Call Date may only be changed on the same day it was entered.'

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
341	16688	CI-718131 - DSD EM CM 341 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the Final Phone Call Date is equal to or greater than the Final UHV Date	Do not allow the action	Display the error message, 'Final Phone call date may not be on or after the Final Unannounced Home Visit Date.'
342	16688	CI-718132 - DSD EM CM 342 IMPLEMENTED	Create Unannounced Home Visit – Final	When the Save link is selected on the Create Unannounced Home Visit screen And the Phone Call Date has not been previously entered	Do not allow the action	Display the error message, 'Final Phone Call required before Final Unannounced Home Visit Date Can be entered.'
343	16688	CI-718133 - DSD EM CM 343 IMPLEMENTED	Create Unannounced Home Visit – Final	When the Save link is selected on the Create Unannounced Home Visit screen And the Final Home Visit Date is on or before the Final Phone Call Date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be the same as or before the Final Phone Call Date.'
344	16688	CI-718134 - DSD EM CM 344 IMPLEMENTED	Create Unannounced Home Visit – Final	When the Save link is selected on the Create Unannounced Home Visit screen And the Final Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be a future date.'
345	16688	CI-718135 - DSD EM CM 345 IMPLEMENTED	Modify Unannounced Home Visit – Final	When the Save link is selected on the Modify Unannounced Home Visit screen And the Final Home Visit Date is on or before the Final Phone Call Date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be the same as or before the Final Phone Call Date.'
346	16688	CI-718136 - DSD EM CM 346 IMPLEMENTED	Modify Unannounced Home Visit – Final	When the Save link is selected on the Modify Unannounced Home Visit screen And the Final Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be a future date.'
347	16688	CI-718137 - DSD EM CM 347 IMPLEMENTED	Modify Unannounced Home Visit – Final	When the Save link is selected on the Modify Unannounced Home Visit screen And the date of entry is not equal current date And the Home Visit Date on the screen is not equal to the Home Visit Date on the database	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may only be changed on the same day it was entered.'
348	16688	CI-719709 - DSD EM CM 348 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected And the Termination Reason "Non-compliance - UHV" is indicated And the most recent UHV record is not a Final UHV record in unsuccessful status.	Do not allow the action	Display the error message, 'Action not allowed: Final Unannounced Home Visit record not in an 'Unsuccessful' Status or does not exist.'

349		CI-753342 - DSD EM CM 349 CANCELLED	Cancelled by CR115			
350	16878	CI-775216 - DSD EM CM 350 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Termination Reason is "Health Care Certification – No Need" AND the Health Care Certification screen has a Health Care Certification Type indication other than "No Need"	Do not allow the action	Display the error message, "Invalid Termination Reason when "Health Care Certification Type is [Health Care Certification Type]."
351	16878	CI-775217 - DSD EM CM 351 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Termination Reason is "Health Care Certification – Not Received" AND the current date is before either the Health Care Certification Due Date or, if indicated, Good Cause Extension Due Date	Do not allow the action	Display the error message, "Case may not be terminated for "Health Care Certification – Not Received, before the Health Care Certification Due Date."
352	20734	CI-775278 - DSD EM CM 352 IMPLEMENTED	Create Recipient Workweek Agreement OR Modify Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement AND the Total Hours field is 00:00 AND the Back-Up Provider is not selected	Do not allow the action.	Display the error message "When Total Hours is 00:00, Back-Up Provider must be selected. If this provider is not a back-up provider, please update the Time Entries as needed."
353	20734	CI-775279 - DSD EM CM 353 IMPLEMENTED	Create Recipient Workweek Agreement OR Modify Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement AND the Total Hours field is other 00:00 AND the Back-Up Provider is selected	Do not allow the action.	Display the error message "When Back-Up Provider is indicated the Total Hours must be 00:00. If this provider is not a back-up provider, please update the Time Entries as needed."
354	20734	CI-775280 - DSD EM CM 354 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement AND the provider being added as the Back-Up" has an "Active" status Provider Hours segment for the period as of the Recipient Workweek Agreement Begin Date AND the Back-Up Provider is selected	Do not allow the action.	Display the error message "Active Status Provider may not be indicated as Back-up."
355	20734	CI-775281 - DSD EM CM 355 IMPLEMENTED	Create Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement pop-up AND the recipient case status is Terminated on or after the Recipient Workweek Agreement Begin Date	Do not allow the action	Display the error message, "Recipient Workweek Agreement not allowed for a period when case status is Terminated."
356	16025	CI-818676 - DSD EM CM 356 IMPLEMENTED	Rescind Case	When an attempt is made to save a Rescind Case screen AND the Person Home Reported Date of Death is not blank field is not blank AND the Person Home Death Outcome is Pending	Do not allow the action	The data in this screen will not be saved and the following error messages displays, "Action not allowed when Person Home indicates Reported Date of Death and the Death Outcome is Pending."
357	16025	CI-818677 - DSD EM CM 357 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen AND the Person Home Reported Date of Death is not blank field is not blank AND the Person Home Death Outcome is Pending	Do not allow the action	Display the Error Message "Action not allowed when Person Home indicates Reported Date of Death and the Death Outcome is Pending."

358	21133	CI-819042 - DSD EM CM 358 <small>IMPLEMENTED</small>	Modify Timesheet Communication Preferences	The Modify Timesheet Communication Preferences Pop-up screen is saved AND The recipient is a registered user of TTS or ESP or both AND The Communication Preferences selection is left blank.	Do not allow the action	Display the error message, "Communication Preferences' must be entered."
359	21133	CI-819043 - DSD EM CM 359 <small>IMPLEMENTED</small>	Modify Timesheet Communication Preferences	The Modify Timesheet Communication Preferences Pop-up screen is saved AND The recipient is not a registered user of ESP AND Email is the selected Communication Preference.	Do not allow the action	Display the error message, "Recipient must be an ESP user to select this preference."
360	21133	CI-819044 - DSD EM CM 360 <small>IMPLEMENTED</small>	Modify Timesheet Communication Preferences	The Modify Timesheet Communication Preferences Pop-up screen is saved AND The recipient is not a registered user of TTS AND Telephone is the selected Communication Preference.	Do not allow the action	Display the error message, "Recipient must be a TTS user to select this preference."

No	R e q ID	CI	Screen Name or User Action	Condition	Action	Error Message
3 61	2 1 1 34	CI-819049 - DSD EM CM 361 <small>IMPLEMENTED</small>	Reset Recipient TTS Passcode Pop-up with a non-4-digit number	The Reset Recipient TTS Passcode Pop-up screen is saved AND Either the New Passcode or Confirm Passcode field does not contain a 4 digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"
3 62	2 1 1 34	CI-819050 - DSD EM CM 362 <small>IMPLEMENTED</small>	Reset Recipient TTS Passcode Pop-up mismatched fields	The Reset Recipient TTS Passcode Pop-up screen is saved AND Both the New Passcode and Confirm Passcode fields contain a 4 digit number, but the 4 digit numbers do not match across both fields.	Do not allow the action	Display the error message, "Fields must match"
3 63	2 1 1 34	CI-819064 - DSD EM CM 363 <small>IMPLEMENTED</small>	Reset Provider TTS Passcode Pop-up with a non-4-digit number	The Reset Provider TTS Passcode Pop-up screen is saved AND Either the New Passcode or Confirm Passcode fields do not contain a 4-digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"
3 64	2 1 1 34	CI-819065 - DSD EM CM 364 <small>IMPLEMENTED</small>	Reset Provider TTS Passcode Pop-up mismatched fields	The Reset Provider TTS Passcode Pop-up screen is saved AND Both the New Passcode and Confirm Passcode fields contain a 4-digit number, but the 4-digit numbers do not match.	Do not allow the action	Display the error message, "Fields must match"

3 65	2 1 1 34	CI-822185 - DSD EM CM 365 IMPLEMENTED	Register Recipient for TTS Pop-up - Inputting a non-4-digit number	The Register Recipient for TTS Pop-up screen is saved AND Either the Passcode or Confirm Passcode field does not contain a 4 digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"
3 66	2 1 1 34	CI-822186 - DSD EM CM 366 IMPLEMENTED	Register Recipient for TTS Pop-up - Mismatched fields	The Register Recipient for TTS Pop-up screen is saved AND Both the Passcode and Confirm Passcode fields contain a 4 digit number, but the 4 digit numbers do not match across both fields.	Do not allow the action	Display the error message, "Fields must match"
3 67	2 1 1 34	CI-819069 - DSD EM CM 367 IMPLEMENTED	Register Recipient for TTS Pop-up - No Recorded Telephone Number	The Register Recipient for TTS Pop-up screen is saved AND The Recipient does not have a primary telephone number listed in CMIPS	Do not allow the action	Display the error message, "Recipient must have a primary telephone number in CMIPS to use the TTS."
3 68	2 1 1 34	CI-822286 - DSD EM CM 368 IMPLEMENTED	Register Provider for TTS Pop-up - Inputting a non-4-digit number	The Register Provider for TTS Pop-up screen is saved AND Either the Passcode or Confirm Passcode field does not contain a 4 digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"
3 69	2 1 1 34	CI-822287 - DSD EM CM 369 IMPLEMENTED	Register Provider for TTS Pop-up - Mismatched fields	The Register Provider for TTS Pop-up screen is saved AND Both the Passcode and Confirm Passcode fields contain a 4 digit number, but the 4 digit numbers do not match across both fields.	Do not allow the action	Display the error message, "Fields must match"
3 70	2 1 0 05	CI-822339 - DSD EM CM 370 IMPLEMENTED	Modify Timesheet Accommodations pop-up - Advance Pay - Large Font	When the Save link is selected on the Modify Timesheet Accommodations pop-up AND The Accommodation of Large Font Timesheet has been selected AND The Recipient is designated to receive Advance Payments	Do not allow the action	Display the message: "The Timesheet Accommodation of Large Font Timesheet is not allowed for the Recipients designated to receive Advance Payments."
3 71		CI-822340 - DSD EM CM 371 CANCELLED	Cancelled by ASR Sprint 25 Team 1&2			
3 72	2 1 1 53	CI-822428 - DSD EM CM 372 IMPLEMENTED	Modify Timesheet Accommodation Pop-up	When a county user selects save button on the Modify Timesheet Accommodations pop-up AND The value selected is "Press or Say" AND The Recipient's Spoken Language is not English or Spanish	Allow the action	Display the informational message, "Recipient's spoken language is not supported by Press or Say TTS. Calls to this recipient will be made in English."
3 73		Reserved for CR 223 (CR is cancelled)				

3 74	CI-822496 - DSD EM CM 374 IMPLEMENTED	Upload Case Attachments	User selects a file to upload AND Selects a form from the dropdown, where form already exists for that case (with the exception of SOC 426A, SOC 839, SOC 321, SOC 839A, SOC 838, and SOC 450) AND Selects Save Action	Do not allow the action	The file is not uploaded and the following message displays: "This form already exists on Case Attachments Screen; Uploading multiple copies of this form is not allowed. To upload the form, existing form must be archived from the Case Attachments Screen."
3 75 2 1 1 75	CI-822497 - DSD EM CM 375 IMPLEMENTED	Upload Case Attachments	Save Action is selected to upload an attachment and the attachment's size exceeds 5 MB.	Do not allow the action	The attachment is not uploaded and the following message displays: "File exceeds size limitation of 5 MB."
3 76 2 1 1 75	CI-822498 - DSD EM CM 376 IMPLEMENTED	Upload Case Attachments	Save Action is selected to upload an attachment and the attachment's file type is not one of the following: PDF, DOC, DOCX, TIF, TIFF, GIF, BMP, PNG, JPG, and JPEG.	Do not allow the action	The attachment is not uploaded and the following message displays: "File type is not supported. Supported file types are PDF, DOC, DOCX, TIF, TIFF, GIF, BMP, PNG, JPG, and JPEG."

No	R e q ID	CI	Screen Name or User Action	Condition	Action	Error Message
3 81		Reserved for CR-170 - SSR				
3 82		Reserved for CR-170 - SSR				
3 83		Reserved for CR-170 - SSR				
3 84		Reserved for CR-170 - SSR				
3 85		Reserved for CR-170 - SSR				
3 86		Reserved for CR-223 - SSR				
3 87 2 1 2 28 2 1 2 31	CI-822780 - DSD EM CM 387 IMPLEMENTED	Confirm EVV Exception for Recipient - Pending EVV Timesheets	When a county user selects yes button on the Confirm EVV Exception for Recipient Pop-up AND There are IHSS/WPCS timesheets in Pending Recipient Electronic Review status	Allow the action	Display the informational message, "One or more timesheets have been sent to your CMIPS printer. Please mail the printed timesheet(s) to the recipient for review."	
3 88 2 1 2 28 2 1 2 12	CI-822782 - DSD EM CM 388 IMPLEMENTED	EVV Exception Error Message	When a county user selects the "Yes" button on the Confirm EVV Exception for Recipient Pop-up AND The Recipient is registered for either the ESP or TTS AND This confirmation message is not already present	Do not allow the action	Display the confirmation message, "This recipient is currently registered for an electronic method. Are you sure you want to approve an EVV Exception." The user must select either "Yes" a second time to confirm the action and allow the EVV Exception to be entered or "No" to cancel the action.	

3 89	2 1 3 20	CI-823138 - DSD EM CM 389 IMPLEMENTED	Modify Notification Communication Preference - No phone number on file	When a county user selects 'Text Messages' or 'Both Text Messages and Email' AND Selects the Save button AND There is no cell phone number on file	Do not allow the action	Display the warning message, "A cell phone number must be set up for the Recipient to select this preference."
3 90	2 1 3 20	CI-823139 - DSD EM CM 390 IMPLEMENTED	Modify Notification Communication Preference - Cell phone number listed but not verified	When a county user selects 'Text Messages' or 'Both Text Messages and Email' AND Selects the Save button AND The cell phone number has not been verified	Do not allow the action	Display the warning message, "The cell phone number must be verified for the Recipient to select this preference."
3 91	2 1 3 20	CI-823140 - DSD EM CM 391 IMPLEMENTED	Modify Notification Communication Preference - Recipient is not registered with ESP	When a county user selects 'Email', 'Text Messages' or 'Both Text Messages and Email' AND Selects the Save button AND Recipient is not registered with ESP	Do not allow the action	Display the warning message "Cannot set up notification preference because the Recipient is not registered with ESP."
3 92		CI-823141 - DSD EM CM 392 CANCELLED	Cancelled by SCF-91			
3 93	2 1 3 20	CI-823142 - DSD EM CM 393 IMPLEMENTED	Verify Cell Phone Number - Invalid Verification Code	When a county user enters an invalid Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message "Invalid verification code, please enter a valid verification code."
3 94	2 1 3 20	CI-823143 - DSD EM CM 394 IMPLEMENTED	Verify Cell Phone Number - Expired Verification Code	When a county user enters an expired Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message "Verification code expired, please select "Resend Code" to receive a new one."
3 95	2 1 3 20	CI-823144 - DSD EM CM 395 IMPLEMENTED	Verify Cell Phone Number - Blocked Verification Code	When a county user enters a blocked Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message "The verification code is blocked since you've entered an incorrect verification code more than 5 times. Please select "Resend Code" to receive a new one."
3 96		Reserved for ASR Sprint 24 Team CM & AS				
3 97	2 1 1 75	CI-823386 - DSD EM CM 397 IMPLEMENTED	Upload Case Attachments - S3 is down	When the user selects a file to upload AND S3 is down AND Selects Save Action	Do not allow the action	Display the warning message "There was an issue uploading the file, please try again later."

3 98	2 1 1 75	CI-823644 - DSD EM CM 398 IMPLEMENTED	Restore Attachment associated to Case	User selects the 'Restore' action AND There is already a document of that type in 'Uploaded' status AND Multiple copies of the document is NOT allowed	Do not allow the action	Display the error message: "This form already exists on Provider Attachments Screen; multiple current copies of this form is not allowed. To restore this form, the existing form must be archived from the Provider Attachments Screen."
3 99	1 2 1 63 1 2 1 83	CI-823734 - DSD EM CM 399 IMPLEMENTED	Create Inter-County Transfer, Modify Inter-County Transfer	When the user clicks the Save button on the Create Inter-County Transfer or Modify Inter-County Transfer screen AND The phone number entry is 000 000000 or 999 999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
4 00	2 1 3 78	CI-823755 - DSD EM CM 400 IMPLEMENTED	Send Electronic Form to CSP Pop-Up	When the user selects the Send button on the Send Electronic Form to CSP Pop-Up screen AND The assigned worker does not have 2FA credentials	Do not allow the action	Display the error message, "Assigned Worker has not setup their CSP Two-Step Authentication Information."

No	R e q ID	CI	Screen Name or User Action	Condition	Action	Error Message
4 01	2 1 3 78	CI-823756 - DSD EM CM 401 IMPLEMENTED	Send Electronic Form to CSP - Assigned Worker blank	When the user selects the Send button on the Send Electronic Form to CSP Pop-Up screen AND The Assigned Worker field is blank	Do not allow the action	Display the error message, "Assigned Worker is required when CMIPS Services Portal is selected."
4 02	2 1 3 78	CI-823807 - DSD EM CM 402 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The date entered in the From Date field not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'From Date' is not valid. A date must be in the format 'MM/DD/YYYY', you have entered '<input>'."
4 03	2 1 3 78	CI-823808 - DSD EM CM 403 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The date entered in the To Date field not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'To Date' is not valid. A date must be in the format 'MM/DD/YYYY', you have entered '<input>'."
4 04	2 1 3 78	CI-823809 - DSD EM CM 404 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The entry in the To Date field is earlier than the entry in the From Date field	Do not allow the action	Display the error message, "To Date must be on or after the From Date."
4 05	2 1 3 78	CI-823810 - DSD EM CM 405 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The entries in the From Date and To Date fields are greater than one year apart.	Do not allow the action	Display the error message, "Search is limited to one year."

4	06	2 0 7 65 2 0 7 96 2 1 1 53	CI-823934 - DSD EM CM 406 IMPLEMENTED	Modify Recipient Timesheet Accommodations	The Modify Recipient Timesheet Accommodations Pop-up screen is saved And The selected Timesheet Accommodation preference is 'Press or Say' And The Recipient is not registered for TTS	Do not allow the action	Display the error message, "Recipient must be registered for TTS to select Press or Say."
4	07	2 1 3 20 2 1 3 25	CI-823973 - DSD EM CM 407 IMPLEMENTED	Verify Cell Phone Number - Invalid Phone Number	When a county user enters a Verification Code and the Phone Number is invalid AND Selects the Verify button	Do not allow the action	Display the warning message "Not a valid phone number. Please enter valid phone number."
4	08	2 1 3 78	CI-823981 - DSD EM CM 408 IMPLEMENTED	Send Electronic Form to ESP - Recipient not registered with ESP	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The recipient is not registered with ESP	Do not allow the action	Display the error message, "Recipient is not registered with ESP."
4	09	2 1 3 78	CI-823982 - DSD EM CM 409 IMPLEMENTED	Send Electronic Form to ESP - Action Date format	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The Action Date entered is not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'Action Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<user entry>'."
4	10	2 1 3 78	CI-823983 - DSD EM CM 410 IMPLEMENTED	Send Electronic Form to ESP - Action Date blank	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The Action Date field is blank	Do not allow the action	Display the error message, "Action Date" must be entered."
4	11	2 1 3 78	CI-823984 - DSD EM CM 411 IMPLEMENTED	Send Electronic Form to ESP - Action Date is a past date	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The Action Date entered is a past date	Do not allow the action	Display the error message, "Action Date field cannot be a past date."
4	12	2 1 3 78	CI-824204 - DSD EM CM 412 IMPLEMENTED	Create Form Pop-Up - Non ESP Form	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND One Non-ESP available form is selected	Do not allow the action	Display the error message, "<FORM long name> can't be sent to ESP"
4	13	2 1 3 78	CI-824205 - DSD EM CM 413 IMPLEMENTED	Create Form Pop-Up - More than one Form	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND More than one form is selected	Do not allow the action	Display the error message, "Only one form can be sent to ESP at a time"
4	14	2 1 3 78	CI-824206 - DSD EM CM 414 IMPLEMENTED	Create Form Pop-Up - Not Registered with ESP	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The Recipient is not registered with ESP	Do not allow the action	Display the error message, "Recipient not registered with ESP"

4	15	2 1 3 78	CI-824207 - DSD EM CM 415 IMPLEMENTED	Create Form Pop-Up - Incorrect Date Format	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The entered date in the Electronic Form Due Date field is not in the format MM/DD/YYYY	Do not allow the action	Display the error message, "The field Electronic Form Due Date is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<user entry>'."
4	16	2 1 3 78	CI-824208 - DSD EM CM 416 IMPLEMENTED	Create Form Pop-Up - Due Date is Blank	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The Electronic Form Due Date field is blank	Do not allow the action	Display the error message, "Electronic Form Due Date must be entered."
4	17	2 1 3 78	CI-824209 - DSD EM CM 417 IMPLEMENTED	Create Form Pop-Up - Due Date Past Due	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The Electronic Form Due Date field is a past date	Do not allow the action	Display the error message, "Electronic Form Due Date field cannot be a past date."
4	18	2 1 3 78	CI-824210 - DSD EM CM 418 IMPLEMENTED	Create Form Pop-Up - Due Date Only Allowed When Sending to ESP	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is not selected AND The Electronic Form Due Date field has a future date	Do not allow the action	Display the error message, "Electronic Form Due Date only allowed when sending to ESP"
4	19	2 1 3 78	CI-824352 - DSD EM CM 419 IMPLEMENTED	Create Form Pop-Up - SOC 873 & SOC 874/SOC 873L & SOC 874L	When the Save button is selected on the Create Form Pop-Up AND The "Send Electronic Copy to ESP" print option is selected AND The user selected either SOC 873 or SOC 873/874 AND The user entered an Electronic Form Due Date	Do not allow the action	Display the error message, "Electronic Form Due Date may not be entered for the SOC 873/SOC 874. The Due Date for the SOC 873 & 874 will be calculated automatically ."

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (1-20)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
1	12089	CI-111966 - DSD EM CM 001 IMPLEMENTED	Create WPCS Hours	When an attempt is made to save a Create WPCS Hours screen and WPCS Hours field is blank (or) zero (or) any special characters.	Do not allow the action	Display the error message "The WPCS Hours field must have a valid number of hours"
2		This Error Message was removed with CR 871				
3	12625	CI-111929 - DSD EM CM 003 IMPLEMENTED	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen AND The Start Date is not the first day of a calendar month and the End Date is not the end date of the same month OR The Start Date is the first day of a calendar month and the End Date is not mid-month of the same month	Do not allow the action	Display the error message, "A prorated WPCS hours segment must begin on the first day or end on the last day of the same service month."
4	12625	CI-111996 - DSD EM CM 004 IMPLEMENTED	Create WPCS Hours	When an attempt is made to save a Create WPCS Hours screen AND A previous WPCS Hours record exists AND Any date between the Start Date or End Date on the Create WPCS Hours screen overlaps with a date of the previous segment.	Do not allow the action	Display the error message "The WPCS hours segment overlaps with an existing segment."
5	12623 12625 12632 16666 16971	CI-111944 - DSD EM CM 005 IMPLEMENTED	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen and the Medi-Cal FFP indication for the Eligibility Month is "No" and the Start Date is prior to 05/01/2022.	Do not allow the action	Display the error message, 'WPCS Hours are not allowed when Medi-Cal FFP is 'No' for service months prior to 05 /01/2022'.
6		Removed CR606B				
7	12625	CI-111985 - DSD EM CM 007 IMPLEMENTED	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen and WPCS Hours field is blank (or) zero (or) any special characters.	Do not allow the action	Display the error message "The WPCS Hours field must have a valid number of hours"
8	12625	CI-111946 - DSD EM CM 008 IMPLEMENTED	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen with End Date that is before the Start Date.	Do not allow the action	Display the error message "End Date must be after Start Date"
9		This Error Message was removed with CR 871				
10	12625	CI-111994 - DSD EM CM 010 IMPLEMENTED	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen AND The Start Date is not the first day of a calendar month and the End Date is not the end date of the same month OR The Start Date is the first day of a calendar month and the End Date is not mid-month of the same month	Do not allow the action	Display the error message, "A prorated WPCS hours segment must begin on the first day or end on the last day of the same service month."
11	12625	CI-111972 - DSD EM CM 011 IMPLEMENTED	Modify WPCS Hours	When an attempt is made to save a Modify WPCS Hours screen and the WPCS Hours have been decreased to a number of hours less than the WPCS hours already paid for the associated service month(s).	Do not allow the action	Display the error message "WPCS Hours have been paid for the indicated service month (s). Hours may not be decreased below the WPCS hours already paid."

12	12093	CI-111980 - DSD EM CM 012 IMPLEMENTED	Modify County Contractor	When an attempt is made to save a Modify County Contractor screen and the Warrant # field is filled and Paid Date is blank.	Do not allow the action	Display the error message "Paid Date is required when a warrant number is entered"
13	12093	CI-111951 - DSD EM CM 013 IMPLEMENTED	Modify County Contractor	When an attempt is made to save a Modify County Contractor screen and Paid Date field is filled and Warrant # is blank.	Do not allow the action	Display the error message "Warrant number is required when the Paid Date is entered"
14	12093	CI-111933 - DSD EM CM 014 IMPLEMENTED	Modify County Contractor	When an attempt is made to save a Modify County Contractor screen and the Paid Date is before the Processed Date.	Do not allow the action	Display the error message "Paid Date must be later than Processed Date"
15	16818	CI-111942 - DSD EM CM 015 IMPLEMENTED	View County Contractor	When the Contractor Expenditure Report link is selected from the View County Contractor screen and the Warrant # and Paid Date fields are blank.	Do not allow the action	Display the error message "The warrant number and the Paid Date are both required to produce the Contract Expenditure Report"
16	16267	CI-111925 - DSD EM CM 016 IMPLEMENTED	Create Homemaker Timesheet	When a County Homemaker attempts to save a Create Homemaker Timesheet screen and a record already exists for the Homemaker for the indicated month and year (service month).	Do not allow the action	Display the error message "Service Month already exists for the Homemaker"
17	12498	CI-111938 - DSD EM CM 017 IMPLEMENTED	View Homemaker Timesheets	When an attempt is made to save a Recipient record to the View Homemaker Timesheets screen and the indicated hours plus any Homemaker Hours already approved for the service month exceed the Homemaker Hours assigned to the Recipient case for the service month.	Do not allow the action	Display the error message "Timesheet hours exceed Homemaker Assigned Hours for the Service Month"
18	12498	CI-111943 - DSD EM CM 018 IMPLEMENTED	Modify Homemaker Timesheet	When an attempt is made to save a Recipient record to the Modify Homemaker Timesheet screen and the indicated hours plus any Homemaker Hours already approved for the service month exceed the Homemaker Hours assigned to the Recipient case for the service month.	Do not allow the action	Display the error message "Timesheet hours exceed Homemaker Assigned Hours for the Service Month"
19	12121 16267	CI-111993 - DSD EM CM 019 IMPLEMENTED	Homemaker Timesheet Submit for Approval	When an attempt is made to Submit for Approval Timesheets and there are no records in Not Submitted status.	Do not allow the action	Display the error message "All timesheets for this Homemaker have been submitted"
20	16266	CI-111924 - DSD EM CM 020 IMPLEMENTED	Approve Homemaker Timesheet	When the Approve link is selected from the View Homemaker Timesheets screen and the hours indicated for the service month for the Recipient, plus any Homemaker Hours already approved for that service month exceed the number of hours assigned to the Homemaker Mode of Service for that service month.	Do not allow the action	Display the error message "Timesheet hours exceed Homemaker Assigned Hours for the Service Month"

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (21-40)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
21	12461 12463 16893	↳ CI-111921 - DSD EM CM 021 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and the indicated Workplace Hours are greater than Recipient case Total Auth to Purchase After Reduced Hours.	Do not allow the action	Display the error message "Workplace Hours may not exceed case Total Auth to Purchase After Reduced Hours"
22	12461	↳ CI-111970 - DSD EM CM 022 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and the Start Date is not a current or a future month.	Do not allow the action	Display the error message "Start Date must be in the current or a future month"
23	12461	↳ CI-111947 - DSD EM CM 023 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and the End Date is before the Start Date.	Do not allow the action	Display the error message "End Date must be after the Start Date"
24	12461	↳ CI-111928 - DSD EM CM 024 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and a Workplace Hours screen exists without an End Date.	Do not allow the action	Display the error message "Previous Workplace Hours must be End Dated before a new Workplace Hours record may be created"
25	12461 12463	↳ CI-111941 - DSD EM CM 025 IMPLEMENTED	Create Workplace Hours	When an attempt is made to save a Create Workplace Hours screen and there are no IHSS Total Auth to Purchase After Reduced Hours for the Start Date and the service month.	Do not allow the action	Display the error message "The Recipient case must have Total Auth to Purchase After Reduced Hours for the Service Month before a Workplace Hours record can be created"
26	12461	↳ CI-111964 - DSD EM CM 026 IMPLEMENTED	Modify Workplace Hours	When an attempt is made to save a Modify Workplace Hours screen and the End Date is before the Start Date.	Do not allow the action	Display the error message "End Date must be after the Start Date"
27	16185	↳ CI-111982 - DSD EM CM 027 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Scheduled Hearing Date is before the Request Date.	Do not allow the action	Display error message "Scheduled Hearing Date cannot be before the Request Date"
28	16185	↳ CI-111956 - DSD EM CM 028 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Reschedule Reason is indicated, but no Scheduled Hearing Date is indicated.	Do not allow the action	Display the error message "Scheduled Hearing Date is required when the Reschedule Reason is indicated"
29	16185	↳ CI-111940 - DSD EM CM 029 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Scheduled Hearing Date is before the Request Date.	Do not allow the action	Display the error message "Scheduled Hearing Date cannot be before the Request Date"
30	16185	↳ CI-111955 - DSD EM CM 030 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Rescheduled Reason is indicated, but no Scheduled Hearing Date is indicated.	Do not allow the action	Display the error message "Scheduled Hearing Date is required when a Reschedule Reason is indicated"
31	16185	↳ CI-111975 - DSD EM CM 031 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and Scheduled Hearing date has changed and the Rescheduled Reason is blank.	Do not allow the action	Display the error message "Reschedule Reason required when the Scheduled Hearing Date is updated"
32	16185 16187	↳ CI-111991 - DSD EM CM 032 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the outcome is other than Conditional Withdrawal, Erroneous Entry, or Complete Withdrawal and the Scheduled Hearing Date is blank.	Do not allow the action.	Display the error message "A Scheduled Hearing Date is required for this Outcome."
33	16188	↳ CI-111984 - DSD EM CM 033 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Outcome Date is before the Request Date.	Do not allow the action	Display the error message "Outcome Date cannot be before the Request Date"

35	16185 16188	CI-111922 - DSD EM CM 035 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Compliance Form Sent Date is before the Outcome Date.	Do not allow the action	Display the error message "Compliance Form Sent Date cannot be before the Outcome Date"
36	16188	CI-111995 - DSD EM CM 036 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and an Outcome other than Pending or Erroneous Entry is indicated and the Outcome Date is blank.	Do not allow the action.	Display the error message "Outcome Date is required when the outcome is indicated."
37	16188	CI-111920 - DSD EM CM 037 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Modify State Hearing screen and the Outcome Date is indicated and the Outcome is blank.	Do not allow the action	Display the error message "Outcome is required when the Outcome Date is indicated"
38	12179	CI-111981 - DSD EM CM 038 IMPLEMENTED	Create Inter-County Transfer	When an attempt is made to save a Create Inter-County Transfer screen and a State Hearing exists with a status other than "Resolved."	Do not allow the action	Display the error message "Inter-County Transfer is not allowed on a case with an active State Hearing"
39	12173	CI-111957 - DSD EM CM 039 IMPLEMENTED	Create Inter-County Transfer	When an attempt is made to save a Create Inter-County Transfer screen and the Recipient case status is other than Eligible or Presumptive Eligible.	Do not allow the action	Display the error message "Inter-County Transfer is not allowed on a case without current IHSS eligibility"
40	12160	CI-111950 - DSD EM CM 040 IMPLEMENTED	Modify Inter-County Transfer	When an attempt is made to save the Modify Inter-County Transfer screen and a user in a county other than the Receiving County selects the Assign Worker.	Do not allow the action	Display the error message, "Only a user in the receiving County may assign a worker"

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (41-60)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
41	12037	CI-111945 - DSD EM CM 041 IMPLEMENTED	Program Evidence (Service Eligibility)	When an attempt is made to save a Program Evidence screen and the current case status is Leave with a reason of "Undervalue disposal of resources" and Authorization Start Date before the Resource Suspension End Date.	Do not allow the action	Displays the error message, "Authorization Start Date must be on or after Leave Status Resource Suspension End Date [MMDDYYYY]"
43	12318	CI-111916 - DSD EM CM 043 IMPLEMENTED	Leave Case	When an attempt is made to save a Leave Case screen and the Reason is "Undervalue disposal of resources" and the Resource Suspension End Date is blank.	Do not allow the action	Displays the error message, "Resource Suspension End Date is required for the indicated Reason"
45	12264	CI-111931 - DSD EM CM 045 IMPLEMENTED	Rescind Case	When an attempt is made to save a Rescind Case screen and the user taking the action is not the Case Owner.	Do not allow the action	Display the error message, "Only the Case Owner may rescind a case"
48	16548	CI-111992 - DSD EM CM 048 IMPLEMENTED	Create Form	When an attempt is made to save a Create Form screen and there is text in the Paramedical Form Text box and the SOC 321 – Paramedical Services form is not selected.	Do not allow the action	Display the error message, "Paramedical Form Text is only allowed when the Paramedical Services Form is selected"
49	12524 16885 16897	CI-111939 - DSD EM CM 049 IMPLEMENTED	Modify and Inactivate Form	When an attempt is made to save a Modify and Inactivate Form screen and the selected Form is a Provider Notification (SOC 858) in Pending status and Inactivate/Not Mailed is indicated.	Do not allow the action	Display the error message, "A Pending status Provider Notification (SOC 858) may not be inactivated."
50	12318	CI-111962 - DSD EM CM 050 IMPLEMENTED	Modify Case Home	When an attempt is made to save a Modify Case Home screen and a Resource Suspension End Date is indicated and the Case Status is not Leave.	Do not allow the action	Display the error message, "Resource Suspension End Date is only allowed on a case with Leave Status case"
51	12003 16113	CI-111949 - DSD EM CM 051 IMPLEMENTED	Modify Case Home	When an attempt is made to save a Modify Case Home screen and the case is in Leave Status and a Resource Suspension End Date is changed to a date prior to the Authorization End Date.	Do not allow the action	Display the error message, "Resource Suspension End Date may not be before case Authorization End Date [MM/DD/YYYY]"
52	12003	CI-111926 - DSD EM CM 052 IMPLEMENTED	Leave Case	When an attempt is made to save a Leave Case screen and the reason is 'Undervalue disposal of resources' and the Funding Source for the current month is not IHSS-R.	Do not allow the action	Displays the error message, "The Reason not valid for the Funding Source indicated"
53	12159	CI-111935 - DSD EM CM 053 IMPLEMENTED	Cancel Transfer	When the Yes link is selected on the Cancel Transfer Request screen and Pending Evidence with the Assessment Type of Inter-County Transfer exists.	Do not allow the action	Display the error message, "A Transfer cancellation is not allowed with Pending "Inter-County Transfer" Assessment evidence"
54	12160	CI-111997 - DSD EM CM 054 IMPLEMENTED	Delete Pending Evidence (Service Eligibility)	When the Delete Pending Evidence link is selected and the Pending Evidence Assessment Type is Inter-County Transfer and the user taking the action is not a user in the Receiving County.	Do not allow the action	Display the error message, "Deletion of Pending "Inter-County Transfer" evidence is only permitted for a user in the Receiving County"
58	12516	CI-111932 - DSD EM CM 058 IMPLEMENTED	Reactivate Case	When an attempt is made to save a Reactivate Case screen and the associated Person record Death Outcome is Death Confirmed.	Do not allow the action	Display the error message, "Case Reactivation not allowed for indicated Person Death Outcome."
59	16548	CI-111960 - DSD EM CM 059 IMPLEMENTED	Create Form	When an attempt is made to save a Create Form screen and the user entered more than 700 characters in the Paramedical Form Text field.	Do not allow the action	Display the error message, "Paramedical Form Text is too long (853) - maximum allowed is '700'."
60		This Error Message was removed with CR 871				

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (61-80)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
61	12159	CI-111973 - DSD EM CM 061 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Area Code is other than three numeric digits	Do not allow the action	Display the error message "Area Code must be three numeric digits."
62	12159	CI-111958 - DSD EM CM 062 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Phone Number entered is not seven (7) numeric characters	Do not allow the action	Display the error message "Phone number must be seven numeric digits."
63	12159	CI-111961 - DSD EM CM 063 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Area Code is other than three numeric digits	Do not allow the action	Display the error message "Area Code must be three numeric digits."
64	12159	CI-111965 - DSD EM CM 064 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Phone Number entered is not seven (7) numeric characters	Do not allow the action	Display the error message "Phone number must be seven numeric digits."
65	12159	CI-111990 - DSD EM CM 065 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Extension contains other than numeric characters	Do not allow the action	Display the error message "Phone number extension format must be numeric."
66	12159	CI-111959 - DSD EM CM 066 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Extension contains other than numeric characters	Do not allow the action	Display the error message "Phone number extension format must be numeric."
67	16688	CI-111977 - DSD EM CM 067 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit screen and the Home Visit date is a future date	Do not allow the action	Display the error message, "Initial Home Visit Date may not be a future date."
68	16688	CI-111979 - DSD EM CM 068 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit screen and the Visit Focus field indicates "Recipient" and the Provider field is not blank	Do not allow the action	Display the error message, "Visit Focus does not allow Provider indication."
69	16688	CI-111918 - DSD EM CM 069 IMPLEMENTED	Modify Unannounced Home Visit	When the Save link is selected on the Modify Unannounced Home Visit screen and the Visit Focus field indicates "Recipient" and the Provider field is not blank	Do not allow the action	Display the error message, "Visit Focus does not allow Provider indication."
70	16688	CI-111953 - DSD EM CM 070 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit and the Visit Focus field indicates "Provider" and the Provider field is blank	Do not allow the action	Display the error message, "When Visit Focus is Provider, a Provider must be selected."
71	16688	CI-111927 - DSD EM CM 071 IMPLEMENTED	Modify Unannounced Home Visit	When the Save link is selected on the Modify Unannounced Home Visit and the Visit Focus field indicates "Provider" and the Provider field is blank	Do not allow the action	Display the error message, "When Visit Focus is Provider, a Provider must be selected."
72	16688	CI-111983 - DSD EM CM 072 IMPLEMENTED	Unannounced Home Visit list screen	When the "Inactivate" link is selected for a specific record and that record has an indicated "Outcome"	Do not allow the action	Display the error message, "Inactivate action not allowed on Unannounced Home Visit record with indicated Outcome."
73	12260 16940	CI-111967 - DSD EM CM 073 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected and the Termination Reason No Longer in own home is indicated and the Meets Residency Requirement is not indicated as No longer in own Home	Do not allow the action	Display the error message, "Meets Residency Requirement must match Termination Reason."

74	12260 16940	CI-111954 - DSD EM CM 074 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected and the Meets Residency requirement is not "Non-California Residence" and the Termination Reason is one of the following: <ul style="list-style-type: none">• Out of State longer than 60 days• Out of Country longer than 30 days• Moved out of State	Do not allow the action	Display the error message, "Meets Residency Requirement must match Termination Reason."
75	12260 16940	CI-111963 - DSD EM CM 075 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected and the Termination Reason "Whereabouts unknown" is indicated and the Meets Residency Requirement is not indicated as "Whereabouts unknown"	Do not allow the action	Display the error message, "Meets Residency Requirement must match Termination Reason."
76	16188	CI-111936 - DSD EM CM 076 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome is other than Pending, Conditional Withdrawal or Complete Withdrawal and the Scheduled Hearing Date is blank.	Do not allow the action	Display the error message "A Scheduled Hearing Date is required for this Outcome."
77	16188	CI-111919 - DSD EM CM 077 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Compliance Form Sent Date field is indicated and all other Details fields are blank	Do not allow the action	Display the error message "Compliance Form Sent Date must have an Outcome indicated."
78	16188	CI-111976 - DSD EM CM 078 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Compliance Form Sent Date is before the Outcome Date.	Do not allow the action	Display the error message "Compliance Form Sent Date cannot be before the Outcome Date."
79	16188	CI-111934 - DSD EM CM 079 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and an Outcome other than Pending is indicated and the Outcome Date is blank.	Do not allow the action	Display the error message "Outcome Date is required when the Outcome is indicated."
80	16188	CI-111971 - DSD EM CM 080 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome Date is indicated and the Outcome is blank.	Do not allow the action	Display the error message "Outcome is required when the Outcome Date is indicated"

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (81-100)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
81	16187 16185	↳ CI-111930 - DSD EM CM 081 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome Date is before Scheduled Hearing Date.	Do not allow the action	Display the error message "Outcome Date cannot be before Scheduled Hearing Date."
82	16187 16185	↳ CI-111923 - DSD EM CM 082 IMPLEMENTED	Modify State Hearing	When an attempt is made to save a Create State Hearing screen and the Compliance Form Sent Date field is indicated and all other Details fields are blank	Do not allow the action	Display the error message "Compliance Form Sent Date must have an Outcome indicated."
85	16186	↳ CI-111988 - DSD EM CM 085 IMPLEMENTED	Create State Hearing	When an attempt is made to Create State Hearing and request date is before the Application Date.	Do not allow the action	Display the error message "Request Date cannot be before Application Date".
86	16688	↳ CI-111974 - DSD EM CM 086 IMPLEMENTED	Create Unannounced Home Visit	When an attempt is made to Create Unannounced Home Visit and Home Visit Date is before the Application Date.	Do not allow the action	Display the error message "Home Visit Date cannot be before the Application Date".
87	12318	↳ CI-111969 - DSD EM CM 087 IMPLEMENTED	Withdraw Case	When an attempt is made to save a Withdraw Case and Withdrawal Date is before the Application Date.	Do not allow the action	Display the error message "Withdrawal Date cannot be before the Application Date".
88	12318	↳ CI-111978 - DSD EM CM 088 IMPLEMENTED	Leave Case	When an attempt is made to save a Leave Case and Resource Suspension End Date is before Leave Case Authorization End Date.	Do not allow the action	Display the error message "Resource Suspension End Date cannot be before Leave Case Authorization End Date".
89	12260 16113 16940	↳ CI-111968 - DSD EM CM 089 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and an authorization with a future date exists with a Status of Terminated or Leave and the Terminate Case Authorization End Date is after the previous Authorization End Date	Do not allow the action	Display the error message, "Future Authorization with Termination or Leave already exists; verify Authorization."
90	12501	↳ CI-111937 - DSD EM CM 090 IMPLEMENTED	Leave Case	When the Save link is selected on the Leave Case screen and an authorization with a future date exists with a Status of Terminated or Leave and the Leave Case Authorization End Date is after the previous Authorization End Date	Do not allow the action	Display the error message, "Future Authorization with Termination or Leave already exists; verify Authorization."
91	12159	↳ CI-111917 - DSD EM CM 091 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-county Transfer screen and the Receiving County is the same as the Sending County	Do not allow the action	Display the error message, "Sending and Receiving County may not be the same county."
92	12261 12264	↳ CI-111948 - DSD EM CM 092 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case with CIN selection screen <ul style="list-style-type: none"> • And the Termination Reason is other than Recipient Death (NOA TR17) • And the CIN selection does not have active Medi-Cal 	Do not allow the action	Display the error message, "Rescind action not allowed when CIN does not have active Medi-Cal eligibility."
93	12318	↳ CI-116345 - DSD EM CM 093 IMPLEMENTED	Withdraw Case	When the Save link is selected on the Withdraw Case screen and the Withdrawal Date is not the current or a prior date	Do not allow the action	Display the error message "Withdrawal date must be on or before the current date."
94	12318	↳ CI-116346 - DSD EM CM 094 IMPLEMENTED	Withdraw Case	When the Save link is selected on the Withdraw Case screen and the Withdrawal Date is prior to the Application Date	Do not allow the action	Display the error message "Withdrawal date must be on or after the Application Date."
95	12260 16113 16940	↳ CI-116347 - DSD EM CM 095 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Authorization End Date is more than one month in the future	Do not allow the action	Display the error message "Termination Authorization End Date may not be more than one month in the future."

96	16113 16941	CI-116348 - DSD EM CM 096 IMPLEMENTED	Leave Case	When the Save link is selected on the Leave Case screen and the Authorization End Date is more than one month in the future	Do not allow the action	Display the error message "Leave Case Authorization End Date may not be more than one month in the future."
98	12510 20782	CI-116350 - DSD EM CM 098 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen and the current Case Status is Denied, Terminated or Withdrawn and the From Date associated with the Status is the current date	Do not allow the action	Display the Error Message "Case may not be Reactivated the same day as a Denial, Termination or Withdrawal action was taken."
99	12264 16719 16720	CI-117722 - DSD EM CM 099 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case screen and the associated Person record has an Alternative ID Type Social Security Number with a Duplicates indication of "Duplicate SSN" or "Suspect SSN"	Do not allow the action	Display the error message, "Rescind Action not allowed when Alternative ID Type Social Security Number is indicated as [Duplicates value]."
100	16719 16720 20782	CI-117723 - DSD EM CM 100 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen and the associated Person record has an Alternative ID Type Social Security Number with a Duplicates indication of "Duplicate SSN" or "Suspect SSN"	Do not allow the action	Display the error message, "Reactivate Action not allowed when Alternative ID Type Social Security Number is indicated as [Duplicates value]."

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (101-120)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
101	12160	CI-117146 - DSD EM CM 101 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the current active evidence has an Authorization End Date prior to the current date	Do not allow the action	Display the error message "Case authorization must be current before Inter-County Transfer can be created."
102	12160	CI-117147 - DSD EM CM 102 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and an Inter-County Transfer record exists with at Status of "In Progress"	Do not allow the action	Display the error message "In Progress Inter-County Transfer exists. User must either Complete or Cancel existing Inter-County Transfer."
103	12159	CI-117148 - DSD EM CM 103 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the New Phone Number indicates an Area Code and the Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Area Code indicated."
104	12159	CI-117149 - DSD EM CM 104 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the New Phone Number indicates an Phone Number and the Area Code field is blank	Do not allow the action	Display the error message "Area Code required if Phone Number indicated."
105	12159	CI-117150 - DSD EM CM 105 IMPLEMENTED	Create Inter-County Transfer	When the Save link is selected on the Create Inter-County Transfer screen and the Extension Number indicates an Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Extension Number indicated."
106	12159	CI-117151 - DSD EM CM 106 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the New Phone Number indicates an Area Code and the Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Area Code indicated."
107	12159	CI-117152 - DSD EM CM 107 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the New Phone Number indicates an Phone Number and the Area Code field is blank	Do not allow the action	Display the error message "Area Code required if Phone Number indicated."
108	12159	CI-117153 - DSD EM CM 108 IMPLEMENTED	Modify Inter-County Transfer	When the Save link is selected on the Modify Inter-County Transfer screen and the Extension Number indicates an Phone Number field is blank	Do not allow the action	Display the error message "Phone number required if Extension Number indicated."
109	16875	CI-117995 - DSD EM CM 109 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Reason is "Recipient Death" and the associated person record does not have a Date of Death	Do not allow the action	Display the error message, "Date of Death required with selected reason."
110	12037 12510	CI-119149 - DSD EM CM 110 IMPLEMENTED	Create Workplace Hours	When the Save link is selected on the Create Workplace Hours screen and the Workplace Hours Start Date is prior to the Inter-County Transfer Start Date and the Workplace Hours End Date is after the Inter-County Transfer Start Date	Do not allow the action	Display the error message "Workplace Hours Start and End Date may not span Inter-County Transfer Authorization Start Date [MM/DD/YYYY]."

111	16882	CI-290356 - DSD EM CM 111 <small>IMPLEMENTED</small>	Terminate Case	When the Yes link is selected on the Terminate Case screen AND the Termination Reason is Health Care Certification – Not Received AND the Authorization End Date is on or before • The Due Date OR, if indicated, the Good Cause Extension Due Date	Do not allow the action	Display the error Message, "Reason not allowed when Authorization End Date is on or before [Applicable Due Date*]." *Applicable Due Date is either "Due Date" or, if indicated, "Good Cause Extension Due Date"
112	16110 16111 16112	CI-290392 - DSD EM CM 112 <small>IMPLEMENTED</small>	Reactivate Case	When the Save link is selected on the "Reactivate Case" screen and "IHSS Referral Date" is changed to a date more than two weeks prior to the current date	Do not allow the action	Display the error message "Updated Referral Date may not be dated more than two weeks (14 calendar days) prior to the current date."
113	16110 16112	CI-290393 - DSD EM CM 113 <small>IMPLEMENTED</small>	Reactivate Case	When the Save link is selected on the "Reactivate Case" screen and "IHSS Referral Date" is changed to a date future to the displayed IHSS Referral Date	Do not allow the action	Display the error message "IHSS Referral Date may not be changed to a date future to the displayed IHSS Referral Date."
114	12083	CI-290723 - DSD EM CM 114 <small>IMPLEMENTED</small>	Terminate Case	When the Save link is selected on the Terminate Case screen And the selected Termination Reason is "Recipient did not pay IHSS Share of Cost" And the funding source is not IHSS-R	Do not allow the action	Display the error message "Termination Reason not allowed for Funding Source other than IHSS-R."
115	16113	CI-294007 - DSD EM CM 115 <small>IMPLEMENTED</small>	Leave Case	When the Save link is selected on the Leave Case screen And the current case authorization decision is Eligible And the current case Authorization End Date is before the Leave Case Authorization End Date	Do not allow the action	Display the error message, "Most recent case assessment Authorization End Date is in the past. Update case assessment before taking Leave Case or Terminate Case action. Please note the action in the Assessment Narrative."
116	16113	CI-294008 - DSD EM CM 116 <small>IMPLEMENTED</small>	Terminate Case	When the Save link is selected on the Terminate Case screen And the current case authorization decision is Eligible And the current case Authorization End Date is before the Terminate Case Authorization End Date	Do not allow the action	Display the error message, "Most recent case assessment Authorization End Date is in the past. Update case assessment before taking Leave Case or Terminate Case action. Please note the action in the Assessment Narrative."
117	16927	CI-434185 - DSD EM CM 117 <small>IMPLEMENTED</small>	Reactivate Case	When the Save link is selected on the Reactivate Case screen and an SCI search has not been performed	Do not allow the action	Display the error message, "Client Index Number search is required."
118	12318	CI-437005 - DSD EM CM 118 <small>IMPLEMENTED</small>	Terminate Case	When the Save link is selected on the Terminate Case screen and Pending Evidence exists on the case	Do not allow the action	Display the error message, "Please delete this Pending Evidence before processing Leave or Terminate Case action."
119	12318	CI-437004 - DSD EM CM 119 <small>IMPLEMENTED</small>	Leave Case	When the Save link is selected on the Leave Case screen and Pending Evidence exists on the case	Do not allow the action	Display the error message, "Please delete this Pending Evidence before processing Leave or Terminate Case action."
120	16939	CI-444527 - DSD EM CM 120 <small>IMPLEMENTED</small>	Modify Medi-Cal Eligibility	When the Save link is selected on Modify Medi-Cal Eligibility screen and the month MM/YYYY indicated is more than one month future to the current month	Do not allow the action	Display the error message, "Eligibility may not be added for a future month"

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (121-140)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
121	16939	CI-444528 - DSD EM CM 121 IMPLEMENTED	Modify Medi-Cal Eligibility	When the Save link is selected on the Eligibility Month screen and the month MM/YYYY indicated is more than 13 months prior to the current month	Do not allow the action	Display the error message, "Eligibility period being added may not be more than 13 months before the current month."
122	16939	CI-444529 - DSD EM CM 122 IMPLEMENTED	Modify Medi-Cal Eligibility	When the Save link is selected on the Modify Medi-Cal Eligibility screen and the FFP is changed from N to Y and the Medi-Cal Aid Code is not 10, 20 or 60.	Do not allow the action	Display the error message, "FFP may only be set to Y when Medi-Cal Aid Code is 10, 20 or 60."
123	16939	CI-444530 - DSD EM CM 123 IMPLEMENTED	Modify Medi-Cal Eligibility	When the Save link is selected on the Modify Medi-Cal Eligibility screen and the FFP has changed from N to Y and the Medi-Cal Aid Code, FFP and Eligibility Status are not an exact match to the previous months records	Do not allow the action	Display the error message, "The month being changed from FFP N to FFP Y must be an exact match for the previous month for Medi-Cal Eligibility Status, Medi-Cal Aid Code and FFP."
124	16939	CI-444531 - DSD EM CM 124 IMPLEMENTED	Modify Medi-Cal Eligibility	When the Save link is selected on the Modify Medi-Cal Eligibility Screen and Eligibility Month has been updated and another field on the screen has been changed	Do not allow the action	Display the error message, "When Eligibility Month is changed no other changes are allowed".
125	16939	CI-444532 - DSD EM CM 125 IMPLEMENTED	Modify Medi-Cal Eligibility	When the Save link is selected on Modify Medi-Cal Eligibility screen and the month is changed to a month which already exists	Do not allow the action	Display the error message, "Modification to an existing MEDS Eligibility month must be made to the existing record."
126	12264 16971	CI-445315 - DSD EM CM 126 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case screen and any of the following conditions occur: Condition: FFP Change – any change to the MEDS Eligibility FFP in the Authorization Period prior to Termination Condition: Benefit Level Change – the case has Share of Cost Evidence and a Cost of Living Adjustment was processed after the case termination Condition: Wage Rate Update – A county Wage Rate Change was processed for the Authorization Period prior to Termination Condition: State Mandated Change - A State Mandated Change was processed for the Authorization Period prior to Termination Condition: Funding Source Change – After the case termination a Provider was terminated from the case with a Termination Begin Date prior to the Case Termination "From" date Condition: CFCO Funding Source Implementation - After the case termination the CFCO Funding Source was implemented.	Allow the action	<p>Continue to display the Rescind Case screen. Change the "Save" link to a "Continue" link</p> <p>Display the informational message, "Authorization End Date has changed due to [Condition: FFP Change, Benefit Level Change, Wage Rate Update, State Mandated Change, Funding Source Change, or CFCO Funding Source Implementation]. After Rescind action is processed, create and authorize a Change Assessment for period MM/DD/YYYY to MM/DD/YYYY."</p> <p>Where the first MM/DD/YYYY is the first day of the month in which: The FFP changed Or the Benefit Level (COLA) Begin Date Or the Wage Rate Begin Date Or the State Mandated Begin Date Or the Funding Source change occurred due to Provider termination Or the CFCO Funding Source Begin Date</p> <p>Where the second MM/DD/YYYY is the Authorization End Date prior to Termination</p>
127	16941	CI-445316 - DSD EM CM 127 IMPLEMENTED	Leave Case	When the Save link is selected on the Leave Case screen and the Leave Case Authorization End Date is before the latest of either: The Case Application Date Or the Initial Assessment Authorization Start Date	Do not allow the action	Display the error message, "The Leave Case Authorization End Date must be on or after MM/DD/YYYY [display either the Application Date or Initial Assessment Authorization Start Date]."

128	16940	CI-445317 - DSD EM CM 128 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate case screen and the Terminate Case Authorization End Date is before the latest of either: The Case Application Date Or the Initial Assessment Authorization Start Date	Do not allow the action	Display the error message, "The Terminate Case Authorization End Date must be on or after MM/DD/YYYY [display either the Application Date or Initial Assessment Authorization Start Date]."
129	12264	CI-445318 - DSD EM CM 129 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case screen and the current Case Status is Denied or Terminated and the most recent Assessment Type is Conversion	Do not allow the action	Display the error message, "Rescind action is not allowed on a case which was terminated or denied prior to conversion. Please use the Reactivate case process."
130	16940	CI-445378 - DSD EM CM 130 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and an "In-Progress" Inter-County Transfer exists on the case	Do not allow the action	Display the error message, "Case may not be Terminated when an In-Progress Inter-County Transfer exists."
131	12173	CI-451612 - DSD EM CM 131 IMPLEMENTED	Leave Case	When the Save link is selected on the Leave Case screen and an In-Progress Inter-County Transfer exists	Do not allow the action	The data in this screen will not be saved and the following message displays: "Leave case action not allowed when an In-Progress Inter-County Transfer exists."
132	16963	CI-451611 - DSD EM CM 132 IMPLEMENTED	Leave Case	When the Save link is selected on the Leave Case screen and Authorization End Date is prior to the most recent Inter-County Transfer Authorization Start Date	Do not allow the action	The data in this screen will not be saved and the following message displays: "Leave case action not allowed for a period prior to most recent Inter-County Transfer Authorization Start Date."
133	12072 12073	CI-480775 - DSD EM CM 133 IMPLEMENTED	Create Recipient Overtime Agreement	When the Save link is selected on the Create Recipient Overtime Agreement screen and the Date Received is prior to [MM/DD/YYYY] [MM/DD/YYYY] FLSA Configuration: ROTDeclarationStartDate	Do not allow the action.	Display the error message "The Date Received cannot be before [MM/DD/YYYY]."
134	12072 12073	CI-480770 - DSD EM CM 134 IMPLEMENTED	Create Recipient Overtime Agreement	When the Save link is selected on the Create Recipient Overtime Agreement screen and the date entered is a date in the future	Do not allow the action.	Display the error message "The Date Received cannot be a future date."
135	12072 12073	CI-480809 - DSD EM CM 135 IMPLEMENTED	Create Recipient Overtime Agreement – Multiple records	When the Save link is selected on the Create Recipient Overtime Agreement screen and an "Active" status Recipient Overtime Agreement exists	Do not allow the action.	Display the error message "Only one "Active" status Recipient Overtime Agreement record is allowed. If the existing record is incorrect, please Inactivate the existing record and then another record can be created."
136	20734	CI-480810 - DSD EM CM 136 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the total hours and minutes entered for any day indication is greater than 24:00 (HH:MM)	Do not allow the action.	Display the error message "Total time entered in a single day field cannot exceed 24:00."
137	20734	CI-480813 - DSD EM CM 137 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen and the total hours and minutes entered for any day indication is greater than 24:00 (HH:MM)	Do not allow the action.	Display the error message "Total time entered in a single day field cannot exceed 24:00."
138	20734	CI-480806 - DSD EM CM 138 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the "Total Hours" field is zero (00:00).	Do not allow the action.	Display the error message "Entry is required in at least one daily time entry field."
139	20734	CI-480772 - DSD EM CM 139 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement and the "Total Hours" field is zero (00:00).	Do not allow the action.	Display the error message "Entry is required in at least one daily time entry field."
140	20734	CI-480771 - DSD EM CM 140 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement pop-up AND the current Provider status is "On-Leave"	Do not allow the action.	Display the error message "On-Leave status provider may not be selected".

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (141-160)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
141	20734	CI-480769 - DSD EM CM 141 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and Provider Type does not match the Provider Type on the selected Provider	Do not allow the action.	Display the error message "Provider Type does not match the Provider Type on the selected record. Please update."
142	20734	CI-480822 - DSD EM CM 142 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement and the "Total" field is greater than 40:00 (HH:MM)	Allow the action	Change "Save" link to "Continue" and display the informational message "Total time entered for the Recipient Workweek Agreement exceeds 40:00. If this is correct, select the Continue link, if not select Cancel and update screen accordingly."
143	20734	CI-480807 - DSD EM CM 143 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen and the "Total" is greater than 40:00 (HH:MM)	Allow the action	Change "Save" link to "Continue" and display the informational message "Total time entered for the Recipient Workweek Agreement exceeds 40:00. If this is correct, select the Continue link, if not select Cancel and update screen accordingly."
144	20734	CI-480812 - DSD EM CM 144 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and an "Active" status Recipient Workweek Agreement already exists for the Provider with the same Provider Type	Do not allow the action.	Display the error message "Action not allowed because a Recipient Workweek Agreement already exists for this Provider and Provider Type."
145	20734	CI-480776 - DSD EM CM 145 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen And the Program Type is WPCS And the user is not a WPCS user	Do not allow the action	Display the error message "A WPCS Workweek Agreement may only be created by a WPCS user."
146	20734	CI-480938 - DSD EM CM 146 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen And the Program Type is IHSS And the user is not a IHSS user	Do not allow the action	Display the error message "A IHSS Workweek Agreement may only be created by an IHSS user."
147	20734	CI-480939 - DSD EM CM 147 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen And the Program Type is WPCS And the user is not a WPCS user	Do not allow the action	Display the error message "A WPCS Workweek Agreement may only be created by a WPCS user."
148	20734	CI-480940 - DSD EM CM 148 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen And the Program Type is IHSS And the user is not a IHSS user	Do not allow the action	Display the error message "A IHSS Workweek Agreement may only be created by an IHSS user."
149	20743	CI-480977 - DSD EM CM 149 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement and the "Total Hours" entered are greater than the Recipient Weekly Authorized Hours for the current, if available, or latest authorization month	Do not allow the action.	Display the error message "Total Hours may not exceed the Recipient Weekly Authorized Hours [XX:XX]." XX:XX = The weekly authorized hours for the current month from the Weekly Authorized Hours field on the Authorization Summary screen.

150	20743	CI-480978 - DSD EM CM 150 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement and the "Total Hours" entered are greater than the Recipient Weekly Authorized Hours for the current, if available, or latest authorization month	Do not allow the action.	Display the error message "Total Hours may not exceed the Recipient Weekly Authorized Hours [XX:XX]".
151	20734	CI-480979 - DSD EM CM 151 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the From Date is not the first day of a month	Do not allow the action	Display the error message, "From Date must be the first day of a month."
152	20734	CI-480980 - DSD EM CM 152 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the To Date is not the last day of a month	Do not allow the action	Display the error message, "To Date must be the last day of a month."
153	20734	CI-480981 - DSD EM CM 153 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the span of the From Date and To Date exceeds 12 calendar months	Do not allow the action	Display the error message, "Search is limited to a twelve (12) calendar month period. Please adjust From or To dates."
154		Removed due to conflict with BR #116 – DSD Section 25				
155	20734	CI-480983 - DSD EM CM 155 IMPLEMENTED	Monthly Overtime Maximums Search	When the Search link is selected on the Monthly Overtime Maximums screen and the To Date is before the From Date	Do not allow the action	Display the error message, "To Date must be after the From Date."
156	20734	CI-480984 - DSD EM CM 156 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the most recent Recipient Workweek Agreement has the system high date as the End Date and the Begin Date is equal to or before the most recent Recipient Workweek Agreement Begin Date	Do not allow the action	Display the error message, "Begin Date must be at least one day after the Begin Date on the most recent Recipient Workweek Agreement."
157	20734	CI-480985 - DSD EM CM 157 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the Begin Date is before the FLSA Config SOC2256StartDate	Do not allow the action	Display the error message, "Begin Date may not be before MM/DD/YYYY." MM/DD/YYYY = FLSA Config SOC2256StartDate
158	20734	CI-480986 - DSD EM CM 158 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement screen and the Provider Type is WPCS and the Total Hours is greater than WPCS Hours for the month	Do not allow the action	Display the error message, "Total Hours may not exceed WPCS Hours for the month."
159	20734	CI-480987 - DSD EM CM 159 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement screen and the Provider Type is WPCS and the Total Hours is greater than WPCS Hours for the month	Do not allow the action	Display the error message, "Total Hours may not exceed WPCS Hours for the month."
160	20734	CI-480988 - DSD EM CM 160 IMPLEMENTED	Inactivate Recipient Workweek Agreement	When the "Yes" link is selected on the Inactive Recipient Workweek Agreement confirmation screen and the Program Type is IHSS and the user is not an IHSS user	Do not allow the action	Display the error message "An IHSS Workweek Agreement record may only be inactivated by an IHSS user."

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (161-180)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
161	20734	CI-480989 - DSD EM CM 161 IMPLEMENTED	Inactivate Recipient Workweek Agreement	When the "Yes" link is selected on the Inactive Recipient Workweek Agreement confirmation screen and the Program Type is WPCS and the user is not a WPCS user	Do not allow the action	Display the error message "A WPCS Workweek Agreement record may only be inactivated by a WPCS user."
162			Removed via CR 1040			
163			Removed via CR 1134			
164			Removed via CR 1040			
165			Removed via CR 1134			
166			Removed via CR 1040			
167			Removed via CR 1134			
168			Removed via CR 1040			
169			Removed via CR 1134			
170		CI-486324 - DSD EM CM 170 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
171		CI-486325 - DSD EM CM 171 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
172		CI-486326 - DSD EM CM 172 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
173		CI-486327 - DSD EM CM 173 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
174		CI-486328 - DSD EM CM 174 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
175		CI-486329 - DSD EM CM 175 CANCELLED	Cancelled by CR1 15 CGI M&O – PSR – EVV Simplification			
176			Removed with CR 1199			
177		CI-486331 - DSD EM CM 177 CANCELLED	Cancelled by ASR Sprint 11 Team 1&2			

178	20782	 CI-489589 - DSD EM CM 178 IMPLEMENTED	Reactivate Case with IHSS Referral Date is on or before most recent "Eligible" authorization segment	When the Save link is selected on the Reactivate Case screen and IHSS Referral Date indicated is equal or prior to the Authorization End Date on the most recent "Eligible" authorization record	Do not allow the action	Display the error message, "Reactivate Action Referral Date must be at least one day after the Authorization End Date [MM/DD/YYYY] for the most recent 'Eligible' authorization." *MM/DD/YYYY is Authorization End Date of most recent Eligible Authorization segment
179	16647 16940	 CI-489590 - DSD EM CM 179 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Reason is Recipient Death and the Authorization End Date does not match the Date of Death	Do not allow the action	Display the error message, "Authorization End Date must match Date of Death [MM/DD/YYYY] on the Person Home when Termination Reason is Recipient Death."
180	16940	 CI-489591 - DSD EM CM 180 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen and the Authorization End Date is a date before the most recent Inter-County Transfer Authorization Start Date and the Termination Reason is other than Recipient Death	Do not allow the action	Display the error message, "Case may not be terminated for [Terminate Reason] on a date prior to the Inter-County Transfer Start Date [MM/DD/YYYY]. Terminate Case Authorization End Date must be on or after [MM/DD/YYYY]." Both MM/DD/YYYY fields are populated with the most recent Inter-County Transfer Authorization Start Date

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (181-200)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
181	16940	↳ CI-489592 - DSD EM CM 181 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Termination Reason is Health Care Certification – Not Received AND the Health Care Certification Type is other than blank	Do not allow the action	Display the error message, 'Case may not be terminated for "Health Care Certification – Not Received" when the Health Care Certification Type is other than blank.'
182	12623	↳ CI-489593 - DSD EM CM 182 IMPLEMENTED	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen with End Date that is before the Start Date.	Do not allow the action	Display the error message "End Date must be after Start Date."
183	12623	↳ CI-489594 - DSD EM CM 183 IMPLEMENTED	Modify WPCS Hours	When the Save link is selected on the Modify WPCS Hours screen AND A previous WPCS Hours records exists AND Any date between the Start Date or End Date on the Modify WPCS Hours screen overlaps with a date of the previous segment.	Do not allow the action	Display the error message "The modified WPCS hours segment overlaps with an existing segment."
184	12623	↳ CI-489595 - DSD EM CM 184 IMPLEMENTED	Modify WPCS Hours	When the Save link is selected on the Modify WPCS Hours screen AND A date within the authorization period entered is prior to 05/01/2022 AND The Medi-Cal FFP indication for that service month is 'No'.	Do not allow the action	Display the error message "WPCS Hours are not allowed when Medi-Cal FFP is 'No' for service months prior to 05/01/2022."
185	12623	↳ CI-489596 - DSD EM CM 185 IMPLEMENTED	Create WPCS Hours	When the Save link is selected on the Create WPCS Hours screen and WPCS Start Date is before the most recent Initial Assessment Authorization Start Date	Do not allow the action	Display the error message "WPCS Hours Start Date may not be before the most recent Initial Assessment Authorization Start Date [MM/DD/YYYY]." MM/DD/YYYY = Most recent Initial Assessment Authorization Start Date
186	12623	↳ CI-489597 - DSD EM CM 186 IMPLEMENTED	Modify WPCS Hours	When the Save link is selected on the Modify WPCS Hours screen and WPCS Start Date is before the most recent Initial Assessment Authorization Start Date	Do not allow the action	Display the error message "WPCS Hours Start Date may not be before the most recent Initial Assessment Authorization Start Date [MM/DD/YYYY]." MM/DD/YYYY = Most recent Initial Assessment Authorization Start Date
187	20782	↳ CI-489598 - DSD EM CM 187 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen and the most recent Inter-County Transfer Authorization Start Date is in the same calendar month as the current "IHSS Referral Date" or if the IHSS Referral Date is one day following the most recent Termination Authorization End Date And the user taking the "Reactive" action is in the same county as the most recent Inter-County Transfer "Sending County"	Do not allow the action	Display the error message, "Reactivate Case action not allowed. Please have [County 1] process the Rescind Case action and perform an Inter-County Transfer to [County 2] County." [County 1 = Current ICT Receiving County; County 2 = Current ICT Sending County]

188	20804	CI-497794 - DSD EM CM 188 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected on the Modify and Inactivate Form screen AND The Regenerate check box on the BVI Format cluster is selected AND The Status on the BVI Format cluster is Pending Generation	Do not allow the action	Display the message: "Regenerate Action not allowed when BVI document is in Pending Generation Status."
189			Removed with CR 1048			
190			Removed with CR 1048			
191			Removed with CR 1048			
192			Removed with CR 1048			
193			Removed with CR 1048			
194			Removed with CR 1048			
195	20770	CI-497878 - DSD EM CM 195 IMPLEMENTED	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The Notice of Action Option of "Large Font NOA" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
196	20770	CI-497879 - DSD EM CM 196 IMPLEMENTED	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The Notice of Action Option of "Large Font NOA" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
197	20770	CI-497880 - DSD EM CM 197 IMPLEMENTED	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The IHSS Required Forms Option of "Large Font Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
198	20770	CI-497881 - DSD EM CM 198 IMPLEMENTED	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" has been selected AND The IHSS Required Forms Option of "Large Font Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Blind.'"
199		CI-497882 - DSD EM CM 199 CANCELLED	Cancelled by <![CDATA[CR115 CGI M&O – PSR – EVV Simplification			
200		CI-497883 - DSD EM CM 200 CANCELLED	Cancelled by <![CDATA[CR115 CGI M&O – PSR – EVV Simplification			

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (201-220)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
201	20770	 CI-497884 - DSD EM CM 201 <small>IMPLEMENTED</small>	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The Notice of Action Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
202	20770	 CI-497885 - DSD EM CM 202 <small>IMPLEMENTED</small>	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The Notice of Action Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected Notice of Action Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
203	20770	 CI-497886 - DSD EM CM 203 <small>IMPLEMENTED</small>	Set Blind or Visually Impaired Options – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The IHSS Required Forms Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
204	20770	 CI-497887 - DSD EM CM 204 <small>IMPLEMENTED</small>	Set Blind or Visually Impaired Options – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Visually Impaired" has been selected AND The IHSS Required Forms Option of "Braille Documents" has been selected	Do not allow the action	Display the message: "The selected IHSS Required Forms Option is not available for the Blind or Visually Impaired Indication of 'Visually Impaired.'"
205		 CI-497888 - DSD EM CM 205 <small>CANCELLED</small>	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
206		 CI-497889 - DSD EM CM 206 <small>CANCELLED</small>	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
207		 CI-497890 - DSD EM CM 207 <small>CANCELLED</small>	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			

208		CI-497891 - DSD EM CM 208 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
209	20770	CI-497892 - DSD EM CM 209 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's NOAs will be generated in English only."
210	20770	CI-497893 - DSD EM CM 210 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's NOAs will be generated in English only."
211	20770	CI-497894 - DSD EM CM 211 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required forms is not available in the indicated Recipient's Written Language. It will be generated in English."
212	20770	CI-497895 - DSD EM CM 212 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required forms is not available in the indicated Recipient's Written Language. It will be generated in English."
213		CI-497896 - DSD EM CM 213 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
214		CI-497897 - DSD EM CM 214 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
215			Removed with CR 980			
216			Removed with CR 980			
217		CI-497900 - DSD EM CM 217 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			

218		 CI-497901 - DSD EM CM 218 CANCELLED	Cancelled by CR11 5 CGI M&O – PSR – EVV Simplification			
219			Removed with CR 1134			
220			Removed with CR 1134			

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (221-240)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
221	20799	CI-497914 - DSD EM CM 221 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's Notice of Action is not available in the Recipient's indicated Written Language."
222	20799	CI-497915 - DSD EM CM 222 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The Notice of Action Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's Notice of Action is not available in the Recipient's indicated Written Language."
223			Removed with CR 1134			
224			Removed with CR 1134			
225			Removed with CR 1134			
226			Removed with CR 1134			
227	20734	CI-498700 - DSD EM CM 227 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement and there are entries in the Weekly field and entries in any of the Sunday through Saturday fields	Do not allow the action	Display the error message, "Hours entry is allowed in either the Weekly field or in one or more of the Sunday through Saturday daily fields, not both. Please update as appropriate."
228	20734	CI-498701 - DSD EM CM 228 IMPLEMENTED	Modify Recipient Workweek Agreement	When the Save link is selected on the Modify Recipient Workweek Agreement and there are entries in the Weekly field and entries in any of the Sunday through Saturday fields	Do not allow the action	Display the error message, "Hours entry is allowed in either the Weekly field or in one or more of the Sunday through Saturday daily fields, not both. Please update as appropriate."
229	12445 12455 20809	CI-500948 - DSD EM CM 229 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" is selected AND The Notice of Action Option of "Braille Documents" is selected AND The IHSS Required Forms Option of "Braille Documents" is selected AND The Recipient's written language indication is other than "English"	Allow the action with confirmation.	Change the Save link to Continue and display the message: "Notice of Actions and IHSS Required Forms will be produced in U. S. English Braille only."
230	12445 12455 20809	CI-500949 - DSD EM CM 230 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen AND The Blind or Visually Impaired Option of "Blind" is selected AND The Notice of Action Option of "Braille Documents" is selected AND The IHSS Required Forms Option of "Braille Documents" is selected AND The Recipient's written language indication is other than "English"	Allow the action with confirmation.	Change the Save link to Continue and display the message: "Notice of Actions and IHSS Required Forms will be produced in U. S. English Braille only."
231			Removed with CR 1134			

232			Removed with CR 1134			
233	20817	 CI-507517 - DSD EM CM 233 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Suppress NOA" check box is selected and the Comments box is blank	Do not allow the action	Display the error message, "When the Suppress NOA check box is selected a comment is required."
234	20817	 CI-507522 - DSD EM CM 234 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected on the Modify and Inactive From screen and the Suppress NOA checkbox is selected AND the Assessment Type is Initial Assessment	Do not allow the action	Display the error message, "Action not allowed when case Assessment Type is Initial Assessment."
235	20817	 CI-507514 - DSD EM CM 235 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the status is Suppressed AND a user has unselected the Suppress NOA check box	Do not allow the action	Display the error message, "Action is not allowed when the Status is Suppressed."
236	20817	 CI-507520 - DSD EM CM 236 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Suppress NOA" check box is selected AND the status is other than "Pending" or "Pending Reprint"	Do not allow the action	Display the error message, "Only a NOA in Pending or Pending Reprint status can be suppressed."
237	20817	 CI-507518 - DSD EM CM 237 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Suppress NOA" check box is selected AND the Form is not a NOA	Do not allow the action	Display the error message, "Only a NOA in Pending or Pending Reprint status can be suppressed."
238	20816	 CI-507516 - DSD EM CM 238 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected AND the Status is Pending AND any field in the "Reprint in Another Language" cluster has been indicated	Do not allow the action	Display the error message, "Action not allowed for a NOA in Pending status."
239	20816	 CI-507521 - DSD EM CM 239 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Language" in the "Reprint in Another Language" cluster is the same as either the original NOA language or the Language of a NOA already reprinted	Do not allow the action	Display the error message, "The reprint Language cannot be the same as previous NOA language."
240	20816	 CI-507515 - DSD EM CM 240 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected on the Modify and Inactivate Form screen AND the "Reprint in Another Language" cluster is indicated AND the associated NOA has already been reprinted twice	Do not allow the action	Display the error message, "Original NOA may only be reprinted twice. Please see Forms History screen for the pdf of the reprinted languages."

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (241-260)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
241	20816	CI-507524 - DSD EM CM 241 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Language" is indicated in the "Reprint in Another Language" cluster AND the Form is not a NOA	Do not allow the action	Display the error message, the "Reprint in Another Language" action is only allowed on NOAs."
242	20816	CI-507523 - DSD EM CM 242 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the Modify and Inactive Form screen and the Correspondence Details Status is Pending Reprint And the "Print in Another Language" field has been modified	Do not allow the action	Display the error message "Changes to Print in Another Language are not allowed when Correspondence Details Status is Pending Reprint."
243	20816	CI-507519 - DSD EM CM 243 IMPLEMENTED	Modify and Inactivate Form	When the Save link is selected and the "Inactivate/Not Mailed" check box is selected AND the status is "Pending" or "Pending Reprint" AND the Form is a NOA	Do not allow the action	Display the error message, "A NOA in Pending or Pending Reprint status may not be inactivated."
244	16187	CI-507540 - DSD EM CM 244 IMPLEMENTED	Create State Hearing	When an attempt is made to save a Create State Hearing screen and the Outcome is Erroneous Entry.	Do not allow the action.	Display the error message "Indicated Outcome not valid."
245	20905	CI-675580 - DSD EM CM 245 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Program Type is IHSS AND the user is a WPCS user	Do not allow action	Display the error message, "Action not allowed for a WPCS user when the Program Type is IHSS."
246	20905	CI-675581 - DSD EM CM 246 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Program Type is WPCS AND the user is a IHSS user	Do not allow action	Display the error message, "Action not allowed for an IHSS user when the Program Type is WPCS."
247	20905	CI-675582 - DSD EM CM 247 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Approved Hours are greater than the Requested Hours	Do not allow action	Display the error message, "Approved Hours cannot be greater than the Requested Hours."
248	20905	CI-675583 - DSD EM CM 248 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Comment field contains characters other than English alpha or numeric characters	Do not allow action	Display the error message, "Comment field allows only English language alpha, numeric and special characters." The following special characters are allowed: (- ! # \$ % & ' * + = ? ` { } ~ ^ - _ \ " < () : ; , [@]).
249	20905	CI-675584 - DSD EM CM 249 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Frequency is set to "One-Time" AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."
250	20905	CI-675585 - DSD EM CM 250 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Frequency is set to "On-Going" AND Request Outcome is Denied or Approved AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."

251	20905	CI-675586 - DSD EM CM 251 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Outcome Date is blank AND the Approved or any of the Denied reasons are chosen	Do not allow action	Display the error message, "Outcome Date is required when the Outcome is Approved or any of the Denied indications."
252	20905	CI-675587 - DSD EM CM 252 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Outcome Date is indicated AND the outcome is not Approved or any of the Denied conditions	Do not allow action	Display the error message, "Outcome of Approved or any of the Denied indications is required when the Outcome Date is indicated."
253	20905	CI-675588 - DSD EM CM 253 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND greater than 1000 characters are entered in the Comment field	Do not allow action	Display the error message, "Comments' is too long (XXXX) - maximum allowed is '1000'." [XXXX] = Number of characters 253 (Centered in field)
254	20905	CI-675589 - DSD EM CM 254 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND Program Type is IHSS AND the user is a WPCS user	Do not allow action	Display the error message, "Action not allowed for a WPCS user when the Program Type is IHSS."
255	20905	CI-675590 - DSD EM CM 255 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND Program Type is WPCS AND the user is a IHSS user	Do not allow action	Display the error message, "Action not allowed for an IHSS user when the Program Type is WPCS."
256	20905	CI-675591 - DSD EM CM 256 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Approved Hours are greater than the Requested Hours	Do not allow action	Display the error message, "Approved Hours cannot be greater than the Requested Hours."
257	20905	CI-675592 - DSD EM CM 257 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Comment field contains characters other than English alpha or numeric characters	Do not allow action	Display the error message, "Comment field allows only English language alpha, numeric and special characters." The following special characters are allowed: (- ! # \$ % & ' * + = ? ` { } ~ ^ - _ \ " < (>) : ; , [@]).
258	20905	CI-675593 - DSD EM CM 258 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND Frequency is set to "One-Time" AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."
259	20905	CI-675594 - DSD EM CM 259 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND Frequency is set to "On-Going" AND Request Outcome is Denied AND Flexible Hours End Date is populated	Do not allow action	Display the error message, "Flexible Hours End Date is not allowed."
260	20905	CI-675595 - DSD EM CM 260 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND Frequency is set to "On-Going" AND Request Outcome is Approved AND the current date is on or before the Outcome Letter Date AND Flexible Hours End Date is populated with a date other than 12/31/9999	Do not allow action	Display the error message, "Flexible Hours End Date may not be assigned prior to the generation of the Outcome Letter Date [MM/DD/YYYY]." MM/DD/YYYY – Outcome Letter Date

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (261-280)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
261	20905	 CI-675596 - DSD EM CM 261 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Cancellation Letter Date field is indicated AND the Flexible Hours End Date has been modified	Do not allow the action	Display the error message, "Flexible Hours End Date may not be modified when Cancellation Letter Date is indicated."
262	20905	 CI-675597 - DSD EM CM 262 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Outcome Date is blank AND the outcome is Approved or any of the Denied conditions	Do not allow action	Display the error message, "Outcome Date is required when the Outcome is Approved or any of the Denied indications."
263	20905	 CI-675598 - DSD EM CM 263 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Outcome Date is indicated AND the outcome is not Approved or any of the Denied conditions	Do not allow action	Display the error message "An Outcome of Approved or, any of the Denied indications is required when the Outcome Date is indicated."
264	20905	 CI-675599 - DSD EM CM 264 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND greater than 1000 characters are entered in the Comment field	Do not allow action	Display the error message, "The value entered is too long [XXXX] - maximum allowed is '1,000'" [XXXX] = Number of entered in field
265	20905	 CI-675600 - DSD EM CM 265 IMPLEMENTED	Inactivate	When the Yes link is selected on the Inactive Recipient Flexible Hours confirmation screen AND timesheets have been processed for the service month(s) indicated on the Flexible Hours screen AND the overtime hours paid for the service month(s) exceed the Monthly Overtime Maximum	Do not allow action	Display the error message, "Inactivate action not allowed when Flexible Hours have been paid."
266	20905	 CI-675601 - DSD EM CM 266 IMPLEMENTED	Create Recipient Flexible Hours	When the Save link is selected on the Create Recipient Flexible Hours screen AND the Approved outcome is indicated AND any Denied outcome is also indicated	Do not allow the action	Display the error message, "Request Outcome must be Indicated as either Approved or Denied, but not both."
267	20905	 CI-675602 - DSD EM CM 267 IMPLEMENTED	Modify Recipient Flexible Hours	When the Save link is selected on the Modify Recipient Flexible Hours screen AND the Approved outcome is indicated AND any Denied outcome is also indicated	Do not allow the action	Display the error message, "Request Outcome must be Indicated as either Approved or Denied, but not both."
268	20905	 CI-675603 - DSD EM CM 268 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Service Month and Service Year is any calendar month prior to the FLSAConfig:FlexibleHoursStartDate	Do not allow the action	Display the error message, "Flexible Hours Month and Year may not be before MONTH YYYY." MONTH YYYY = FLSAConfig:FlexibleHoursStartDate
269	20905	 CI-675604 - DSD EM CM 269 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Service Month and Service Year is for any calendar month prior to the FLSAConfig:FlexibleHoursStartDate	Do not allow the action	Display the error message, "Flexible Hours Month and Year may not be before MONTH YYYY." MONTH YYYY = FLSAConfig:FlexibleHoursStartDate

270	20905	CI-675605 - DSD EM CM 270 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND County Approved Hours are greater than the FLSAConfig:FlexibleHoursLimit	Do not allow the action	Display the error message, "Approved Flexible Hours may not exceed FLSAConfig:FlexibleHoursLimit." FLSAConfig:FlexibleHoursLimit = HHH:MM
271	20905	CI-675606 - DSD EM CM 271 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND County Approved Hours are greater than the FLSAConfig:FlexibleHoursLimit	Do not allow the action	Display the error message, "Approved Flexible Hours may not exceed FLSAConfig:FlexibleHoursLimit." FLSAConfig:FlexibleHoursLimit = HHH:MM
272	20905	CI-675607 - DSD EM CM 272 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Month and Year indicated is more than the FLSAConfig:FlexibleHoursBackDate before the current month	Do not allow the action	Display the error message, "Flexible Hours may not be requested more than [FLSAConfig:FlexibleHoursBackDate] month prior to the current month."
273	20905	CI-675608 - DSD EM CM 273 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Month and Year indicated is more than the FLSAConfig:FlexibleHoursBackDate before the current month AND the Outcome Letter Date is not populated	Do not allow the action	Display the error message, "Flexible Hours may not be requested more than [FLSAConfig:FlexibleHoursBackDate] month prior to the current month."
274	20905	CI-675609 - DSD EM CM 274 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the IHSS Auth to Purchase after Adjusted hours is 0:00 for the entire MONTH and YEAR indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until IHSS Hours are authorized for the Month and Year being requested."
275	20905	CI-675610 - DSD EM CM 275 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the IHSS Auth to Purchase after Adjusted hours is 0:00 for the entire MONTH and YEAR indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until IHSS Hours are authorized for the Month and Year being requested."
276	20905	CI-675611 - DSD EM CM 276 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Program Type is WPCS AND the approved WPCS Hours are 0:00 for the entire MONTH and YYYY indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until WPCS Hours are approved for the Month and Year being requested."
277	20905	CI-675612 - DSD EM CM 277 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Program Type is WPCS AND the approved WPCS Hours are 0:00 for the entire MONTH and YYYY indicated	Do not allow the action	Display the error message, "Flexible Hours request is not allowed until WPCS Hours are approved for the Month and Year being requested."
278	20905	CI-675613 - DSD EM CM 278 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the case is in Pending or Terminated Status for the entire Month and Year indicated	Do not allow the action	Display the error message, "Flexible Hours may not be added for a period when the recipient case is in Pending or Terminated Status."
279	20905	CI-675614 - DSD EM CM 279 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the case is in Pending or Terminated Status for the entire Month and Year indicated	Do not allow the action	Display the error message, "Flexible Hours may not be added for a period when the recipient case is in Pending or Terminated Status."
280	20905	CI-675615 - DSD EM CM 280 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Outcome is Approved AND the County Approved Hours is zero (0:00) or the field is blank	Do not allow the action	Display the error message, "Approved Flexible Hours must have County Approved Hours greater than 0:00."

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (281-300)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
281	20905	CI-675616 - DSD EM CM 281 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Outcome is Approved AND the County Approved Hours is zero (0:00) or the field is blank	Do not allow the action	Display the error message, "Approved Flexible Hours must have County Approved Hours greater than 0:00."
282	20905	CI-675617 - DSD EM CM 282 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Outcome is any of the Denied reasons AND the Recipient Requested Hours is zero (0:00) OR the County Approved Hours is greater than zero (0:00)	Do not allow the action	Display the error message, "Denied must have Recipient Requested Hours greater than 0:00 and County Approved Hours as 0:00."
283	20905	CI-675618 - DSD EM CM 283 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Outcome is any of the Denied reasons AND the Recipient Requested Hours is zero (0:00) OR the County Approved Hours is greater than zero (0:00)	Do not allow the action	Display the error message, "Denied must have Recipient Requested Hours greater than 0:00 and County Approved Hours as 0:00."
284	20905	CI-675619 - DSD EM CM 284 IMPLEMENTED	Inactivate Flexible Hours	When the Yes link is selected on the Inactive Recipient Flexible Hours screen AND the Program Type associated with the Flexible Hours record is IHSS AND user is not an IHSS user	Do not allow the action	Display the error message, "Action not allowed for a WPCS user when the Program Type is IHSS."
285	20905	CI-675620 - DSD EM CM 285 IMPLEMENTED	Inactivate Flexible Hours	When the Yes link is selected on the Inactive Recipient Flexible Hours screen AND the Program Type associated with the Flexible Hours record is WPCS AND user is not an WPCS user	Do not allow the action	Display the error message, "Action not allowed for an IHSS user when the Program Type is WPCS."
286	20905	CI-675621 - DSD EM CM 286 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND the Request Outcome Date is before the Recipient Request Date	Do not allow the action	Display the error message, "The Request Outcome Date may not be before the Recipient Request Date."
287	20905	CI-675622 - DSD EM CM 287 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Request Outcome Date is before the Recipient Request Date	Do not allow the action	Display the error message, "The Request Outcome Date may not be before the Recipient Request Date."
288	20905	CI-675623 - DSD EM CM 288 IMPLEMENTED	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND the Flexible Hours End Date is not the last day of a calendar month	Do not allow the action	Display the error message, "Flexible Hours End Date must be the last day of a calendar month."
289	20905	CI-675624 - DSD EM CM 289 IMPLEMENTED	Create Flexible Hours	When the Save link is selected on the Create Flexible Hours screen AND an Approved flexible hours segment already exists for the same MONTH YYYY	Do not allow the action	Display the error message, "An Approved Flexible Hours record already exists for this calendar month."

290	20905	CI-675625 - DSD EM CM 290 <small>IMPLEMENTED</small>	Modify Flexible Hours	When the Save link is selected on the Modify Flexible Hours screen AND an Approved flexible hours segment already exists for the same MONTH YYYY	Do not allow the action	Display the error message, "An Approved Flexible Hours record already exists for this calendar month."
291	20905	CI-675626 - DSD EM CM 291 <small>IMPLEMENTED</small>	Case Termination Pending Flexible Hours	When the Save link is selected on the Case Termination screen AND a Pending status Flexible Hours segment exists AND the MONTH YEAR indicated on the Flexible Hours segment is for a month prior to or in the same month as the Termination Authorization Start Date	Do not allow the action	Display the error message, "Case Termination may not occur when a Pending Flexible Hours segment exists. Please Approve, Deny or Inactivate the Flexible Hours record before terminating this case."
292	20905	CI-675672 - DSD EM CM 292 <small>IMPLEMENTED</small>	Create Flexible Hours Modify Flexible Hours	When the Save link is selected on the Create Flexible Hours or the Modify Flexible Hours screens AND the current Frequency is One-Time AND a Flexible Hours record exists with an End Date which is after the MONTH YEAR indicated for the current record	Do not allow the action	Display the error message, "Action not allowed when a Flexible Hours record exists with an End Date MM /DD/YYYY which is after MONTH YYYY]. Please Cancel this action and End Date the previous record before continuing." MM/DD/YYYY will be the End Date on the previous record. Month YYYY = Month YYYY indicated on the current record.
293	12445	CI-706210 - DSD EM CM 293 <small>IMPLEMENTED</small>	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's IHSS Required Forms will be generated in English only."
294	12445	CI-706211 - DSD EM CM 294 <small>IMPLEMENTED</small>	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's IHSS Required Forms is not available in the indicated Recipient's Written Language."
295	12445	CI-706212 - DSD EM CM 295 <small>IMPLEMENTED</small>	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The audio version of the Recipient's IHSS Required Forms will be generated in English only."
296	12445	CI-706213 - DSD EM CM 296 <small>IMPLEMENTED</small>	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Audio CD has been selected And The Recipient's written language is Cantonese, Mandarin or Armenian	Do not allow the action	Display the message: "The audio version of the Recipient's IHSS Required Forms is not available in the indicated Recipient's Written Language."
297	12445	CI-706214 - DSD EM CM 297 <small>IMPLEMENTED</small>	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required Forms will be generated in English only."
298			Removed with CR 1191			

299	12445	 CI-706216 - DSD EM CM 299 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Data CD has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Data CD version of the Recipient's IHSS Required Forms will be generated in English only."
300			Removed with CR 1191			

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (301-320)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
301	12455	CI-706218 - DSD EM CM 301 IMPLEMENTED	Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen And The IHSS Required Forms Option of Large Font has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Large Font version of the Recipient's IHSS Required Forms will be generated in English only."
302			Removed with CR 1191			
303	12455	CI-706220 - DSD EM CM 303 IMPLEMENTED	Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen And The IHSS Required Forms Option of Large Font has been selected And The Recipient's written language is other than English, Spanish, Cantonese, Mandarin and Armenian	Allow the action	Change the Save link to Continue and display the message: "The Large Font version of the Recipient's IHSS Required Forms will be generated in English only."
304			Removed with CR 1191			
305	16688	CI-718095 - DSD EM CM 305 IMPLEMENTED	Create Unannounced Home Visit Details	When the Save link is selected on the Create Unannounced Home Visit screen And the Visit Focus field indicates "Provider" and a Provider is selected And that provider is not active for the Home Visit Date	Do not allow the action	Display the error message, 'Action not allowed: Provider selected for visit focus not eligible on date of Initial Unannounced Home Visit.'
306	16688	CI-718096 - DSD EM CM 306 IMPLEMENTED	Create Unannounced Home Visit Details	When the Save link is selected on the Create Unannounced Home Visit screen And the Home Visit Date Time is on or after a terminated segment start date Or that date is on or before a terminated segment end date Or that date is on or after an leave segment start date Or that date is on or before a leave segment end date	Do not allow the action	Display the error message, 'Action not allowed: Recipient case not eligible on date of Initial Unannounced Home Visit.'
307	16688	CI-718097 - DSD EM CM 307 IMPLEMENTED	Create Follow-up Letter Entry	When the Save link is selected on the Create Follow-up Letter Entry screen And the Letter Mailed Date is on or before the Initial Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be on or before the Initial Unannounced Home Visit Date.'
308	16688	CI-718098 - DSD EM CM 308 IMPLEMENTED	Create Follow-up Letter Entry	When the Save link is selected on the Create Follow-up Letter Entry screen And the Letter Mailed Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be a future date.'
309	16688	CI-718099 - DSD EM CM 309 IMPLEMENTED	Create Follow-up Letter Entry	When the Save link is selected on the Create Follow-up Letter Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
310	16688	CI-718100 - DSD EM CM 310 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Letter Mailed Date is on or before the Initial Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be on or before the Initial Unannounced Home Visit Date.'

311	16688	CI-718101 - DSD EM CM 311 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Letter Mailed Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be a future date.'
312	16688	CI-718102 - DSD EM CM 312 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
313	16688	CI-718103 - DSD EM CM 313 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the date of entry is not equal current date And the Letter Mailed Date on the screen is not equal to the Letter Mailed Date on the database	Do not allow the action	Display the error message, 'Follow-up Letter Date may only be changed on the same day it was entered.'
314	16688	CI-718104 - DSD EM CM 314 IMPLEMENTED	Modify Follow-up Letter Entry	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Follow-up Letter Date is equal to or greater than the Follow-up Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be on or after the Follow-up Phone Call Date.'
315	16688	CI-718105 - DSD EM CM 315 IMPLEMENTED	Deleted Follow-up Letter Entry	When the delete link is selected on the Modify Follow-up Letter Entry screen And a Phone Call record exist	Do not allow the action	Display the error message, 'Action not allowed, the Follow-up Phone Call record must be deleted prior to the deletion of the Follow-up Letter record.'
316	16688	CI-718106 - DSD EM CM 316 IMPLEMENTED	Create Phone Call Entry – Follow-up	When the Save link is selected on the Create Phone Call Entry screen And the Letter Mailed Date has not been previously entered	Do not allow the action	Display the error message, 'Follow-up Letter required before Follow-up Phone Call Date can be entered.'
317	16688	CI-718107 - DSD EM CM 317 IMPLEMENTED	Create Phone Call Entry – Follow-up	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is on or before the Follow-up Letter Mailed Date	Do not allow the action	Display the error message, 'Follow-up Phone Call Date may not be the same as or before the Follow-up Letter Date.'
318	16688	CI-718108 - DSD EM CM 318 IMPLEMENTED	Create Phone Call Entry – Follow-up	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Phone Call Date may not be a future date.'
319	16688	CI-718109 - DSD EM CM 319 IMPLEMENTED	Create Phone Call Entry	When the Save link is selected on the Create Phone Call Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
320	16688	CI-718110 - DSD EM CM 320 IMPLEMENTED	Modify Phone Call Entry – Follow-up	When the Save link is selected on the Modify Phone Call Entry screen And the Letter Mailed Date is on or before the Initial Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Follow-up Phone Call Date may not be the same as or before the Follow-up Letter Date.'

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (321-340)

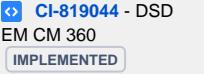
No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
321	16688	CI-718111 - DSD EM CM 321 IMPLEMENTED	Modify Phone Call Entry – Follow-up	When the Save link is selected on the Modify Follow-up Letter Entry screen And the Letter Mailed Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Letter Date may not be a future date.'
322	16688	CI-718112 - DSD EM CM 322 IMPLEMENTED	Modify Phone Call Entry	When the Save link is selected on the Modify Phone Call Entry screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
323	16688	CI-718113 - DSD EM CM 323 IMPLEMENTED	Modify Phone Call Entry – Follow-up	When the Save link is selected on the Modify Follow-up Phone Call Entry screen And the date of entry is not equal current date And the Follow-up Phone Call Date on the screen is not equal to the Follow-up Phone Call Date on the database	Do not allow the action	Display the error message, 'Follow-up Phone Call Date may only be changed on the same day it was entered.'
324	16688	CI-718114 - DSD EM CM 324 IMPLEMENTED	Modify Follow-up Phone Call Entry	When the Save link is selected on the Modify Follow-up Phone Call Entry screen And the Follow-up Phone Call Date is equal to or greater than the Follow-up UHV Date	Do not allow the action	Display the error message, 'Follow-up Phone Call date may not be on or after the Follow-up Unannounced Home Visit Date.'
325	16688	CI-718115 - DSD EM CM 325 IMPLEMENTED	Create Unannounced Home Visit – Follow-up	When the Save link is selected on the Create Unannounced Home Visit screen And the Phone Call Date has not been previously entered	Do not allow the action	Display the error message, 'Follow-up 'Follow-up Phone Call required before Follow-up Unannounced Home Visit Date Can be entered.'
326	16688	CI-718116 - DSD EM CM 326 IMPLEMENTED	Create Unannounced Home Visit – Follow-up	When the Save link is selected on the Create Unannounced Home Visit screen And the Follow-up Home Visit Date is on or before the Follow-up Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be the same as or before the Follow-up Phone Call Date.'
327	16688	CI-718117 - DSD EM CM 327 IMPLEMENTED	Create Unannounced Home Visit – Follow-up	When the Save link is selected on the Create Unannounced Home Visit screen And the Follow-up Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be a future date.'
328	16688	CI-718118 - DSD EM CM 328 IMPLEMENTED	Create Unannounced Home Visit	When the Save link is selected on the Create Unannounced Home Visit screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'
329	16688	CI-718119 - DSD EM CM 329 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the Follow-up Home Visit Date is on or before the Follow-up Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be the same as or before the Follow-up Phone Call Date.'
330	16688	CI-718120 - DSD EM CM 330 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the Follow-up Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may not be a future date.'
331	16688	CI-718121 - DSD EM CM 331 IMPLEMENTED	Modify Unannounced Home Visit	When the Save link is selected on the Modify Unannounced Home Visit screen And the comments field is not blank or contains a character other than (- ! # \$ % & ' * + / = ? ` { } ~ ^ - _ \ " < (>) : ; , [@])."	Do not allow the action	Display the error message, 'Comment field allows only English language alpha, numeric and special characters.'

332	16688	CI-718122 - DSD EM CM 332 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the date of entry is not equal current date And the Follow-up Home Visit Date on the screen is not equal to the Follow-up Home Visit Date on the database	Do not allow the action	Display the error message, 'Follow-up Unannounced Home Visit Date may only be changed on the same day it was entered.'
333	16688	CI-718123 - DSD EM CM 333 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the Follow-up Home Visit Date is equal to or greater than the Final Phone Call Date	Do not allow the action	Display the error message, 'Follow-up Phone Call date may not be on or after the Follow-up Unannounced Home Visit Date.'
334	16688	CI-718124 - DSD EM CM 334 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the user is attempting to change the Outcome From an unsuccessful Outcome of 'Entry Denied' or 'Uncooperative' or 'No Contact Made' or 'Not Available' To a successful Outcome of 'Completed' or 'Follow-up Required' or 'Fraud Referral' or Reassessment Required' And a Final Phone Call record exist	Do not allow the action	Display the error message, 'Final Phone call record must be inactivated before UHV outcome can be changed from an unsuccessful to successful.'
335	16688	CI-718125 - DSD EM CM 335 IMPLEMENTED	Modify Unannounced Home Visit – Follow-up	When the Save link is selected on the Modify Unannounced Home Visit screen And the user is attempting to change the Outcome From a successful Outcome of 'Completed' or 'Follow-up Required' or 'Fraud Referral' or Reassessment Required' To an unsuccessful Outcome of 'Entry Denied' or 'Uncooperative' or 'No Contact Made' or 'Not Available' And a Final UHV record exist	Do not allow the action	Display the error message, 'Follow-up UHV Outcome cannot be changed when Final UHV record exists'
336	16688	CI-718126 - DSD EM CM 336 IMPLEMENTED	Create Phone Call Entry – Final	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is on or before the Follow-up Home Visit Date	Do not allow the action	Display the error message, 'Final Phone Call date may not be on or after the Follow Unannounced Home Visit Date.'
337	16688	CI-718127 - DSD EM CM 337 IMPLEMENTED	Create Phone Call Entry – Final	When the Save link is selected on the Create Phone Call Entry screen And the Phone Call Date is greater than the current date	Do not allow the action	Display the error message, 'Final Phone Call Date may not be a future date.'
338	16688	CI-718128 - DSD EM CM 338 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the Final Phone Call Date is on or before the Follow-up Unannounced Home Visit Date	Do not allow the action	Display the error message, 'Final Phone Call Date may not be the same as or before the Follow-up Unannounced Home Visit Date.'
339	16688	CI-718129 - DSD EM CM 339 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the Final Phone Call Date is greater than the current date	Do not allow the action	Display the error message, 'Final Phone Call Date may not be a future date.'
340	16688	CI-718130 - DSD EM CM 340 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the date of entry is not equal current date And the Final Phone Call Date on the screen is not equal to the Final Phone Call Date on the database	Do not allow the action	Display the error message, 'Final Phone Call Date may only be changed on the same day it was entered.'

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (341-360)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
341	16688	CI-718131 - DSD EM CM 341 IMPLEMENTED	Modify Phone Call Entry – Final	When the Save link is selected on the Modify Phone Call Entry screen And the Final Phone Call Date is equal to or greater than the Final UHV Date	Do not allow the action	Display the error message, 'Final Phone call date may not be on or after the Final Unannounced Home Visit Date.'
342	16688	CI-718132 - DSD EM CM 342 IMPLEMENTED	Create Unannounced Home Visit – Final	When the Save link is selected on the Create Unannounced Home Visit screen And the Phone Call Date has not been previously entered	Do not allow the action	Display the error message, 'Final Phone Call required before Final Unannounced Home Visit Date Can be entered.'
343	16688	CI-718133 - DSD EM CM 343 IMPLEMENTED	Create Unannounced Home Visit – Final	When the Save link is selected on the Create Unannounced Home Visit screen And the Final Home Visit Date is on or before the Final Phone Call Date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be the same as or before the Final Phone Call Date.'
344	16688	CI-718134 - DSD EM CM 344 IMPLEMENTED	Create Unannounced Home Visit – Final	When the Save link is selected on the Create Unannounced Home Visit screen And the Final Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be a future date.'
345	16688	CI-718135 - DSD EM CM 345 IMPLEMENTED	Modify Unannounced Home Visit – Final	When the Save link is selected on the Modify Unannounced Home Visit screen And the Final Home Visit Date is on or before the Final Phone Call Date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be the same as or before the Final Phone Call Date.'
346	16688	CI-718136 - DSD EM CM 346 IMPLEMENTED	Modify Unannounced Home Visit – Final	When the Save link is selected on the Modify Unannounced Home Visit screen And the Final Home Visit Date is greater than the current date	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may not be a future date.'
347	16688	CI-718137 - DSD EM CM 347 IMPLEMENTED	Modify Unannounced Home Visit – Final	When the Save link is selected on the Modify Unannounced Home Visit screen And the date of entry is not equal current date And the Home Visit Date on the screen is not equal to the Home Visit Date on the database	Do not allow the action	Display the error message, 'Final Unannounced Home Visit Date may only be changed on the same day it was entered.'
348	16688	CI-719709 - DSD EM CM 348 IMPLEMENTED	Terminate Case	When the Save link on the Terminate Case screen is selected And the Termination Reason "Non-compliance - UHV" is indicated And the most recent UHV record is not a Final UHV record in unsuccessful status.	Do not allow the action	Display the error message, 'Action not allowed: Final Unannounced Home Visit record not in an 'Unsuccessful' Status or does not exist.'
349		CI-753342 - DSD EM CM 349 CANCELLED	Cancelled by CR115			
350	16878	CI-775216 - DSD EM CM 350 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Termination Reason is "Health Care Certification – No Need" AND the Health Care Certification screen has a Health Care Certification Type indication other than "No Need"	Do not allow the action	Display the error message, "Invalid Termination Reason when "Health Care Certification Type is [Health Care Certification Type]."

351	16878	CI-775217 - DSD EM CM 351 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Termination Reason is "Health Care Certification – Not Received" AND the current date is before either the Health Care Certification Due Date or, if indicated, Good Cause Extension Due Date	Do not allow the action	Display the error message, "Case may not be terminated for "Health Care Certification – Not Received, before the Health Care Certification Due Date."
352	20734	CI-775278 - DSD EM CM 352 IMPLEMENTED	Create Recipient Workweek Agreement OR Modify Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement AND the Total Hours field is 00:00 AND the Back-Up Provider is not selected	Do not allow the action.	Display the error message "When Total Hours is 00:00, Back-Up Provider must be selected. If this provider is not a back-up provider, please update the Time Entries as needed."
353	20734	CI-775279 - DSD EM CM 353 IMPLEMENTED	Create Recipient Workweek Agreement OR Modify Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement AND the Total Hours field is other 00:00 AND the Back-Up Provider is selected	Do not allow the action.	Display the error message "When Back-Up Provider is indicated the Total Hours must be 00:00. If this provider is not a back-up provider, please update the Time Entries as needed."
354	20734	CI-775280 - DSD EM CM 354 IMPLEMENTED	Create Recipient Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement AND the provider being added as the Back-Up ¹ has an "Active" status Provider Hours segment for the period as of the Recipient Workweek Agreement Begin Date AND the Back-Up Provider is selected	Do not allow the action.	Display the error message "Active Status Provider may not be indicated as Back-up."
355	20734	CI-775281 - DSD EM CM 355 IMPLEMENTED	Create Workweek Agreement	When the Save link is selected on the Create Recipient Workweek Agreement pop-up AND the recipient case status is Terminated on or after the Recipient Workweek Agreement Begin Date	Do not allow the action	Display the error message, "Recipient Workweek Agreement not allowed for a period when case status is Terminated."
356	16025	CI-818676 - DSD EM CM 356 IMPLEMENTED	Rescind Case	When an attempt is made to save a Rescind Case screen AND the Person Home Reported Date of Death is not blank field is not blank AND the Person Home Death Outcome is Pending	Do not allow the action	The data in this screen will not be saved and the following error messages displays, "Action not allowed when Person Home indicates Reported Date of Death and the Death Outcome is Pending."
357	16025	CI-818677 - DSD EM CM 357 IMPLEMENTED	Reactivate Case	When the Save link is selected on the Reactivate Case screen AND the Person Home Reported Date of Death is not blank field is not blank AND the Person Home Death Outcome is Pending	Do not allow the action	Display the Error Message "Action not allowed when Person Home indicates Reported Date of Death and the Death Outcome is Pending."
358	21133	CI-819042 - DSD EM CM 358 IMPLEMENTED	Modify Timesheet Communication Preferences	The Modify Timesheet Communication Preferences Pop-up screen is saved AND The recipient is a registered user of TTS or ESP or both AND The Communication Preferences selection is left blank.	Do not allow the action	Display the error message, "Communication Preferences' must be entered."
359	21133	CI-819043 - DSD EM CM 359 IMPLEMENTED	Modify Timesheet Communication Preferences	The Modify Timesheet Communication Preferences Pop-up screen is saved AND The recipient is not a registered user of ESP AND Email is the selected Communication Preference.	Do not allow the action	Display the error message, "Recipient must be an ESP user to select this preference."

360	21133	 <p>CI-819044 - DSD EM CM 360 IMPLEMENTED</p>	<p>Modify Timesheet Communication Preferences</p>	<p>The Modify Timesheet Communication Preferences Pop-up screen is saved AND The recipient is not a registered user of TTS AND Telephone is the selected Communication Preference.</p>	<p>Do not allow the action</p>	<p>Display the error message, "Recipient must be a TTS user to select this preference."</p>
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DSD 25/Recip CM & OS – Case Maintenance/Error Messages (361-380)

No	R e q ID	CI	Screen Name or User Action	Condition	Action	Error Message
3 61	2 1 1 34	➡ CI-819049 - DSD EM CM 361 IMPLEMENTED	Reset Recipient TTS Passcode Pop-up with a non-4-digit number	The Reset Recipient TTS Passcode Pop-up screen is saved AND Either the New Passcode or Confirm Passcode field does not contain a 4 digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"
3 62	2 1 1 34	➡ CI-819050 - DSD EM CM 362 IMPLEMENTED	Reset Recipient TTS Passcode Pop-up mismatched fields	The Reset Recipient TTS Passcode Pop-up screen is saved AND Both the New Passcode and Confirm Passcode fields contain a 4 digit number, but the 4 digit numbers do not match across both fields.	Do not allow the action	Display the error message, "Fields must match"
3 63	2 1 1 34	➡ CI-819064 - DSD EM CM 363 IMPLEMENTED	Reset Provider TTS Passcode Pop-up with a non-4-digit number	The Reset Provider TTS Passcode Pop-up screen is saved AND Either the New Passcode or Confirm Passcode fields do not contain a 4-digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"
3 64	2 1 1 34	➡ CI-819065 - DSD EM CM 364 IMPLEMENTED	Reset Provider TTS Passcode Pop-up mismatched fields	The Reset Provider TTS Passcode Pop-up screen is saved AND Both the New Passcode and Confirm Passcode fields contain a 4-digit number, but the 4-digit numbers do not match.	Do not allow the action	Display the error message, "Fields must match"
3 65	2 1 1 34	➡ CI-822185 - DSD EM CM 365 IMPLEMENTED	Register Recipient for TTS Pop-up - Inputting a non-4-digit number	The Register Recipient for TTS Pop-up screen is saved AND Either the Passcode or Confirm Passcode field does not contain a 4 digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"
3 66	2 1 1 34	➡ CI-822186 - DSD EM CM 366 IMPLEMENTED	Register Recipient for TTS Pop-up - Mismatched fields	The Register Recipient for TTS Pop-up screen is saved AND Both the Passcode and Confirm Passcode fields contain a 4 digit number, but the 4 digit numbers do not match across both fields.	Do not allow the action	Display the error message, "Fields must match"
3 67	2 1 1 34	➡ CI-819069 - DSD EM CM 367 IMPLEMENTED	Register Recipient for TTS Pop-up - No Recorded Telephone Number	The Register Recipient for TTS Pop-up screen is saved AND The Recipient does not have a primary telephone number listed in CMIPS	Do not allow the action	Display the error message, "Recipient must have a primary telephone number in CMIPS to use the TTS."
3 68	2 1 1 34	➡ CI-822286 - DSD EM CM 368 IMPLEMENTED	Register Provider for TTS Pop-up - Inputting a non-4-digit number	The Register Provider for TTS Pop-up screen is saved AND Either the Passcode or Confirm Passcode field does not contain a 4 digit number.	Do not allow the action	Display the error message, "Passcode must be a 4 digit number"

3 69	2 1 1 34	CI-822287 - DSD EM CM 369 IMPLEMENTED	Register Provider for TTS Pop-up - Mismatched fields	The Register Provider for TTS Pop-up screen is saved AND Both the Passcode and Confirm Passcode fields contain a 4 digit number, but the 4 digit numbers do not match across both fields.	Do not allow the action	Display the error message, "Fields must match"
3 70	2 1 0 05	CI-822339 - DSD EM CM 370 IMPLEMENTED	Modify Timesheet Accommodations pop-up – Advance Pay – Large Font	When the Save link is selected on the Modify Timesheet Accommodations pop-up AND The Accommodation of Large Font Timesheet has been selected AND The Recipient is designated to receive Advance Payments	Do not allow the action	Display the message: "The Timesheet Accommodation of Large Font Timesheet is not allowed for the Recipients designated to receive Advance Payments."
3 71		CI-822340 - DSD EM CM 371 CANCELLED	Cancelled by ASR Sprint 25 Team 1&2			
3 72	2 1 1 53	CI-822428 - DSD EM CM 372 IMPLEMENTED	Modify Timesheet Accommodation Pop-up	When a county user selects save button on the Modify Timesheet Accommodations pop-up AND The value selected is "Press or Say" AND The Recipient's Spoken Language is not English or Spanish	Allow the action	Display the informational message, "Recipient's spoken language is not supported by Press or Say TTS. Calls to this recipient will be made in English."
3 73		Reserved for CR 223 (CR is cancelled)				
3 74		CI-822496 - DSD EM CM 374 IMPLEMENTED	Upload Case Attachments	User selects a file to upload AND Selects a form from the dropdown, where form already exists for that case (with the exception of SOC 426A, SOC 839, SOC 321, SOC 839A, SOC 838, and SOC 450) AND Selects Save Action	Do not allow the action	The file is not uploaded and the following message displays: "This form already exists on Case Attachments Screen; Uploading multiple copies of this form is not allowed. To upload the form, existing form must be archived from the Case Attachments Screen."
3 75	2 1 1 75	CI-822497 - DSD EM CM 375 IMPLEMENTED	Upload Case Attachments	Save Action is selected to upload an attachment and the attachment's size exceeds 5 MB.	Do not allow the action	The attachment is not uploaded and the following message displays: "File exceeds size limitation of 5 MB."
3 76	2 1 1 75	CI-822498 - DSD EM CM 376 IMPLEMENTED	Upload Case Attachments	Save Action is selected to upload an attachment and the attachment's file type is not one of the following: PDF, DOC, DOCX, TIF, TIFF, GIF, BMP, PNG, JPG, and JPEG.	Do not allow the action	The attachment is not uploaded and the following message displays: "File type is not supported. Supported file types are PDF, DOC, DOCX, TIF, TIFF, GIF, BMP, PNG, JPG, and JPEG."

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (381-400)

No	R e q ID	CI	Screen Name or User Action	Condition	Action	Error Message
3 81		Reserved for CR-170 - SSR				
3 82		Reserved for CR-170 - SSR				
3 83		Reserved for CR-170 - SSR				
3 84		Reserved for CR-170 - SSR				
3 85		Reserved for CR-170 - SSR				
3 86		Reserved for CR-223 - SSR				
3 87	2 1 2 28	➡ CI-822780 - DSD EM CM 387 IMPLEMENTED	Confirm EVV Exception for Recipient - Pending EVV Timesheets	When a county user selects yes button on the Confirm EVV Exception for Recipient Pop-up AND There are IHSS/WPCS timesheets in Pending Recipient Electronic Review status	Allow the action	Display the informational message, "One or more timesheets have been sent to your CMIPS printer. Please mail the printed timesheet(s) to the recipient for review."
3 88	2 1 2 28	➡ CI-822782 - DSD EM CM 388 IMPLEMENTED	EVV Exception Error Message	When a county user selects the "Yes" button on the Confirm EVV Exception for Recipient Pop-up AND The Recipient is registered for either the ESP or TTS AND This confirmation message is not already present	Do not allow the action	Display the confirmation message, "This recipient is currently registered for an electronic method. Are you sure you want to approve an EVV Exception." The user must select either "Yes" a second time to confirm the action and allow the EVV Exception to be entered or "No" to cancel the action.
3 89	2 1 3 20	➡ CI-823138 - DSD EM CM 389 IMPLEMENTED	Modify Notification Communication Preference - No phone number on file	When a county user selects 'Text Messages' or 'Both Text Messages and Email' AND Selects the Save button AND There is no cell phone number on file	Do not allow the action	Display the warning message, "A cell phone number must be set up for the Recipient to select this preference."
3 90	2 1 3 20	➡ CI-823139 - DSD EM CM 390 IMPLEMENTED	Modify Notification Communication Preference - Cell phone number listed but not verified	When a county user selects 'Text Messages' or 'Both Text Messages and Email' AND Selects the Save button AND The cell phone number has not been verified	Do not allow the action	Display the warning message, "The cell phone number must be verified for the Recipient to select this preference."

3 91	2 1 3 20	CI-823140 - DSD EM CM 391 IMPLEMENTED	Modify Notification Communication Preference - Recipient is not registered with ESP	When a county user selects 'Email', 'Text Messages' or 'Both Text Messages and Email' AND Selects the Save button AND Recipient is not registered with ESP	Do not allow the action	Display the warning message "Cannot set up notification preference because the Recipient is not registered with ESP."
3 92		CI-823141 - DSD EM CM 392 CANCELLED	Cancelled by SCF-91			
3 93	2 1 3 20	CI-823142 - DSD EM CM 393 IMPLEMENTED	Verify Cell Phone Number - Invalid Verification Code	When a county user enters an invalid Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message "Invalid verification code, please enter a valid verification code."
3 94	2 1 3 20	CI-823143 - DSD EM CM 394 IMPLEMENTED	Verify Cell Phone Number - Expired Verification Code	When a county user enters an expired Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message "Verification code expired, please select "Resend Code" to receive a new one."
3 95	2 1 3 20	CI-823144 - DSD EM CM 395 IMPLEMENTED	Verify Cell Phone Number - Blocked Verification Code	When a county user enters a blocked Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message "The verification code is blocked since you've entered an incorrect verification code more than 5 times. Please select "Resend Code" to receive a new one."
3 96		Reserved for ASR Sprint 24 Team CM & AS				
3 97	2 1 1 75	CI-823386 - DSD EM CM 397 IMPLEMENTED	Upload Case Attachments - S3 is down	When the user selects a file to upload AND S3 is down AND Selects Save Action	Do not allow the action	Display the warning message "There was an issue uploading the file, please try again later."
3 98	2 1 1 75	CI-823644 - DSD EM CM 398 IMPLEMENTED	Restore Attachment associated to Case	User selects the 'Restore' action AND There is already a document of that type in 'Uploaded' status AND Multiple copies of the document is NOT allowed	Do not allow the action	Display the error message: "This form already exists on Provider Attachments Screen; multiple current copies of this form is not allowed. To restore this form, the existing form must be archived from the Provider Attachments Screen."
3 99	1 2 1 63 1 2 1 83	CI-823734 - DSD EM CM 399 IMPLEMENTED	Create Inter-County Transfer, Modify Inter-County Transfer	When the user clicks the Save button on the Create Inter-County Transfer or Modify Inter-County Transfer screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
4 00	2 1 3 78	CI-823755 - DSD EM CM 400 IMPLEMENTED	Send Electronic Form to CSP Pop-Up	When the user selects the Send button on the Send Electronic Form to CSP Pop-Up screen AND The assigned worker does not have 2FA credentials	Do not allow the action	Display the error message, "Assigned Worker has not setup their CSP Two-Step Authentication Information."

DSD 25/Recip CM & OS – Case Maintenance/Error Messages (401-420)

No	R e q ID	CI	Screen Name or User Action	Condition	Action	Error Message
4 01	2 1 3 78	➡ CI-823756 - DSD EM CM 401 IMPLEMENTED	Send Electronic Form to CSP - Assigned Worker blank	When the user selects the Send button on the Send Electronic Form to CSP Pop-Up screen AND The Assigned Worker field is blank	Do not allow the action	Display the error message, "Assigned Worker is required when CMIPS Services Portal is selected."
4 02	2 1 3 78	➡ CI-823807 - DSD EM CM 402 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The date entered in the From Date field not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'From Date' is not valid. A date must be in the format 'MM/DD/YYYY', you have entered '<input>'."
4 03	2 1 3 78	➡ CI-823808 - DSD EM CM 403 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The date entered in the To Date field not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'To Date' is not valid. A date must be in the format 'MM/DD/YYYY', you have entered '<input>'."
4 04	2 1 3 78	➡ CI-823809 - DSD EM CM 404 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The entry in the To Date field is earlier than the entry in the From Date field	Do not allow the action	Display the error message, "To Date must be on or after the From Date."
4 05	2 1 3 78	➡ CI-823810 - DSD EM CM 405 IMPLEMENTED	Completed Electronic Forms	When the user selects the Search button AND The entries in the From Date and To Date fields are greater than one year apart.	Do not allow the action	Display the error message, "Search is limited to one year."
4 06	2 0 7 65 2 0 7 96 2 1 1 53	➡ CI-823934 - DSD EM CM 406 IMPLEMENTED	Modify Recipient Timesheet Accommodations	The Modify Recipient Timesheet Accommodations Pop-up screen is saved And The selected Timesheet Accommodation preference is 'Press or Say' And The Recipient is not registered for TTS	Do not allow the action	Display the error message, "Recipient must be registered for TTS to select Press or Say."
4 07	2 1 3 20 2 1 3 25	➡ CI-823973 - DSD EM CM 407 IMPLEMENTED	Verify Cell Phone Number - Invalid Phone Number	When a county user enters a Verification Code and the Phone Number is invalid AND Selects the Verify button	Do not allow the action	Display the warning message "Not a valid phone number. Please enter valid phone number."
4 08	2 1 3 78	➡ CI-823981 - DSD EM CM 408 IMPLEMENTED	Send Electronic Form to ESP - Recipient not registered with ESP	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The recipient is not registered with ESP	Do not allow the action	Display the error message, "Recipient is not registered with ESP."

4	09	2 1 3 78	CI-823982 - DSD EM CM 409 IMPLEMENTED	Send Electronic Form to ESP - Action Date format	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The Action Date entered is not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'Action Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<user entry>'."
4	10	2 1 3 78	CI-823983 - DSD EM CM 410 IMPLEMENTED	Send Electronic Form to ESP - Action Date blank	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The Action Date field is blank	Do not allow the action	Display the error message, "Action Date' must be entered."
4	11	2 1 3 78	CI-823984 - DSD EM CM 411 IMPLEMENTED	Send Electronic Form to ESP - Action Date is a past date	When the Save button is selected on the Send Electronic Form to ESP Pop-Up AND The Action Date entered is a past date	Do not allow the action	Display the error message, "Action Date field cannot be a past date."
4	12	2 1 3 78	CI-824204 - DSD EM CM 412 IMPLEMENTED	Create Form Pop-Up - Non ESP Form	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND One Non-ESP available form is selected	Do not allow the action	Display the error message, "<FORM long name> can't be sent to ESP"
4	13	2 1 3 78	CI-824205 - DSD EM CM 413 IMPLEMENTED	Create Form Pop-Up - More than one Form	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND More than one form is selected	Do not allow the action	Display the error message, "Only one form can be sent to ESP at a time"
4	14	2 1 3 78	CI-824206 - DSD EM CM 414 IMPLEMENTED	Create Form Pop-Up - Not Registered with ESP	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The Recipient is not registered with ESP	Do not allow the action	Display the error message, "Recipient not registered with ESP"
4	15	2 1 3 78	CI-824207 - DSD EM CM 415 IMPLEMENTED	Create Form Pop-Up - Incorrect Date Format	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The entered date in the Electronic Form Due Date field is not in the format MM/DD/YYYY	Do not allow the action	Display the error message, "The field Electronic Form Due Date is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<user entry>'."
4	16	2 1 3 78	CI-824208 - DSD EM CM 416 IMPLEMENTED	Create Form Pop-Up - Due Date is Blank	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The Electronic Form Due Date field is blank	Do not allow the action	Display the error message, "Electronic Form Due Date must be entered."
4	17	2 1 3 78	CI-824209 - DSD EM CM 417 IMPLEMENTED	Create Form Pop-Up - Due Date Past Due	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is selected AND The Electronic Form Due Date field is a past date	Do not allow the action	Display the error message, "Electronic Form Due Date field cannot be a past date."
4	18	2 1 3 78	CI-824210 - DSD EM CM 418 IMPLEMENTED	Create Form Pop-Up - Due Date Only Allowed When Sending to ESP	When the Save button is selected on the Create Form Pop-Up AND The 'Send Electronic Copy to ESP' print option is not selected AND The Electronic Form Due Date field has a future date	Do not allow the action	Display the error message, "Electronic Form Due Date only allowed when sending to ESP"

4	2	 CI-824352 - DSD EM CM 419 IMPLEMENTED	Create Form Pop-Up - SOC 873 & SOC 874/ SOC 873L & SOC 874L	When the Save button is selected on the Create Form Pop-Up AND The "Send Electronic Copy to ESP" print option is selected AND The user selected either SOC 873 or SOC 873/874 AND The user entered an Electronic Form Due Date	Do not allow the action	Display the error message, "Electronic Form Due Date may not be entered for the SOC 873/SOC 874. The Due Date for the SOC 873 & 874 will be calculated automatically."
19	1					

DSD 25/Recip CM & OS – Case Maintenance/Business Rules

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance

This section describes the business rules associated with the application screens and actions.

- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (1-10)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (11-20)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (21-30)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (31-40)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (41-50)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (51-60)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (61-70)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (71-80)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (81-90)
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- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (221-230)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (231-240)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (241-250)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (251-260)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (261-270)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (271-280)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (281-290)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (291-300)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (301-310)
- DSD 25/Recip CM & OS – Case Maintenance/Business Rules/Case Maintenance (311-320)

No	Req ID	CI	Description	When	Action
1	12164	 CI-111210 - DSD BR CM 01 IMPLEMENTED	Track "Case Pending Inter-County Transfer" Status	When a Create Inter-County Transfer screen is saved.	Set the Inter-County Transfer status to "In-Progress". AND IF The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month ALSO Send S9 to SAWS Sending County with "IP" status.
2	16181	 CI-111211 - DSD BR CM 02 IMPLEMENTED	Cancel Inter-County Transfer Action	When a user in the Sending County selects the Yes link on the Cancel Transfer Request screen. Note: The receiving county is not able to cancel an in-progress ICT	Update the Inter-County Transfer status to "Cancelled". Trigger the applicable Task "[case name] [case number] Inter-County Transfer Cancelled" (DSD Section 30.6 #23) AND IF The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month ALSO Send S9 to SAWS Receiving County with "CX" status.

3	12178	CI-111212 - DSD BR CM 03 IMPLEMENTED	Cancel Inter-County Transfer on Case Termination.	When a Recipient case with an Inter-County Transfer status of In-Progress is Terminated.	Update the Inter-County Transfer status to Cancelled. AND IF The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month ALSO Send S9 to SAWS Sending County that with "CX" status. Note: The rules for termination will be followed and an S8 with a terminated status will be sent to SAWS.
4	12187	CI-111213 - DSD BR CM 04 IMPLEMENTED	Update State Hearing Status	When Create State Hearing is saved.	Set the State Hearing status to "Requested".
5	12187	CI-111214 - DSD BR CM 05 IMPLEMENTED	Update State Hearing Status	When a Create State Hearing screen is saved and the scheduled hearing date field is not blank.	Set the State Hearing status to Scheduled.
6	12187	CI-111215 - DSD BR CM 06 IMPLEMENTED	Update State Hearing Status	When a Modify State Hearing screen is saved and the Scheduled Hearing Date field is not blank.	Set the State Hearing status to "Scheduled".
6a	12187	CI-111216 - DSD BR CM 06a IMPLEMENTED	Update State Hearing Status	When a Modify State Hearing screen is saved and an outcome other than Pending is indicated with an Outcome Date.	Set the State Hearing status to Resolved Set all fields except Compliance Form Sent Date to be non-editable
7	12492	CI-111217 - DSD BR CM 07 IMPLEMENTED	Update Homemaker Timesheet Status	When Homemaker Timesheet Details entry is saved.	Set the Timesheet status to "Not Submitted".
8	12492	CI-111218 - DSD BR CM 08 IMPLEMENTED	Update Homemaker Timesheet Status	When the Submit link is selected from the Submit for Approval Homemaker Timesheet screen.	Set the Homemaker Timesheet status to "Submitted" for the indicated Homemaker Timesheets.
9	12492	CI-111219 - DSD BR CM 09 IMPLEMENTED	Update Homemaker Timesheet Status	When the Approve link associated with a specific record is selected from the View Homemaker Timesheet screen.	Set the Homemaker Timesheet Status for that record to "Approved".
10	12492	CI-111220 - DSD BR CM 10 IMPLEMENTED	Update Homemaker Timesheet Status	When the Reject link is selected from the Reject Homemaker Timesheet screen.	Set the Homemaker Timesheet status for the record to Rejected.

No	Req ID	CI	Description	When	Action
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11	12257 16657 20734	CI-111221 - DSD BR CM 11 IMPLEMENTED	Terminate Case	When Terminate Case screen is saved.	<ul style="list-style-type: none"> • Set the Active Evidence Authorization End Date to the Terminate Case Authorization End Date • System builds prorated service month when appropriate • Set the Recipient Case status to Terminated • Set the related Active or On Leave status Individual Provider records to Terminated • Set the related Individual Provider Termination Reason to Recipient Not Eligible • Set the related Individual Provider Leave/Terminate Provider Effective Date to Terminate Case Authorization End Date • If a WPCS hours record exists for the indicated time period, set the WPCS End Date to the Terminate Case Authorization End Date. (WPCS Hours will not be prorated) • Send a notification to the WPCS Worker indicating WPCS hours terminated and IHSS Recipient case termination • If a Workplace Hours record exists for the indicated time period, set the Workplace Hours End Date to the Terminate Case Authorization End Date (workplace hours will not be prorated) • Send a IH40 notification the MEDS of termination • End Date Provider Workweek Agreement • End Date all Recipient Workweek Agreement, regardless Provider Status • Recalculate Monthly Overtime Maximum • Recalculate Provider and Recipient Weekly Maximum • Update Number of Active Cases • Update Number of Active Providers <p>AND IF</p> <p>The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month</p> <p>ALSO</p> <ul style="list-style-type: none"> • Send a S8 notification to SAWS of termination
12	16658 16941 20734 20735	CI-111222 - DSD BR CM 12 IMPLEMENTED	Leave Case	When Leave Case screen is saved.	<ul style="list-style-type: none"> • Set the Active Evidence Authorization End Date to the Leave Case Authorization End Date • Set the case status to Leave • System builds prorated service month when appropriate • Set the related Active status Individual Provider to On Leave • Set the related Individual Provider Leave/Terminate Provider Effective Date to Leave Case Authorization End Date • If a Workplace hours record exists for the indicated time period, set the Workplace Hours End Date to the Leave Case Authorization End Date (Workplace hours will not be prorated) • End Date Provider Workweek Agreement • End Date all Recipient Workweek Agreement regardless of Provider Status • Recalculate Monthly Overtime Maximum • Recalculate Provider and Recipient Weekly Maximum • Update Number of Active Cases • Update Number of Active Providers <p>AND IF</p> <ul style="list-style-type: none"> • The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month <p>ALSO</p> <ul style="list-style-type: none"> • Send S8 to SAWS with a leave status
14	16880 16110 16111 16912 16112 16115	CI-111223 - DSD BR CM 14 IMPLEMENTED	New Application - Reactivate Case	When Reactivate Case screen is saved.	<p>When the Reactivate Case screen is saved:</p> <ul style="list-style-type: none"> • Set the Referral Date to the current date or user entered date • Set the Application Date to the current date or user entered date • Set the Medi-Cal Eligibility Referral Date to blank • Set Medi-Cal Initial eligibility Notification Date to blank • Display Assign Worker list based upon the County associated with the User taking the action • Set County to the County associated with the Assigned Worker • Set the District Office to the District Office associated with the Assigned Worker • Set all Health Care Certification fields to blank • Inactivate prior Disaster Preparedness record • An IH18 will be sent to MEDS when a case is reactivated <p>AND IF DURING SCI CLEARANCE</p> <ul style="list-style-type: none"> • A match is found, and the Medi-Cal eligibility status is eligible and the Medi-Cal Aid Code is 10, 20, or 60 then complete the action. <p>ELSE IF DURING SCI CLEARANCE</p> <ul style="list-style-type: none"> • A match is found, and the Medi-Cal eligibility status is eligible and the Medi-Cal Aid Code is other than 10, 20, or 60 then an S8 with "Pending" status will be sent to SAWS. <p>OR IF</p> <ul style="list-style-type: none"> • During SCI clearance, a match is found, and the Medi-Cal eligibility status is not eligible then an S1 will be sent to SAWS.

15	12469 1 2772	CI-111224 - DSD BR CM 15 IMPLEMENTED	View Form	When the status of a form or correspondence is Pending.	The Form Name will not display in the View Form and Form Name fields
16	16464	CI-111225 - DSD BR CM 16 IMPLEMENTED	Modify or Inactivate Form	When a Modify or Inactivate Form screen is saved and the status is Pending and Mark As Inactivate /Not Mailed is indicated.	Set the Form status to Inactivated
17	12469	CI-111226 - DSD BR CM 17 IMPLEMENTED	Modify or Inactivate Form	When a Modify or Inactivate Form screen is saved and the status is Printed and Mark As Inactivate/Not Mailed is indicated.	Set the Form status to Not Mailed
18	11948	CI-111227 - DSD BR CM 18 IMPLEMENTED	Activate Evidence (Final Determination)	When case evidence is activated and the Case status changes from Leave to Eligible or Presumptively Eligible and a Resource Suspension End Date is indicated.	Set the Resource Suspension End Date to blank
19a	12465	CI-111229 - DSD BR CM 19a IMPLEMENTED	County Contractor Invoice Exception Processing	Identifies and reports the following Recipient case exceptions associated with a County Contractor Billing Invoice submission.	<p>Recipient case not found – The IHSS case number submitted does not match a valid IHSS case number</p> <p>When a Billing Invoice File has any erroneous data the entire file rejects from processing. Because there are no records processed there will be no report produced.</p> <p>Invalid SSN – The SSN submitted does not match the IHSS Recipient SSN in CMIPS (Match against Alternative ID Type Social Security Number if present or Alternative ID Type Conversion Duplicate)</p> <p>Incorrect Recipient Name – The Recipient name associated with the case number does not match CMIPS data</p> <p>Recipient Not Eligible – The IHSS Recipient case is not allocated County Contractor Hours for the service month submitted</p> <p>Incorrect CC Rate Submitted – The rate submitted for the service period does not match the County Contractor Pay Rate for the service period</p> <p>SOC Collected Recipient Case Not Found – The IHSS Case Number submitted is Share of Cost and either the SOC Obligated Date or SOC Obligated Amount is missing</p> <p>Contractor not eligible for Service Month – For the period submitted the County Contractor did not have a Contract with the County</p> <p>Invalid Service Period – Service Period submitted is not valid for the Contractor</p> <p>Invalid Service Month – Contractor billing include "future" billing</p> <p>SOC Already Collected \$XX.XX - SOC amount already deducted from a prior payment – Contractor should reimburse indicated SOC Amount to the Recipient.</p>
19b	16194 1 6250	CI-111228 - DSD BR CM 19b IMPLEMENTED	County Contractor Invoice Processing	Processes, determines and reports the following details associated with each County Contractor Billing Invoice submission against the invoice and Recipient case.	<p>Invoice Details</p> <ul style="list-style-type: none"> • Invoice # - From Billing Invoice • Invoice Date - From Billing Invoice • Processed Date - The date the invoice was processed in CMIPS • Billing Month - From Invoice Submission • Original Amount - The total dollar amount associated with the Recipient records submitted for the billing month (Hours x Rate) from invoice details • Rejected Amount - The sum dollars (Hours x Rate) associated with each Exception Record • Cut Back Amount - The sum of the Cutback Amounts from those records not reported as Exceptions • SOC Collected Amount - The sum of the SOC Collected Amounts from those records not reported as Exceptions • Authorized Amount - (The Original – Rejected Amount – Cut Back Amount – SOC Collected Amount) • Set County Contractor Billing Invoice Record status to Pending <p>Payment Details</p> <ul style="list-style-type: none"> • Case Count – Count of Recipient records paid in the billing month associated with a particular service month and funding source • Amount – The aggregated amount paid by the IHSS program related a funding source and service month

20	16050	CI-111230 - DSD BR CM 20 IMPLEMENTED	MEDS Daily Receive	<p>When an update to the Medi-Cal eligibility information for the IHSS Recipient case is received via MEDS Daily receive file.</p> <p>AND</p> <p>the CIN on the MEDS Daily Receive record equals the most current CIN found in CMIPS</p>	<p>If initial Medi-Cal eligibility is received for a Recipient, populate Medi-Cal Determination Date</p> <p>If monthly record does not exist for Recipient, add Eligibility Month record and populate Medi-Cal eligibility data in CMIPS</p> <p>If monthly record exists apply update(s) in CMIPS</p> <p>If Medi-Cal Eligibility Status or FFP changes, call the Authorization to update the funding source based on the new Medi-Cal Eligibility. Call Authorization process creates new evidence and authorizes the evidence.</p> <p>If a Recipient, in which termination was rescinded, has record(s) on the Medi-Cal Daily Receive (CMDR103B) batch interface file, the batch creates an SOC hours trigger record for each service month up to the month in which the termination was rescinded that indicates the Recipient has an uncertified Medi-Cal share of cost (Eligibility Status Code begins with a '5').</p> <ul style="list-style-type: none"> The service month has to be in a month that is ON or AFTER CONFIGURATION.SOCCutOffDate. The service month has to be within 12 months PRIOR to the current month. If the service month is beyond 12 months from the current month then the batch will not write a trigger for that month.
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No	Req ID	CI	Description	When	Action
21	12027	CI-111231 - DSD BR CM 21 IMPLEMENTED	MEDS Monthly Renewal	<p>When Medi-Cal eligibility for the future month is received via MEDS Monthly Renewal Receive file.</p> <p>AND</p> <p>the CIN on the MEDS Monthly Renewal Receive record equals the most current CIN found in CMIPS</p>	<p>If initial Medi-Cal eligibility is received for a Recipient, populate Medi-Cal Determination Date</p> <p>Populate the Medi-Cal eligibility for the future months in CMIPS</p> <p>If Medi-Cal Eligibility Status or FFP is not the same as previous Eligibility month call the Authorization to update the funding source based on the new Medi-Cal Eligibility for the future month. Call Authorization process creates new evidence and authorizes the evidence.</p> <p>Create triggers for all Recipients in Eligible status where the MediCal Eligibility record for the future calendar month indicates the Recipient has uncertified Medi-Cal Share of Cost (Eligibility Status Code begins with '5'):</p> <ul style="list-style-type: none"> The triggers indicate if they are in an unprocessed status. The triggers identify if the Recipient is Advance Pay.
24	16054	CI-111232 - DSD BR CM 24 IMPLEMENTED	MEDS Quarterly Reconciliation Interface Send	When MEDS Recon program is run, sends reconciliation file for the active IHSS cases.	Sends the following transactions to MEDS for the active IHSS cases: <ul style="list-style-type: none"> RI20 - Add/New Eligibility/Update Eligibility in County
25	11989 1 6052	CI-111233 - DSD BR CM 25 IMPLEMENTED	Pending Evidence is Approved and Status is Eligible or Presumptive Eligible	<p>When the Submit for Approval link is selected on screen and the outcome is Eligible.</p>	Send IH20 to MEDS <p>AND IF</p> <p>The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month</p> <p>ALSO</p> <p>Send S8 to SAWS with "Eligible" or "Presumptive Eligible" status. (See also DSD – Section 22 – Final Determination BR #21 – CI 111,309)</p>
26			Removed with SCF 4247 as a duplicate of CI 111,210		
27			Removed CR659 – SCF 3250		
28			Removed with SCF 4247 as a duplicate of CI 111,210		
30	16592	CI-111237 - DSD BR CM 30 IMPLEMENTED	SAWS Daily Receive	<p>When the SAWS Daily Receive file is received CMIPS will complete the following actions:</p>	<p>S3 – Medi-Cal Discontinuance - Produce Notification to Case Owner when a Medi-Cal Discontinuance is received</p> <p>The SAWS status/information is updated on Case SAWS Information screen</p>

No	Req ID	CI	Description	When	Action
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31	12142	CI-111238 - DSD BR CM 31 IMPLEMENTED	SCI Daily Receive	When the SCI Daily Receive is processed CMIPS will complete the following actions:	<p>If the CIN does not match an existing CIN in CMIPS then check Field Code value:</p> <p>If the Field Code is "421" – CIN change resulting from MEDS **11 transaction check Before Image of Data Field</p> <p>If Before Image of Data Field matches existing CMIPS CIN</p> <ul style="list-style-type: none"> • Update the associated CMIPS Person Record – Alternate ID Type – CIN with the CIN received from SCI • Set the Alternate ID Type – CIN From (date) to the date the SCI update is processed • Set the Update By to SCI Update Receive <p>Otherwise ignore record</p>
32	16004	CI-111239 - DSD BR CM 32 IMPLEMENTED	35C (Long Paid Claims)	When 35C (Long Paid Claims) job is run via batch scheduler.	Send paid claims for prior month for the IHSS payments (Advance and Arrears payments) to DHCS
33	12284	CI-111240 - DSD BR CM 33 IMPLEMENTED	IHO/WPCS Demographics	Each month In-Home Operations (IHO) will provide a file containing IHSS case numbers for IHO Recipients and wait for listed clients. CMIPS will compare this list with Recipients known to CMIPS and will provide demographic data file.	WPCS demographic data
34	12247	CI-111241 - DSD BR CM 34 IMPLEMENTED	Daily Update Funding Source Process	Processes cases identified as requiring funding source updates.	See Section below for Update Funding Source Business Rules
35a	12795	CI-111242 - DSD BR CM 35a IMPLEMENTED	Wage Rate Change – Individual Provider (IP)	Processes when an Individual Provider Wage Rate Update is ordered by the client.	<p>Based upon the Payroll (Advantage) sends Multiple Pay Rate End (Job 10023) to CMIPS process Pay Rate Refresh Job (CMNR903A) using the client indicated [Wage Rate Effective Date].</p> <p>CMIPS will process the Wage Rate Update against all CMIPS cases and apply the following:</p> <p>If one of the Individual Provider Wage Rates is determined to be the "Highest County Rate"¹ and an Eligible or Presumptive Eligible Status case is indicated as Advance Pay apply the Wage Rate Update as follows:</p> <p>If the current Authorization End Date is prior to the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Wage Rate Effective Date] and process Activate Evidence – Suppress NOA <p>Then add an Assessment Type – Wage Rate Update</p> <p>Set Program Evidence Authorization Start Date = [Wage Rate Effective Date]</p> <p>Set Program Evidence Authorization End Date to last day of calendar month associated with [Wage Rate Effective Date]</p> <p>If the Advance Pay is indicated update the existing Advance Pay Rate to the new Pay Rate associated with the existing Step and Grade</p> <ul style="list-style-type: none"> • Process Activate Evidence – Suppress NOA <p>Else, the current Authorization End Date is on or after the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to previous Authorization Start Date <p>If the Advance Pay is indicated update the existing Advance Pay Rate to the new Rate associated with the existing Step and Grade</p> <p>Process Activate Evidence – Suppress NOA</p>

35b	12795	 CI-111243 - DSD BR CM 35b IMPLEMENTED	Wage Rate Change – County Contractor (CC)	<p>Processes when a County Contractor Wage Rate Update is ordered by the client.</p> <p>CMIPS process Wage Rate Update based upon the County Contractor [Wage Rate Effective Date]:</p> <p>If any County Contractor Wage Rate is not determined to be the "Highest County Rate" do not process Wage Rate Update against Recipient caseload.</p> <p>Else, if any County Contractor Wage Rate is determined to be the "Highest County Rate" and the Case Status is Eligible or Presumptive Eligible apply the Wage Rate Update as follows:</p> <p>If the current Authorization End Date is prior to the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Wage Rate Effective Date] and process Activate Evidence <p>Then add an Assessment Type – Wage Rate Update – Suppress NOA</p> <ul style="list-style-type: none"> • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to last day of calendar month associated with [Wage Rate Effective Date] – Suppress NOA <p>Else, the current Authorization End Date is on or after the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to previous Authorization Start Date and process Activate Evidence – Suppress NOA
35c	12795	 CI-111244 - DSD BR CM 35c IMPLEMENTED	Wage Rate Change – Homemaker (HM)	<p>Processes when a Homemaker Wage Rate Update is ordered by the client.</p> <p>CMIPS process Wage Rate Update based upon the Homemaker [Wage Rate Effective Date]:</p> <p>If any Homemaker Wage Rate is not determined to be the "Highest County Rate" do not process Wage Rate Update against Recipient caseload.</p> <p>Else, if any Homemaker Wage Rate is determined to be the "Highest County Rate" and the Case Status is Eligible or Presumptive Eligible apply the Wage Rate Update as follows:</p> <p>If the current Authorization End Date is prior to the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Wage Rate Effective Date] and process Activate Evidence – Suppress NOA <p>Then add an Assessment Type – Wage Rate Update</p> <ul style="list-style-type: none"> • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to last day of calendar month associated with [Wage Rate Effective Date] – Suppress NOA <p>Else, the current Authorization End Date is on or after the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to previous Authorization Start Date and process Activate Evidence – Suppress NOA

36a	16661 16 664 16580	 CI-111245 - DSD BR CM IMPLEMENTED	Cost of Living Adjustment Processing – Benefit Level Increase – SOC Decrease 36a	<p>Processes when a Cost of Living Adjustment (Payment Standards to the Benefit Level Table) is ordered by the client which indicates an increase.</p>	<p>Update CMIPS Wage Rate Table: Benefit Level Code Table with the increased Benefit Level, then for all CMIPS cases with:</p> <ul style="list-style-type: none"> • a Case Status of Eligible or Presumptive Eligible • an IHSS Aid Code is 18, 28 or 68 • Any Income Source <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. <p>If the current Authorization End Date is prior to the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Cost of Living Adjustment • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Benefit Level Effective Date] and process Activate Evidence – Suppress NOA <p>Then add an Assessment Type – Cost of Living Adjustment</p> <ul style="list-style-type: none"> • Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] • Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence – Produce NOA SC06 <p>Report case on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH</p> <ul style="list-style-type: none"> • If the current Authorization End Date is on or after the [Benefit Level Effective Date] • Create an Assessment Type – Cost of Living Adjustment • Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] <p>Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA SC06</p>
36b	16580 16 661 16664	 CI-111246 - DSD BR CM IMPLEMENTED	Cost of Living Adjustment Processing – Benefit Level Decrease – SOC Increase 36b	<p>Processes when a Cost of Living Adjustment is ordered by the client which indicates a decrease to the Benefit Levels.</p>	<p>Update CMIPS Wage Rate Table: Benefit Level Code Table with the decreased Benefit Level, then for all CMIPS cases with:</p> <ul style="list-style-type: none"> • a Case Status of Eligible or Presumptive Eligible • an IHSS Aid Code is 18, 28 or 68 • Any Income Source <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. • If Pending Provider exists, Inactivate the Pending Provider <p>If the current Authorization End Date is prior to the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date to one day after previous Authorization End Date ◦ Set Program Evidence Authorization End Date to one day before [Benefit Level Effective Date] and process Final Determination – Suppress NOA • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ◦ Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence – Produce NOA SC03 ◦ Report case on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH <p>If the current Authorization End Date is on or after the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] <p>Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA SC03</p>

36c	16580 16 661 16664	CI-111247 - DSD BR CM 36c IMPLEMENTED	Cost of Living Adjustment Processing – Social Security Percentage Increase ^[1]	Processes when a Cost of Living Adjustment is ordered by the client increasing to the Social Security Percentage increase.	<p>Update CMIPS Wage Rate Table: Deductions Code Table with the increased Social Security Percentage then for CMIPS cases with:</p> <ul style="list-style-type: none"> • a Case Status of Eligible or Presumptive Eligible • an IHSS Aid Code is 18, 28 or 68 • And the Income Source is Retirement, Survivors, Disability Insurance (RSI) – Recipient <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. • If Pending Provider exists, Inactivate the Pending Provider <p>If the current Authorization End Date is <u>prior</u> to the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date to one day after previous Authorization End Date ◦ Set Program Evidence Authorization End Date to one day before [Benefit Level Effective Date] and process Final Determination – Suppress NOA • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ◦ Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence – Produce NOA SC04 <ul style="list-style-type: none"> ▪ Case will be reported on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH • If the current Authorization End Date is <u>on or after</u> the [Benefit Level Effective Date] <ul style="list-style-type: none"> ◦ Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ▪ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ▪ Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA SC04 <p>If any Income Source indicates SOCIS002 report case on SOC COLA WARNING REPORT – VET ADMIN BENEFIT CODE 2</p>
37	16818	CI-111248 - DSD BR CM 37 IMPLEMENTED	Update County Contractor Status	When the Modify County Contractor screen is saved and a Warrant Number and Paid Date are indicated	<ul style="list-style-type: none"> • Set the County Contractor status to Paid • Display Contract Expenditures Form link on the County Contract Coordinator – View County Contractor
38	12354	CI-111249 - DSD BR CM 38 IMPLEMENTED	Withdraw Case	When the Save link is selected on the Withdraw Case Screen	Send IH34 to MEDS if IH18 was previously sent Send S8 if Medi-Cal Aid Code is not 10, 20 or 60 *If a case is created and the Withdrawal action occurs on the same day, no transaction will be sent.
39	12634	CI-111250 - DSD BR CM 39 IMPLEMENTED	Send IHO/WPCS Paid Claims	When IHO/WPCS Paid Claims job is run via batch scheduler.	Paid claims for prior month for the WPCS payments are sent to IHO
40			Cancelled with CR 1269		

¹ Highest County Rate – Compare all Individual Provider, and if applicable County Contractor and Homemaker rates. Whichever rate is the highest will be considered the "Highest County Rate" and is used in determining the "Case SOC Compare Cost".

No	Req ID	CI	Description	When	Action
41			Removed		
42			Removed		
43			Removed		
44			Removed		
45			Removed		
46			Removed		
47			Removed		

48	12149 21262		SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS Applicant/Recipient – Includes SSN Update	When an S2 transaction is received and the indicated IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is "Pending" take the following action:	<p>If the Applicant CIN on the S2 does not match the CIN on the Person record associated with the IHSS Case Number</p> <p>AND</p> <p>Does not match an Active (non-end dated) CIN Alternative ID value for another person in CMIPS</p> <p>OR IF the Applicant SSN on the S2 does not match the SSN on the Person record associated with the IHSS Case Number</p> <p>AND</p> <p>Does not match an Active (non-end dated) SSN Alternative ID value for another person in CMIPS</p> <p>THEN</p> <ul style="list-style-type: none"> • Set 'To' date on Prior Person Record Alternative ID – SSN to (1) day prior to the transaction processing date • Create New Person Record Alternative ID – SSN with 'From' date to the transaction processing date <p>If new Applicant SSN record has been created, then:</p> <ul style="list-style-type: none"> • Produce Notification to the Case Owner– [case name] [case number] Recipient's SSN has been changed (DSD NOTF TN CM 41) <p>AND THEN</p> <p>Populate the following to the SAWS Eligibility Information Screen:</p> <ul style="list-style-type: none"> • Last Updated – Date S2 Transaction was processed in CMIPS: • Update Type – Code Table Value S2 – Notification of CIN creation or update for IHSS applicant/Recipient <p>If Applicant CIN (CIN + CIN Check Digit) does not match the CIN or the CIN is blank on the Person record associated with the IHSS Case Number</p> <ul style="list-style-type: none"> • Update Person Record Alternative ID – CIN • Set the Alternate ID CIN From date to the date the transaction was processed <p>If any of the following Applicant Name fields do not match the corresponding Name fields on the Person record associated with the IHSS Case Number update CMIPS Person Record:</p> <ul style="list-style-type: none"> • Applicant Last Name – Person Last Name • Applicant First Name – Person First Name • Applicant Middle Initial – Person Middle Name • Applicant Suffix – Person Suffix <p>If Last Name, First Name or Middle Initial, set Name Change Effective Date to date transaction is processed</p> <p>If the Applicant Gender does not match the corresponding Gender on the Person record associated with the IHSS Case Number update the CMIPS Person Gender</p> <ul style="list-style-type: none"> • Produce Notification to the Case Owner– [Case Number] [Person Name] gender updated by SAWS (DSD NOTF TN CM 44) <p>If the Applicant Date of Birth does not match the corresponding Date of Birth on the Person record associated with the IHSS Case Number update the CMIPS Person Date of Birth</p> <ul style="list-style-type: none"> • Produce Notification to the Case Owner– [Case Number] [Person Name] date of birth updated by SAWS (DSD NOTF TN CM 42) <p>Apply or update any of the following data:</p> <ul style="list-style-type: none"> • Medi-Cal Status • Medi-Cal Status Effective Date • Medi-Cal Status Reason • SAWS Eligibility Worker First Name • SAWS Eligibility Worker Last Name • SAWS Eligibility Worker Phone • SAWS Eligibility Worker Email
49	12149		SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS applicant/Recipient	When an S2 transaction is received and the IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is other than "Pending" take the following action:	<p>Populate the following to the SAWS Eligibility Information Screen:</p> <ul style="list-style-type: none"> • Last Updated – Date S2 Transaction was processed in CMIPS: • Update Type – Code Table Value S2 – Notification of CIN creation or update for IHSS applicant/Recipient <p>Apply or update any of the following data:</p> <ul style="list-style-type: none"> • Medi-Cal Status • Medi-Cal Status Effective Date • Medi-Cal Status Reason • SAWS Eligibility Worker First Name • SAWS Eligibility Worker Last Name • SAWS Eligibility Worker Phone • SAWS Eligibility Worker Email
50	12263 16954 21207		SAWS Daily Receive (CMDR4XXA) S3 – Notification of Medi-Cal Status	When an S3 transaction is received and processed by CMIPS:	<p>Set SAWS Eligibility Information Last Updated to the date the SAWS Daily Receive file is processed</p> <p>AND</p> <p>Set SAWS Eligibility Information Update Type –S3 – Notification of Medi-Cal Status</p> <p>AND</p>

If the Medi-Cal Status changes from Pending to Approved, then set the IHSSCase: mediCalEligNotifyDate with the date the SAWS Daily Receive file is processed produce Notification to the Case Owner-[case name] [case number] Initial Medi-Cal Eligibility Received

AND

If Medi-Cal Status changes from Discontinued to Approved, then produce Notification to the Case Owner-[case name] [case number] SAWS rescission of discontinuance.

AND

Produce Task to the Case Owner-[case name] [case number] SAWS discontinuance of IHSS Recipient effective [Medi-Cal Status Effective Date] for [Medi-Cal Status Reason]

AND IF

MEDI-CAL STATUS = Discontinued

AND

If MEDS MEDI-CAL STATUS REASON = 03 (Discontinuance at recipient request, MC only, CalWORKs/MC)

OR

MEDS MEDI-CAL STATUS REASON = 04 (Failure to cooperate)

OR

MEDS MEDI-CAL STATUS REASON = 50 (Refused to comply – property utilities requirement) (Not applicable to IHSS)

OR

MEDS MEDI-CAL STATUS REASON = 60 (Refused to provide CA7 or Medi-Cal Status report)

OR

MEDS MEDI-CAL STATUS REASON = 61 (Refused to provide essential information (non-CA7))

OR

MEDS MEDI-CAL STATUS REASON = 64 (Failed to complete Medi-Cal Midyear Status Review)

OR

MEDS MEDI-CAL STATUS REASON = 65 (Failed to complete Annual Medi-Cal RV)

OR

MEDS MEDI-CAL STATUS REASON = 89 (Whereabouts unknown – Medi-Cal)

OR

MEDS MEDI-CAL STATUS REASON = 97 (Discontinued at recipient request)

THEN

Set the start date of the Termination Auth segment 13 calendar days from the current date (current date is not counted) if the 13th day falls within the current calendar month

ELSE IF

The 13th day falls within the next calendar month, set the start date of the Termination Auth segment to be the first day of the next future calendar month.

AND

Generate TR25 NOA.

AND

Produce Notification to Case Owner-[case name] [case number] Case Terminated due to SAWS discontinuance of IHSS Recipient effective [discontinuance date] for reason [discontinuance reason]

AND

Do not produce an IH40 transaction

AND

IF the case is undergoing an In-Progress ICT
THEN the case receives an ICT cancel date when the termination occurs

ELSE the case has completed an ICT

THEN the ICT is not cancelled

AND

IF the assessment is past due
THEN the assessment end date is updated to the last day of the month in which the termination occurs and the termination begin date becomes the first day of the following month

AND

IF the case has any pending evidence
THEN delete pending evidence and display on the Evidence History screen

AND

IF the case has any pending flexible hours segments
THEN deactivate the segments
AND cancellation letter (DHCS 2269) is not triggered

AND

IF Future Authorization with Termination or Leave exists
THEN Authorization error is bypassed

No	Req ID	CI	Description	When	Action
51	12264	CI-111255 - DSD BR CM 51 IMPLEMENTED	Rescind Case	When the Rescind Case link is selected on the Case Home and the date of action is in a month for which the case has a Medi-Cal Eligibility record which has active Medi-Cal Eligibility	Display the Rescind Case pop-up without the Client Index Number search link
52	12264	CI-111256 - DSD BR CM 52 IMPLEMENTED	Rescind Case	When the Rescind Case link is selected on the Case Home and the date of action is in a month for which the case has a Medi-Cal Eligibility record which does not have active Medi-Cal Eligibility	Display the Rescind Case pop-up with the Client Index Number search link Client Index Number field is blank
53	12264	CI-111257 - DSD BR CM 53 IMPLEMENTED	Rescind Case	When the Rescind Case link is selected on the Case Home and the date of action is in a month for which the case does not have a Medi-Cal Eligibility record	Display the Rescind Case pop-up with the Client Index Number search link Client Index Number field is blank
54	12264	CI-111258 - DSD BR CM 54 IMPLEMENTED	Rescind Denied Case without CIN Selection	When the Save link on the "Rescind Case without Client Index Number search" screen is selected and: <ul style="list-style-type: none"> • Case Status was Denied • Medi-Cal Aid Code is 10, 20 or 60 for current Medi-Cal Eligibility Month 	Set the Case Status to Pending Send IH18 Transactions to MEDS
55	12264	CI-111259 - DSD BR CM 55 IMPLEMENTED	Rescind Denied Case without CIN Selection	When the Save link on the "Rescind Case without Client Index Number search" screen is selected and: <ul style="list-style-type: none"> • Case Status was Denied • Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month 	Set the Case Status to Pending Send IH18 Transactions to MEDS Send S8 Transaction to SAWS
56	12264	CI-111260 - DSD BR CM 56 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Eligible And the Medi-Cal Aid Code is 10, 20 or 60 for the current Medi-Cal Eligibility Month	Set the Case Status to Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS
57	12264	CI-111261 - DSD BR CM 57 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Eligible And the Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS Send S8 Transaction to SAWS
58	12264	CI-111262 - DSD BR CM 58 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Presumptive Eligible And the Medi-Cal Aid Code is 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Presumptive Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS

59	12264	CI-111263 - DSD BR CM 59 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Presumptive Eligible And the Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Presumptive Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS Send S8 Transaction to SAWS
60	12264	CI-111264 - DSD BR CM 60 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: Case Status was Terminated Case Status prior to Termination was Leave Medi-Cal Aid Code is 10, 20 or 60	Set the Case Status to Leave Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS

No	Req ID	CI	Description	When	Action
61	12264	CI-111265 - DSD BR CM 61 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: Case Status was Terminated Case Status prior to Termination was Leave Medi-Cal Aid Code is other than 10, 20 or 60	Set the Case Status to Leave Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS Send S8 Transaction to SAWS
63	12264	CI-111266 - DSD BR CM 63 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination was a Future Date to Rescind Action	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Terminated Case Status prior to Termination was Eligible or Presumptive Eligible Authorization End Date prior to Termination is a date future to the Rescind Case Action CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is 10, 20 or 60	Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Build Change Assessment Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status Process Final Determination without triggering NOA Build Change Assessment Set Authorization Start Date is the first date of the month following the prior Authorization Period. Set the Authorization End Date to the Authorization End Date prior to the Case Termination Process Final Determination with NOA triggers Send IH20 Transactions to MEDS

64	12264	 CI-111267 - DSD BR CM 64 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination is a date Future to the Rescind Case action	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Terminated Case Status prior to Termination was Eligible or Presumptive Eligible Authorization End Date prior to Termination is a date future to the Rescind Case Action CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is not 10, 20 or 60	Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Build Change Assessment Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status Process Final Determination without triggering NOA Build Change Assessment Set Authorization Start Date is the first date of the month following the prior Authorization Period. Set the Authorization End Date to the Authorization End Date prior to the Case Termination Process Final Determination with NOA triggers Send IH20 Transactions to MEDS Send S8 Transaction to SAWS
65	12264	 CI-111268 - DSD BR CM 65 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination was a date before the Rescind Action	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Terminated Case Status prior to Termination was Eligible or Presumptive Eligible Authorization End Date prior to Termination is a date before the Rescind Case Action CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is 10, 20 or 60	Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Build Change Assessment Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status Process Final Determination without triggering NOA Build Change Assessment Set Authorization Start Date is the first date of the month following the prior Authorization Period. Set the Authorization End Date to the last day of the Authorization Start Date Process Final Determination with NOA triggers Send IH20 Transactions to MEDS

66	12264	CI-111269 - DSD BR CM 66 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination was a date before the Rescind Action	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Terminated Case Status prior to Termination was Eligible or Presumptive Eligible Authorization End Date prior to Termination is a date before the Rescind Case Action CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is not 10, 20 or 60	Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Build Change Assessment Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status Process Final Determination without triggering NOA Build Change Assessment Set Authorization Start Date is the first date of the month following the prior Authorization Period. Set the Authorization End Date to the last day of the Authorization Start Date Process Final Determination with NOA triggers Send IH20 Transactions to MEDS Send S8 Transaction to SAWS
67	12027	CI-111270 - DSD BR CM 67 IMPLEMENTED	Build Medi-Cal Eligibility Month record	CMIPS will build a Medi-Cal Eligibility Month record when: MEDS Monthly Renewal is processed and a MEDS Monthly Renewal record is not received for an CMIPS case in Pending Eligible, Presumptive Eligible or Leave status	Medi-Cal Eligibility Record data will be: <ul style="list-style-type: none"> • ELIGIBILITY MONTH - MEDS Monthly Renewal "Eligibility Month/Year" • LAST UPDATED – Current Date • RECORD TYPE = No MEDS Eligibility • FFP = N • BIC ISSUE DATE – Same as BIC Issue Date on prior MEDS Eligibility Month record • CIN = Same as CIN + Check Digit on prior MEDS Eligibility Month record • MEDICAL DATE OF BIRTH – Same as Medi-Cal Date of Birth on prior MEDS Eligibility Month record • MEDICAL COUNTY ID – Same as the Medi-Cal County ID on prior MEDS Eligibility Month record All other data elements will default to blank Trigger Task Trigger Task "[case name] [case number] Medi-Cal Eligibility Termination".
68	16026	CI-111271 - DSD BR CM 68 IMPLEMENTED	Build Medi-Cal Eligibility Month record	When the Rescind Case action occurs and the CIN selected has active Medi-Cal and no MEDS Eligibility record exists for the Eligibility Month in which the action is take or a previous month	Medi-Cal Eligibility Record data will be created from OM Transaction data and set MEDS Transaction Type to SCI OM Transaction
69	12264	CI-111272 - DSD BR CM 69 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Terminated Case Status prior to Termination was Leave CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is 10, 20 or 60	Set Status to Leave Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Send IH20 Transactions to MEDS

70	12264	 CI-111273 - DSD BR CM 70 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	<p>When the Save link on the "Rescind Case with Client Index Number search" screen is saved and:</p> <p>Case Status was Terminated</p> <p>Case Status prior to Termination was Leave</p> <p>CIN selected matches the CIN previously on the case</p> <p>Selected CIN has Active Medi-Cal</p> <p>Medi-Cal Aid Code is not 10, 20 or 60</p>	<p>Set Status to Leave</p> <p>Set Authorization Start Date to Authorization Start Date prior to Termination</p> <p>Set Authorization End Date to Authorization End Date prior to Termination</p> <p>If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data</p> <p>Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date</p> <p>Send IH20 Transactions to MEDS</p> <p>Send S8 Transaction to SAWS</p>
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No	Req ID	CI	Description	When	Action
71	12264	 CI-111274 - DSD BR CM 71 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	<p>When the Save link on the "Rescind Case with Client Index Number search" screen is saved and:</p> <p>Case Status was Denied</p> <p>CIN selected matches the CIN previously on the case</p> <p>Selected CIN has Active Medi-Cal</p> <p>Medi-Cal Aid Code is 10, 20 or 60</p>	<p>Set Status to Pending</p> <p>If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data</p> <ul style="list-style-type: none"> • Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date • Send IH34 Transactions to MEDS
72	12264	 CI-111275 - DSD BR CM 72 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	<p>When the Save link on the "Rescind Case with Client Index Number search" screen is saved and:</p> <p>Case Status was Denied</p> <p>CIN selected matches the CIN previously on the case</p> <p>Selected CIN has Active Medi-Cal</p> <p>Medi-Cal Aid Code is not 10, 20 or 60</p>	<p>Set Status to Pending</p> <p>If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data</p> <ul style="list-style-type: none"> • Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date • Send IH34 Transactions to MEDS • Send S8 Transaction to SAWS
76	12492	 CI-111276 - DSD BR CM 76 IMPLEMENTED	Modify Homemaker Timesheet screen	When the Save link is selected on the Modify Homemaker Timesheet screen and the current Status is Rejected	Update the Status to Not Submitted
77	12007 16970	 CI-111277 - DSD BR CM 77 IMPLEMENTED	Update Funding Source	When Funding Source Update processing is required and the Authorization End Date of the current Active Evidence is a date in the past CMIPS shall create and Authorization Period for the missing period of time to fill the missing period:	<ul style="list-style-type: none"> • If Pending Evidence exists, Delete Pending Evidence • If Pending Provider exists, Inactivate the Pending Provider <p>Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date</p> <ul style="list-style-type: none"> • Set the Authorization Start Date to the day following the previous Authorization End Date • Set the Authorization End Date to the first day of the month prior to the calendar month in which the current Funding Source Update will apply. • Process Final Determination suppressing resulting NOA.
78	12007 12447 12448 16970	 CI-111278 - DSD BR CM 78 IMPLEMENTED	Update Funding Source	<p>Once an Eligible Authorization is established through the processing of Final Determination of an Initial, Change, Reassessment, Telehealth, or Inter-County Transfer Assessment, CMIPS shall evaluate the IHSS Funding Source when the Medi-Cal Eligibility FFP changes from Yes to No (FFP = Y to FFP = N)</p>	<p>When MEDS Daily Update or MEDS Monthly Renewal processes and the MEDS Eligibility month being processed already exists and if the FFP changes from Y to N or if MEDS Eligibility month being processed has an FFP change from Y to N compared with the prior MEDS Eligibility month and the previous Funding Source is PCSP, CFCO or IPO</p> <ul style="list-style-type: none"> • If Pending Evidence exists, Delete Pending Evidence • If Pending Provider exists, Inactivate the Pending Provider <p>Create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.</p> <ul style="list-style-type: none"> • Set Authorization Start Date to the first day of the next service month where no payments have been issued • Set the Authorization End Date to the Authorization End Date on the previous assessment, if that date is in a month future to the month in which the action is being taken • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) <p>Process Final Determination producing applicable NOA (Changes Funding Source from PCSP, CFCO or IPW/IPO to IHSS-R) bypass edit for 10 day notification for NOA.</p>

79	12007 12447 12448 16666 16 970	 CI-111279 - DSD BR CM 79 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established through the processing of Final Determination of an Initial, Change, Reassessment, Telehealth, or Inter-County Transfer Assessment, CMIPS shall evaluate the IHSS Funding Source when Medi-Cal Eligibility FFP changes from No to Yes (FFP = N to FFP = Y)	<p>When MEDS Daily Update or MEDS Monthly Renewal processes and the MEDS Eligibility month being processed already exists and if the FFP changes from N to Y or if MEDS Eligibility month being processed has an FFP change from N to Y compared with the prior MEDS Eligibility month</p> <ul style="list-style-type: none"> • If Pending Evidence exists, Delete Pending Evidence • If Pending Provider exists, Inactivate the Pending Provider <p>Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.</p> <ul style="list-style-type: none"> • Set Authorization Start Date to the first day of the service month for which the FFP change applies if no payments have been issued for that service month. • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which payment has not been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current month, in which the action is being taken • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • If Presumptive Eligibility is indicated, deselect the Presumptive Eligible Indication <p>Process Final Determination producing applicable NOA (Changes Funding Source from IHSS-R to IPW/IPO, CFCO or PCSP)</p>
80	12007 12447 12448 16 666 16970	 CI-111280 - DSD BR CM 80 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established CMIPS shall evaluate each case at the end of a calendar month prior to the month in which the "Recipient turns 18"	<p>When the Recipient turns 18 and the previous Funding Source was IHSS-R, CFCO or PCSP, no Funding Source Update needed (Funding Source remains IHSS-R, CFCO or PCSP).</p> <ul style="list-style-type: none"> • If Funding Source was IHSS-R or CFCO • And any Provider Relationship to Recipient is "Parent of minor child" change to "Parent of Adult Child" • Update Relationship Status Date to the first day of the month in which the Recipient turns 18 <p>If previous Funding Source is IPO5 and a Provider with the "Relationship to Recipient" is "Parent of Minor Child" is active on the case and any combination of the following exist on the case no Funding Source Update is needed (Funding Source remains IPO5)</p> <ul style="list-style-type: none"> • Advance Pay • Restaurant Meals • Spouse Provider <p>Else, if previous Funding Source is IPO5 because a Provider has a Relationship to the Recipient of "Parent of a Minor Child" and only one of the following (Funding Source changes from IPO5 to IPO1, IPO2 or IPO4)</p> <ul style="list-style-type: none"> • Advance Pay • Restaurant Meals • Spouse Provider • Change Provider record(s) "Relationship to Recipient" from "Parent of minor child" to "Parent of an Adult Child" • Update Relationship Status Date to the first day of the month in which the Recipient turns 18. • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month in which the "Recipient Turns 18" if no payments have been issued for that service month <p>Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has not been issued</p> <ul style="list-style-type: none"> • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the month, in which the action is being taken <p>Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility)</p> <ul style="list-style-type: none"> • Process Final Determination producing applicable NOA (Changes from IPO5 to IPO1, IPO2 or IPO4). • Else Funding Source is IPO3 • Change Provider record(s) "Relationship to Recipient" from "Parent of minor child" to "Parent of an Adult Child" • Update Relationship Status Date to the first day of the month in which the Recipient turns 18. • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month in which the "Recipient turns 18" if no payments have been issued for that service month <p>Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has not been issued</p> <ul style="list-style-type: none"> • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current month, in which the action is being taken <p>Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility)</p> <p>Process Final Determination producing applicable NOA (Changes from IPO3 to PCSP).</p>

No	Req ID	CI	Description	When	Action
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81	12007 12299 12447 12448 16 666 16671 16945 16970	 CI-111281 - DSD BR CM 81 IMPLEMENTED	Update Funding Source	<p>Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is terminated with a Relationship to Recipient of "Parent of minor child".</p>	<p>When a Provider is Terminated and the "Relationship to Recipient" is "Parent of minor child" and the previous Funding Source is IHSS-R or CFCO, no Funding Source Update needed (Funding Source remains IHSS-R or CFCO),</p> <ul style="list-style-type: none"> • Else if previous Funding Source is IPO5 and the case has any combination of the following, Advance Pay and/or Restaurant Meals and /or a Provider with the Relationship to the Recipient of Spouse, and /or has a Provider with the Relationship to the Recipient is "Parent of minor child", apart from the Provider being terminated, no Update Funding Source action required (Funding Source remains IPO5) • Else if Previous Funding Source is IPO5 and has any one of the following, Advance Pay or Restaurant Meals or a Provider with the Relationship to the Recipient of Spouse • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month following the month in which the Provider is terminated if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes from IPO5 to IPO1, IPO2, or IPO4). • Else previous Funding Source is IPO3 and there is another Provider with the Relationship to the Recipient of "Parent of minor child", apart from the Provider being terminated no Funding Source Update needed (Funding Source remains IPO3) • Else previous Funding Source is IPO3 • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month following the month in which the Provider is terminated if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes from IPO3 to PCSP or CFCO).
82	12007 12299 12447 12448 16 666 16670	 CI-111282 - DSD BR CM 82 IMPLEMENTED	Update Funding Source	<p>Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is added with a Relationship to Recipient of "Parent of a minor child"</p>	<p>If a Provider is added with a "Relationship to Recipient" of "Parent of minor child" and the previous Funding Source is IHSS-R, CFCO, IPO3 or IPO5 no Funding Source Update action required (Funding Source remains IHSS-R, CFCO, IPO3 or IPO5).</p> <ul style="list-style-type: none"> • Else if previous Assessment was Initial • And the Begin Date of the Parent of a Minor Child Provider being added is equal to or within the same calendar month as Authorization Start Date of Initial Assessment and no payments have been issued for the Authorization Start Date month • Create an Assessment Type of "Funding Source Update" – Cloning all Initial Assessment Evidence and set the Authorization Start Date to the Authorization Start Date of the Initial Assessment • Set Authorization End Date to the Authorization End Date of the Initial Assessment • Process Final Determination producing applicable NOA (Changes from PCSP, IPO1 or IPO2 to IPO3 or IPO5) bypass edit for 10 day notification for NOA. • Otherwise set Authorization Start Date to the first day of the next service month for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP, IPO1, or IPO2 to IPO3 or IPO5). • Else if previous Assessment Type is not Initial and Funding Source IPO1, IPO2, or IPO4 • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month following the month in which the Provider is added if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes from IPO1, IPO2, IPO4 to IPO5). • Else the previous Funding Source is PCSP • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the next service month in which the Provider is added and for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP to IPO3).

83	12007 12299 12447 12448 16 666 16671 16945 16970	CI-111283 - DSD BR CM 83 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is terminated with a Relationship of Spouse	If a Provider is Terminated with a "Relationship to Recipient" of "Spouse" and the previous Funding Source is IHSS-R or CFCO, no Funding Source Update action required (Funding Source remains IHSS-R or CFCO). <ul style="list-style-type: none"> • Else if previous Funding Source is IPO 5 and case has any combination of the following, Advance Pay and/or Restaurant Meals and/or a Provider with the Relationship to the Recipient of Parent of a Minor Child, no Funding Source Updated action required (Funding Source remains IPO5). • Else if previous Funding Source is IPO5 and has any one of the following, Advance Pay or Restaurant Meals or a Provider with the "Relationship to the Recipient" of "Parent of a Minor Child", other than the one being terminated • Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month after which the Provider is terminated if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes Funding Source from IPO5 to IPO1, IPO2, IPO3) bypass edit for 10 day notification for NOA. • Else previous Funding Source is IPO4 • Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month after which the Provider is terminated if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes Funding Source from IPO4 to PCSP).
84	12007 12299 12447 12448 16 666 16970	CI-111284 - DSD BR CM 84 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is added with a Relationship to Recipient of Spouse	If a Provider is added with a Relationship to Recipient of "Spouse" and the previous Funding Source is IHSS-R, CFCO or IPO5 no Funding Source Update action required (Funding Source remains IHSS-R, CFCO or IPO5). <ul style="list-style-type: none"> • Else if previous Assessment Type was Initial • and the Begin Date of the "Spouse" Provider being added is equal to or within the same calendar month as Authorization Start Date of Initial Assessment and no payments have been issued for the Authorization Start Date month • Create an Assessment Type of "Funding Source Update" – Cloning all Initial Assessment Evidence and set the Authorization Start Date to the Authorization Start Date of the Initial Assessment • Set Authorization End Date to the Authorization End Date of the Initial Assessment • Process Final Determination producing applicable NOA (Changes from PCSP, IPO1 or IPO2 to IPO4 or IPO5) bypass edit for 10 day notification for NOA. • Otherwise set Authorization Start Date to the first day of the next service month for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP, IPO1, or IPO2 to IPO3 or IPO5). • Else if previous Funding Source is IPO1, IPO2, or IPO3 • Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month after which the Provider is added if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes Funding Source from IPO1, IPO2, IPO3 or IPO5). • Else the previous Funding Source is PCSP • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the next service month in which the Provider is added and for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP to IPO4).
85	16882	CI-1118144 - DSD BR CM 85 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Reason is "Health Care Certification – Not Received"	<ul style="list-style-type: none"> • Set the case Status to Terminated • Trigger NOA TR22 – Health Care Certification – Not Received

86	16892	CI-123879 - DSD BR CM 86 IMPLEMENTED	Modify Hours Reduction	When the Reduced Hours percentage and associated dates are modified	<ul style="list-style-type: none"> • Apply percentage and associated date changes to Reduce Hours Control Table per CDSS request • Set Reduced Hours Control Table Start Date to CR requested Start Date • Set Reduced Hours Control Table Percentage to CR requested percentage. • Build Missing Period • If current Active Evidence Authorization End Date is prior to current Reduced Hours Start Date • Create Assessment Type State Mandated Change cloning all prior Evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to one day prior to the Reduced Hours Start Date • Process Final Determination – Suppress NOA • Process Modify Reduced Hours • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to last day of the Reduced Hours Start Date month (one month eligibility) • Process Final Determination – Producing all applicable NOAs • Else current Active Evidence Authorization End Date is after Reduced Hours Start Date • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to Reduced Hours Start Date • Set Authorization End Date to previous Evidence Authorization End Date • Process Final Determination – Producing all applicable NOAs • Provider Hours will be updated based upon Final Determination Business Rules 66a – 66d
87	16830	CI-123880 - DSD BR CM 87 IMPLEMENTED	Modify LMA	When the LMA is modified	<ul style="list-style-type: none"> • Apply Changes to LMA Control Table • Update LMA Control Table Start Date • Change LMA Control Table Percentage • Change LMA Control Table W & I Code • If Pending Evidence exists, delete the Pending Evidence. • Build Missing Period • If current Active Evidence Authorization End Date is in a month prior to the current LMA Start Date • Create Assessment Type State Mandated Change cloning all prior Evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to one day prior to the LMA Start Date • Process Final Determination – Suppress NOA • Process Modify LMA • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to the last day of the LMA Start Date month (one month eligibility) • Process Final Determination – Producing all applicable NOAs • Else current Active Evidence Authorization End Date is after LMA Start Date • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to LMA Start Date • Set Authorization End Date to previous Evidence Authorization End Date • Process Final Determination – Producing all applicable NOAs • Provider Hours will be updated based upon Final Determination Business Rules 66a – 66d
88	16928	CI-437237 - DSD BR CM 88 IMPLEMENTED	Clone Assessment Narrative – User added assessment	When a user creates any Assessment Type other than Initial or Inter-County Transfer	The Assessment Narrative from the most recent Active Evidence is cloned to Pending Evidence
89	16929	CI-437238 - DSD BR CM 89 IMPLEMENTED	Clone Assessment Narrative – batch processing assessment	When an assessment is created through batch processing	The Assessment Narrative from the most recent Active Evidence is cloned to the system-generated assessment
90	16062	CI-437233 - DSD BR CM 90 IMPLEMENTED	MEDS Daily - Disability Determination Task	When a MEDS Daily record is received and the Disability Determination Date is indicated and the current MEDS Eligibility record does not have the Disability Determination Date indicated and the current case status is Pending, Eligible, Presumptive Eligible or Leave and no "Open" "Disability Determination received from Medi-Cal" task exists	Trigger the "Disability Determination received from Medi-Cal" task

No	Req ID	CI	Description	When	Action
91	16062	CI-437234 - DSD BR CM 91 IMPLEMENTED	MEDS Monthly Renewal - Disability Determination Task	When a MEDS Monthly Renewal record is received and the Disability Determination Date is indicated and the current MEDS Eligibility record does not have the Disability Determination Date indicated and the current case status is Pending, Eligible, Presumptive Eligible or Leave and no "Open" "Disability Determination received from Medi-Cal" task exists	Trigger the "Disability Determination received from Medi-Cal" task

92	16126	 CI-437235 - DSD BR CM 92 IMPLEMENTED	MEDS Daily – Recipient Death Notification – Source MEDS	When a MEDS Daily record is received and indicates a "Death Date" and the current MEDS Eligibility record does not have the Death Date field indicated and no "Open" "Recipient Death Notification – Source MEDS" task exists	Trigger the "Recipient Death Notification – Source MEDS" task
93	16052	 CI-444456 - DSD BR CM 93 IMPLEMENTED	Send MEDS ID	When any MEDS Transaction is triggered the CMIPS Alternate ID Type MEDS ID is present	<ul style="list-style-type: none"> Send the CMIPS Alternate ID Type MEDS ID Or, if no Alternate ID Type MEDS ID, send Alternate ID Type Social Security Number
94	16937	 CI-444457 - DSD BR CM 94 IMPLEMENTED	CIN Re-Clearance	When the Save link is selected on the Create Alternate ID Type Client Index Number and the Alternate ID is other than blank and the Case Status is Eligible, Presumptive Eligible or Leave	Send an IH20 to MEDS
95	16937	 CI-444458 - DSD BR CM 95 IMPLEMENTED	CIN Re-Clearance	When the Save link is selected on the Create Alternate ID Type Client Index Number and the Alternate ID number other than blank and the Case Status is Pending	Send an IH18 to MEDS
96	16939	 CI-444533 - DSD BR CM 96 IMPLEMENTED	Modify Medi-Cal Eligibility – Eligibility Month Change	When the Modify Medi-Cal Eligibility – Eligibility Month indication has been changed	Create a new Medi-Cal Eligibility record for the Month/Year the user indicated: <ul style="list-style-type: none"> Copy all populated fields other than the Eligibility Month (MM /YYYY) to the new record Set MM/YYYY to user indicated date Set the Last Updated Date to the current date Set the Type to Manual Update
97	16939	 CI-444534 - DSD BR CM 97 IMPLEMENTED	Modify Medi-Cal Eligibility	When the Modify Medi-Cal Eligibility screen is saved and the Eligibility Month has not been change, but another field has been changed	Save the updated information: <ul style="list-style-type: none"> Save all modified fields Set the Last Updated Date to the current date Set the Type to Manual Update
98	12264	 CI-445319 - DSD BR CM 98 IMPLEMENTED	Rescind Case "Cancel" link is selected	When the "Cancel" link is selected on the Rescind Case screen	Cancel the Rescind Case action and display the Case Home
99	12264	 CI-445320 - DSD BR CM 99 IMPLEMENTED	Rescind Case "Continue" link is selected	When the "Continue" link is selected on the Rescind Case screen and any of the following conditions are encountered: The MEDS Eligibility FFP indication has changed in the Authorization Period prior to termination Or a Cost of Living Adjustment was processed after the termination of a case with IHSS Share of Cost Evidence Or a Wage Rate was processed for the county to which the case is assigned in the Authorization Period prior to the termination Or a State Mandated Change was processed in the Authorization Period prior to the termination Or a Parent of a Minor Child or Spouse has a Terminated Provider Hours Segment with a Begin Date after the Authorization Start Date	Allow the Rescind Action <ul style="list-style-type: none"> Set the Authorization Start Date to the Authorization Start Date of the Authorization prior to the Terminate Case action Set the Authorization End Date to the last day of the calendar month prior to the following change: <ul style="list-style-type: none"> FFP Change Cost of Living Adjustment Begin Date Wage Rate Begin Date State Mandated Change Begin Date Or if Parent of a Minor Child or Spouse has been termination set the Authorization End Date to the last day of the month associated with the Termination Begin Date.

100	16940	CI-446859 - DSD BR CM 100 IMPLEMENTED	Terminate Case	When the "Save" link is selected on the Terminate Case screen and the current status is Leave	<ul style="list-style-type: none"> If Termination Reason selected is "Recipient Death" and the Authorization End Date prior to Leave is a date prior to the current date Add an Assessment Type – Change Set Program Evidence Authorization Start Date to one day after the Leave "From" date Set the Program Evidence End Date to the last day of the month of the Terminate Case Authorization End Date Process the Authorization Authorization Decision = Ineligible Suppress all NOA Suppress all interfaces Process Terminate Case Action Set Termination Reason to Death Set Termination Authorization End Date to the Terminate Case Authorization End Date Process Authorization Produce Applicable NOA Trigger applicable interfaces Else Termination Reason is other than Death and requires a 10-day notice and the Authorization End Date prior to Leave is a date prior to the current date Add an Assessment Type – Change Set Program Evidence Authorization Start Date to one day after the Leave "From" date Set the Program Evidence End Date as follows: If current date is more than 13 calendar days from the end of the current month, set Authorization End Date to last day of current month Else current date is less than 13 calendar days from the end of the current month, set Authorization End Date to last day of next month Process the Authorization Authorization Decision = Ineligible Suppress all NOA Suppress all interfaces Process Terminate Case Action Set Termination Reason to Termination Case Reason Set Termination Authorization End Date to current Terminate Case Authorization End Date Process Authorization Produce Applicable NOA Trigger applicable interfaces
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No	Req ID	CI	Description	When	Action
101	16942 16959	CI-451130 - DSD BR CM 101 IMPLEMENTED	Print barcode on forms generated by Vendor Print Center (500XINRN)	When a form is generated in the batch job Centralized Print Solution (500XINRN) per a CR submitted by CDSS.	A barcode, designating the number of pages printed per mailing Recipient is added to the Cover Page of all mailings from the Vendor Print Center when the Centralized Print Solution (500XINRN) batch job processes.
102	12264 12524	CI-451620 - DSD BR CM 102 IMPLEMENTED	Rescind Terminated Case – State Hearing Filed before Termination effective	<p>When the Save link is selected on the "Rescind Case" screen</p> <p>AND</p> <p>The Case Status was Terminated</p> <p>AND</p> <p>The Case Status prior to Termination was Eligible or Presumptive Eligible</p> <p>AND</p> <p>The Rescind Reason is "State Hearing Filed before Termination effective"</p>	<p>Set the Case Status to the Case Status prior to Termination.</p> <p>AND</p> <p>Set Authorization Start Date to Authorization Start Date prior to Termination.</p> <p>AND</p> <p>Set Authorization End Date to Authorization End Date prior to Termination.</p> <p>AND</p> <p>Trigger NOA SH05 and all other applicable NOAs.</p>
103	16891 20733	CI-468367 - DSD BR CM 103 IMPLEMENTED	Recipient Targeted Mailing	Form Mass Mailing Implementation.	<p>Determine written language for mailing insert:</p> <ul style="list-style-type: none"> If the Recipient's Written Language is Spanish, mailing insert should be Spanish Language. Else, if the Recipient's Written Language is Chinese, mailing insert should be Chinese Language. Else, if the Recipient's Written Language is Armenian, mailing insert should be Armenian Language. Else, if Written Language is not Spanish, Chinese, or Armenian, mailing insert should be English Language. For any Recipient with a Written Language other than English, Spanish, Chinese, or Armenian, also include GEN1365(MUL).

104	20734	CI-480717 - DSD BR CM 104 IMPLEMENTED	Display Select Provider Name	When the Provider Name search icon is selected on the Create Recipient Workweek Agreement screen.	Display a list, by Provider name of all Providers currently associated with the Recipient case.
105	20734	CI-480722 - DSD BR CM 105 IMPLEMENTED	Create Recipient Workweek Agreement or Modify Recipient Workweek Agreement	As the user enters or modifies time entries in any of the Hours or Minutes fields for the Weekly, or any daily hour on the Recipient Workweek Agreement.	Dynamically update the Total Hours field on the Create Recipient or Modify Recipient Workweek Agreements screens as data is keyed into any daily hours and/or minutes (Sunday through Saturday) fields.
106	20736	CI-480718 - DSD BR CM 106 IMPLEMENTED	Nightly Batch - Determine Number of Active Providers – Case Home (500HINDN)	In the nightly batch determine the Number of Active Providers.	Determine the Number of Active Providers and populate to the Case Home - Number of Active Providers using the following criteria: Case Status is: <ul style="list-style-type: none">• Eligible• Or Presumptive Eligible• Or Leave And the Eligible field on any case Provider is: <ul style="list-style-type: none">• Yes or• No But a Provider Hours segment for the current day is Active.
107	20734	CI-480723 - DSD BR CM 107 IMPLEMENTED	End Date Recipient Workweek Agreement when case status changes to Leave or Terminated	When the Case Status changes to Terminated or Leave AND There are Recipient Workweek Agreements with an End Date in the future.	Set the Recipient Workweek Agreement End Date as follows: <ul style="list-style-type: none">• If the case Authorization End Date is before the most recent Recipient Workweek Agreement Begin Date, set this future dated Workweek Agreement status to Inactive.• If the case Authorization End Date is a date before the End Date of an existing Recipient Workweek Agreement, set the Recipient Workweek Agreement End Date to the Authorization End Date.• Else, if the Authorization End Date is a date prior to the current date, set the Recipient Workweek Agreement End Date to the current date.
108	20735	CI-480720 - DSD BR CM 108 IMPLEMENTED	End Date Provider Workweek Agreement when case status changes to Leave or Terminated	When the Case Status changes to Leave or Terminated AND An associated Provider has a Provider Workweek Agreement for this Recipient with an End Date in the future.	<ul style="list-style-type: none">• Set the associated Provider Workweek Agreement End Date as follows:<ul style="list-style-type: none">• If the case Authorization End Date is before the most recent Provider Workweek Agreement Begin Date, set this future dated Workweek Agreement status to Inactive.• If the case Authorization End Date is a date before the End Date of an existing Provider Workweek Agreement, set the Provider Workweek Agreement End Date to the Authorization End Date.• Else, if the Authorization End Date is a date prior to the current date, set the Provider Workweek Agreement End Date to the current date.
109	20739	CI-480731 - DSD BR CM 109 IMPLEMENTED	Calculate Case Monthly Overtime Maximum	When a case assessment is authorized AND the Auth to Purchase after Adjusted Hours either increases or decreases.	Calculate the Monthly Overtime Maximum as ((Case Weekly Maximum - 40) * 4) <ul style="list-style-type: none">• Negative values are set to zero.• Fractions of minute should be rounded up or down to the nearest minute.
110			This Business Rule was removed with CR 1132		

No	Req ID	CI	Description	When	Action
111			This Business Rule was removed with CR 1132		
112			This Business Rule was removed with CR 1132		
113			This Business Rule was removed with CR 1132		
114			Removed		

115	20736 20737 20739 20740 20743 12072	 CI-480945 - DSD BR CM 115 IMPLEMENTED	Implement Overtime – State Mandated Change – One-Time Batch	This one-time batch job will be run to apply the following to the Recipient case at the implementation of overtime.	<p>Process with Overtime Implementation as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. • If the current Authorization End Date is prior to FLSA Start Date • Create an Assessment Type – State Mandated Change • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day prior to FLSA Start Date and process Final Determination – Suppress NOA • Create an Assessment Type – State Mandated Change • Set Program Evidence Authorization Start Date FLSA Start Date • Set Program Evidence Authorization End Date to last day of FLSA Start Date month and process Final Determination – Suppress NOA • If the current Authorization End Date is on or after the one day prior to the FLSA Start Date • Create an Assessment Type – State Mandated Change • Set Program Evidence Authorization Start Date FLSA Start Date • Set Program Evidence Authorization End Date to previous Authorization End Date and process Final Determination – Suppress NOA <p>After the assessment with the FLSA Start Date Authorization Start Date is processed, populate the following:</p> <ul style="list-style-type: none"> • The Number of Active Providers to the Case Home • Create and populate the FLSA Start Date Month (MM/YYYY) Monthly Overtime Maximums monthly record with the following case data: • Monthly Authorized Hours (Authorization Summary: Total Auth to Purchase after Adjusted Hours) • Weekly Authorized Hours (Authorization Summary: Weekly Authorized Hours: 31 Day Month) • Weekly Maximum (Recipient Weekly Maximum) • Monthly Overtime Maximum (Recipient Monthly Overtime Maximum) <p>Populate the following to the Provider Details screen:</p> <ul style="list-style-type: none"> • Number of Active Cases • Provider Weekly Maximum • Provider Overtime Maximum
116	20734	 CI-480946 - DSD BR CM 116 IMPLEMENTED	End Date Recipient Workweek Agreement when new segment is created	<p>When the Save link is selected on the Create Recipient Workweek Agreement screen is selected and the previous Recipient Workweek Agreement had an End Date as either:</p> <p>The System High Date 12/31/9999</p> <p>Or a date future to the current Create Recipient Workweek Agreement Begin Date</p>	Set the End Date on the previous Recipient Workweek Agreement to one day before the current Create Recipient Workweek Agreement Begin Date.
117	20804	 CI-484131 - DSD BR CM 117 IMPLEMENTED	Modify and Inactivate Form – Regenerate NOA – Audio CD or Data CD	<p>When the Save Link on the Modify and Inactivate Form screen is selected</p> <p>And</p> <p>The Regenerate BVI NOA checkbox is selected</p> <p>And</p> <p>The BVI Notice of Action Option is Audio CD or Data CD</p>	<p>Regenerate and send standard PDF NOA to county printer</p> <p>Set Status on BVI format Cluster to Regenerated</p> <p>Regenerate manifest detail for interface CMDS876A</p> <p>AND</p> <p>IF the standard PDF NOA was generated in Spanish, Chinese, or Armenian</p> <p>Then generate the NOA as an unlocked Spanish, Chinese, or Armenian PDF with imbedded fonts for interface CMDS876A</p> <p>Else generate NOA as unlocked English PDF with imbedded fonts for interface CMDS876A</p>
118			Removed with CR 1183		
119	20770	 CI-486339 - DSD BR CM 119 IMPLEMENTED	Set Notice of Action Option – Create Blind or Visually Impaired	<p>When the Save link is selected on the Create Blind or Visually Impaired screen and the Notice of Action Option is:</p> <p>Braille Documents</p> <p>Or</p> <p>Audio CD</p> <p>Or</p> <p>Data CD</p>	<p>Set NOA Delivery to selected Notice of Action Option for generation and mailing of NOAs.</p> <p>And</p> <p>Maintain standard generation and mailing of PDF NOAs.</p>
120	20770	 CI-486340 - DSD BR CM 120 IMPLEMENTED	Set Notice of Action Option – Create Blind or Visually Impaired	<p>When the Save link is selected on the Create Blind or Visually Impaired screen and the Notice of Action Option has been selected of:</p> <ul style="list-style-type: none"> • Large Font NOA 	Set NOA Delivery to selected Notice of Action Option for generation and mailing of NOAs.

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121	20770	 CI-486341 - DSD BR CM 121 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen and the Notice of Action Option is: Braille Documents OR Audio CD OR Data CD	Set NOA Delivery to selected Notice of Action Option to generate and mail NOAs. AND Maintain standard generation and mailing of PDF NOAs.
122	20770	 CI-486342 - DSD BR CM 122 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen, and the Notice of Action Option has been selected as Large Font NOA.	Set NOA Delivery to selected Notice of Action Option for generation and mailing of NOAs.
123	20770	 CI-486343 - DSD BR CM 123 IMPLEMENTED	BVI Recipient Targeted Mailing	BVI Notification Mass Mailing Implementation.	<p>Flag and send to Vendor Print Center for printing and mailing Recipients identified by IHSS Aid Code [Blind SSI/SSP, or Blind IHSS] or Medi-Cal Aid Code [20, 24, 26, 27, 2E, 2H, or 6A] as blind, with a Case Status of one of the following:</p> <ul style="list-style-type: none"> • Pending • Eligible • Presumptive Eligible <p>OR</p> <ul style="list-style-type: none"> • Leave <p>Determine written language for mailing insert:</p> <ul style="list-style-type: none"> • If the Recipient's Written Language is Spanish, mailing insert should be Spanish Language. • Else, if the Recipient's Written Language is Chinese, mailing insert should be Chinese Language. • Else, if the Recipient's Written Language is Armenian, mailing insert should be Armenian Language. • Else, all other written languages print in English. <p>The mailing to the Recipient includes the following items:</p> <ul style="list-style-type: none"> • Address sheet includes the Recipient's or Recipient Designee's Mailing address, and the return address of the County/District Office of the case at the time of mailing. • BVI Functionality Introduction Letter • GEN 1365
124		 CI-486344 - DSD BR CM 124 CANCELLED	Cancelled by C R115 CGI M&O – PSR – EVV Simplification		

125	12264	CI-489622 - DSD BR CM 125 IMPLEMENTED	Rescind Case when there are associated Companion Cases	When the Rescind Case action processes AND <ul style="list-style-type: none">The terminated case has associated Companion Cases AND <ul style="list-style-type: none">The following error message is triggered: "All Companion Cases associated with this case must have either Pending Evidence or Active Evidence with an IHSS Determination Date within one business day of current date when any Companion Case Protective Supervision Proration = Yes. Please update case evidence as needed."	Change the Save link to a Continue link. AND Display the informational message "There are associated Protective Supervision Companion Cases. When Rescind action is processed you will need process an assessment against all cases in the Companion Case collection to ensure the Protective Supervision proration is correct on all cases."
126	12264	CI-489623 - DSD BR CM 126 IMPLEMENTED	Rescind Case when there are associated Companion Cases	When the Continue link is selected on the Rescind Case screen AND The following informational message has displayed: "There are associated Protective Supervision Companion Cases. When Rescind action is processed you will need update all cases in the Companion Case selection to ensure the Protective Supervision proration is correct on all cases."	Allow the rescind action on the terminated case.
127	20782	CI-489624 - DSD BR CM 127 IMPLEMENTED	Reactivate Case - Case Status Changes from Terminated to Pending	When the Save link is selected on the New Application (Reactive Case) screen AND The previous Status is Terminated AND The Referral Date indicated on the Reactivate Case Screen is equal to the Terminated From date.	Allow the action: <ul style="list-style-type: none">Supersede Terminated Assessment, Authorization, and Modes of ServiceSupersede the Terminated Status History record.Set the Pending Status From date to the Referral Date indicated on the Reactivate Case screen.Set the Case Status to Pending.
128	20782	CI-489625 - DSD BR CM 128 IMPLEMENTED	Reactivate Case - Case Status Changes from Application Withdrawn to Pending	When the Save link is selected on the Reactivate Case screen AND The previous Status is Application Withdrawn AND The Referral Date indicated on the Reactivate Case Screen is a date prior to the Application Withdrawn From date.	Allow the action: <ul style="list-style-type: none">Supersede all Assessment Type Initial (Authorization End date of 12/31/9999), Authorization, and Modes of Service with an Authorization Start Date on or after the IHSS Referral Date.Supersede the Application Withdrawn Status History record.Set the current Case Status to Pending.Set the Pending Status From date to the Referral Date indicated on the Reactivate Case screen.Change the To date on the previous Status History record to one day before the Referral Date indicated on the Reactivate Case screen.
129	12264	CI-489626 - DSD BR CM 129 IMPLEMENTED	Rescind Denied Case – Status History Update	When the Save link is selected on the Rescind Case screen AND The case status is Denied.	Update Status History as follows: <ul style="list-style-type: none">Supersede Denied Status History segment.Set the Case Status to Pending.Set the Pending Status To date to blank.
130	12264	CI-489627 - DSD BR CM 130 IMPLEMENTED	Rescind Terminated Case – Status History Update	When the Save link is selected on the Rescind Case screen AND The case status is Terminated.	Update Status History as follows: <ul style="list-style-type: none">Supersede Terminated Status History segment.Set the To date on the status prior to Terminated to blank.

No	Req ID	CI	Description	When	Action
131	20782	CI-489628 - DSD BR CM 131 IMPLEMENTED	New Application (Reactive) Denied Case – Status History Update	When the Save link is selected on the Reactivate Case screen and previous case status was Denied	Update Status History as follows: <ul style="list-style-type: none">Set Denied segment "To" date to one day prior to the Referral Date indicated on the Reactivate Case screenCreate Pending Status History segment setting "From" date equal to Referral Date indicated on the Reactivate Case screen
132	20782	CI-489629 - DSD BR CM 132 IMPLEMENTED	New Application (Reactive) Terminated Case – Status History Update	When the Save link is selected on the Reactivate Case screen and the case status is Terminated	Update Status History as follows: <ul style="list-style-type: none">Set Terminated segment "To" date to one day prior to the Referral Date indicated on the Reactivate Case screenCreate Pending Status History segment setting "From" date equal to Referral Date indicated on the Reactivate Case screen

133	12264	CI-489630 - DSD BR CM 133 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case screen and the Active Evidence prior to Termination had one or more Assessments with an Authorization Start Date future to the Terminate Case Authorization End Date	Process Rescind case action: <ul style="list-style-type: none">• Set Authorization Start Date to Authorization Start Date prior to Termination• Set Authorization End Date to Authorization End Date prior to Termination• Populate TR18 NOA with the Funding Source associate with the assessment period that contained the termination• Reinstate the Assessments with the Authorization Start Date which was future to the termination date.
134	16940	CI-489631 - DSD BR CM 134 IMPLEMENTED	Terminate Leave Status Case	When the Save link is selected on the Terminate case screen the current case status is Leave and any of the following error messages are triggered: <ul style="list-style-type: none">• Authorization may not span Wage Rate MM/DD /YYYY• Authorization Period may not span FFP Change MM/DD/YYYY• Authorization Period may not span LMA MM/DD /YYYY• Authorization Period may not span CFCO Funding Source MM/DD/YYYY• Authorization Period may not span COLA MM/DD /YYYY• Authorization Period may not span State Mandated Change MM/DD/YYYY	Bypass the edit and allow Terminate Case action.
135	12007 16970	CI-489632 - DSD BR CM 135 IMPLEMENTED	Update Funding Source	When the Save link is selected on the Assign Case Provider or the Create Provider Hours screen <ul style="list-style-type: none">• And the Relationship to the Recipient is Parent of a Minor Child or Spouse• And the Begin Date is before a "Not Eligible" authorization segment on the Recipient case• And the current authorization Funding Source is PCSP	Allow the action and trigger the Funding Source Update for the first full calendar month after the "Not Eligible" authorization segment for which payment has not been made. **Period prior to "Not Eligible" period will not have Funding Source Update applied.
136	12007 16970	CI-489633 - DSD BR CM 136 IMPLEMENTED	Update Funding Source when Relationship to Recipient changes from Parent of Minor Child to Parent of an Adult Child	When the Save link is selected on the Modify Case Provider screen and the Relationship has changed from "Parent of a Minor Child" to "Parent of an Adult Child"	If payments have been issued for any period after the Relationship Start Date, do not process Update Funding Source <ul style="list-style-type: none">• Else, if current Funding Source is IHSS-R or CFCO, do not update Funding Source update. (Funding Source remains IHSS-R or CFCO)• Else, if previous Funding Source is IPO5 and the case has either of the following, Restaurant Meals and/or a Provider with the Relationship to the Recipient of Spouse, no Update Funding Source action required (Funding Source remains IPO5)• Else, if Funding Source is IPO5 and the case has only one of the following, Restaurant Meals or a Provider with the Relationship to the Recipient of Spouse, process Update Funding Source to change Funding Source from IPO5 to IPO2 or IPO4• Else, if Funding Source is IPO3 If current case Authorization End Date is more than one day prior to the Provider Relationship Status Date, build missing period. Do not trigger NOA Else, create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date. <ul style="list-style-type: none">• Set Authorization Start Date equal to the Relationship Status Date• Set the Authorization End Date to the Authorization End Date of the previous assessment, if that date is in a month future to the current month, in which the action is being taken Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) Process Final Determination producing applicable NOA (Changes Funding Source from IPO5 to IPO2). <ul style="list-style-type: none">• Else, Funding Source is IPO3 process Update Funding Source to change Funding Sources to PCSP (Changes Funding Source from IPO3 to PCSP)• Else, create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.<ul style="list-style-type: none">◦ Set Authorization Start Date equal to the Relationship Status Date◦ Set the Authorization End Date to the Authorization End Date of the previous assessment, if that date is in a month future to the current month, in which the action is being taken• Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility)• Process Final Determination producing applicable NOA (Changes Funding Source from IPO3 to PCSP).

137	16215	 CI-489634 - DSD BR CM 137 IMPLEMENTED	Update Funding Source	<p>When the Save link is selected on the Assign Case Provider screen and the Relationship to the Recipient is "Parent of a Minor Child"</p> <p>And the Begin and End date are before the 1st day of the Recipients 18th birth month</p>	<p>If payments have been issued for any period after the indicated End Date, do not process Update Funding Source</p> <ul style="list-style-type: none"> Else, if Funding Source on case is CFCO, IHSS-R, or IPO5 do not process Update Funding Source Else, if no payments have been issued on the case after the indicated End Date, and the Funding Source is PCSP, IPO2 or IPO4 process update Funding Source to change to IPO3 or IPO5 If current case Authorization End Date is more than one day prior to the 1st day of the Recipients birth month, Build missing period for the period from current case Authorization End Date to the last day of the month prior to the month in which the Recipient turns 18. Do not trigger NOA <p>Else, create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.</p> <ul style="list-style-type: none"> Set Authorization Start Date equal to the Provider Begin Date Set the Authorization End Date to the last date of the month prior to the month in which the Recipient turns 18. Process Final Determination producing applicable NOA (Changes Funding Source from PCPS, IPO2 or IPO4 to IPO3 or IPO5.
138	12103	 CI-489635 - DSD BR CM 138 IMPLEMENTED	MEDS Daily Update	<p>When a MEDS Daily Update record is received and Medi-Cal Share of Cost is indicated</p> <ul style="list-style-type: none"> And the CIN on the MEDS Daily Update record received equals the most current CIN found in CMIPS And the current Medi-Cal Share of Cost is not equal the previous Medi-Cal Share of Cost And the Case Status is Pending, Eligible, Presumptive Eligible or Leave 	Trigger the "Change in Medi-Cal Share of Cost" task once regardless of the number of MEDS Eligibility records received
139	12264	 CI-489636 - DSD BR CM 139 IMPLEMENTED	Rescind Termination Reason Recipient Death (TR17)	<p>When the Save link is selected on the "Rescind Case" screen and the CIN Search results in "No Active Medi-Cal"</p> <ul style="list-style-type: none"> And the Case Status was Terminated And the Termination Reason was Recipient Death (TR17) 	<ul style="list-style-type: none"> Set the Case Status to status prior to Termination Create MEDS Eligibility records to fill the gap between the last MEDS Eligibility record on the case and the current calendar month as follows: <ul style="list-style-type: none"> ELIGIBILITY MONTH – "Month/Year" for each missing month LAST UPDATED – Current Date RECORD TYPE = No MEDS Eligibility MEDI-CAL ELIGIBILITY STATUS = 909 FFP = N BIC ISSUE DATE – Same as BIC Issue Date on prior MEDS Eligibility Month record CIN = Same as CIN + Check Digit on prior MEDS Eligibility Month record MEDI-CAL DATE OF BIRTH – Same as Medi-Cal Date of Birth on prior MEDS Eligibility Month record MEDI-CAL COUNTY ID – Same as the Medi-Cal County ID on prior MEDS Eligibility Month record All other data elements will default to blank Do not trigger any SAWS or MEDS transactions
140	12623	 CI-489637 - DSD BR CM 140 IMPLEMENTED	Update Provider Paid Hours with updated WPCS hours	<p>When the Save link is selected on the Modify WPCS Hours screen and the WPCS Hours have been modified (increase or decrease)</p>	<ul style="list-style-type: none"> Update the WPCS Hours on the Paid Hours screen for any affected service month Update the WPCS Provider hours for all Active WPCS Provider

No	Req ID	CI	Description	When	Action
141	20788	 CI-489854 - DSD BR CM 141 IMPLEMENTED	Rescind Case – Task to WPCS Work Queue	<p>When the Save link is selected on the Rescind Case screen and WPCS Hours End Date is equal the Terminate Case Authorization End Date</p>	Trigger Task "Recipient case Rescission" to the WPCS Work Queue.
142	20790	 CI-489855 - DSD BR CM 142 IMPLEMENTED	Trigger Task to WPCS Queue when Recipient MEDS Eligibility is terminated	<p>When the MEDS Monthly Renewal processes and the MEDS Eligibility status in the current month is either begins or ends with a "9" and MEDS Eligibility status in the previous month did not begin or end with a "9" and the case has current WPCS Hours</p>	Trigger a "Medi-Cal Eligibility Termination" Task to the WPCS Work Queue.
143	20789	 CI-489856 - DSD BR CM 143 IMPLEMENTED	Trigger Task to WPCS Work Queue when Medi-Cal Discontinuance (S3) is received from SAWS	<p>When the SAWS Daily Receive is processed and an S3 transaction is received on an IHSS case which has current WPCS Hours</p>	Trigger a "SAWS discontinuance" Task to the WPCS Work Queue

144	12301 20792	CI-489857 - DSD BR CM 144 IMPLEMENTED	Terminate WPCS Hours when Funding Source changes to IHSS-R	When a MEDS Monthly Renewal file is processed and Funding Source is changed from PCSP, IPO or CFCO to IHSS-R because the Recipient Medi-Cal FFP changed from Y to N and the Recipient has current WPCS Hours	If the WPCS Hours segment has an End Date in the future or the system high date (12/31/9999) set the End Date to the last day of the month before the Funding Source changes to IHSS-R. Else, if WPCS Hours has a future dated Begin Date set the WPCS Hours to zero (0) and set the End Date to the system High Date (12/31/9999) <ul style="list-style-type: none">• Terminate any Active or Leave status WPCS Provider as follows:<ul style="list-style-type: none">◦ Set Provider Status to "Terminated"◦ Set Termination Effective Date equal to the Authorization Start Date of the IHSS-R Funding Source◦ Set Termination Reason to "Recipient Not Eligible for WPCS"
145	20791	CI-489858 - DSD BR CM 145 IMPLEMENTED	Rescind Case – Task to Companion Cases	When the Save link is selected on the Rescind Case screen the case is part of a Companion Case Collection, trigger Task "Companion Case Rescission – Authorization Update Required" to all cases which were in Eligible or Presumptive Eligible status prior to the Rescind Action.	Trigger Task "Companion Case Rescission – Authorization Update Required" to all cases in the Companion Case collection which were previously in Eligible or Presumptive Eligible status.
146	20792	CI-489859 - DSD BR CM 146 IMPLEMENTED	Funding Source Update – Task to Companion Cases	When an Update Funding source is processed against any case in a Companion Case Collection, trigger Task "Companion Case – Funding Source Update" to Case Owner to all cases in the Companion Case collection in Eligible or Presumptive Eligible status.	Trigger Task "Companion Case – Funding Source Update" to all cases in the Companion Case collection which are in Eligible or Presumptive Eligible status.
147	20774	CI-489916 - DSD BR CM 147 IMPLEMENTED	Lock Recipient Passcode	When three failed authentication attempts were made using the Telephonic System AND The entered Case Number was identical in all three attempts	Generate Task to contact the Recipient and reset their Passcode to the Timesheet Eligibility Errors Work Queue AND Set Passcode for associated Case Number to 0000.
148			Removed with CR 1183		
149			Removed with CR 1183		

150	20809 20810	CI-500956 - DSD BR CM 150 IMPLEMENTED	Update Status of Braille, Audio, and Textual NOA - Generated	When the case management batch job CMDS876A has completed successfully	<p>Generate PDF files for all braille, audio and textual NOAs Pending Generation or Pending Regeneration</p> <p>AND</p> <p>Update the CONCERNROLECOMMUNICATION. status seen on the View Form and Modify and Inactivate Form screens from "Pending Generation" to "Generated"</p> <p>AND</p> <p>BVINOABRAILLETRIGGER. bviNOAStatus to Generated</p> <p>AND</p> <p>Update CONCERNROLECOMMUNICATION. statusDate to the date the batch job completed</p> <p>AND</p> <p>BVINOABRAILLETRIGGER. bviBrailleFileSendDate to the date the batch job completed</p> <p>AND</p> <p>For non-English NOA forms create a BVIATTACHMENT record</p>
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No	Req ID	CI	Description	When	Action
151	20809 20811	CI-500957 - DSD BR CM 151 IMPLEMENTED	Update Status of Braille, Audio, and Textual NOA – Mailed	<p>When the case management batch job CMDR876B is executed</p> <p>AND NOA Identifier match is found</p> <p>AND the NOA IDENTIFIER for a transaction has STATUS = M</p> <p>AND the transaction is processed without error</p>	<p>Update the BVINOABRAILLETRIGGER. bviNOAStatus to Mailed</p> <p>AND</p> <p>Update the CONCERNROLECOMMUNICATION. status field for the Braille NOA Form from "Generated" to "Mailed" – seen on Forms screens</p> <p>AND</p> <p>Update the BVINOABRAILLETRIGGER. bviBrailleFileMailingDate status date provided in the processed transaction</p> <p>AND</p> <p>Update CONCERNROLECOMMUNICATION. statusDate with the status date provided in the processed transaction</p>
152	20809 20812	CI-500958 - DSD BR CM 152 IMPLEMENTED	Track Braille, Audio and Textual NOA received information	<p>When the case management batch job CMDR876B is executed</p> <p>AND a NOA IDENTIFIER has STATUS = R</p> <p>AND The transaction is processed without error</p>	<p>Update BVINOABRAILLETRIGGER. bviNOAStatus from Generated or Regenerated to Received (not visible on forms screens)</p> <p>AND</p> <p>Update BVINOABRAILLETRIGGER. bviBrailleFileReceiveDate with status date provided in the processed transaction</p>

153	20817 20827	CI-507527 - DSD BR CM 153 IMPLEMENTED	Modify and Inactivate Form – Suppress NOA	When the Modify and Inactivate Form screen is saved and the status is Pending and Suppress NOA is indicated	<ul style="list-style-type: none"> Send NOA through nightly batch to generate NOA PDF If triggered, send Recipient Notification 2271A (SOC 2271A) through batch to generate PDF Do not send NOA or Recipient Notification 2271A for printing Set Status of both NOA and SOC 2271A – Provider Notification 2271A to Suppressed If SOC 2271 – Provider Notification 2271 was triggered, set the Status to "Inactivated" <p>*Current functionality associated with SOC 2271 is to inactive see DSD Section 23 for SOC 2271 specific requirements and status setting.</p>
154	20817	CI-507526 - DSD BR CM 154 IMPLEMENTED	Modify and Inactivate Form – Suppress NOA	When the Modify and Inactivate Form screen is saved AND the BVI NOA cluster Status is Pending Generation with the Option of either Audio CD, Braille or Data CD AND Suppress NOA is indicated	<ul style="list-style-type: none"> Do not send standard PDF NOA to county printer Do not generate the NOA as an unlocked PDF with imbedded fonts for interface CMDS876A Do not generate manifest detail for interface CMDS876A Set Status on BVI format Cluster to Suppressed
155	20816	CI-507529 - DSD BR CM 155 IMPLEMENTED	Modify and Inactivate Form – Reprint in Another Language	When the Modify and Inactivate Form screen is saved AND the Reprint in Another Language cluster is indicated	Generate the NOA in selected language <ul style="list-style-type: none"> Set Status to Pending Reprint Set Status Date to current date Send NOA through nightly batch job (500MINDN) to generate the NOA PDF Send NOA through nightly batch (500WINRN) to print the NOA Update the Status to 'Reprinted' Set Status Date to current date
156	20816	CI-507530 - DSD BR CM 156 IMPLEMENTED	Modify and Inactivate Form – Reprint in Another Language	When the Modify and Inactivate Form screen is saved AND the BVI Notice of Action Option is Audio CD or Data CD AND 'Regenerate' is selected in the BVI NOA cluster AND the Reprint in Another Language cluster is indicated	Generate the NOA in selected language <ul style="list-style-type: none"> Set Status to Pending Reprint Set Status Date to current date Send NOA through nightly batch (500MINDN) to generate the NOA PDF in Reprinted Language Set Status to Reprinted Set Status Date to current date Generate manifest detail for interface CMDS876A Set Status to Regenerated Set Status Date to current date <p>AND IF the standard PDF NOA was generated in Spanish, Chinese, or Armenian</p> <ul style="list-style-type: none"> Then also generate the NOA as an unlocked Spanish, Chinese, or Armenian PDF with imbedded fonts for interface CMDS876A Else also generate NOA as unlocked English PDF with imbedded fonts for interface CMDS876A
157	12455	CI-507532 - DSD BR CM 157 IMPLEMENTED	Modify and Inactivate Form – Update Form History	When the Modify and Inactivate Form screen is saved	<ul style="list-style-type: none"> Populate saved information to the Modify and Inactivate Form screen. Save the previous View Forms data to the Forms History screen.
158	20816	CI-507528 - DSD BR CM 158 IMPLEMENTED	Modify and Inactivate Form – Reprint in Another Language – BVI NOA is Braille	When the Modify and Inactivate Form screen is saved AND the "Status" of the "Correspondence Details" is "Printed" AND the BVI Option is "Braille" AND "Reprint in Another Language" cluster is indicated	<ul style="list-style-type: none"> Regenerate NOA in selected language Set Status to Pending Reprint Set Status Date to current date Do not regenerate the braille NOA Send NOA through nightly batch (500MINDN) to generate the NOA PDF Send NOA through nightly batch (500WINRN) to print the NOA Set Status to Reprinted Set Status Date to current date

159	20817	CI-507533 - DSD BR CM 159 <small>IMPLEMENTED</small>	Notify Supervisor of Suppressed NOA	When batch job (500MINDN) has completed and the resulting NOA has been suppressed	Trigger Notification "[case number] NOA Suppressed" to Case Owner Supervisor.
160	20816	CI-507531 - DSD BR CM 160 <small>IMPLEMENTED</small>	Modify and Inactivate Form screen – Reprint in Another Language cluster display	When the Edit link is selected from the Forms screen the Modify and Inactive Form screen displays	In the "Reprint in Another Language" cluster display the details associated with the most recent "Reprint in Another Language" request.

No	Req ID	CI	Description	When	Action
161	16361	CI-507534 - DSD BR CM 161 <small>IMPLEMENTED</small>	Rescind Case Action	When the Rescind Case action occurs AND An NOA is triggered	CMIPS shall print one (1) copy of the NOA for mailing to the Recipient.
162	16187	CI-507541 - DSD BR CM 162 <small>IMPLEMENTED</small>	Modify State Hearing Status	When the Modify State Hearing screen is saved AND An outcome of Erroneous Entry is indicated	<ul style="list-style-type: none"> Set the State Hearing status to Resolved. Set all fields to be non-editable.
163		CI-510887 - DSD BR CM 163 <small>CANCELLED</small>	Cancelled by CR 024		
164	20827	CI-510888 - DSD BR CM 164 <small>IMPLEMENTED</small>	Recipient Notification 2271A (SOC 2271A) – Rescind Case Action	When the Save link is selected on the Rescind Case screen AND The status changes from Terminated to Eligible or Presumptive Eligible	<p>Trigger the SOC2271A form in languages based upon the following:</p> <ul style="list-style-type: none"> If the recipient written language is English, trigger SOC2271A in the English language. Else if the recipient written language is Spanish, trigger SOC2271A in the Spanish language. Else if the recipient written language is Chinese, trigger SOC2271A in the Chinese language. Else if the recipient written language is Armenian, trigger SOC2271A in the Armenian language. Else the recipients written language is other than English, Spanish, Chinese, or Armenian, trigger SOC2271A in the English language, and include GEN1365(MUL). <p>Populate the following to the SOC 2271A form as follows:</p> <p>Addressee – Right justified, font size 9</p> <ul style="list-style-type: none"> Recipient Name Recipient Mailing Address Recipient Mailing City, State Zip <p>Note: If the recipient has a Guardian or Conservator, mailing should be addressed c/o that person.</p> <p>Case Information – Upper right section of form – All fields right justified, font size 12</p> <ul style="list-style-type: none"> Notification Date – Date Notice is printed. Recipient Name – Case Recipient Name. Recipient Case Number – CMIPS Case Number. Social Worker Name – Case Owner Name. Social Worker Number – Case Owner Worker Number. Social Worker Telephone – Case Owner Office Phone Number. Social Worker Office Address – County District Office Mailing Address. <p>Form Body – All fields are left justified in the space provided, font size 14</p> <ul style="list-style-type: none"> as of (date) – The Authorization Start Date of the most recent active evidence associated with the case status of Eligible or Presumptive Eligible. If the case has a future dated Leave or Terminated segment, do not trigger SOC 2271A. Monthly Authorized Hours – Auth to Purchase after Adjusted Hours associated active evidence. Weekly Authorized Hours – Populate with the Weekly Authorized Hours (Authorization Summary: Weekly Authorized Hours). Save the Recipient Notification (SOC 2271A) as Correspondence for the recipient case in a Pending status, to be printed in the next batch cycle on the CMIPS printer associated with the user who rescinded the case.
165	20853 20862 20 863 20954 21123	CI-637062 - DSD BR CM 165 <small>IMPLEMENTED</small>	Scan Dead Line Tasks– 700JINDN Violation 1 or 2 – County Review Violation Status – Active	When the Violation Count is 1 or 2 AND The County Review Outcome is Pending Review AND The current date is [FLSA Configuration: CountyReviewComplete] days* after the Violation Date *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the County Review Outcome from Pending Review to Upheld. Set the County Reviewer Name to superuser. Update the Violation Status from Pending Review to Active. Set County Review Letter Date to one business day after the batch date. Set the County Review Outcome Date to the batch date. Set the County Review Outcome Entered Date to the batch date. Close all associated Tasks. <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B.</p> <ul style="list-style-type: none"> To Provider, SOC 2257. If IHSS letter or DHCS with IHSS is indicated, also send SOC 2272. Else DHCS with WPCS indicates, also send DHCS 2272. To Recipient, SOC 2257A to all recipients associated with this provider in Active or On-Leave status.

166	20853	CI-637063 - DSD BR CM 166 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN - Violation 1 or 2 – Supervisor Review	When the Violation Count is 1 or 2 AND The Supervisor Review Outcome is Supervisor Review AND The current date is CountySupervisorReviewComplete business days* after the Task Creation Date (database field)	<ul style="list-style-type: none"> Set the Supervisor Review Outcome from Supervisor Review to Approved. Set the Supervisor Name to superuser. Update the Violation Status from Pending Review to Inactive. Set the Supervisor Review Outcome Date to the batch date. Set the Supervisor Review Outcome Entered Date to the batch date. Set Violation Count to blank, or decrement by one. Close all associated Tasks.
167	20853 20927	CI-637064 - DSD BR CM 167 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 1 or 2 – County Dispute Violation Status – Active	When the Violation Count is 1 or 2 AND The County Dispute Outcome is Pending Review AND The current date is CountyDisputeComplete days after the Dispute Filed Date	<ul style="list-style-type: none"> Set the County Dispute Outcome from Pending Review to Upheld. Select all three of the Upheld Dispute Upheld Outcome Reasons. Set County Dispute Letter Date to one business day after the batch date. Set the County Dispute User Name to superuser. Set the County Dispute Outcome Date to the batch date. Set the County Dispute Outcome Entered Date to the batch date. Violation Status remains Active. Do not update the Violation Status Date. Close all associated Tasks. <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B.</p> <ul style="list-style-type: none"> To Provider, either SOC 2280 or DHCS 2280 To Recipient, either SOC 2281 or DHCS 2281 to all recipients associated with this provider in Active or On-Leave status.
168	20853 20885 20886 20941 20942	CI-637065 - DSD BR CM 168 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 1 or 2 Supervisor Dispute Outcome Violation Status - Inactive	When the Violation Count is 1 or 2 AND The Supervisor Dispute Outcome is Supervisor Review AND The current date is CountyDisputeComplete business days* after the Dispute File Date *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the Supervisor Dispute Outcome from Supervisor Review to Approved. Set the Dispute Supervisor Name to superuser. Set the Supervisor Dispute Outcome Date to the batch date. Set Supervisor Dispute Outcome Entered Date to the batch date. Set County Review Letter Date to one business day after the batch date. Update the Violation Status from Active to Inactive. Update Violation Status Date to the batch date. Close all associated Tasks. Set Violation Count to blank (View Overtime Violation). Decrement Violation Count by 1 (Provider Details). <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B.</p> <ul style="list-style-type: none"> To Provider, either SOC 2263, or DHCS 2263. To Recipient, either SOC 2264, or DHCS 2264 to all recipients associated with this provider in Active or On-Leave status.
169	20858	CI-637066 - DSD BR CM 169 IMPLEMENTED	Overtime Violation County Dispute (Generate Dispute Task – 600JINDN) not completed in six (6) business days	When an Overtime Violation has County Dispute Outcome of Pending Review AND Six (6) business days have passed since the Dispute Entered Date	Trigger the task County Dispute Outcome due in four (4) business days [Provider Name] [Provider Number] to the following Work Queues: <ul style="list-style-type: none"> County Overtime Violation Supervisor Overtime Violation
170	20859	CI-637067 - DSD BR CM 170 IMPLEMENTED	Overtime Violation County Dispute (Generate Dispute Task – 600JINDN) not completed in eight (8) business days	When an Overtime Violation has County Dispute Outcome of Pending Review AND Eight (8) business days have passed since the Dispute Entered Date	Trigger the task County Dispute Outcome due in two (2) business days [Provider Name] [Provider Number] to the following Work Queues: <ul style="list-style-type: none"> County Overtime Violation Supervisor Overtime Violation

No	Req ID	CI	Description	When	Action
171	20860	CI-637068 - DSD BR CM 171 IMPLEMENTED	Overtime Violation Supervisor Dispute (Generate Dispute Task – 600JINDN) not completed in eight (8) business days.	When an Overtime Violation has a Supervisor Dispute Outcome of "Supervisor Review" AND eight business days have passed since the "Dispute Entered Date"	Trigger the task "Supervisor Dispute Outcome due in two (2) business days [Provider Name] [Provider Number]" to the Supervisor Overtime Violation Work Queues.
172	20905	CI-675646 - DSD BR CM 172 IMPLEMENTED	Terminate Recipient Case – End Date Recipient Flexible Hours	When the Save link is selected on the Terminate Case screen AND the recipient has a Flexible Hours record AND the Frequency is "On-Going" AND the Flexible Hours status is Active Approved AND the Flexible Hours MONTH YYYY is future to the Terminate Case Authorization Start Date OR the Flexible Hours End Date is the system high date (12/31/9999)	<ul style="list-style-type: none"> IF the "Approved" Flexible Hours record which has a MONTH YYYY which is future to Terminate Case Authorization Start Date, deactivate the Flexible Hours record. ELSE the Flexible Hours End Date is 12/31/9999, set the "Flexible Hours End Date" to the last day of the calendar month associated with the Terminate Case Authorization Start Date (No Cancellation Letter will be triggered when the recipient case is terminated.)

173	20905 20906 20907	 CI-675647 - DSD BR CM 173 IMPLEMENTED	Flexible Hours – One-Time – Approval	<p>When the Save link is selected on the Create or Modify Flexible Hours screen</p> <p>AND the Frequency is One-Time</p> <p>AND the Request Outcome is "Approved"</p>	<p>Set the following:</p> <ul style="list-style-type: none"> • Set the Outcome Letter Date to one business day after the current date • Set the Flexible Hours End Date to the last day of the MONTH YEAR being approved • Set the Flexible Hours record status to "Active – Approved" <p>IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> • SOC 2266 to the Recipient • SOC 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> • DHCS 2266 to the Recipient • DHCS 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
174	20905 20908 20909 20946 20947	 CI-675648 - DSD BR CM 174 IMPLEMENTED	Flexible Hours - Denial	<p>When the Save link is selected on the Create or Modify Flexible Hours screen</p> <p>AND the Frequency is One-Time</p> <p>OR the Frequency is On-Going</p> <p>AND the Request Outcome is any "Denied" reason</p>	<p>Set the following:</p> <ul style="list-style-type: none"> • Set the Outcome Letter Date to one business day after the current date • Set Flexible Hours End Date to the last day of the MONTH YEAR requested • Set the Flexible Hours record status to "Active – Denied" <p>IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> • SOC 2267 to the Recipient • SOC 2267A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> • DHCS 2267 to the Recipient • DHCS 2267A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
175	20905 20910 20911 20948 20949	 CI-675649 - DSD BR CM 175 IMPLEMENTED	Flexible Hours – On-Going – Approval	<p>When the Save link is selected on the Create or Modify Flexible Hours screen</p> <p>AND the Frequency is On-Going</p> <p>AND the Request Outcome is "Approved"</p>	<p>Set the following:</p> <ul style="list-style-type: none"> • Set the Outcome Letter Date to one business day after the current date • Set the Flexible Hours End Date to the system high date (12/31/9999) • Set the Flexible Hours record status to "Active – Approved" <p>IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> • SOC 2268 to the Recipient • SOC 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> • DHCS 2268 to the Recipient • DHCS 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment

176	20905 20912 20913 20950 20951	 CI-675650 - DSD BR CM 176 IMPLEMENTED	User entered Flexible Hours End Date	When the Save link is selected on the Modify Flexible Hours screen AND the Frequency is On-Going AND the Flexible Hours End Date entered by the user is other than 12/31/9999	<ul style="list-style-type: none"> Set the Cancellation Letter Date to one business day following the current date Flexible Hours record status remains "Active – Approved" Retain the user indicated "Flexible Hours End Date" <p>IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> SOC 2269 to the Recipient SOC 2269A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> DHCS 2269 to the Recipient DHCS 2269A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
177	20905	 CI-675651 - DSD BR CM 177 IMPLEMENTED	Recipient Flexible Hours Inactive - Yes	When the Yes link is selected on the Inactivate Recipient Flexible Hours screen	<ul style="list-style-type: none"> Set the Flexible Hours End Date to the current Date. Set Flexible Hours record status to "Inactive"
178	20905	 CI-675652 - DSD BR CM 178 IMPLEMENTED	Recipient Flexible Hours History	When either of the following screens is successfully saved: <ul style="list-style-type: none"> Create Recipient Flexible Hours Modify Recipient Flexible Hours 	<ul style="list-style-type: none"> Allow the save action and push previous field indications except Comments to the Recipient Flexible Hours History screen Set Last Updated Date to the current date Set Last Updated by to the User ID of the user taking the action Comments will be saved, but not tracked in the history.
179	20905 20948 20949	 CI-675653 - DSD BR CM 179 IMPLEMENTED	Create or Modify Flexible Hours	When the Save link is selected from the Create or Modify Flexible Hours screen AND the Frequency is On-Going AND the Outcome is Approved AND an On-Going Flexible Hours segment exists with an End Date after the current Flexible Hours MONTH YYYY	<ul style="list-style-type: none"> Allow the action End Date the future dated On-Going Flexible Hours record with the last day of the month prior to the MONTH YYYY indicated on the current Flexible Hours screen. <p>When Program Type is IHSS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> SOC 2268 to the Recipient SOC 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>When Program Type is WPCS:</p> <ul style="list-style-type: none"> DHCS 2268 to the Recipient DHCS 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment

180	20905 20914 2 0915 20944 20945 20948 20949	CI-675654 - DSD BR CM 180 IMPLEMENTED	Create or Modify Flexible Hours	<p>When the Save link is selected on the Create or Modify Flexible Hours screen</p> <p>AND a Flexible Hours segment exists with a MONTH and YYYY after the current MONTH YYYY request</p> <ul style="list-style-type: none"> Allow the action End Date the current record with the last date of the calendar month prior to the future dated Flexible Hours segment <p>IF the current Flexible Hours segment is for only a one month period</p> <ul style="list-style-type: none"> AND the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer SOC 2266 to the Recipient SOC 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer DHCS 2266 to the Recipient DHCS 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the current Flexible Hours segment is for multiple months</p> <ul style="list-style-type: none"> IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer SOC 2268 to the Recipient SOC 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> DHCS 2268 to the Recipient DHCS 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
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No	Req ID	CI	Description	When	Action
181	20853 20881 20882 20925 20954	CI-706131 - DSD BR CM 181 IMPLEMENTED	<p>Scan Dead Line Tasks– 700JINDN</p> <p>Violation 3 County Review</p> <p>Violation Status – Active</p>	<p>When the Violation Count is 3</p> <p>AND the County Review Outcome is "Pending Review"</p> <p>AND the current date is "[FLSA Configuration: CountyReviewComplete]" days* after the "Violation Date"</p> <p>*Business day count begins the day following the Violation Date.</p>	<ul style="list-style-type: none"> Set the County Review Outcome from "Pending Review" to "Upheld" Set the County Reviewer Name to "superuser" Update the Violation Status from "Pending Review" to "Active" Set County Review Letter Date to one business day after the batch date Set the County Review Outcome Date to the batch date Set the County Review Outcome Entered Date to the batch date Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider SOC 2257 <ul style="list-style-type: none"> If IHSS letter or DHCS with IHSS indicated also send SOC 2272 Else DHCS with WPCS indicates also send DHCS 2272 To Recipient SOC 2257A to all recipient's associated to this provider in "Active" or "On-Leave" status

182	20853 2 0883 20 884 20925 20954	 CI-706130 - DSD BR CM 182 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 4 County Review Violation Status – Active	When the Violation Count is 4 AND the County Review Outcome is "Pending Review" AND the current date is "[FLSA Configuration: CountyReviewComplete]" days* after the "Violation Date" *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the County Review Outcome from "Pending Review" to "Upheld" Set the County Reviewer Name to "superuser" Update the Violation Status from "Pending Review" to "Active" Set County Review Letter Date to one business day after the batch date Set the County Review Outcome Date to the batch date Set the County Review Outcome Entered Date to the batch date Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider SOC 2257 <ul style="list-style-type: none"> If IHSS letter or DHCS with IHSS indicated also send SOC 2272 Else DHCS with WPCS indicates also send DHCS 2272 To Recipient SOC 2257 to all recipient's associated to this provider in "Active" or "On-Leave" status
183	20853 20926 20955 20929 20930	 CI-706128 - DSD BR CM 183 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 3 County Dispute Violation Status – Active	When the Violation Count is 3 AND the County Dispute Outcome is "Pending Review" AND the current date is "CountyDisputeComplete" days after the "Dispute Filed Date"	<ul style="list-style-type: none"> Set the County Dispute Outcome from "Pending Review" to "Upheld" Select all three of the Upheld Dispute Upheld Outcome Reasons Set County Dispute Letter Date to one business day after the batch date Set the County Dispute User Name to "superuser" Set the County Dispute Outcome Date to the batch date Set the County Dispute Outcome Entered Date to the batch date Violation Status remains "Active" Do not update the Violation Status Date Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider either SOC 2282 or DHCS 2282 If IHSS letter or DHCS with IHSS indicated also send SOC 2273 Else DHCS with WPCS indicates also send DHCS 2273 To Recipient either SOC 2283 or DHCS 2283 to all recipient's associated to this provider in "Active" or "On-Leave" status
184	20853 20926 20955 20929 20930	 CI-706129 - DSD BR CM 184 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 4 County Dispute Violation Status – Active	When the Violation Count is 4 AND the County Dispute Outcome is "Pending Review" AND the current date is "CountyDisputeComplete" days after the "Dispute Filed Date"	<ul style="list-style-type: none"> Set the County Dispute Outcome from "Pending Review" to "Upheld" Select all three of the Upheld Dispute Upheld Outcome Reasons Set County Dispute Letter Date to one business day after the batch date Set the County Dispute User Name to "superuser" Set the County Dispute Outcome Date to the batch date Set the County Dispute Outcome Entered Date to the batch date Violation Status remains "Active" Do not update the Violation Status Date Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider either SOC 2284 or DHCS 2284 If IHSS letter or DHCS with IHSS indicated also send SOC 2273 Else DHCS with WPCS indicates also send DHCS 2273 To Recipient either SOC 2285 or DHCS 2285 to all recipient's associated to this provider in "Active" or "On-Leave" status

185	20853 20885 20886 20941 20942	CI-706127 - DSD BR CM 185 IMPLEMENTED	Scan Dead Line Tasks– 700JNDN Violation 3 or 4 Supervisor Dispute Outcome Violation Status - Inactive	When the Violation Count is 3 or 4 AND the Supervisor Dispute Outcome is "Supervisor Review" And the current date is "CountyDisputeComplete" business days* after the "Dispute File Date" *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the Supervisor Dispute Outcome from "Supervisor Review" to "Approved" Set the Dispute Supervisor Name to "superuser" Set the Supervisor Dispute Outcome Date to the batch date Set Supervisor Dispute Outcome Entered Date to the batch date Set County Review Letter Date to one business day after the batch date Update the Violation Status from "Active" to "Inactive" Update Violation Status Date to the batch date Close all associated Tasks Set Violation Count to blank (View Overtime Violation) Decrement Violation Count by 1 (Provider Details) <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider either SOC 2263 or DHCS 2263 To Recipient either SOC 2264 or DHCS 2264 to all recipient's associated to this provider in "Active" or "On-Leave" status
186	20743	CI-710771 - DSD BR CM 186 IMPLEMENTED	Calculate Case Weekly Authorized Hours	When a case assessment is authorized AND the Auth to Purchase after Adjusted Hours either increases or decreases *Increases would include a case status that changes from Pending to Eligible or Presumptive Eligible and hours are authorized (zero to something greater than zero).	Determine the case Weekly Authorized Hours: <ul style="list-style-type: none"> Divide IHSS Auth to Purchase after Adjusted Hours, for a full service month by 4.0 Fractions of minute should be rounded up to the next whole minute
187	16688 1 6691 16 692	CI-718138 - DSD BR CM 187 IMPLEMENTED	UHV Initial Home Visit –Unsuccessful Outcome	When a Create Unannounced Home Visit screen is saved (initial visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Follow-up UHV Attempt cluster on View Unannounced Home Visit Details screen.
188	16688 1 6691 16 692	CI-718139 - DSD BR CM 188 IMPLEMENTED	UHV Initial Home Visit –Unsuccessful Outcome	When a Modify Unannounced Home Visit screen is saved (initial visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Follow-up UHV Attempt cluster on View Unannounced Home Visit Details screen.
189	16688 1 6691 16 692	CI-718140 - DSD BR CM 189 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Letter Inactivate Link	When the Inactivate link is visible on the Follow-up UHV Attempt cluster for the Follow-up Letter And a Follow-up Home Visit Outcome is entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Letter
190	16688 1 6691 16 692	CI-718141 - DSD BR CM 190 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Letter Inactivate Link	When the View Unannounced Home Visit Details screen is displayed And the Follow-up Letter Date has been entered And the current date is one or more days after the Follow-up Letter Date has been entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Letter

No	Req ID	CI	Description	When	Action
191	16688 16691 16692	CI-718142 - DSD BR CM 191 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Phone Call Inactivate Link	When the Inactivate link is visible on the Follow-up UHV Attempt cluster for the Follow-up Phone Call And a Follow-up Home Visit Outcome is entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Phone Call

192	16688 16691 16692	CI-718143 - DSD BR CM 192 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Phone Call Inactivate Link	When the View Unannounced Home Visit Details screen is displayed And the Follow-up Phone Call Date has been entered And the current date is one or more days after the Follow-up Phone Call Date has been entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Phone Call
193	16688 16691 16692	CI-718144 - DSD BR CM 193 IMPLEMENTED	UHV Follow-up Home Visit – Unsuccessful Outcome	When a Create Unannounced Home Visit screen is saved (Follow-up visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Final UHV Attempt cluster on View Unannounced Home Visit Details screen.
194	16688 16691 16692	CI-718145 - DSD BR CM 194 IMPLEMENTED	UHV Follow-up Home Visit – Unsuccessful Outcome	When a Modify Unannounced Home Visit screen is saved (Follow-up visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Final UHV Attempt cluster on View Unannounced Home Visit Details screen.
195	16688 16691 16692	CI-718146 - DSD BR CM 195 IMPLEMENTED	UHV Follow-up Home Visit – Outcome change	When a Modify Unannounced Home Visit screen is saved (Follow-up visit) And the Outcome is changed from 'Entry Denied', 'Uncooperative', 'Contact Made' or 'Not Available' And the new Outcome is 'Completed', 'Follow-up Required', 'Fraud Referral' or 'Reassessment Required' And the Final Phone Call Date has not been entered	Delete the Final UHV Attempt cluster and display the Unannounced Home Visit Details Screen.
196	16688 16691 16692	CI-718147 - DSD BR CM 196 IMPLEMENTED	UHV Final Home Visit – Final Phone Call Inactivate Link	When the Inactivate link is visible on the Final UHV Attempt cluster for the Final Phone Call And a Final Home Visit Outcome is entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Final UHV Attempt cluster for the Final Phone Call
197	16688 16691 16692	CI-718148 - DSD BR CM 197 IMPLEMENTED	UHV Final Home Visit – Final Phone Call Inactivate Link	When the View Unannounced Home Visit Details screen is displayed And a Final Visit Outcome has not been entered And the Final Phone Call Date has been entered And the current date is one or more days after the Final Phone Call Date has been entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Final UHV Attempt cluster for the Final Phone Call
198	16688 16691 16692	CI-718149 - DSD BR CM 198 IMPLEMENTED	UHV Final Home Visit – Unsuccessful Outcome	When a Create Unannounced Home Visit screen is saved (Final visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Trigger Task “[case name] [case number]: Recipient is at risk for termination due to non-compliance with Unannounced Home Visit. Contact county QA staff.”

199	16688 16691 16692	CI-718150 - DSD BR CM 199 <small>IMPLEMENTED</small>	UHV Final Home Visit – Unsuccessful Outcome	When a Modify Unannounced Home Visit screen is saved (Final visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Trigger Task “[case name] [case number]: Recipient is at risk for termination due to non-compliance with Unannounced Home Visit. Contact county QA staff.”
200	16688 16691 16692	CI-718151 - DSD BR CM 200 <small>IMPLEMENTED</small>	Terminate Case for UHV non-compliance	When Terminate Case screen is saved and the reason is 'Non-Compliance - Unannounced Home Visit'	Terminate case Generate Termination notice with TR23

No	Req ID	CI	Description	When	Action
201	20996 20997	CI-719089 - DSD BR CM 201 <small>IMPLEMENTED</small>	Violation Count 3 or 4 State Review Outcome is Pending Override	When batch job 600RINDN runs AND the State Review Outcome is "Pending Override"	On the View Overtime Violation screen: <ul style="list-style-type: none">Update the State Review Outcome from "Pending Override" to "Override"Set the State Review User Name to the user taking the actionSet the State Review Entered Date to the batch dateSet the State Review Manage and State Review Outcome cluster fields to View OnlySet the State Supervisor Review Outcome to "Supervisor Review"
202	20996 20997	CI-719090 - DSD BR CM 202 <small>IMPLEMENTED</small>	Violation Count 3 or 4 State Supervisor Review Outcome is "Supervisor Review"	When batch job 600RINDN runs AND the Violation Count is 3 or 4 AND the current date is "[FLSA Configuration:StateReviewComplete]" days* after the "State Review Entered Date" AND the State Supervisor Review Outcome is "Supervisor Review"	On the View Overtime Violation screen: <ul style="list-style-type: none">Set the Violation Status Date to the batch dateUpdate the Violation Status from "Active" to "Inactive"Update the State Supervisor Review Outcome from "Supervisor Review" to "Approved"Set the State Supervisor Review Outcome Entered Date to the batch dateSet the State Supervisor Review Outcome Date to the batch dateSet the State Supervisor Review User Name to "superuser"Set the State Review Letter Date to one business day following the batch dateSet all State Supervisor Review fields "View Only" Letter Trigger Conditions: IF the Program Type associated to the Overtime Violation is IHSS and the provider serves only IHSS services, to all recipient(s) in "Eligible", "Presumptive Eligible" or "Leave" status <ul style="list-style-type: none">For Violation Count 3 or 4Trigger SOC 2288 to IHSS ProviderTrigger SOC 2289 to all recipient's associated to this provider in "Active" or "On-Leave" status. ELSE IF, and the provider serves both IHSS and WPCS to a recipient and the Program Type of the violation is IHSS <ul style="list-style-type: none">If Violation Count is 3 or 4Trigger DHCS 2288 to IHSS Provider with IHSS checkedTrigger DHCS 2289, with IHSS checked, to all recipient's associated to this provider in "Active" or "On-Leave" status ELSE, the provider serves only WPCS to a WPCS recipient and the Program Type of the violation is WPCS <ul style="list-style-type: none">Trigger DHCS 2288 to WPCS Provider with WPCS checkedTrigger DHCS 2289, with WPCS checked, to all recipient's associated to this provider in "Active" or "On-Leave" status
203	20996 20997	CI-719091 - DSD BR CM 203 <small>IMPLEMENTED</small>	Batch – 600RINDN Any Violation County CDSS Review Outcome – Pending Violation Status – Active	When batch job 600RINDN runs AND the Violation Count is any violation AND the current date is "[FLSA Configuration:CDSSReviewComplete]" days* after the "CDSS Review Entered Date" AND the CDSS Review Outcome is "Pending" *Business day count begins the day following the CDSS Review Filed Entered Date.	On the View Overtime Violation Screen: <ul style="list-style-type: none">Violation Status remains "Active"Retain the Status DateRetain the Next Possible Violation Date On the View Overtime Violation – CDSS Review screen: <ul style="list-style-type: none">Set the CDSS Review Outcome from "Pending" to "Upheld"Set the CDSS Review Outcome Date to the batch dateOverride Reason remains blankSelect "Upheld" check box to match CDSS Review indication (i.e. Unanticipated Need, Health and Safety Issue, or Immediate Need)Set the CDSS Reviewer Name to "superuser"Set the CDSS Review Outcome Entered Date to the batch dateSet all CDSS Review fields, except CDSS Letter Date to "View Only"

204	20996 20997	 204 IMPLEMENTED	<p>Batch 600RINDN</p> <p>Any Violation Count</p> <p>CDSS Supervisor Review Outcome – Supervisor Review</p> <p>Violation Status – Inactive</p>	<p>When Batch Job 600RINDN processes</p> <p>AND the current date is “[FLSA Configuration:CDSSReviewComplete]” days after the “CDSS Review Entered Date”</p> <p>AND the CDSS Supervisor Review Outcome is “Supervisor Review”</p>	<ul style="list-style-type: none"> • On the View Overtime Violation screen: • Update the Violation Status from “Active” to “Inactive” • Set Violation Status Date to the batch date • Retain Next Possible Violation Date • Change the “Current Provider Violation Count” to blank • Decrement Violation Count by 1 until zero (Provider Details) • On the View Overtime Violation – CDSS Review screen: • Update the CDSS Supervisor Review Outcome from “Supervisor Review” to “Approved” • Set CDSS Supervisor Review Outcome Date to the batch date • Set CDSS Supervisor Review User Name to “superuser” • Set CDSS Supervisor Review Outcome Entered Date to batch date • Set CDSS Review Letter Date to one business day after the batch date • Set CDSS Review Letter Entered Date to the batch date • Set all CDSS Supervisor Review fields to “View Only” • Letter Triggers: <ul style="list-style-type: none"> • Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B • To Provider either SOC 2263 or DHCS 2263 • To Recipient either SOC 2264 or DHCS 2264 to all recipient's associated to this provider in “Active” or “On-Leave” status • Update Provider Eligibility • Regardless of the Violation Count: <ul style="list-style-type: none"> • IF provider is Terminated • AND the “Ineligible Reason” prior to termination was Tier 2 Conviction • OR Subsequent Tier 2 Conviction • Eligible field remains “No” • ELSE Termination Reason is • Third Overtime Violation • OR Fourth Overtime Violation • Update the Eligible field from “No” to “Yes” • Clear the Ineligible Reason • All other Enrollment settings remain as indicated prior to the ineligible action • On the Provider Details screen update the Ineligible Begin Date and Ineligible End Date to blank • Update Provider Ineligible Dates • On the View Overtime Violation record update the Ineligible Begin Date and Ineligible End Date to blank saving previous dates to history.
205	20996 20997	 205 IMPLEMENTED	<p>Batch 600RINDN</p> <p>Any Violation Count</p> <p>CDSS Supervisor Review Outcome – Pending Rejection</p> <p>Violation Status – Active</p>	<p>When Batch Job 600RINDN processes</p> <p>AND the CDSS Supervisor Review Outcome is “Pending Rejection”</p>	<p>One the View Overtime Violation Screen:</p> <ul style="list-style-type: none"> • Violation Status remains “Active” • Retain the Status Date • Retain the Next Possible Violation Date <p>On the View Overtime Violation – CDSS Review screen:</p> <ul style="list-style-type: none"> • Set the CDSS Supervisor Review Outcome from “Pending Rejection” to “Rejected” • Set the CDSS Supervisor Reviewer User Name to user taking action • Set the CDSS Supervisor Review Outcome Entered Date to the batch date • If CDSS Letter Date is blank, set all CDSS Supervisor Review fields, except CDSS Letter Date to “View Only” • Else, CDSS Letter Date is indicated set all CDSS Supervisor Review fields to “View Only”.
206	20996 20997	 206 IMPLEMENTED	<p>Batch 600RINDN</p> <p>Any Violation Count</p> <p>CDSS Review Outcome is “Pending Override”</p>	<p>When batch job 600RINDN runs</p> <p>AND the CDSS Review Outcome is “Pending Override”</p>	<p>On the View Overtime Violation – CDSS Review screen:</p> <ul style="list-style-type: none"> • Update the CDSS Review Outcome from “Pending Override” to “Override” • Set the CDSS Review User Name to the user taking the action • Set the CDSS Review Outcome Entered Date to the batch date • Set all the CDSS Review and CDSS Review Outcome cluster fields to View Only • Set the CDSS Supervisor Review Outcome to “Supervisor Review”

207	20996 20997	CI-719088 - DSD BR CM 207 IMPLEMENTED	<p>Batch 600RINDN Violation #3 or 4 State Supervisor Review Outcome – Pending Rejection Violation Status – Active</p>	<p>When Batch Job 600RINDN processes AND the State Supervisor Review Outcome is "Pending Rejection"</p> <p>On the View Overtime Violation Screen:</p> <ul style="list-style-type: none"> Violation Status remains "Active" Retain the Status Date <p>On the State Supervisor Review cluster:</p> <ul style="list-style-type: none"> Set the State Supervisor Review Outcome from "Pending Rejection" to "Rejected" Set the State Supervisor User Name to user taking action Set the State Supervisor Review Outcome Entered Date to the batch date Set all State Supervisor Review fields to "View Only" <p>Set Ineligible Dates</p> <ul style="list-style-type: none"> Set Ineligible Begin Date to current date plus "FLSAConfig:ProviderTermination" days (Field validation on both View Provider Details and current View Overtime Violation) Set Ineligible End Date as follows: <ul style="list-style-type: none"> IF Violation Count is 3 set the Ineligible End Date to the Ineligible Begin Date plus "FLSA:Config:ThirdViolation>IneligiblePeriod" days (Field validation on both View Provider Details and current View Overtime Violation) <ul style="list-style-type: none"> ELSE Violation Count is 4 set the Ineligible End Date to the Ineligible Begin Date plus "FLSA:Config:FourthViolation>IneligiblePeriod" days (Field validation on both View Provider Details and current View Overtime Violation) <p>Terminate Provider Hours as follows:</p> <ul style="list-style-type: none"> Create Leave/Terminate Provider Hours segment <ul style="list-style-type: none"> Set Provider Status to "Terminated" IF Violation Count is 3 set Termination Reason to "Third Overtime Violation" <ul style="list-style-type: none"> ELSE Violation Count is 4 set Termination Reason to "Fourth Overtime Violation" If the most recent Provider Hours segment has an End Date less than "FLSAConfig:ProviderTermination" calendar days from the current date <ul style="list-style-type: none"> Set the Termination Effective Date to the current End Date plus one day (+1) Else set the Termination Effective Date to current date plus "FLSAConfig:ProviderTermination" calendar days <p>Set Provider Eligible to "No" as follows:</p> <ul style="list-style-type: none"> Create Modify Enrollment with the following data: <ul style="list-style-type: none"> Set the Eligible field to "No". Set the Effective Date to "FLSAConfig:ProviderTermination" days from the current date. Set the Ineligible Reason as follows: <ul style="list-style-type: none"> IF Violation Count is 3 "Third Overtime Violation" <ul style="list-style-type: none"> ELSE Violation Count is 4 "Fourth Overtime Violation" <p>Set Next Possible Violation Date</p> <ul style="list-style-type: none"> IF the batch date is in the same calendar month as the Violation Date, set the Next Possible Violation Date to the first day of the next calendar month ELSE, if the batch date is in a subsequent calendar month, set the Next Possible Violation Date to the first day of the next pay period <p>Recipient CORI: Do not End the Recipient CORI record</p> <p>Trigger Task/Notifications as follows:</p> <ul style="list-style-type: none"> Notification to Case Owner "[Provider Name] Ineligible for [Provider Ineligible Reason]." Notification to Case Owner Supervisor "[Provider Name] Ineligible for [Provider Ineligible Reason]." Task to the Public Authority Work Queue "[Provider Name] Ineligible for [Provider Ineligible Reason]." If the Provider is a WPCS trigger task to WPCS Work Queue, trigger Task "[Provider Name] Ineligible for [Provider Ineligible Reason]." <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> IF Violation Count is three (3), issue <ul style="list-style-type: none"> To Provider either SOC 2286 or DHCS 2286 To Recipient either SOC 2287 or DHCS 2287 to all recipient's associated to this provider in "Active" or "On-Leave" status ELSE Violation Count is four (4), issue <ul style="list-style-type: none"> To Provider either SOC 2290 or DHCS 2290 To Recipient either SOC 2291 or DHCS 2291 to all recipient's associated to this provider in "Active" or "On-Leave" status
208		CI-753370 - DSD BR CM 208 CANCELLED	Cancelled by ASR Sprint 11 Team 1&2	
209		CI-753369 - DSD BR CM 209 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification	
210		CI-753368 - DSD BR CM 210 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification	

No	Req ID	CI	Description	When	Action
211		CI-753371 - DSD BR CM 211 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		

212		CI-753372 - DSD BR CM 212 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
213		CI-753374 - DSD BR CM 213 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
214		CI-753375 - DSD BR CM 214 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
215		CI-753373 - DSD BR CM 215 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
216	21045	CI-753913 - DSD BR CM 216 IMPLEMENTED	Terminate Case – End Date Provider Overtime Violation Exemption	When the Save link is selected on the Termination Case screen AND the case is associated with an "Active" Overtime Violation Exemption with an End Date which extends beyond the Terminate Case Authorization End Date	Set flag for Batch Job 600TINDN) When nightly Batch Job (600TINDN) processes End Date* the Overtime Violation Exemption with the Terminate Case Authorization End Date AND for all records hide the "Edit" and "Inactivate" links *Bypass Error Message 413 (717,651)
217	16661 16 850	CI-753914 - DSD BR CM 217 IMPLEMENTED	Cost of Living Adjustment Processing – Social Security Percentage Increase and Benefit Level Increase/Decrease	Processes when a Cost of Living Adjustment is ordered to increase the clients Social Security Percentage and the Benefit Level is either increased or decreased.	Update CMIPS Wage Rate Table: Deductions Code Table with the increased Social Security Percentage and the Benefit Level table with the (increase or decrease amounts) only for CMIPS cases with: <ul style="list-style-type: none"> • a Case Status of Eligible or Presumptive Eligible • and the IHSS Aid Code is 18, 28 or 68 • And the Income Source is Retirement, Survivors, Disability Insurance (RSDI) – Recipient <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. • If the current Authorization End Date is prior to the [Benefit Level Effective Date] <ul style="list-style-type: none"> ◦ Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ▪ Set Program Evidence Authorization Start Date to one day after previous Authorization End Date ▪ Set Program Evidence Authorization End Date to one day before [Benefit Level Effective Date] and process Final Determination – Suppress NOA ◦ Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ▪ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ▪ Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence as follows: <ul style="list-style-type: none"> • If previous IHSS SOC is less than current IHSS SOC trigger NOA SC03 • If previous IHSS SOC is greater than current IHSS SOC produce NOA SC06 • If previous IHSS SOC is equal to current IHSS SOC do not trigger any NOA • Case will be reported on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH • If the current Authorization End Date is on or after the [Benefit Level Effective Date] <ul style="list-style-type: none"> ◦ Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ▪ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ▪ Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA as follows: <ul style="list-style-type: none"> • If previous IHSS SOC is less than current IHSS SOC trigger NOA SC03 • If previous IHSS SOC is greater than current IHSS SOC produce NOA SC06 • If previous IHSS SOC is equal to current IHSS SOC do not trigger any NOA • If the Income Evidence indicates SOCIS002 report case on SOC COLA WARNING REPORT – VET ADMIN BENEFIT CODE 2
218		CI-766266 - DSD BR CM 218 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
219		CI-775177 - DSD BR CM 219 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
220		CI-775178 - DSD BR CM 220 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		

No	Req ID	CI	Description	When	Action
221		 CI-775179 - DSD BR CM 221 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
222		 CI-775180 - DSD BR CM 222 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
223	16878 21071 21072 21073	 CI-775237 - DSD BR CM 223 IMPLEMENTED	Terminate Case Termination Health Care Certification – No Need (TR24)	When the Save link is selected on the Terminate Case screen AND The Health Care Certification Documentation Type field indication is "No Need" AND The Termination Reason is Health Care Certification – No Need	Allow the case termination Trigger NOA TR24 – Health Care Certification – No Need
224	16878 21071 21072 21073	 CI-775238 - DSD BR CM 224 IMPLEMENTED	Rescind Case Retain all previously indicated Health Care Certification information	When the Save link is selected on the Rescind Case screen AND The Denial or Termination Reason was any of the following: <ul style="list-style-type: none">• DN22• DN23• TR22• TR24	Allow the Rescind action Retain all previous Health Care Certification field indications except Documentation Received Date and Documentation Type which are set to blank.
225	16878 21071 21072 21073	 CI-775239 - DSD BR CM 225 IMPLEMENTED	Trigger "Health Care Certification Task"	When the current date is one business day before: The Health Care Certification "Due Date" OR If indicated, the "Health Care Certification Extension Due Date"	Trigger task, "[case name] [case number] Health Care Certification due."
226	16878 21071 21072 21073	 CI-775240 - DSD BR CM 226 IMPLEMENTED	Trigger "Health Care Certification Task"	When the current date is ten calendar days before either the: Health Care Certification "Due Date" OR If indicated, the "Health Care Certification Extension Due Date"	Trigger task, "[case name] [case number] Health Care Certification due in 10 days."

227	21004	CI-795502 - DSD BR CM 227 IMPLEMENTED	Inactivate Recipient IHSS ESP Registration	When the county selects "Yes" on the Inactivate Recipient IHSS ESP Registration pop-up	<p>IF</p> <p>IHSS ESP registration record does exist under Recipient Case Number</p> <p>THEN</p> <p>Place message "recipientInactivation" on the message broker queue</p> <p>AND</p> <p>Create history snapshot for the ESP Registration record</p> <p>AND</p> <p>Create new Registration record with 'Inactive' status</p> <p>AND</p> <p>Create paper letter SOC 2321 to recipient, in recipient written threshold language, on county printer</p> <p>AND</p> <p>Make SOC 2321 pdf available on the Forms and Correspondence screen</p> <p>ELSE IF</p> <p>IHSS ESP registration record does not exist under Recipient Case Number</p> <p>THEN</p> <p>Create new Registration record with 'Inactive' status</p> <p>AND</p> <p>Create paper letter SOC 2321 to recipient, in recipient written threshold language, on county printer</p> <p>AND</p> <p>Make SOC 2321 pdf available on the Forms and Correspondence screen</p> <p>AND IF</p> <p>Recipient is not registered for TTS</p> <p>THEN</p> <p>For Providers of Recipient:</p> <p>IF</p> <p>CaseProviderEVVDetails.isETS = True</p> <p>THEN</p> <p>Update CaseProviderEVVDetails.isETS = False</p>
228	21161	CI-795503 - DSD BR CM 228 IMPLEMENTED	Reactivate Recipient IHSS ESP Registration	When the county selects "Yes" on the Reactivate Recipient IHSS ESP Registration pop-up	<p>IHSS ESP registration does not exist under Recipient Case Number</p> <p>Place message "recipientreactivation" on the message broker queue</p> <p>AND</p> <p>Create history snapshot for this Registration record</p> <p>AND</p> <p>Create new Registration record with 'Reactivated' status</p> <p>AND</p> <p>Delete records if any in UserFailedAttempts and UserLastLogin tables</p> <p>ELSE</p> <p>Create new Registration record with 'Reactivated' status</p>
229	16940 16941	CI-813518 - DSD BR CM 229 IMPLEMENTED	Terminate/On-Leave Recipient Case	<p>When the Recipient case is terminated or placed on-leave from the case home screen</p> <p>AND</p> <p>There is Pending Provider(s) assigned to the case</p>	Inactivate any pending provider case assignment records.

230	21256	CI-819670 - DSD BR CM 230 IMPLEMENTED	ICT Process Is Completed – End Date Recipient Waiver	WHEN Inter-County Transfer evidence is approved AND The ICT status is updated to "Completed" AND There is a Recipient Waiver with a 12/31/9999 End Date	The Recipient Waiver End Date is set equal to the ICT Authorization Start date with a reason of 'Terminated Provider'
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No	Req ID	CI	Description	When	Action
231	21130	CI-819029 - DSD BR CM 231 IMPLEMENTED	Generate new TTS Registration Code for Recipient	When the Reset Recipient TTS Code Pop-up screen is saved.	<p>The Reset Recipient TTS Code Pop-up screen closes.</p> <p>The Recipient's TTS Registration Code is updated in Case Management.</p> <p>EVVTS Recipient Registration Code Notification (CMIPS 0001) containing the generated registration code for the recipient will be generated on the county printer assigned to the person who triggered the action and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.</p>
232	21130	CI-819030 - DSD BR CM 232 IMPLEMENTED	Generate new TTS Registration Code for Provider	When the Reset Provider TTS Code Pop-up screen is saved.	<p>The Reset Provider TTS Code Pop-up screen closes.</p> <p>The Provider's TTS Registration Code is updated in Case Management.</p> <p>EVVTS Provider Registration Code Notification (CMIPS 0002) containing the generated registration code for the provider will be generated on the county printer assigned to the person who triggered the action and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.</p>
233	21133	CI-819045 - DSD BR CM 233 IMPLEMENTED	Modify Recipient Communication Preference	<p>The Modify Timesheet Communication Preferences Pop-up screen is saved</p> <p>AND</p> <p>The selected a communication preference is with a system in which the recipient is a registered user:</p> <ul style="list-style-type: none"> • Email for ESP • Telephone for TTS <p>OR</p> <p>The selected communication preference is blank and the recipient is not a registered user of either TTS or ESP</p>	<p>The Modify Timesheet Communication Preferences Pop-up screen closes.</p> <p>The recipient's communication preference is saved in Case Management as the new value if a new value was selected.</p>
234	21134	CI-819051 - DSD BR CM 234 IMPLEMENTED	Reset Recipient TTS Passcode	<p>The Reset Recipient TTS Passcode Pop-up screen is saved</p> <p>AND</p> <p>The New Passcode and Confirm Passcode fields contain 4-digit numbers</p> <p>AND</p> <p>The 4-digit numbers in both fields match one another.</p>	<p>Saves the input 4-digit Passcode to CM (if all edits passed)</p> <p>Closes the Reset Recipient TTS Passcode pop-screen and returns to the View Recipient Timesheet Preferences screen</p> <p>If the Passcode Status is currently Locked, then the Passcode Status is set to Unlocked.</p> <p>Update the Recipient Authorization Number if applicable.</p>
235	21134	CI-819060 - DSD BR CM 235 IMPLEMENTED	Reset Provider TTS Passcode	<p>The Reset Provider TTS Passcode Pop-up screen is saved</p> <p>AND</p> <p>The New Passcode and Confirm Passcode fields contain 4-digit numbers</p> <p>AND</p> <p>The 4-digit numbers in both fields match one another.</p>	<p>Saves the input 4-digit Passcode to the database (if all edits passed)</p> <p>Closes the Reset Provider TTS Passcode pop-screen and returns to the View Provider Timesheet Preferences screen</p> <p>If the Passcode Status is currently Locked, then the Passcode Status is set to Unlocked</p>

236	21130	CI-819056 - DSD BR CM 236 IMPLEMENTED	Generate new TTS Registration Code for Recipient by help desk user	When the Reset Recipient TTS Code Pop-up screen is saved by a help desk user	The Reset Recipient TTS Code Pop-up screen closes. The recipient's TTS code is updated in CM to the new value. EVVTS Provider Registration Code Notification (CMIPS 0002) form is generated on the County Printer assigned to the Case Owner of the Recipient, and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.
237	21130	CI-819057 - DSD BR CM 237 IMPLEMENTED	Generate new TTS Registration Code for Provider by help desk user	When the Reset Provider TTS Code Pop-up screen is saved by a help desk user	The Reset Provider TTS Code Pop-up screen closes. The provider's TTS code is updated in CM to the new value. EVVTS Provider Registration Code Notification (CMIPS 0002) form is generated on the County Printer assigned to the Case Owner of the most recently added case relationship for the provider, and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.
238		CI-822195 - DSD BR CM 238 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
239	21134 21214	CI-822184 - DSD BR CM 239 IMPLEMENTED	Register Recipient for TTS Pop-up Saved	The Register Recipient for TTS Pop-up screen is saved AND The Passcode and Confirm Passcode fields contain 4-digit numbers AND The 4-digit numbers in both fields match one another.	The Recipient is registered with TTS using the input 4-digit Passcode as the Recipient's new passcode. Close the Register Recipient for TTS Pop-screen and return to the View Recipient Timesheet Preferences screen. If the Recipient had an EVV Exception, the EVV Exception indicator is removed (blanked out). IF the Recipient has an approved EVV Exception THEN Create a Case Note with the following information: Case Note text = EVV Exception removed by recipient registration for TTS on <Current Date/Time>. Sensitivity = 1 Priority = Medium Status = Active Created by = <county user id>
240	12445 21063	CI-822198 - DSD BR CM 240 IMPLEMENTED	Generate – CMIPS 0003 - Recipient Confirmation of Changes or Enrollment in ESP or TTS	When the Recipient Enrolls in ESP OR When the Recipient Enrolls in TTS OR The Recipient's Communication Preference changes OR The Recipient's TTS Passcode changes	Generate TC3278 to the County printer in Nightly Batch.

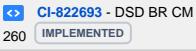
No	R e q ID	CI	Description	When	Action
2 41	2 1 1 34	CI-822288 - DSD BR CM 241 IMPLEMENTED	Register Provider for TTS Pop-up Saved	The Register Provider for TTS Pop-up screen is saved AND The Passcode and Confirm Passcode fields contain 4-digit numbers AND The 4-digit numbers in both fields match one another.	The Provider is registered with TTS using the input 4-digit Passcode as the Provider's new passcode. Close the Register Provider for TTS Pop-screen and return to the View Provider Timesheet Preferences screen.
2 42	2 0 7 70	CI-822324 - DSD BR CM 242 IMPLEMENTED	Set Notice of Action Option – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen and the Notice of Action Option is: • No Accommodation is Needed OR • County Support	Set Notice of Action Option Language to "BLANK"

2 43	2 0 7 70	CI-822325 - DSD BR CM 243 IMPLEMENTED	Set IHSS Required Forms Option – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen and the IHSS Required Forms Option is: <ul style="list-style-type: none">• No Accommodation is Needed• OR• County Support	Set IHSS Required Forms Option Language to "BLANK"
2 44	1 2 4 45 2 0 7 70	CI-822326 - DSD BR CM 244 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen and the Notice of Action Option is: <ul style="list-style-type: none">• No Accommodation is Needed• OR• County Support	Set Notice of Action Option Language to "BLANK"
2 45	1 2 4 45 2 0 7 70	CI-822327 - DSD BR CM 245 IMPLEMENTED	Set IHSS Required Forms Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen and the IHSS Required Forms Option is: <ul style="list-style-type: none">• No Accommodation is Needed• OR• County Support	Set IHSS Required Options Form Language to "BLANK"
2 46	2 1 1 58 2 1 1 55	CI-822387 - DSD BR CM 246 IMPLEMENTED	Rescind Terminated Case – EVV Evaluation	WHEN The Save link on the "Rescind Case with Client Index Number Search" screen is selected OR When the Save link is selected on the "Rescind Case without Client Index Number Search" screen is selected AND No errors are encountered	IF CaseEVVDetails table <u>DOES NOT</u> exist THEN Create CaseEVVDetails table AND Set CaseEVVDetails. TTSACCOMMODATIONS to 'No Accommodation' AND Set CaseEVVDetails. EVVEffectiveDate to equal CountyEVVDate for the Case County.
2 47	2 1 1 58 2 1 1 55	CI-822388 - DSD BR CM 247 IMPLEMENTED	Rescind Terminated Case – EVV Evaluation	WHEN The Save link on the "Rescind Case with Client Index Number Search" screen is selected OR When the Save link is selected on the "Rescind Case without Client Index Number Search" screen is selected AND No errors are encountered	IF CaseEVVDetails table <u>DOES</u> exist AND CaseEVVDetails. EVVEffectiveDate = 12/31/9999 (high end date) AND CountyEVVDate for the Case County <u>IS NOT</u> = 12/31/9999 THEN Set CaseEVVDetails. EVVEffectiveDate = CountyEVVDate for the Case County
2 48		CI-822389 - DSD BR CM 248 CANCELLED	Cancelled by ASR Sprint 25 Team 1&2		

2 49	2 1 1 58	CI-822390 - DSD BR CM 249 IMPLEMENTED	Recipient Timesheet Preferences screen – Inactivate ESP – Update Communication Preference	A County user Inactivates ESP Registration	IF Recipient is registered with TTS THEN Update Communication Preference to "Telephone" ELSE IF Recipient is not registered for TTS THEN Update Communication Preference to BLANK
2 50	2 0 7 74	CI-822411 - DSD BR CM 250 IMPLEMENTED	Incorrect Recipient Phone Number Reported by TTS	WHEN The TTS interface CMOE999E sends a transaction (Stop Outbound Call to Incorrect Telephone Number Set) to Case Management to notify of incorrect Recipient phone number provided for outbound call campaign for timesheet review	THEN CMIPS trigger a task to the Case Owner "<Case Number> Case Recipient Phone Number needs to be updated"

No	Req ID	CI	Description	When	Action
251	12264 12524	CI-822413 - DSD BR CM 251 IMPLEMENTED	Rescind Terminated Case – Recipient rescinds request for termination of services	When the Save link is selected on the "Rescind Case" screen AND The Case Status was Terminated AND The Case Status prior to Termination was Eligible or Presumptive Eligible AND The Rescind Reason is "Recipient rescinds request for termination of services"	Set the Case Status to the Case Status prior to Termination. AND Set Authorization Start Date to Authorization Start Date prior to Termination. AND Set Authorization End Date to Authorization End Date prior to Termination. AND Trigger NOA SH05 and all other applicable NOAs.
252	12264 12524	CI-822414 - DSD BR CM 252 IMPLEMENTED	Rescind Terminated Case – State Hearing Decision	When the Save link is selected on the "Rescind Case" screen AND The Case Status was Terminated AND The Case Status prior to Termination was Eligible or Presumptive Eligible AND The Rescind Reason is "State Hearing Decision"	Set the Case Status to the Case Status prior to Termination. AND Set Authorization Start Date to Authorization Start Date prior to Termination AND Set Authorization End Date to Authorization End Date prior to Termination AND Trigger NOA SH05 and all other applicable NOAs.
253		Reserved by CR107			
254	21175	CI-822501 - DSD BR CM 254 IMPLEMENTED	Upload Attachment associated to Case	User selects file for upload (following size and format limitations) AND Selects save button on the Upload Case Attachment Pop-Up.	IF The file name contains any characters other than 0 – 9, A – Z, a – z, ., - or _ (numbers 0 through 9, upper case A through Z, lower case a through z, dot, dash, or underscore), then substitute those characters with an underscore. THEN The file is stored and associated to the case. AND Any existing files that are marked for deletion for that day (given the form type is the same as form being uploaded - with the exception of SOC 426A, SOC 839, SOC 321, SOC 839A, SOC 838, and SOC 450) are no longer eligible to be restored AND The Case Attachment page displays with the most recently uploaded attachment listed first.
255	21175	CI-822502 - DSD BR CM 255 IMPLEMENTED	Archive Attachment associated to Case	User selects file for archiving	The document is moved to the Attachments History screen AND The document's status is immediately changed from Uploaded to Archived AND Is no longer triggered for deletion.

256	16050 21190	CI-822578 - DSD BR CM 256 IMPLEMENTED	MEDS Daily Receive (CMDR 103B) - Rescind a TR25 case termination from the past	<p>IF a case was terminated for non-compliance with Medi-Cal (TR25) within the last 90 days</p> <p>AND MEDS Daily Receive interface (CMDR103B) transaction is received with Medi-Cal Eligibility (Medi-Cal Eligibility Status is not 000 or does not begin or end with a '9') for all of the month(s) after the SAWS termination date (including the current month) so that no gap in Medi-Cal eligibility exists in the received file.</p>	<p>Rescind the TR25 termination with rescind reason Medi-Cal Non-Compliance Resolved (R0005):</p> <p>Generate TR26 NOA</p> <p>AND</p> <p>Produce Notification to the Case Owner - [case name] [case number] Case Terminated due to SAWS discontinuance was rescinded on [rescind date]. Please review case to determine provider reinstatement and case needs.</p> <p>AND</p> <p>Previous hours and Authorization segment are reinstated</p> <p>AND</p> <p>Start and End date are reinstated to the dates prior to termination.</p>
257	16050 12027 21190	CI-822614 - DSD BR CM 257 IMPLEMENTED	MEDS Monthly Renewal (CMMR 103D) - Rescind a TR25 case termination in the future	<p>IF a case is terminated for non-compliance with Medi-Cal (TR25) effective the first day of the next month</p> <p>AND</p> <p>The current month is eligible</p> <p>AND Medi-Cal sends eligibility (Medi-Cal Eligibility Status does not begin or end with a '9') for the future month on the MEDS Monthly Renewal file (CMMR103D)</p> <p>OR</p> <p>The current month is not eligible</p> <p>AND Medi-Cal sends eligibility (Medi-Cal Eligibility Status is not 000 or does not begin or end with a '9') for the current month on the MEDS Daily Receive file (CMDR103B) prior to MEDS Monthly Renewal (CMMR103D) that will run in the current month</p> <p>AND Medi-Cal sends eligibility for the future month on the MEDS Monthly Renewal File (CMMR103D) that is run in the current month</p>	<p>Rescind the TR25 termination with rescind reason Medi-Cal Non-Compliance Resolved (R0005):</p> <p>Generate TR26 NOA</p> <p>AND</p> <p>Produce Notification to the Case Owner - [case name] [case number] Case Terminated due to SAWS discontinuance was rescinded on [rescind date]. Please review case to determine provider reinstatement and case needs.</p> <p>AND</p> <p>Previous hours and Authorization segment are reinstated</p> <p>AND</p> <p>Start and End date are reinstated to the dates prior to termination.</p>
258		Reserved by CR170			
259	21228 21229 21212 21219	CI-822673 - DSD BR CM 259 IMPLEMENTED	Confirm EVV Exception for Recipient	When the Yes button is selected on the Confirm EVV Exception for Recipient pop-up	<p>IF the Recipient is registered on ESP with an account that is not already inactivated</p> <p>THEN inactivation logic is executed to inactivate the Recipient's ESP registration (per existing Recipient ESP Inactivate business rules)</p> <p>AND</p> <p>The inactivation comment, "Inactivation due to EVV Exception" is entered.</p> <p>ELSE IF the Recipient is already inactivated on the ESP</p> <p>THEN the Recipient's ESP registration remains inactivated.</p> <p>IF the Recipient is registered for TTS</p> <p>THEN the Recipient's TTS registration is inactivated by removing the registration date and pass code</p> <p>The Confirm EVV Exception for Recipient pop-up is closed</p> <p>AND</p> <p>The Recipient's EVV Exception Status is updated to Approved (EVES01)</p> <p>AND</p> <p>The EVV Exception Date Approved is update to the current date</p> <p>AND</p> <p>The EVV Exception button on the View Recipient Timesheet Preferences screen is no longer visible</p> <p>AND</p> <p>The Recipient's Communication Method is set to blank</p> <p>AND</p> <p>If the Recipient has a timesheet Accommodation of Press or Say then the Timesheet Accommodation is updated to No Accommodation.</p> <p>AND</p> <p>Form CMIPS 0004 will generate during batch (712LINDN) at the county printer.</p> <p>AND</p> <p>IF there are any outstanding timesheets in Pending Recipient Electronic Review status at the time a county enters an approved EVV Exception</p> <p>THEN</p>

			<p>IF The timesheet for the Provider with that Recipient isEVV = False THEN A copy of the EVV Exception Timesheet without EVV data elements (SOC 2261EXCEPT) will be printed immediately to the user's county printer. When printed, the EVV Exception Timesheet (SOC 2261EXCEPT) will contain a PDF-417 barcode containing appropriate data, the time entered for that pay period for that provider so that it can be sent to the TPF for imaging once it is signed.</p> <p>ELSE IF The timesheet for the Provider with that Recipient isEVV = True THEN A copy of the EVV Exception Timesheet with EVV data elements (SOC 2261EVV) will be printed immediately to the user's county printer. When printed, the EVV Exception Timesheet (SOC 2261EVV) will contain a PDF-417 barcode containing appropriate data, the time entered for that pay period and the EVV data element details for that provider so that it can be sent to the TPF for imaging once it is signed.</p> <p>AND</p> <p>The user will receive an informational message that the timesheet is printed</p> <p>AND</p> <p>The status of timesheets printed this way is updated to Pending Recipient Exception Review</p> <p>AND</p> <p>A case note entry is made on the Case Notes screen with the following information:</p> <p>Action: View/Edit (links are enabled)</p> <p>Entered by: SYSTEM</p> <p>Creation Date: <Current Date/Time></p> <p>Text: EVV Exception approved by <User Name and Worker Number> on <Current Date/Time></p> <p>AND</p> <p>Detailed case notes are made on the Case Note (details) screen with the following information:</p> <p>Priority: Medium</p> <p>Entered by: SYSTEM</p> <p>Status: Active</p> <p>Sensitivity: 1</p> <p>Creation Date: <Current Date/Time></p> <p>Subject: EVV Exception</p> <p>Notes History: <Full User Name> On <Current Date/Time> EVV Exception approved by <User Name and Worker Number> on <Current Date/Time></p> <p>AND</p> <p>IF The recipient is in a county with an EVV go live date THEN For each active provider assigned to the recipient who is registered on the ESP or TTS, set the EVV effective date to the later of the county EVV effective date or the beginning of the next pay period.</p> <p>ELSE IF The Recipient is not in an EVV live county or the Provider is not registered on the ESP or TTS THEN Do not set the EVV Effective Date</p> <p>ELSE IF The EVV Effective date for a Case Provider has already been updated to a date other than 12/31/9999 and the recipient is granted an exception THEN Do not update the EVV Effective Date</p>	
260	12264 12524		<p>Manual Rescind Termination - Medi-Cal Restored</p> <p>When the Save link is selected on the Rescind Case screen</p> <p>AND</p> <p>The Case Status was Terminated</p> <p>AND</p> <p>The Case Status prior to Termination was Eligible or Presumptive Eligible</p> <p>AND</p> <p>The Rescind Reason is Medi-Cal Restored.</p>	<ul style="list-style-type: none"> Set the Case Status to the Case Status prior to Termination. Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Trigger NOA TR27.

No	Req ID	CI	Description	When	Action
2	61	Reserved by CR223			
2	62	1 2 1 49	SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS Applicant/Recipient – Matching SSN Identified in CMIPS	When an S2 transaction is received and the indicated IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is "Pending" take the following action:	IF the Applicant SSN on the S2 does not match the SSN on the Person record associated with the IHSS Case Number AND It does match an Active (non-end dated) SSN Alternative ID value for another person in CMIPS THEN <ul style="list-style-type: none">Produce Task to the Case Owner– SAWS provided SSN [S2 SSN Value] for [case name] [case number]. This SSN matches an SSN for another person in CMIPS. SAWS transaction was not processed. AND Do not process the S2 transaction nor update CMIPS with details from this transaction
2	63	1 2 1 49	SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS Applicant/Recipient – Matching CIN Identified in CMIPS	When an S2 transaction is received and the indicated IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is "Pending" take the following action:	IF the Applicant CIN on the S2 does not match the CIN on the Person record associated with the IHSS Case Number AND It does match an Active (non-end dated) CIN Alternative ID value for another person in CMIPS THEN <ul style="list-style-type: none">Produce Task to the Case Owner– SAWS provided CIN [S2 CIN Value] for [case name] [case number]. This CIN matches a CIN for another person in CMIPS. SAWS transaction was not processed. AND Do not process the S2 transaction nor update CMIPS with details from this transaction
2	64	2 1 2 76	Monthly Batch Job to Delete Attachment IDs from Cloudian (500AINWN)	When batch job 500AINWN is executed AND Recipient form Attachment IDs created during the previous month are identified	IF Attachment ID is found in Cloudian THEN Delete the Attachment blob from Cloudian AND Run the purge script to delete the records from Attachment details table from Curam
2	65	2 0 9 05	View Recipient Flexible Hours History	When the View link is selected on the Recipient Flexible Hours History pop-up	Display the View Recipient Flexible Hours History pop-up

2	1	CI-823019 - DSD BR	MEDS Daily Receive (CMDR103B) – Processing to Set SOC 2271 Trigger	When MEDS Daily Receive (CMDR103B) is processed in CM AND A transaction, where eligibility status does not start or end with a '9', is processed for the current calendar month for a Recipient in Eligible or Presumptive Eligible status	IF the CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that does not begin or end with a '9' AND The transaction Medi-Cal Aid Code is different than the Recipient's Medi-Cal Aid Code for the current calendar month AND The transaction with this new Medi-Cal Aid Code has a zero SOC (Share of Cost) for the current calendar month AND The SOC (Share of Cost) for the current calendar month with the prior Medi-Cal Aid Code is greater than zero THEN Set trigger for SOC 2271 with SOC (Share of Cost) marked as No ELSE IF The CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that begins or ends with a '9' AND IF the transaction has a zero SOC (Share of Cost) for the current calendar month THEN Set trigger for SOC 2271 with SOC (Share of Cost) marked as No ELSE IF the transaction has a SOC (Share of Cost) greater than zero for the current calendar month THEN Set trigger for SOC 2271 with SOC (Share of Cost) marked as Yes
66	6	0	CM 266	IMPLEMENTED	

2 67	1 2 0 27	CI-823020 - DSD BR CM 267 IMPLEMENTED	MEDS Monthly Renewal Receive (CMMR103D) – Processing to Set SOC 2271 Trigger	<p>When MEDS Monthly Renewal Receive (CMMR103D) is processed in CM</p> <p>AND</p> <p>A transaction is processed for a Recipient in Eligible or Presumptive Eligible status</p> <p>IF the CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that does not begin or end with a '9'</p> <p>AND</p> <p>IF the transaction has a zero SOC (Share of Cost) for the future month</p> <p>AND</p> <p>The SOC (Share of Cost) for the current calendar month is greater than zero</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as No</p> <p>ELSE IF the transaction has a SOC (Share of Cost) greater than zero for the future month</p> <p>AND</p> <p>The SOC (Share of Cost) for the current calendar month is zero</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as Yes</p> <p>ELSE IF the CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that begins or ends with a '9'</p> <p>AND</p> <p>IF the transaction has a zero SOC (Share of Cost) for the future month</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as No</p> <p>ELSE IF the transaction has a SOC (Share of Cost) greater than zero for the future month</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as Yes</p>
2 68	2 1 3 20	CI-823134 - DSD BR CM 268 IMPLEMENTED	Modify Notification Communication Preference	When the Edit button is selected for Notification Communication Preference on View Recipient Timesheet Preferences Screen
2 69	2 1 3 20	CI-823135 - DSD BR CM 269 IMPLEMENTED	Verify Cell Phone Number	When the Verify Cell Phone is selected for Notification Communication Preference on View Recipient Timesheet Preferences Screen
2 70	2 1 1 75	CI-823243 - DSD BR CM 270 IMPLEMENTED	Restore Attachment associated to Case	<p>User selects Restore action on the Attachments History page for a file</p> <p>The file is no longer marked to be picked up by nightly batch for archiving</p> <p>AND</p> <p>Restore Action on Attachments History page for that file is updated to an Archive Action.</p>

No	R e q ID	CI	Description	When	Action
2 71	2 1 1 86 2 1 1 75	CI-823633 - DSD BR CM 271 IMPLEMENTED	Upload Attachment associated to Case	<p>User selects Save on the 'Upload a File' pop-up</p> <p>AND</p> <p>The form selected already exists on the Attachment screen</p> <p>AND</p> <p>The form status is 'Failed Scan'</p>	<p>THEN</p> <p>Place the new document in 'Pending Scan' status</p> <p>AND</p> <p>Update the status of the existing record from 'Failed Scan' to 'Archived Failed Scan' causing the record to be displayed on the 'Attachments History' screen.</p>

2 72	2 1 1 86 2 1 1 75	CI-823635 - DSD BR CM 272 IMPLEMENTED	Restore Attachment associated to Case	User selects the 'Restore' action for a document AND There is not a document of that type in the 'Uploaded' status	THEN Change the document status from 'Archived' to 'Uploaded'
2 73	2 1 1 86 2 1 1 75	CI-823636 - DSD BR CM 273 IMPLEMENTED	Restore Attachment associated to Case (Multiple Copies)	User selects the 'Restore' action for a document AND There is already a document of that type in 'Uploaded' status AND The document allows multiple copies (CR 6181, SOC 321, SOC 426A, SOC 838, SOC 839, SOC 839A, or SOC 450)	THEN Change the document status from 'Archived' to 'Uploaded'
2 74	2 1 1 86 2 1 1 75	CI-823637 - DSD BR CM 274 IMPLEMENTED	Delete Attachment associated to Case	User selects the 'Delete' action for a document	The document status is immediately changed to 'Pending Delete' AND Triggers its deletion in the overnight batch.
2 75	2 1 1 86 2 1 1 75	CI-823638 - DSD BR CM 275 IMPLEMENTED	Undelete Attachment associated to Case	User selects the 'Undelete' action for a document	The document status is immediately changed to 'Archived' AND Removes the deletion trigger.
2 76	2 1 3 78	CI-823715 - DSD BR CM 276 IMPLEMENTED	Electronic Forms - Display list of pending electronic forms for Recipient	User clicks on the Electronic Forms tab	Display the list of electronic forms that are in (Pending, Sent, Ready for Review, Accepted, Rejected) on the Electronic Forms table with their associated action links.
2 77	2 1 3 78	CI-823761 - DSD BR CM 277 IMPLEMENTED	Completed Electronic Forms - Display completed form	User clicks on the Completed Electronic Forms tab from the Case Attachment screen	Display the Completed Electronic Forms screen AND IF Form Status = Accepted THEN List the completed electronic form on the electronic forms table with its associated action links (View and History)
2 78	2 1 3 78	CI-823777 - DSD BR CM 278 IMPLEMENTED	Electronic Forms - Create new form	User selects the New button on the Electronic Forms screen	Display the Create Electronic Form Pop-Up AND WHEN User selects the Save button AND One or more forms are selected THEN Create the selected forms in the selected language in AWS and CM. AND IF a selected form is not available in the selected language THEN create the form in English. AND Adds the new form(s) to the Electronic Forms table: <ul style="list-style-type: none">• Action - displays Edit..., Send to CSP..., Send to ESP..., and History... links• Form Name - name of the new form(s)• Sent to - blank• Status - Pending AND Creates History snapshot record

2 79	2 1 3 78	CI-823779 - DSD BR CM 279 IMPLEMENTED	Electronic Forms - Send to CSP hyperlink	User selects the Send to CSP hyperlink on the Electronic Forms screen	<p>Display the Send Electronic Form to CSP Pop-Up AND IF The Send button is selected THEN Sends the Electronic Form to the Assigned Worker's CSP 'inbox'</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> Action - updated to remove Edit..., Send to CSP..., and Send to ESP... action links, adds Resend to CSP... and Resend to ESP... action links (History... link remains) Sent to - updated from blank to display the Assigned Worker's name Status - updated from Pending status to Sent <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: Allow form submission (AEM Internal Status)</p>
2 80	2 1 3 78	CI-823781 - DSD BR CM 280 IMPLEMENTED	Electronic Forms - Accept hyperlink	User selects the Accept hyperlink on the Electronic Forms screen	<p>Display the Accept Electronic Form Pop-Up AND IF The Yes button is selected THEN</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> Action - updated to remove Accept... and Reject... action links (View... and History... links remain) Status - updated from Ready For Review to Accepted <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: AEM Internal Status</p>

No	R e q ID	CI	Description	When	Action
2 81	2 1 3 78	CI-823815 - DSD BR CM 281 IMPLEMENTED	Electronic Forms - Resend to CSP hyperlink	User selects the Resend to CSP hyperlink on the Electronic Forms screen	<p>Display the Send Electronic Form to CSP Pop-Up AND IF The Send button is selected THEN Sends the Electronic Form to the Assigned Worker's CSP 'inbox'</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> Action - updated to display only the Resend to CSP..., Resend to ESP..., and History... action links Sent to - updated to display the Assigned Worker's name Status - updated to Resent status <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: Allow form submission (AEM Internal Status)</p>

2 82	2 1 3 78	 CI-823816 - DSD BR CM 282 IMPLEMENTED	Reject Electronic Form- Edit & Resend	User selects the Reject... hyperlink on the Electronic Form screen	<p>Displays the Reject Electronic Form Pop-Up AND IF The Edit & Resend button is selected THEN</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> Action - updated to remove Accept... and Reject... action links, adds Edit..., Send to CSP..., and Send to ESP... links (View..., History... action links remain) Sent to - updated to blank Status - updated from Ready For Review to Pending <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: Allow form to be editable but not submitted (AEM Internal Status)</p>
2 83	1 2 2 60 1 2 5 27 1 2 5 30 1 2 8 28	 CI-823846 - DSD BR CM 283 IMPLEMENTED	Terminate Case - Enrolled in PACE program	User selects the Save button on the Terminate Case screen AND Reason=Enrolled in PACE program	<p>Update case status to terminated</p> <p>AND</p> <p>Trigger TR28 NOA - Terminated - Enrolled in PACE program</p>
2 84	2 1 3 78	 CI-823850 - DSD BR CM 284 IMPLEMENTED	Electronic Forms - View action	User selects the View action link on the Electronic Forms table	Display the form with the current state of edits in a non editable PDF.
2 85	2 1 3 78	 CI-823886 - DSD BR CM 285 IMPLEMENTED	Accept Electronic Form 426A - County Worker Electronic Signature	WHEN a county worker clicks the Yes button on the Accept Electronic Form pop-up for electronic 426A	<p>THEN save, "Worker Name, Worker Number (Electronic)" in the WORKER NAME: field AND save the date <MM/DD/YYYY> the form was accepted in the DATE: field</p>
2 86		 CI-823896 - DSD BR CM 286 CANCELLED	Cancelled via ASR Sprint 57 Team CM&AS		
2 87		 CI-823897 - DSD BR CM 287 CANCELLED	Cancelled via ASR Sprint 57 Team CM&AS		
2 88	2 1 3 78	 CI-823910 - DSD BR CM 288 IMPLEMENTED	Electronic Forms - Submit Action	When a user submits an electronic form in CSP or ESP	<p>The electronic form is passed between AEM CSP or AEM ESP and Case Management</p> <p>Case Management updates the Electronic Forms table for the corresponding form:</p> <ul style="list-style-type: none"> Action - updated to remove Resend to CSP... and Resend to ESP... action links, adds View..., Accept..., Reject... action links (History... link remains) Status - updated to Ready for Review <p>AND</p> <p>Creates History Snapshot record</p> <p>AND</p> <p>Update AEM via webservice: (AEM Internal Status)</p>

2 89	2 0 7 65 2 0 7 96 2 1 1 53	CI-823933 - DSD BR CM 289 IMPLEMENTED	Modify Recipient Timesheet Accommodation	<p>The Modify Recipient Timesheet Accommodation Pop-up is saved</p> <p>AND</p> <p>The timesheet accommodation option selected is one of the three options:</p> <ul style="list-style-type: none"> • No Accommodation • *Press or Say • Large Font Timesheet <p>AND</p> <p>The Recipient is not designated to receive Advance Pay</p> <p>AND</p> <p>The Recipient who is registered for TTS has Spoken Language English or Spanish.</p> <p>*Recipient must be registered for TTS for this option to be selected.</p>	<p>The Modify Recipient Timesheet Accommodation Pop-up closes.</p> <p>The Recipient's Timesheet Accommodation is saved in Case Management.</p>
2 90	2 1 3 78	CI-823979 - DSD BR CM 290 IMPLEMENTED	Electronic Forms - Send to ESP hyperlink	<p>User selects the Send to ESP hyperlink on the Electronic Forms screen</p>	<p>Display the Send Electronic Form to ESP Pop-Up</p> <p>AND WHEN</p> <p>The Send button is selected</p> <p>THEN</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action: removes Edit..., Send to CSP, Send to ESP action links, adds Resend to CSP and Resend to ESP action links, (View and History links remain) • Status: Sent • Sent to: Recipient <p>AND</p> <p>Creates History snapshot record</p>

No	R e q ID	CI	Description	When	Action
2 91	2 1 3 78	CI-823980 - DSD BR CM 291 IMPLEMENTED	Electronic Forms - Resend to ESP hyperlink	<p>User selects the Resend to ESP hyperlink on the Electronic Forms screen</p>	<p>Display the Send Electronic Form to ESP Pop-Up</p> <p>AND WHEN</p> <p>The Send button is selected</p> <p>THEN</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action: removes Edit..., Send to CSP, Send to ESP action links, adds Resend to CSP and Resend to ESP action links, (View and History links remain) • Status: Resent • Sent to: Recipient <p>AND</p> <p>Creates History snapshot record</p>
2 92	2 1 3 78	CI-823985 - DSD BR CM 292 IMPLEMENTED	Accept Electronic Form SOC 838 - Save County Worker Electronic Signature	<p>A county worker selects the Yes button on the Accept Electronic Form Pop-Up for electronic SOC 838</p>	<p>Save, "Worker Name (Electronic)" in the SOCIAL WORKER NAME: field overlaid across First, Middle, Last input fields.</p> <p>AND</p> <p>Save the date <MM/DD/YYYY> the form was accepted at the end of the SOCIAL WORKER NAME: field overlaid across First, Middle, Last input fields.</p> <p>AND</p> <p>Save the Worker Number in the SOCIAL WORKER IDENTIFICATION NUMBER field.</p>
2 93	2 1 3 78	CI-824004 - DSD BR CM 293 IMPLEMENTED	Electronic Forms - Edit hyperlink	<p>User selects the Edit... hyperlink on the Electronic Forms screen</p>	<p>Display the Edit Electronic Form Pop-Up screen</p> <p>AND WHEN</p> <p>The Edit button is selected</p> <p>THEN</p> <p>Display the editable electronic form in a new window</p>
2 94	2 1 3 78	CI-824011 - DSD BR CM 294 IMPLEMENTED	Electronic Forms - add request to complete e-form to Message Center in ESP	<p>User selects the Send button on the Send Electronic Form to ESP Pop-Up</p>	<p>Insert the Electronic Form Completion Request message into the CONCERNROLEEFORMSDATA / CONCERNROLEEFORMSDATASNAPSHOT table for the Recipient</p>

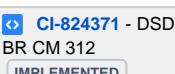
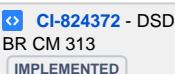
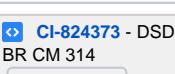
2 95	2 1 3 78	CI-824014 - DSD BR CM 295 IMPLEMENTED	Electronic Forms - create SOC825 with or without Recipient phone number	User selects the Yes button on the Create Electronic Form Pop-Up AND SOC 825 is checked	Allow the action AND IF Recipient has a telephone number saved in Case Management THEN Pre-populate the 'Recipient's Telephone #' field ELSE IF Recipient does not have a telephone number saved in Case Management THEN 'Recipient's Telephone #' field remains blank
2 96	2 1 3 78	CI-824042 - DSD BR CM 296 IMPLEMENTED	Electronic Forms - add Electronic Form Accepted message to Message Center in ESP	User selects the Yes button on the Accept Electronic Form Pop-Up AND Recipient/Provider is registered to ESP	Insert the Electronic Form Accepted message into the CONCERNROLEEFORMSDATA / CONCERNROLEEFORMSDATASNAPSHOT table for the Recipient/Provider
2 97	2 1 3 78	CI-824043 - DSD BR CM 297 IMPLEMENTED	Electronic Forms - Submit Action in ESP	When a user submits an electronic form in ESP	Form parameters are passed between AEM ESP and Case Management AND Updates the Electronic Forms table: <ul style="list-style-type: none">• Action - updated to remove Resend to CSP... and Resend to ESP... action links, adds View..., Accept..., Reject... action links (History... link remains)• Status - updated to Ready for Review AND Creates History Snapshot record AND Update AEM via webservice: (AEM Internal Status)
2 98	2 1 3 75 2 1 3 78	CI-824070 - DSD BR CM 298 IMPLEMENTED	Accept Electronic Form SOC 295 - Save County Worker Electronic Signature	When a county worker selects the Yes button on the Accept Electronic Form Pop-Up for electronic SOC 295	Save, "Worker Name, Worker Number (Electronic)" in the SIGNATURE of SOCIAL WORKER or AGENCY REPRESENTATIVE field AND Save the date <MM/DD/YYYY> the form was accepted in the SIGNATURE of SOCIAL WORKER or AGENCY REPRESENTATIVE field AND Save the social worker's telephone number in the TELEPHONE NUMBER field
2 99	2 1 3 75 2 1 3 76 2 1 3 77	CI-824083 - DSD BR CM 299 IMPLEMENTED	Create Message Pop-Up - Email Notification Preference (Recipient)	When the 'Send' or 'Send & New' button is selected on the Create Message Pop-Up AND The Recipient's notification preference is Email	IF The High Priority checkbox is not selected THEN Send the IHSS - Notification of Message (ETSE65) email ELSE The High Priority checkbox is selected THEN Send the IHSS - Notification of High Priority Message (ETSE66) email
3 00	2 1 3 75 2 1 3 88 2 1 3 89	CI-824084 - DSD BR CM 300 IMPLEMENTED	Create Message Pop-Up - Text Notification Preference (Recipient)	When the 'Send' or 'Send & New' button is selected on the Create Message Pop-Up AND The Recipient's notification preference is Text	IF The High Priority checkbox is not selected THEN Send the Notification of Message (TM65) text message ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Message (TM66) text message

No	R e q ID	CI	Description	When	Action

3 01	2 1 3 75 2 1 3 76 2 1 3 77 2 1 3 88 2 1 3 89	 CI-824085 - DSD BR CM 301 IMPLEMENTED	Create Message Pop-Up - Both Email and Text Notification Preference (Recipient)	When the 'Send' or 'Send & New' button is selected on the Create Message Pop-Up AND The Recipient's notification preference is Both Email and Text	IF The High Priority checkbox is not selected THEN Send the Notification of Message (TM65) text message and the IHSS - Notification of Message (ETSE65) email ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Message (TM66) text message and the IHSS - Notification of High Priority Message (ETSE66) email
3 02	2 1 3 75 2 1 3 92 2 1 3 93	 CI-824106 - DSD BR CM 302 IMPLEMENTED	Send Electronic Form to ESP Pop-Up - Email Notification Preference (Recipient)	When the 'Send' button is selected on the Send Electronic Form to ESP Pop-Up AND The Recipient's notification preference is Email	IF The High Priority checkbox is not selected THEN Send the IHSS - Notification of Electronic Form (ETSE71) email ELSE The High Priority checkbox is selected THEN Send the IHSS - Notification of High Priority Electronic Form (ETSE72) email
3 03	2 1 3 75 2 1 3 94 2 1 3 95	 CI-824107 - DSD BR CM 303 IMPLEMENTED	Send Electronic Form to ESP Pop-Up - Text Notification Preference (Recipient)	When the 'Send' button is selected on the Send Electronic Form to ESP Pop-Up AND The Recipient's notification preference is Text	IF The High Priority checkbox is not selected THEN Send the Notification of Electronic Form (TM71) text message ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Electronic Form (TM72) text message
3 04	2 1 3 75 2 1 3 92 2 1 3 93 2 1 3 94 2 1 3 95	 CI-824108 - DSD BR CM 304 IMPLEMENTED	Send Electronic Form to ESP - Both Email and Text Notification Preference (Recipient)	When the 'Send' button is selected on the Send Electronic Form to ESP Pop-Up AND The Recipient's notification preference is Both Email and Text	IF The High Priority checkbox is not selected THEN Send the Notification of Electronic Form (TM71) text message and the IHSS - Notification of Electronic Form (ETSE71) email ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Electronic Form (TM72) text message and the IHSS - Notification of High Priority Electronic Form (ETSE72) email

3 05	2 1 3 75	CI-824305 - DSD BR CM 305 IMPLEMENTED	Create Form Pop-Up – GEN 1365	<p>When the County Worker selects the 'Save' button on the Create Form Pop-Up AND</p> <p>The print option selected is 'Send Electronic Copy to ESP' AND</p> <p>The form selected is 'SOC 821 - Assessment Of Need For Protective Supervision' OR 'SOC 321 - Request For Order And Consent ParaMedical Services'</p>	<p>The system will generate the NA Continuation GEN 1355 form in English, when English is the designated written language or when the written language is not supported. The NA Continuation GEN 1365 form will be included with the corresponding SOC form.</p> <p>These forms will be sent as a PDF to the corresponding Recipient's ESP Message Center Inbox.</p>
3 06	2 1 3 78	CI-824339 - DSD BR CM 306 IMPLEMENTED	Accept Electronic Form SOC 864 - Save County Worker Electronic Signature	<p>When a county worker selects the 'Yes' button on the Accept Electronic Form Pop-Up for electronic SOC 864</p>	<p>Add the date <MM/DD/YYYY> the form was accepted in the Date: field AND</p> <p>Add the "<Worker's Name>, <Worker Number> (Electronic)" to the Signature: field</p> <p>IF The Recipient indicated that there are no changes from the prior year THEN The bottom County Staff Area will be used</p> <p>ELSE The Recipient indicated that there are changes from the prior year THEN The top County Staff Area will be used</p>
3 07	2 1 3 75 2 1 3 92	CI-824342 - DSD BR CM 307 IMPLEMENTED	Create Form Pop-Up - Email Notification Preference (Recipient)	<p>When the 'Save' button is selected on the Create Form Pop-Up AND</p> <p>The print option selected is 'Send Electronic Copy to ESP' AND</p> <p>The Recipient's notification preference is Email</p>	Send the IHSS - Notification of Electronic Form (ETSE71) e-mail to the corresponding Recipient's email address
3 08	2 1 3 75 2 1 3 94	CI-824343 - DSD BR CM 308 IMPLEMENTED	Create Form Pop-Up - Text Notification Preference (Recipient)	<p>When the 'Save' button is selected on the Create Form Pop-Up AND</p> <p>The print option selected is 'Send Electronic Copy to ESP' AND</p> <p>The Recipient's notification preference is Text</p>	Send the Notification of Electronic Form (TM71) text message to the corresponding Recipient's phone number
3 09	2 1 3 75 2 1 3 92 2 1 3 94	CI-824344 - DSD BR CM 309 IMPLEMENTED	Create Form Pop-Up - Both Email and Text Notification Preference (Recipient)	<p>When the 'Save' button is selected on the Create Form Pop-Up AND</p> <p>The print option selected is 'Send Electronic Copy to ESP' AND</p> <p>The Recipient's notification preference is Both Email and Text</p>	Send the IHSS - Notification of Electronic Form (ETSE71) e-mail and Notification of Electronic Form (TM71) text message to the corresponding Recipient's email and phone number
3 10	2 1 3 78	CI-824359 - DSD BR CM 310 IMPLEMENTED	Accept Electronic Form SOC 825 - Save County Worker Electronic Signature	<p>When a county worker selects the Yes button on the Accept Electronic Form Pop-Up for electronic SOC 825</p>	<p>Save, "<Worker's Name>, <Worker Number> (Electronic) <MM/DD/YYYY>" to the "SIGNATURE OF IHSS SOCIAL WORKER:" field AND</p> <p>Save the "<Contact Phone>" in the "CONTACT PHONE #:" field</p>

No	R e q ID	CI	Description	When	Action

3 11	2 1 3 78		Modify or Inactivate Form (3rd Party Form)	When a county worker clicks the Save button on the Modify and Inactivate Form Pop-Up AND The form selected is one of SOC 321, SOC 821, or SOC 873/874 AND The Mark as Inactivate/Not Mailed checkbox is selected AND The status is 'Sent to ESP'	Set the Form status to Inactivated AND Remove Due Date from the Form & Correspondence List screen AND Replace the '3rd party form message' in the users ESP Inbox with the '3rd party form Inactivated' message.
3 12	2 1 3 75		Create Form Pop-Up - 3rd Party Form Email Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Email AND The form selected is a 3rd party form	Send the ESP 3rd Party Electronic Form email notification to the corresponding Recipient's email address AND IF The form selected is one of: <ul style="list-style-type: none">• SOC 321• SOC 821• SOC 873• SOC 873L• SOC 873/874 Bundle• SOC 873L/874L Bundle Send the ESP 3rd Party Electronic Form inbox notification to the corresponding Recipient's ESP as well Note: The link in the ESP inbox notification will display one PDF of the selected form with the selected supported language version and the English version appended to the end.
3 13	2 1 3 75		Create Form Pop-Up - 3rd Party Form Text Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Text AND The form selected is a 3rd party form	Send the ESP 3rd Party Electronic Form text message to the corresponding Recipient's phone number AND IF The form selected is one of: <ul style="list-style-type: none">• SOC 321• SOC 821• SOC 873• SOC 873L• SOC 873/874 Bundle• SOC 873L/874L Bundle Send the ESP 3rd Party Electronic Form inbox notification to the corresponding Recipient's ESP as well Note: The link in the ESP inbox notification will display one PDF of the selected form with the selected supported language version and the English version appended to the end.
3 14	2 1 3 75		Create Form Pop-Up - 3rd Party Form Both Email and Text Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Both Email and Text AND The form selected is a 3rd party form	Send the ESP 3rd Party Electronic Form email notification and ESP 3rd Party Electronic Form text message to the corresponding Recipient's email and phone number AND IF The form selected is one of: <ul style="list-style-type: none">• SOC 321• SOC 821• SOC 873• SOC 873L• SOC 873/874 Bundle• SOC 873L/874L Bundle Send the ESP 3rd Party Electronic Form inbox notification to the corresponding Recipient's ESP as well Note: The link in the ESP inbox notification will display one PDF of the selected form with the selected supported language version and the English version appended to the end.

3	2	CI-824396 - DSD BR CM 315 IMPLEMENTED	Electronic Forms – Reject Action	When the user selects the Reject hyperlink on the Electronic Form screen	Display the Reject Electronic Form Pop-Up AND IF The Reject Form button is selected THEN Update the Electronic Forms table: <ul style="list-style-type: none">• Action - updated to remove View, Accept, and Reject action links, (History action link remain)• Sent to - updated to the user who rejected the form• Status - updated from Ready For Review to Rejected AND Create History snapshot record AND Update AEM via webservice: The electronic form is deleted in AEM (AEM Internal Status)
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (1-10)

No	Req ID	CI	Description	When	Action
1	12164	CI-111210 - DSD BR CM 01 IMPLEMENTED	Track "Case Pending Inter-County Transfer" Status	When a Create Inter-County Transfer screen is saved.	<p>Set the Inter-County Transfer status to "In-Progress".</p> <p>AND IF</p> <p>The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month</p> <p>ALSO</p> <p>Send S9 to SAWS Sending County with "IP" status.</p>
2	16181	CI-111211 - DSD BR CM 02 IMPLEMENTED	Cancel Inter-County Transfer Action	When a user in the Sending County selects the Yes link on the Cancel Transfer Request screen. Note: The receiving county is not able to cancel an in-progress ICT	<p>Update the Inter-County Transfer status to "Cancelled".</p> <p>Trigger the applicable Task "[case name] [case number] Inter-County Transfer Cancelled" (DSD Section 30.6 #23)</p> <p>AND IF</p> <p>The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month</p> <p>ALSO</p> <p>Send S9 to SAWS Receiving County with "CX" status.</p>
3	12178	CI-111212 - DSD BR CM 03 IMPLEMENTED	Cancel Inter-County Transfer on Case Termination.	When a Recipient case with an Inter-County Transfer status of In-Progress is Terminated.	<p>Update the Inter-County Transfer status to Cancelled.</p> <p>AND IF</p> <p>The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month</p> <p>ALSO</p> <p>Send S9 to SAWS Sending County that with "CX" status.</p> <p>Note: The rules for termination will be followed and an S8 with a terminated status will be sent to SAWS.</p>
4	12187	CI-111213 - DSD BR CM 04 IMPLEMENTED	Update State Hearing Status	When Create State Hearing is saved.	Set the State Hearing status to "Requested".
5	12187	CI-111214 - DSD BR CM 05 IMPLEMENTED	Update State Hearing Status	When a Create State Hearing screen is saved and the scheduled hearing date field is not blank.	Set the State Hearing status to Scheduled.
6	12187	CI-111215 - DSD BR CM 06 IMPLEMENTED	Update State Hearing Status	When a Modify State Hearing screen is saved and the Scheduled Hearing Date field is not blank.	Set the State Hearing status to "Scheduled".
6a	12187	CI-111216 - DSD BR CM 06a IMPLEMENTED	Update State Hearing Status	When a Modify State Hearing screen is saved and an outcome other than Pending is indicated with an Outcome Date.	<p>Set the State Hearing status to Resolved</p> <p>Set all fields except Compliance Form Sent Date to be non-editable</p>
7	12492	CI-111217 - DSD BR CM 07 IMPLEMENTED	Update Homemaker Timesheet Status	When Homemaker Timesheet Details entry is saved.	Set the Timesheet status to "Not Submitted".
8	12492	CI-111218 - DSD BR CM 08 IMPLEMENTED	Update Homemaker Timesheet Status	When the Submit link is selected from the Submit for Approval Homemaker Timesheet screen.	Set the Homemaker Timesheet status to "Submitted" for the indicated Homemaker Timesheets.

9	12492	 CI-111219 - DSD BR CM 09 IMPLEMENTED	Update Homemaker Timesheet Status	When the Approve link associated with a specific record is selected from the View Homemaker Timesheet screen.	Set the Homemaker Timesheet Status for that record to "Approved".
10	12492	 CI-111220 - DSD BR CM 10 IMPLEMENTED	Update Homemaker Timesheet Status	When the Reject link is selected from the Reject Homemaker Timesheet screen.	Set the Homemaker Timesheet status for the record to Rejected.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (11-20)

No	Req ID	CI	Description	When	Action
11	12257 16657 20734	 CI-111221 - DSD BR CM 11 IMPLEMENTED	Terminate Case	When Terminate Case screen is saved.	<ul style="list-style-type: none"> Set the Active Evidence Authorization End Date to the Terminate Case Authorization End Date System builds prorated service month when appropriate Set the Recipient Case status to Terminated Set the related Active or On Leave status Individual Provider records to Terminated Set the related Individual Provider Termination Reason to Recipient Not Eligible Set the related Individual Provider Leave/Terminate Provider Effective Date to Terminate Case Authorization End Date If a WPCS hours record exists for the indicated time period, set the WPCS End Date to the Terminate Case Authorization End Date. (WPCS Hours will not be prorated) Send a notification to the WPCS Worker indicating WPCS hours terminated and IHSS Recipient case termination If a Workplace Hours record exists for the indicated time period, set the Workplace Hours End Date to the Terminate Case Authorization End Date (workplace hours will not be prorated) Send a LH40 notification the MEDS of termination End Date Provider Workweek Agreement End Date all Recipient Workweek Agreement, regardless Provider Status Recalculate Monthly Overtime Maximum Recalculate Provider and Recipient Weekly Maximum Update Number of Active Cases Update Number of Active Providers <p>AND IF</p> <p>The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month</p> <p>ALSO</p> <ul style="list-style-type: none"> Send a S8 notification to SAWS of termination
12	16658 16941 20734 20735	 CI-111222 - DSD BR CM 12 IMPLEMENTED	Leave Case	When Leave Case screen is saved.	<ul style="list-style-type: none"> Set the Active Evidence Authorization End Date to the Leave Case Authorization End Date Set the case status to Leave System builds prorated service month when appropriate Set the related Active status Individual Provider to On Leave Set the related Individual Provider Leave/Terminate Provider Effective Date to Leave Case Authorization End Date If a Workplace hours record exists for the indicated time period, set the Workplace Hours End Date to the Leave Case Authorization End Date (Workplace hours will not be prorated) End Date Provider Workweek Agreement End Date all Recipient Workweek Agreement regardless of Provider Status Recalculate Monthly Overtime Maximum Recalculate Provider and Recipient Weekly Maximum Update Number of Active Cases Update Number of Active Providers <p>AND IF</p> <ul style="list-style-type: none"> The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month <p>ALSO</p> <ul style="list-style-type: none"> Send S8 to SAWS with a leave status

14	16880 16110 16111 16912 16112 16115	<input checked="" type="checkbox"/> CI-111223 - DSD BR CM 14 IMPLEMENTED	New Application - Reactivate Case	When Reactivate Case screen is saved.	<p>When the Reactivate Case screen is saved:</p> <ul style="list-style-type: none"> • Set the Referral Date to the current date or user entered date • Set the Application Date to the current date or user entered date • Set the Medi-Cal Eligibility Referral Date to blank • Set Medi-Cal Initial eligibility Notification Date to blank • Display Assign Worker list based upon the County associated with the User taking the action • Set County to the County associated with the Assigned Worker • Set the District Office to the District Office associated with the Assigned Worker • Set all Health Care Certification fields to blank • Inactivate prior Disaster Preparedness record • An IH18 will be sent to MEDS when a case is reactivated <p>AND IF DURING SCI CLEARANCE</p> <ul style="list-style-type: none"> • A match is found, and the Medi-Cal eligibility status is eligible and the Medi-Cal Aid Code is 10, 20, or 60 then complete the action. <p>ELSE IF DURING SCI CLEARANCE</p> <ul style="list-style-type: none"> • A match is found, and the Medi-Cal eligibility status is eligible and the Medi-Cal Aid Code is other than 10, 20, or 60 then an S8 with "Pending" status will be sent to SAWS. <p>OR IF</p> <ul style="list-style-type: none"> • During SCI clearance, a match is found, and the Medi-Cal eligibility status is not eligible then an S1 will be sent to SAWS.
15	12469 1 2772	<input checked="" type="checkbox"/> CI-111224 - DSD BR CM 15 IMPLEMENTED	View Form	When the status of a form or correspondence is Pending.	The Form Name will not display in the View Form and Form Name fields
16	16464	<input checked="" type="checkbox"/> CI-111225 - DSD BR CM 16 IMPLEMENTED	Modify or Inactivate Form	When a Modify or Inactivate Form screen is saved and the status is Pending and Mark As Inactivate /Not Mailed is indicated.	Set the Form status to Inactivated
17	12469	<input checked="" type="checkbox"/> CI-111226 - DSD BR CM 17 IMPLEMENTED	Modify or Inactivate Form	When a Modify or Inactivate Form screen is saved and the status is Printed and Mark As Inactivate/Not Mailed is indicated.	Set the Form status to Not Mailed
18	11948	<input checked="" type="checkbox"/> CI-111227 - DSD BR CM 18 IMPLEMENTED	Activate Evidence (Final Determination)	When case evidence is activated and the Case status changes from Leave to Eligible or Presumptively Eligible and a Resource Suspension End Date is indicated.	Set the Resource Suspension End Date to blank
19a	12465	<input checked="" type="checkbox"/> CI-111229 - DSD BR CM 19a IMPLEMENTED	County Contractor Invoice Exception Processing	Identifies and reports the following Recipient case exceptions associated with a County Contractor Billing Invoice submission.	<p>Recipient case not found – The IHSS case number submitted does not match a valid IHSS case number</p> <p>When a Billing Invoice File has any erroneous data the entire file rejects from processing. Because there are no records processed there will be no report produced.</p> <p>Invalid SSN – The SSN submitted does not match the IHSS Recipient SSN in CMIPS (Match against Alternative ID Type Social Security Number if present or Alternative ID Type Conversion Duplicate)</p> <p>Incorrect Recipient Name – The Recipient name associated with the case number does not match CMIPS data</p> <p>Recipient Not Eligible – The IHSS Recipient case is not allocated County Contractor Hours for the service month submitted</p> <p>Incorrect CC Rate Submitted – The rate submitted for the service period does not match the County Contractor Pay Rate for the service period</p> <p>SOC Collected Recipient Case Not Found – The IHSS Case Number submitted is Share of Cost and either the SOC Obligated Date or SOC Obligated Amount is missing</p> <p>Contractor not eligible for Service Month – For the period submitted the County Contractor did not have a Contract with the County</p> <p>Invalid Service Period – Service Period submitted is not valid for the Contractor</p> <p>Invalid Service Month – Contractor billing include "future" billing</p> <p>SOC Already Collected \$XX.XX - SOC amount already deducted from a prior payment – Contractor should reimburse indicated SOC Amount to the Recipient.</p>

19b	16194 1 6250	CI-111228 - DSD BR CM 19b IMPLEMENTED	County Contractor Invoice Processing	<p>Processes, determines and reports the following details associated with each County Contractor Billing Invoice submission against the invoice and Recipient case.</p>	<p>Invoice Details</p> <ul style="list-style-type: none"> • Invoice # - From Billing Invoice • Invoice Date – From Billing Invoice • Processed Date – The date the invoice was processed in CMIPS • Billing Month – From Invoice Submission • Original Amount – The total dollar amount associated with the Recipient records submitted for the billing month (Hours x Rate) from invoice details • Rejected Amount – The sum dollars (Hours x Rate) associated with each Exception Record • Cut Back Amount – The sum of the Cutback Amounts from those records not reported as Exceptions • SOC Collected Amount – The sum of the SOC Collected Amounts from those records not reported as Exceptions • Authorized Amount – (The Original – Rejected Amount – Cut Back Amount – SOC Collected Amount) • Set County Contractor Billing Invoice Record status to Pending <p>Payment Details</p> <ul style="list-style-type: none"> • Case Count – Count of Recipient records paid in the billing month associated with a particular service month and funding source • Amount – The aggregated amount paid by the IHSS program related a funding source and service month
20	16050	CI-111230 - DSD BR CM 20 IMPLEMENTED	MEDS Daily Receive	<p>When an update to the Medi-Cal eligibility information for the IHSS Recipient case is received via MEDS Daily receive file.</p> <p>AND</p> <p>the CIN on the MEDS Daily Receive record equals the most current CIN found in CMIPS</p>	<p>If initial Medi-Cal eligibility is received for a Recipient, populate Medi-Cal Determination Date</p> <p>If monthly record does not exist for Recipient, add Eligibility Month record and populate Medi-Cal eligibility data in CMIPS</p> <p>If monthly record exists apply update(s) in CMIPS</p> <p>If Medi-Cal Eligibility Status or FFP changes, call the Authorization to update the funding source based on the new Medi-Cal Eligibility. Call Authorization process creates new evidence and authorizes the evidence.</p> <p>If a Recipient, in which termination was rescinded, has record(s) on the Medi-Cal Daily Receive (CMDR103B) batch interface file, the batch creates an SOC hours trigger record for each service month up to the month in which the termination was rescinded that indicates the Recipient has an uncertified Medi-Cal share of cost (Eligibility Status Code begins with a '5').</p> <ul style="list-style-type: none"> • The service month has to be in a month that is ON or AFTER CONFIGURATION.SOCCutOffDate. • The service month has to be within 12 months PRIOR to the current month. If the service month is beyond 12 months from the current month then the batch will not write a trigger for that month.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (21-30)

No	Req ID	CI	Description	When	Action
21	12027	CI-111231 - DSD BR CM 21 IMPLEMENTED	MEDS Monthly Renewal	When Medi-Cal eligibility for the future month is received via MEDS Monthly Renewal Receive file. AND the CIN on the MEDS Monthly Renewal Receive record equals the most current CIN found in CMIPS	If initial Medi-Cal eligibility is received for a Recipient, populate Medi-Cal Determination Date Populate the Medi-Cal eligibility for the future months in CMIPS If Medi-Cal Eligibility Status or FFP is not the same as previous Eligibility month call the Authorization to update the funding source based on the new Medi-Cal Eligibility for the future month. Call Authorization process creates new evidence and authorizes the evidence. Create triggers for all Recipients in Eligible status where the MediCal Eligibility record for the future calendar month indicates the Recipient has uncertified Medi-Cal Share of Cost (Eligibility Status Code begins with '5'): <ul style="list-style-type: none">• The triggers indicate if they are in an unprocessed status.• The triggers identify if the Recipient is Advance Pay.
24	16054	CI-111232 - DSD BR CM 24 IMPLEMENTED	MEDS Quarterly Reconciliation Interface Send	When MEDS Recon program is run, sends reconciliation file for the active IHSS cases.	Sends the following transactions to MEDS for the active IHSS cases: <ul style="list-style-type: none">• RI20 - Add/New Eligibility/Update Eligibility in County
25	11989 1 6052	CI-111233 - DSD BR CM 25 IMPLEMENTED	Pending Evidence is Approved and Status is Eligible or Presumptive Eligible	When the Submit for Approval link is selected on screen and the outcome is Eligible.	Send IH20 to MEDS AND IF The Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month ALSO Send S8 to SAWS with "Eligible" or "Presumptive Eligible" status. (See also DSD – Section 22 – Final Determination BR #21 – CI 111,309)
26			Removed with SCF 4247 as a duplicate of CI 111,210		
27			Removed CR659 – SCF 3250		
28			Removed with SCF 4247 as a duplicate of CI 111,210		
30	16592	CI-111237 - DSD BR CM 30 IMPLEMENTED	SAWS Daily Receive	When the SAWS Daily Receive file is received CMIPS will complete the following actions:	S3 – Medi-Cal Discontinuance - Produce Notification to Case Owner when a Medi-Cal Discontinuance is received The SAWS status/information is updated on Case SAWS Information screen

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (31-40)

No	Req ID	CI	Description	When	Action
31	12142	 CI-111238 - DSD BR CM 31 IMPLEMENTED	SCI Daily Receive	When the SCI Daily Receive is processed CMIPS will complete the following actions:	<p>If the CIN does not match an existing CIN in CMIPS then check Field Code value:</p> <p>If the Field Code is "421" – CIN change resulting from MEDS **11 transaction check Before Image of Data Field</p> <p>If Before Image of Data Field matches existing CMIPS CIN</p> <ul style="list-style-type: none"> • Update the associated CMIPS Person Record – Alternate ID Type – CIN with the CIN received from SCI • Set the Alternate ID Type – CIN From (date) to the date the SCI update is processed • Set the Update By to SCI Update Receive <p>Otherwise ignore record</p>
32	16004	 CI-111239 - DSD BR CM 32 IMPLEMENTED	35C (Long Paid Claims)	When 35C (Long Paid Claims) job is run via batch scheduler.	Send paid claims for prior month for the IHSS payments (Advance and Arrears payments) to DHCS
33	12284	 CI-111240 - DSD BR CM 33 IMPLEMENTED	IHO/WPCS Demographics	Each month In-Home Operations (IHO) will provide a file containing IHSS case numbers for IHO Recipients and wait for listed clients. CMIPS will compare this list with Recipients known to CMIPS and will provide demographic data file.	WPCS demographic data
34	12247	 CI-111241 - DSD BR CM 34 IMPLEMENTED	Daily Update Funding Source Process	Processes cases identified as requiring funding source updates.	See Section below for Update Funding Source Business Rules
35a	12795 12 798	 CI-111242 - DSD BR CM 35a IMPLEMENTED	Wage Rate Change – Individual Provider (IP)	Processes when an Individual Provider Wage Rate Update is ordered by the client.	<p>Based upon the Payroll (Advantage) sends Multiple Pay Rate End (Job 10023) to CMIPS process Pay Rate Refresh Job (CMNR903A) using the client indicated [Wage Rate Effective Date].</p> <p>CMIPS will process the Wage Rate Update against all CMIPS cases and apply the following:</p> <p>If one of the Individual Provider Wage Rates is determined to be the "Highest County Rate"¹ and an Eligible or Presumptive Eligible Status case is indicated as Advance Pay apply the Wage Rate Update as follows:</p> <p>If the current Authorization End Date is prior to the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Wage Rate Effective Date] and process Activate Evidence – Suppress NOA <p>Then add an Assessment Type – Wage Rate Update</p> <p>Set Program Evidence Authorization Start Date = [Wage Rate Effective Date]</p> <p>Set Program Evidence Authorization End Date to last day of calendar month associated with [Wage Rate Effective Date]</p> <p>If the Advance Pay is indicated update the existing Advance Pay Rate to the new Pay Rate associated with the existing Step and Grade</p> <ul style="list-style-type: none"> • Process Activate Evidence – Suppress NOA <p>Else, the current Authorization End Date is on or after the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to previous Authorization Start Date <p>If the Advance Pay is indicated update the existing Advance Pay Rate to the new Rate associated with the existing Step and Grade</p> <p>Process Activate Evidence – Suppress NOA</p>

35b	12795	 CI-111243 - DSD BR CM 35b IMPLEMENTED	Wage Rate Change – County Contractor (CC)	<p>Processes when a County Contractor Wage Rate Update is ordered by the client.</p> <p>CMIPS process Wage Rate Update based upon the County Contractor [Wage Rate Effective Date]:</p> <p>If any County Contractor Wage Rate is not determined to be the "Highest County Rate" do not process Wage Rate Update against Recipient caseload.</p> <p>Else, if any County Contractor Wage Rate is determined to be the "Highest County Rate" and the Case Status is Eligible or Presumptive Eligible apply the Wage Rate Update as follows:</p> <p>If the current Authorization End Date is prior to the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Wage Rate Effective Date] and process Activate Evidence <p>Then add an Assessment Type – Wage Rate Update – Suppress NOA</p> <ul style="list-style-type: none"> • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to last day of calendar month associated with [Wage Rate Effective Date] – Suppress NOA <p>Else, the current Authorization End Date is on or after the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to previous Authorization Start Date and process Activate Evidence – Suppress NOA
35c	12795	 CI-111244 - DSD BR CM 35c IMPLEMENTED	Wage Rate Change – Homemaker (HM)	<p>Processes when a Homemaker Wage Rate Update is ordered by the client.</p> <p>CMIPS process Wage Rate Update based upon the Homemaker [Wage Rate Effective Date]:</p> <p>If any Homemaker Wage Rate is not determined to be the "Highest County Rate" do not process Wage Rate Update against Recipient caseload.</p> <p>Else, if any Homemaker Wage Rate is determined to be the "Highest County Rate" and the Case Status is Eligible or Presumptive Eligible apply the Wage Rate Update as follows:</p> <p>If the current Authorization End Date is prior to the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Wage Rate Effective Date] and process Activate Evidence – Suppress NOA <p>Then add an Assessment Type – Wage Rate Update</p> <ul style="list-style-type: none"> • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to last day of calendar month associated with [Wage Rate Effective Date] – Suppress NOA <p>Else, the current Authorization End Date is on or after the [Wage Rate Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Wage Rate Update • Set Program Evidence Authorization Start Date = [Wage Rate Effective Date] • Set Program Evidence Authorization End Date to previous Authorization Start Date and process Activate Evidence – Suppress NOA

36a	16661 16 664 16580	 36a IMPLEMENTED	Cost of Living Adjustment Processing – Benefit Level Increase – SOC Decrease	<p>Processes when a Cost of Living Adjustment (Payment Standards to the Benefit Level Table) is ordered by the client which indicates an increase.</p>	<p>Update CMIPS Wage Rate Table: Benefit Level Code Table with the increased Benefit Level, then for all CMIPS cases with:</p> <ul style="list-style-type: none"> • a Case Status of Eligible or Presumptive Eligible • an IHSS Aid Code is 18, 28 or 68 • Any Income Source <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. <p>If the current Authorization End Date is prior to the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Add an Assessment Type – Cost of Living Adjustment • Set Program Evidence Authorization Start Date to one day after previous Authorization End Date • Set Program Evidence Authorization End Date to one day before the [Benefit Level Effective Date] and process Activate Evidence – Suppress NOA <p>Then add an Assessment Type – Cost of Living Adjustment</p> <ul style="list-style-type: none"> • Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] • Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence – Produce NOA SC06 <p>Report case on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH</p> <ul style="list-style-type: none"> • If the current Authorization End Date is on or after the [Benefit Level Effective Date] • Create an Assessment Type – Cost of Living Adjustment • Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] <p>Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA SC06</p>
36b	16580 16 661 16664	 36b IMPLEMENTED	Cost of Living Adjustment Processing – Benefit Level Decrease – SOC Increase	<p>Processes when a Cost of Living Adjustment is ordered by the client which indicates a decrease to the Benefit Levels.</p>	<p>Update CMIPS Wage Rate Table: Benefit Level Code Table with the decreased Benefit Level, then for all CMIPS cases with:</p> <ul style="list-style-type: none"> • a Case Status of Eligible or Presumptive Eligible • an IHSS Aid Code is 18, 28 or 68 • Any Income Source <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. • If Pending Provider exists, Inactivate the Pending Provider <p>If the current Authorization End Date is prior to the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date to one day after previous Authorization End Date ◦ Set Program Evidence Authorization End Date to one day before [Benefit Level Effective Date] and process Final Determination – Suppress NOA • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ◦ Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence – Produce NOA SC03 ◦ Report case on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH <p>If the current Authorization End Date is on or after the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] <p>Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA SC03</p>

36c	16580 16 661 16664	CI-111247 - DSD BR CM 36c IMPLEMENTED	Cost of Living Adjustment Processing – Social Security Percentage Increase ^[1]	Processes when a Cost of Living Adjustment is ordered by the client increasing to the Social Security Percentage increase.	<p>Update CMIPS Wage Rate Table: Deductions Code Table with the increased Social Security Percentage then for CMIPS cases with:</p> <ul style="list-style-type: none"> • a Case Status of Eligible or Presumptive Eligible • an IHSS Aid Code is 18, 28 or 68 • And the Income Source is Retirement, Survivors, Disability Insurance (RSI) – Recipient <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none"> • If Pending Evidence exists, delete Pending Evidence. • If Pending Provider exists, Inactivate the Pending Provider <p>If the current Authorization End Date is <u>prior</u> to the [Benefit Level Effective Date]</p> <ul style="list-style-type: none"> • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date to one day after previous Authorization End Date ◦ Set Program Evidence Authorization End Date to one day before [Benefit Level Effective Date] and process Final Determination – Suppress NOA • Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ◦ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ◦ Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence – Produce NOA SC04 <ul style="list-style-type: none"> ▪ Case will be reported on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH • If the current Authorization End Date is <u>on or after</u> the [Benefit Level Effective Date] <ul style="list-style-type: none"> ◦ Create an Assessment Type – Cost of Living Adjustment <ul style="list-style-type: none"> ▪ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date] ▪ Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA SC04 <p>If any Income Source indicates SOCIS002 report case on SOC COLA WARNING REPORT – VET ADMIN BENEFIT CODE 2</p>
37	16818	CI-111248 - DSD BR CM 37 IMPLEMENTED	Update County Contractor Status	When the Modify County Contractor screen is saved and a Warrant Number and Paid Date are indicated	<ul style="list-style-type: none"> • Set the County Contractor status to Paid • Display Contract Expenditures Form link on the County Contract Coordinator – View County Contractor
38	12354	CI-111249 - DSD BR CM 38 IMPLEMENTED	Withdraw Case	When the Save link is selected on the Withdraw Case Screen	Send IH34 to MEDS if IH18 was previously sent Send S8 if Medi-Cal Aid Code is not 10, 20 or 60 *If a case is created and the Withdrawal action occurs on the same day, no transaction will be sent.
39	12634	CI-111250 - DSD BR CM 39 IMPLEMENTED	Send IHO/WPCS Paid Claims	When IHO/WPCS Paid Claims job is run via batch scheduler.	Paid claims for prior month for the WPCS payments are sent to IHO
40			Cancelled with CR 1269		

¹ Highest County Rate – Compare all Individual Provider, and if applicable County Contractor and Homemaker rates. Whichever rate is the highest will be considered the “Highest County Rate” and is used in determining the “Case SOC Compare Cost”.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (41-50)

No	Req ID	CI	Description	When	Action
41			Removed		
42			Removed		
43			Removed		
44			Removed		
45			Removed		
46			Removed		
47			Removed		
48	12149 21262	 CI-111252 - DSD BR CM 48 IMPLEMENTED	SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS Applicant/Recipient – Includes SSN Update	When an S2 transaction is received and the indicated IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is "Pending" take the following action:	<p>If the Applicant CIN on the S2 does not match the CIN on the Person record associated with the IHSS Case Number</p> <p>AND</p> <p>Does not match an Active (non-end dated) CIN Alternative ID value for another person in CMIPS</p> <p>OR IF the Applicant SSN on the S2 does not match the SSN on the Person record associated with the IHSS Case Number</p> <p>AND</p> <p>Does not match an Active (non-end dated) SSN Alternative ID value for another person in CMIPS</p> <p>THEN</p> <ul style="list-style-type: none"> Set 'To' date on Prior Person Record Alternative ID – SSN to (1) day prior to the transaction processing date Create New Person Record Alternative ID – SSN with 'From' date to the transaction processing date <p>If new Applicant SSN record has been created, then:</p> <ul style="list-style-type: none"> Produce Notification to the Case Owner– [case name] [case number] Recipient's SSN has been changed (DSD NOTF TN CM 41) <p>AND THEN</p> <p>Populate the following to the SAWS Eligibility Information Screen:</p> <ul style="list-style-type: none"> Last Updated – Date S2 Transaction was processed in CMIPS: Update Type – Code Table Value S2 – Notification of CIN creation or update for IHSS applicant/Recipient <p>If Applicant CIN (CIN + CIN Check Digit) does not match the CIN or the CIN is blank on the Person record associated with the IHSS Case Number</p> <ul style="list-style-type: none"> Update Person Record Alternative ID – CIN Set the Alternate ID CIN From date to the date the transaction was processed <p>If any of the following Applicant Name fields do not match the corresponding Name fields on the Person record associated with the IHSS Case Number update CMIPS Person Record:</p> <ul style="list-style-type: none"> Applicant Last Name – Person Last Name Applicant First Name – Person First Name Applicant Middle Initial – Person Middle Name Applicant Suffix – Person Suffix <p>If Last Name, First Name or Middle Initial, set Name Change Effective Date to date transaction is processed</p> <p>If the Applicant Gender does not match the corresponding Gender on the Person record associated with the IHSS Case Number update the CMIPS Person Gender</p> <ul style="list-style-type: none"> Produce Notification to the Case Owner– [Case Number] [Person Name] gender updated by SAWS (DSD NOTF TN CM 44) <p>If the Applicant Date of Birth does not match the corresponding Date of Birth on the Person record associated with the IHSS Case Number update the CMIPS Person Date of Birth</p> <ul style="list-style-type: none"> Produce Notification to the Case Owner– [Case Number] [Person Name] date of birth updated by SAWS (DSD NOTF TN CM 42) <p>Apply or update any of the following data:</p> <ul style="list-style-type: none"> Medi-Cal Status Medi-Cal Status Effective Date Medi-Cal Status Reason SAWS Eligibility Worker First Name SAWS Eligibility Worker Last Name SAWS Eligibility Worker Phone SAWS Eligibility Worker Email

49	12149	 CI-111253 - DSD BR CM 49 IMPLEMENTED	SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS Case Number and the CMIPS Case Status is other than "Pending" take the following action:	When an S2 transaction is received and the IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is other than "Pending" take the following action: Populate the following to the SAWS Eligibility Information Screen: <ul style="list-style-type: none">• Last Updated – Date S2 Transaction was processed in CMIPS:• Update Type – Code Table Value S2 – Notification of CIN creation or update for IHSS applicant/Recipient Apply or update any of the following data: <ul style="list-style-type: none">• Medi-Cal Status• Medi-Cal Status Effective Date• Medi-Cal Status Reason• SAWS Eligibility Worker First Name• SAWS Eligibility Worker Last Name• SAWS Eligibility Worker Phone• SAWS Eligibility Worker Email
50	12263 16954 21207	 CI-111254 - DSD BR CM 50 IMPLEMENTED	SAWS Daily Receive (CMDR4XXA) S3 – Notification of Medi-Cal Status	When an S3 transaction is received and processed by CMIPS: Set SAWS Eligibility Information Last Updated to the date the SAWS Daily Receive file is processed AND Set SAWS Eligibility Information Update Type –S3 – Notification of Medi-Cal Status AND If the Medi-Cal Status changes from Pending to Approved, then set the IHSSCase: mediCalEligNotifyDate with the date the SAWS Daily Receive file is processed produce Notification to the Case Owner– [case name] [case number] Initial Medi-Cal Eligibility Received AND If Medi-Cal Status changes from Discontinued to Approved, then produce Notification to the Case Owner– [case name] [case number] SAWS rescission of discontinuance. AND Produce Task to the Case Owner– [case name] [case number] SAWS discontinuance of IHSS Recipient effective [Medi-Cal Status Effective Date] for [Medi-Cal Status Reason] AND IF MEDI-CAL STATUS = Discontinued AND If MEDS MEDI-CAL STATUS REASON = 03 (Discontinuance at recipient request, MC only, CalWORKs/MC) OR MEDS MEDI-CAL STATUS REASON = 04 (Failure to cooperate) OR MEDS MEDI-CAL STATUS REASON = 50 (Refused to comply – property utilities requirement) (Not applicable to IHSS) OR MEDS MEDI-CAL STATUS REASON = 60 (Refused to provide CA7 or Medi-Cal Status report) OR MEDS MEDI-CAL STATUS REASON = 61 (Refused to provide essential information (non-CA7)) OR MEDS MEDI-CAL STATUS REASON = 64 (Failed to complete Medi-Cal Midyear Status Review) OR MEDS MEDI-CAL STATUS REASON = 65 (Failed to complete Annual Medi-Cal RV) OR MEDS MEDI-CAL STATUS REASON = 89 (Whereabouts unknown – Medi-Cal) OR MEDS MEDI-CAL STATUS REASON = 97 (Discontinued at recipient request) THEN Set the start date of the Termination Auth segment 13 calendar days from the current date (current date is not counted) if the 13th day falls within the current calendar month ELSE IF The 13th day falls within the next calendar month, set the start date of the Termination Auth segment to be the first day of the next future calendar month. AND Generate TR25 NOA. AND Produce Notification to Case Owner– [case name] [case number] Case Terminated due to SAWS discontinuance of IHSS Recipient effective [discontinuance date] for reason [discontinuance reason] AND Do not produce an IH40 transaction AND IF the case is undergoing an In-Progress ICT THEN the case receives an ICT cancel date when the termination occurs ELSE the case has completed an ICT THEN the ICT is not cancelled AND

				<p>IF the assessment is past due THEN the assessment end date is updated to the last day of the month in which the termination occurs and the termination begin date becomes the first day of the following month</p> <p>AND</p> <p>IF the case has any pending evidence THEN delete pending evidence and display on the Evidence History screen</p> <p>AND</p> <p>IF the case has any pending flexible hours segments THEN deactivate the segments AND cancellation letter (DHCS 2269) is not triggered</p> <p>AND</p> <p>IF Future Authorization with Termination or Leave exists THEN Authorization error is bypassed</p>
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (51-60)

No	Req ID	CI	Description	When	Action
51	12264	↳ CI-111255 - DSD BR CM 51 IMPLEMENTED	Rescind Case	When the Rescind Case link is selected on the Case Home and the date of action is in a month for which the case has a Medi-Cal Eligibility record which has active Medi-Cal Eligibility	Display the Rescind Case pop-up without the Client Index Number search link
52	12264	↳ CI-111256 - DSD BR CM 52 IMPLEMENTED	Rescind Case	When the Rescind Case link is selected on the Case Home and the date of action is in a month for which the case has a Medi-Cal Eligibility record which does not have active Medi-Cal Eligibility	Display the Rescind Case pop-up with the Client Index Number search link Client Index Number field is blank
53	12264	↳ CI-111257 - DSD BR CM 53 IMPLEMENTED	Rescind Case	When the Rescind Case link is selected on the Case Home and the date of action is in a month for which the case does not have a Medi-Cal Eligibility record	Display the Rescind Case pop-up with the Client Index Number search link Client Index Number field is blank
54	12264	↳ CI-111258 - DSD BR CM 54 IMPLEMENTED	Rescind Denied Case without CIN Selection	When the Save link on the "Rescind Case without Client Index Number search" screen is selected and: <ul style="list-style-type: none">• Case Status was Denied• Medi-Cal Aid Code is 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Pending Send IH18 Transactions to MEDS
55	12264	↳ CI-111259 - DSD BR CM 55 IMPLEMENTED	Rescind Denied Case without CIN Selection	When the Save link on the "Rescind Case without Client Index Number search" screen is selected and: <ul style="list-style-type: none">• Case Status was Denied• Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Pending Send IH18 Transactions to MEDS Send S8 Transaction to SAWS
56	12264	↳ CI-111260 - DSD BR CM 56 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Eligible And the Medi-Cal Aid Code is 10, 20 or 60 for the current Medi-Cal Eligibility Month	Set the Case Status to Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS
57	12264	↳ CI-111261 - DSD BR CM 57 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Eligible And the Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS Send S8 Transaction to SAWS

58	12264	 CI-111262 - DSD BR CM 58 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Presumptive Eligible And the Medi-Cal Aid Code is 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Presumptive Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS
59	12264	 CI-111263 - DSD BR CM 59 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: The Case Status was Terminated And the Case Status prior to Termination was Presumptive Eligible And the Medi-Cal Aid Code is other than 10, 20 or 60 for current Medi-Cal Eligibility Month	Set the Case Status to Presumptive Eligible Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS Send S8 Transaction to SAWS
60	12264	 CI-111264 - DSD BR CM 60 IMPLEMENTED	Rescind Terminated Case without CIN Selection	When the Save link is selected on the "Rescind Case without Client Index Number search" screen and: Case Status was Terminated Case Status prior to Termination was Leave Medi-Cal Aid Code is 10, 20 or 60	Set the Case Status to Leave Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Send IH20 Transactions to MEDS

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (61-70)

No	Req ID	CI	Description	When	Action
61	12264	CI-111265 - DSD BR CM 61 IMPLEMENTED	Rescind Terminated Case without CIN Selection	<p>When the Save link is selected on the "Rescind Case without Client Index Number search" screen and:</p> <p>Case Status was Terminated</p> <p>Case Status prior to Termination was Leave</p> <p>Medi-Cal Aid Code is other than 10, 20 or 60</p>	<p>Set the Case Status to Leave</p> <p>Set Authorization Start Date to Authorization Start Date prior to Termination</p> <p>Set Authorization End Date to Authorization End Date prior to Termination</p> <p>Send IH20 Transactions to MEDS</p> <p>Send S8 Transaction to SAWS</p>
63	12264	CI-111266 - DSD BR CM 63 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination was a Future Date to Rescind Action	<p>When the Save link on the "Rescind Case with Client Index Number search" screen is saved and:</p> <p>Case Status was Terminated</p> <p>Case Status prior to Termination was Eligible or Presumptive Eligible</p> <p>Authorization End Date prior to Termination is a date future to the Rescind Case Action</p> <p>CIN selected matches the CIN previously on the case</p> <p>Selected CIN has Active Medi-Cal</p> <p>Medi-Cal Aid Code is 10, 20 or 60</p>	<p>Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date</p> <p>Build Change Assessment</p> <p>Set Authorization Start Date to Authorization Start Date prior to Termination</p> <p>Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status</p> <p>Process Final Determination without triggering NOA</p> <p>Build Change Assessment</p> <p>Set Authorization Start Date is the first date of the month following the prior Authorization Period.</p> <p>Set the Authorization End Date to the Authorization End Date prior to the Case Termination</p> <p>Process Final Determination with NOA triggers</p> <p>Send IH20 Transactions to MEDS</p>
64	12264	CI-111267 - DSD BR CM 64 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination is a date Future to the Rescind Case action	<p>When the Save link on the "Rescind Case with Client Index Number search" screen is saved and:</p> <p>Case Status was Terminated</p> <p>Case Status prior to Termination was Eligible or Presumptive Eligible</p> <p>Authorization End Date prior to Termination is a date future to the Rescind Case Action</p> <p>CIN selected matches the CIN previously on the case</p> <p>Selected CIN has Active Medi-Cal</p> <p>Medi-Cal Aid Code is not 10, 20 or 60</p>	<p>Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date</p> <p>Build Change Assessment</p> <p>Set Authorization Start Date to Authorization Start Date prior to Termination</p> <p>Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status</p> <p>Process Final Determination without triggering NOA</p> <p>Build Change Assessment</p> <p>Set Authorization Start Date is the first date of the month following the prior Authorization Period.</p> <p>Set the Authorization End Date to the Authorization End Date prior to the Case Termination</p> <p>Process Final Determination with NOA triggers</p> <p>Send IH20 Transactions to MEDS</p> <p>Send S8 Transaction to SAWS</p>

65	12264	CI-111268 - DSD BR CM 65 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination was a date before the Rescind Action	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Terminated Case Status prior to Termination was Eligible or Presumptive Eligible Authorization End Date prior to Termination is a date before the Rescind Case Action CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is 10, 20 or 60	Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Build Change Assessment Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status Process Final Determination without triggering NOA Build Change Assessment Set Authorization Start Date is the first date of the month following the prior Authorization Period. Set the Authorization End Date to the last day of the Authorization Start Date Process Final Determination with NOA triggers Send IH20 Transactions to MEDS
66	12264	CI-111269 - DSD BR CM 66 IMPLEMENTED	Rescind Terminated Case – with CIN Selection Authorization End Date prior to Termination was a date before the Rescind Action	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Terminated Case Status prior to Termination was Eligible or Presumptive Eligible Authorization End Date prior to Termination is a date before the Rescind Case Action CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is not 10, 20 or 60	Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Build Change Assessment Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to last day of the month of the last month for which a Medi-Cal Eligibility record exists with an active Medi-Cal Eligibility Status Process Final Determination without triggering NOA Build Change Assessment Set Authorization Start Date is the first date of the month following the prior Authorization Period. Set the Authorization End Date to the last day of the Authorization Start Date Process Final Determination with NOA triggers Send IH20 Transactions to MEDS Send S8 Transaction to SAWS
67	12027	CI-111270 - DSD BR CM 67 IMPLEMENTED	Build Medi-Cal Eligibility Month record	CMIPS will build a Medi-Cal Eligibility Month record when: MEDS Monthly Renewal is processed and a MEDS Monthly Renewal record is not received for an CMIPS case in Pending Eligible, Presumptive Eligible or Leave status	Medi-Cal Eligibility Record data will be: <ul style="list-style-type: none">• ELIGIBILITY MONTH - MEDS Monthly Renewal "Eligibility Month/Year"• LAST UPDATED – Current Date• RECORD TYPE = No MEDS Eligibility• FFP = N• BIC ISSUE DATE – Same as BIC Issue Date on prior MEDS Eligibility Month record• CIN = Same as CIN + Check Digit on prior MEDS Eligibility Month record• MEDICAL DATE OF BIRTH – Same as Medi-Cal Date of Birth on prior MEDS Eligibility Month record• MEDICAL COUNTY ID – Same as the Medi-Cal County ID on prior MEDS Eligibility Month record All other data elements will default to blank Trigger Task Trigger Task "[case name] [case number] Medi-Cal Eligibility Termination".
68	16026	CI-111271 - DSD BR CM 68 IMPLEMENTED	Build Medi-Cal Eligibility Month record	When the Rescind Case action occurs and the CIN selected has active Medi-Cal and no MEDS Eligibility record exists for the Eligibility Month in which the action is take or a previous month	Medi-Cal Eligibility Record data will be created from OM Transaction data and set MEDS Transaction Type to SCI OM Transaction

69	12264	 CI-111272 - DSD BR CM 69 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	<p>When the Save link on the "Rescind Case with Client Index Number search" screen is saved and:</p> <p>Case Status was Terminated</p> <p>Case Status prior to Termination was Leave</p> <p>CIN selected matches the CIN previously on the case</p> <p>Selected CIN has Active Medi-Cal</p> <p>Medi-Cal Aid Code is 10, 20 or 60</p>	<p>Set Status to Leave</p> <p>Set Authorization Start Date to Authorization Start Date prior to Termination</p> <p>Set Authorization End Date to Authorization End Date prior to Termination</p> <p>If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data</p> <p>Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date</p> <p>Send IH20 Transactions to MEDS</p>
70	12264	 CI-111273 - DSD BR CM 70 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	<p>When the Save link on the "Rescind Case with Client Index Number search" screen is saved and:</p> <p>Case Status was Terminated</p> <p>Case Status prior to Termination was Leave</p> <p>CIN selected matches the CIN previously on the case</p> <p>Selected CIN has Active Medi-Cal</p> <p>Medi-Cal Aid Code is not 10, 20 or 60</p>	<p>Set Status to Leave</p> <p>Set Authorization Start Date to Authorization Start Date prior to Termination</p> <p>Set Authorization End Date to Authorization End Date prior to Termination</p> <p>If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data</p> <p>Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date</p> <p>Send IH20 Transactions to MEDS</p> <p>Send S8 Transaction to SAWS</p>

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (71-80)

No	Req ID	CI	Description	When	Action
71	12264	CI-111274 - DSD BR CM 71 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Denied CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is 10, 20 or 60	Set Status to Pending If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data <ul style="list-style-type: none"> Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Send IH34 Transactions to MEDS
72	12264	CI-111275 - DSD BR CM 72 IMPLEMENTED	Rescind Terminated Case – with CIN Selection	When the Save link on the "Rescind Case with Client Index Number search" screen is saved and: Case Status was Denied CIN selected matches the CIN previously on the case Selected CIN has Active Medi-Cal Medi-Cal Aid Code is not 10, 20 or 60	Set Status to Pending If Rescind month is the same month as the last Medi-Cal Eligibility Month record, update Medi-Cal Eligibility with OM Transaction data <ul style="list-style-type: none"> Build Medi-Cal Eligibility Month records, using OM Transaction data, for all months between Last Medi-Cal Eligibility record and the current date Send IH34 Transactions to MEDS Send S8 Transaction to SAWS
76	12492	CI-111276 - DSD BR CM 76 IMPLEMENTED	Modify Homemaker Timesheet screen	When the Save link is selected on the Modify Homemaker Timesheet screen and the current Status is Rejected	Update the Status to Not Submitted
77	12007 16 970	CI-111277 - DSD BR CM 77 IMPLEMENTED	Update Funding Source	When Funding Source Update processing is required and the Authorization End Date of the current Active Evidence is a date in the past CMIPS shall create and Authorization Period for the missing period of time to fill the missing period:	<ul style="list-style-type: none"> If Pending Evidence exists, Delete Pending Evidence If Pending Provider exists, Inactivate the Pending Provider <p>Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date</p> <ul style="list-style-type: none"> Set the Authorization Start Date to the day following the previous Authorization End Date Set the Authorization End Date to the first day of the month prior to the calendar month in which the current Funding Source Update will apply. Process Final Determination suppressing resulting NOA.
78	12007 12447 12448 16970	CI-111278 - DSD BR CM 78 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established through the processing of Final Determination of an Initial, Change, Reassessment, Telehealth, or Inter-County Transfer Assessment, CMIPS shall evaluate the IHSS Funding Source when the Medi-Cal Eligibility FFP changes from Yes to No (FFP = Y to FFP = N)	<p>When MEDS Daily Update or MEDS Monthly Renewal processes and the MEDS Eligibility month being processed already exists and if the FFP changes from Y to N or if MEDS Eligibility month being processed has an FFP change from Y to N compared with the prior MEDS Eligibility month and the previous Funding Source is PCSP, CFCO or IPO</p> <ul style="list-style-type: none"> If Pending Evidence exists, Delete Pending Evidence If Pending Provider exists, Inactivate the Pending Provider <p>Create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.</p> <ul style="list-style-type: none"> Set Authorization Start Date to the first day of the next service month where no payments have been issued Set the Authorization End Date to the Authorization End Date on the previous assessment; if that date is in a month future to the month in which the action is being taken Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) <p>Process Final Determination producing applicable NOA (Changes Funding Source from PCSP, CFCO or IPW/IPO to IHSS-R) bypass edit for 10 day notification for NOA.</p>
79	12007 12447 12448 16666 16 970	CI-111279 - DSD BR CM 79 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established through the processing of Final Determination of an Initial, Change, Reassessment, Telehealth, or Inter-County Transfer Assessment, CMIPS shall evaluate the IHSS Funding Source when Medi-Cal Eligibility FFP changes from No to Yes (FFP = N to FFP = Y)	<p>When MEDS Daily Update or MEDS Monthly Renewal processes and the MEDS Eligibility month being processed already exists and if the FFP changes from N to Y or if MEDS Eligibility month being processed has an FFP change from N to Y compared with the prior MEDS Eligibility month</p> <ul style="list-style-type: none"> If Pending Evidence exists, Delete Pending Evidence If Pending Provider exists, Inactivate the Pending Provider <p>Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.</p> <ul style="list-style-type: none"> Set Authorization Start Date to the first day of the service month for which the FFP change applies if no payments have been issued for that service month. Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which payment has not been issued Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current month, in which the action is being taken Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) If Presumptive Eligibility is indicated, deselect the Presumptive Eligible indication <p>Process Final Determination producing applicable NOA (Changes Funding Source from IHSS-R to IPW/IPO, CFCO or PCSP)</p>

80	<p>12007 12447 12448 16 666 16970</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;">  CI-111280 - DSD BR CM 80 IMPLEMENTED </div>	Update Funding Source	<p>Once an Eligible Authorization is established CMIPS shall evaluate each case at the end of a calendar month prior to the month in which the "Recipient turns 18"</p> <p>When the Recipient turns 18 and the previous Funding Source was IHSS-R, CFCO or PCSP, no Funding Source Update needed (Funding Source remains IHSS-R, CFCO or PCSP).</p> <ul style="list-style-type: none"> If Funding Source was IHSS-R or CFCO And any Provider Relationship to Recipient is "Parent of minor child" change to "Parent of Adult Child" Update Relationship Status Date to the first day of the month in which the Recipient turns 18 <p>If previous Funding Source is IPO5 and a Provider with the "Relationship to Recipient" is "Parent of Minor Child" is active on the case and any combination of the following exist on the case no Funding Source Update is needed (Funding Source remains IPO5)</p> <ul style="list-style-type: none"> Advance Pay Restaurant Meals Spouse Provider <p>Else, if previous Funding Source is IPO5 because a Provider has a Relationship to the Recipient of "Parent of a Minor Child" and only one of the following (Funding Source changes from IP05 to IP01, IP02 or IP04)</p> <ul style="list-style-type: none"> Advance Pay Restaurant Meals Spouse Provider Change Provider record(s) "Relationship to Recipient" from "Parent of minor child" to "Parent of an Adult Child" Update Relationship Status Date to the first day of the month in which the Recipient turns 18. Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date Set Authorization Start Date to the first day of the service month in which the "Recipient Turns 18" if no payments have been issued for that service month <p>Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has not been issued</p> <ul style="list-style-type: none"> Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the month, in which the action is being taken <p>Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility)</p> <ul style="list-style-type: none"> Process Final Determination producing applicable NOA (Changes from IPO5 to IP01, IP02 or IPO4). Else Funding Source is IPO3 Change Provider record(s) "Relationship to Recipient" from "Parent of minor child" to "Parent of an Adult Child" Update Relationship Status Date to the first day of the month in which the Recipient turns 18. Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date Set Authorization Start Date to the first day of the service month in which the "Recipient turns 18" if no payments have been issued for that service month <p>Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has not been issued</p> <ul style="list-style-type: none"> Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current month, in which the action is being taken <p>Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) Process Final Determination producing applicable NOA (Changes from IPO3 to PCSP).</p>
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (81-90)

No	Req ID	CI	Description	When	Action
81	12007 12299 12447 12448 16 666 16671 16945 16970	 CI-111281 - DSD BR CM 81 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is terminated with a Relationship to Recipient of "Parent of minor child".	<p>When a Provider is Terminated and the "Relationship to Recipient" is "Parent of minor child" and the previous Funding Source is IHSS-R or CFCO, no Funding Source Update needed (Funding Source remains IHSS-R or CFCO),</p> <ul style="list-style-type: none"> Else if previous Funding Source is IPO5 and the case has any combination of the following, Advance Pay and/or Restaurant Meals and /or a Provider with the Relationship to the Recipient of Spouse, and /or has a Provider with the Relationship to the Recipient is "Parent of minor child", apart from the Provider being terminated, no Update Funding Source action required (Funding Source remains IPO5) Else if Previous Funding Source is IPO5 and has any one of the following, Advance Pay or Restaurant Meals or a Provider with the Relationship to the Recipient of Spouse Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date Set Authorization Start Date to the first day of the service month following the month in which the Provider is terminated if no payments have been issued for that service month Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) Process Final Determination producing applicable NOA (Changes from IPO5 to IPO1, IPO2, or IPO4). Else previous Funding Source is IPO3 and there is another Provider with the Relationship to the Recipient of "Parent of minor child", apart from the Provider being terminated no Funding Source Update needed (Funding Source remains IPO3) Else previous Funding Source is IPO3 Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date Set Authorization Start Date to the first day of the service month following the month in which the Provider is terminated if no payments have been issued for that service month Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) Process Final Determination producing applicable NOA (Changes from IPO3 to PCSP or CFCO).

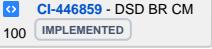
82	12007 12299 12447 12448 16 666 16970	CI-111282 - DSD BR CM IMPLEMENTED	Update Funding Source	<p>Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is added with a Relationship to Recipient of "Parent of a minor child"</p>	<p>If a Provider is added with a "Relationship to Recipient" of "Parent of minor child" and the previous Funding Source is IHSS-R, CFCO, IPO3 or IPO6 no Funding Source Update action required (Funding Source remains IHSS-R, CFCO).</p> <ul style="list-style-type: none"> • Else if previous Assessment was Initial • And the Begin Date of the Parent of a Minor Child Provider being added is equal to or within the same calendar month as Authorization Start Date of Initial Assessment and no payments have been issued for the Authorization Start Date month • Create an Assessment Type of "Funding Source Update" – Cloning all Initial Assessment Evidence and set the Authorization Start Date to the Authorization Start Date of the Initial Assessment • Set Authorization End Date to the Authorization End Date of the Initial Assessment • Process Final Determination producing applicable NOA (Changes from PCSP, IPO1 or IPO2 to IPO3 or IPO5) bypass edit for 10 day notification for NOA. • Otherwise set Authorization Start Date to the first day of the next service month for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP, IPO1, or IPO2 to IPO3 or IPO5). • Else if previous Assessment Type is not Initial and Funding Source IPO1, IPO2, or IPO4 • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month following the month in which the Provider is added if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes from IPO1, IPO2, IPO4 to IPO5). • Else the previous Funding Source is PCSP • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the next service month in which the Provider is added and for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP to IPO3).
83	12007 12299 12447 12448 16 666 16671 16945 16970	CI-111283 - DSD BR CM IMPLEMENTED	Update Funding Source	<p>Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is terminated with a Relationship of Spouse</p>	<p>If a Provider is Terminated with a "Relationship to Recipient" of "Spouse" and the previous Funding Source is IHSS-R or CFCO, no Funding Source Update action required (Funding Source remains IHSS-R or CFCO).</p> <ul style="list-style-type: none"> • Else if previous Funding Source is IPO 5 and case has any combination of the following, Advance Pay and/or Restaurant Meals and/or a Provider with the Relationship to the Recipient of Parent of a Minor Child, no Funding Source Updated action required (Funding Source remains IPO5). • Else if previous Funding Source is IPO5 and has any one of the following, Advance Pay or Restaurant Meals or a Provider with the "Relationship to the Recipient" of "Parent of a Minor Child", other than the one being terminated • Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month after which the Provider is terminated if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes Funding Source from IPO5 to IPO1, IPO2, IPO3) bypass edit for 10 day notification for NOA. • Else previous Funding Source is IPO4 • Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month after which the Provider is terminated if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes Funding Source from IPO4 to PCSP).

84	12007 12299 12447 12448 16 666 16970	CI-111284 - DSD BR CM 84 IMPLEMENTED	Update Funding Source	Once an Eligible Authorization is established through the processing of Final Determination CMIPS shall evaluate the IHSS Funding Source when a Provider is added with a Relationship to Recipient of Spouse	If a Provider is added with a Relationship to Recipient of "Spouse" and the previous Funding Source is IHSS-R, CFCO or IPO5 no Funding Source Update action required (Funding Source remains IHSS-R, CFCO or IPO5). <ul style="list-style-type: none"> • Else if previous Assessment Type was Initial • and the Begin Date of the "Spouse" Provider being added is equal to or within the same calendar month as Authorization Start Date of Initial Assessment and no payments have been issued for the Authorization Start Date month • Create an Assessment Type of "Funding Source Update" – Cloning all Initial Assessment Evidence and set the Authorization Start Date to the Authorization Start Date of the Initial Assessment • Set Authorization End Date to the Authorization End Date of the Initial Assessment • Process Final Determination producing applicable NOA (Changes from PCSP, IPO1 or IPO2 to IPO4 or IPO5) bypass edit for 10 day notification for NOA. • Otherwise set Authorization Start Date to the first day of the next service month for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP, IPO1, or IPO2 to IPO3 or IPO5). • Else if previous Funding Source is IPO1, IPO2, or IPO3 • Create an Assessment Type of "Funding Source Update" cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the service month after which the Provider is added if no payments have been issued for that service month • Otherwise, set the Authorization Start Date to the first day of a subsequent service month for which no payment has been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is future to the derived Authorization Start Date • Otherwise, set the Authorization End Date to the last day of the derived Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA (Changes Funding Source from IPO1, IPO2, IPO3 or IPO5). • Else the previous Funding Source is PCSP • Create an Assessment Type of "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date • Set Authorization Start Date to the first day of the next service month in which the Provider is added and for which no payments have been issued • Set the Authorization End Date to the Authorization End Date of the previous assessment if that date is in a month future to the current Assessment Authorization Start Date • Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) • Process Final Determination producing applicable NOA bypassing edit for 10 day notification for NOA (Funding Source changes from PCSP to IPO4).
85	16882	CI-118144 - DSD BR CM 85 IMPLEMENTED	Terminate Case	When the Save link is selected on the Terminate Case screen AND the Reason is "Health Care Certification – Not Received"	<ul style="list-style-type: none"> • Set the case Status to Terminated • Trigger NOA TR22 – Health Care Certification – Not Received
86	16892	CI-123879 - DSD BR CM 86 IMPLEMENTED	Modify Hours Reduction	When the Reduced Hours percentage and associated dates are modified	<ul style="list-style-type: none"> • Apply percentage and associated date changes to Reduce Hours Control Table per CDSS request • Set Reduced Hours Control Table Start Date to CR requested Start Date • Set Reduced Hours Control Table Percentage to CR requested percentage. • Build Missing Period • If current Active Evidence Authorization End Date is prior to current Reduced Hours Start Date • Create Assessment Type State Mandated Change cloning all prior Evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to one day prior to the Reduced Hours Start Date • Process Final Determination – Suppress NOA • Process Modify Reduced Hours • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to last day of the Reduced Hours Start Date month (one month eligibility) • Process Final Determination – Producing all applicable NOAs • Else current Active Evidence Authorization End Date is after Reduced Hours Start Date • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to Reduced Hours Start Date • Set Authorization End Date to previous Evidence Authorization End Date • Process Final Determination – Producing all applicable NOAs • Provider Hours will be updated based upon Final Determination Business Rules 66a – 66d

87	16830	 CI-123880 - DSD BR CM 87 IMPLEMENTED	Modify LMA	When the LMA is modified	<ul style="list-style-type: none"> • Apply Changes to LMA Control Table • Update LMA Control Table Start Date • Change LMA Control Table Percentage • Change LMA Control Table W & I Code • If Pending Evidence exists, delete the Pending Evidence. • Build Missing Period • If current Active Evidence Authorization End Date is in a month prior to the current LMA Start Date • Create Assessment Type State Mandated Change cloning all prior Evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to one day prior to the LMA Start Date • Process Final Determination – Suppress NOA • Process Modify LMA • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to one day after the prior assessment Authorization End Date • Set the End Date to the last day of the LMA Start Date month (one month eligibility) • Process Final Determination – Producing all applicable NOAs • Else current Active Evidence Authorization End Date is after LMA Start Date • Create Assessment Type State Mandated Change cloning all previous assessment evidence • Set Authorization Start Date to LMA Start Date • Set Authorization End Date to previous Evidence Authorization End Date • Process Final Determination – Producing all applicable NOAs • Provider Hours will be updated based upon Final Determination Business Rules 66a – 66d
88	16928	 CI-437237 - DSD BR CM 88 IMPLEMENTED	Clone Assessment Narrative – User added assessment	When a user creates any Assessment Type other than Initial or Inter-County Transfer	The Assessment Narrative from the most recent Active Evidence is cloned to Pending Evidence
89	16929	 CI-437238 - DSD BR CM 89 IMPLEMENTED	Clone Assessment Narrative – batch processing assessment	When a an assessment is created through batch processing	The Assessment Narrative from the most recent Active Evidence is cloned to the system-generated assessment
90	16062	 CI-437233 - DSD BR CM 90 IMPLEMENTED	MEDS Daily - Disability Determination Task	<p>When a MEDS Daily record is received and the Disability Determination Date is indicated</p> <p>and the current MEDS Eligibility record does not have the Disability</p> <p>Determination Date indicated</p> <p>and the current case status is Pending, Eligible, Presumptive Eligible or Leave and no "Open" "Disability Determination received from Medi-Cal" task exists</p>	Trigger the "Disability Determination received from Medi-Cal" task

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (91-100)

No	Req ID	CI	Description	When	Action
91	16062	 CI-437234 - DSD BR CM 91 IMPLEMENTED	MEDS Monthly Renewal - Disability Determination Task	When a MEDS Monthly Renewal record is received and the Disability Determination Date is indicated and the current MEDS Eligibility record does not have the Disability Determination Date indicated and the current case status is Pending, Eligible, Presumptive Eligible or Leave and no "Open" "Disability Determination received from Medi-Cal" task exists	Trigger the "Disability Determination received from Medi-Cal" task
92	16126	 CI-437235 - DSD BR CM 92 IMPLEMENTED	MEDS Daily – Recipient Death Notification – Source MEDS	When a MEDS Daily record is received and indicates a "Death Date" and the current MEDS Eligibility record does not have the Death Date field indicated and no "Open" "Recipient Death Notification – Source MEDS" task exists	Trigger the "Recipient Death Notification – Source MEDS" task
93	16052	 CI-444456 - DSD BR CM 93 IMPLEMENTED	Send MEDS ID	When any MEDS Transaction is triggered the CMIPS Alternate ID Type MEDS ID is present	<ul style="list-style-type: none"> Send the CMIPS Alternate ID Type MEDS ID Or, if no Alternate ID Type MEDS ID, send Alternate ID Type Social Security Number
94	16937	 CI-444457 - DSD BR CM 94 IMPLEMENTED	CIN Re-Clearance	When the Save link is selected on the Create Alternate ID Type Client Index Number and the Alternate ID is other than blank and the Case Status is Eligible, Presumptive Eligible or Leave	Send an IH20 to MEDS
95	16937	 CI-444458 - DSD BR CM 95 IMPLEMENTED	CIN Re-Clearance	When the Save link is selected on the Create Alternate ID Type Client Index Number and the Alternate ID number other than blank and the Case Status is Pending	Send an IH18 to MEDS
96	16939	 CI-444533 - DSD BR CM 96 IMPLEMENTED	Modify Medi-Cal Eligibility – Eligibility Month Change	When the Modify Medi-Cal Eligibility – Eligibility Month indication has been changed	Create a new Medi-Cal Eligibility record for the Month/Year the user indicated: <ul style="list-style-type: none"> Copy all populated fields other than the Eligibility Month (MM /YYYY) to the new record Set MM/YYYY to user indicated date Set the Last Updated Date to the current date Set the Type to Manual Update
97	16939	 CI-444534 - DSD BR CM 97 IMPLEMENTED	Modify Medi-Cal Eligibility	When the Modify Medi-Cal Eligibility screen is saved and the Eligibility Month has not been change, but another field has been changed	Save the updated information: <ul style="list-style-type: none"> Save all modified fields Set the Last Updated Date to the current date Set the Type to Manual Update
98	12264	 CI-445319 - DSD BR CM 98 IMPLEMENTED	Rescind Case "Cancel" link is selected	When the "Cancel" link is selected on the Rescind Case screen	Cancel the Rescind Case action and display the Case Home
99	12264	 CI-445320 - DSD BR CM 99 IMPLEMENTED	Rescind Case "Continue" link is selected	When the "Continue" link is selected on the Rescind Case screen and any of the following conditions are encountered: The MEDS Eligibility FFP indication has changed in the Authorization Period prior to termination Or a Cost of Living Adjustment was processed after the termination of a case with IHSS Share of Cost Evidence Or a Wage Rate was processed for the county to which the case is assigned in the Authorization Period prior to the termination Or a State Mandated Change was processed in the Authorization Period prior to the termination Or a Parent of a Minor Child or Spouse has a Terminated Provider Hours Segment with a Begin Date after the Authorization Start Date	Allow the Rescind Action <ul style="list-style-type: none"> Set the Authorization Start Date to the Authorization Start Date of the Authorization prior to the Terminate Case action Set the Authorization End Date to the last day of the calendar month prior to the following change: <ul style="list-style-type: none"> FFP Change Cost of Living Adjustment Begin Date Wage Rate Begin Date State Mandated Change Begin Date Or if Parent of a Minor Child or Spouse has been termination set the Authorization End Date to the last day of the month associated with the Termination Begin Date.

100	16940		Terminate Case	When the "Save" link is selected on the Terminate Case screen and the current status is Leave	<ul style="list-style-type: none"> • If Termination Reason selected is "Recipient Death" and the Authorization End Date prior to Leave is a date prior to the current date • Add an Assessment Type – Change • Set Program Evidence Authorization Start Date to one day after the Leave "From" date • Set the Program Evidence End Date to the last day of the month of the Terminate Case Authorization End Date • Process the Authorization • Authorization Decision = Ineligible • Suppress all NOA • Suppress all interfaces • Process Terminate Case Action • Set Termination Reason to Death • Set Termination Authorization End Date to the Terminate Case Authorization End Date • Process Authorization • Produce Applicable NOA • Trigger applicable interfaces • Else Termination Reason is other than Death and requires a 10-day notice and the Authorization End Date prior to Leave is a date prior to the current date • Add an Assessment Type – Change • Set Program Evidence Authorization Start Date to one day after the Leave "From" date • Set the Program Evidence End Date as follows: • If current date is more than 13 calendar days from the end of the current month, set Authorization End Date to last day of current month • Else current date is less than 13 calendar days from the end of the current month, set Authorization End Date to last day of next month • Process the Authorization • Authorization Decision = Ineligible • Suppress all NOA • Suppress all interfaces • Process Terminate Case Action • Set Termination Reason to Termination Case Reason • Set Termination Authorization End Date to current Terminate Case Authorization End Date • Process Authorization • Produce Applicable NOA • Trigger applicable interfaces
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (101-110)

No	Req ID	CI	Description	When	Action
101	16942 16959	↳ CI-451130 - DSD BR CM 101 IMPLEMENTED	Print barcode on forms generated by Vendor Print Center (500XINRN)	When a form is generated in the batch job Centralized Print Solution (500XINRN) per a CR submitted by CDSS.	A barcode, designating the number of pages printed per mailing Recipient is added to the Cover Page of all mailings from the Vendor Print Center when the Centralized Print Solution (500XINRN) batch job processes.
102	12264 12524	↳ CI-451620 - DSD BR CM 102 IMPLEMENTED	Rescind Terminated Case – State Hearing Filed before Termination effective	When the Save link is selected on the "Rescind Case" screen AND The Case Status was Terminated AND The Case Status prior to Termination was Eligible or Presumptive Eligible AND The Rescind Reason is "State Hearing Filed before Termination effective"	Set the Case Status to the Case Status prior to Termination. AND Set Authorization Start Date to Authorization Start Date prior to Termination. AND Set Authorization End Date to Authorization End Date prior to Termination. AND Trigger NOA SH05 and all other applicable NOAs.
103	16891 20733	↳ CI-468367 - DSD BR CM 103 IMPLEMENTED	Recipient Targeted Mailing	Form Mass Mailing Implementation.	Determine written language for mailing insert: <ul style="list-style-type: none">• If the Recipient's Written Language is Spanish, mailing insert should be Spanish Language.• Else, if the Recipient's Written Language is Chinese, mailing insert should be Chinese Language.• Else, if the Recipient's Written Language is Armenian, mailing insert should be Armenian Language.• Else, if Written Language is not Spanish, Chinese, or Armenian, mailing insert should be English Language.• For any Recipient with a Written Language other than English, Spanish, Chinese, or Armenian, also include GEN1365(MUL).
104	20734	↳ CI-480717 - DSD BR CM 104 IMPLEMENTED	Display Select Provider Name	When the Provider Name search icon is selected on the Create Recipient Workweek Agreement screen.	Display a list, by Provider name of all Providers currently associated with the Recipient case.
105	20734	↳ CI-480722 - DSD BR CM 105 IMPLEMENTED	Create Recipient Workweek Agreement or Modify Recipient Workweek Agreement	As the user enters or modifies time entries in any of the Hours or Minutes fields for the Weekly, or any daily hour on the Recipient Workweek Agreement.	Dynamically update the Total Hours field on the Create Recipient or Modify Recipient Workweek Agreements screens as data is keyed into any daily hours and/or minutes (Sunday through Saturday) fields.
106	20736	↳ CI-480718 - DSD BR CM 106 IMPLEMENTED	Nightly Batch - Determine Number of Active Providers – Case Home (500HINDN)	In the nightly batch determine the Number of Active Providers.	Determine the Number of Active Providers and populate to the Case Home - Number of Active Providers using the following criteria: Case Status is: <ul style="list-style-type: none">• Eligible• Or Presumptive Eligible• Or Leave And the Eligible field on any case Provider is: <ul style="list-style-type: none">• Yes or• No But a Provider Hours segment for the current day is Active.

107	20734	 CI-480723 - DSD BR CM 107 IMPLEMENTED	End Date Recipient Workweek Agreement when case status changes to Leave or Terminated	When the Case Status changes to Terminated or Leave AND There are Recipient Workweek Agreements with an End Date in the future.	Set the Recipient Workweek Agreement End Date as follows: <ul style="list-style-type: none">• If the case Authorization End Date is before the most recent Recipient Workweek Agreement Begin Date, set this future dated Workweek Agreement status to Inactive.• If the case Authorization End Date is a date before the End Date of an existing Recipient Workweek Agreement, set the Recipient Workweek Agreement End Date to the Authorization End Date.• Else, if the Authorization End Date is a date prior to the current date, set the Recipient Workweek Agreement End Date to the current date.
108	20735	 CI-480720 - DSD BR CM 108 IMPLEMENTED	End Date Provider Workweek Agreement when case status changes to Leave or Terminated	When the Case Status changes to Leave or Terminated AND An associated Provider has a Provider Workweek Agreement for this Recipient with an End Date in the future.	<ul style="list-style-type: none">• Set the associated Provider Workweek Agreement End Date as follows:• If the case Authorization End Date is before the most recent Provider Workweek Agreement Begin Date, set this future dated Workweek Agreement status to Inactive.• If the case Authorization End Date is a date before the End Date of an existing Provider Workweek Agreement, set the Provider Workweek Agreement End Date to the Authorization End Date.• Else, if the Authorization End Date is a date prior to the current date, set the Provider Workweek Agreement End Date to the current date.
109	20739	 CI-480731 - DSD BR CM 109 IMPLEMENTED	Calculate Case Monthly Overtime Maximum	When a case assessment is authorized AND the Auth to Purchase after Adjusted Hours either increases or decreases.	Calculate the Monthly Overtime Maximum as $((Case Weekly Maximum - 40) * 4)$ <ul style="list-style-type: none">• Negative values are set to zero.• Fractions of minute should be rounded up or down to the nearest minute.
110			This Business Rule was removed with CR 1132		

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (111-120)

No	Req ID	CI	Description	When	Action
111			This Business Rule was removed with CR 1132		
112			This Business Rule was removed with CR 1132		
113			This Business Rule was removed with CR 1132		
114			Removed		
115	20736 20737 20739 20740 20743 12072	 CI-480945 - DSD BR CM 115 IMPLEMENTED	Implement Overtime – State Mandated Change – One-Time Batch	This one-time batch job will be run to apply the following to the Recipient case at the implementation of overtime.	<p>Process with Overtime Implementation as follows:</p> <ul style="list-style-type: none"> If Pending Evidence exists, delete Pending Evidence. If the current Authorization End Date is prior to FLSA Start Date Create an Assessment Type – State Mandated Change Set Program Evidence Authorization Start Date to one day after previous Authorization End Date Set Program Evidence Authorization End Date to one day prior to FLSA Start Date and process Final Determination – Suppress NOA Create an Assessment Type – State Mandated Change Set Program Evidence Authorization Start Date FLSA Start Date Set Program Evidence Authorization End Date to last day of FLSA Start Date month and process Final Determination – Suppress NOA If the current Authorization End Date is on or after the one day prior to the FLSA Start Date Create an Assessment Type – State Mandated Change Set Program Evidence Authorization Start Date FLSA Start Date Set Program Evidence Authorization End Date to previous Authorization End Date and process Final Determination – Suppress NOA <p>After the assessment with the FLSA Start Date Authorization Start Date is processed, populate the following:</p> <ul style="list-style-type: none"> The Number of Active Providers to the Case Home Create and populate the FLSA Start Date Month (MM/YYYY) Monthly Overtime Maximums monthly record with the following case data: Monthly Authorized Hours (Authorization Summary: Total Auth to Purchase after Adjusted Hours) Weekly Authorized Hours (Authorization Summary: Weekly Authorized Hours: 31 Day Month) Weekly Maximum (Recipient Weekly Maximum) Monthly Overtime Maximum (Recipient Monthly Overtime Maximum) <p>Populate the following to the Provider Details screen:</p> <ul style="list-style-type: none"> Number of Active Cases Provider Weekly Maximum Provider Overtime Maximum
116	20734	 CI-480946 - DSD BR CM 116 IMPLEMENTED	End Date Recipient Workweek Agreement when new segment is created	When the Save link is selected on the Create Recipient Workweek Agreement screen is selected and the previous Recipient Workweek Agreement had an End Date as either: The System High Date 12/31/9999 Or a date future to the current Create Recipient Workweek Agreement Begin Date	Set the End Date on the previous Recipient Workweek Agreement to one day before the current Create Recipient Workweek Agreement Begin Date.
117	20804	 CI-484131 - DSD BR CM 117 IMPLEMENTED	Modify and Inactivate Form – Regenerate NOA – Audio CD or Data CD	When the Save Link on the Modify and Inactivate Form screen is selected And The Regenerate BVI NOA checkbox is selected And The BVI Notice of Action Option is Audio CD or Data CD	Regenerate and send standard PDF NOA to county printer Set Status on BVI format Cluster to Regenerated Regenerate manifest detail for interface CMDS876A AND IF the standard PDF NOA was generated in Spanish, Chinese, or Armenian Then generate the NOA as an unlocked Spanish, Chinese, or Armenian PDF with imbedded fonts for interface CMDS876A Else generate NOA as unlocked English PDF with imbedded fonts for interface CMDS876A
118			Removed with CR 1183		

119	20770	CI-486339 - DSD BR CM 119 IMPLEMENTED	Set Notice of Action Option – Create Blind or Visually Impaired	<p>When the Save link is selected on the Create Blind or Visually Impaired screen and the Notice of Action Option is:</p> <p>Braille Documents</p> <p>Or</p> <p>Audio CD</p> <p>Or</p> <p>Data CD</p>	<p>Set NOA Delivery to selected Notice of Action Option for generation and mailing of NOAs.</p> <p>And</p> <p>Maintain standard generation and mailing of PDF NOAs.</p>
120	20770	CI-486340 - DSD BR CM 120 IMPLEMENTED	Set Notice of Action Option – Create Blind or Visually Impaired	<p>When the Save link is selected on the Create Blind or Visually Impaired screen and the Notice of Action Option has been selected of:</p> <ul style="list-style-type: none"> • Large Font NOA 	Set NOA Delivery to selected Notice of Action Option for generation and mailing of NOAs.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (121-130)

No	Req ID	CI	Description	When	Action
121	20770	CI-486341 - DSD BR CM 121 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	<p>When the Save link is selected on the Modify Blind or Visually Impaired screen and the Notice of Action Option is:</p> <p>Braille Documents</p> <p>OR</p> <p>Audio CD</p> <p>OR</p> <p>Data CD</p>	<p>Set NOA Delivery to selected Notice of Action Option to generate and mail NOAs.</p> <p>AND</p> <p>Maintain standard generation and mailing of PDF NOAs.</p>
122	20770	CI-486342 - DSD BR CM 122 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen, and the Notice of Action Option has been selected as Large Font NOA.	Set NOA Delivery to selected Notice of Action Option for generation and mailing of NOAs.
123	20770	CI-486343 - DSD BR CM 123 IMPLEMENTED	BVI Recipient Targeted Mailing	<p>BVI Notification Mass Mailing Implementation.</p> <p>The mailing to the Recipient includes the following items:</p> <ul style="list-style-type: none"> Address sheet includes the Recipient's or Recipient Designee's Mailing address, and the return address of the County/District Office of the case at the time of mailing. BVI Functionality Introduction Letter GEN 1365 	<p>Flag and send to Vendor Print Center for printing and mailing Recipients identified by IHSS Aid Code [Blind SSI/SSP, or Blind IHSS] or Medi-Cal Aid Code [20, 24, 26, 27, 2E, 2H, or 6A] as blind, with a Case Status of one of the following:</p> <ul style="list-style-type: none"> Pending Eligible Presumptive Eligible <p>OR</p> <ul style="list-style-type: none"> Leave <p>Determine written language for mailing insert:</p> <ul style="list-style-type: none"> If the Recipient's Written Language is Spanish, mailing insert should be Spanish Language. Else, if the Recipient's Written Language is Chinese, mailing insert should be Chinese Language. Else, if the Recipient's Written Language is Armenian, mailing insert should be Armenian Language. Else, all other written languages print in English.

124		CI-486344 - DSD BR CM 124 CANCELLED	Cancelled by C R115 CGI M&O – PSR – EVV Simplification		
125	12264	CI-489622 - DSD BR CM 125 IMPLEMENTED	Rescind Case when there are associated Companion Cases	When the Rescind Case action processes AND <ul style="list-style-type: none">• The terminated case has associated Companion Cases AND <ul style="list-style-type: none">• The following error message is triggered: "All Companion Cases associated with this case must have either Pending Evidence or Active Evidence with an IHSS Determination Date within one business day of current date when any Companion Case Protective Supervision Proration = Yes. Please update case evidence as needed."	Change the Save link to a Continue link. AND Display the informational message "There are associated Protective Supervision Companion Cases. When Rescind action is processed you will need process an assessment against all cases in the Companion Case collection to ensure the Protective Supervision proration is correct on all cases."
126	12264	CI-489623 - DSD BR CM 126 IMPLEMENTED	Rescind Case when there are associated Companion Cases	When the Continue link is selected on the Rescind Case screen AND The following informational message has displayed: "There are associated Protective Supervision Companion Cases. When Rescind action is processed you will need update all cases in the Companion Case selection to ensure the Protective Supervision proration is correct on all cases."	Allow the rescind action on the terminated case.
127	20782	CI-489624 - DSD BR CM 127 IMPLEMENTED	Reactivate Case - Case Status Changes from Terminated to Pending	When the Save link is selected on the New Application (Reactive Case) screen AND The previous Status is Terminated AND The Referral Date indicated on the Reactivate Case Screen is equal to the Terminated From date.	Allow the action: <ul style="list-style-type: none">• Supersede Terminated Assessment, Authorization, and Modes of Service• Supersede the Terminated Status History record.• Set the Pending Status From date to the Referral Date indicated on the Reactivate Case screen.• Set the Case Status to Pending.
128	20782	CI-489625 - DSD BR CM 128 IMPLEMENTED	Reactivate Case - Case Status Changes from Application Withdrawn to Pending	When the Save link is selected on the Reactivate Case screen AND The previous Status is Application Withdrawn AND The Referral Date indicated on the Reactivate Case Screen is a date prior to the Application Withdrawn From date.	Allow the action: <ul style="list-style-type: none">• Supersede all Assessment Type Initial (Authorization End date of 12/31/9999), Authorization, and Modes of Service with an Authorization Start Date on or after the IHSS Referral Date.• Supersede the Application Withdrawn Status History record.• Set the current Case Status to Pending.• Set the Pending Status From date to the Referral Date indicated on the Reactivate Case screen.• Change the To date on the previous Status History record to one day before the Referral Date indicated on the Reactivate Case screen.
129	12264	CI-489626 - DSD BR CM 129 IMPLEMENTED	Rescind Denied Case – Status History Update	When the Save link is selected on the Rescind Case screen AND The case status is Denied.	Update Status History as follows: <ul style="list-style-type: none">• Supersede Denied Status History segment.• Set the Case Status to Pending.• Set the Pending Status To date to blank.
130	12264	CI-489627 - DSD BR CM 130 IMPLEMENTED	Rescind Terminated Case – Status History Update	When the Save link is selected on the Rescind Case screen AND The case status is Terminated.	Update Status History as follows: <ul style="list-style-type: none">• Supersede Terminated Status History segment.• Set the To date on the status prior to Terminated to blank.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (131-140)

No	Req ID	CI	Description	When	Action
131	20782	CI-489628 - DSD BR CM 131 IMPLEMENTED	New Application (Reactivate) Denied Case – Status History Update	When the Save link is selected on the Reactivate Case screen and previous case status was Denied	Update Status History as follows: <ul style="list-style-type: none">• Set Denied segment "To" date to one day prior to the Referral Date indicated on the Reactivate Case screen• Create Pending Status History segment setting "From" date equal to Referral Date indicated on the Reactivate Case screen
132	20782	CI-489629 - DSD BR CM 132 IMPLEMENTED	New Application (Reactivate) Terminated Case – Status History Update	When the Save link is selected on the Reactivate Case screen and the case status is Terminated	Update Status History as follows: <ul style="list-style-type: none">• Set Terminated segment "To" date to one day prior to the Referral Date indicated on the Reactivate Case screen• Create Pending Status History segment setting "From" date equal to Referral Date indicated on the Reactivate Case screen
133	12264	CI-489630 - DSD BR CM 133 IMPLEMENTED	Rescind Case	When the Save link is selected on the Rescind Case screen and the Active Evidence prior to Termination had one or more Assessments with an Authorization Start Date future to the Terminate Case Authorization End Date	Process Rescind case action: <ul style="list-style-type: none">• Set Authorization Start Date to Authorization Start Date prior to Termination• Set Authorization End Date to Authorization End Date prior to Termination• Populate TR18 NOA with the Funding Source associate with the assessment period that contained the termination• Reinstate the Assessments with the Authorization Start Date which was future to the termination date.
134	16940	CI-489631 - DSD BR CM 134 IMPLEMENTED	Terminate Leave Status Case	When the Save link is selected on the Terminate case screen the current case status is Leave and any of the following error messages are triggered: <ul style="list-style-type: none">• Authorization may not span Wage Rate MM/DD /YYYY• Authorization Period may not span FFP Change MM/DD/YYYY• Authorization Period may not span LMA MM/DD /YYYY• Authorization Period may not span CFCO Funding Source MM/DD/YYYY• Authorization Period may not span COLA MM/DD /YYYY• Authorization Period may not span State Mandated Change MM/DD/YYYY	Bypass the edit and allow Terminate Case action.
135	12007 16970	CI-489632 - DSD BR CM 135 IMPLEMENTED	Update Funding Source	When the Save link is selected on the Assign Case Provider or the Create Provider Hours screen <ul style="list-style-type: none">• And the Relationship to the Recipient is Parent of a Minor Child or Spouse• And the Begin Date is before a "Not Eligible" authorization segment on the Recipient case• And the current authorization Funding Source is PCSP	Allow the action and trigger the Funding Source Update for the first full calendar month after the "Not Eligible" authorization segment for which payment has not been made. **Period prior to "Not Eligible" period will not have Funding Source Update applied.

136	12007 16970	CI-489633 - DSD BR CM 136 IMPLEMENTED	Update Funding Source when Relationship to Recipient changes from Parent of Minor Child to Parent of an Adult Child	When the Save link is selected on the Modify Case Provider screen and the Relationship has changed from "Parent of a Minor Child" to "Parent of an Adult Child"	<p>If payments have been issued for any period after the Relationship Start Date, do not process Update Funding Source</p> <ul style="list-style-type: none"> Else, if current Funding Source is IHSS-R or CFCO, do not update Funding Source update. (Funding Source remains IHSS-R or CFCO) Else, if previous Funding Source is IPO5 and the case has either of the following, Restaurant Meals and/or a Provider with the Relationship to the Recipient of Spouse, no Update Funding Source action required (Funding Source remains IPO5) Else, if Funding Source is IPO5 and the case has only one of the following, Restaurant Meals or a Provider with the Relationship to the Recipient of Spouse, process Update Funding Source to change Funding Source from IPO5 to IPO2 or IPO4 Else, if Funding Source is IPO3 <p>If current case Authorization End Date is more than one day prior to the Provider Relationship Status Date, build missing period. Do not trigger NOA</p> <p>Else, create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.</p> <ul style="list-style-type: none"> Set Authorization Start Date equal to the Relationship Status Date Set the Authorization End Date to the Authorization End Date of the previous assessment, if that date is in a month future to the current month, in which the action is being taken <p>Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility)</p> <p>Process Final Determination producing applicable NOA (Changes Funding Source from IPO5 to IPO2).</p> <ul style="list-style-type: none"> Else, Funding Source is IPO3 process Update Funding Source to change Funding Sources to PCSP (Changes Funding Source from IPO3 to PCSP) Else, create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date. <ul style="list-style-type: none"> Set Authorization Start Date equal to the Relationship Status Date Set the Authorization End Date to the Authorization End Date of the previous assessment, if that date is in a month future to the current month, in which the action is being taken Otherwise, set the Authorization End Date to the last date of the Authorization Start Date month (one-month eligibility) Process Final Determination producing applicable NOA (Changes Funding Source from IPO3 to PCSP).
137	16215	CI-489634 - DSD BR CM 137 IMPLEMENTED	Update Funding Source	When the Save link is selected on the Assign Case Provider screen and the Relationship to the Recipient is "Parent of a Minor Child" And the Begin and End date are before the 1st day of the Recipients 18th birth month	<p>If payments have been issued for any period after the indicated End Date, do not process Update Funding Source</p> <ul style="list-style-type: none"> Else, if Funding Source on case is CFCO, IHSS-R, or IPO5 do not process Update Funding Source Else, if no payments have been issued on the case after the indicated End Date, and the Funding Source is PCSP, IPO2 or IPO4 process update Funding Source to change to IPO3 or IPO5 If current case Authorization End Date is more than one day prior to the 1st day of the Recipients birth month, Build missing period for the period from current case Authorization End Date to the last day of the month prior to the month in which the Recipient turns 18. Do not trigger NOA <p>Else, create an Assessment Type "Funding Source Update" – Cloning the previous assessment information except Authorization Start Date and Authorization End Date.</p> <ul style="list-style-type: none"> Set Authorization Start Date equal to the Provider Begin Date Set the Authorization End Date to the last date of the month prior to the month in which the Recipient turns 18. Process Final Determination producing applicable NOA (Changes Funding Source from PCPS, IPO2 or IPO4 to IPO3 or IPO5).
138	12103	CI-489635 - DSD BR CM 138 IMPLEMENTED	MEDS Daily Update	When a MEDS Daily Update record is received and Medi-Cal Share of Cost is indicated <ul style="list-style-type: none"> And the CIN on the MEDS Daily Update record received equals the most current CIN found in CMIPS And the current Medi-Cal Share of Cost is not equal the previous Medi-Cal Share of Cost And the Case Status is Pending, Eligible, Presumptive Eligible or Leave 	Trigger the "Change in Medi-Cal Share of Cost" task once regardless of the number of MEDS Eligibility records received

139	12264	 CI-489636 - DSD BR CM 139 IMPLEMENTED	Rescind Termination Reason Recipient Death (TR17)	When the Save link is selected on the "Rescind Case" screen and the CIN Search results in "No Active Medi-Cal"	<ul style="list-style-type: none"> • And the Case Status was Terminated • And the Termination Reason was Recipient Death (TR17) <ul style="list-style-type: none"> • Set the Case Status to status prior to Termination • Create MEDS Eligibility records to fill the gap between the last MEDS Eligibility record on the case and the current calendar month as follows: <ul style="list-style-type: none"> ◦ ELIGIBILITY MONTH – "Month/Year" for each missing month ◦ LAST UPDATED – Current Date ◦ RECORD TYPE = No MEDS Eligibility ◦ MEDI-CAL ELIGIBILITY STATUS = 909 ◦ FFP = N ◦ BIC ISSUE DATE – Same as BIC Issue Date on prior MEDS Eligibility Month record ◦ CIN = Same as CIN + Check Digit on prior MEDS Eligibility Month record ◦ MEDI-CAL DATE OF BIRTH – Same as Medi-Cal Date of Birth on prior MEDS Eligibility Month record ◦ MEDI-CAL COUNTY ID – Same as the Medi-Cal County ID on prior MEDS Eligibility Month record • All other data elements will default to blank • Do not trigger any SAWS or MEDS transactions
140	12623	 CI-489637 - DSD BR CM 140 IMPLEMENTED	Update Provider Paid Hours with updated WPCS hours	When the Save link is selected on the Modify WPCS Hours screen and the WPCS Hours have been modified (increase or decrease)	<ul style="list-style-type: none"> • Update the WPCS Hours on the Paid Hours screen for any affected service month • Update the WPCS Provider hours for all Active WPCS Provider

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (141-150)

No	Req ID	CI	Description	When	Action
141	20788	↳ CI-489854 - DSD BR CM 141 IMPLEMENTED	Rescind Case – Task to WPCS Work Queue	When the Save link is selected on the Rescind Case screen and WPCS Hours End Date is equal the Terminate Case Authorization End Date	Trigger Task "Recipient case Rescission" to the WPCS Work Queue.
142	20790	↳ CI-489855 - DSD BR CM 142 IMPLEMENTED	Trigger Task to WPCS Queue when Recipient MEDS Eligibility is terminated	When the MEDS Monthly Renewal processes and the MEDS Eligibility status in the current month is either begins or ends with a "9" and MEDS Eligibility status in the previous month did not begin or end with a "9" and the case has current WPCS Hours	Trigger a "Medi-Cal Eligibility Termination" Task to the WPCS Work Queue.
143	20789	↳ CI-489856 - DSD BR CM 143 IMPLEMENTED	Trigger Task to WPCS Work Queue when Medi-Cal Discontinuance (S3) is received from SAWS	When the SAWS Daily Receive is processed and an S3 transaction is received on an IHSS case which has current WPCS Hours	Trigger a "SAWS discontinuance" Task to the WPCS Work Queue
144	12301 20792	↳ CI-489857 - DSD BR CM 144 IMPLEMENTED	Terminate WPCS Hours when Funding Source changes to IHSS-R	When a MEDS Monthly Renewal file is processed and Funding Source is changed from PCSP, IPO or CFCO to IHSS-R because the Recipient Medi-Cal FFP changed from Y to N and the Recipient has current WPCS Hours	If the WPCS Hours segment has an End Date in the future or the system high date (12/31/9999) set the End Date to the last day of the month before the Funding Source changes to IHSS-R. Else, if WPCS Hours has a future dated Begin Date set the WPCS Hours to zero (0) and set the End Date to the system High Date (12/31/9999) <ul style="list-style-type: none">• Terminate any Active or Leave status WPCS Provider as follows:<ul style="list-style-type: none">◦ Set Provider Status to "Terminated"◦ Set Termination Effective Date equal to the Authorization Start Date of the IHSS-R Funding Source◦ Set Termination Reason to "Recipient Not Eligible for WPCS"
145	20791	↳ CI-489858 - DSD BR CM 145 IMPLEMENTED	Rescind Case – Task to Companion Cases	When the Save link is selected on the Rescind Case screen the case is part of a Companion Case Collection, trigger Task "Companion Case Rescission – Authorization Update Required" to all cases which were in Eligible or Presumptive Eligible status prior to the Rescind Action.	Trigger Task "Companion Case Rescission – Authorization Update Required" to all cases in the Companion Case collection which were previously in Eligible or Presumptive Eligible status.
146	20792	↳ CI-489859 - DSD BR CM 146 IMPLEMENTED	Funding Source Update – Task to Companion Cases	When an Update Funding source is processed against any case in a Companion Case Collection, trigger Task "Companion Case – Funding Source Update" to Case Owner to all cases in the Companion Case collection in Eligible or Presumptive Eligible status.	Trigger Task "Companion Case – Funding Source Update" to all cases in the Companion Case collection which are in Eligible or Presumptive Eligible status.
147	20774	↳ CI-489916 - DSD BR CM 147 IMPLEMENTED	Lock Recipient Passcode	When three failed authentication attempts were made using the Telephonic System AND The entered Case Number was identical in all three attempts	Generate Task to contact the Recipient and reset their Passcode to the Timesheet Eligibility Errors Work Queue AND Set Passcode for associated Case Number to 0000.
148			Removed with CR 1183		
149			Removed with CR 1183		

150	20809 20810	 CI-500956 - DSD BR CM 150 IMPLEMENTED	Update Status of Braille, Audio, and Textual NOA - Generated	When the case management batch job CMDS876A has completed successfully	Generate PDF files for all braille, audio and textual NOAs Pending Generation or Pending Regeneration AND Update the CONCERNROLECOMMUNICATION. status seen on the View Form and Modify and Inactivate Form screens from "Pending Generation" to "Generated" AND BVINOABRAILLETRIGGER. bviNOAStatus to Generated AND Update CONCERNROLECOMMUNICATION. statusDate to the date the batch job completed AND BVINOABRAILLETRIGGER. bviBrailleFileSendDate to the date the batch job completed AND For non-English NOA forms create a BVIATTACHMENT record
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (151-160)

No	Req ID	CI	Description	When	Action
151	20809 20811	CI-500957 - DSD BR CM 151 IMPLEMENTED	Update Status of Braille, Audio, and Textual NOA – Mailed	When the case management batch job CMDR876B is executed AND NOA Identifier match is found AND the NOA IDENTIFIER for a transaction has STATUS = M AND the transaction is processed without error	Update the BVINOABRAILLETRIGGER. bviNOAStatus to Mailed AND Update the CONCERNROLECOMMUNICATION. status field for the Braille NOA Form from "Generated" to "Mailed" – seen on Forms screens AND Update the BVINOABRAILLETRIGGER. bviBraileFileMailingDate status date provided in the processed transaction AND Update CONCERNROLECOMMUNICATION. statusDate with the status date provided in the processed transaction
152	20809 20812	CI-500958 - DSD BR CM 152 IMPLEMENTED	Track Braille, Audio and Textual NOA received information	When the case management batch job CMDR876B is executed AND a NOA IDENTIFIER has STATUS = R AND The transaction is processed without error	Update BVINOABRAILLETRIGGER. bviNOAStatus from Generated or Regenerated to Received (not visible on forms screens) AND Update BVINOABRAILLETRIGGER. bviBraileFileReceiveDate with status date provided in the processed transaction
153	20817 20827	CI-507527 - DSD BR CM 153 IMPLEMENTED	Modify and Inactivate Form – Suppress NOA	When the Modify and Inactivate Form screen is saved and the status is Pending and Suppress NOA is indicated	<ul style="list-style-type: none"> Send NOA through nightly batch to generate NOA PDF If triggered, send Recipient Notification 2271A (SOC 2271A) through batch to generate PDF Do not send NOA or Recipient Notification 2271A for printing Set Status of both NOA and SOC 2271A – Provider Notification 2271A to Suppressed If SOC 2271 – Provider Notification 2271 was triggered, set the Status to "Inactivated" <p>*Current functionality associated with SOC 2271 is to inactive see DSD Section 23 for SOC 2271 specific requirements and status setting.</p>
154	20817	CI-507526 - DSD BR CM 154 IMPLEMENTED	Modify and Inactivate Form – Suppress NOA	When the Modify and Inactivate Form screen is saved AND the BVI NOA cluster Status is Pending Generation with the Option of either Audio CD, Braille or Data CD AND Suppress NOA is indicated	<ul style="list-style-type: none"> Do not send standard PDF NOA to county printer Do not generate the NOA as an unlocked PDF with imbedded fonts for interface CMDS876A Do not generate manifest detail for interface CMDS876A Set Status on BVI format Cluster to Suppressed
155	20816	CI-507529 - DSD BR CM 155 IMPLEMENTED	Modify and Inactivate Form – Reprint in Another Language	When the Modify and Inactivate Form screen is saved AND the Reprint in Another Language cluster is indicated	Generate the NOA in selected language <ul style="list-style-type: none"> Set Status to Pending Reprint Set Status Date to current date Send NOA through nightly batch job (500MINDN to generate the NOA PDF Send NOA through nightly batch (500WINRN) to print the NOA Update the Status to 'Reprinted' Set Status Date to current date

156	20816	CI-507530 - DSD BR CM 156 IMPLEMENTED	Modify and Inactivate Form – Reprint in Another Language	When the Modify and Inactivate Form screen is saved AND the BVI Notice of Action Option is Audio CD or Data CD AND 'Regenerate' is selected in the BVI NOA cluster AND the Reprint in Another Language cluster is indicated	Generate the NOA in selected language <ul style="list-style-type: none">• Set Status to Pending Reprint• Set Status Date to current date• Send NOA through nightly batch (500MINDN) to generate the NOA PDF in Reprinted Language• Set Status to Reprinted• Set Status Date to current date• Generate manifest detail for interface CMDS876A• Set Status to Regenerated• Set Status Date to current date AND IF the standard PDF NOA was generated in Spanish, Chinese, or Armenian <ul style="list-style-type: none">• Then also generate the NOA as an unlocked Spanish, Chinese, or Armenian PDF with imbedded fonts for interface CMDS876A• Else also generate NOA as unlocked English PDF with imbedded fonts for interface CMDS876A
157	12455	CI-507532 - DSD BR CM 157 IMPLEMENTED	Modify and Inactivate Form – Update Form History	When the Modify and Inactivate Form screen is saved	<ul style="list-style-type: none">• Populate saved information to the Modify and Inactivate Form screen.• Save the previous View Forms data to the Forms History screen.
158	20816	CI-507528 - DSD BR CM 158 IMPLEMENTED	Modify and Inactivate Form – Reprint in Another Language – BVI NOA is Braille	When the Modify and Inactivate Form screen is saved AND the "Status" of the "Correspondence Details" is "Printed" AND the BVI Option is "Braille" AND "Reprint in Another Language" cluster is indicated	<ul style="list-style-type: none">• Regenerate NOA in selected language• Set Status to Pending Reprint• Set Status Date to current date• Do not regenerate the braille NOA• Send NOA through nightly batch (500MINDN) to generate the NOA PDF• Send NOA through nightly batch (500WINRN) to print the NOA• Set Status to Reprinted• Set Status Date to current date
159	20817	CI-507533 - DSD BR CM 159 IMPLEMENTED	Notify Supervisor of Suppressed NOA	When batch job (500MINDN) has completed and the resulting NOA has been suppressed	Trigger Notification "[case number] NOA Suppressed" to Case Owner Supervisor.
160	20816	CI-507531 - DSD BR CM 160 IMPLEMENTED	Modify and Inactivate Form screen – Reprint in Another Language cluster display	When the Edit link is selected from the Forms screen the Modify and Inactive Form screen displays	In the "Reprint in Another Language" cluster display the details associated with the most recent "Reprint in Another Language" request.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (161-170)

No	Req ID	CI	Description	When	Action
161	16361	CI-507534 - DSD BR CM 161 IMPLEMENTED	Rescind Case Action	When the Rescind Case action occurs AND An NOA is triggered	CMIPS shall print one (1) copy of the NOA for mailing to the Recipient.
162	16187	CI-507541 - DSD BR CM 162 IMPLEMENTED	Modify State Hearing Status	When the Modify State Hearing screen is saved AND An outcome of Erroneous Entry is indicated	<ul style="list-style-type: none"> Set the State Hearing status to Resolved. Set all fields to be non-editable.
163		CI-510887 - DSD BR CM 163 CANCELLED	Cancelled by CR 024		
164	20827	CI-510888 - DSD BR CM 164 IMPLEMENTED	Recipient Notification 2271A (SOC 2271A) – Rescind Case Action	When the Save link is selected on the Rescind Case screen AND The status changes from Terminated to Eligible or Presumptive Eligible	<p>Trigger the SOC2271A form in languages based upon the following:</p> <ul style="list-style-type: none"> If the recipient written language is English, trigger SOC2271A in the English language. Else if the recipient written language is Spanish, trigger SOC2271A in the Spanish language. Else if the recipient written language is Chinese, trigger SOC2271A in the Chinese language. Else if the recipient written language is Armenian, trigger SOC2271A in the Armenian language. Else the recipients written language is other than English, Spanish, Chinese, or Armenian, trigger SOC2271A in the English language, and include GEN1365(MUL). <p>Populate the following to the SOC 2271A form as follows:</p> <p>Addressee – Right justified, font size 9</p> <ul style="list-style-type: none"> Recipient Name Recipient Mailing Address Recipient Mailing City, State Zip <p>Note: If the recipient has a Guardian or Conservator, mailing should be addressed c/o that person.</p> <p>Case Information – Upper right section of form – All fields right justified, font size 12</p> <ul style="list-style-type: none"> Notification Date – Date Notice is printed. Recipient Name – Case Recipient Name. Recipient Case Number – CMIPS Case Number. Social Worker Name – Case Owner Name. Social Worker Number – Case Owner Worker Number. Social Worker Telephone – Case Owner Office Phone Number. Social Worker Office Address – County District Office Mailing Address. <p>Form Body – All fields are left justified in the space provided, font size 14</p> <ul style="list-style-type: none"> as of (date) – The Authorization Start Date of the most recent active evidence associated with the case status of Eligible or Presumptive Eligible. If the case has a future dated Leave or Terminated segment, do not trigger SOC 2271A. Monthly Authorized Hours are – Auth to Purchase after Adjusted Hours associated active evidence. Weekly Authorized Hours – Populate with the Weekly Authorized Hours (Authorization Summary: Weekly Authorized Hours). Save the Recipient Notification (SOC 2271A) as Correspondence for the recipient case in a Pending status, to be printed in the next batch cycle on the CMIPS printer associated with the user who rescinded the case.
165	20853 20862 20 863 20954 21123	CI-637062 - DSD BR CM 165 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 1 or 2 – County Review Violation Status – Active	When the Violation Count is 1 or 2 AND The County Review Outcome is Pending Review AND The current date is [FLSA Configuration: CountyReviewComplete] days* after the Violation Date *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the County Review Outcome from Pending Review to Upheld. Set the County Reviewer Name to superuser. Update the Violation Status from Pending Review to Active. Set County Review Letter Date to one business day after the batch date. Set the County Review Outcome Date to the batch date. Set the County Review Outcome Entered Date to the batch date. Close all associated Tasks. <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B.</p> <ul style="list-style-type: none"> To Provider, SOC 2257. If IHSS letter or DHCS with IHSS is indicated, also send SOC 2272. Else DHCS with WPCS indicates, also send DHCS 2272. To Recipient, SOC 2257A to all recipients associated with this provider in Active or On-Leave status.

166	20853	CI-637063 - DSD BR CM 166 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN - Violation 1 or 2 – Supervisor Review	When the Violation Count is 1 or 2 AND The Supervisor Review Outcome is Supervisor Review AND The current date is CountySupervisorReviewComplete business days* after the Task Creation Date (database field)	<ul style="list-style-type: none"> Set the Supervisor Review Outcome from Supervisor Review to Approved. Set the Supervisor Name to superuser. Update the Violation Status from Pending Review to Inactive. Set the Supervisor Review Outcome Date to the batch date. Set the Supervisor Review Outcome Entered Date to the batch date. Set Violation Count to blank, or decrement by one. Close all associated Tasks.
167	20853 20927	CI-637064 - DSD BR CM 167 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 1 or 2 – County Dispute Violation Status – Active	When the Violation Count is 1 or 2 AND The County Dispute Outcome is Pending Review AND The current date is CountyDisputeComplete days after the Dispute Filed Date	<ul style="list-style-type: none"> Set the County Dispute Outcome from Pending Review to Upheld. Select all three of the Upheld Dispute Upheld Outcome Reasons. Set County Dispute Letter Date to one business day after the batch date. Set the County Dispute User Name to superuser. Set the County Dispute Outcome Date to the batch date. Set the County Dispute Outcome Entered Date to the batch date. Violation Status remains Active. Do not update the Violation Status Date. Close all associated Tasks. <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B.</p> <ul style="list-style-type: none"> To Provider, either SOC 2280 or DHCS 2280 To Recipient, either SOC 2281 or DHCS 2281 to all recipients associated with this provider in Active or On-Leave status.
168	20853 20885 20886 20941 20942	CI-637065 - DSD BR CM 168 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 1 or 2 Supervisor Dispute Outcome Violation Status - Inactive	When the Violation Count is 1 or 2 AND The Supervisor Dispute Outcome is Supervisor Review AND The current date is CountyDisputeComplete business days* after the Dispute File Date *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the Supervisor Dispute Outcome from Supervisor Review to Approved. Set the Dispute Supervisor Name to superuser. Set the Supervisor Dispute Outcome Date to the batch date. Set Supervisor Dispute Outcome Entered Date to the batch date. Set County Review Letter Date to one business day after the batch date. Update the Violation Status from Active to Inactive. Update Violation Status Date to the batch date. Close all associated Tasks. Set Violation Count to blank (View Overtime Violation). Decrement Violation Count by 1 (Provider Details). <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B.</p> <ul style="list-style-type: none"> To Provider, either SOC 2263, or DHCS 2263. To Recipient, either SOC 2264, or DHCS 2264 to all recipients associated with this provider in Active or On-Leave status.
169	20858	CI-637066 - DSD BR CM 169 IMPLEMENTED	Overtime Violation County Dispute (Generate Dispute Task – 600JINDN) not completed in six (6) business days	When an Overtime Violation has County Dispute Outcome of Pending Review AND Six (6) business days have passed since the Dispute Entered Date	Trigger the task County Dispute Outcome due in four (4) business days [Provider Name] [Provider Number] to the following Work Queues: <ul style="list-style-type: none"> County Overtime Violation Supervisor Overtime Violation
170	20859	CI-637067 - DSD BR CM 170 IMPLEMENTED	Overtime Violation County Dispute (Generate Dispute Task – 600JINDN) not completed in eight (8) business days	When an Overtime Violation has County Dispute Outcome of Pending Review AND Eight (8) business days have passed since the Dispute Entered Date	Trigger the task County Dispute Outcome due in two (2) business days [Provider Name] [Provider Number] to the following Work Queues: <ul style="list-style-type: none"> County Overtime Violation Supervisor Overtime Violation

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (171-180)

No	Req ID	CI	Description	When	Action
171	20860	CI-637068 - DSD BR CM 171 IMPLEMENTED	Overtime Violation Supervisor Dispute (Generate Dispute Task – 600JNDN) not completed in eight (8) business days.	When an Overtime Violation has a Supervisor Dispute Outcome of "Supervisor Review" AND eight business days have passed since the "Dispute Entered Date"	Trigger the task "Supervisor Dispute Outcome due in two (2) business days [Provider Name] [Provider Number]" to the Supervisor Overtime Violation Work Queues.
172	20905	CI-675646 - DSD BR CM 172 IMPLEMENTED	Terminate Recipient Case – End Date Recipient Flexible Hours	When the Save link is selected on the Terminate Case screen AND the recipient has a Flexible Hours record AND the Frequency is "On-Going" AND the Flexible Hours status is Active Approved AND the Flexible Hours MONTH YYYY is future to the Terminate Case Authorization Start Date OR the Flexible Hours End Date is the system high date (12/31/9999)	<ul style="list-style-type: none"> IF the "Approved" Flexible Hours record which has a MONTH YYYY which is future to Terminate Case Authorization Start Date, deactivate the Flexible Hours record. ELSE the Flexible Hours End Date is 12/31/9999, set the "Flexible Hours End Date" to the last day of the calendar month associated with the Terminate Case Authorization Start Date (No Cancellation Letter will be triggered when the recipient case is terminated.)
173	20905 20906 20907	CI-675647 - DSD BR CM 173 IMPLEMENTED	Flexible Hours – One-Time – Approval	When the Save link is selected on the Create or Modify Flexible Hours screen AND the Frequency is One-Time AND the Request Outcome is "Approved"	Set the following: <ul style="list-style-type: none"> Set the Outcome Letter Date to one business day after the current date Set the Flexible Hours End Date to the last day of the MONTH YEAR being approved Set the Flexible Hours record status to "Active – Approved" IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer <ul style="list-style-type: none"> SOC 2266 to the Recipient SOC 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer <ul style="list-style-type: none"> DHCS 2266 to the Recipient DHCS 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
174	20905 20908 20909 20946 20947	CI-675648 - DSD BR CM 174 IMPLEMENTED	Flexible Hours - Denial	When the Save link is selected on the Create or Modify Flexible Hours screen AND the Frequency is One-Time OR the Frequency is On-Going AND the Request Outcome is any "Denied" reason	Set the following: <ul style="list-style-type: none"> Set the Outcome Letter Date to one business day after the current date Set Flexible Hours End Date to the last day of the MONTH YEAR requested Set the Flexible Hours record status to "Active – Denied" IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer <ul style="list-style-type: none"> SOC 2267 to the Recipient SOC 2267A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer <ul style="list-style-type: none"> DHCS 2267 to the Recipient DHCS 2267A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment

175	20905 20910 20911 20948 20949		Flexible Hours – On-Going – Approval	When the Save link is selected on the Create or Modify Flexible Hours screen AND the Frequency is On-Going AND the Request Outcome is "Approved"	Set the following: <ul style="list-style-type: none">• Set the Outcome Letter Date to one business day following the current date• Set the Flexible Hours End Date to the system high date (12/31/9999)• Set the Flexible Hours record status to "Active – Approved" IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer <ul style="list-style-type: none">• SOC 2268 to the Recipient• SOC 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment ELSE if the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer <ul style="list-style-type: none">• DHCS 2268 to the Recipient• DHCS 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
176	20905 20912 20913 20950 20951		User entered Flexible Hours End Date	When the Save link is selected on the Modify Flexible Hours screen AND the Frequency is On-Going AND the Flexible Hours End Date entered by the user is other than 12/31/9999	<ul style="list-style-type: none">• Set the Cancellation Letter Date to one business day following the current date• Flexible Hours record status remains "Active – Approved"• Retain the user indicated "Flexible Hours End Date" IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer <ul style="list-style-type: none">• SOC 2269 to the Recipient• SOC 2269A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment ELSE if the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer <ul style="list-style-type: none">• DHCS 2269 to the Recipient• DHCS 2269A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
177	20905		Recipient Flexible Hours Inactive - Yes	When the Yes link is selected on the Inactivate Recipient Flexible Hours screen	<ul style="list-style-type: none">• Set the Flexible Hours End Date to the current Date.• Set Flexible Hours record status to "Inactive"
178	20905		Recipient Flexible Hours History	When either of the following screens is successfully saved: <ul style="list-style-type: none">• Create Recipient Flexible Hours• Modify Recipient Flexible Hours	<ul style="list-style-type: none">• Allow the save action and push previous field indications except Comments to the Recipient Flexible Hours History screen• Set Last Updated Date to the current date• Set Last Updated by to the User ID of the user taking the action• Comments will be saved, but not tracked in the history.
179	20905 20948 20949		Create or Modify Flexible Hours	When the Save link is selected from the Create or Modify Flexible Hours screen AND the Frequency is On-Going AND the Outcome is Approved AND an On-Going Flexible Hours segment exists with an End Date after the current Flexible Hours MONTH YYYY	<ul style="list-style-type: none">• Allow the action• End Date the future dated On-Going Flexible Hours record with the last day of the month prior to the MONTH YYYY indicated on the current Flexible Hours screen. When Program Type is IHSS trigger the following to print at the user's local printer <ul style="list-style-type: none">• SOC 2268 to the Recipient• SOC 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment When Program Type is WPCS: <ul style="list-style-type: none">• DHCS 2268 to the Recipient• DHCS 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment

180	20905 20914 2 0915 20944 20945 20948 20949	 CI-675654 - DSD BR CM 180 IMPLEMENTED	Create or Modify Flexible Hours	<p>When the Save link is selected on the Create or Modify Flexible Hours screen</p> <p>AND a Flexible Hours segment exists with a MONTH and YYYY after the current MONTH YYYY request</p> <ul style="list-style-type: none"> • Allow the action • End Date the current record with the last date of the calendar month prior to the future dated Flexible Hours segment <p>IF the current Flexible Hours segment is for only a one month period</p> <ul style="list-style-type: none"> • AND the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer • SOC 2266 to the Recipient • SOC 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment • ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer • DHCS 2266 to the Recipient • DHCS 2266A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the current Flexible Hours segment is for multiple months</p> <ul style="list-style-type: none"> • IF the Flexible Hours Program Type is IHSS trigger the following to print at the user's local printer • SOC 2268 to the Recipient • SOC 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment <p>ELSE the Flexible Hours Program Type is WPCS trigger the following to print at the user's local printer</p> <ul style="list-style-type: none"> • DHCS 2268 to the Recipient • DHCS 2268A to all Providers associated with the recipient case with an "Active" or "Leave" Provider Hours segment
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (181-190)

No	Req ID	CI	Description	When	Action
181	20853 20881 20882 20925 20954	 CI-706131 - DSD BR CM 181 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 3 County Review Violation Status – Active	When the Violation Count is 3 AND the County Review Outcome is "Pending Review" AND the current date is "[FLSA Configuration: CountyReviewComplete]" days* after the "Violation Date" *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the County Review Outcome from "Pending Review" to "Upeld" Set the County Reviewer Name to "superuser" Update the Violation Status from "Pending Review" to "Active" Set County Review Letter Date to one business day after the batch date Set the County Review Outcome Date to the batch date Set the County Review Outcome Entered Date to the batch date Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider SOC 2257 <ul style="list-style-type: none"> If IHSS letter or DHCS with IHSS indicated also send SOC 2272 Else DHCS with WPCS indicates also send DHCS 2272 To Recipient SOC 2257A to all recipient's associated to this provider in "Active" or "On-Leave" status
182	20853 2 0883 20 884 20925 20954	 CI-706130 - DSD BR CM 182 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 4 County Review Violation Status – Active	When the Violation Count is 4 AND the County Review Outcome is "Pending Review" AND the current date is "[FLSA Configuration: CountyReviewComplete]" days* after the "Violation Date" *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the County Review Outcome from "Pending Review" to "Upeld" Set the County Reviewer Name to "superuser" Update the Violation Status from "Pending Review" to "Active" Set County Review Letter Date to one business day after the batch date Set the County Review Outcome Date to the batch date Set the County Review Outcome Entered Date to the batch date Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider SOC 2257 <ul style="list-style-type: none"> If IHSS letter or DHCS with IHSS indicated also send SOC 2272 Else DHCS with WPCS indicates also send DHCS 2272 To Recipient SOC 2257 to all recipient's associated to this provider in "Active" or "On-Leave" status

183	20853 20926 20955 20929 20930	CI-706128 - DSD BR CM 183 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 3 County Dispute Violation Status – Active	When the Violation Count is 3 AND the County Dispute Outcome is "Pending Review" AND the current date is "CountyDisputeComplete" days after the "Dispute Filed Date"	<ul style="list-style-type: none"> • Set the County Dispute Outcome from "Pending Review" to "Upheld" • Select all three of the Upheld Dispute Upheld Outcome Reasons • Set County Dispute Letter Date to one business day after the batch date • Set the County Dispute User Name to "superuser" • Set the County Dispute Outcome Date to the batch date • Set the County Dispute Outcome Entered Date to the batch date • Violation Status remains "Active" • Do not update the Violation Status Date • Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> • To Provider either SOC 2282 or DHCS 2282 • If IHSS letter or DHCS with IHSS indicated also send SOC 2273 • Else DHCS with WPCS indicates also send DHCS 2273 • To Recipient either SOC 2283 or DHCS 2283 to all recipient's associated to this provider in "Active" or "On-Leave" status
184	20853 20926 20955 20929 20930	CI-706129 - DSD BR CM 184 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 4 County Dispute Violation Status – Active	When the Violation Count is 4 AND the County Dispute Outcome is "Pending Review" AND the current date is "CountyDisputeComplete" days after the "Dispute Filed Date"	<ul style="list-style-type: none"> • Set the County Dispute Outcome from "Pending Review" to "Upheld" • Select all three of the Upheld Dispute Upheld Outcome Reasons • Set County Dispute Letter Date to one business day after the batch date • Set the County Dispute User Name to "superuser" • Set the County Dispute Outcome Date to the batch date • Set the County Dispute Outcome Entered Date to the batch date • Violation Status remains "Active" • Do not update the Violation Status Date • Close all associated Tasks <p>Letter Triggers:</p> <p>Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> • To Provider either SOC 2284 or DHCS 2284 • If IHSS letter or DHCS with IHSS indicated also send SOC 2273 • Else DHCS with WPCS indicates also send DHCS 2273 • To Recipient either SOC 2285 or DHCS 2285 to all recipient's associated to this provider in "Active" or "On-Leave" status

185	20853 20885 20886 20941 20942	CI-706127 - DSD BR CM 185 IMPLEMENTED	Scan Dead Line Tasks– 700JINDN Violation 3 or 4 Supervisor Dispute Outcome Violation Status - Inactive	When the Violation Count is 3 or 4 AND the Supervisor Dispute Outcome is "Supervisor Review" And the current date is "CountyDisputeComplete" business days* after the "Dispute File Date" *Business day count begins the day following the Violation Date.	<ul style="list-style-type: none"> Set the Supervisor Dispute Outcome from "Supervisor Review" to "Approved" Set the Dispute Supervisor Name to "superuser" Set the Supervisor Dispute Outcome Date to the batch date Set Supervisor Dispute Outcome Entered Date to the batch date Set County Review Letter Date to one business day after the batch date Update the Violation Status from "Active" to "Inactive" Update Violation Status Date to the batch date Close all associated Tasks Set Violation Count to blank (View Overtime Violation) Decrement Violation Count by 1 (Provider Details) <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> To Provider either SOC 2263 or DHCS 2263 To Recipient either SOC 2264 or DHCS 2264 to all recipient's associated to this provider in "Active" or "On-Leave" status
186	20743	CI-710771 - DSD BR CM 186 IMPLEMENTED	Calculate Case Weekly Authorized Hours	When a case assessment is authorized AND the Auth to Purchase after Adjusted Hours either increases or decreases *Increases would include a case status that changes from Pending to Eligible or Presumptive Eligible and hours are authorized (zero to something greater than zero).	Determine the case Weekly Authorized Hours: <ul style="list-style-type: none"> Divide IHSS Auth to Purchase after Adjusted Hours, for a full service month by 4.0 Fractions of minute should be rounded up to the next whole minute
187	16688 1 6691 16 692	CI-718138 - DSD BR CM 187 IMPLEMENTED	UHV Initial Home Visit – Unsuccessful Outcome	When a Create Unannounced Home Visit screen is saved (initial visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Follow-up UHV Attempt cluster on View Unannounced Home Visit Details screen.
188	16688 1 6691 16 692	CI-718139 - DSD BR CM 188 IMPLEMENTED	UHV Initial Home Visit – Unsuccessful Outcome	When a Modify Unannounced Home Visit screen is saved (initial visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Follow-up UHV Attempt cluster on View Unannounced Home Visit Details screen.
189	16688 1 6691 16 692	CI-718140 - DSD BR CM 189 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Letter Inactivate Link	When the Inactivate link is visible on the Follow-up UHV Attempt cluster for the Follow-up Letter And a Follow-up Home Visit Outcome is entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Letter
190	16688 1 6691 16 692	CI-718141 - DSD BR CM 190 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Letter Inactivate Link	When the View Unannounced Home Visit Details screen is displayed And the Follow-up Letter Date has been entered And the current date is one or more days after the Follow-up Letter Date has been entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Letter

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (191-200)

No	Req ID	CI	Description	When	Action
191	16688 16691 16692	CI-718142 - DSD BR CM 191 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Phone Call Inactivate Link	When the Inactivate link is visible on the Follow-up UHV Attempt cluster for the Follow-up Phone Call And a Follow-up Home Visit Outcome is entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Phone Call
192	16688 16691 16692	CI-718143 - DSD BR CM 192 IMPLEMENTED	UHV Follow-up Home Visit –Follow-up Phone Call Inactivate Link	When the View Unannounced Home Visit Details screen is displayed And the Follow-up Phone Call Date has been entered And the current date is one or more days after the Follow-up Phone Call Date has been entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Follow-up UHV Attempt cluster for the Follow-up Phone Call
193	16688 16691 16692	CI-718144 - DSD BR CM 193 IMPLEMENTED	UHV Follow-up Home Visit – Unsuccessful Outcome	When a Create Unannounced Home Visit screen is saved (Follow-up visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Final UHV Attempt cluster on View Unannounced Home Visit Details screen.
194	16688 16691 16692	CI-718145 - DSD BR CM 194 IMPLEMENTED	UHV Follow-up Home Visit – Unsuccessful Outcome	When a Modify Unannounced Home Visit screen is saved (Follow-up visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Display on the Final UHV Attempt cluster on View Unannounced Home Visit Details screen.
195	16688 16691 16692	CI-718146 - DSD BR CM 195 IMPLEMENTED	UHV Follow-up Home Visit – Outcome change	When a Modify Unannounced Home Visit screen is saved (Follow-up visit) And the Outcome is changed from 'Entry Denied', 'Uncooperative', 'Contact Made' or 'Not Available' And the new Outcome is 'Completed', 'Follow-up Required', 'Fraud Referral' or 'Reassessment Required' And the Final Phone Call Date has not been entered	Delete the Final UHV Attempt cluster and display the Unannounced Home Visit Details Screen.
196	16688 16691 16692	CI-718147 - DSD BR CM 196 IMPLEMENTED	UHV Final Home Visit – Final Phone Call Inactivate Link	When the Inactivate link is visible on the Final UHV Attempt cluster for the Final Phone Call And a Final Home Visit Outcome is entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Final UHV Attempt cluster for the Final Phone Call
197	16688 16691 16692	CI-718148 - DSD BR CM 197 IMPLEMENTED	UHV Final Home Visit – Final Phone Call Inactivate Link	When the View Unannounced Home Visit Details screen is displayed And a Final Visit Outcome has not been entered And the Final Phone Call Date has been entered And the current date is one or more days after the Final Phone Call Date has been entered	Display the View Unannounced Home Visit Details screen Do not display the Inactivate link on the Final UHV Attempt cluster for the Final Phone Call

198	16688 16691 16692	 CI-718149 - DSD BR CM 198 IMPLEMENTED	UHV Final Home Visit – Unsuccessful Outcome	When a Create Unannounced Home Visit screen is saved (Final visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Trigger Task “[case name] [case number]: Recipient is at risk for termination due to non-compliance with Unannounced Home Visit. Contact county QA staff.”
199	16688 16691 16692	 CI-718150 - DSD BR CM 199 IMPLEMENTED	UHV Final Home Visit – Unsuccessful Outcome	When a Modify Unannounced Home Visit screen is saved (Final visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Trigger Task “[case name] [case number]: Recipient is at risk for termination due to non-compliance with Unannounced Home Visit. Contact county QA staff.”
200	16688 16691 16692	 CI-718151 - DSD BR CM 200 IMPLEMENTED	Terminate Case for UHV non-compliance	When Terminate Case screen is saved and the reason is 'Non-Compliance - Unannounced Home Visit'	Terminate case Generate Termination notice with TR23

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (201-210)

No	Req ID	CI	Description	When	Action
201	20996 20997	CI-719089 - DSD BR CM 201 IMPLEMENTED	<p>Violation Count 3 or 4 State Review Outcome is Pending Override</p>	<p>When batch job 600RINDN runs AND the State Review Outcome is "Pending Override"</p>	<p>On the View Overtime Violation screen:</p> <ul style="list-style-type: none"> Update the State Review Outcome from "Pending Override" to "Override" Set the State Review User Name to the user taking the action Set the State Review Outcome Entered Date to the batch date Set the State Review Manager and State Review Outcome cluster fields to View Only Set the State Supervisor Review Outcome to "Supervisor Review"
202	20996 20997	CI-719090 - DSD BR CM 202 IMPLEMENTED	<p>Violation Count 3 or 4 State Supervisor Review Outcome is "Supervisor Review"</p>	<p>When batch job 600RINDN runs AND the Violation Count is 3 or 4 AND the current date is "[FLSA Configuration:StateReviewComplete]" days* after the "State Review Entered Date" AND the State Supervisor Review Outcome is "Supervisor Review"</p>	<p>On the View Overtime Violation screen:</p> <ul style="list-style-type: none"> Set the Violation Status Date to the batch date Update the Violation Status from "Active" to "Inactive" Update the State Supervisor Review Outcome from "Supervisor Review" to "Approved" Set the State Supervisor Review Outcome Entered Date to the batch date Set the State Supervisor Review Outcome Date to the batch date Set the State Supervisor Review Name to "superuser" Set the State Review Letter Date to one business day following the batch date Set all State Supervisor Review fields "View Only" <p>Letter Trigger Conditions:</p> <p>IF the Program Type associated to the Overtime Violation is IHSS and the provider serves only IHSS services, to all recipient(s) in "Eligible", "Presumptive Eligible" or "Leave" status</p> <ul style="list-style-type: none"> For Violation Count 3 or 4 Trigger SOC 2288 to IHSS Provider Trigger SOC 2289 to all recipient's associated to this provider in "Active" or "On-Leave" status. <p>ELSE IF, and the provider serves both IHSS and WPCS to a recipient and the Program Type of the violation is IHSS</p> <ul style="list-style-type: none"> If Violation Count is 3 or 4 Trigger DHCS 2288 to IHSS Provider with IHSS checked Trigger DHCS 2289, with IHSS checked, to all recipient's associated to this provider in "Active" or "On-Leave" status <p>ELSE, the provider serves only WPCS to a WPCS recipient and the Program Type of the violation is WPCS</p> <ul style="list-style-type: none"> Trigger DHCS 2288 to WPCS Provider with WPCS checked Trigger DHCS 2289, with WPCS checked, to all recipient's associated to this provider in "Active" or "On-Leave" status
203	20996 20997	CI-719091 - DSD BR CM 203 IMPLEMENTED	<p>Batch – 600RINDN Any Violation County</p> <p>CDSS Review Outcome – Pending Violation Status – Active</p>	<p>When batch job 600RINDN runs AND the Violation Count is any violation AND the current date is "[FLSA Configuration:CDSSReviewComplete]" days* after the "CDSS Review Entered Date" AND the CDSS Review Outcome is "Pending" *Business day count begins the day following the CDSS Review Filed Entered Date.</p>	<p>On the View Overtime Violation Screen:</p> <ul style="list-style-type: none"> Violation Status remains "Active" Retain the Status Date Retain the Next Possible Violation Date <p>On the View Overtime Violation – CDSS Review screen:</p> <ul style="list-style-type: none"> Set the CDSS Review Outcome from "Pending" to "Upheld" Set the CDSS Review Outcome Date to the batch date Override Reason remains blank Select "Upheld" check box to match CDSS Review indication (i.e. Unanticipated Need, Health and Safety Issue, or Immediate Need) Set the CDSS Reviewer Name to "superuser" Set the CDSS Review Outcome Entered Date to the batch date Set all CDSS Review fields, except CDSS Letter Date to "View Only"

204	20996 20997	 204 IMPLEMENTED	<p>Batch 600RINDN</p> <p>Any Violation Count</p> <p>CDSS Supervisor Review Outcome – Supervisor Review</p> <p>Violation Status – Inactive</p>	<p>When Batch Job 600RINDN processes</p> <p>AND the current date is “[FLSA Configuration:CDSSReviewComplete]” days after the “CDSS Review Entered Date”</p> <p>AND the CDSS Supervisor Review Outcome is “Supervisor Review”</p>	<ul style="list-style-type: none"> • On the View Overtime Violation screen: • Update the Violation Status from “Active” to “Inactive” • Set Violation Status Date to the batch date • Retain Next Possible Violation Date • Change the “Current Provider Violation Count” to blank • Decrement Violation Count by 1 until zero (Provider Details) • On the View Overtime Violation – CDSS Review screen: • Update the CDSS Supervisor Review Outcome from “Supervisor Review” to “Approved” • Set CDSS Supervisor Review Outcome Date to the batch date • Set CDSS Supervisor Review User Name to “superuser” • Set CDSS Supervisor Review Outcome Entered Date to batch date • Set CDSS Review Letter Date to one business day after the batch date • Set CDSS Review Letter Entered Date to the batch date • Set all CDSS Supervisor Review fields to “View Only” • Letter Triggers: <ul style="list-style-type: none"> • Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B • To Provider either SOC 2263 or DHCS 2263 • To Recipient either SOC 2264 or DHCS 2264 to all recipient's associated to this provider in “Active” or “On-Leave” status • Update Provider Eligibility • Regardless of the Violation Count: <ul style="list-style-type: none"> • IF provider is Terminated • AND the “Ineligible Reason” prior to termination was Tier 2 Conviction • OR Subsequent Tier 2 Conviction • Eligible field remains “No” • ELSE Termination Reason is • Third Overtime Violation • OR Fourth Overtime Violation • Update the Eligible field from “No” to “Yes” • Clear the Ineligible Reason • All other Enrollment settings remain as indicated prior to the ineligible action • On the Provider Details screen update the Ineligible Begin Date and Ineligible End Date to blank • Update Provider Ineligible Dates • On the View Overtime Violation record update the Ineligible Begin Date and Ineligible End Date to blank saving previous dates to history.
205	20996 20997	 205 IMPLEMENTED	<p>Batch 600RINDN</p> <p>Any Violation Count</p> <p>CDSS Supervisor Review Outcome – Pending Rejection</p> <p>Violation Status – Active</p>	<p>When Batch Job 600RINDN processes</p> <p>AND the CDSS Supervisor Review Outcome is “Pending Rejection”</p>	<p>One the View Overtime Violation Screen:</p> <ul style="list-style-type: none"> • Violation Status remains “Active” • Retain the Status Date • Retain the Next Possible Violation Date <p>On the View Overtime Violation – CDSS Review screen:</p> <ul style="list-style-type: none"> • Set the CDSS Supervisor Review Outcome from “Pending Rejection” to “Rejected” • Set the CDSS Supervisor Reviewer User Name to user taking action • Set the CDSS Supervisor Review Outcome Entered Date to the batch date • If CDSS Letter Date is blank, set all CDSS Supervisor Review fields, except CDSS Letter Date to “View Only” • Else, CDSS Letter Date is indicated set all CDSS Supervisor Review fields to “View Only”.
206	20996 20997	 206 IMPLEMENTED	<p>Batch 600RINDN</p> <p>Any Violation Count</p> <p>CDSS Review Outcome is “Pending Override”</p>	<p>When batch job 600RINDN runs</p> <p>AND the CDSS Review Outcome is “Pending Override”</p>	<p>On the View Overtime Violation – CDSS Review screen:</p> <ul style="list-style-type: none"> • Update the CDSS Review Outcome from “Pending Override” to “Override” • Set the CDSS Review User Name to the user taking the action • Set the CDSS Review Outcome Entered Date to the batch date • Set all the CDSS Review and CDSS Review Outcome cluster fields to View Only • Set the CDSS Supervisor Review Outcome to “Supervisor Review”

207	20996 20997	CI-719088 - DSD BR CM 207 IMPLEMENTED	<p>Batch 600RINDN Violation #3 or 4 State Supervisor Review Outcome – Pending Rejection Violation Status – Active</p> <p>When Batch Job 600RINDN processes AND the State Supervisor Review Outcome is "Pending Rejection"</p>	<p>On the View Overtime Violation Screen:</p> <ul style="list-style-type: none"> Violation Status remains "Active" Retain the Status Date <p>On the State Supervisor Review cluster:</p> <ul style="list-style-type: none"> Set the State Supervisor Review Outcome from "Pending Rejection" to "Rejected" Set the State Supervisor User Name to user taking action Set the State Supervisor Review Outcome Entered Date to the batch date Set all State Supervisor Review fields to "View Only" <p>Set Ineligible Dates</p> <ul style="list-style-type: none"> Set Ineligible Begin Date to current date plus "FLSAConfig:ProviderTermination" days (Field validation on both View Provider Details and current View Overtime Violation) Set Ineligible End Date as follows: <ul style="list-style-type: none"> IF Violation Count is 3 set the Ineligible End Date to the Ineligible Begin Date plus "FLSA:Config:ThirdViolation:IneligiblePeriod" days (Field validation on both View Provider Details and current View Overtime Violation) <ul style="list-style-type: none"> ELSE Violation Count is 4 set the Ineligible End Date to the Ineligible Begin Date plus "FLSA:Config:FourthViolation:IneligiblePeriod" days (Field validation on both View Provider Details and current View Overtime Violation) <p>Terminate Provider Hours as follows:</p> <ul style="list-style-type: none"> Create Leave/Terminate Provider Hours segment <ul style="list-style-type: none"> Set Provider Status to "Terminated" IF Violation Count is 3 set Termination Reason to "Third Overtime Violation" <ul style="list-style-type: none"> ELSE Violation Count is 4 set Termination Reason to "Fourth Overtime Violation" If the most recent Provider Hours segment has an End Date less than "FLSAConfig:ProviderTermination" calendar days from the current date <ul style="list-style-type: none"> Set the Termination Effective Date to the current End Date plus one day (+1) Else set the Termination Effective Date to current date plus "FLSAConfig:ProviderTermination" calendar days <p>Set Provider Eligible to "No" as follows:</p> <ul style="list-style-type: none"> Create Modify Enrollment with the following data: <ul style="list-style-type: none"> Set the Eligible field to "No". Set the Effective Date to "FLSAConfig:ProviderTermination" days from the current date. Set the Ineligible Reason as follows: <ul style="list-style-type: none"> IF Violation Count is 3 "Third Overtime Violation" <ul style="list-style-type: none"> ELSE Violation Count is 4 "Fourth Overtime Violation" <p>Set Next Possible Violation Date</p> <ul style="list-style-type: none"> IF the batch date is in the same calendar month as the Violation Date, set the Next Possible Violation Date to the first day of the next calendar month ELSE, if the batch date is in a subsequent calendar month, set the Next Possible Violation Date to the first day of the next pay period <p>Recipient CORI: Do not End the Recipient CORI record</p> <p>Trigger Task/Notifications as follows:</p> <ul style="list-style-type: none"> Notification to Case Owner "[Provider Name] Ineligible for [Provider Ineligible Reason]." Notification to Case Owner Supervisor "[Provider Name] Ineligible for [Provider Ineligible Reason]." Task to the Public Authority Work Queue "[Provider Name] Ineligible for [Provider Ineligible Reason]." If the Provider is a WPCS trigger task to WPCS Work Queue, trigger Task "[Provider Name] Ineligible for [Provider Ineligible Reason]." <p>Letter Triggers: Please see the IHSS/WPCS Letter Matrix found in DSD Section 31B</p> <ul style="list-style-type: none"> IF Violation Count is three (3), issue <ul style="list-style-type: none"> To Provider either SOC 2286 or DHCS 2286 To Recipient either SOC 2287 or DHCS 2287 to all recipient's associated to this provider in "Active" or "On-Leave" status ELSE Violation Count is four (4), issue <ul style="list-style-type: none"> To Provider either SOC 2290 or DHCS 2290 To Recipient either SOC 2291 or DHCS 2291 to all recipient's associated to this provider in "Active" or "On-Leave" status
208		CI-753370 - DSD BR CM 208 CANCELLED	Cancelled by ASR Sprint 11 Team 1&2	
209		CI-753369 - DSD BR CM 209 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification	
210		CI-753368 - DSD BR CM 210 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification	

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (211-220)

No	Req ID	CI	Description	When	Action
211		CI-753371 - DSD BR CM 211 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
212		CI-753372 - DSD BR CM 212 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
213		CI-753374 - DSD BR CM 213 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
214		CI-753375 - DSD BR CM 214 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
215		CI-753373 - DSD BR CM 215 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
216	21045	CI-753913 - DSD BR CM 216 IMPLEMENTED	Terminate Case – End Date Provider Overtime Violation Exemption	When the Save link is selected on the Termination Case screen AND the case is associated with an "Active" Overtime Violation Exemption with an End Date which extends beyond the Terminate Case Authorization End Date	Set flag for Batch Job 600TINDN) When nightly Batch Job (600TINDN) processes End Date* the Overtime Violation Exemption with the Terminate Case Authorization End Date AND for all records hide the "Edit" and "Inactivate" links *Bypass Error Message 413 (717,651)
217	16661 16 850	CI-753914 - DSD BR CM 217 IMPLEMENTED	Cost of Living Adjustment Processing – Social Security Percentage Increase and Benefit Level Increase/Decrease	Processes when a Cost of Living Adjustment is ordered to increase the clients Social Security Percentage and the Benefit Level is either increased or decreased.	Update CMIPS Wage Rate Table: Deductions Code Table with the increased Social Security Percentage and the Benefit Level table with the (increase or decrease amounts) only for CMIPS cases with: <ul style="list-style-type: none">• a Case Status of Eligible or Presumptive Eligible• and the IHSS Aid Code is 18, 28 or 68• And the Income Source is Retirement, Survivors, Disability Insurance (RSDI) – Recipient <p>Process with Cost of Living Adjustment as follows:</p> <ul style="list-style-type: none">• If Pending Evidence exists, delete Pending Evidence.• If the current Authorization End Date is prior to the [Benefit Level Effective Date]<ul style="list-style-type: none">◦ Create an Assessment Type – Cost of Living Adjustment<ul style="list-style-type: none">▪ Set Program Evidence Authorization Start Date to one day after previous Authorization End Date▪ Set Program Evidence Authorization End Date to one day before [Benefit Level Effective Date] and process Final Determination – Suppress NOA◦ Create an Assessment Type – Cost of Living Adjustment<ul style="list-style-type: none">▪ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date]▪ Set Program Evidence Authorization End Date to last day of calendar month associated with [Benefit Level Effective Date] and process Activate Evidence as follows:<ul style="list-style-type: none">• If previous IHSS SOC is less than current IHSS SOC trigger NOA SC03• If previous IHSS SOC is greater than current IHSS SOC produce NOA SC06• If previous IHSS SOC is equal to current IHSS SOC do not trigger any NOA• Case will be reported on SOC COLA EXCEPTION REPORT as RECIPIENT ELIGIBILITY EXTENDED FOR ONE MONTH• If the current Authorization End Date is on or after the [Benefit Level Effective Date]<ul style="list-style-type: none">◦ Create an Assessment Type – Cost of Living Adjustment<ul style="list-style-type: none">▪ Set Program Evidence Authorization Start Date = [Benefit Level Effective Date]▪ Set Program Evidence Authorization End Date to previous Authorization End Date and process Activate Evidence – Produce NOA as follows:<ul style="list-style-type: none">• If previous IHSS SOC is less than current IHSS SOC trigger NOA SC03• If previous IHSS SOC is greater than current IHSS SOC produce NOA SC06• If previous IHSS SOC is equal to current IHSS SOC do not trigger any NOA• If the Income Evidence indicates SOCIS002 report case on SOC COLA WARNING REPORT – VET ADMIN BENEFIT CODE 2

218		 CI-766266 - DSD BR CM 218 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
219		 CI-775177 - DSD BR CM 219 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
220		 CI-775178 - DSD BR CM 220 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (221-230)

No	Req ID	CI	Description	When	Action
221		CI-775179 - DSD BR CM 221 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
222		CI-775180 - DSD BR CM 222 CANCELLED	Cancelled by ASR Sprint 12 Team 1&2		
223	16878 21071 21072 21073	CI-775237 - DSD BR CM 223 IMPLEMENTED	Terminate Case Termination Health Care Certification – No Need (TR24)	When the Save link is selected on the Terminate Case screen AND The Health Care Certification Documentation Type field indication is "No Need" AND The Termination Reason is Health Care Certification – No Need	Allow the case termination Trigger NOA TR24 – Health Care Certification – No Need
224	16878 21071 21072 21073	CI-775238 - DSD BR CM 224 IMPLEMENTED	Rescind Case Retain all previously indicated Health Care Certification information	When the Save link is selected on the Rescind Case screen AND The Denial or Termination Reason was any of the following: <ul style="list-style-type: none">• DN22• DN23• TR22• TR24	Allow the Rescind action Retain all previous Health Care Certification field indications except Documentation Received Date and Documentation Type which are set to blank.
225	16878 21071 21072 21073	CI-775239 - DSD BR CM 225 IMPLEMENTED	Trigger "Health Care Certification Task"	When the current date is one business day before: The Health Care Certification "Due Date" OR If indicated, the "Health Care Certification Extension Due Date"	Trigger task, "[case name] [case number] Health Care Certification due."
226	16878 21071 21072 21073	CI-775240 - DSD BR CM 226 IMPLEMENTED	Trigger "Health Care Certification Task"	When the current date is ten calendar days before either the: Health Care Certification "Due Date" OR If indicated, the "Health Care Certification Extension Due Date"	Trigger task, "[case name] [case number] Health Care Certification due in 10 days."

227	21004	CI-795502 - DSD BR CM 227 IMPLEMENTED	Inactivate Recipient IHSS ESP Registration	When the county selects "Yes" on the Inactivate Recipient IHSS ESP Registration pop-up	<p>IF</p> <p>IHSS ESP registration record does exist under Recipient Case Number</p> <p>THEN</p> <p>Place message "recipientInactivation" on the message broker queue</p> <p>AND</p> <p>Create history snapshot for the ESP Registration record</p> <p>AND</p> <p>Create new Registration record with 'Inactive' status</p> <p>AND</p> <p>Create paper letter SOC 2321 to recipient, in recipient written threshold language, on county printer</p> <p>AND</p> <p>Make SOC 2321 pdf available on the Forms and Correspondence screen</p> <p>ELSE IF</p> <p>IHSS ESP registration record does not exist under Recipient Case Number</p> <p>THEN</p> <p>Create new Registration record with 'Inactive' status</p> <p>AND</p> <p>Create paper letter SOC 2321 to recipient, in recipient written threshold language, on county printer</p> <p>AND</p> <p>Make SOC 2321 pdf available on the Forms and Correspondence screen</p> <p>AND IF</p> <p>Recipient is not registered for TTS</p> <p>THEN</p> <p>For Providers of Recipient:</p> <p>IF</p> <p>CaseProviderEVVDetails.isETS = True</p> <p>THEN</p> <p>Update CaseProviderEVVDetails.isETS = False</p>
228	21161	CI-795503 - DSD BR CM 228 IMPLEMENTED	Reactivate Recipient IHSS ESP Registration	When the county selects "Yes" on the Reactivate Recipient IHSS ESP Registration pop-up	<p>IHSS ESP registration does not exist under Recipient Case Number</p> <p>Place message "recipientreactivation" on the message broker queue</p> <p>AND</p> <p>Create history snapshot for this Registration record</p> <p>AND</p> <p>Create new Registration record with 'Reactivated' status</p> <p>AND</p> <p>Delete records if any in UserFailedAttempts and UserLastLogin tables</p> <p>ELSE</p> <p>Create new Registration record with 'Reactivated' status</p>
229	16940 16941	CI-813518 - DSD BR CM 229 IMPLEMENTED	Terminate/On-Leave Recipient Case	<p>When the Recipient case is terminated or placed on-leave from the case home screen</p> <p>AND</p> <p>There is Pending Provider(s) assigned to the case</p>	Inactivate any pending provider case assignment records.

230	21256	 CI-819670 - DSD BR CM 230 IMPLEMENTED	<p>ICT Process Is Completed – End Date Recipient Waiver</p> <p>WHEN Inter-County Transfer evidence is approved</p> <p>AND</p> <p>The ICT status is updated to "Completed"</p> <p>AND</p> <p>There is a Recipient Waiver with a 12/31/9999 End Date</p>	<p>The Recipient Waiver End Date is set equal to the ICT Authorization Start date with a reason of 'Terminated Provider'</p>
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (231-240)

No	Req ID	CI	Description	When	Action
231	21130	CI-819029 - DSD BR CM 231 IMPLEMENTED	Generate new TTS Registration Code for Recipient	When the Reset Recipient TTS Code Pop-up screen is saved.	<p>The Reset Recipient TTS Code Pop-up screen closes.</p> <p>The Recipient's TTS Registration Code is updated in Case Management.</p> <p>EVVTS Recipient Registration Code Notification (CMIPS 0001) containing the generated registration code for the recipient will be generated on the county printer assigned to the person who triggered the action and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.</p>
232	21130	CI-819030 - DSD BR CM 232 IMPLEMENTED	Generate new TTS Registration Code for Provider	When the Reset Provider TTS Code Pop-up screen is saved.	<p>The Reset Provider TTS Code Pop-up screen closes.</p> <p>The Provider's TTS Registration Code is updated in Case Management.</p> <p>EVVTS Provider Registration Code Notification (CMIPS 0002) containing the generated registration code for the provider will be generated on the county printer assigned to the person who triggered the action and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.</p>
233	21133	CI-819045 - DSD BR CM 233 IMPLEMENTED	Modify Recipient Communication Preference	<p>The Modify Timesheet Communication Preferences Pop-up screen is saved</p> <p>AND</p> <p>The selected a communication preference is with a system in which the recipient is a registered user:</p> <ul style="list-style-type: none"> • Email for ESP • Telephone for TTS <p>OR</p> <p>The selected communication preference is blank and the recipient is not a registered user of either TTS or ESP</p>	<p>The Modify Timesheet Communication Preferences Pop-up screen closes.</p> <p>The recipient's communication preference is saved in Case Management as the new value if a new value was selected.</p>
234	21134	CI-819051 - DSD BR CM 234 IMPLEMENTED	Reset Recipient TTS Passcode	<p>The Reset Recipient TTS Passcode Pop-up screen is saved</p> <p>AND</p> <p>The New Passcode and Confirm Passcode fields contain 4-digit numbers</p> <p>AND</p> <p>The 4-digit numbers in both fields match one another.</p>	<p>Saves the input 4-digit Passcode to CM (if all edits passed)</p> <p>Closes the Reset Recipient TTS Passcode pop-screen and returns to the View Recipient Timesheet Preferences screen</p> <p>If the Passcode Status is currently Locked, then the Passcode Status is set to Unlocked.</p> <p>Update the Recipient Authorization Number if applicable.</p>
235	21134	CI-819060 - DSD BR CM 235 IMPLEMENTED	Reset Provider TTS Passcode	<p>The Reset Provider TTS Passcode Pop-up screen is saved</p> <p>AND</p> <p>The New Passcode and Confirm Passcode fields contain 4-digit numbers</p> <p>AND</p> <p>The 4-digit numbers in both fields match one another.</p>	<p>Saves the input 4-digit Passcode to the database (if all edits passed)</p> <p>Closes the Reset Provider TTS Passcode pop-screen and returns to the View Provider Timesheet Preferences screen</p> <p>If the Passcode Status is currently Locked, then the Passcode Status is set to Unlocked</p>

236	21130	CI-819056 - DSD BR CM 236 IMPLEMENTED	Generate new TTS Registration Code for Recipient by help desk user	When the Reset Recipient TTS Code Pop-up screen is saved by a help desk user	<p>The Reset Recipient TTS Code Pop-up screen closes.</p> <p>The recipient's TTS code is updated in CM to the new value.</p> <p>EVVTS Provider Registration Code Notification (CMIPS 0002) form is generated on the County Printer assigned to the Case Owner of the Recipient, and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.</p>
237	21130	CI-819057 - DSD BR CM 237 IMPLEMENTED	Generate new TTS Registration Code for Provider by help desk user	When the Reset Provider TTS Code Pop-up screen is saved by a help desk user	<p>The Reset Provider TTS Code Pop-up screen closes.</p> <p>The provider's TTS code is updated in CM to the new value.</p> <p>EVVTS Provider Registration Code Notification (CMIPS 0002) form is generated on the County Printer assigned to the Case Owner of the most recently added case relationship for the provider, and is printed either immediately or through overnight batch based on the selection in the "Print" drop down on the Reset Provider Registration Code pop-up.</p>
238		CI-822195 - DSD BR CM 238 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification		
239	21134 21214	CI-822184 - DSD BR CM 239 IMPLEMENTED	Register Recipient for TTS Pop-up Saved	<p>The Register Recipient for TTS Pop-up screen is saved</p> <p>AND</p> <p>The Passcode and Confirm Passcode fields contain 4-digit numbers</p> <p>AND</p> <p>The 4-digit numbers in both fields match one another.</p>	<p>The Recipient is registered with TTS using the input 4-digit Passcode as the Recipient's new passcode.</p> <p>Close the Register Recipient for TTS Pop-screen and return to the View Recipient Timesheet Preferences screen.</p> <p>If the Recipient had an EVV Exception, the EVV Exception indicator is removed (blanked out).</p> <p>IF the Recipient has an approved EVV Exception THEN Create a Case Note with the following information:</p> <p style="margin-left: 40px;">Case Note text = EVV Exception removed by recipient registration for TTS on <Current Date/Time>. Sensitivity = 1 Priority = Medium Status = Active Created by = <county user id></p>
240	12445 21063	CI-822198 - DSD BR CM 240 IMPLEMENTED	Generate – CMIPS 0003 - Recipient Confirmation of Changes or Enrollment in ESP or TTS	<p>When the Recipient Enrolls in ESP</p> <p>OR</p> <p>When the Recipient Enrolls in TTS</p> <p>OR</p> <p>The Recipient's Communication Preference changes</p> <p>OR</p> <p>The Recipient's TTS Passcode changes</p>	Generate TC3278 to the County printer in Nightly Batch.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (241-250)

No	R e q ID	CI	Description	When	Action
2 41	2 1 1 34	➡ CI-822288 - DSD BR CM 241 IMPLEMENTED	Register Provider for TTS Pop-up Saved	The Register Provider for TTS Pop-up screen is saved AND The Passcode and Confirm Passcode fields contain 4-digit numbers AND The 4-digit numbers in both fields match one another.	The Provider is registered with TTS using the input 4-digit Passcode as the Provider's new passcode. Close the Register Provider for TTS Pop-screen and return to the View Provider Timesheet Preferences screen.
2 42	2 0 7 70	➡ CI-822324 - DSD BR CM 242 IMPLEMENTED	Set Notice of Action Option – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen and the Notice of Action Option is: <ul style="list-style-type: none">• No Accommodation is Needed OR• County Support	Set Notice of Action Option Language to "BLANK"
2 43	2 0 7 70	➡ CI-822325 - DSD BR CM 243 IMPLEMENTED	Set IHSS Required Forms Option – Create Blind or Visually Impaired	When the Save link is selected on the Create Blind or Visually Impaired screen and the IHSS Required Forms Option is: <ul style="list-style-type: none">• No Accommodation is Needed OR• County Support	Set IHSS Required Forms Option Language to "BLANK"
2 44	1 2 4 45 2 0 7 70	➡ CI-822326 - DSD BR CM 244 IMPLEMENTED	Set Notice of Action Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen and the Notice of Action Option is: <ul style="list-style-type: none">• No Accommodation is Needed OR• County Support	Set Notice of Action Option Language to "BLANK"
2 45	1 2 4 45 2 0 7 70	➡ CI-822327 - DSD BR CM 245 IMPLEMENTED	Set IHSS Required Forms Option – Modify Blind or Visually Impaired	When the Save link is selected on the Modify Blind or Visually Impaired screen and the IHSS Required Forms Option is: <ul style="list-style-type: none">• No Accommodation is Needed OR• County Support	Set IHSS Required Options Form Language to "BLANK"
2 46	2 1 1 58 2 1 1 55	➡ CI-822387 - DSD BR CM 246 IMPLEMENTED	Rescind Terminated Case – EVV Evaluation	WHEN The Save link on the "Rescind Case with Client Index Number Search" screen is selected OR When the Save link is selected on the "Rescind Case without Client Index Number Search" screen is selected AND No errors are encountered	IF CaseEVVDetails table <u>DOES NOT</u> exist THEN Create CaseEVVDetails table AND Set CaseEVVDetails. TTSACCOMODATIONS to 'No Accommodation' AND Set CaseEVVDetails. EVVEffectiveDate to equal CountyEVVDate for the Case County.

2 47	2 1 1 58	 CI-822388 - DSD BR CM 247 IMPLEMENTED	Rescind Terminated Case – EVV Evaluation	WHEN The Save link on the "Rescind Case with Client Index Number Search" screen is selected OR When the Save link is selected on the "Rescind Case without Client Index Number Search" screen is selected AND No errors are encountered	IF CaseEVVDetails table DOES exist AND CaseEVVDetails. EVVEffectiveDate = 12/31/ /9999 (high end date) AND CountyEVVDate for the Case County IS NOT = 12/31/9999 THEN Set CaseEVVDetails. EVVEffectiveDate = CountyEVVDate for the Case County
2 48		 CI-822389 - DSD BR CM 248 CANCELLED	Cancelled by ASR Sprint 25 Team 1&2		
2 49	2 1 1 58	 CI-822390 - DSD BR CM 249 IMPLEMENTED	Recipient Timesheet Preferences screen – Inactivate ESP – Update Communication Preference	A County user Inactivates ESP Registration	IF Recipient is registered with TTS THEN Update Communication Preference to "Telephone" ELSE IF Recipient is not registered for TTS THEN Update Communication Preference to BLANK
2 50	2 0 7 74	 CI-822411 - DSD BR CM 250 IMPLEMENTED	Incorrect Recipient Phone Number Reported by TTS	WHEN The TTS interface CMOE999E sends a transaction (Stop Outbound Call to Incorrect Telephone Number Set) to Case Management to notify of incorrect Recipient phone number provided for outbound call campaign for timesheet review	THEN CMIPS trigger a task to the Case Owner "<Case Number> Case Recipient Phone Number needs to be updated"

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (251-260)

No	Req ID	CI	Description	When	Action
251	12264 12524	CI-822413 - DSD BR CM 251 IMPLEMENTED	Rescind Terminated Case – Recipient rescinds request for termination of services	When the Save link is selected on the "Rescind Case" screen AND The Case Status was Terminated AND The Case Status prior to Termination was Eligible or Presumptive Eligible AND The Rescind Reason is "Recipient rescinds request for termination of services"	Set the Case Status to the Case Status prior to Termination. AND Set Authorization Start Date to Authorization Start Date prior to Termination. AND Set Authorization End Date to Authorization End Date prior to Termination. AND Trigger NOA SH05 and all other applicable NOAs.
252	12264 12524	CI-822414 - DSD BR CM 252 IMPLEMENTED	Rescind Terminated Case – State Hearing Decision	When the Save link is selected on the "Rescind Case" screen AND The Case Status was Terminated AND The Case Status prior to Termination was Eligible or Presumptive Eligible AND The Rescind Reason is "State Hearing Decision"	Set the Case Status to the Case Status prior to Termination. AND Set Authorization Start Date to Authorization Start Date prior to Termination AND Set Authorization End Date to Authorization End Date prior to Termination AND Trigger NOA SH05 and all other applicable NOAs.
253		Reserved by CR107			
254	21175	CI-822501 - DSD BR CM 254 IMPLEMENTED	Upload Attachment associated to Case	User selects file for upload (following size and format limitations) AND Selects save button on the Upload Case Attachment Pop-Up.	IF The file name contains any characters other than 0 – 9, A – Z, a – z, ., - or _ (numbers 0 through 9, upper case A through Z, lower case a through z, dot, dash, or underscore), then substitute those characters with an underscore. THEN The file is stored and associated to the case. AND Any existing files that are marked for deletion for that day (given the form type is the same as form being uploaded - with the exception of SOC 426A, SOC 839, SOC 321, SOC 839A, SOC 838, and SOC 450) are no longer eligible to be restored AND The Case Attachment page displays with the most recently uploaded attachment listed first.
255	21175	CI-822502 - DSD BR CM 255 IMPLEMENTED	Archive Attachment associated to Case	User selects file for archiving	The document is moved to the Attachments History screen AND The document's status is immediately changed from Uploaded to Archived AND Is no longer triggered for deletion.
256	16050 21190	CI-822578 - DSD BR CM 256 IMPLEMENTED	MEDS Daily Receive (CMDR 103B) - Rescind a TR25 case termination from the past	IF a case was terminated for non-compliance with Medi-Cal (TR25) within the last 90 days AND MEDS Daily Receive interface (CMDR103B) transaction is received with Medi-Cal Eligibility (Medi-Cal Eligibility Status is not 000 or does not begin or end with a '9') for all of the month(s) after the SAWS termination date (including the current month) so that no gap in Medi-Cal eligibility exists in the received file.	Rescind the TR25 termination with rescind reason Medi-Cal Non-Compliance Resolved (R0005): Generate TR26 NOA Produce Notification to the Case Owner - [case name] [case number] Case Terminated due to SAWS discontinuance was rescinded on [rescind date]. Please review case to determine provider reinstatement and case needs. AND Previous hours and Authorization segment are reinstated AND Start and End date are reinstated to the dates prior to termination.

257	16050 12027 21190		MEDS Monthly Renewal (CMMR103D) - Rescind a TR25 case termination in the future	<p>IF a case is terminated for non-compliance with Medi-Cal (TR25) effective the first day of the next month</p> <p>AND</p> <p>The current month is eligible</p> <p>AND Medi-Cal sends eligibility (Medi-Cal Eligibility Status does not begin or end with a '9') for the future month on the MEDS Monthly Renewal file (CMMR103D)</p> <p>OR</p> <p>The current month is not eligible</p> <p>AND Medi-Cal sends eligibility (Medi-Cal Eligibility Status is not 000 or does not begin or end with a '9') for the current month on the MEDS Daily Receive file (CMDR103B) prior to MEDS Monthly Renewal (CMMR103D) that will run in the current month</p> <p>AND Medi-Cal sends eligibility for the future month on the MEDS Monthly Renewal File (CMMR103D) that is run in the current month</p>	<p>Rescind the TR25 termination with rescind reason Medi-Cal Non-Compliance Resolved (R0005):</p> <p>Generate TR26 NOA</p> <p>AND</p> <p>Produce Notification to the Case Owner - [case name] [case number] Case Terminated due to SAWS discontinuance was rescinded on [rescind date]. Please review case to determine provider reinstatement and case needs.</p> <p>AND</p> <p>Previous hours and Authorization segment are reinstated</p> <p>AND</p> <p>Start and End date are reinstated to the dates prior to termination.</p>
258		Reserved by CR170			
259	21228 21229 21212 21219		Confirm EVV Exception for Recipient	When the Yes button is selected on the Confirm EVV Exception for Recipient pop-up	<p>IF the Recipient is registered on ESP with an account that is not already inactivated</p> <p>THEN inactivation logic is executed to inactivate the Recipient's ESP registration (per existing Recipient ESP inactivate business rules)</p> <p>AND</p> <p>The inactivation comment, "Inactivation due to EVV Exception" is entered.</p> <p>ELSE IF the Recipient is already inactivated on the ESP</p> <p>THEN the Recipient's ESP registration remains inactivated.</p> <p>IF the Recipient is registered for TTS</p> <p>THEN the Recipient's TTS registration is inactivated by removing the registration date and pass code</p> <p>The Confirm EVV Exception for Recipient pop-up is closed</p> <p>AND</p> <p>The Recipient's EVV Exception Status is updated to Approved (EVES01)</p> <p>AND</p> <p>The EVV Exception Date Approved is update to the current date</p> <p>AND</p> <p>The EVV Exception button on the View Recipient Timesheet Preferences screen is no longer visible</p> <p>AND</p> <p>The Recipient's Communication Method is set to blank</p> <p>AND</p> <p>If the Recipient has a timesheet Accommodation of Press or Say then the Timesheet Accommodation is updated to No Accommodation.</p> <p>AND</p> <p>Form CMIPS 0004 will generate during batch (712LINDN) at the county printer.</p> <p>AND</p> <p>IF there are any outstanding timesheets in Pending Recipient Electronic Review status at the time a county enters an approved EVV Exception</p> <p>THEN</p> <p>IF</p> <p>The timesheet for the Provider with that Recipient isEVV = False</p> <p>THEN</p> <p>A copy of the EVV Exception Timesheet without EVV data elements (SOC 2261EXCEPT) will be printed immediately to the user's county printer. When printed, the EVV Exception Timesheet (SOC 2261EXCEPT) will contain a PDF-417 barcode containing appropriate data, the time entered for that pay period for that provider so that it can be sent to the TPF for imaging once it is signed.</p> <p>ELSE IF</p> <p>The timesheet for the Provider with that Recipient isEVV = True</p> <p>THEN</p> <p>A copy of the EVV Exception Timesheet with EVV data elements (SOC 2261EVV) will be printed immediately to the user's county printer. When printed, the EVV Exception Timesheet (SOC 2261EVV) will contain a PDF-417 barcode containing appropriate data, the time entered for that pay period and the EVV data element details for that provider so that it can be sent to the TPF for imaging once it is signed.</p> <p>AND</p>

				<p>The user will receive an informational message that the timesheet is printed</p> <p>AND</p> <p>The status of timesheets printed this way is updated to Pending Recipient Exception Review</p> <p>AND</p> <p>A case note entry is made on the Case Notes screen with the following information:</p> <p>Action: View/Edit (links are enabled)</p> <p>Entered by: SYSTEM</p> <p>Creation Date: <Current Date/Time></p> <p>Text: EVV Exception approved by <User Name and Worker Number> on <Current Date/Time></p> <p>AND</p> <p>Detailed case notes are made on the Case Note (details) screen with the following information:</p> <p>Priority: Medium</p> <p>Entered by: SYSTEM</p> <p>Status: Active</p> <p>Sensitivity: 1</p> <p>Creation Date: <Current Date/Time></p> <p>Subject: EVV Exception</p> <p>Notes History: <Full User Name> On <Current Date/Time> EVV Exception approved by <User Name and Worker Number> on <Current Date/Time>.</p> <p>AND</p> <p>IF The recipient is in a county with an EVV go live date THEN For each active provider assigned to the recipient who is registered on the ESP or TTS, set the EVV effective date to the later of the county EVV effective date or the beginning of the next pay period.</p> <p>ELSE IF The Recipient is not in an EVV live county or the Provider is not registered on the ESP or TTS THEN Do not set the EVV Effective Date</p> <p>ELSE IF The EVV Effective date for a Case Provider has already been updated to a date other than 12/31/9999 and the recipient is granted an exception THEN Do not update the EVV Effective Date</p>	
260	12264 12524	 CI-822693 - DSD BR CM 260 IMPLEMENTED	Manual Rescind Termination - Medi-Cal Restored	<p>When the Save link is selected on the Rescind Case screen</p> <p>AND</p> <p>The Case Status was Terminated</p> <p>AND</p> <p>The Case Status prior to Termination was Eligible or Presumptive Eligible</p> <p>AND</p> <p>The Rescind Reason is Medi-Cal Restored.</p>	<ul style="list-style-type: none"> Set the Case Status to the Case Status prior to Termination. Set Authorization Start Date to Authorization Start Date prior to Termination Set Authorization End Date to Authorization End Date prior to Termination Trigger NOA TR27.

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (261-270)

No	R e q ID	CI	Description	When	Action
2 61		Reserved by CR223			
2 62 1 2 1 49		 CI-822822 - DSD BR CM 262 IMPLEMENTED	SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS Applicant/Recipient – Matching SSN Identified in CMIPS	When an S2 transaction is received and the indicated IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is "Pending" take the following action:	<p>IF the Applicant SSN on the S2 does not match the SSN on the Person record associated with the IHSS Case Number</p> <p>AND</p> <p>If does match an Active (non-end dated) SSN Alternative ID value for another person in CMIPS</p> <p>THEN</p> <ul style="list-style-type: none"> • Produce Task to the Case Owner– SAWS provided SSN [S2 SSN Value] for [case name] [case number]. This SSN matches an SSN for another person in CMIPS. SAWS transaction was not processed. <p>AND</p> <p>Do not process the S2 transaction nor update CMIPS with details from this transaction</p>
2 63 1 2 1 49		 CI-822827 - DSD BR CM 263 IMPLEMENTED	SAWS Daily Receive (CMDR4XXA) S2 – Notification of CIN creation or update for IHSS Applicant/Recipient – Matching CIN Identified in CMIPS	When an S2 transaction is received and the indicated IHSS Case Number matches an existing CMIPS IHSS Case Number and the CMIPS Case Status is "Pending" take the following action:	<p>IF the Applicant CIN on the S2 does not match the CIN on the Person record associated with the IHSS Case Number</p> <p>AND</p> <p>If does match an Active (non-end dated) CIN Alternative ID value for another person in CMIPS</p> <p>THEN</p> <ul style="list-style-type: none"> • Produce Task to the Case Owner– SAWS provided CIN [S2 CIN Value] for [case name] [case number]. This CIN matches a CIN for another person in CMIPS. SAWS transaction was not processed. <p>AND</p> <p>Do not process the S2 transaction nor update CMIPS with details from this transaction</p>
2 64 1 2 2 76		 CI-822918 - DSD BR CM 264 IMPLEMENTED	Monthly Batch Job to Delete Attachment IDs from Cloudian (500AINWN)	<p>When batch job 500AINWN is executed</p> <p>AND</p> <p>Recipient form Attachment IDs created during the previous month are identified</p>	<p>IF Attachment ID is found in Cloudian</p> <p>THEN</p> <p>Delete the Attachment blob from Cloudian</p> <p>AND</p> <p>Run the purge script to delete the records from Attachment details table from Curam</p>
2 65 2 0 9 05		 CI-822941 - DSD BR CM 265 IMPLEMENTED	View Recipient Flexible Hours History	When the View link is selected on the Recipient Flexible Hours History pop-up	Display the View Recipient Flexible Hours History pop-up

2	1	CI-823019 - DSD BR	MEDS Daily Receive (CMDR103B) – Processing to Set SOC 2271 Trigger	When MEDS Daily Receive (CMDR103B) is processed in CM AND A transaction, where eligibility status does not start or end with a '9', is processed for the current calendar month for a Recipient in Eligible or Presumptive Eligible status	IF the CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that does not begin or end with a '9' AND The transaction Medi-Cal Aid Code is different than the Recipient's Medi-Cal Aid Code for the current calendar month AND The transaction with this new Medi-Cal Aid Code has a zero SOC (Share of Cost) for the current calendar month AND The SOC (Share of Cost) for the current calendar month with the prior Medi-Cal Aid Code is greater than zero THEN Set trigger for SOC 2271 with SOC (Share of Cost) marked as No ELSE IF The CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that begins or ends with a '9' AND IF the transaction has a zero SOC (Share of Cost) for the current calendar month THEN Set trigger for SOC 2271 with SOC (Share of Cost) marked as No ELSE IF the transaction has a SOC (Share of Cost) greater than zero for the current calendar month THEN Set trigger for SOC 2271 with SOC (Share of Cost) marked as Yes
66	6	0	50		

2 67	1 2 0 27	CI-823020 - DSD BR CM 267 IMPLEMENTED	MEDS Monthly Renewal Receive (CMMR103D) – Processing to Set SOC 2271 Trigger	<p>When MEDS Monthly Renewal Receive (CMMR103D) is processed in CM</p> <p>AND</p> <p>A transaction is processed for a Recipient in Eligible or Presumptive Eligible status</p> <p>IF the CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that does not begin or end with a '9'</p> <p>AND</p> <p>IF the transaction has a zero SOC (Share of Cost) for the future month</p> <p>AND</p> <p>The SOC (Share of Cost) for the current calendar month is greater than zero</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as No</p> <p>ELSE IF the transaction has a SOC (Share of Cost) greater than zero for the future month</p> <p>AND</p> <p>The SOC (Share of Cost) for the current calendar month is zero</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as Yes</p> <p>ELSE IF the CMIPS Medi-Cal eligibility record for the current calendar month has an eligibility status that begins or ends with a '9'</p> <p>AND</p> <p>IF the transaction has a zero SOC (Share of Cost) for the future month</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as No</p> <p>ELSE IF the transaction has a SOC (Share of Cost) greater than zero for the future month</p> <p>THEN</p> <p>Set trigger for SOC 2271 with SOC (Share of Cost) marked as Yes</p>
2 68	2 1 3 20	CI-823134 - DSD BR CM 268 IMPLEMENTED	Modify Notification Communication Preference	When the Edit button is selected for Notification Communication Preference on View Recipient Timesheet Preferences Screen
2 69	2 1 3 20	CI-823135 - DSD BR CM 269 IMPLEMENTED	Verify Cell Phone Number	When the Verify Cell Phone is selected for Notification Communication Preference on View Recipient Timesheet Preferences Screen
2 70	2 1 1 75	CI-823243 - DSD BR CM 270 IMPLEMENTED	Restore Attachment associated to Case	User selects Restore action on the Attachments History page for a file

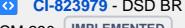
DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (271-280)

No	R e q ID	CI	Description	When	Action
2 71	2 1 1 86 2 1 1 75	➡ CI-823633 - DSD BR CM 271 IMPLEMENTED	Upload Attachment associated to Case	User selects Save on the 'Upload a File' pop-up AND The form selected already exists on the Attachment screen AND The form status is 'Failed Scan'	THEN Place the new document in 'Pending Scan' status AND Update the status of the existing record from 'Failed Scan' to 'Archived Failed Scan' causing the record to be displayed on the 'Attachments History' screen.
2 72	2 1 1 86 2 1 1 75	➡ CI-823635 - DSD BR CM 272 IMPLEMENTED	Restore Attachment associated to Case	User selects the 'Restore' action for a document AND There is not a document of that type in the 'Uploaded' status	THEN Change the document status from 'Archived' to 'Uploaded'
2 73	2 1 1 86 2 1 1 75	➡ CI-823636 - DSD BR CM 273 IMPLEMENTED	Restore Attachment associated to Case (Multiple Copies)	User selects the 'Restore' action for a document AND There is already a document of that type in 'Uploaded' status AND The document allows multiple copies (CR 6181, SOC 321, SOC 426A, SOC 838, SOC 839, SOC 839A, or SOC 450)	THEN Change the document status from 'Archived' to 'Uploaded'
2 74	2 1 1 86 2 1 1 75	➡ CI-823637 - DSD BR CM 274 IMPLEMENTED	Delete Attachment associated to Case	User selects the 'Delete' action for a document	The document status is immediately changed to 'Pending Delete' AND Triggers its deletion in the overnight batch.
2 75	2 1 1 86 2 1 1 75	➡ CI-823638 - DSD BR CM 275 IMPLEMENTED	Undelete Attachment associated to Case	User selects the 'Undelete' action for a document	The document status is immediately changed to 'Archived' AND Removes the deletion trigger.
2 76	2 1 3 78	➡ CI-823715 - DSD BR CM 276 IMPLEMENTED	Electronic Forms - Display list of pending electronic forms for Recipient	User clicks on the Electronic Forms tab	Display the list of electronic forms that are in (Pending, Sent, Ready for Review, Accepted, Rejected) on the Electronic Forms table with their associated action links.
2 77	2 1 3 78	➡ CI-823761 - DSD BR CM 277 IMPLEMENTED	Completed Electronic Forms - Display completed form	User clicks on the Completed Electronic Forms tab from the Case Attachment screen	Display the Completed Electronic Forms screen AND IF Form Status = Accepted THEN List the completed electronic form on the electronic forms table with its associated action links (View and History)

2 78	2 1 3 78	 CI-823777 - DSD BR CM 278 IMPLEMENTED	Electronic Forms - Create new form	User selects the New button on the Electronic Forms screen	<p>Display the Create Electronic Form Pop-Up AND WHEN User selects the Save button AND One or more forms are selected THEN</p> <p>Create the selected forms in the selected language in AWS and CM. AND IF a selected form is not available in the selected language THEN create the form in English.</p> <p>AND</p> <p>Adds the new form(s) to the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action - displays Edit..., Send to CSP..., Send to ESP..., and History... links • Form Name - name of the new form(s) • Sent to - blank • Status - Pending <p>AND</p> <p>Creates History snapshot record</p>
2 79	2 1 3 78	 CI-823779 - DSD BR CM 279 IMPLEMENTED	Electronic Forms - Send to CSP hyperlink	User selects the Send to CSP hyperlink on the Electronic Forms screen	<p>Display the Send Electronic Form to CSP Pop-Up AND IF The Send button is selected THEN</p> <p>Sends the Electronic Form to the Assigned Worker's CSP 'inbox'</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action - updated to remove Edit..., Send to CSP..., and Send to ESP... action links, adds Resend to CSP... and Resend to ESP... action links (History... link remains) • Sent to - updated from blank to display the Assigned Worker's name • Status - updated from Pending status to Sent <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: Allow form submission (AEM Internal Status)</p>
2 80	2 1 3 78	 CI-823781 - DSD BR CM 280 IMPLEMENTED	Electronic Forms - Accept hyperlink	User selects the Accept hyperlink on the Electronic Forms screen	<p>Display the Accept Electronic Form Pop-Up AND IF The Yes button is selected THEN</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action - updated to remove Accept... and Reject... action links (View... and History... links remain) • Status - updated from Ready For Review to Accepted <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: AEM Internal Status</p>

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (281-290)

No	R e q ID	CI	Description	When	Action
2 81	2 1 3 78	CI-823815 - DSD BR CM 281 IMPLEMENTED	Electronic Forms - Resend to CSP hyperlink	User selects the Resend to CSP hyperlink on the Electronic Forms screen	<p>Display the Send Electronic Form to CSP Pop-Up AND IF The Send button is selected THEN Sends the Electronic Form to the Assigned Worker's CSP 'inbox'</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action - updated to display only the Resend to CSP..., Resend to ESP..., and History... action links • Sent to - updated to display the Assigned Worker's name • Status - updated to Resent status <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: Allow form submission (AEM Internal Status)</p>
2 82	2 1 3 78	CI-823816 - DSD BR CM 282 IMPLEMENTED	Reject Electronic Form- Edit & Resend	User selects the Reject... hyperlink on the Electronic Form screen	<p>Displays the Reject Electronic Form Pop-Up AND IF The Edit & Resend button is selected THEN</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action - updated to remove Accept... and Reject... action links, adds Edit..., Send to CSP..., and Send to ESP... links (View..., History... action links remain) • Sent to - updated to blank • Status - updated from Ready For Review to Pending <p>AND</p> <p>Creates History snapshot record</p> <p>AND</p> <p>Update AEM via webservice: Allow form to be editable but not submitted (AEM Internal Status)</p>
2 83	1 2 2 60 1 2 5 27 1 2 5 30 1 2 8 28	CI-823846 - DSD BR CM 283 IMPLEMENTED	Terminate Case - Enrolled in PACE program	User selects the Save button on the Terminate Case screen Reason=Enrolled in PACE program	Update case status to terminated AND Trigger TR28 NOA - Terminated - Enrolled in PACE program
2 84	2 1 3 78	CI-823850 - DSD BR CM 284 IMPLEMENTED	Electronic Forms - View action	User selects the View action link on the Electronic Forms table	Display the form with the current state of edits in a non editable PDF.
2 85	2 1 3 78	CI-823886 - DSD BR CM 285 IMPLEMENTED	Accept Electronic Form 426A - County Worker Electronic Signature	WHEN a county worker clicks the Yes button on the Accept Electronic Form pop-up for electronic 426A	THEN save, "Worker Name, Worker Number (Electronic)" in the WORKER NAME: field AND save the date <MM/DD/YYYY> the form was accepted in the DATE: field
2 86		CI-823896 - DSD BR CM 286 CANCELLED	Cancelled via ASR Sprint 57 Team CM&AS		
2 87		CI-823897 - DSD BR CM 287 CANCELLED	Cancelled via ASR Sprint 57 Team CM&AS		

2 88	2 1 3 78	 CI-823910 - DSD BR CM 288 IMPLEMENTED	Electronic Forms - Submit Action	When a user submits an electronic form in CSP or ESP	<p>The electronic form is passed between AEM CSP or AEM ESP and Case Management</p> <p>Case Management updates the Electronic Forms table for the corresponding form:</p> <ul style="list-style-type: none"> • Action - updated to remove Resend to CSP... and Resend to ESP... action links, adds View..., Accept..., Reject... action links (History... link remains) • Status - updated to Ready for Review <p>AND</p> <p>Creates History Snapshot record</p> <p>AND</p> <p>Update AEM via webservice: (AEM Internal Status)</p>
2 89	2 0 7 65 2 0 7 96 2 1 1 53	 CI-823933 - DSD BR CM 289 IMPLEMENTED	Modify Recipient Timesheet Accommodation	<p>The Modify Recipient Timesheet Accommodation Pop-up is saved</p> <p>AND</p> <p>The timesheet accommodation option selected is one of the three options:</p> <ul style="list-style-type: none"> • No Accommodation • *Press or Say • Large Font Timesheet <p>AND</p> <p>The Recipient is not designated to receive Advance Pay</p> <p>AND</p> <p>The Recipient who is registered for TTS has Spoken Language English or Spanish.</p> <p>*Recipient must be registered for TTS for this option to be selected.</p>	<p>The Modify Recipient Timesheet Accommodation Pop-up closes.</p> <p>The Recipient's Timesheet Accommodation is saved in Case Management.</p>
2 90	2 1 3 78	 CI-823979 - DSD BR CM 290 IMPLEMENTED	Electronic Forms - Send to ESP hyperlink	User selects the Send to ESP hyperlink on the Electronic Forms screen	<p>Display the Send Electronic Form to ESP Pop-Up AND WHEN The Send button is selected THEN</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> • Action: removes Edit..., Send to CSP, Send to ESP action links, adds Resend to CSP and Resend to ESP action links, (View and History links remain) • Status: Sent • Sent to: Recipient <p>AND</p> <p>Creates History snapshot record</p>

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (291-300)

No	R e q ID	CI	Description	When	Action
2 91	2 1 3 78	➡ CI-823980 - DSD BR CM 291 IMPLEMENTED	Electronic Forms - Resend to ESP hyperlink	User selects the Resend to ESP hyperlink on the Electronic Forms screen	Display the Send Electronic Form to ESP Pop-Up AND WHEN The Send button is selected THEN Updates the Electronic Forms table: <ul style="list-style-type: none">• Action: removes Edit..., Send to CSP, Send to ESP action links, adds Resend to CSP and Resend to ESP action links, (View and History links remain)• Status: Resent• Sent to: Recipient AND Creates History snapshot record
2 92	2 1 3 78	➡ CI-823985 - DSD BR CM 292 IMPLEMENTED	Accept Electronic Form SOC 838 - Save County Worker Electronic Signature	A county worker selects the Yes button on the Accept Electronic Form Pop-Up for electronic SOC 838	Save, "Worker Name (Electronic)" in the SOCIAL WORKER NAME: field overlaid across First, Middle, Last input fields. AND Save the date <MM/DD/YYYY> the form was accepted at the end of the SOCIAL WORKER NAME: field overlaid across First, Middle, Last input fields. AND Save the Worker Number in the SOCIAL WORKER IDENTIFICATION NUMBER field.
2 93	2 1 3 78	➡ CI-824004 - DSD BR CM 293 IMPLEMENTED	Electronic Forms - Edit hyperlink	User selects the Edit... hyperlink on the Electronic Forms screen	Display the Edit Electronic Form Pop-Up screen AND WHEN The Edit button is selected THEN Display the editable electronic form in a new window
2 94	2 1 3 78	➡ CI-824011 - DSD BR CM 294 IMPLEMENTED	Electronic Forms - add request to complete e-form to Message Center in ESP	User selects the Send button on the Send Electronic Form to ESP Pop-Up	Insert the Electronic Form Completion Request message into the CONCERNROLEEFORMSDATA / CONCERNROLEEFORMSDATASNAPSHOT table for the Recipient
2 95	2 1 3 78	➡ CI-824014 - DSD BR CM 295 IMPLEMENTED	Electronic Forms - create SOC825 with or without Recipient phone number	User selects the Yes button on the Create Electronic Form Pop-Up AND SOC 825 is checked	Allow the action AND IF Recipient has a telephone number saved in Case Management THEN Pre-populate the 'Recipient's Telephone #' field ELSE IF Recipient does not have a telephone number saved in Case Management THEN 'Recipient's Telephone #' field remains blank
2 96	2 1 3 78	➡ CI-824042 - DSD BR CM 296 IMPLEMENTED	Electronic Forms - add Electronic Form Accepted message to Message Center in ESP	User selects the Yes button on the Accept Electronic Form Pop-Up AND Recipient/Provider is registered to ESP	Insert the Electronic Form Accepted message into the CONCERNROLEEFORMSDATA / CONCERNROLEEFORMSDATASNAPSHOT table for the Recipient/Provider

2 97	2 1 3 78	 CI-824043 - DSD BR CM 297 IMPLEMENTED	Electronic Forms - Submit Action in ESP	When a user submits an electronic form in ESP	<p>Form parameters are passed between AEM ESP and Case Management</p> <p>AND</p> <p>Updates the Electronic Forms table:</p> <ul style="list-style-type: none"> Action - updated to remove Resend to CSP... and Resend to ESP... action links, adds View..., Accept..., Reject... action links (History... link remains) Status - updated to Ready for Review <p>AND</p> <p>Creates History Snapshot record</p> <p>AND</p> <p>Update AEM via webservice: (AEM Internal Status)</p>
2 98	2 1 3 75 2 1 3 78	 CI-824070 - DSD BR CM 298 IMPLEMENTED	Accept Electronic Form SOC 295 - Save County Worker Electronic Signature	When a county worker selects the Yes button on the Accept Electronic Form Pop-Up for electronic SOC 295	<p>Save, "Worker Name, Worker Number (Electronic)" in the SIGNATURE of SOCIAL WORKER or AGENCY REPRESENTATIVE field</p> <p>AND</p> <p>Save the date <MM/DD/YYYY> the form was accepted in the SIGNATURE of SOCIAL WORKER or AGENCY REPRESENTATIVE field</p> <p>AND</p> <p>Save the social worker's telephone number in the TELEPHONE NUMBER field</p>
2 99	2 1 3 75 2 1 3 76 2 1 3 77	 CI-824083 - DSD BR CM 299 IMPLEMENTED	Create Message Pop-Up - Email Notification Preference (Recipient)	When the 'Send' or 'Send & New' button is selected on the Create Message Pop-Up AND The Recipient's notification preference is Email	<p>IF The High Priority checkbox is not selected THEN Send the IHSS - Notification of Message (ETSE65) email</p> <p>ELSE The High Priority checkbox is selected THEN Send the IHSS - Notification of High Priority Message (ETSE66) email</p>
3 00	2 1 3 75 2 1 3 88 2 1 3 89	 CI-824084 - DSD BR CM 300 IMPLEMENTED	Create Message Pop-Up - Text Notification Preference (Recipient)	When the 'Send' or 'Send & New' button is selected on the Create Message Pop-Up AND The Recipient's notification preference is Text	<p>IF The High Priority checkbox is not selected THEN Send the Notification of Message (TM65) text message</p> <p>ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Message (TM66) text message</p>

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (301-310)

No	R e q ID	CI	Description	When	Action
3 01	2 1 3 75 2 1 3 76 2 1 3 77 2 1 3 88 2 1 3 89	CI-824085 - DSD BR CM 301 IMPLEMENTED	Create Message Pop-Up - Both Email and Text Notification Preference (Recipient)	When the 'Send' or 'Send & New' button is selected on the Create Message Pop-Up AND The Recipient's notification preference is Both Email and Text	IF The High Priority checkbox is not selected THEN Send the Notification of Message (TM65) text message and the IHSS - Notification of Message (ETSE65) email ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Message (TM66) text message and the IHSS - Notification of High Priority Message (ETSE66) email
3 02	2 1 3 75 2 1 3 92 2 1 3 93	CI-824106 - DSD BR CM 302 IMPLEMENTED	Send Electronic Form to ESP Pop- Up - Email Notification Preference (Recipient)	When the 'Send' button is selected on the Send Electronic Form to ESP Pop- Up AND The Recipient's notification preference is Email	IF The High Priority checkbox is not selected THEN Send the IHSS - Notification of Electronic Form (ETSE71) email ELSE The High Priority checkbox is selected THEN Send the IHSS - Notification of High Priority Electronic Form (ETSE72) email
3 03	2 1 3 75 2 1 3 94 2 1 3 95	CI-824107 - DSD BR CM 303 IMPLEMENTED	Send Electronic Form to ESP Pop- Up - Text Notification Preference (Recipient)	When the 'Send' button is selected on the Send Electronic Form to ESP Pop- Up AND The Recipient's notification preference is Text	IF The High Priority checkbox is not selected THEN Send the Notification of Electronic Form (TM71) text message ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Electronic Form (TM72) text message

3 04	2 1 3 75	 CI-824108 - DSD BR CM 304 IMPLEMENTED	Send Electronic Form to ESP - Both Email and Text Notification Preference (Recipient)	When the 'Send' button is selected on the Send Electronic Form to ESP Pop-Up AND The Recipient's notification preference is Both Email and Text	IF The High Priority checkbox is not selected THEN Send the Notification of Electronic Form (TM71) text message and the IHSS - Notification of Electronic Form (ETSE71) email ELSE The High Priority checkbox is selected THEN Send the Notification of High Priority Electronic Form (TM72) text message and the IHSS - Notification of High Priority Electronic Form (ETSE72) email
3 05	2 1 3 75	 CI-824305 - DSD BR CM 305 IMPLEMENTED	Create Form Pop-Up – GEN 1365	When the County Worker selects the 'Save' button on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The form selected is 'SOC 821 - Assessment Of Need For Protective Supervision' OR 'SOC 321 - Request For Order And Consent ParaMedical Services'	The system will generate the NA Continuation GEN 1355 form in English, when English is the designated written language or when the written language is not supported. The NA Continuation GEN 1365 form will be included with the corresponding SOC form. These forms will be sent as a PDF to the corresponding Recipient's ESP Message Center Inbox.
3 06	2 1 3 78	 CI-824339 - DSD BR CM 306 IMPLEMENTED	Accept Electronic Form SOC 864 - Save County Worker Electronic Signature	When a county worker selects the 'Yes' button on the Accept Electronic Form Pop-Up for electronic SOC 864	Add the date <MM/DD/YYYY> the form was accepted in the Date: field AND Add the "<Worker's Name>, <Worker Number> (Electronic)" to the Signature: field IF The Recipient indicated that there are no changes from the prior year THEN The bottom County Staff Area will be used ELSE The Recipient indicated that there are changes from the prior year THEN The top County Staff Area will be used
3 07	2 1 3 75	 CI-824342 - DSD BR CM 307 IMPLEMENTED	Create Form Pop-Up - Email Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Email	Send the IHSS - Notification of Electronic Form (ETSE71) e-mail to the corresponding Recipient's email address
3 08	2 1 3 75	 CI-824343 - DSD BR CM 308 IMPLEMENTED	Create Form Pop-Up - Text Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Text	Send the Notification of Electronic Form (TM71) text message to the corresponding Recipient's phone number

3 09	2 1 3 75 2 1 3 92 2 1 3 94	 CI-824344 - DSD BR CM 309 IMPLEMENTED	Create Form Pop-Up - Both Email and Text Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Both Email and Text	Send the IHSS - Notification of Electronic Form (ETSE71) e-mail and Notification of Electronic Form (TM71) text message to the corresponding Recipient's email and phone number
3 10	2 1 3 78	 CI-824359 - DSD BR CM 310 IMPLEMENTED	Accept Electronic Form SOC 825 - Save County Worker Electronic Signature	When a county worker selects the Yes button on the Accept Electronic Form Pop-Up for electronic SOC 825	Save, "<Worker's Name>, <Worker Number> (Electronic) <MM/DD /YYYY>" to the "SIGNATURE OF IHSS SOCIAL WORKER:" field AND Save the "<Contact Phone>" in the "CONTACT PHONE #:" field

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Case Maintenance (311-320)

No	R e q ID	CI	Description	When	Action
3 11	2 1 3 78	 CI-824368 - DSD BR CM 311 IMPLEMENTED	Modify or Inactivate Form (3rd Party Form)	When a county worker clicks the Save button on the Modify and Inactivate Form Pop-Up AND The form selected is one of SOC 321, SOC 821, or SOC 873/874 AND The Mark as Inactivate/Not Mailed checkbox is selected AND The status is 'Sent to ESP'	Set the Form status to Inactivated AND Remove Due Date from the Form & Correspondence List screen AND Replace the '3rd party form message' in the users ESP Inbox with the '3rd party form Inactivated' message.
3 12	2 1 3 75	 CI-824371 - DSD BR CM 312 IMPLEMENTED	Create Form Pop-Up - 3rd Party Form Email Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Email AND The form selected is a 3rd party form	<p>Send the ESP 3rd Party Electronic Form email notification to the corresponding Recipient's email address AND IF</p> <p>The form selected is one of:</p> <ul style="list-style-type: none"> • SOC 321 • SOC 821 • SOC 873 • SOC 873L • SOC 873/874 Bundle • SOC 873L/874L Bundle <p>Send the ESP 3rd Party Electronic Form inbox notification to the corresponding Recipient's ESP as well</p> <p>Note: The link in the ESP inbox notification will display one PDF of the selected form with the selected supported language version and the English version appended to the end.</p>
3 13	2 1 3 75	 CI-824372 - DSD BR CM 313 IMPLEMENTED	Create Form Pop-Up - 3rd Party Form Text Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Text AND The form selected is a 3rd party form	<p>Send the ESP 3rd Party Electronic Form text message to the corresponding Recipient's phone number AND IF</p> <p>The form selected is one of:</p> <ul style="list-style-type: none"> • SOC 321 • SOC 821 • SOC 873 • SOC 873L • SOC 873/874 Bundle • SOC 873L/874L Bundle <p>Send the ESP 3rd Party Electronic Form inbox notification to the corresponding Recipient's ESP as well</p> <p>Note: The link in the ESP inbox notification will display one PDF of the selected form with the selected supported language version and the English version appended to the end.</p>
3 14	2 1 3 75	 CI-824373 - DSD BR CM 314 IMPLEMENTED	Create Form Pop-Up - 3rd Party Form Both Email and Text Notification Preference (Recipient)	When the 'Save' button is selected on the Create Form Pop-Up AND The print option selected is 'Send Electronic Copy to ESP' AND The Recipient's notification preference is Both Email and Text AND The form selected is a 3rd party form	<p>Send the ESP 3rd Party Electronic Form email notification and ESP 3rd Party Electronic Form text message to the corresponding Recipient's email and phone number AND IF</p> <p>The form selected is one of:</p> <ul style="list-style-type: none"> • SOC 321 • SOC 821 • SOC 873 • SOC 873L • SOC 873/874 Bundle • SOC 873L/874L Bundle <p>Send the ESP 3rd Party Electronic Form inbox notification to the corresponding Recipient's ESP as well</p> <p>Note: The link in the ESP inbox notification will display one PDF of the selected form with the selected supported language version and the English version appended to the end.</p>

3	2	CI-824396 - DSD BR CM 315 IMPLEMENTED	Electronic Forms – Reject Action	When the user selects the Reject hyperlink on the Electronic Form screen	Display the Reject Electronic Form Pop-Up AND IF The Reject Form button is selected THEN Update the Electronic Forms table: <ul style="list-style-type: none">• Action - updated to remove View, Accept, and Reject action links, (History action link remain)• Sent to - updated to the user who rejected the form• Status - updated from Ready For Review to Rejected AND Create History snapshot record AND Update AEM via webservice: The electronic form is deleted in AEM (AEM Internal Status)
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DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Overtime and Travel Time Violation Triggers

DSD 25/Recip CM & OS – Case Maintenance/Business Rules /Overtime and Travel Time Violation Triggers (1-10)

No	StarTeam ID	CI	Trigger Event	Overtime Calculation Description
1			Removed with CR 1089	
2			Removed with CR 1089	
3			Removed with CR 1089	

DSD 25/Recip CM & OS – Case Maintenance/Tasks /Notifications

See DSD Section 30 for all CMIPS Tasks and Notifications.

DSD 25/Recip CM & OS – Case Maintenance/Internal Interfaces

DSD 25/Recip CM & OS – Case Maintenance/Internal Interfaces/County Contractor Invoice Detail Request (PROO933A)

CI	Document Name
 CI-116358 - DSD INTF County Contractor Invoice Detail Request PROO933A IMPLEMENTED	DSD_INTF_County_Contractor_Invoice_Detail_Request_PROO933A.doc

The Case Management system sends contract or invoice data to the Payroll system. This interface identifies the characteristics and data elements in this interface.

Data Elements of Interface

This is the data layout for the County Contractor Invoice transaction from the Case Management system to the Payroll system.

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
County	String	2	IHSSCase	countyCode	Contractor County where the case is being served. Sample:= "01"
District	String	5	IHSSCase	Derived from prefPublicOfficeId	Contractor District office where the case is being served.
CCorHMFlag	String	2	N/A	N/A	Constant value = 'CC' (County Contractor)
MonthEffective	String	10	CCInvoice Details	serviceMonth	
Program	String	4	CCInvoice Details	fundingAidCode	The funding source determined for the Recipient (WPCS, IHSS-R, PCSP, IPO 1-5, CFCO)
Amount	String	4	CCInvoice Details	Amount	

Triggering Events

The completion of the monthly "County Contractor Funding Source" batch processing.

Screen Name	Trigger Point	Payroll Web service	Comments
N/A	Monthly processing of County Contractor Funding Source batch job	CountyContractorInvoice	Completion of the Monthly Batch process "County Contractor Funding Source".

Matching Criteria

CM Element Name	Payroll Element Name	Comments
Not Applicable	Not Applicable	

Errors

Condition	Error Message
Not Applicable	Not Applicable

Edits and Audits

When a transaction is sent to Payroll and logging is enabled, person data is logged in the Case Management log file.

DSD 25/Recip CM & OS – Case Maintenance/Internal Interfaces/Homemaker Timesheet Detail Request (PROO934A)

CI	Document Name
 CI-116367 - DSD INTF Homemaker Timesheet Detail Request PROO934A IMPLEMENTED	DSD_INTF_Homemaker_Timesheet_Detail_Request_PROO934A.doc

The Case Management system sends the Homemaker Timesheet details data to the Payroll system. This interface identifies the characteristics and data elements involved in this interface.

Data Elements of Interface

This is the data layout for the Homemaker Timesheet details transaction from the Case Management system to the Payroll system.

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
County	String	2	IHSSCase	countyCode	Homemaker County where the case is being served. Sample:= "01"
District	String	5	IHSSCase	Derived from prefPublicOfficeId	Homemaker District office where the case is being served.
CCorHMFlag	String	2	N/A	N/A	Constant value = 'HM' (Homemaker)
MonthEffective	String	10	HomemakerTimesheet	serviceMonth	
Program	String	4	IHSAuthorization	fundingAidCode	The funding source determined for the Recipient (WPCS, IHSS-R, PCSP, IPW1,IPW2-6, IPO 1-5, CFCO)
Amount	String	4	N/A	N/A	

Triggering Events

When the monthly "Homemaker Funding Source" batch processing it complete.

Screen Name	Trigger Point	Payroll Web service	Comments
N/A	Monthly processing of Homemaker Funding Source batch job	N/A	Completion of the Month Batch process "Homemaker Funding Source".

Matching Criteria

CM Element Name	Payroll Element Name	Comments
Not Applicable	Not Applicable	

Errors

Condition	Error Message
Not Applicable	Not Applicable

Edits and Audits

When a transaction is sent to Payroll and logging is enabled, person data is logged in the Case Management log file.

DSD 25/Recip CM & OS – Case Maintenance/Internal Interfaces/Advance Pay SOC Recipient IHSS Hours (PRMS944A)

CI
CI-823089 - DSD INTF Advance Pay SOC Recipient IHSS Hours PRMS944A IMPLEMENTED

For Advance Pay Recipients, when CMIPS determines the share of cost hours for the month, the system sends this information to Payroll so it can update its records to reflect the authorized hours after the SOC adjustment.

Data Elements of Interface

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
employeed	String	10	CaseParticipantRole	employeeID	Required: Payroll assigned ID that is used when interfacing with payroll.
serviceMonth	Date (CCYY-MM-DD)	10	CaseSOCHours	serviceMonth	Required: Service month for the information being sent
adjustedIHSSHours	String (HH:MM)	5	CaseSOCHours	authToPay	Required: The hours (IHSS) adjusted after SOC hours are deducted

Triggering Events

Screen Name	Trigger Point	Web Service	Fields	Comments
Monthly Spend-Down Batch Process	Batch	apSOCRecipientIHSSHours	<ul style="list-style-type: none"> Employee ID Service Month Adjusted IHSS Hours 	

Matching Criteria

CM Element Name	Payroll Element Name	Comments
CaseParticipantRole.employeed	EMPL.EMPLOYEE_ID	

Errors

Condition	Error Message
System Failure	Errors that occur during batch processing will be written to the batch error log.

Edits and Audits

When transaction is sent to Payroll and logging is enabled; all timesheet data sent to Payroll will be logged.

DSD 25/Recip CM & OS – Case Maintenance/Internal Interfaces/Long Paid Claims 35C Interface for Multi-Pay Warrants - ACMS102D

CI	
CI-823613 - DSD INTF Long Paid Claims 35C Interface for Multi-Pay Warrants ACMS102D IMPLEMENTED	

The Case Management system runs and selects records to include in a file to DHCS. This interface identifies the characteristics and data elements in this interface.

Internal Layout/System Mapping

Source: Case Management		Target: Interface File			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
ACMS102D	N/A	FILLER	N/A	N/A	N/A
	N/A	SEGMENT CNT	Binary(2)	Value = 01	R
	N/A	PLAN CODE	STRING(2)	Value = 01	R
	N/A	CLAIM TYPE	NUMERIC (1)	Value = 4 - Medical Claim	R
	WARRANT /WARRANTSTATUSCODE WARRANT/STATUSDATE WARRANT/ISSUEDATE WARRANT /SCOWARRANTNUMBER COUNTYCONTRACTORINVO ICE/PAIDDATE	CLAIM CONTROL NUMBER (CCN)	NUMERIC	<p>Value for DSS = YYJJJ00000000</p> <p>The CCN is a unique number that DHCS and DDS can both use to identify a claim. This number is 13 digits and generated based on the following logic.</p> <p>IP, SL, TR, IN and OT Claims:</p> <ul style="list-style-type: none"> If warrant status is 'VOID' then 'void date of the warrant in YYJJJ format + <the number of transactions in the multi-warrant> + last 7 digits of SCO warrant number for the voided warrant'. If warrant status is not 'VOID' then 'issue date of the warrant in the YYJJJ format + <the number of transactions in the multi-warrant> + last 7 digits of SCO warrant number for that warrant'. <p>E.g. multi-warrant included 3 transactions (i.e. timesheet, sick leave claim, and travel claim), the first digit after YYJJJ is '3'.</p> <p>WARRANT/WARRANTSTATUSCODE stores VOID status.</p> <p>WARRANT/STATUSDATE Stores the VOID date.</p>	R
	WARRANT/COUNTYCODE IHSSCASE/COUNTYCODE	COUNTY CODE	NUMERIC (2)	<p>Values are: 01-58</p> <p>Recipient County Code</p>	R
	WARRANT /FUNDINGSOURCECODE IHSSAUTHORIZATION /FUNDINGAIDCODE	AID CODE	STRING(2)	<p>Values are:</p> <ul style="list-style-type: none"> 2K – IHSS – Community First Choice Option 2L – IHSS – Plus Waiver 2M – IHSS – PCSP 2N – IHSS - Residual 	R
	N/A	CASE NUMBER	N/A	N/A	N/A
	N/A	FBU	N/A	N/A	N/A
	N/A	PERSON NUMBER	N/A	N/A	N/A

	CONCERNROLE /PRIMARYALTERNATEID CONCERNROLEALTERNATE ID/ALTERNATEID CCINVOICERECONLINE /RECIPIENTSSN	OTHER ID IDENTIFIER	STRING(1)	Values are: C = CIN 9 = SSN M = MEDS ID NOTE: Use SSN unless not known CONCERNROLE/PRIMARYALTERNATEID stores SSN. CONCERNROLEALTERNATEID/ALTERNATEID stores CIN CONCERNROLE/PRIMARYALTERNATEID stores SSN. CCINVOICERECONLINE/RECIPIENTSSN stores MEDS ID	R
	CONCERNROLE /PRIMARYALTERNATEID CONCERNROLEALTERNATE ID/ALTERNATEID CCINVOICERECONLINE /RECIPIENTSSN	SSN/MEDS ID /CIN	STRING(9)	Based on OTHER ID. Value in this field is filled in the order below and according to the highest value in the list. Recipient SSN, Recipient MEDS ID, Recipient CIN. If Recipient Alternative ID Type Social Security Number does not exist, send Alternative ID Type Conversion Duplicate value if it exists.	R
		SSN OR MEDS ID	STRING(9)	Recipient MEDS ID	R
		BENEFICIARY CIN	STRING(9)	Recipient CIN	R
	ALTERNATENAME /SURNAME ALTERNATENAME /FIRSTFORENAME CCINVOICERECONLINE/ RECIPIENTLASTNAME CCINVOICERECONLINE /RECIPIENTFIRSTNAME	BENEFICIARY NAME	STRING (15)	Name 'Last, First' to 15	R
	PERSON/GENDER	SEX	STRING(1)	Values are: M = Male F = Female Recipient's gender	R
	PERSON /ETHNICORIGINCODE	RACE	STRING(1)	Values are: 1 = White 2 = Hispanic 3 = Black 4 = Asian or Pacific Islander 5 = Alaskan Native or American Indian 7 = Filipino 8 = No Valid Data Reported 9 = No Response, Client Declined to State A = Amerasian C = Chinese H = Cambodian J = Japanese K = Korean M = Samoan N = Asian Indian P = Hawaiian R = Guamanian T = Laotian V = Vietnamese Z = Other Recipient's race	O
	N/A	BENEFICIARY HIC NUMBER	N/A	N/A	N/A
	WARRANT/PAYEEZIP	PROVIDER ZIP CODE	NUMERIC (5)	Values are: Provider Zip Or '00000'	R
	WARRANT /PAYEEZIPPLUSFOUR	PROVIDER ZIP + 4	NUMERIC (4)	Blank if extension unknown	O
	CONCERNROLE /PROVIDERID COUNTYCONTRACTOR /COUNTYCONTRACTORNUMBER	NPI MAIN	String (9)	For: IP = Provider ID SL = Sick Leave TR = Travel IN = Incentive OT = Other	O
	N/A	NPI CHECK DIGIT	N/A	N/A	N/A

	N/A	OTHER ID	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	BILLING PROVIDER TAXONOMY	N/A	N/A	N/A
	N/A	BILLING PROVIDER OWNER NUMBER	N/A	N/A	N/A
	N/A	BILLING PROVIDER LOCATION	N/A	N/A	N/A
	CONCERNROLE /COUNTYCODE COUNTYCONTRACTOR /COUNTYCODE	PROVIDER COUNTY	STRING(2)	Provider's county, values are: 01 – 58 = County Codes 99 = Out of State	O
	N/A	PROVIDER SPECIALTY	N/A	N/A	N/A
	N/A	REIMBURSEMENT RATE	N/A	N/A	N/A
	N/A	SPECIAL PROCESSING TYPE	N/A	N/A	N/A
	WARRANT /FUNDINGSOURCECODE IHSSAUTHORIZATION /FUNDINGAIDCODE	SPECIAL PROGRAM TYPE	STRING(1)	Values are: 1 = PCSP 2 = IPO 3 = WPCS 4 = CFCO	O
	N/A	COBA ID	N/A	N/A	N/A
	N/A	PAYER SEQUENCE CODE	N/A	N/A	N/A
	N/A	VENDOR CODE	STRING(2)	N/A	R
	N/A	FILLER	N/A	N/A	N/A
	N/A	DISCHARGE CODE	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	SURGERY CODE	N/A	N/A	N/A
		MEDICARE INDICATOR	N/A	N/A	N/A
	N/A	ADMISSION DATE	N/A	N/A	N/A
	N/A	DISCHARGE DATE	N/A	N/A	N/A
	WARRANT/ISSUEDATE COUNTYCONTRACTORINVOICE/PAIDDATE	CHECK DATE	DATE (CCYYMM DD-8)	SCO Issue Date	R
	WARRANT/ISSUEDATE COUNTYCONTRACTORINVOICE/PAIDDATE	ADJUDICATION DATE	DATE (CCYYMM DD-8)	SCO Issue Date	R
	WARRANTLINEITEM /AMOUNT CCINVOICERECONLINE /SOCCOLLECTEDAMT	PATIENT LIABILITY	DECIMAL	Value should be zeros or value with leading zeros. Share of Cost (SOC) amount collected NOTE: If ADJUSTMENT INDICATOR = 3 and previous SOC deduction is reversed this value must be negative.	R
	N/A	CO-INSURANCE AMOUNT	N/A	N/A	N/A
	N/A	OTHER COVERAGE AMOUNT	N/A	N/A	N/A

	WARRANTLINEITEM /AMOUNT WARRANTLINEITEM /LINEITEMSOURCECODE WARRANTLINEITEM /LINEITEMTYPECODE CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL AMOUNT BILLED	DECIMAL	Wage Statement: Gross + Employer Taxes – SOC NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.	R
	WARRANTLINEITEM /AMOUNT WARRANTLINEITEM /LINEITEMSOURCECODE WARRANTLINEITEM /LINEITEMTYPECODE CCINVOICERECONLINE /PAIDAMT	MEDI-CAL AMOUNT PAID	DECIMAL	Wage Statement: Gross + Employer Taxes – SOC NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.	R
	N/A	MEDICARE DEDUCTION AMOUNT	N/A	N/A	N/A
	N/A	MEDICARE DEDUCTION CODE	N/A	N/A	N/A
	N/A	FAMILY PLANNING CLAIM	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	WARRANT /WARRANTSTATISCODE	ADJUSTMENT INDICATOR	STRING(1)	Values are: • Blank = Initial Payment/Reissue/ Supplemental Payment – Payment Correction • 1 = Partial Positive Adjustment • 3 = Negative Adjustment – Void Entire Payment NOTE: CMIPS does not have functionality to generate partial positive adjustments at this time.	O
	N/A	DAYS STAY S9 (3)	N/A	N/A	N/A
	WARRANT /WARRANTSTATUSCODE WARRANT/ISSUEDATE WARRANT /SCOWARRANTNUMBER	ADJUSTMENT CCN	STRING	If ADJUSTMENT INDICATOR= BLANK this value will be blank or zeros in a file If ADJUSTMENT INDICATOR = 1 include previous CLAIM CONTROL NUMBER (CCN) here If ADJUSTMENT INDICATOR = 3 include previous CLAIM CONTROL NUMBER (CCN) here	O
	WARRANT /PAYMENTFROMDATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	FROM DATE OF SERVICE	DATE (CCYYMM DD-8)	1st day of the pay period	O
	WARRANT /PAYMENTTODATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	TO DATE OF SERVICE	DATE (CCYYMM DD-8)	Last day of the pay period	O
	N/A	FILLER	N/A	N/A	N/A
	WARRANT /FUNGSOURCECODE IHSSAUTHORIZATION /FUNDINGAIDCODE	AID CATEGORY	STRING(2)	Values are: • 2K – IHSS – Community First Choice Option • 2L – IHSS – Plus Waiver • 2M – IHSS – PCSP • 2N – IHSS - Residual	O
	MEDICALELGINFO/FFPIND	FFP INDICATOR	N/A	N/A	N/A
	N/A	CROSSOVER STATUS CODE	N/A	N/A	N/A

	N/A	OTHER COVERAGE INDICATOR	N/A	N/A	N/A
	PERSON/DATEOFBIRTH	BIRTHDATE	DATE (CCYYMM DD-8)	Recipient's Date of Birth	R
	N/A	FILLER	N/A	N/A	N/A
	N/A	CCS GHPP INDICATOR	N/A	N/A	N/A
	ALTERNATE NAME /SURNAME ALTERNATE NAME /FIRST FORENAME COUNTY CONTRACTOR /CONTRACTOR NAME	PROVIDER NAME	STRING (28)	Current Last Name, First Name to 28 characters	O
	N/A	MINOR CONSENT SERVICE	N/A	N/A	N/A
	N/A	RESTRICTED SERVICE	N/A	N/A	N/A
	N/A	FI CLAIM TYPE	STRING(2)	Values are: <ul style="list-style-type: none">• IP = Individual Provider Payment• SL= Sick Leave• TR = Travel• IN = Incentive• OT = Other	R
	N/A	HEALTH PLAN CODE	N/A	N/A	N/A
	N/A	FI PROVIDER TYPE	N/A	N/A	N/A
	N/A	CATEGORY OF SERVICE	N/A	N/A	N/A
	N/A	PRIMARY DIAGNOSIS	N/A	N/A	N/A
	N/A	SECONDARY DIAGNOSIS	N/A	N/A	N/A
	N/A	EMERGENCY INDICATOR	N/A	N/A	N/A
	N/A	ADMIT TYPE	N/A	N/A	N/A
	N/A	PATIENT STATUS	N/A	N/A	N/A
	N/A	PRIMARY SURGERY CODE	N/A	N/A	N/A
	N/A	PRI SURGICAL CODE PROVAL IND	N/A	N/A	N/A
	N/A	SECONDARY SURGERY CODE	N/A	N/A	N/A
	N/A	SEC SURGICAL CODE PROVAL IND	N/A	N/A	N/A
	N/A	SURGERY DATE	N/A	N/A	N/A
	N/A	CLAIM FORM IND	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	ADMIT SOURCE	N/A	N/A	N/A
	N/A	RELATED CAUSE CODE #1	N/A	N/A	N/A
	N/A	RELATED CAUSE CODE #2	N/A	N/A	N/A
	N/A	RELATED CAUSE CODE #3	N/A	N/A	N/A

	N/A	ADMITTING FACILITY PROVIDER NUMBER	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	RECORD ID NUMBER S9(15)	N/A	N/A	N/A
	N/A	EDIT FLAG	N/A	N/A	N/A
	N/A	EDIT FLAG 2	N/A	N/A	N/A
	N/A	EDIT ERROR CODE	N/A	N/A	N/A
	N/A	RECORD SOURCE CODE	N/A	N/A	N/A
	N/A	SEGMENT TYPE	STRING(1)	Value = M	R
	N/A	CCN LINE NUMBER	NUMERIC (2)	Value = 01	R
	WARRANTLINEITEM /AMOUNT CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL AMT BILLED	DECIMAL	Wage Statement: Gross + Employer Taxes – SOC NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.	R
	WARRANTLINEITEM /AMOUNT CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL ALLOWED AMT	DECIMAL	Wage Statement: Gross + Employer Taxes – SOC NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.	R
	WARRANTLINEITEM /AMOUNT CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL REIMBURSE AMT	DECIMAL	Wage Statement: Gross + Employer Taxes – SOC NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.	R
	N/A	MEDICARE AMT BILLED	N/A	N/A	N/A
	N/A	MEDICARE AMT PAID	N/A	N/A	N/A
	WARRANT /PAYMENTFROMDATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	FROM DATE OF SERVICE	DATE (CCYYMM DD-8)	1st day of the pay period	R
	WARRANT /PAYMENTTODATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	TO DATE OF SERVICE	DATE (CCYYMM DD-8)	Last day of the pay period	R
	N/A	PCCM IND	N/A	N/A	N/A
	N/A	OHC CODE	N/A	N/A	N/A
	N/A	EPSDT SERVICE IND	N/A	N/A	N/A
	N/A	MIO POS	STRING(1)	Values = 4 (Home)	R
	N/A	TAR NUMBER	N/A	N/A	N/A
	N/A	PRODUCT ID QUALIFIER	N/A	N/A	N/A
	N/A	UNIT OF MEASURE	N/A	N/A	N/A

	N/A	BASIS OF COST DETERMINATION	N/A	N/A	N/A
	N/A	DRUG REFILL NUMBER	N/A	N/A	N/A
	N/A	PART D EXCLUDED IND	N/A	N/A	N/A
	N/A	NCPDP REJECT CODE	N/A	N/A	N/A
	N/A	DISPENSING FEE CODE	N/A	N/A	N/A
	N/A	DAYS SUPPLY S9(3)	N/A	N/A	N/A
	N/A	DRUG UNIT PRICE S9(7)V99	N/A	N/A	N/A
	N/A	DRUG UNITS S9 (8)V999	N/A	N/A	N/A
	N/A	DRUG PROCEDURE IND	N/A	N/A	N/A
	N/A	DRUG PROCEDURE CODE /PRODUCT ID	N/A	N/A	N/A
	N/A	UPN	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	NDC LABELER	N/A	N/A	N/A
	N/A	NDC PRODUCT	N/A	N/A	N/A
	N/A	NDC PACKAGE	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	CODE PREFIX	N/A	N/A	N/A
	N/A	DRUG CODE	N/A	N/A	N/A
	N/A	DRUG MFG	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	PRODUCT ID QUALIFIER	N/A	N/A	N/A
	N/A	PROVAL IND	N/A	N/A	N/A
	WARRANT/HOURSPAIDMIN CCINVOICERECONLINE /PAIDHOURSMIN	UNITS S9(8)V999	STRING(6)	Value reported in minutes. Hours Paid on the warrant for IP, SL, TR, and OT (if payment based on hours/mins) claims. NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.	O
	N/A	PROCEDURE TYPE	N/A	N/A	N/A
	N/A	PROCEDURE IND	STRING(1)	Value = 9 (Local)	R
	N/A	PROCEDURE CODE	STRING(5)	Value = Z9525	R
	N/A	FILLER	N/A	N/A	N/A
	N/A	INPATIENT LOCAL CODE	N/A	N/A	N/A
	N/A	MODIFIER OR TOOTH 1	N/A	N/A	N/A
	N/A	MODIFIER OR TOOTH 2	N/A	N/A	N/A
	N/A	MODIFIER OR TOOTH 3	N/A	N/A	N/A

	N/A	MODIFIER OR TOOTH 4	N/A	N/A	N/A
	N/A	ACCOM 1	N/A	N/A	N/A
	N/A	ACCOM 2	N/A	N/A	N/A
	N/A	ACCOM H	N/A	N/A	N/A
	N/A	DRUG MANUFACTURER	N/A	N/A	N/A
	N/A	PRESCRIPTION NUMBER	N/A	N/A	N/A
	N/A	COPAY AMT S9 (7)V99	N/A	N/A	N/A
	N/A	OHC COPAY AMT S9(7)V99	N/A	N/A	N/A
	N/A	PRICE RESTRICTION	N/A	N/A	N/A
	CONCERNROLE /PRIMARYALTERNATEID	RENDERING/ OPERATING PROVIDER NUMBER	STRING (10)	Provider SSN	O
	N/A	RENDERING/ OPERATING TAXONOMY	N/A	N/A	N/A
	N/A	REND/OPER OWNER NUM	N/A	N/A	N/A
	N/A	REFERRING/ PREScribing PROVIDER NUMBER	N/A	N/A	N/A
	N/A	REFERRING/ PREScribing TAXONOMY	N/A	N/A	N/A
	N/A	EPSDT REFER CDS	N/A	N/A	N/A
	N/A	COPAY IND	N/A	N/A	N/A
	N/A	FI TOS	N/A	N/A	N/A
	N/A	DET OTHER COVERAGE AMT S9(7)V99	N/A	N/A	N/A
	N/A	ADDITIONAL FEE	N/A	N/A	N/A
	N/A	ORIG POS	N/A	N/A	N/A
	N/A	GTC	N/A	N/A	N/A
	N/A	STC	N/A	N/A	N/A
	N/A	HICL	N/A	N/A	N/A
	N/A	STR	N/A	N/A	N/A
	N/A	DOSE	N/A	N/A	N/A
	N/A	RT	N/A	N/A	N/A
	N/A	PS	N/A	N/A	N/A
	N/A	UDUU	N/A	N/A	N/A
	N/A	ENHANCED THERAPEUTIC CLS	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	MEDICAL SUPPLY IND	N/A	N/A	N/A
	N/A	TOOTH SURFACE 1	N/A	N/A	N/A
	N/A	TOOTH SURFACE 2	N/A	N/A	N/A

	N/A	TOOTH SURFACE 3	N/A	N/A	N/A
	N/A	TOOTH SURFACE 4	N/A	N/A	N/A
	N/A	TOOTH SURFACE 5	N/A	N/A	N/A
	N/A	BILLED CODE IND	N/A	N/A	N/A
	N/A	DET FFP IND	N/A	N/A	N/A
	N/A	REVENUE TYPE CODE	N/A	N/A	N/A
	N/A	REVENUE CODE	N/A	N/A	N/A
	N/A	CONFLICT	N/A	N/A	N/A
	N/A	INTERVENTION	N/A	N/A	N/A
	N/A	OUTCOME	N/A	N/A	N/A
	N/A	COMPOUND CODE	N/A	N/A	N/A
	N/A	COMPOUND DRUG ATTACHMENT	N/A	N/A	N/A
	N/A	COMPOUND DRUG NBR INGRED	N/A	N/A	N/A
	N/A	CCS GHPP LEGAL COUNTY	N/A	N/A	N/A
	N/A	CCS GHPP FUNDING CATEGORY	N/A	N/A	N/A
	N/A	FINANCIAL IND	N/A	Indicates if claim positively indicates Title 19 or State Only. Values are: <ul style="list-style-type: none">• T (payments for service periods when recipient FFP = Y)• S (FFP = N or Career Pathways payments)	N/A
	N/A	FUNDING INDICATOR	N/A	N/A	N/A
	N/A	DET AID CATEGORY	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	SEGMENT ID NUMBER	N/A	N/A	

Triggering Events

The completion of the monthly "County Contractor Funding Source" batch processing.

Screen Name	Trigger Point	Payroll Web service	Comments
N/A	Monthly processing of County Contractor Funding Source batch job	CountyContractorInvoice	Completion of the Monthly Batch process "County Contractor Funding Source". Then this interface will run immediately after.

Processing Criteria

This interface runs in CM and selects records to include in a file to DHCS based on the following criteria:

- Select all records on the LONGPAIDCLAIMSBATCH trigger where:
 - 1) Claim Type = IP/SL/TR/IN/OT and
 - 2) Status = Pending and
 - 3) Warrant ID aligns with a warrant record where Pay Type = MULTI and
 - 4) SCO Warrant number has SCO Issue Date in the given month and
 - 5) Warrant Status Code = retrieves all status codes

- For warrants in a Pending Void or Void status: The batch will pick up these warrants only if the Status Date is in the month for which the job is run, and Issue Date is a previous month.
 - Warrants which are issued and voided in the given month are not sent through this interface.
- Use the Warrant ID to fetch the split payments from the multi-pay warrant records on the WARRANTSOURCEDETAILS database entity table and create new payment records for each split transaction on the LONGPAIDCLAIMSBATCH trigger table and set the Status =‘Pending’. The batch will also create a claim control number (CCN) to each of these split payment records. For rows on the WARRANTSOURCEDETAILS:
 - If the Status = Processed, the batch creates a separate row for each transaction on the LONGPAIDCLAIMSBATCH table. For the corresponding row with the same Warrant ID where NPIMAIN = ‘Multi’, set Status = ‘Processed/Split’.
 - If the Status = Error, the batch will not create new rows for these records on the LONGPAIDCLAIMSBATCH table. The Status of the corresponding row with the same Warrant ID where NPIMAIN = ‘Multi’ will remain as ‘Pending’.
 - When the ACMS102d batch runs and pulls in the split warrants from the WSD table - it checks that warrant to get the issue date and status and when bringing those records over - sets the multi to processed/split and inserts the associated split rows with warrantstatuscode = VOID”
- Retrieve additional information (i.e. recipient and provider names, additional warrant data, funding source)
- When the batch completes, the job sets the status of the rows on the LONGPAIDCLAIMSBATCH trigger from ‘Pending’ to ‘Processed’.
 - Batch inserts new rows in the LONGPAIDCLAIMSBATCH table that align with each transaction row on the WARRANTSOURCEDETAILS table for the previous month where Status = ‘Processed’.
 - Batch modifies the RECORDSTATUS as follows:
 - For rows where NPIMAIN = ‘MULTI’ and corresponding Warrant ID rows on the WARRANTSOURCEDETAILS = ‘Processed’, set RecordStatus to ‘Processed/Split’
 - For rows where NPIMAIN = ‘MULTI’ and corresponding Warrant ID rows on the WARRANTSOURCEDETAILS = ‘Error’, set RecordStatus to ‘Processed’
 - File includes a separate record for each row on the LONGPAIDCLAIMSBATCH table in ‘Processed’ status
 - Each record in the file correctly populates data based on the mapping layout rules indicated
 - File(s) generated in EBCDIC format.
- When a payment in CM with Pay Type = Multiple is the result of more than 9 transactions across multiple pay types, as the ACMS102D batch job moves the split payment records from the WARRANTSOURCEDETAILS to the LONGPAIDBATCHCLAIMS trigger table, the job will group the pay types aligned to sick leave, travel, training time, and incentive claims and combine as separate records respectively, when assigning the Claim Control Number. Each record created on the trigger table will have unique CCN. Payments are groups as follows:
 - Sick Leave
 - Sick Leave Claim - SCLV
 - Travel
 - Travel Claim - TC
 - Travel Claim - Supplemental - TCS
 - Career Pathways Training Claim
 - Training Time Claim - CPTC
 - Career Pathways Incentive Claim
 - Training Incentive Claim - CPTI
 - One-Month Assignment Incentive Claim - CPOI
 - Six-Month Assignment Incentive Claim - CPSI
- When a payment in CM with Pay Type = Multiple is the result of 9 or less transactions across multiple pay types, the ACMS102D batch job will continue to create one record per transaction with a unique CCN on the LONGPAIDBATCHCLAIMS trigger table.

Matching Criteria

CM Element Name	Payroll Element Name	Comments
Not Applicable	Not Applicable	

Errors

Condition	Error Message
Not Applicable	Not Applicable

Edits and Audits

When a transaction is sent to Payroll and logging is enabled, person data is logged in the Case Management log file.

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Long Paid Claims (35C) Interface - ACMS102A

CI	Document Name
 CI-116371 - DSD EINTF Long Paid Claims 35C Interface ACMS102A IMPLEMENTED	DSD_EINTF_Long_Paid_Claims_35C_Interface_ACMS102A.doc

Internal Layout/System Mapping

Source: Case Management		Target: Interface File			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
ACMS102A	N/A	FILLER	N/A	N/A	N/A
	N/A	SEGMENT CNT	Binary(2)	Value = 01	R
	N/A	PLAN CODE	STRING(2)	Value = 01	R
	N/A	CLAIM TYPE	NUMERIC (1)	Value = 4 - Medical Claim	R
	WARRANT /WARRANTSTATUSCODE WARRANT/STATUSDATE WARRANT/ISSUEDATE WARRANT /SCOWARRANTNUMBER COUNTYCONTRACTORINVOICE/PAIDDATE	CLAIM CONTROL NUMBER (CCN)	NUMERIC	Value for DSS = YYJJJ00000000 The CCN should be unique in that DHCS and DDS can both use that field to identify a claim 13 digits generated based on the following logic. IP*, AP and RM Claims: <ul style="list-style-type: none"> If warrant status is 'VOID' then 'void date of the warrant in YYJJJ format + 1 + last 7 digits of SCO warrant number for the voided warrant'. If warrant status is not 'VOID' then 'issue date of the warrant in the YYYYJJ format + 1 + last 7 digits of SCO warrant number for that warrant'. CC Claims: 'county contractor invoice paid date in YYJJJ + 1 + 7 digit counter starts with 0000001' WARRANT/WARRANTSTATUSCODE stores VOID status. WARRANT/STATUSDATE Stores the VOID date.	R
	WARRANT/COUNTYCODE IHSSCASE/COUNTYCODE	COUNTY CODE	NUMERIC (2)	Values are: 01-58 Recipient County Code	R
	WARRANT /FUNDINGSOURCECODE IHSSAUTHORIZATION /FUNDINGAIDCODE	AID CODE	STRING(2)	Values are: <ul style="list-style-type: none"> 2K – IHSS – Community First Choice Option 2L – IHSS – Plus Waiver 2M – IHSS – PCSP 2N – IHSS - Residual 	R
	N/A	CASE NUMBER	N/A	N/A	N/A
	N/A	FBU	N/A	N/A	N/A
	N/A	PERSON NUMBER	N/A	N/A	N/A

	CONCERNROLE /PRIMARYALTERNATEID CONCERNROLEALTERNATEID /ALTERNATEID CCINVOICERECONLINE /RECIPIENTSSN	OTHER ID IDENTIFIER	STRING(1)	Values are: C = CIN 9 = SSN M = MEDS ID NOTE: Use SSN unless not known CONCERNROLE/PRIMARYALTERNATEID stores SSN. CONCERNROLEALTERNATEID/ALTERNATEID stores CIN CONCERNROLE/PRIMARYALTERNATEID stores SSN. CCINVOICERECONLINE/RECIPIENTSSN stores MEDS ID	R
	CONCERNROLE /PRIMARYALTERNATEID CONCERNROLEALTERNATEID /ALTERNATEID CCINVOICERECONLINE /RECIPIENTSSN	SSN/MEDS ID/CIN	STRING(9)	Based on OTHER ID. Value in this field is filled in the order below and according to the highest value in the list. Recipient SSN, Recipient MEDS ID, Recipient CIN. If Recipient Alternative ID Type Social Security Number does not exist, send Alternative ID Type Conversion Duplicate value if it exists.	R
		SSN OR MEDS ID	STRING(9)	Recipient MEDS ID	R
		BENEFICIARY CIN	STRING(9)	Recipient CIN	R
	ALTERNATENAME/SURNAME ALTERNATENAME /FIRSTFORENAME CCINVOICERECONLINE/ RECIPIENTLASTNAME CCINVOICERECONLINE /RECIPIENTFIRSTNAME	BENEFICIARY NAME	STRING (15)	Name 'Last, First' to 15	R
	PERSON/GENDER	SEX	STRING(1)	Values are: M = Male F = Female Recipient's gender	R
	PERSON/ETHNICORIGINCODE	RACE	STRING(1)	Values are: 1 = White 2 = Hispanic 3 = Black 4 = Asian or Pacific Islander 5 = Alaskan Native or American Indian 7 = Filipino 8 = No Valid Data Reported 9 = No Response, Client Declined to State A = Amerasian C = Chinese H = Cambodian J = Japanese K = Korean M = Samoan N = Asian Indian P = Hawaiian R = Guamanian T = Laotian V = Vietnamese Z = Other Recipient's race	O
	N/A	BENEFICIARY HIC NUMBER	N/A	N/A	N/A
	WARRANT/PAYEEZIP	PROVIDER ZIP CODE	NUMERIC (5)	Values are: Provider Zip Or '00000'	R
	WARRANT /PAYEEZIPPLUSFOUR	PROVIDER ZIP + 4	NUMERIC (4)	Blank if extension unknown	O
	CONCERNROLE/PROVIDERID COUNTYCONTRACTOR /COUNTYCONTRACTORNUMBER	NPI MAIN	String (9)	For: IP* = Provider ID CC = Contractor Number AP = Blank RM = Blank	O
	N/A	NPI CHECK DIGIT	N/A	N/A	N/A
	N/A	OTHER ID	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A

	N/A	BILLING PROVIDER TAXONOMY	N/A	N/A	N/A
	N/A	BILLING PROVIDER OWNER NUMBER	N/A	N/A	N/A
	N/A	BILLING PROVIDER LOCATION	N/A	N/A	N/A
	CONCERNROLE /COUNTYCODE COUNTYCONTRACTOR /COUNTYCODE	PROVIDER COUNTY	STRING(2)	Values are: 01 – 58 = County Codes 99 = Out of State For: IP* = Provider's County CC = Contract County AP = Blank RM = Blank	O
	N/A	PROVIDER SPECIALTY	N/A	N/A	N/A
	N/A	REIMBURSEMENT RATE	N/A	N/A	N/A
	N/A	SPECIAL PROCESSING TYPE	N/A	N/A	N/A
	WARRANT /FUNDINGSOURCECODE IHSSAUTHORIZATION /FUNDINGAIDCODE	SPECIAL PROGRAM TYPE	STRING(1)	Values are: 1 = PCSP 2 = IPO 3 = WPCS 4 = CFCO	O
	N/A	COBA ID	N/A	N/A	N/A
	N/A	PAYER SEQUENCE CODE	N/A	N/A	N/A
	N/A	VENDOR CODE	STRING(2)	Value = 89	R
	N/A	FILLER	N/A	N/A	N/A
	N/A	DISCHARGE CODE	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	SURGERY CODE	N/A	N/A	N/A
		MEDICARE INDICATOR	N/A	N/A	N/A
	N/A	ADMISSION DATE	N/A	N/A	N/A
	N/A	DISCHARGE DATE	N/A	N/A	N/A
	WARRANT/ISSUEDATE COUNTYCONTRACTORINVOICE/PAIDDATE	CHECK DATE	DATE (CCYYMM DD-8)	Value Sent Based On: • IP* = SCO Issue Date • CC = CC Paid Date • AP = SCO Issue Date • RM = SCO Issue Date	R
	WARRANT/ISSUEDATE COUNTYCONTRACTORINVOICE/PAIDDATE	ADJUDICATION DATE	DATE (CCYYMM DD-8)	Value Sent Based On: • IP* = SCO Issue Date • CC = CC Paid Date • AP = SCO Issue Date • RM = SCO Issue Date	R
	WARRANTLINEITEM/AMOUNT CCINVOICERECONLINE /SOCCOLLECTEDAMT	PATIENT LIABILITY	DECIMAL	Value should be zeros or value with leading zeros: • IP* = Share of Cost (SOC) amount collected • CC = SOC collected by contractor • AP = Share of Cost (SOC) amount collected NOTE: If ADJUSTMENT INDICATOR = 3 and previous SOC deduction is reversed this value must be negative.	R

	N/A	CO-INSURANCE AMOUNT	N/A	N/A	N/A
	N/A	OTHER COVERAGE AMOUNT	N/A	N/A	N/A
	WARRANTLINEITEM/AMOUNT WARRANTLINEITEM /LINEITEMSOURCECODE WARRANTLINEITEM /LINEITEMTYPECODE CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL AMOUNT BILLED	DECIMAL	<p>Values are:</p> <ul style="list-style-type: none"> • IP* (Individual Provider) = Wage Statement: Gross + Employer Taxes – SOC • HM (Homemaker) = HM Transaction Amount • CC (County Contractor) = Invoice Detail Approved Payment Amount • AP = Wage Statement: Gross + Estimated Employer Taxes – SOC • RM = Monthly Meals Allowance Paid <p>NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.</p>	R
	WARRANTLINEITEM/AMOUNT WARRANTLINEITEM /LINEITEMSOURCECODE WARRANTLINEITEM /LINEITEMTYPECODE CCINVOICERECONLINE /PAIDAMT	MEDI-CAL AMOUNT PAID	DECIMAL	<p>Values are:</p> <ul style="list-style-type: none"> • IP* (Individual Provider) = Wage Statement: Gross + Employer Taxes – SOC • HM (Homemaker) = HM Transaction Amount • CC (County Contractor) = Invoice Detail Approved Payment Amount • AP = Wage Statement: Gross + Estimated Employer Taxes – SOC • RM = Monthly Meals Allowance Paid <p>NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.</p>	R
	N/A	MEDICARE DEDUCTION AMOUNT	N/A	N/A	N/A
	N/A	MEDICARE DEDUCTION CODE	N/A	N/A	N/A
	N/A	FAMILY PLANNING CLAIM	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	WARRANT /WARRANTSTATUSCODE	ADJUSTMENT INDICATOR	STRING(1)	<p>Values are:</p> <ul style="list-style-type: none"> • Blank = Initial Payment/Reissue/ Supplemental Payment – Payment Correction • 1 = Partial Positive Adjustment • 3 = Negative Adjustment – Void Entire Payment <p>NOTE: CMIPS does not have functionality to generate partial positive adjustments at this time.</p>	O
	N/A	DAYS STAY S9(3)	N/A	N/A	N/A
	WARRANT /WARRANTSTATUSCODE WARRANT/ISSUEDATE WARRANT /SCOWARRANTNUMBER	ADJUSTMENT CCN	STRING	<p>If ADJUSTMENT INDICATOR= BLANK this value will be blank or zeros in CM XML</p> <p>If ADJUSTMENT INDICATOR = 1 include previous CLAIM CONTROL NUMBER (CCN) here</p> <p>If ADJUSTMENT INDICATOR = 3 include previous CLAIM CONTROL NUMBER (CCN) here</p>	O
	WARRANT /PAYMENTFROMDATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	FROM DATE OF SERVICE	DATE (CCYYMM DD-8)	<p>Values are:</p> <ul style="list-style-type: none"> • Individual Provider (IP*) = 1st day of the pay period • County Contractor = Contractor Service Period date • Advanced Pay = 1st day of Service Month • Restaurant/Meals = Start of payment period 	O
	WARRANT/PAYMENTTODATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	TO DATE OF SERVICE	DATE (CCYYMM DD-8)	<p>Values are:</p> <ul style="list-style-type: none"> • Individual Provider (IP*) = Last day of the pay period • County Contractor = Last day of the Contractor Service Period • Advanced Pay = Last day of Service Month • Restaurant/Meals = End of payment period 	O
	N/A	FILLER	N/A	N/A	N/A

	WARRANT /FUNCINGSOURCECODE IHSSAUTHORIZATION /FUNDINGAIDCODE	AID CATEGORY	STRING(2)	Values are: <ul style="list-style-type: none">• 2K – IHSS – Community First Choice Option• 2L – IHSS – Plus Waiver• 2M – IHSS – PCSP• 2N – IHSS - Residual	O
	MEDICALELGINFO/FFPIND	FFP INDICATOR	N/A	N/A	N/A
	N/A	CROSSOVER STATUS CODE	N/A	N/A	N/A
	N/A	OTHER COVERAGE INDICATOR	N/A	N/A	N/A
	PERSON/DATEOFBIRTH	BIRTHDATE	DATE (CCYYMM DD-8)	Recipient's Date of Birth	R
	N/A	FILLER	N/A	N/A	N/A
	N/A	CCS GHPP INDICATOR	N/A	N/A	N/A
	ALTERNATENAME/SURNAME ALTERNATENAME /FIRSTFORENAME COUNTYCONTRACTOR /CONTRACTORNNAME	PROVIDER NAME	STRING (28)	For the following values are: <ul style="list-style-type: none">• IP* = Current Last Name, First Name to 28 characters• CC = Name of Contractor• AP = Blank• RM = Blank	O
	N/A	MINOR CONSENT SERVICE	N/A	N/A	N/A
	N/A	RESTRICTED SERVICE	N/A	N/A	N/A
	N/A	FI CLAIM TYPE	STRING(2)	Values are: <ul style="list-style-type: none">• IP = Individual Provider Payment• CC = Contract County Provider Authorized Payment• AP = Advanced Payment (no Provider)• RM = Restaurant and Meals (no Provider)• SL = Payments on Sick Leave• TR = Payments on Travel• IN = Payments on Career Pathways Incentive Claims• OT = Other Payments (such as Training)	R
	N/A	HEALTH PLAN CODE	N/A	N/A	N/A
	N/A	FI PROVIDER TYPE	N/A	N/A	N/A
	N/A	CATEGORY OF SERVICE	N/A	N/A	N/A
	N/A	PRIMARY DIAGNOSIS	N/A	N/A	N/A
	N/A	SECONDARY DIAGNOSIS	N/A	N/A	N/A
	N/A	EMERGENCY INDICATOR	N/A	N/A	N/A
	N/A	ADMIT TYPE	N/A	N/A	N/A
	N/A	PATIENT STATUS	N/A	N/A	N/A
	N/A	PRIMARY SURGERY CODE	N/A	N/A	N/A
	N/A	PRI SURGICAL CODE PROCVAL IND	N/A	N/A	N/A
	N/A	SECONDARY SURGERY CODE	N/A	N/A	N/A
	N/A	SEC SURGICAL CODE PROCVAL IND	N/A	N/A	N/A
	N/A	SURGERY DATE	N/A	N/A	N/A
	N/A	CLAIM FORM IND	N/A	N/A	N/A

	N/A	FILLER	N/A	N/A	N/A
	N/A	ADMIT SOURCE	N/A	N/A	N/A
	N/A	RELATED CAUSE CODE #1	N/A	N/A	N/A
	N/A	RELATED CAUSE CODE #2	N/A	N/A	N/A
	N/A	RELATED CAUSE CODE #3	N/A	N/A	N/A
	N/A	ADMITTING FACILITY PROVIDER NUMBER	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	RECORD ID NUMBER S9(15)	N/A	N/A	N/A
	N/A	EDIT FLAG	N/A	N/A	N/A
	N/A	EDIT FLAG 2	N/A	N/A	N/A
	N/A	EDIT ERROR CODE	N/A	N/A	N/A
	N/A	RECORD SOURCE CODE	N/A	N/A	N/A
	N/A	SEGMENT TYPE	STRING(1)	Value = M	R
	N/A	CCN LINE NUMBER	NUMERIC (2)	Value = 01	R
	WARRANTLINEITEM/AMOUNT CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL AMT BILLED	DECIMAL	<p>Values are:</p> <ul style="list-style-type: none"> • IP* (Individual Provider) = Wage Statement: Gross + Employer Taxes – SOC • HM (Homemaker) = HM Transaction Amount • CC (County Contractor) = Invoice Detail Approved Payment Amount • AP = Wage Statement: Gross + Estimated Employer Taxes – SOC • RM = Monthly Meals Allowance Paid <p>NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.</p>	R
	WARRANTLINEITEM/AMOUNT CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL ALLOWED AMT	DECIMAL	<p>Values are:</p> <ul style="list-style-type: none"> • IP* (Individual Provider) = Wage Statement: Gross + Employer Taxes – SOC • HM (Homemaker) = HM Transaction Amount • CC (County Contractor) = (CC billed hours /60.0) * CC billed rate + SOC collected Amount from CC Invoice Recon Line • AP = Wage Statement: Gross + Estimated Employer Taxes – SOC • RM = Monthly Meals Allowance Paid <p>NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.</p>	R
	WARRANTLINEITEM/AMOUNT CCINVOICERECONLINE /BILLEDRATE CCINVOICERECONLINE /SOCCOLLECTEDAMT CCINVOICERECONLINE /BILLEDHOURSMIN	MEDI-CAL REIMBURSE AMT	DECIMAL	<p>Values are:</p> <ul style="list-style-type: none"> • IP* (Individual Provider) = Wage Statement: Gross + Employer Taxes – SOC • HM (Homemaker) = HM Transaction Amount • CC (County Contractor) = (CC billed hours /60.0) * CC billed rate + SOC collected Amount from CC Invoice Recon Line • AP = Wage Statement: Gross + Estimated Employer Taxes – SOC • RM = Monthly Meals Allowance Paid <p>NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.</p>	R
	N/A	MEDICARE AMT BILLED	N/A	N/A	N/A
	N/A	MEDICARE AMT PAID	N/A	N/A	N/A

	WARRANT /PAYMENTFROMDATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	FROM DATE OF SERVICE	DATE (CCYYMM DD-8)	Values are: <ul style="list-style-type: none">• Individual Provider (IP*) = 1st day of the pay period• County Contractor = Contractor Service Period date• Advanced Pay = 1st day of Service Month• RM = 1st day of Service Period	R
	WARRANT/PAYMENTTODATE CCINVOICERECONLINE /BILLEDMONTH CCINVOICERECONLINE /SERVICEPERIOD	TO DATE OF SERVICE	DATE (CCYYMM DD-8)	Values are: <ul style="list-style-type: none">• Individual Provider (IP*) = Last day of the pay period• County Contractor = Last day of the Contractor Service Period• Advanced Pay = Last day of Service Month• RM = Last day of Service Period	R
	N/A	PCCM IND	N/A	N/A	N/A
	N/A	OHC CODE	N/A	N/A	N/A
	N/A	EPSDT SERVICE IND	N/A	N/A	N/A
	N/A	MIO POS	STRING(1)	Values = 4 (Home)	R
	N/A	TAR NUMBER	N/A	N/A	N/A
	N/A	PRODUCT ID QUALIFIER	N/A	N/A	N/A
	N/A	UNIT OF MEASURE	N/A	N/A	N/A
	N/A	BASIS OF COST DETERMINATION	N/A	N/A	N/A
	N/A	DRUG REFILL NUMBER	N/A	N/A	N/A
	N/A	PART D EXCLUDED IND	N/A	N/A	N/A
	N/A	NCPDP REJECT CODE	N/A	N/A	N/A
	N/A	DISPENSING FEE CODE	N/A	N/A	N/A
	N/A	DAYS SUPPLY S9 (3)	N/A	N/A	N/A
	N/A	DRUG UNIT PRICE S9(7)V99	N/A	N/A	N/A
	N/A	DRUG UNITS S9(8) V999	N/A	N/A	N/A
	N/A	DRUG PROCEDURE IND	N/A	N/A	N/A
	N/A	DRUG PROCEDURE CODE/PRODUCT ID	N/A	N/A	N/A
	N/A	UPN	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	NDC LABELER	N/A	N/A	N/A
	N/A	NDC PRODUCT	N/A	N/A	N/A
	N/A	NDC PACKAGE	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	CODE PREFIX	N/A	N/A	N/A
	N/A	DRUG CODE	N/A	N/A	N/A
	N/A	DRUG MFG	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	PRODUCT ID QUALIFIER	N/A	N/A	N/A
	N/A	PROCVAL IND	N/A	N/A	N/A

	WARRANT/HOURSPAIDMIN CCINVOICERECONLINE /PAIDHOURSMIN	UNITS S9(8)V999	STRING(6)	Value reported in minutes. Hours Paid on the warrant for IP* and AP claims. Paid Hours on the CC invoice recon line. Value for RM is zeros or blank in file. NOTE: If ADJUSTMENT INDICATOR = 3 this value must be negative.	O
	N/A	PROCEDURE TYPE	N/A	N/A	N/A
	N/A	PROCEDURE IND	STRING(1)	Value = 9 (Local)	R
	N/A	PROCEDURE CODE	STRING(5)	Value = Z9525	R
	N/A	FILLER	N/A	N/A	N/A
	N/A	INPATIENT LOCAL CODE	N/A	N/A	N/A
	N/A	MODIFIER OR TOOTH 1	N/A	N/A	N/A
	N/A	MODIFIER OR TOOTH 2	N/A	N/A	N/A
	N/A	MODIFIER OR TOOTH 3	N/A	N/A	N/A
	N/A	MODIFIER OR TOOTH 4	N/A	N/A	N/A
	N/A	ACCOM 1	N/A	N/A	N/A
	N/A	ACCOM 2	N/A	N/A	N/A
	N/A	ACCOM H	N/A	N/A	N/A
	N/A	DRUG MANUFACTURER	N/A	N/A	N/A
	N/A	PREScription NUMBER	N/A	N/A	N/A
	N/A	COPAY AMT S9(7)V99	N/A	N/A	N/A
	N/A	OHC COPAY AMT S9(7)V99	N/A	N/A	N/A
	N/A	PRICE RESTRICTION	N/A	N/A	N/A
	CONCERNROLE /PRIMARYALTERNATEID	RENDERING/OPERATING PROVIDER NUMBER	STRING(10)	Value for: • IP* = Provider SSN • CC = Blank • AP = Blank • RM = Blank	O
	N/A	RENDERING/OPERATING TAXONOMY	N/A	N/A	N/A
	N/A	REND/OPER OWNER NUM	N/A	N/A	N/A
	N/A	REFERRING/PRESCRIBING PROVIDER NUMBER	N/A	N/A	N/A
	N/A	REFERRING/PRESCRIBING TAXONOMY	N/A	N/A	N/A
	N/A	EPSDT REFER CDS	N/A	N/A	N/A
	N/A	COPAY IND	N/A	N/A	N/A
	N/A	FI TOS	N/A	N/A	N/A
	N/A	DET OTHER COVERAGE AMT S9(7)V99	N/A	N/A	N/A

	N/A	ADDITIONAL FEE	N/A	N/A	N/A
	N/A	ORIG POS	N/A	N/A	N/A
	N/A	GTC	N/A	N/A	N/A
	N/A	STC	N/A	N/A	N/A
	N/A	HICL	N/A	N/A	N/A
	N/A	STR	N/A	N/A	N/A
	N/A	DOSE	N/A	N/A	N/A
	N/A	RT	N/A	N/A	N/A
	N/A	PS	N/A	N/A	N/A
	N/A	UDUU	N/A	N/A	N/A
	N/A	ENHANCED THERAPEUTIC CLS	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	MEDICAL SUPPLY IND	N/A	N/A	N/A
	N/A	TOOTH SURFACE 1	N/A	N/A	N/A
	N/A	TOOTH SURFACE 2	N/A	N/A	N/A
	N/A	TOOTH SURFACE 3	N/A	N/A	N/A
	N/A	TOOTH SURFACE 4	N/A	N/A	N/A
	N/A	TOOTH SURFACE 5	N/A	N/A	N/A
	N/A	BILLED CODE IND	N/A	N/A	N/A
	N/A	DET FFP IND	N/A	N/A	N/A
	N/A	REVENUE TYPE CODE	N/A	N/A	N/A
	N/A	REVENUE CODE	N/A	N/A	N/A
	N/A	CONFLICT	N/A	N/A	N/A
	N/A	INTERVENTION	N/A	N/A	N/A
	N/A	OUTCOME	N/A	N/A	N/A
	N/A	COMPOUND CODE	N/A	N/A	N/A
	N/A	COMPOUND DRUG ATTACHMENT	N/A	N/A	N/A
	N/A	COMPOUND DRUG NBR INGRED	N/A	N/A	N/A
	N/A	CCS GHPP LEGAL COUNTY	N/A	N/A	N/A
	N/A	CCS GHPP FUNDING CATEGORY	N/A	N/A	N/A
	N/A	FINANCIAL IND	STRING(1)	Indicates if claim positively indicates Title 19 or State Only. Values are: <ul style="list-style-type: none">• T (payments for service periods when recipient FFP = Y)• S (FFP = N or Career Pathways payments)	N/A
	N/A	FUNDING INDICATOR	N/A	N/A	N/A
	N/A	DET AID CATEGORY	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A

	N/A	SEGMENT ID NUMBER	N/A	N/A	N/A
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IP*: This also applies to Sick Leave (SL), Travel (TR), Incentive (IN) and Other (OT) claim types.

Transaction Trigger Events

N/A

Processing Criteria

This interface sends Provider (IP) claims, county contractor (CC) claims, advanced payment (AP) claims and restaurant/meals allowance (RM) claims to the DHCS.

IP (SL, TR, IN, and OT) claims – All Provider warrants with a SCO warrant number that has either a SCO issue date in the given month or was voided in the given month in the system will be sent through this interface. Warrants which are issued and voided in the given month are filtered/not sent through this interface. Multi-pay warrants will be skipped and not displayed on this interface.

CC Claims - All county contractor (CC) claims paid in the given month in the system will be sent through this interface.

AP claims – All advanced payment warrants with a SCO warrant number that has either a SCO issue date in the given month or was voided in the given month in the system will be sent through this interface. Warrants which are issued and voided in the given month are filtered/not sent through this interface.

RM claims – All restaurant/meals warrants with a SCO warrant number that has either a SCO issue date in the given month or was voided in the given month in the system will be sent through this interface. Warrants which are issued and voided in the given month are filtered/not sent through this interface.

Error Processing

When all the required fields are not present in CMIPS write the information to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Section 25.2.5 No 32.

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/County Contractor Reconciliation Interface – CCXR3XXA

CI	Document Name
 CI-116359 - DSD EINTF County Contractor Reconciliation Interface CCXR3XXA IMPLEMENTED	DSD_EINTF_County_Contractor_Reconciliation_Interface_CCXR3XXA.doc

Internal Layout/System Mapping

Inbound/File Header

Source: Interface File		Target: Case Management			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
ccxr3xxa-CCYYMMDDHHMMSSnn	RECORD HEADER INDICATOR	RECORD HEADER INDICATOR	STRING(1)	Indicates Record Type – Values are: 1 = Header	R
	COUNTY NUMBER	COUNTYCONTRACTOR /COUNTYCODE	NUMERIC (2)	Values are: 07 = Contra Costa 38 = San Francisco 41 = San Mateo	R
	CONTRACTOR NUMBER	COUNTYCONTRACTOR/COUNTY CONTRACTOR NUMBER	NUMERIC (1)	Value is: 1	R
	SERVICE MONTH	COUNTYCONTRACTORINVOICE/ BILLINGMONTH	MMYY(4)	Month and year being billed	R
	SERVICE PERIOD	COUNTYCONTRACTORINVOICE/ SERVICEPERIOD	STRING(1)	Values are: A = Bimonthly billing – Days 1-15 B = Bimonthly billing – Days 16-31 C = Contractors submitting monthly billings	R
	INVOICE DATE	COUNTYCONTRACTORINVOICE/ INVOICEDATE	DATE (MMDDYY-6)	Invoice date submitted by the contractor	R
	INVOICE NUMBER	COUNTYCONTRACTORINVOICE/ INVOICE NUMBER	STRING(6)	Invoice number submitted by the contractor	R
	BEGIN DATE	COUNTYCONTRACTORINVOICE/ BEGINDATE	DATE (MMYY-4)	Contract begin date	R
	CONTRACTOR RATE	COUNTYCONTRACTORINVOICE/ BILLRATE	NUMERIC (5)	Format is five numeric characters with two decimal places, without the decimal	R
	CONTRACTOR NAME	CONTRACTOR NAME/ CONTRACTORNAME	STRING (30)		R
	FILLER	FILLER	STRING (80)		O

Transaction Detail

Source: Interface File		Target: Case Management			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)

ccxr3xxa- CCYYMMDDHHMMS Snnn	RECORD HEADER INDICATOR	RECORD HEADER INDICATOR	STRING(1)	Indicates Record Type – Values are: 2 = Recipients Detail Record	R
	RECIPIENT CASE NUMBER	CCINVOICEREC ONLINE/ RECIPIENTCAS ENUMBER	NUMERIC (7)	CMIPS case number	R
	RECIPIENT LAST NAME	CCINVOICEREC ONLINE/ RECIPIENTLAST NAME	STRING (17)		R
	RECIPIENT FIRST NAME	CCINVOICEREC ONLINE/ RECIPIENTFIRS TNAME	STRING (12)		R
	RECIPIENT MIDDLE INITIAL	CCINVOICEREC ONLINE/ RECIPIENTMIDD LEINITIAL	STRING(1)		O
	RECIPIENT SSN	CCINVOICEREC ONLINE/ RECIPIENTSSN	STRING(9)	Match Alternative ID Type Social Security Number, if it does not exist match against Alternative ID Type Conversion Duplicate	R
	RECIPIENT SERVICE MONTH	CCINVOICEREC ONLINE/ BILLEDMONTH	MMYY	Month being billed for which services were provided	R
	RECIPIENT SERVICE PERIOD	CCINVOICEREC ONLINE/ SERVICEPERIOD	STRING	Values are: A = Bimonthly billing – Days 1-15 B = Bimonthly billing – Days 16-31 C = Contractors submitting monthly billings	R
	RECIPIENT AUTHORIZED HOURS	N/A	HHMM		O
	RECIPIENT BILLED HOURS	CCINVOICEREC ONLINE/ BILLEDHOURSM IN	HHMM		O
	RECIPIENT CONTRACT RATE	CCINVOICEREC ONLINE/ BILLEDRATE	NUMERIC	Format is five numeric characters with two decimal places, without the decimal	R
	SOC OBLIGATED DATE	CCINVOICEREC ONLINE/ SOCOBLIGATED DATE	DATE (MMDDYY- 6)	Date Medi-Cal card swiped	O
	SOC COLLECTED	CCINVOICEREC ONLINE/ SOCCOLLECTE DAMT	NUMERIC	SOC collected by the contractor	O
	FILLER	FILLER	STRING		O

Transaction Trigger Events

N/A

Processing Criteria

Matching criteria is based on the case number and county code.

Error Processing

Refer to Section 25A EM #19a.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Refer to Section 25A BR #19b.

Tasks/Notifications

Refer to Section 30.6 No 17.

Screens

Refer to Section 25.2.2.5.

Refer to Section 25.2.2.6.

Refer to Section 25.2.2.7.

Refer to Section 25.2.2.8.

Refer to Section 25.2.2.9.

Refer to Section 25.2.2.10.

Reports

Refer to Section 28.10

Refer to Section 28.11

Refer to section 28.12

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/MEDS Daily Receive Interface – CMDR103B

CI	Document Name
 CI-116372 - DSD EINTF MEDS Daily Receive Interface CMDR103B IMPLEMENTED	DSD_EINTF_MEDS_Daily_Receive_Interface_CMDR103B.doc

Internal Layout/System Mapping

Inbound

Source: Interface File		Target: Case Management			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmdr103b	TYPE	MEDICALELIGINFO /UPDATETYPECODE	STRING(1)	Values are: 2 = New Eligible 3 = Continued Eligible	R
	ELIGIBILITY MONTH /YEAR	MEDICALELIGINFO /MEDICALELIGIBILITYMONTHDATE	DATE (CCYYMM-6)		R
	MEDS ID	MEDICALELIGINFO/ MEDSIDNUMBER	STRING(9)		R
	CIN + CD	MEDICALELIGINFO /MEDSCIN AND MEDICALELIGINFO /CINCHECKDIGIT	STRING (10)	CMIPS Value: CIN (9) CIN CHECK DIGIT (1)	R
	BIC ISSUE DATE	MEDICALELIGINFO/ BICISSUEDATE	DATE (CCYYMM DD-8)		O
	BIRTHDAY	MEDICALELIGINFO /MEDSBIRTHDATE	DATE (CCYYMM DD-8)		R

	IHSS ELIGIBILITY STATUS	MEDICALELGINFO/ IHSSELIGIBILITYSTATUS	NUMERIC (3)	<p>Values are:</p> <p>1st Digit = Medi-Cal/CMSP/Other Eligible Status 0 = Full scope Medi-Cal Eligible (includes zero SOC) with no conditions 1 = Full scope Medi-Cal LTC/SOC eligible 2 = LTC/SOC eligible with one or more Conditions 3 = Eligible with one or more conditions – Certified SOC, Restricted Services, Minor Consent, CMSP Coverage, Limited Scope Medi-Cal Coverage and/or Partial Health Care Plan (HCP) Coverage 4 = Medi-Cal eligible with full service Medi-Cal HCP coverage 5 = Medi-Cal or CMSP client with an unmet Share of Cost Obligation 6 = Eligible for a health or welfare program other than Medi-Cal or CMSP services 7 = Hold 8 = QMB eligible pending Medicare Part A & B confirmation 9 = Ineligible</p> <p>2nd Digit = Normal/exception eligibility 0 = Normal eligible 1 = Unconfirmed Immediate Need eligible reported more than one month prior 2 = Unconfirmed Immediate Need eligible reported 1 month prior 3 = Unconfirmed Immediate Need eligible reported in current month 4 = Forced eligible due to late termination 5 = Partial month eligibility (Healthy Families, etc.) 7 = Exception eligible 8 = Forced eligible from MEDS Hold 9 = Full month eligibility (Healthy Families, etc.)</p> <p>3rd Digit = Timelines/misc. information 1 = Regular eligible reported timely 2 = Regular eligible reported retroactively 3 = 3 month retroactive eligible 4 = Continuing eligible reported timely 5 = Continued eligible reported retroactively 6 = Ramos/Pickle/IHSS/Other extended eligible 7 = Aid paid pending Ramos/Myers 8 = Hold from LTC/SOC status 9 = Ineligible or regular hold</p>	O
	IHSS COUNT Y ID	MEDICALELGINFO/ IHSSCOUNTYID	STRING (14)	CMIPS Value: COUNTY (2) AID CODE (2) "9" + CIN (10)	R
	PRIMARY ELIGIBILITY STATUS	MEDICALELGINFO/ MEDICALPRIMARYELIG STATUSCODE	NUMERIC (3)	<p>Values are:</p> <p>1st Digit = Medi-Cal/CMSP/Other eligible status 0 = Full scope Medi-Cal eligible (includes zero SOC) with no conditions 1 = Full scope Medi-Cal LTC/SOC eligible 2 = LTC/SOC eligible with one or more conditions 3 = Eligible with one or more conditions – Certified SOC, Restricted Services, Minor Consent, CMSP Coverage, Limited Scope Medi-Cal Coverage and/or Partial Health Care Plan (HCP) Coverage 4 = Medi-Cal eligible with full service Medi-Cal HCP coverage 5 = Medi-Cal or CMSP client with an unmet share of cost obligation 6 = Eligible for a health or welfare program other than Medi-Cal or CMSP services 7 = Hold 8 = QMB eligible pending Medicare Part A & B confirmation 9 = Ineligible</p> <p>2nd Digit = Normal/exception eligibility 0 = Normal eligible 1 = Unconfirmed Immediate Need eligible reported more than one month prior 2 = Unconfirmed Immediate Need eligible reported 1 month prior 3 = Unconfirmed Immediate Need eligible reported in current month 4 = Forced eligible due to late termination 5 = Partial month eligibility (Healthy Families, etc.) 7 = Exception eligible 8 = Forced eligible from MEDS hold 9 = Full month eligibility (Healthy Families, etc.)</p> <p>3rd Digit = Timelines/misc. information 1 = Regular eligible reported timely 2 = Regular eligible reported retroactively 3 = Three month retroactive eligible 4 = Continuing eligible reported timely 5 = Continued eligible reported retroactively 6 = Ramos/Pickle/IHSS/ Other Extended eligible 7 = Aid Paid Pending Ramos/Myers 8 = Hold from LTC/SOC status 9 = Ineligible or regular hold</p>	R

	MEDI-CAL COUNT Y ID	MEDICALELIGINFO/ PRIMARYCOUNTYID	STRING (14)	<p>Medi-Cal identified by IHSS established hierarchy.</p> <p>COUNTY (2)</p> <p>MEDI-CAL AID CODE (2)</p> <p>MEDI-CAL SERIAL (7)</p> <p>MEDI-CAL FBU (1)</p> <p>MEDI-CAL PERSON (2)</p> <p>or</p> <p>If Individual is SSI/SSP:</p> <p>COUNTY (2)</p> <p>AID CODE (2)</p> <p>"9" + SSN</p> <p>If this field is blank it indicates that the individual is NOT eligible for Medi-Cal.*** CMIPS will treat this record as ineligible record. Eligibility Status is set to '999'. FFP flag is set to 'N'.</p>	O
	SOC AMOUNT	MEDICALELIGINFO /MEDICALSOC	NUMERIC (5)	99999 – Will be whole numbers only (could be spaces)	O
	PRIOR SOC AMOUNT	MEDICALELIGINFO /PRIORSOCAMOUNT	NUMERIC (5)	99999 – Whole number (could be spaces)	O
	IHSS SOC AMOUNT	MEDICALELIGINFO /IHSSSOCAMOUNT	NUMERIC (5)	99999 – or spaces.	O
	PRIMAR Y IE/RR COUNT Y ID	MEDICALELIGINFO /MEDSCOUNTYCODE AND MEDICALELIGINFO /MEDICALAIDCODE AND MEDICALELIGINFO /SERIAL MEDICALELIGINFO /MEDICALCASENUMBER	STRING (14)	<p>MEDS</p> <p>COUNTY (2)</p> <p>AID CODE (2)</p> <p>SERIAL (7)</p> <p>FBU (1)</p> <p>PERSON (2)</p>	O
	FFP Flag	MEDICALELIGINFO/ FFPIND	STRING(1)	<p>Y or N</p> <p>If MEDS Aid Code is 10, 20 or 60, set FFP to Y, otherwise set as indicated in file</p>	O
	CREATE DATE	N/A	N/A	N/A	N/A
	CREATE TIME	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	PENDING MC APPLICATION (APPLICATION FLAG)	MEDICALELIGINFO /APPLICATIONFLAG	STRING(1)	<p>Values are:</p> <p>C = Consortia Conversion Transaction – not a new app</p> <p>D = CWD annual re-evaluation, HF app referral</p> <p>E = CWD other than annual reevaluation, HF app referral</p> <p>F = Fair hearing exception referral (retro bridging)</p> <p>G = Pending app, general relief benefits, includes Medi-Cal</p> <p>N = Pending app, No Medi-Cal, No general relief</p> <p>O = Pending app, general relief benefits, no Medi-Cal</p> <p>P = Pending app, Includes Medi-Cal, no general relief</p> <p>B = Pending app, includes Medi-Cal and Healthy Families (HF), from HF/SPE</p> <p>H = Pending app, includes HF, from HF/SPE</p> <p>R = HF annual re-evaluation, Medi-Cal app referral</p> <p>S = Pending app, includes Medi-Cal, for HF/SPE</p> <p>Z = Pending app, No Medi-Cal, No HF, from HF/SPE</p> <p>I = IEVS Inquiry only – not a new application</p> <p>M = Pending app, includes Medi-Cal, from MEB</p> <p>W = Pending CHDP gateway application</p>	O
	MEDI-CAL DENIAL DATE	MEDICALELIGINFO/ MEDICALDENIALDATE	DATE (CCYYMM DD-8)		O

	MEDI-CAL DENIAL REASON	MEDICALELGINFO/ MEDICALDENIALREASONCODE	STRING(1)	<p>Values are:</p> <p>A = Client deceased B = Application withdrawn C = Moved out of state D = Loss of contact/unable to locate applicant E = Failure to cooperate F = Does not meet CA residency requirements G = Excess resources H = No program linkage I = Potential state only program eligible did not apply for ongoing Medi-Cal (MEB only) J = No deprivation K = Living in a public non-medical institution L = Existing AFDC/Medi-Cal/CMSP Recipient M = Existing SSI/SSP Recipient N = Receiving Medicaid in another state P = Duplicate pending application Q = IE/RR terminates accelerated enrollment (MEDS generated) R = Other S = Applicant can't apply for the person on the application Y = Erroneously reported application Z = No valid data reported (MEDS generated)</p> <p>1 = Premium not paid (HF only) 2 = Income does not meet requirements (HF only) 3 = Home address state missing or invalid (HF only) 4 = End date for employer sponsored insurance missing or invalid (HF only) 5 = Child is eligible for Medicare Part A and B (HF only) 6 = Funding not available (HF only) 7 = Child age 19 or over not eligible for HFP</p>	O
	MEDI-CAL APPLICATION DATE	MEDICALELGINFO /APPLICATIONDATE	DATE (CCYYMM DD-8)		O
	SSI LIVING ARRANGEMENT	MEDICALELGINFO /SSILIVINGARRANGE CODE	STRING(1)	<p>Values are:</p> <p>A = Own Household B = Another's Household C = Parent's Household (child cases only) D = Title XIX institution Blank = Individual is in a non-Title XIX institution or is outside the United States. Payment status is H10, N02, or N03.</p> <p>**Information may be out of date</p>	O
	OPTIONAL LIVING ARRANGEMENT	MEDICALELGINFO/ OPTIONALLIVINGARRANGE CODE	STRING(1)	<p>Values are:</p> <p>A = Independent living with cooking facilities B = Out of Home Care C = Living in household of another E = Eligible Disabled Child to age 18 living in home of parent, guardian, or relative by marriage Z = Recipient not eligible or waives optional supplementation</p> <p>**Information may be out of date</p>	O
	RV DUE MONTH	MEDICALELGINFO/ RVDUEMONTH	DATE(MM-2)	Values are: 01 – 12	O
	LAST RV COMPLETED DATE	MEDICALELGINFO/ LASTRVCOMPLETEDDATE	DATE (CCYYMM-6)		O

	IDENTITY DOC TYPE	MEDICALELGINFO/IDENTITYDOCTYPECODE	STRING(2)	<p>Values are:</p> <p>1A = United States Passport issued without limitation 1B = Certificate of Naturalization (Form N-550 or N-570) 1C = Certificate of Citizenship (Form N-560 or N-561)</p> <p>2A = United States passport issued with limitations 2B = Driver's license issued by U.S. State or Territory with a photograph or other identifying information such as name, age, sex, race, height, weight and eye color 2C = School identification card with a photograph 2D = U.S. military card or draft record 2E = Identification card issued by Federal, State, or local government with the same information as a driver's license (a photograph or other identifying information such as name, age, sex, race, height, weight and eye color) 2F = U.S. Military dependent's identification card 2G = Certificate of Degree of Indian Blood or other U.S. American Indian/Alaskan Native Tribal document with a photograph or other personal identifying information 2H = U.S. Coast Guard Merchant Mariner card 2Z = SSA confirmed U.S. Citizenship/Identity consistent with SSA data via the State Verification Exchange System (SVES)</p> <p>5A = Three corroborating identity documents 5B = Written Affidavit signed under penalty of perjury by a residential care facility director or administrator on behalf of a disabled individual institutionalized in the facility</p> <p>7A = School records including nursery or daycare records for a child under age 16 7B = Clinic, doctor or hospital record for a child under age 16 7W = Written Affidavit signed under penalty of perjury by a parent or guardian stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship) 7W = Written Affidavit signed under penalty of perjury by a parent, guardian or caretaker relative stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship, the child cannot obtain a school ID Card and the child does not have a driver's license) 7Z = Medi-Cal Application signed by a parent or guardian stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship)</p> <p>8B = Exempt from Verification – Confirmed Current SSI Eligible 8F = Exempt from Verification – Confirmed Medicare Entitlement 8G = Exempt from Verification – Confirmed receiving Title II Disability Benefits 8J = Exempt from Verification – Eligible under Foster Care or Adoption Assistance Program 8K = Exempt from Verification – Eligible under CalWORKs Cash Assistance Program 8P = Exempt from Verification – Eligible under Minor Consent Program 8Q = Exempt from Verification – Eligible under Deemed Infant Provision 8R = Exempt from Verification – Abandoned Baby Program eligible born in the U.S. 8S = Exempt from Verification – Confirmed Former SSI Eligible (No Longer SSI Eligible)</p> <p>9A = Unable to obtain identity documentation – Abandoned baby or child 9B = Unable to obtain identity documentation – Amnesia 9C = Unable to obtain identity documentation – Comatose client 9D = Unable to obtain identity documentation – Client otherwise incapacitated 9J = Unable to obtain identity documentation – County ended reasonable opportunity period due to client not making a good faith effort 9P = Unable to obtain identity documentation – Client says they cannot afford the cost to obtain an original document or written affidavit 9Q = Unable to obtain identity documentation – Client says they cannot locate an acceptable document and cannot get a written affidavit 9R = Unable to obtain identity documentation – Client requested end of reasonable opportunity period and did not provide any explanation or acceptable documentation 9R = Unable to obtain identity documentation - Client requested end of reasonable opportunity and did not provide any explanation or acceptable documentation 9S = SSN Verification removal also removed SSA Citizenship/Identity verification – alternate verification pending 9Z = New applicant who has not yet provided required identity documentation</p>	O
	CITIZENSHIP DOC TYPE	MEDICALELGINFO/CITIZENSHIPDOCTYPECODE	STRING(2)	<p>Values are:</p> <p>BR = Birth Records Match Requested for Client Born in California</p> <p>1A = United States Passport – issued without limitation 1B = Certificate of Naturalization (Form N-550 or N-570) 1C = Certificate of Citizenship (Form N-560 or N-561)</p>	O

2A = U.S. Public Birth Record issued before age 5 showing birth in one of the 50 U.S. States, the District of Columbia, American Samoa, Swain's Island, Puerto Rico (DOB on or after 1/13/41), Virgin Islands of the U.S. (DOB on or after 1/17/17), Northern Mariana Islands (DOB after 11/4/86, NMI local time) or Guam (DOB on or after 4/10/1899)

2B = U.S. Citizenship Based on Collective Naturalization for certain citizens or residents of Puerto Rico, U.S. Virgin Islands or Northern Mariana Islands (refer to the Citizenship ACWDL for specific documentation requirements for these individuals)

2C = Certification of Report of Birth (DS-1350)

2D = Consular Report of Birth Abroad of a Citizen of the United States of America (FS-240)

2E = Certification of Birth Abroad (Form FS-545)

2F = U.S. Citizen I.D. Card (Form I-197 or I-179)

2G = Northern Mariana Identification Card (I-873)

2H = American Indian Card (I-872) issued by the Department of Homeland Security with the classification code "KIC"

2I = Final Adoption Decree showing the child's name and a U.S. place of birth

2J = Evidence of U.S. Government civil service employment before 6/1/76

2K = Official U.S. Military record of service (e.g., DD-214 or similar official document) showing a U.S. place of birth

2L = Proof of adoption under the Child Citizenship Act for a child born outside the U.S.

2M = U.S. Citizenship verified via Systematic Alien Verification for Entitlements (SAVE)

2Z = SSA confirmed U.S. Citizenship consistent with SSA data via State Verification Exchange System (SVES)

3A = Extract of a hospital record on hospital letterhead established at the time of the person's birth showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date. NOTE: For a child under age 5, since the record could not have been created at least 5 years before the initial Medicaid application date, it must have been created near the time of birth.

3B = Life or health or other insurance record showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date

3C = Religious record showing a U.S. place of birth recorded within 3 months of birth

3D = Early school record showing a U.S. place of birth

4A = Federal or State census record showing U.S. citizenship or a U.S. place of birth and the person's age (generally for persons born 1900 through 1950)

4B = Seneca Indian tribal census record showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date

4C = Bureau of Indian Affairs tribal census record of the Navaho Indians showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date

4D = U.S. State Vital Statistics official notification of birth registration showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date

4E = An amended U.S. public birth record amended more than 5 years after the person's birth and created at least 5 years before the initial Medicaid application date

4F = Statement signed by the birth physician or midwife who was in attendance at the time of birth showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date

4G = Institutional admission papers from a nursing facility, skilled care facility or other institution showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date

4H = Medical (clinic, doctor or hospital but not immunization) record showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date. NOTE: For a child under age 5, since the record could not have been created at least 5 years before the initial Medicaid application date, it must have been created near the time of birth.

4I = Roll of Alaska Natives maintained by the Bureau of Indian Affairs

7W = Written Affidavits – requires affidavits signed under penalty of perjury by at least two individuals (other than the applicant or Recipient) of whom at least one is not related to the applicant or Recipient and who have personal knowledge of the event's establishing the client's claim of citizenship and who are able to prove their own citizenship and identity; also requires a separate affidavit signed under penalty of perjury from the applicant/Recipient or other knowledgeable individual explaining why documentary evidence of the claim of citizenship does not exist or cannot be readily obtained.

8B = Exempt from Verification – Confirmed Current SSI Eligible

8F = Exempt from Verification – Confirmed Medicare Entitlement

8G = Exempt from Verification – Confirmed receiving Title II Disability Benefits

8J = Exempt from Verification – Eligible under Foster Care or Adoption Assistance Program

8K = Exempt from Verification – Eligible under CalWORKs Cash Assistance Program

8P = Exempt from Verification – Eligible under Minor Consent Program

8Q = Exempt from Verification – Eligible under Deemed Infant Provision

8R = Exempt from Verification – Abandoned Baby Program eligible born in the U.S.

8S = Exempt from Verification – Confirmed Former SSI Eligible (No Longer SSI Eligible)

				9A = Unable to obtain Citizenship documentation – Abandoned baby or child 9B = Unable to obtain Citizenship documentation – Amnesia 9C = Unable to obtain Citizenship documentation – Comatose client 9D = Unable to obtain Citizenship documentation – Client otherwise incapacitated 9J = Unable to obtain Citizenship documentation – County ended reasonable opportunity period due to client not making a good faith effort 9P = Unable to obtain Citizenship documentation – Client says they cannot afford the cost to obtain an original document or written affidavit 9Q = Unable to obtain Citizenship documentation – Client says they cannot locate an acceptable document and cannot get a written affidavit 9R = Unable to obtain Citizenship documentation – Client requested end of reasonable opportunity period and did not provide any explanation or acceptable documentation 9S = SSN Verification removal also removed SSA Citizenship/Identity verification – alternate verification pending 9Z = New applicant who has not yet provided required citizenship documentation	
	INS DATE OF ENTRY	MEDICALELGINFO /INSENTRYDATE	DATE (CCYYMM-6)		O
	REFUGEE-ALIEN IND	MEDICALELGINFO /REFUGEEALIENINDICATOR	STRING(1)	A = Proven US citizen B = Alleged US citizen C = Conditional entrant admitted under INA section 203(a)(7) D = Deportation withheld admitted under INA section 243(h) or 241(b)(3) E = Amerasian refugee admitted under INA section 207 F = Refugee admitted under INA section 207 or 203(a)(7) – SDX G = Parolee admitted under INA section 212(d)(5) – SDX H = Silva vs. Levi alien – SDX K = Lawful Permanent Resident (LPR) L = Asylee admitted under INA section 208 but not Kurdish or Iraqi asylee M = Residents of Northern Mariana Islands – SDX N = Identity and citizenship of the individual verified by the Numident interface (code was previously A or B) – SDX P = Pre-Jan 1, 1972 alien (presumed lawfully admitted for permanent residence) – SDX Q = Alleged born in US, corroborated by a US birthplace shown on online Numident – SDX R = Other refugee admitted under INA section 207 but not Amerasian or Indochinese refugee S = Other aliens (not a temporary visa holder) T = Alleged PRUCOL U = Undocumented alien V = Visitor/Student/VISA and other aliens with temporary documentation W = Parolee admitted under INA section 212(d)(5) with a period of parole over one year X = Indochinese refugee admitted under INA section 207 Y = Parolee admitted under INA section 212(d)(5) with a period of parole less than one year Z = Kurdish or Iraqi asylee admitted under INA section 208 5 = Citizen child born to refugee parent(s) 8 = Cuban/Haitian entrant	O
	DISABILITY ONSET DATE	MEDICALELGINFO /DISABILITYONSETDATE	DATE (CCYYMM-6)		O

	SSN VER	MEDICALELGINFO/ SSNVERIFICATIONCODE	STRING(1)	<p>Values are:</p> <p>Valid User Input:</p> <p>R = Used on certain input transactions to indicate that the SSN verification code needs to be removed</p> <p>O = Used on certain input transactions to indicate that the SSN verification status was previously reported to MEDS</p> <p>1 = SSN reported by client, not sight verified, no SSA referral initiated</p> <p>2 = SSN application filed at SSA district office, confirmation received by reporting entity</p> <p>3 = SSN reported by client, sight verified by reporting entity</p> <p>5 = SSN reported by client, not sight verified, SSA referral initiated</p> <p>6 = Client does not have an SSN, SSA referral initiated</p> <p>8 = Client does not have an SSN and cannot get one - undocumented person</p> <p>9 = SSN not reported by client</p> <p>MEDS Assigned SSN Verification Codes:</p> <p>A = SSN verified via SSA NUMIDENT data match - SSA birthdate exactly matches MEDS</p> <p>B = SSN verified via SSA NUMIDENT data match - SSA birthdate exactly matches MEDS/Surname did not match</p> <p>C = SSN verified via SSA NUMIDENT data match - SSA birthdate does not exactly match MEDS</p> <p>D = SSN verified via SSA NUMIDENT data match - SSA birthdate does not exactly match MEDS/Surname did not match</p> <p>E = SSN verified via SSA NUMIDENT data match - SSA birthdate not available for exact MEDS match check</p> <p>F = SSN verified via SSA NUMIDENT data match - SSA birthdate not available for exact MEDS match check/Surname did not match</p> <p>H = SSN verified via Title II and Title XVI data match - failed SSA NUMIDENT data match</p> <p>I = SSN verified via Title II data match - failed SSA NUMIDENT data match</p> <p>J = SSN verified via Title XVI data match - failed SSA NUMIDENT data match</p> <p>K = SSN verified via Title II and/or Title XVI data match - SSN not recognized as an SSN issued by SSA in NUMIDENT data match</p> <p>L = Verification request pending for SSN reported as sight verified</p> <p>M = Verification request pending for SSN not reported as sight verified</p> <p>N = SSN verification failed SSA NUMIDENT data match on birthdate</p> <p>O = SSN verification failed SSA NUMIDENT data match on birthdate and failed Title XVI data match</p> <p>P = SSN verification failed SSA NUMIDENT data match on birthdate and failed Title II data match</p> <p>Q = SSN verification failed SSA NUMIDENT data match on birthdate and failed Title II and Title XVI data match</p> <p>S = SSN verification failed SSA NUMIDENT data match on surname or given name</p> <p>T = SSN verification failed SSA NUMIDENT data match on surname or given name and failed Title XVI data match</p> <p>U = SSN verification failed SSA NUMIDENT data match on surname or given name and failed Title II data match</p> <p>V = SSN verification failed SSA NUMIDENT data match on surname or given name and failed Title II and Title XVI data match</p> <p>W = SSN identified as verified via prior SSN verification process</p> <p>X = SSN identified as verified via prior SSN verification process but SSN verification code subsequently removed</p> <p>Y = SSN identified as unverified via prior SSN verification process</p> <p>% = SSN verification failed SSA NUMIDENT data match - probable transcription error identified</p> <p>& = SSN verification failed SSA NUMIDENT data match - SSN not recognized as an SSN issued by SSA</p> <ul style="list-style-type: none"> • = SSN identified as verified via SVES SSN verification process but SSN verification code subsequently removed by worker <p>1 = SSN identified as verified via SVES SSN verification process but SSN verification code removed by SSI/SSP update</p> <p>7 = No valid SSN verification status reported by entity reporting the SSN to MEDS</p> <p>! = SSN verification failed SSA NUMIDENT data match; given name missing</p>	O
	DEATH DATE	MEDICALELGINFO/ DEATHDATE	DATE (CCYYMM DD-8)		O
	DEATH SOURCE	MEDICALELGINFO/ DEATHSOURCECODE	STRING(1)	<p>Values are:</p> <p>B = Medicare Buy-in System</p> <p>C = CWD reported Death Date</p> <p>M = Medi-Cal Eligibility Branch</p> <p>O = Other State/County Health Program</p> <p>P = County Pickle status update</p> <p>R = Returned card</p> <p>S = SSA SSI/SSP update</p> <p>T = CWD reported Death Term Reason</p> <p>V = Vital Records System</p>	O

	HCP COUNTY	MEDICALELIGINFO/ HCPCOUNTYCODE	Numeric (2)	Look up to County Code Table for screen display for values 01 – 58. If value is other than 01 – 58 then write the numeric code value.	O
	HCP PLAN CODE	MEDICALELIGINFO/ HCPPLANCODE	String (3)	N/A	O
	HCP STATUS CODE	MEDICALELIGINFO/ HCPSTATUSCODE	String (2)	N/A	O

Transaction Trigger Events

N/A

Processing Criteria

Initial Matching is done based on CIN. If match is not found then record will be ignored. If Match is found, then system looks at the Eligibility Month and year, if record is found it will update the existing record, otherwise it will create a record for that Eligibility Month and Year.

Error Processing

When all the required fields are not present in interface file, record will be exceptioned out and written to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Refer to [DSD Section 25 - Business Rules](#) - No. 20

Tasks/Notifications

Refer to [Case Management Tasks/Notifications](#) - No. 2, 19, 30, and 34.

Screens

Refer to [Alternative IDs](#).
 Refer to [View Alternative ID](#).
 Refer to [Medi-Cal Eligibility List](#).
 Refer to [View Medi-Cal Eligibility](#).
 Refer to [Share of Cost Details](#).
 Refer to [Medi-Cal Eligibility Screen Flow](#)

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/SCI Daily Update - CMDR106B

CI	Document Name
CI-116394 - DSD EINTF SCI Daily Update CMDR106B IMPLEMENTED	DSD_EINTF_SCI_Daily_Upadte_CMDR106B.doc

Internal Layout/System Mapping

Source: Interface File		Target: Case Management			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmdr106b-CCYYMMDDHHMMSSnnn	CIN (CLIENT INDEX NUMBER)	CONCERNROLEALT ERNATEID /ALTERNATEID	STRING(9)	The CIN that application knows the client by.	R
	FIELD CODE	N/A	NUMERIC (3)	Indicates which field was changed. Values are: "403" – County Code "405" – Social Security Number "406" – Alien Number "408" – Date of Birth "409" – Date of Birth Type "410" – Sex Code "411" – Last Name "412" – First Name "413" – Middle Name "414" – Appellation "417" – Confidential Indicator "418" – Death Indicator "421" – CIN change resulting from MEDS **11 transaction. This field is used to determine which field was modified. (Example: CIN is changed or Gender is changed etc.)	R
	TRANSACTION CODE	N/A	STRING(2)	Indicates the type of transaction that generated the referral. Values are: Val"BL" – Batch Link "BU" – Batch Update "OL" – Online Link "OU" – Online Update "LC" – Result of MEDS **11 transaction (e.g., EW11, GZ11, etc.)	O
	AFTER IMAGE OF DATA FIELD	CONCERNROLEALT ERNATEID /ALTERNATEID	STRING (20)	The data after it was changed. Type of data depends on field code.	R
	BEFORE IMAGE OF DATA FIELD	CONCERNROLEALT ERNATEID /ALTERNATEID	STRING (20)	The data before it was changed. Type of data depends on field code.	R
	FROM APPLICATION TYPE	N/A	STRING(4)	Application that changed the data. Values are: "CATS" "CCS " "GHPP" "HF " – Healthy Families "MEDS" "SAWS" "SFIS" – Statewide Fingerprint Imaging System	O
	TO APPLICATION TYPE	N/A	STRING(4)	Application that referral is being routed to. Values are: "CATS" "CCS " "GHPP" "HF " – Healthy Families "MEDS" "SAWS" "SFIS" – Statewide Fingerprint Imaging System	O
	TO COUNTY	N/A	NUMERIC (2)	County that referral is being routed to – will reflect the last county reported by application. Values are "01" through "58".	O

	FILLER	N/A	N/A	N/A	N/A
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Transaction Trigger Events

N/A

Processing Criteria

Match will be done based on CIN. If FIELD CODE value is '421', then BEFORE IMAGE OF DATA field has the old CIN value and will be used as matching criteria. When FIELD CODE has value '421', then CIN will be updated using AFTER IMAGE OF DATA field value. If FIELD CODE value is other than '421', the record is ignored. Once CIN is updated, SCI re-clearance will be done.

Error Processing

When all the required fields are not present in interface file, record will be exceptioned out and written to log file. When CIN value has been updated, then CIN will be cleared through SCI system. Record will be exceptioned out if SCI clearance has errors.

Related Components

Business Process Functions

N/A

Business Flows

Refer to Section 20.2.1.15

Business Rules

Refer to Section 25.2.5 No 31.

Tasks/Notifications

N/A

Screens

Refer to Section 20.2.2.31 Alternate IDs.
Refer to Section 20.2.2.33 View Alternate ID.

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/SAWS Receive Interface – CMDR4XXA

CI	
 CI-116393 - DSD EINTF SAWS Receive Interface CMDR4XXA	IMPLEMENTED

Internal Layout/System Mapping

Inbound S2 Transaction:

Source: Case Management		Target: Interface File			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
Cmdr4xxa	TRANSACTION TYPE	N/A	STRING(2)	Value = S2	R
	CIN	CONCERNROLEALTERNATEID /ALTERNATEID	STRING(9)	CIN will be updated if case status is 'Pending'. Note: Transaction is not applied if CIN matches the CIN of another person in CMIPS	R
	IHSS COUNTY CODE	IHSSCASE/COUNTYCODE	NUMERIC (2)	State identified county number	R
	IHSS CASE NUMBER	CASEHEADER /CASEREFERENCE	STRING(7)		R
	APPLICANT LAST NAME	ALTERNATENAME/SURNAME	STRING (20)		R
	APPLICANT FIRST NAME	ALTERNATENAME /FIRSTFORENAME	STRING (15)	Populated with * or blank if individual has single name.	O
	APPLICANT MIDDLE INITIAL	ALTERNATENAME /OTHERFORENAME	STRING(1)		O
	APPLICANT SUFFIX	ALTERNATENAME/SUFFIX	STRING(3)		O
	APPLICANT SSN	CONCERNROLEALTERNATEID /ALTERNATEID	NUMERIC (9)	Blank if no SSN is used in SAWS Note: Transaction is not applied if APPLICANT SSN matches an SSN of another person in CMIPS	O
	APPLICANT DOB	PERSON/DATEOFBIRTH	Date (MMDDCC YY-8)		R
	SAWS COUNTY CODE	CASESAWSINFORMATION /SAWSCOUNTYCODE	NUMERIC (2)	State identified county number	R
	SAWS SERIAL	CASESAWSINFORMATION /SAWSSERIAL	STRING(7)	County Serial Number – 7 bytes	R
	SAWS ELIGIBILITY WORKER CODE	CASESAWSINFORMATION /SAWEWCODE	STRING(4)		R
	SAWS ELIGIBILITY WORKER LAST NAME	CASESAWSINFORMATION /SAWEWLASTNAME	STRING (20)		R
	SAWS ELIGIBILITY WORKER FIRST NAME	CASESAWSINFORMATION /SAWEWFIRSTNAME	STRING (15)	Populated with * or blank if individual has single name.	O
	SAWS ELIGIBILITY WORKER PHONE	CASESAWSINFORMATION /SAWEWPHONE	NUMERIC (10)		O
	SAWS ELIGIBILITY WORKER EMAIL	CASESAWSINFORMATION /SAWEWEMAIL	STRING (50)		O
	SAWS EW DISTRICT OFFICE CODE	CASESAWSINFORMATION /SAWEWDISTRICTOFFICECODE	STRING(3)		O

	SAWS EW DISTRICT OFFICE NAME	CASESAWSINFORMATION /SAWSEWDISTRICTOFFICENAME	STRING (20)		O
	SAWS APPLICATION DATE	N/A	Date (MMDDCC YY-8)	Date on SAWS1	O
	APPLICANT GENDER	PERSON/GENDER	STRING(1)	M/F	R
	CIN CHECK DIGIT	MEDICALELGINFO /CINCHECKDIGIT	NUMERIC (1)		R

Inbound S3 Transaction:

Source:		Target:			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
Cmdr4xxa	TRANSACTION TYPE	N/A	STRING(2)	Value = S3	R
	CIN	CONCERNROLEALTERNATEID /ALTERNATEID	STRING(9)		R
	IHSS COUNTY CODE	IHSSCASE/COUNTYCODE	NUMERIC (2)	State identified county number	R
	IHSS CASE NUMBER	CASEHEADER /CASEREFERENCE	STRING(7)		R
	RECIPIENT LAST NAME	ALTERNATENAME/SURNAME	STRING (20)		R
	RECIPIENT FIRST NAME	ALTERNATENAME /FIRSTFORENAME	STRING (15)	Populated with * or blank if individual has single name.	O
	RECIPIENT MIDDLE INITIAL	ALTERNATENAME /OTHERFORENAME	STRING(1)		O
	RECIPIENT SUFFIX	ALTERNATENAME/SUFFIX	STRING(3)		O
	RECIPIENT SSN	CONCERNROLEALTERNATEID /ALTERNATEID	NUMERIC (9)	Blank if no SSN is used in SAWS	O
	RECIPIENT DOB	PERSON/DATEOFBIRTH	Date (MMDDCC YY-8)		R
	SAWS COUNTY CODE	CASESAWSINFORMATION /SAWSCOUNTYCODE	NUMERIC (2)	State identified county number	R
	SAWS SERIAL	CASESAWSINFORMATION /SAWSSERIAL	STRING(7)	County serial number – 7 bytes	R
	SAWS ELIGIBILITY WORKER CODE	CASESAWSINFORMATION /SAWSEWCODE	STRING(4)		R
	SAWS ELIGIBILITY WORKER LAST NAME	CASESAWSINFORMATION /SAWSEWLASTNAME	STRING (20)		R
	SAWS ELIGIBILITY WORKER FIRST NAME	CASESAWSINFORMATION /SAWSEWFIRSTNAME	STRING (15)	Populated with * or blank if individual has single name.	O
	SAWS ELIGIBILITY WORKER PHONE	CASESAWSINFORMATION /SAWSEWPHONE	NUMERIC (10)		O
	SAWS ELIGIBILITY WORKER EMAIL	CASESAWSINFORMATION /SAWSEWEEMAIL	STRING (50)		O
	SAWS EW DISTRICT OFFICE CODE	CASESAWSINFORMATION /SAWSEWDISTRICTOFFICECODE	STRING(3)		O
	SAWS EW DISTRICT OFFICE NAME	CASESAWSINFORMATION /SAWSEWDISTRICTOFFICENAME	STRING (20)		O

	MEDI-CAL STATUS	CASESAWSINFORMATION /MEDICALSTATUS	Date (MMDDCC YY-8)	Values are: • Pending • Approved • Discontinued • Denied	R
	MEDS MEDI-CAL STATUS REASON	CASESAWSINFORMATION /MEDICALSTATUSREASON	STRING(1)	Status = Discontinued then use MEDS Term Reason Code for Medi-Cal Discontinuance (2 byte) OR Status = Denied then use MEDS Denial Reason Code (1 byte) with a leading blank Blank for other status'	R/O
	MEDI-CAL STATUS EFFECTIVE DATE	CASESAWSINFORMATION /MEDICALSTATUSEFFECTIVEDATE	NUMERIC (1)	Discontinuance = As written to the EW40 transaction – Last day of the month Pending = Application Date Approved = BDOA Denied = Application Date	R

Transaction Trigger Events

N/A

Processing Criteria

For S2 transaction, Match is done based upon IHSS CASE NUMBER.

Check if APPLICANT SSN matches existing SSN for another person in CMIPS

Check if CIN matches existing CIN for another person in CMIPS

Record will be ignored if matching criteria is not met, APPLICANT SSN matches existing SSN, or CIN matches existing CIN.

- If SSN or CIN matches existing value in CMIPS, generate appropriate task to the Case Owner.

For S3 transaction, Match is done based upon IHSS CASE NUMBER.

Record will be ignored if matching criteria is not met.

Error Processing

S2 and S3 transaction errors will be returned to SAWS with the error codes.

Element	Error Description	Error Code
S2		
Invalid Transaction Type	Record type a value not expected (Expected Values = S1, S2, S3, S5, S8, S9)	06
CIN	Value is blank or not alphaNUMERIC or not cleared by SCI	07
CIN Check Digit	Value is blank or not NUMERIC	23
IHSS Case Number	Value is blank or not NUMERIC	08
SAWS CASE NUMBER	Value is blank or not alphaNUMERIC	09
APPLICANT SSN matches existing SSN in CMIPS	An error will not be returned to SAWS, but the transactions will be skipped.	N/A
CIN matches existing CIN in CMIPS	An error will not be returned to SAWS, but the transactions will be skipped.	N/A
Any Other Error	Error not meeting other criteria	99
S3		
Invalid Transaction Type	Record type a value not expected (Expected Values = S1, S2, S3, S5, S8, S9)	06
CIN	Value is blank or not alphaNUMERIC	07
IHSS Case Number	Value is blank or not NUMERIC	08
SAWS CASE NUMBER	Value is blank or not alphaNUMERIC	09

Any Other Error	Error not meeting other criteria	99
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Related Components

Business Process Functions

N/A

Business Flows

[CI-116221](#) - DSD BP SAWS Notification of CIN for MediCal Referral
[CI-116215](#) - DSD BP Medi Cal Eligibility Status Change
[CI-117886](#) - DSD BP SAWS Notification of CIN Update
[CI-822854](#) - DSD BP SAWS Notification of SSN Update

Business Rules

[CI-111237](#) - DSD BR CM 30
[CI-111252](#) - DSD BR CM 48
[CI-111253](#) - DSD BR CM 49
[CI-111254](#) - DSD BR CM 50
[CI-822822](#) - DSD BR CM 262
[CI-822827](#) - DSD BR CM 263

Tasks/Notifications

[CI-111151](#) - DSD TSK TN CM 32
[CI-111132](#) - DSD NOTF TN CM 33
[CI-111135](#) - DSD NOTF TN CM 41
[CI-111136](#) - DSD NOTF TN CM 42
[CI-111137](#) - DSD NOTF TN CM 43
[CI-111138](#) - DSD NOTF TN CM 44
[CI-822806](#) - DSD TSK TN CM 76
[CI-822845](#) - DSD TSK TN CM 77

Screens

[CI-67745](#) - DSD SC Alternative IDs
[CI-67777](#) - DSD SC View Alternative ID
[CI-121490](#) - DSD SC MediCal Eligibility Information-SCI Lookup
[CI-81826](#) - DSD SC SAWS Eligibility Information
[CI-67560](#) - DSD SC View MediCal Eligibility-Case
[CI-67672](#) - DSD SC Share of Cost Details

Reports

N/A

Interfaces

[CI-71082](#) - IDD EINTF CMIPS SAWS Receive Interface CMDR4XXA

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/MSSP Interface - CMMR001A

CI	Document Name
 CI-116375 - DSD EINTF MSSP Interface CMMR001A CANCELLED	Cancelled with CR 1269

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHO/WPCS Demographics Receive Interface – CMMR101A

CI	Document Name
 CI-116368 - DSD EINTF IHO WPCS Demographics Receive Interface CMMR101A IMPLEMENTED	DSD_EINTF_IHO_WPCS_Demographics_ReceiveInterface_C MMR101A.doc

Internal Layout/System Mapping

Inbound

Source: Interface File		Target: Case Management			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmmr101a-CCYYMMDDHHMMSSnnn	CLIENT INDEX NUMBER	BATCHPROCESSRECORD/RECORDDATA	STRING(9)	Individual's CIN (CR 449)	R

Transaction Trigger Events

N/A

Processing Criteria

Client Index Numbers will be loaded into BATCHPROCESSRECORD and will be used during the Send process.

Error Processing

When all the required fields are not present in interface file, record will be exceptioned out and written to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Refer to Section 25.2.5 No.33.

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/MEDS Monthly Renewal Receive Interface - CMMR103D

CI	Document Name
CI-116376 - DSD EINTF MEDS Monthly Renewal Receive Interface CMMR103D IMPLEMENTED	DSD_EINTF_MEDS_Monthly_Renewal_Receive_Interface_CM MR103D.doc

Internal Layout/System Mapping

Inbound

Source: Interface File		Target: Case Management			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmmr103d	TYPE	MEDICALELGINFO /UPDATETYPECODE	STRING(1)	Values are: 1 = Future IHSS Eligible	R
	ELIGIBILITY MONTH /YEAR	MEDICALELGINFO /MEDICALELIGIBILITYMONTHDATE	DATE (CCYYMM-6)		R
	MEDS ID	MEDICALELGINFO/ MEDSIDNUMBER	STRING(9)		R
	CIN + CD	MEDICALELGINFO/MEDSCIN AND MEDICALELGINFO/CINCHECKDIGIT	STRING (10)		R
	BIC ISSUE DATE	MEDICALELGINFO/ BICISSUEDATE	DATE (CCYYMM DD-8)		O
	BIRTHDAY	MEDICALELGINFO/MEDSBIRTHDATE	DATE (CCYYMM DD-8)		R

	IHSS ELIGIBILIT Y STATUS	MEDICALELGINFO/ IHSSELIGIBILITYSTATUS	NUMERIC (3)	<p>Values are:</p> <p>1st Digit = Medi-Cal/CMSP/Other Eligible Status</p> <p>0 = Full Scope Medi-Cal Eligible (includes zero SOC) with no conditions</p> <p>1 = Full Scope Medi-Cal LTC/SOC Eligible</p> <p>2 = LTC/SOC Eligible with one or more conditions</p> <p>3 = Eligible with one or more conditions – Certified SOC, Restricted Services, Minor Consent, CMSP Coverage, Limited Scope Medi-Cal Coverage and/or Partial Health Care Plan (HCP) Coverage</p> <p>4 = Medi-Cal Eligible with Full Service Medi-Cal HCP Coverage</p> <p>5 = Medi-Cal or CMSP Client with an Unmet Share of Cost Obligation</p> <p>6 = Eligible for a Health or Welfare Program other than Medi-Cal or CMSP services</p> <p>7 = Hold</p> <p>8 = QMB Eligible pending Medicare part A & B confirmation</p> <p>9 = Ineligible</p> <p>2nd Digit = Normal/Exception Eligibility</p> <p>0 = Normal Eligible</p> <p>1 = Unconfirmed Immediate Need eligible reported more than one month prior</p> <p>2 = Unconfirmed Immediate Need eligible reported 1 month prior</p> <p>3 = Unconfirmed Immediate Need eligible reported in current month</p> <p>4 = Forced eligible due to late termination</p> <p>5 = Partial Month Eligibility (Healthy Families, etc.)</p> <p>7 = Exception Eligible</p> <p>8 = Forced eligible from MEDS Hold</p> <p>9 = Full Month Eligibility (Healthy Families, etc.)</p> <p>3rd Digit = Timelines/Misc. Information</p> <p>1 = Regular eligible reported timely</p> <p>2 = Regular eligible reported retroactively</p> <p>3 = 3 month retroactive eligible</p> <p>4 = Continuing eligible reported timely</p> <p>5 = Continued eligible reported retroactively</p> <p>6 = Ramos/Pickle/IHSS/Other Extended eligible</p> <p>7 = Aid Paid Pending Ramos/Myers</p> <p>8 = Hold from LTC/SOC status</p> <p>9 = Ineligible or Regular Hold</p>	O
	IHSS COUNTY ID	MEDICALELGINFO/ IHSSELIGIBILITYSTATUS	STRING (14)	<p>CMIPS Value:</p> <ul style="list-style-type: none"> • COUNTY (2) • AID CODE (2) • "9" + CIN (10) 	R

	MEDI-CAL ELIG STATUS	MEDICALELGINFO/ IHSSELIGIBILITYSTATUS	NUMERIC (3)	<p>Medi-Cal identified by IHSS established hierarchy.</p> <p>Values are:</p> <p>1st Digit = Medi-Cal/CMSP/Other Eligible Status</p> <p>0 = Full Scope Medi-Cal Eligible (includes zero SOC) with no conditions</p> <p>1 = Full Scope Medi-Cal LTC/SOC Eligible</p> <p>2 = LTC/SOC Eligible with one or more conditions</p> <p>3 = Eligible with one or more conditions – Certified SOC, Restricted Services, Minor Consent, CMSP Coverage, Limited Scope Medi-Cal Coverage and/or Partial Health Care Plan (HCP) Coverage</p> <p>4 = Medi-Cal Eligible with Full Service Medi-Cal HCP Coverage</p> <p>5 = Medi-Cal or CMSP Client with an Unmet Share of Cost Obligation</p> <p>6 = Eligible for a Health or Welfare Program other than Medi-Cal or CMSP services</p> <p>7 = Hold</p> <p>8 = QMB Eligible pending Medicare part A & B confirmation</p> <p>9 = Ineligible</p> <p>2nd Digit = Normal/Exception Eligibility</p> <p>0 = Normal Eligible</p> <p>1 = Unconfirmed Immediate Need eligible reported more than one month prior</p> <p>2 = Unconfirmed Immediate Need eligible reported 1 month prior</p> <p>3 = Unconfirmed Immediate Need eligible reported in current month</p> <p>4 = Forced eligible due to late termination</p> <p>5 = Partial Month Eligibility (Healthy Families, etc.)</p> <p>7 = Exception Eligible</p> <p>8 = Forced eligible from MEDS Hold</p> <p>9 = Full Month Eligibility (Healthy Families, etc.)</p> <p>3rd Digit = Timelines/Misc. Information</p> <p>1 = Regular eligible reported timely</p> <p>2 = Regular eligible reported retroactively</p> <p>3 = 3 month retroactive eligible</p> <p>4 = Continuing eligible reported timely</p> <p>5 = Continued eligible reported retroactively</p> <p>6 = Ramos/Pickle/IHSS/Other Extended eligible</p> <p>7 = Aid Paid Pending Ramos/Myers</p> <p>8 = Hold from LTC/SOC status</p> <p>9 = Ineligible or Regular Hold</p>	R
	MEDI-CAL COUNTY ID	MEDICALELGINFO/ PRIMARYCOUNTYID	STRING (14)	<p>Medi-Cal identified by IHSS established hierarchy.</p> <p>COUNTY (2)</p> <p>MEDI-CAL AID CODE (2)</p> <p>MEDI-CAL SERIAL (7)</p> <p>MEDI-CAL FBU (1)</p> <p>MEDI-CAL PERSON (2)</p> <p>or</p> <p>If Individual is SSI/SSP:</p> <p>COUNTY (2)</p> <p>AID CODE (2)</p> <p>"9" + SSN</p> <p>*** If this field is blank it indicates that the individual is NOT eligible for Medi-Cal.*** CMIPS will treat this record as ineligible record. Eligibility Status is set to '999'. FFP flag is set to 'N'.</p>	O
	SOC AMOUNT	MEDICALELGINFO/MEDICALSOC	NUMERIC (5)	99999 – Will be whole numbers only (could be spaces)	O
	PRIOR SOC AMOUNT	MEDICALELGINFO/ PRIORSOCAMOUNT	NUMERIC (5)	99999 – Whole number (could be spaces)O	O
	IHSS SOC AMOUNT	MEDICALELGINFO/ IHSSSOCAMOUNT	NUMERIC (5)	99999 – or spaces.	O

	PRIMARY IE/RR COUNTY ID	MEDICALELIGINFO /MEDSCOUNTYCODE AND MEDICALELIGINFO/ MEDICALAIDCODE AND MEDICALELIGINFO/SERIAL MEDICALELIGINFO /MEDICALCASENUMBER	STRING (14)	MEDS COUNTY (2) AID CODE (2) PRIMARY SERIAL (7) PRIMARY FBU (1) PRIMARY PERSON (2)	O
	FFP FLAG	MEDICALELIGINFO/ FFPIND	STRING(1)	Y or N If MEDS Aid Code is 10, 20 or 60, set FFP to Y, otherwise set as indicated in file	O
	CREATE DATE	N/A	N/A	N/A	N/A
	CREATE TIME	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	PENDING MC APPLICATION (APPLICATION FLAG)	MEDICALELIGINFO /APPLICATIONFLAG	STRING(1)	Values are: C = Consortia Conversion Transaction – not a new app D = CWD Annual Reevaluation, HF app referral E = CWD Other than annual reevaluation, HF app referral F = Fair Hearing Exception Referral (Retro Bridging) G = Pending app, general relief benefits, includes Medi-Cal N = Pending app, No Medi-Cal, No general relief O = Pending app, general relief benefits, No Medi-Cal P = Pending app, Includes Medi-Cal, No general relief B = Pending app, Includes Medi-Cal and Healthy Families (HF), from HF/SPE H = Pending app, Includes HF, from HF/SPE R = HF Annual Reevaluation, Medi-Cal app referral S = Pending app, includes Medi-Cal, for HF/SPE Z = Pending app, No Medi-Cal, No HF, from HF/SPE I = IEVS Inquiry only – not a new application M = Pending app, includes Medi-Cal, from MEB W = Pending CHDP Gateway application	O
	MEDI-CAL DENIAL DATE	MEDICALELIGINFO/ MEDICALDENIALDATE	DATE (CCYYMM DD-8)		O
	MEDI-CAL DENIAL REASON	MEDICALELIGINFO/ MEDICALDENIALREASONCODE	STRING(1)	Values are: A = Client Deceased B = Application Withdrawn C = Moved Out of State D = Loss of Contact/Unable to Locate Applicant E = Failure to Cooperate F = Does Not Meet CA Residency Requirements G = Excess Resources H = No Program Linkage I = Potential State Only Program Eligible did not apply for ongoing Medi-Cal (MEB only) J = No Deprivation K = Living in a Public Non-Medical Institution L = Existing AFDC/Medi-Cal/CMS Recipient M = Existing SSI/SSP Recipient N = Receiving Medicaid in Another State P = Duplicate Pending Application Q = IE/RR terminates accelerated enrollment (MEDS generated) R = Other S = Applicant can't apply for the person on the application Y = Erroneously reported application Z = No Valid Data Reported (MEDS generated) 1 = Premium Not Paid (HF only) 2 = Income Does Not Meet Requirements (HF only) 3 = Home Address State Missing or Invalid (HF only) 4 = End Date for Employer Sponsored Insurance Missing or Invalid (HF only) 5 = Child is Eligible for Medicare Part A and B (HF only) 6 = Funding Not Available (HF only) 7 = Child age 19 or over not eligible for HFP	O
	MEDI-CAL APPLICATION DATE	MEDICALELIGINFO /APPLICATIONDATE	DATE (CCYYMM DD-8)		O

	SSI LIVING ARRANGE MENT	MEDICALELGINFO /SSILIVINGARRANGECODE	STRING(1)	Values are: A = Own Household B = Another's Household C = Parent's Household (child cases only) D = Title XIX institution Blank = Individual is in a non-Title XIX institution or is outside the United States. Payment status is H10, N02, or N03. **Information may be out of date	O
	OPTIONAL LIVING ARRANGE MENT	MEDICALELGINFO/ OPTIONALLIVINGARRANGECODE	STRING(1)	Values are: A = Independent living with cooking facilities B = Out of Home Care C = Living in household of another E = Eligible Disabled Child to age 18 living in home of parent, guardian, or relative by marriage Z = Recipient not eligible or waives optional supplementation **Information may be out of date	O
	RV DUE MONTH	MEDICALELGINFO/ RVDUEMONTH	NUMERIC (2)	Values are: 01 – 12	O
	LAST RV COMPLET ED DATE	MEDICALELGINFO/ LASTRVCOMPLETEDDATE	DATE (CCYYMM-6)		O

	IDENTITY DOC TYPE	MEDICALELGINFO/ IDENTITYDOCTYPECODE	STRING(2)	<p>Values are:</p> <p>1A = United States Passport issued without limitation 1B = Certificate of Naturalization (Form N-550 or N-570) 1C = Certificate of Citizenship (Form N-560 or N-561)</p> <p>2A = United States passport issued with limitations 2B = Driver's license issued by U.S. State or Territory with a photograph or other identifying information such as name, age, sex, race, height, weight and eye color 2C = School identification card with a photograph 2D = U.S. military card or draft record 2E = Identification card issued by Federal, State, or local government with the same information as a driver's license (a photograph or other identifying information such as name, age, sex, race, height, weight and eye color) 2F = U.S. Military dependent's identification card 2G = Certificate of Degree of Indian Blood or other U.S. American Indian/Alaskan Native Tribal document with a photograph or other personal identifying information 2H = U.S. Coast Guard Merchant Mariner card 2Z = SSA confirmed U.S. Citizenship/Identity consistent with SSA data via the State Verification Exchange System (SVES)</p> <p>5A = Three corroborating identity documents 5B = Written Affidavit signed under penalty of perjury by a residential care facility director or administrator on behalf of a disabled individual institutionalized in the facility</p> <p>7A = School records including nursery or daycare records for a child under age 16 7B = Clinic, doctor or hospital record for a child under age 16 7W = Written Affidavit signed under penalty of perjury by a parent or guardian stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship) 7W = Written Affidavit signed under penalty of perjury by a parent, guardian or caretaker relative stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship, the child cannot obtain a school ID Card and the child does not have a driver's license) 7Z = Medi-Cal Application signed by a parent or guardian stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship)</p> <p>8B = Exempt from Verification – Confirmed Current SSI Eligible 8F = Exempt from Verification – Confirmed Medicare Entitlement 8G = Exempt from Verification – Confirmed receiving Title II Disability Benefits 8J = Exempt from Verification – Eligible under Foster Care or Adoption Assistance Program 8K = Exempt from Verification – Eligible under CalWORKs Cash Assistance Program 8P = Exempt from Verification – Eligible under Minor Consent Program 8Q = Exempt from Verification – Eligible under Deemed Infant Provision 8R = Exempt from Verification – Abandoned Baby Program eligible born in the U.S. 8S = Exempt from Verification – Confirmed Former SSI Eligible (No Longer SSI Eligible)</p> <p>9A = Unable to obtain identity documentation – Abandoned baby or child 9B = Unable to obtain identity documentation – Amnesia 9C = Unable to obtain identity documentation – Comatose client 9D = Unable to obtain identity documentation – Client otherwise incapacitated 9J = Unable to obtain identity documentation – County ended reasonable opportunity period due to client not making a good faith effort 9P = Unable to obtain identity documentation – Client says they cannot afford the cost to obtain an original document or written affidavit 9Q = Unable to obtain identity documentation – Client says they cannot locate an acceptable document and cannot get a written affidavit 9R = Unable to obtain identity documentation – Client requested end of reasonable opportunity period and did not provide any explanation or acceptable documentation 9R = Unable to obtain identity documentation - Client requested end of reasonable opportunity and did not provide any explanation or acceptable documentation 9S = SSN Verification removal also removed SSA Citizenship /Identity verification – alternate verification pending 9Z = New applicant who has not yet provided required identity documentation</p>	O
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	CITIZENSHIP IP DOC TYPE	MEDICALELGINFO/ CITIZENSHIPDOCTYPECODE	STRING(2)	Refer to the MEDSCitizensDocType Code Table.	O
	INS DATE OF ENTRY	MEDICALELGINFO/INSENTRYDATE	DATE (CCYYMM- 6)		O
	REFUGEE- ALIEN IND	MEDICALELGINFO /REFUGEALIENINDICATOR	STRING(1)	<p>A = Proven US citizen B = Alleged US citizen C = Conditional entrant admitted under INA section 203(a)(7) D = Deportation withheld admitted under INA section 243(h) or 241(b)(3) E = Amerasian refugee admitted under INA section 207 F = Refugee admitted under INA section 207 or 203(a)(7) – SDX G = Parolee admitted under INA section 212(d)(5) – SDX H = Silva vs. Levi alien – SDX K = Lawful Permanent Resident (LPR) L = Asylee admitted under INA section 208 but not Kurdish or Iraqi asylee M = Residents of Northern Mariana Islands – SDX N = Identity and citizenship of the individual verified by the Numident interface (code was previously A or B) – SDX P = Pre-Jan 1, 1972 alien (presumed lawfully admitted for permanent residence) – SDX Q = Alleged born in US, corroborated by a US birthplace shown on online Numident – SDX R = Other refugee admitted under INA section 207 but not Amerasian or Indochinese refugee S = Other aliens (not a temporary visa holder) T = Alleged PRUCOL U = Undocumented alien V = Visitor/Student/VISA and other aliens with temporary documentation W = Parolee admitted under INA section 212(d)(5) with a period of parole over one year X = Indochinese refugee admitted under INA section 207 Y = Parolee admitted under INA section 212(d)(5) with a period of parole less than one year Z = Kurdish or Iraqi asylee admitted under INA section 208 5 = Citizen child born to refugee parent(s) 8 = Cuban/Haitian entrant</p>	O
	DISABILITY ONSET DATE	MEDICALELGINFO /DISABILITYONSETDATE	DATE (CCYYMM- 6)		O

	SSN VER	MEDICALELGINFO/ SSNVERIFICATIONCODE	STRING(1)	<p>Values are:</p> <p>Valid User Input:</p> <p>R = Used on certain input transactions to indicate that the SSN verification code needs to be removed</p> <p>O = Used on certain input transactions to indicate that the SSN verification status was previously reported to MEDS</p> <p>1 = SSN reported by client, not sight verified, no SSA referral initiated</p> <p>2 = SSN application filed at SSA district office, confirmation received by reporting entity</p> <p>3 = SSN reported by client, sight verified by reporting entity</p> <p>5 = SSN reported by client, not sight verified, SSA referral initiated</p> <p>6 = Client does not have an SSN, SSA referral initiated</p> <p>8 = Client does not have an SSN and cannot get one - undocumented person</p> <p>9 = SSN not reported by client</p> <p>MEDS Assigned SSN Verification Codes:</p> <p>A = SSN verified via SSA NUMIDENT data match - SSA birthdate exactly matches MEDS</p> <p>B = SSN verified via SSA NUMIDENT data match - SSA birthdate exactly matches MEDS/Surname did not match</p> <p>C = SSN verified via SSA NUMIDENT data match - SSA birthdate does not exactly match MEDS</p> <p>D = SSN verified via SSA NUMIDENT data match - SSA birthdate does not exactly match MEDS/Surname did not match</p> <p>E = SSN verified via SSA NUMIDENT data match - SSA birthdate not available for exact MEDS match check</p> <p>F = SSN verified via SSA NUMIDENT data match - SSA birthdate not available for exact MEDS match check/Surname did not match</p> <p>H = SSN verified via Title II and Title XVI data match - failed SSA NUMIDENT data match</p> <p>I = SSN verified via Title II data match - failed SSA NUMIDENT data match</p> <p>J = SSN verified via Title XVI data match - failed SSA NUMIDENT data match</p> <p>K = SSN verified via Title II and/or Title XVI data match - SSN not recognized as an SSN issued by SSA in NUMIDENT data match</p> <p>L = Verification request pending for SSN reported as sight verified</p> <p>M = Verification request pending for SSN not reported as sight verified</p> <p>N = SSN verification failed SSA NUMIDENT data match on birthdate</p> <p>O = SSN verification failed SSA NUMIDENT data match on birthdate and failed Title XVI data match</p> <p>P = SSN verification failed SSA NUMIDENT data match on birthdate and failed Title II data match</p> <p>Q = SSN verification failed SSA NUMIDENT data match on birthdate and failed Title II and Title XVI data match</p> <p>S = SSN verification failed SSA NUMIDENT data match on surname or given name</p> <p>T = SSN verification failed SSA NUMIDENT data match on surname or given name and failed Title XVI data match</p> <p>U = SSN verification failed SSA NUMIDENT data match on surname or given name and failed Title II data match</p> <p>V = SSN verification failed SSA NUMIDENT data match on surname or given name and failed Title II and Title XVI data match</p> <p>W = SSN identified as verified via prior SSN verification process</p> <p>X = SSN identified as verified via prior SSN verification process but SSN verification code subsequently removed</p> <p>Y = SSN identified as unverified via prior SSN verification process</p> <p>% = SSN verification failed SSA NUMIDENT data match - probable transcription error identified</p> <p>& = SSN verification failed SSA NUMIDENT data match - SSN not recognized as an SSN issued by SSA * = SSN identified as verified via SVES SSN verification process but SSN verification code subsequently removed by worker</p> <p># = SSN identified as verified via SVES SSN verification process but SSN verification code removed by SSI/SSP update</p> <p>7 = No valid SSN verification status reported by entity reporting the SSN to MEDS</p> <p>! = SSN verification failed SSA NUMIDENT data match; given name missing</p>	O
	DEATH DATE	MEDICALELGINFO/ DEATHDATE	DATE (CCYYMM DD-8)		O

	DEATH CODE	MEDICALELIGINFO/ DEATHSOURCECODE	STRING(1)	Values are: <ul style="list-style-type: none"> • M = MEB Update Indicated Deceased • P = Pickle Status Update Indicated Deceased • R = Returned Beneficiary Identification Card (BIC) Marked Deceased • S = SDX Payment Status Code Indicates Deceased • V = Vital Statistics Indicates Deceased 	O
	HCP COUNTY	MEDICALELIGINFO/ HCPCOUNTYCODE	Numeric (2)	Look up to County Code Table for screen display for values 01 – 58. If value is other than 01 – 58 then write the numeric code value.	O
	HCP PLAN CODE	MEDICALELIGINFO/ HCPPLANCODE	String (3)	N/A	O
	HCP STATUS CODE	MEDICALELIGINFO/ HCPSTATUSCODE	String (2)	N/A	O

Transaction Trigger Events

N/A

Processing Criteria

Match is done based on CIN. If match is not found then record will be ignored.

Interface shall insert a trigger in SOCSPENDDOWNTRIGGER table for all eligible Recipients with uncertified MediCal Share of Cost.

Error Processing

When all the required fields are not present in interface file, record will be exceptioned out and written to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Refer to [DSD Section 25 - Business Rules](#) - No. 21, 67, and 267.

Tasks/Notifications

Refer to [Case Management Tasks/Notifications](#) - No. 34

Screens

Refer to [Alternative IDs](#).

Refer to [View Alternative ID](#).

Refer to [Medi-Cal Eligibility List](#).

Refer to [View Medi-Cal Eligibility](#).

Refer to [Share of Cost Details](#).

Reports

Refer to [Monthly Renewal Exception Report](#).

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHO/WPCS Paid Claims Interface – CMMS101B

CI	Document Name
 CI-116370 - DSD EINTF IHO WPCS Paid Claims Interface CMMS101B IMPLEMENTED	DSD_EINTF_IHO_WPCS_Paid_Claims_Interface_CMMS101B.doc

Internal Layout/System Mapping

Outbound

Source: Case Management			Target: Interface File		
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmms101b- CCYYMMDDHHMM SSnnn	N/A	CLAIM CONTROL NUMBER (CCN)	NUMERIC (13)	'1' in the left most position followed by the current date in Julian format for 5 bytes followed by an incremental number for 7 bytes	O
	WARRANT /COUNTYCODE, IHSSCASE/COUNTYCODE	COUNTY CODE	NUMERIC (2)	Values are: 01-58	O
	WARRANT /FUNDINGSOURCECODE IHSSAUTHORIZATION /FUNDINGAIDCODE	AID CODE	STRING(2)		O
	CONCERNROLE /PRIMARYALTERNATEID CONCERNROLEALTERNA TEID/ALTERNATEID CCINVOICERECONLINE /RECIPIENTSSN	SSN/MEDS ID /CIN	STRING(9)	Recipient SSN. If Alternative ID Type Social Security Number does not exist send Alternative ID Type Conversion Duplicate	O
	CONCERNROLE /PRIMARYALTERNATEID CONCERNROLEALTERNA TEID/ALTERNATEID CCINVOICERECONLINE /RECIPIENTSSN	SSN OR MEDS ID	STRING(9)	Recipient SSN If Alternative ID Type Social Security Number does not exist send Alternative ID Type Conversion Duplicate	O
	CONCERNROLEALTERNA TEID/ALTERNATEID	BENEFICIARY CIN	STRING(9)	Recipient CIN	O
	ALTERNATENAME /SURNAME CCINVOICERECONLINE/ RECIPIENTLASTNAME	RECIPIENT LAST NAME	STRING (28)		O
	ALTERNATENAME /FIRSTFORENAME CCINVOICERECONLINE/ RECIPIENTFIRSTNAME	RECIPIENT FIRST NAME	STRING (15)		O
	CASEHEADER /CASEREFERENCE	IHSS CASE NUMBER	STRING(7)		O
	PERSON/GENDER	SEX	STRING(1)	Values are: M = Male 1 = Male F = Female 2 = Female Blank = Unknown	O
	CONCERNROLEALTERNA TEID/ALTERNATEID	PROVIDER NUMBER	STRING (10)	Values are: IP = Provider SSN (9 bytes) HM = Homemaker Worker Number (4 bytes) CC = First 2 and last 4 of the County Contractor Number (6 bytes)	O

	IHSSCASE/COUNTYCODE	PROVIDER COUNTY NUMBER	STRING(2)	Values are: 01 – 58 = County Codes 99 = Out of State Provider	O
	N/A	SPECIAL PROGRAM TYPE	STRING(1)	Values are: 1 = IHSS State Plan (PCSP) 2 = IHSS Plus (1115 Waiver) 3 = IHO Personal Care Services (WPCS) Always sends value '3'	O
	WARRANT/ISSUEDATE	CHECK DATE	DATE (CCYYMM DD-8)	Values are: IP = Warrant Paid Date HM = HM Transaction Date CC = Invoice Summary Warrant Date	O
	WARRANTLINEITEM /AMOUNT WARRANTLINEITEM /LINEITEMTYPECODE	GROSS PAY	NUMERIC (10)	Last 2 STRING characters are decimal places (example: 999999.99 or 9999999.99).	O

Transaction Trigger Events

N/A

Processing Criteria

This interface sends IHO/WPCS Provider claims to the DHCS. All WPCS Provider Warrants issued or voided in the previous month in the system will be sent through this interface. Warrants which are issued and voided in the previous month are filtered/not sent through this interface.

Error Processing

When all the required fields are not present in CMIPS write the information to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Refer to Section 25.2.5 No 39.

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHO/WPCS Demographics Send Interface – CMMS101C

CI	Document Name
 CI-116369 - DSD EINTF IHO WPCS Demographics Send Interface CMMS101C IMPLEMENTED	DSD_EINTF_IHO_WPCS_Demographics_Send_Interface_CM MS101C.doc

Internal Layout/System Mapping

Outbound

Source: Case Management		Target: Interface File			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmms101c-CCYYMMDDHHMMSn	CASE NUMBER	CASEHEADER / CASEREference	NUMERIC(7)		R
	CIN	CONCERNROLEALTERNATEID / ALTERNATEID	STRING(9)		R
	RESPONSE		STRING(1)	Values are: U = Unknown to CMIPS D = Known to CMIPS – Recipient Demographics Only P = Known to CMIPS – Recipient Demographics and WPCS Provider Data	R
	RECIPIENT LAST NAME	ALTERNATENAME / SURNAME	STRING(30)		O
	RECIPIENT FIRST NAME	ALTERNATENAME / FIRSTFORENAME	STRING(25)		O
	RECIPIENT DOB	PERSON / DATEOFBIRTH	DATE		O
	RECIPIENT GENDER	PERSON / GENDER	STRING(10)		O
	RECIPIENT ADDRESS	ADDRESS / ADDRESSDATA	VARSTRIN G(2048)		O
	RECIPIENT CASE STATUS	CASESTATUS / STATUSCODE	STRING(10)		O
	RECIPIENT ELIGIBILITY BEGIN DATE	CASESTATUS / STARTDATE	DATE		O
	RECIPIENT ELIGIBILITY END DATE	CASESTATUS / ENDDATE	DATE		O
	RECIPIENT AUTHORIZED IHSS HOURS	IHSSAUTHORIZATION / AUTHTOPURCHASEMIN	INTEGER		O
	RECIPIENT AUTHORIZED WPCS HOURS	CASEWPCSHOURS / WPCSHOURSMIN	INTEGER		O
	WPCS PROVIDER 1 LAST NAME	ALTERNATENAME / SURNAME	STRING(30)		O
	WPCS PROVIDER 1 FIRST NAME	ALTERNATENAME / FIRSTFORENAME	STRING(25)		O
	WPCS PROVIDER 1 DOB	PERSON / DATEOFBIRTH	DATE		O
	WPCS PROVIDER 1 GENDER	PERSON / GENDER	STRING(10)		O

	WPCS PROVIDER 1 ADDRESS	ADDRESS / ADDRESSDATA	VARSTRIN G(2048)		O
	WPCS PROVIDER 1 RELATIONSHIP TO RECIPIENT	PROVIDERRELATIONSHIP / PROVIDERRELATIONSHIPCODE	STRING (10)		O
	WPCS PROVIDER 2 LAST NAME	ALTERNATENAME / SURNAME	STRING (30)		O
	WPCS PROVIDER 2 FIRST NAME	ALTERNATENAME / FIRSTFORENAME	STRING (25)		O
	WPCS PROVIDER 2 DOB	PERSON / DATEOFBIRTH	DATE		O
	WPCS PROVIDER 2 GENDER	PERSON / GENDER	STRING (10)		O
	WPCS PROVIDER 2 ADDRESS	ADDRESS / ADDRESSDATA	VARSTRIN G(2048)		O
	WPCS PROVIDER 2 RELATIONSHIP TO RECIPIENT	PROVIDERRELATIONSHIP / PROVIDERRELATIONSHIPCODE	STRING (10)		O
	WPCS PROVIDER 3 LAST NAME	ALTERNATENAME / SURNAME	STRING (30)		O
	WPCS PROVIDER 3 FIRST NAME	ALTERNATENAME / FIRSTFORENAME	STRING (25)		O
	WPCS PROVIDER 3 DOB	PERSON / DATEOFBIRTH	DATE		O
	WPCS PROVIDER 3 GENDER	PERSON / GENDER	STRING (10)		O
	WPCS PROVIDER 3 ADDRESS	ADDRESS / ADDRESSDATA	VARSTRIN G(2048)		O
	WPCS PROVIDER 3 RELATIONSHIP TO RECIPIENT	PROVIDERRELATIONSHIP / PROVIDERRELATIONSHIPCODE	STRING (10)		O
	WPCS PROVIDER 4 LAST NAME	ALTERNATENAME / SURNAME	STRING (30)		O
	WPCS PROVIDER 4 FIRST NAME	ALTERNATENAME / FIRSTFORENAME	STRING (25)		O
	WPCS PROVIDER 4 DOB	PERSON / DATEOFBIRTH	DATE		O
	WPCS PROVIDER 4 GENDER	PERSON / GENDER	STRING (10)		O
	WPCS PROVIDER 4 ADDRESS	ADDRESS / ADDRESSDATA	VARSTRIN G(2048)		O
	WPCS PROVIDER 4 RELATIONSHIP TO RECIPIENT	PROVIDERRELATIONSHIP / PROVIDERRELATIONSHIPCODE	STRING (10)		O
	WPCS PROVIDER 5 LAST NAME	ALTERNATENAME / SURNAME	STRING (30)		O
	WPCS PROVIDER 5 FIRST NAME	ALTERNATENAME / FIRSTFORENAME	STRING (25)		O
	WPCS PROVIDER 5 DOB	PERSON / DATEOFBIRTH	DATE		O
	WPCS PROVIDER 5 GENDER	PERSON / GENDER	STRING (10)		O
	WPCS PROVIDER 5 ADDRESS	ADDRESS / ADDRESSDATA	VARSTRIN G(2048)		O
	WPCS PROVIDER 5 RELATIONSHIP TO RECIPIENT	PROVIDERRELATIONSHIP / PROVIDERRELATIONSHIPCODE	STRING (10)		O

Transaction Trigger Events

Each month In-Home Operations (IHO) will provide a file (CMMR101A) containing Client Index Numbers (CINs) for IHO Recipients and wait-listed clients. CMIPS will compare this list with Recipients known to CMIPS and will provide a return file (CMMS101C).

Processing Criteria

Matching is based on the following criterion:

CIN

Error Processing

When all the required fields are not present in CMIPS write the information to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Medi-Cal Quarterly Reconciliation Send Interface – CMQS1XXF

CI	Document Name
 CI-116377 - DSD EINTF Medi-Cal Quarterly Reconciliation Send Interface CMQS1XXF IMPLEMENTED	DSD_EINTF_MediCal_Quarterly_Reconciliation_Send_Interface_CMQS1XXF.doc

Internal Layout/System Mapping

Outbound/RI20 Transaction:

Source: Case Management		Target: Interface File			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmqs1xxf	N/A	TRANSACTION-CODE	STRING(4)	Value is: RI20	O
	N/A	SOURCE-SYSTEM-ID	STRING(4)	Each county/consortia is assigned a unique source-system-id for identification purposes.	O
	N/A	FORMAT-INDICATOR	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	CREATION-DATE	DATE (CCYYMMDD) DD-8)	This date (CCYYMMDD) is used by MEDS for sequencing transactions	O
	N/A	CREATION-TIME	DATE (HHMMSS TT-8)	This NUMERIC field is used for sequencing transactions and may be a time stamp in the format HHMMSSTT, a sequence number, or any other NUMERIC value that is unique for the creation date, to enable transactions that are created on the same date to be processed in a particular order.	O
	N/A	BATCH-NUMBER	NUMERIC (3)	This element identifies a record as being from the NNNth (i.e., 001-999) batch update file submitted by a county for the year. All records on a given update file must have the same sequence number. The county increments this number by one each time an update file is created. A gap in numbering alerts the MEDS Control Unit that a file is missing.	O
	N/A	FILLER	N/A	N/A	N/A
	CONCERNROLEALTERNA TEID/ALTERNATEID	MEDS ID	STRING(9)	May be blank if client has no SSN	O
	N/A	BLANK	N/A	N/A	N/A
	CONCERNROLEALTERNA TEID/ALTERNATEID	CIN	STRING(9)		R
	MEDICALELGINFO /CINCHECKDIGIT	CIN-CHECK-DIGIT	STRING(1)	Required when CIN is present.	R
	N/A	COUNTY ID	STRING (14)		R
	IHSSCASE/COUNTYCODE	COUNTY	NUMERIC (2)	Values are: 01-58	R
	IHSSAUTHORIZATION /FUNDINGAIDCODE	AID-CODE	STRING(2)		R

	CONCERNROLEALTERNA TEID/ALTERNATEID	SERIAL	STRING (10)	Value = "9" + CIN	R
	PERSON/DATEOFBIRTH	BIRTHDA TE	DATE (CCYYMM DD-8)		R
	N/A	BLANK	N/A	N/A	N/A
	N/A	FILLER	N/A	N/A	N/A
	N/A	Variable- Data- Length	N/A	N/A	N/A
	N/A	Variable Portion of Transaction	N/A	N/A	N/A
	CURRENT DATE	EFFECTIV E-DATE	DATE (CCYYMM DD-8)		R
	IHSSASSESSMENTVIDE NCE /ASSESSMENTTYPECODE	ESAC	STRING(1)	CMIPS Allowed Values are: Continuing Eligibility Periods 1 = New Eligible 2 = Active Client Eligible Update Closed Eligibility Periods 6 = New Eligible 7 = Active Client Eligible Update	R
	ALTERNATENAME /FIRSTFORENAME	RECIPIEN T-NAME: FIRST NAME	STRING (15)	Individuals with a single name will be populated in the Last Name field. First Name field will need to be populated with a value of '#'. 	R
	ALTERNATENAME /OTHERFORENAME	RECIPIEN T-NAME: INITIAL	STRING(1)	Space must be sent if there is no middle initial.	O
	ALTERNATENAME /SURNAME	RECIPIEN T-NAME: LAST NAME	STRING (20)		R
	IHSSASSESSMENTVIDE NCE /REASSESSMENTDUEDATE	REDETER M-MONTH	DATE(MM- 2)	Month the next re-assessment is due	R
	PERSON/GENDER	SEX	STRING(1)	Values are: F = Female M = Male	R
	IHSSCASE /APPLICATIONDATE	APPLICAT ION-DATE	DATE (CCYYMM DD-8)		O
	N/A	AUTHORI ZED- REP: ADDRESS FLAG	STRING(1)	CMIPS will not send this data element.	O
	ALTERNATENAME /NAMESUFFIX	AUTHORI ZED- REP: APPELLA TION	STRING(3)		O
	ADDRESS/ADDRESSDATA	AUTHORI ZED- REP: C/O- LINE	STRING (38)		O
	ADDRESS/ADDRESSDATA	AUTHORI ZED- REP: CITY	STRING (20)		O
	ALTERNATENAME /FIRSTFORNAME	AUTHORI ZED- REP: FIRST NAME	STRING (15)	Individuals with a single name will be populated in the Last Name field. First Name field will need to be populated with a value of '#'. 	O

	ALTERNATENAME /OTHERFORENAME	AUTHORIZER-REP: INITIAL	STRING(1)		O
	ALTERNATENAME /SURNAME	AUTHORIZER-REP: LAST NAME	STRING(20)		O
	ADDRESS/ADDRESSDATA	AUTHORIZER-REP: STATE	STRING(2)		O
	ADDRESS/ADDRESSDATA	AUTHORIZER-REP: STREET-ADDRESS	STRING(50)		O
	ADDRESS/ADDRESSDATA	AUTHORIZER-REP: ZIP CODE	NUMERIC(5)		O
	ADDRESS/ADDRESSDATA	AUTHORIZER-REP: ZIP+4	NUMERIC(4)		O
	ALTERNATENAME /FULLNAME	CASE-NAME	STRING(18)		O
	LOCATION /LOCATIONNUMBER	DISTRICT	STRING(3)	District Office	O
	CASEDECISION /DECISIONDATE	ELIG-APPROVAL-DATE	DATE(CCYYMM DD-8)		O
	PERSON /ETHNICORIGINCODE	ETHNIC	STRING(1)	<p>CMIPS Allowed Values are:</p> <p>1 = White 2 = Hispanic 3 = Black 4 = Asian or Pacific Islander 5 = Alaskan Native or American Indian 7 = Filipino 8 = No valid data reported (MEDS generated) 9 = No response, client declined to state</p> <p>A = Amerasian C = Chinese H = Cambodian J = Japanese K = Korean M = Samoan N = Asian Indian P = Hawaiian R = Guamanian T = Laotian V = Vietnamese Z = Other</p>	O
	USERS/WORKERNUMBER	EW-CODE	STRING(4)	IHSS SW Code	O

	CONCERNROLE /PREFERREDLANGUAGE	LANGUAGE, SPOKEN	STRING(1)	<p>CMIPS Allowed Values are:</p> <p>0 = American Sign Language 1 = Spanish 2 = Cantonese 3 = Japanese 4 = Korean 5 = Tagalog 6 = Other Non-English 7 = English 9 = No Response, client declined to state</p> <p>A = Other Sign Language B = Mandarin C = Other Chinese Languages D = Cambodian E = Armenian F = Ilocano G = Mein H = Hmong I = Lao J = Turkish K = Hebrew L = French M = Polish N = Russian P = Portuguese Q = Italian R = Arabic S = Samoan T = Thai U = Farsi V = Vietnamese W = Hindi X = Punjabi Y = Ukrainian</p>	O
	CONCERNROLE /PREFERREDSECONDLANGUAGE	LANGUAGE, WRITTEN	STRING(1)	<p>CMIPS Allowed Values are:</p> <p>1 = Spanish 2 = Cantonese 3 = Japanese 4 = Korean 5 = Tagalog 6 = Other Non-English 7 = English 9 = No Response, client declined to state</p> <p>B = Mandarin C = Other Chinese Languages D = Cambodian E = Armenian F = Ilocano G = Mein H = Hmong I = Lao J = Turkish K = Hebrew L = French M = Polish N = Russian P = Portuguese Q = Italian R = Arabic S = Samoan T = Thai U = Farsi V = Vietnamese W = Hindi X = Punjabi Y = Ukrainian</p>	O
	N/A	MAILING-ADDRESS : ADDRESS FLAG	N/A	CMIPS will not send this data element.	N/A
	ADDRESS/ADDRESSDATA	MAILING-ADDRESS : C/O-LINE	STRING (38)		O
	ADDRESS/ADDRESSDATA	MAILING-ADDRESS : CITY	STRING (20)		O

	ADDRESS/ADDRESSDATA	MAILING-ADDRESS : STATE	STRING(2)		O
	ADDRESS/ADDRESSDATA	MAILING-ADDRESS : STREET-ADDRESS	STRING (50)		O
	ADDRESS/ADDRESSDATA	MAILING-ADDRESS : ZIP CODE	NUMERIC (5)		O
	ADDRESS/ADDRESSDATA	MAILING-ADDRESS : ZIP+4	NUMERIC (4)		O
	CONCERNROLEPHONENUMBER /PHONEAREACODE AND CONCERNROLEPHONENUMBER/PHONENUMBER	PHONE:	NUMERIC (10)		O
	ALTERNATENAME /NAMESUFFIX	RECIPIENT-NAME: APPENDATION	STRING(3)		O
	CASEDECISION. DECISIONDATE	REDETERM-DATE	DATE (CCYYMM-6)		O
	N/A	RESIDENCE ADDRESS : ADDRESS FLAG	N/A	CMIPS will not send this data element.	N/A
	ADDRESS/ADDRESSDATA	RESIDENCE ADDRESS : C/O-LINE	STRING (38)		O
	ADDRESS/ADDRESSDATA	RESIDENCE ADDRESS : CITY	STRING (20)		O
	ADDRESS/ADDRESSDATA	RESIDENCE ADDRESS : STATE	STRING(2)		O
	ADDRESS/ADDRESSDATA	RESIDENCE ADDRESS : STREET-ADDRESS	STRING (50)		O
	ADDRESS/ADDRESSDATA	RESIDENCE ADDRESS : ZIP CODE	NUMERIC (5)		O
	ADDRESS/ADDRESSDATA	RESIDENCE ADDRESS : ZIP+4	NUMERIC (4)		O
	N/A	RESIDENCE COUNTY	NUMERIC (2)	Data Element sent only if the address cannot be recognized by Finalist (example: Rural Route, Highway, etc.) Value = 01-58	O
	SHAREOFCOSTEVIDENCE /IHSSSHAREOFCOSTAMT	SOC-AMOUNT	NUMERIC (5)	IHSS SOC Amount	O
	N/A	TERM-DATE	DATE (CCYYMM DD-8)	If the 2L, 2M, 2N changes from one month to another, then send the TERM DATE for the month	O
	N/A	TERM-REAS	N/A	N/A	N/A

Transaction Trigger Events

N/A

Processing Criteria

The batch job extracts all the eligible, presumptive eligible and leave cases for reconciliation with MEDS.

Error Processing

When all the required fields are not present in CMIPS, write the information to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Refer to Section 25.2.5 No 24.

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Meds Alert Receive - CMDR103A

CI	Document Name
CI-116380 - DSD EINTF Meds Alert Receive CMDR103A IMPLEMENTED	DSD_EINTF_Meds_Alert_Receive_CMDR103A.doc

Internal Layout/System Mapping

Source: Interface File		Target: RD_MEDS_ALERT Data Base Table/Reporting Database			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
	TRANSACTION-CODE	TRANSACTION_CODE	CHAR(4)		R
	SOURCE-SYSTEM-ID	SOURCE_SYSTEM_ID	CHAR(4)		R
	FORMAT-INDICATOR	N/A	N/A	N/A	
	PRINTER ID	N/A	N/A	N/A	
	TERMINAL ID	N/A	N/A	N/A	
	OPERATOR ID	N/A	N/A	N/A	
	CREATION-DATE	CREATION_DATE	DATE(10)		R
	CREATION-TIME	CREATION_TIME	TIMESTAMP (26)	N/A	N/A
	BATCH-NUMBER	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	MEDS-ID	MEDS_ID	Char(9)	N/A	R
	MEDS-ID-CHECK-DIGIT	MEDS_ID_CHECK_DIGIT	CHAR(1)	N/A	R
	CLIENT-INDEX-NUMBER (CIN)	CLIENT_INDEX_NUMBER	CHAR(9)	N/A	R
	CIN-CHECK-DIGIT	CIN_CHECK_DIGIT	CHAR(1)	N/A	N/A
	COUNTY ID	COUNTY_ID	CHAR(14)	N/A	N/A
		COUNTY	CHAR(2)	Substring of COUNTY_ID (0,2)	
	N/A	AID_CODE	CHAR(2)	Substring of COUNTY_ID (2,4)	
	N/A	SERIAL	CHAR(2)	Substring of COUNTY_ID (4,11)	
	N/A	FAMILY_BUDGET_UNIT	CHAR(1)	Substring of COUNTY_ID (11,12)	
	N/A	PERSON_NUMBER	CHAR(2)	Substring of COUNTY_ID (12,14)	
	N/A				
	BIRTHDATE	BIRTHDATE	DATE(10)	N/A	R
	CUSTOMER KEY	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	DESTINATION CODE	N/A	N/A	N/A	N/A
	DESTINATION SUB-ROUTE CODE	N/A	N/A	N/A	N/A
	REPORT TYPE	N/A	N/A	N/A	N/A
	SEGMENT INDICATOR	N/A	N/A	N/A	N/A
	MEDS ID	N/A	N/A	N/A	O

	RECIPIENT NAME: LAST	RECIP_LAST_NM	CHAR(20)	N/A	O
	RECIPIENT NAME: FIRST	RECIP_FIRST_NM	CHAR(15)	N/A	O
	COUNTY ID	WORKER_ALERT_COU NTY_ID	CHAR(14)	N/A	O
	EW CODE	EW_CODE	CHAR(4)	N/A	N/A
	CASE NAME	CASE_NAME	CHAR(18)	N/A	N/A
	DISTRICT CODE	DISTRICT_CODE	CHAR(3)	N/A	N/A
	HCP PLAN CODE	N/A	N/A	N/A	N/A
	EFFECTIVE DATE	N/A	N/A	N/A	N/A
	TERM DT	TERM_DT	DATE(10)	N/A	N/A
	ESAC	N/A	N/A	N/A	N/A
	EXCEPTION ELIGIBLE REPORT CATEGORY	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	ALERT SOURCE	ALERT_SOURCE	CHAR(2)	N/A	N/A
	ALERT INTERNAL NUMBER	ALERT_INTERNAL_NU MBER	CHAR(4)	N/A	N/A
	ALERT TYPE	ALERT_TYPE	CHAR(1)	N/A	N/A
	DATA ELEMENT NUMBER	N/A	N/A	N/A	N/A
	DATA SOURCE	N/A	N/A	N/A	N/A
	ALERT EXTERNAL NUMBER	ALERT_EXTERNAL_NU MBER	CHAR(4)	N/A	O
	FILLER	N/A	N/A	N/A	O
	ALERT MESSAGE TEXT	ALERT_MESSAGE_TEXT	CHAR(58)	N/A	O
	FILLER	N/A	N/A	N/A	N/A
	ALERT ACTION	ALERT_ACTION	CHAR(8)	N/A	O
	FILLER	N/A	N/A	N/A	N/A

Transaction Trigger Events

N/A

Processing Criteria

Although this interface does not pass through Case Management it is being referenced here to tie the interface to its corresponding report. For specifics on the processing of this interface please reference the IDD.

Error Processing

When all the required fields are not present in the MEDS Alert file, write the information to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

N/A

Reports

Refer to Section 28.23.

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Centralized Print Solution Interface CMNS997A

CI	Document Name
 CI-445482 - DSD EINTF Centralized Print Solution Interface CMNS997A IMPLEMENTED	DSD_EINTF_Centralized_Print_Solution_Interface_CMNS997A.doc

Internal Layout/System Mapping

Not Applicable as this is a Print job.

Transaction Trigger Events

N/A

Processing Criteria

N/A

Error Processing

N/A

Related Components

N/A

Business Process Functions

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/AADE899A – CMIPS NOA to ISO

CI	Document Name
 CI-497803 - DSD EINTF CMIPS NOA to ISO AADE899A CANCELLED	DSD EINTF CMIPS NOA to ISO AADE899A

Cancelled by CR26.

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/AADS875A – ISO to SPS

CI	Document Name
 CI-497802 - DSD EINTF CMIPS ISO to SPS AADS875A CANCELLED	DSD EINTF CMIPS ISO to SPS AADS875A

Cancelled by CR26.

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/AADR875B – SPS ISO Processing Complete

CI	Document Name
 CI-497804 - DSD EINTF SPS ISO Processing AADR875B CANCELLED	DSD_EINTF_SPS_ISO_Processing_AADR875B.doc

Cancelled by CR26.

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMDS876A – CMIPS PDF to BVI Format and Manifest

CI	Document Name
CI-500960 - DSD EINTF IHSS PDF to BVI Format CMDS876A IMPLEMENTED	DSD_EINTF_IHSS_PDF_to_BVI_Format_CMDS876A.docx

Internal Layout/System Mapping – IHSS NOA and Required Forms PDF Listing

Source: Case Management			Target: Braille Works		
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
BRAILLE MANIFEST XML	N/A	<?xml version="1.0"? encoding="UTF-8"?><ihsppdfBraille>	N/A	IHSS Braille, Audio, and Textual NOA and Required forms PDF Send File Header/Begin File	R
IHSS PDF TRANSACTION	N/A	<ihsppdfData>	N/A	Begin transaction	R
BVINOABRAILLETRIGGER	bviNOAIdentifier	<ihsppdfIdentifier></ihsppdfIdentifier>	CHARACTER (18-20)	Random generated unique sequence number. Example: "117687020160602610"	R
BVINOABRAILLETRIGGER	bviBrailleFileName	<filename>	CHARACTER (32 – 45)	PDF File Name Example: "cmd876a1176870SOC22722016060601_1.pdf"	R
TECHNICAL NAME(8)	N/A	N/A	N/A	Value = "cmd876a"	N/A
CASE or PROVIDER NUMBER	N/A	N/A	CHARACTER(7-10)	Examples: "1234567" "123456789"	N/A
TEMPLATE TYPE(3 - 9)	N/A	N/A	CHARACTER(3 – 9)	Values are: <ul style="list-style-type: none">• SOCXXXXX• DHCSXXXX• CDSS• APPROVAL (8)• DENIAL (6)• CHANGE (6)• MULTI (5)• SOC (3)• TERM (4) Examples: "SOC2272" "SOC2266A" "DHCS2257" "DHCS2266A" "DHCS" "CDSS" "APPROVAL"	N/A
NOA CREATE DATE(8)	N/A	N/A	CCYYMMDD(8)	Date IHSS PDF request created by user Example: "20150315"	N/A
SEQUENCE NUMBER (2)	N/A	N/A	CHARACTER(5)	CMIPS II generated sequence number unique to the generated PDF file Example: "01_1"	N/A
EXTENSION(4)	N/A	</filename>	EXTENSION (4)	Value = ".pdf"	N/A

BVI FORMAT	N/A	<bviFormat> </bviFormat>	CHARACTER (10)	Values are: • LARGEFONT (8) • AUDIOCD (7) • DATAACD (6) • BRAILLE (7)	R
LANGUAGE	N/A	<language> </language>	CHARACTER (1)	Values are: • 7 (English) • 1 (Spanish) • B (Chinese) • E (Armenian)	R
CONCERNROLECOMMUNICATION	CORESPONDENT NAME	<recipientName> </recipientName>	CHARACTER	<FIRST NAME MIDDLE INITIAL LAST NAME> Example: "Jane R. Doe"	R
CONCERNROLECOMMUNICATION	ADDRESSID LINE 1	<addressLine1> </addressLine1>	CHARACTER	Example: "C/O Joe Provider" or "123 West Main Street" or "123 West Main Street STE 100A"	R
CONCERNROLECOMMUNICATION	ADDRESSID LINE 2	<addressLine2> </addressLine2>	CHARACTER	Example: "123 West Main Street"	O
CONCERNROLECOMMUNICATION	ADDRESSID LINE 3	<addressLine3> </addressLine3>	CHARACTER	Example: "Suite 100A"	O
CONCERNROLECOMMUNICATION	ADDRESSID MAILING CITY	<addressCity> </addressCity>	CHARACTER	Example: "Any town"	R
CONCERNROLECOMMUNICATION	ADDRESSID MAILING STATE	<addressState> </addressState>	CHARACTER	Example: "CA"	R
CONCERNROLECOMMUNICATION	ADDRESSID MAILING ZIP + (4)	<addressZip> </addressZip>	CHARACTER	Example: "12345" or "12345-6789"	R
CASECOUNTY	COUNTY NAME	<returnCounty> </returnCounty>	CHARACTER	County Address Name Example: "SAN BERNARDINO COUNTY"	R
CASECOUNTY	COUNTY ADDRESS LINE 1	<returnAddressLine1> </returnAddressLine1>	CHARACTER	County Mailing Address Line 1 Example: "686 MILL ST."	R
CASE COUNTY	COUNTY ADDRESS LINE 2	<returnAddressLine2> </returnAddressLine2>	CHARACTER	County Mailing Address Line 2 Example: "SAN BERNARDINO, CA 92415"	R
END NOA TRANSACTION	N/A	</ihsspdfData>	N/A	End transaction – repeat transactions as needed	R
TOTAL PDF COUNT	N/A	<pdfCount> </pdfCount>	NUMERIC	Total Number of PDF to be delivered. If no PDF then Value = 0 This schema is not repeated.	R
END BRAILLE MANIFEST	N/A	</ihsspdfBraille>	N/A		R

Internal Layout/System Mapping – IHSS Required Forms PDF File

Source: Case Management		Target: Braille Works				
Table Name/ File Name /WSDL Name	Field Name	Field Name		Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)

IHSS REQUIRED FORMS PDF GENERATION	N/A	<p>File generated is a PDF of the following IHSS Required forms Documents</p> <ul style="list-style-type: none"> • SOC 2266 – Notice to Recipient Approval of Exception to Exceed Weekly Hours • SOC 2267 – Notice to Recipient Denial of Exception to Exceed Weekly Hours • SOC 2268 – Notice to Recipient Approval for Provider to Worker Alternate Schedule Due to Recurring Event • SOC 2269 – Notice to Recipient Cancellation of Alternate Schedule Due to Recurring Event • SOC 2270 – Notice to Recipient Failure to Complete Workweek Agreement (SOC 2256) • SOC 2257A – Notice to Recipient of First/Second Violation for Exceeding Workweek and/or Travel Time Limits • SOC 2271A – In-Home Supportive Services Program Notice to Recipient of Maximum Weekly Hours • SOC 2258A – IHSS Program Notice to Recipient of Providers Third Overtime Violation • SOC 2259A – IHSS Program Notice to Recipient of Providers Fourth Violation and Termination • SOC 2264 – IHSS Program Notice to Recipient Rescinding Provider Violation • DHCS 2264 – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient Rescinding Provider Violation • DHCS 2266 – Waiver Personal Care Services Program Notice to Recipient Approval of Exception to Exceed Weekly Hours • DHCS 2267 – Waiver Personal Care Services Program Notice to Recipient Denial of Exception to Exceed Weekly Hours • DHCS 2268 – Waiver Personal Care Services Program Notice to Recipient Approval to Work Alternate Schedule Due to Recurring Event • DHCS 2269 – Waiver Personal Care Services Program Notice to Recipient Cancellation of Alternate Schedule Due to Recurring Event • DHCS 2270 – Waiver Personal Care Services Program Notice to Recipient /Provider Failure to Complete Participant (Recipient) Assignment of Authorized Hours Agreement (DHCS 2256W) • DHCS 2289 – State Administrative Review Request Response to Recipient Letter Rescinding Third or Fourth Violation • SOC 2281 – In-Home Supportive Services Program Notice to Recipient Upholding Provider's First or Second Violation for Exceeding Workweek and/or Travel Time Limits • SOC 2287 – In-Home Supportive Services Program State Administrative Review Request Response Letter to Recipient Upholding Provider's Third Violation (90-Day Suspension of Eligibility) for Exceeding Workweek and/or Travel Time Limits • SOC 2289 – In-Home Supportive Services Program State Administrative Review Request Response Letter to Recipient Rescinding Provider's Third or Fourth Violation for Exceeding Workweek and/or Travel Time Limits • SOC 2291 – In-Home Supportive Services Program State Administrative Review Request Response Letter to Recipient Upholding Fourth Violation (One-Year Period of Ineligibility) • DHCS 2257A – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient of Provider's First/Second Violation for Exceeding Workweek and/or Travel Time Limits • DHCS 2258A – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient of Provider's Third Violation (90-Day Suspension of Eligibility) for Exceeding Workweek and/or Travel Time Limits • DHCS 2259A – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient of Provider's Fourth Violation (One-Year Period of Ineligibility) for Exceeding Workweek and/or Travel Time Limits • DHCS 2281 – In-Home Supportive Services (IHSS) and Waiver Personal Care Services (WPCS) Notice to Recipient Upholding First/Second Violation for Exceeding Workweek and/or Travel Time Limits • DHCS 2287 – State Administrative Review Request Response to Recipient Letter Upholding Provider's Third Violation and 90 Day Period of Ineligibility • DHCS 2291 – State Administrative Review Request Response to Recipient Letter Upholding Provider's Fourth Violation and One-Year Period of Ineligibility • SOC 2301 – IHSS or WPCS Recipient Confirmation of Enrollment in ETS or TTS 	VARIABLE	<p>File name for each PDF:</p> <p>Example: "cmds876a1234567 SOCXXXXXXYM MDDXX.PDF"</p>	R
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Trigger Events

For IHSS Required forms, the BVI IHSS Required forms Option of, 'Large Font Document', 'Audio CD', 'Data CD' or 'Braille Document' has been indicated and a standard PDF form has been produced.

For IHSS NOAs, the BVI Notice of Action Option of 'Audio CD', 'Data CD' or 'Braille Document' has been indicated and a standard PDF NOA has been produced, or Regenerate BVI on the Modify and Inactivate Form screen has been indicated.

Processing Criteria

If no PDFs are generated for this interface on a processing day the xml manifest listing with TOTAL PDF COUNT Value = "0" will still be sent to BPM for delivery.

Error Processing

When transaction is sent by Case Management and logging is enabled, transaction data is logged in the Case Management log file.

Related Components

Business Process Functions

Refer to DSD Section 25A.2.1.19 IHSS Required Forms – BVI Format Generation and Delivery

Business Flows

N/A

Business Rules

Refer to DSD Section 22.1.8 Business Rules #101, #102, and #103

Refer to DSD Section 23.6 Business Rules #163, #164, #165, #166

Refer to DSD Section 25A.2.8 Business Rules #117, #150, #154, #156, #219, #220, #221, and #222

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMDR876B – IHSS PDF to BVI Format Status

CI	Document Name
 CI-500959 - DSD EINTF IHSS PDF to BVI Format Status CMDR876B IMPLEMENTED	DSD_EINTF_IHSS_PDF_to_BVI_Format_Status_CMDR876B.doc

Internal Layout/System Mapping – IHSS Required Forms to BVI Format Status

Source: Braille NOA Service Provider			Target: Case Management		
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmdr876b.xml <?xml version="1.0"?> encoding="UTF-8"?> <brailleihsspdfStatus>	N/A	N/A	N/A	IHSS PDF Status File Header /Begin File	N/A
<statusDetail>	N/A	N/A	N/A	Begin transaction	N/A
<ihsspdfIdentifier> </ihsspdfIdentifier>	N/A	BVINOABRAILLETRIGGER.bviNOAIdentifier	CHARACTER (18-20)	Random generated unique sequence number. Example: "117687020160602610"	Match
<status> </status>	N/A	IF R THEN BVINOABRAILLETRIGGER. bviNOAStatus OR IF M THEN BVINOABRAILLETRIGGER.bviNOAStatus AND CONCERNROLECOMMUNICATION.status	CHARACTER (1)	Values are: R = Received M = Mailed	R
<statusDate> </statusDate>	N/A	IF R THEN BVINOABRAILLETRIGGER. bviBrailleFileReceiveDate OR IF M THEN BVINOABRAILLETRIGGER. bviBrailleFileMailingDate AND CCONCERNROLECOMMUNICATION. statusDate	CCYYMMDD	Example: 20150317 Status= R – PDF Receive Date Status = M – IHSS PDF Mailed Date	R
</statusDetail>	N/A	N/A	N/A	End transaction – repeat transactions as needed	R
<recordCount> </recordCount>	N/A	cmdr876b Batch Log	NUMERIC	Total Number of status records to be delivered. If no status records then Value = 0 This schema is not repeated.	R
</brailleihsspdfStatus>	N/A	N/A	N/A	End File	N/A

Trigger Events

Batch job

Processing Criteria

1. IF no file found on ProcServer in "/ProcServer/cmips2/interface/<env>/<date>/cmdr876b" THEN job status = Failed
2. If no transactions exist for this interface on a processing day the status xml with TOTAL RECORD COUNT Value = "0" will still be sent. IF TOTAL RECORD COUNT = 0 THEN job status = Successful
3. IF TOTAL RECORD COUNT = Number of records processed THEN job status = Successful
4. IF TOTAL RECORD COUNT > or < Number of records processed THEN job status = Failed

5. Status Transaction Processing:
- a. NOA IDENTIFIER – Match found
 - i. AND BVINOABRAILLETRIGGER.bviNOAStatus is Generated or Regenerated
 - ii. AND cmdr876b NOA STATUS = R
 1. Update BVINOABRAILLETRIGGER.bviNOAStatus from Generated or Regenerated to Received (not visible on forms screens)
 2. Update BVINOABRAILLETRIGGER.bviBrailleFileReceiveDate with STATUS DATE value
 3. Count transaction as processed
 - iii. AND BVINOABRAILLETRIGGER.bviNOAStatus is Received
 - iv. AND cmdr876b NOA STATUS = M
 1. Update BVINOABRAILLETRIGGER.bviNOAStatus from Received to Mailed
 2. Update BVINOABRAILLETRIGGER.bviBrailleFileMailingDate with STATUS DATE value
 3. Update CONCERNROLECOMMUNICATION Braille NOA Status from "Generated" to "Mailed" and update Status Date
 4. Count transaction as processed
 - v. AND BVINOABRAILLETRIGGER.bviNOAStatus is Generated or Regenerated
 - vi. AND cmdr876b NOA STATUS = M
 1. Update BVINOABRAILLETRIGGER.bviNOAStatus from Generated or Regenerated to Mailed
 2. Update BVINOABRAILLETRIGGER.bviBrailleFileMailingDate with STATUS DATE value
 3. Update CONCERNROLECOMMUNICATION Braille NOA Status from "Generated" to "Mailed" and update Status Date
 4. Count transaction as processed

Status Transaction Exceptions – For each of the following situations Write transaction to error log and continue processing AND Do Not count the transaction

#	Exceptions
1	NOA IDENTIFIER – No Match Found
2	NOA IDENTIFIER – Match Found AND cmdr876b NOA STATUS = R or M AND bvinoaStatus = Pending Generation or Pending Regeneration
3	NOA IDENTIFIER – Match Found AND cmdr876b NOA STATUS = R AND bvinoaStatus = Received
4	NOA IDENTIFIER – Match Found AND cmdr876b NOA STATUS = M AND bvinoaStatus = Mailed
5	NOA IDENTIFIER – Match Found AND cmdr876b NOA STATUS = R or M OR STATUS DATE is Not in CCYYMMDD format
6	NOA IDENTIFIER – Match Found AND cmdr876b NOA STATUS is blank or is other than R or M AND STATUS DATE is blank or not (8) characters

Error Processing

When transaction is processed by Case Management and logging is enabled, transaction data is logged in the Case Management log file. Also see processing criteria.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMDR876C – IHSS Required Forms Large Font PDF Receive

CI	Document Name
 CI-706229 - DSD EINTF IHSS Required Forms Large Font PDF Receive CMDR876C IMPLEMENTED	DSD_EINTF_IHSS_Required_Forms_Large_Font_PDF_Receive_CMDR876C.doc

Internal Layout/System Mapping – IHSS Required Forms Large Font PDF Receive

Source: Braille NOA Service Provider		Target: Case Management			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmdr876c.xml <?xml version="1.0"? encoding="UTF-8"?> <ihsspdfReceive>	N/A	N/A	N/A	Braille IHSS PDF Status File Header /Begin File	N/A
<ihsspdfReceiveDetail>	N/A	N/A	N/A	Begin transaction	N/A
<ihsspdfIdentifier> </ihsspdfIdentifier>	N/A	BVINOABRAILLETRIGGER. bviNOAIdentifier	CHARACTER (18-20)	Random generated unique sequence number. Example: "117687020160602610"	N/A
<filename> </filename>	N/A	BVINOABRAILLETRIGGER. bviNOAIdentifier	CHARACTER (32 – 45)	PDF File Name Example: "cmds876a1176870SOC22722016060 601_1.pdf"	Match
</ihsspdfReceiveDetail>	N/A	N/A	N/A	End transaction – repeat transactions as needed	
<recordCount> </recordCount>	N/A	cmdr876c Batch Log	NUMERIC	Total Number of status records to be delivered. If no status records then Value = 0 This schema is not repeated.	R
</ihsspdfReceive>	N/A	N/A	N/A	End File	N/A

Trigger Events

Batch job

Processing Criteria

1. IF no file found on ProcServer in "/ProcServer/cmips2/interface/<env>/<date>/cmdr876c" THEN job status = Failed
2. If no transactions exist for this interface on a processing day the status xml with TOTAL RECORD COUNT Value = "0" will still be sent. IF TOTAL RECORD COUNT = 0 THEN job status = Successful
3. IF TOTAL RECORD COUNT = Number of records processed THEN job status = Successful
4. IF TOTAL RECORD COUNT > or < Number of records processed THEN job status = Failed
5. Status Transaction Processing:
 - a. NOA IDENTIFIER – Match found
 - i. Insert a record in ATTACHMENT table with the received Large Font PDF File Content.
 - ii. Update the CONCERNROLECOMMUNICATION with the new ATTACHMENTID.
 - iii. Insert a record in CONCERNROLECOMMUNICATIONSNAPSHOT.

Status Transaction Exceptions – For each of the following situations Write transaction to error log and continue processing AND Do Not count the transaction as processed

#	Exceptions
1	NOA IDENTIFIER – No Match Found

Error Processing

When transaction is processed by Case Management and logging is enabled, transaction data is logged in the Case Management log file. Also see processing criteria.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/CMNS876D – IHSS BVI One-Time Mailing

CI	Document Name
 CI-790165 - DSD EINTF IHSS BVI One Time Mailing CMNS876D IMPLEMENTED	DSD_EINTF_IHSS_BVI_One_Time_Mailing_CMNS876D.docx

Internal Layout/System Mapping – IHSS Required Forms PDF Listing

Source: Case Management			Target: Braille Works		
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
BRAILLE MANIFEST XML	N/A	<?xml version="1.0"? encoding="UTF-8"?><ihsspdfBraille>	N/A	Braille IHSS Required Forms PDF Send File Header /Begin File	R
IHSS PDF TRANSACTION	N/A	<ihsspdfData>	N/A	Begin transaction	R
BVINOABRAILLETRIGGER	bviNOAIdentifier	<ihsspdfIdentifier></ihsspdfIdentifier>	CHARACTER (18-20)	Random generated unique sequence number. Example: "117687020160602610"	R
BVINOABRAILLETRIGGER	bviBrailleFileName	<filename>	CHARACTER (32 – 45)	PDF File Name Example: "cmns876d1176870ONETIME2016060601_1.pdf"	R
TECHNICAL NAME(8)	N/A	N/A	N/A	Value = "cmns876d"	N/A
CASE or PROVIDER NUMBER	N/A	N/A	CHARACTER(7-10)	Examples: "1234567" "123456789"	N/A
TEMPLATE TYPE(3 - 9)	N/A	N/A	CHARACTER(3 – 9)	Values are: ONETIME	N/A
NOA CREATE DATE(8)	N/A	N/A	CCYYMMDD(8)	Date IHSS PDF request created by user Example: "20150315"	N/A
SEQUENCE NUMBER (2)	N/A	N/A	CHARACTER(5)	CMIPS generated sequence number unique to the generated PDF file Example: "01_1"	N/A
EXTENSION(4)	N/A	<filename>	EXTENSION (4)	Value = ".pdf"	N/A
BVI FORMAT	N/A	<bviFormat></bviFormat>	CHARACTER (10)	Values are: LARGEFONT (8) AUDIOCD (7) DATACD (6) BRAILLE (7)	R
CONCERNROLECOMMUNICATION	CORESPONDENT NAME	<recipientName></recipientName>	CHARACTER	<FIRST NAME MIDDLE INITIAL LAST NAME> Example: "Jane R. Doe"	R
CONCERNROLECOMMUNICATION	ADDRESSID LINE 1	<addressLine1></addressLine1>	CHARACTER	Example: "C/O Joe Provider" or "123 West Main Street" or "123 West Main Street STE 100A"	R
CONCERNROLECOMMUNICATION	ADDRESSID LINE 2	<addressLine2></addressLine2>	CHARACTER	Example: "123 West Main Street"	O
CONCERNROLECOMMUNICATION	ADDRESSID LINE 3	<addressLine3></addressLine3>	CHARACTER	Example: "Suite 100A"	O
CONCERNROLECOMMUNICATION	ADDRESSID MAILING CITY	<addressCity></addressCity>	CHARACTER	Example: "Any Town"	R

CONCERNROLECOMMUNICATION	ADDRESSID MAILING STATE	<addressState> </addressState>	CHARACTER	Example: "CA"	R
CONCERNROLECOMMUNICATION	ADDRESSID MAILING ZIP + (4)	<addressZip> </addressZip>	CHARACTER	Example: "12345" or "12345-6789"	R
CASECOUNTY	COUNTY NAME	<returnCounty> </returnCounty>	CHARACTER	County Address Name Example: "SAN BERNARDINO COUNTY"	R
CASECOUNTY	COUNTY ADDRESS LINE 1	<returnAddressLine1> </returnAddressLine1>	CHARACTER	County Mailing Address Line 1 Example: "686 MILL ST."	R
CASE COUNTY	COUNTY ADDRESS LINE 2	<returnAddressLine2> </returnAddressLine2>	CHARACTER	County Mailing Address Line 2 Example: "SAN BERNARDINO, CA 92415"	R
END NOA TRANSACTION	N/A	</ihsspdfData>	N/A	End transaction – repeat transactions as needed	R
TOTAL PDF COUNT	N/A	<pdfCount> </pdfCount>	NUMERIC	Total Number of PDF to be delivered. If no PDF then Value = 0 This schema is not repeated.	R
END BRAILLE MANIFEST	N/A	</ihsspdfToBraille>	N/A		R

Internal Layout/System Mapping – One Time Mailing

Source: Case Management		Target: Braille Works			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
IHSS REQUIRED FORMS PDF GENERATION	N/A	File generated is a PDF of the following IHSS Required Forms Documents One Time Mailing.	VARIABLE	File name for each PDF: Example: "cmns876d1234567ONETIMECCYYMMDDXX.PDF"	R

Trigger Events

BVI IHSS Required Forms Option of Large Font, Audio CD, Data CD or 'Braille Document' has been indicated.

Standard PDF has been produced.

Processing Criteria

If no PDFs are generated for this interface on a processing day the xml manifest listing with TOTAL PDF COUNT Value = "0" will still be sent to BPM for delivery.

Error Processing

When transaction is sent by Case Management and logging is enabled, transaction data is logged in the Case Management log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/IHSS Website Account Activity – IWOM885A

CI	Document Name
 CI-795504 - DSD EINTF IHSS Website Account Activity IWOM885A IMPLEMENTED	DSD_EINTF_IHSS_Website_Account_Activity_IWOM885A.docx

Internal Layout/System Mapping

Data Elements – Event

Source: Cúram		Target: IHSS Website			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
IWOM885A Message	operationname	operationname	STRING(32)	"recipientInactivation", "recipientReactivation"	R
	uuid	uuid	STRING(16)		R
	payload.recipientid	payload.recipientid	STRING(16)		R

Data Elements – Response

N/A

Trigger Events

This interface is called when the Yes button is pressed on either the 'Inactivate Recipient IHSS Web Registration' or 'Reactivate Recipient IHSS Web Registration' pop-up screens.

Processing Criteria

N/A

Error Processing

N/A.

Related Components

Business Process Functions

DSD_BF_IHSS_Website_Registration_Inactivation.docx

Business Flows

N/A

Business Rules

Recipient IHSS Website Registration – inactivation and reactivation

Tasks/Notifications

N/A

Screens

Inactivate Recipient IHSS Web Registration' and 'Reactivate Recipient IHSS Web Registration' pop-up screens.

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Registered User Email Update AMQP Message (IWOM885B)

CI	Document Name
 CI-797795 - DSD EINTF Registered User Email Update AMQP MESSAGE IWOM885B IMPLEMENTED	DSD_EINTF_Registered_User_Email_Update_AMQP_MESSAGE_E_IWOM885B.docx

Internal Layout/System Mapping

Data Elements – Event

Source: Cúram		Target: IHSS Website			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
IWOM885B Message	N/A	operationname	STRING(32)	"modifyEmail"	R
	N/A	uuid	STRING(16)		R
	N/A	payload.isprovider	STRING(1)		R
	N/A	payload.isrecipient	STRING(1)		R
	concernrolealternateid.alternateid	payload.providerid	STRING(18)		R
	caseheader.CaseReferenceNumber	payload.recipientid	STRING(16)		R
	emailAddressTable.emailaddress	payload.emailaddress	STRING(256)	Person email address	R

Data Elements – Response

N/A

Trigger Events

This interface is called any time a person's email is updated or added in Case Management and that person is registered on the IHSS Website.

Processing Criteria

N/A

Error Processing

N/A.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

Recip CM & OS BR 44, 45, 46, 47

Tasks/Notifications

N/A

Screens

Create Email Address and Modify Email Address screens in Case Management

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/RabbitMQ Message Consolidation (CMDE882B)

CI	Document Name
 CI-797796 - DSD EINTF RabbitMQ Message Consolidation CMDE882B IMPLEMENTED	DSD_EINTF_RabbitMQ_Message_Consolidation_CMDE882B.docx

Internal Layout/System Mapping

Data Elements – Event

Source: IHSS Website		Target: Cúram			
Table Name/ File Name/WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
CMDE882B Event	uuid	N/A	STRING (40)	Unique Identifier for the request	R
	operation[]	N/A	STRING (5)	Repeating group of AMPQ messages	R
	operationname	Operation	STRING (100)	Name of operation generating the message	R
	totalerrors	N/A	STRING (10)	Number of errors for that message	R
	totalreceived	N/A	STRING (10)	Total number of messages received	R

Data Elements – Response

Source: Cúram		Target: IHSS Website			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
CMDE882B Response	N/A	errormessages	STRING		R
	N/A	success	STRING(5)	Response Code, includes True or False. Example: "success": "true"	R
	N/A	errors	STRING	Response Code based on Processing. 200 - Success 201- Failure – Invalid Request 202 – Failure - Processing Error 203 – CMIPSII Unavailable Example: "codevalue": "200", "codedescription":"success"	R
	N/A	logistics	STRING	Additional Logistic Information which includes elapsed time, operation name, Start and End Time. Example: "logistics": "time": "250", "operation": "rabbitmqMessageConsolidation", "starttime": "2017-01-05T21:16:05.537Z", "endtime": "2017-01-05T21:16:05.537Z"	R

Trigger Events

this web service is a scheduled event and is invoked to retrieve, from CM, the count of AMQ messages that have been sent from CM and a count of pending messages that failed to be pushed down to the CMIPS Message Broker.

Processing Criteria

N/A

Error Processing

When transaction is sent to Case Management and logging is enabled, transaction data is logged in the Case Management log file.

Related Components

N/A

Business Process Functions

N/A

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

N/A

Reports

N/A

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/Alternate Format Selection – CMMS103E

CI
 CI-822863 - DSD EINTF Alternate Format Selection CMMS103E IMPLEMENTED

Internal Layout/System Mapping

Outbound

Source: Case Management		Target: Interface File			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
cmms103e-CCYYMMDDHHMMSSnnn	clientIndexNumber	CONCERNROLEALTERNATEID.ALTERNATEID	STRING (9)	Recipient's Client Index Number	R
	firstName	ALTERNATENAME.FIRSTFORENAME	STRING (25)	Recipient's First Name	R
	middleName	ALTERNATENAME.OTHERFORENAME	STRING (25)	Recipient's Middle Name	O
	lastName	ALTERNATENAME.SURNAME	STRING (30)	Recipient's Last Name	R
	noaDeliveryOption	CODETABLEITEM.CODE	STRING (30)	Description of the Recipient's selected Delivery Option for Notices of Action	R

Transaction Trigger Events

This interface file will be produced at the end of the last business day of each month.

Processing Criteria

The interface file contains a transaction for each Eligible, Presumptive Eligible, or On-Leave Recipient that is indicated as Blind or Visually Impaired in CMIPS. Each transaction will contain a snapshot of current CMIPS data. Matching is based on the following criterion:

- clientIndexNumber

Error Processing

When all the required fields are not present in CMIPS, write the information to log file.

Related Components

Business Process Functions

N/A

Business Flows

N/A

Business Rules

N/A

Tasks/Notifications

N/A

Screens

[CI-486315](#) - DSD SC Create Blind or Visually Impaired
[CI-486310](#) - DSD SC Modify Blind or Visually Impaired

Reports

N/A

Interfaces

[CI-822864](#) IDD EINTF Alternate Format Selection CMMS103E

DSD 25/Recip CM & OS – Case Maintenance/External Interfaces/EVV 35C Companion Interface - ACMS102C

CI					
 CI-823194 - DSD EINTF 35C EVV Companion Data ACMS102C IMPLEMENTED					

Internal Layout/System Mapping - EVV 35C Companion

Source: Case Management		Target: ACMS102C			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
N/A	N/A	HEVVTOTAL	NUMERIC (10)	Header Record total EVV Records	R
N/A	N/A	HMEDITTOTAL	NUMERIC (10)	Header Record total Manual Edits Count of visits where Manual Edit Indicator = 'Y'	R
LONGPAIDCLAIMSBATCH	CLAIMCONTROLNUMBER	CCN	STRING (13)	CCN value created for the associated long paid claim from the 35C for the corresponding month. Value for DSS = YYJJJ00000000 The CCN is unique in that DHCS and DDS can both use that field to identify a claim **This is the Primary Key	R
Timesheet	TIMESHEETNUMBER	timesheetNumber	NUMERIC (20)	Timesheet Number associated to the paid claim. This can be used for quick identification for troubleshooting and research by CDSS	R
ConcernRoleAlternateID	ALTERNATEID	beneficiaryCIN	CHARACTER (9)	Client Index Number (without check digit)	R
Warrant	RECIPIENTLASTNAME, RECIPIENTFIRSTNAME	beneficiaryName	STRING (60)	Recipient's Last Name, First Name	R
ConcernRoleAlternateID	ALTERNATEID	providerNumber	STRING (9)	Provider Number unique to Provider and assigned by CMIPS	R
Warrant	PAYEELASTNAME, PAYEEFIRSTNAME	providerName	CHARACTER (60)	Provider's Last Name, First Name	R
N/A	N/A	procedureCode	STRING (5)	Value = Z9525	R
Timesheet	FROMDATE	fromDate	DATE (8)	From Date for the pay period reported. CCYYMMDD	R
Timesheet	TODATE	toDate	DATE (8)	To Date for the pay period reported. CCYYMMDD	R
	Populate dynamically based on Payperiod start and end dates	payPeriodDT1	DATE (8)	1 st Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT1	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 1 st Day of the Pay Period Example: 10 minutes populates as 0010	O

EVVDetails	EVVSTARTTIME	startTimeDT1	TIME (4)	Start Time Entered by Provider for the 1 st Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT1	TIME (4)	End Time Entered by Provider for the 1 st Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT1	STRING (9)	Location Services were Provided for the 1 st Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT1	STRING (9)	Location Services were Provided for the 1 st Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT1	STRING (1)	Indicator set if the visit data was manually edited for the 1 st Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT2	DATE (8)	2 nd Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT2	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 2 nd Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT2	TIME (4)	Start Time Entered by Provider for the 2 nd Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT2	TIME (4)	End Time Entered by Provider for the 2 nd Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT2	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O

EVVDetails	EVVCHECKOUTLOCATION	endLocationDT2	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT2	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT3	DATE (8)	3 rd Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT3	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 3 rd Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT3	TIME (4)	Start Time Entered by Provider for the 3 rd Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENTIME	endTimeDT3	TIME (4)	End Time Entered by Provider for the 3 rd Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT3	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT3	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT3	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT4	DATE (8)	4 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT4	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 4 th Day of the Pay Period Example: 10 minutes populates as 0010	O

EVVDetails	EVVSTARTTIME	startTimeDT4	TIME (4)	Start Time Entered by Provider for the 4 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT4	TIME (4)	End Time Entered by Provider for the 4 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT4	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT4	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT4	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT5	DATE (8)	5 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT5	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 5 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT5	TIME (4)	Start Time Entered by Provider for the 5 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT5	TIME (4)	End Time Entered by Provider for the 5 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT5	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O

EVVDetails	EVVCHECKOUTLOCATION	endLocationDT5	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT5	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT6	DATE (8)	6 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT6	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 6 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT6	TIME (4)	Start Time Entered by Provider for the 6 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENTIME	endTimeDT6	TIME (4)	End Time Entered by Provider for the 6 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT6	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT6	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT6	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT7	DATE (8)	7 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT7	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 7 th Day of the Pay Period Example: 10 minutes populates as 0010	O

EVVDetails	EVVSTARTTIME	startTimeDT7	TIME (4)	Start Time Entered by Provider for the 7 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT7	TIME (4)	End Time Entered by Provider for the 7 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT7	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT7	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT7	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT8	DATE (8)	8 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT8	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 8 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT8	TIME (4)	Start Time Entered by Provider for the 8 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT8	TIME (4)	End Time Entered by Provider for the 8 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT8	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O

EVVDetails	EVVCHECKOUTLOCATION	endLocationDT8	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT8	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT9	DATE (8)	9 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT9	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 9 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT9	TIME (4)	Start Time Entered by Provider for the 9 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENTIME	endTimeDT9	TIME (4)	End Time Entered by Provider for the 9 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT9	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT9	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT9	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT10	DATE (8)	10 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT10	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 10 th Day of the Pay Period Example: 10 minutes populates as 0010	O

EVVDetails	EVVSTARTTIME	startTimeDT10	TIME (4)	Start Time Entered by Provider for the 10 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT10	TIME (4)	End Time Entered by Provider for the 10 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT10	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT10	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT10	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT11	DATE (8)	11 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT11	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 11 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT11	TIME (4)	Start Time Entered by Provider for the 11 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT11	TIME (4)	End Time Entered by Provider for the 11 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT11	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O

EVVDetails	EVVCHECKOUTLOCATION	endLocationDT11	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT11	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT12	DATE (8)	12 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT12	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 12 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT12	TIME (4)	Start Time Entered by Provider for the 12 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENTIME	endTimeDT12	TIME (4)	End Time Entered by Provider for the 12 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT12	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT12	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT12	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT13	DATE (8)	13 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT13	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 13 th Day of the Pay Period Example: 10 minutes populates as 0010	O

EVVDetails	EVVSTARTTIME	startTimeDT13	TIME (4)	Start Time Entered by Provider for the 13 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT13	TIME (4)	End Time Entered by Provider for the 13 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT13	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT13	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT13	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT14	DATE (8)	14 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT14	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 14 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT14	TIME (4)	Start Time Entered by Provider for the 14 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT14	TIME (4)	End Time Entered by Provider for the 14 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT14	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O

EVVDetails	EVVCHECKOUTLOCATION	endLocationDT14	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT14	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT15	DATE (8)	15 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT15	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 15 th Day of the Pay Period Example: 10 minutes populates as 0010	O
EVVDetails	EVVSTARTTIME	startTimeDT15	TIME (4)	Start Time Entered by Provider for the 15 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENTIME	endTimeDT15	TIME (4)	End Time Entered by Provider for the 15 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT15	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT15	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT15	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
	Populate dynamically based on Payperiod start and end dates	payPeriodDT16	DATE (8)	16 th Date of the Pay Period	O
Timesheet	DAYSHOURS	claimedHoursDT16	NUMERIC (4)	Claimed Hours (displayed in minutes) for the 16 th Day of the Pay Period Example: 10 minutes populates as 0010	O

EVVDetails	EVVSTARTTIME	startTimeDT16	TIME (4)	Start Time Entered by Provider for the 16 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVENDTIME	endTimeDT16	TIME (4)	End Time Entered by Provider for the 16 th Day of the Pay Period Reported by 24-hour clock (HHMM)	O
EVVDetails	EVVCHECKINLOCATION	startLocationDT16	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
EVVDetails	EVVCHECKOUTLOCATION	endLocationDT16	STRING (9)	Location Services were Provided for the 2 nd Day of the Pay Period Values are: HOME COMMUNITY	O
ETSSubmittedDetails	manualEditIndicator	manualEditDT16	STRING (1)	Indicator set if the visit data was manually edited for the 2 nd Day of the Pay Period Values are: Y or N	O
N/A	N/A	TEVVTOTAL	NUMERIC (10)	Trailer Record total EVV Records	R
N/A	N/A	TMEDITTOTAL	NUMERIC (10)	Trailer Record total Manual Edits Count of visits where Manual Edit Indicator = 'Y'	R

Trigger Events

This interface batch job is triggered to generate and send the EVV 35C Companion File to DHCS once the ACMS102A (35C) batch job for long paid claims completes for a prior month.

Processing Criteria

A Claim Control Number (CCN) has been generated into ACMS102A for the prior month's initial and supplemental IP payments, which will also have an associated CMIPS EVV 35C Companion File record entry.

Note:

1. Details for voids are not reported on this data, but a void would be reported in the 35C for a prior claim control number that had already reported the EVV data. EVV data will not be re-reported for the void action.
2. There is not a 1 to 1 correlation of EVV 35C Companion File data to claim data as other types of payments are made from CMIPS that are not impacted by EVV. This includes but is not limited to advance pay, travel claim payments, restaurant meals payments, special transactions, payments to live-in providers, etc.
3. EVV details are not reported for a record if the claimed hours for a particular day are reported as zero on the timesheet.
4. EVV details for the prior month's 35C Companion File are deleted from the database, as done with ACMS102A interface.
5. EVV 35C Companion output file will ignore records on the LONGPAIDCLAIMSBATCH trigger table where the Record Status = 'Processed/Split', since these records have now been split into single payments.

Error Processing

If DHCS encounters a problem with the in-take processing of the CMIPS EVV 35C Companion File, DHCS is expected to communicate all file processing issues to CMIPS as soon as possible. CMIPS will research reported issues and make applicable EVV 35C Companion File correction(s), and when all corrections have been made, resubmit a corrected EVV 35C Companion File to DHCS as soon as possible (prior to the 15th of the month).

Below are potential CMIPS EVV 35C Companion File errors that may be encountered:

- Inability to validate EVV 35C Companion File record count:
 - Counts in Header Record and Trailer Record do not match total EVV records, or Manual Edit records, in the EVV 35C Companion File
- Inability to link EVV 35C Companion File record with 35C Claim
 - CCN is missing or mismatched
- Mismatched/invalid record information
- File corruption detected

The table below describes the high-level activity steps taken by DHCS and CMIPS when such file processing issues arise:

Step	Org	Description
1	DHCS	Action 1: Notify CMIPS of any EVV 35C Companion File processing issues
2	CMIPS	Action 1: Research reported file errors and open CMIPS Service Desk ticket Action 2: Correct EVV 35C Companion File record error(s) and resubmit full file replacement to DHCS as soon as possible (prior to 15 th of month) Action 3: Notify DHCS that corrected EVV 35C Companion File has been resubmitted to them for processing Action 4: Update CMIPS Service Desk Ticket with resolution and resubmission information
3	DHCS	Action 1: Receive and process resubmitted/corrected EVV 35C Companion File, and notify CMIPS of processing status

Related Components

Business Process Functions

TBD

Business Flows

TBD

Business Rules

TBD

Tasks/Notifications

TBD

Screens

TBD

Reports

TBD

DSD 25/Recip CM & OS – Case Maintenance/Reporting

See DSD Section 28A, 28B, 28C or 28D for all CMIPS Reports.

DSD 25/Recip CM & OS – Case Maintenance/Batch Processing

This section will describe the identified CMIPS batch processes.

#	Batch Process Name	CI	Description	Estimated Size (Records)	Frequency	Send Receive Maintenance
1	Generate Tasks & Notification	CI-69341 - DSD BTCH PRO CRM 700kndn IMPLEMENTED	This batch program generates Tasks & Notifications based on the business rules.		Daily	Maintenance
2	35C (Long Paid Claims) (ACMS102A)	CI-69342 - DSD BTCH PRO CRM acms102a IMPLEMENTED	This batch program sends the paid claims for prior month for the IHSS payments on single warrants (Advance and Arrears payments) to DHCS.		Monthly	Send
3	IHO/WPCS Demographics (CMMS101C)	CI-69343 - DSD BTCH PRO CRM cmms101c IMPLEMENTED	This batch program sends the WPCS Provider Demographics data and paid claims for prior month for the WPCS payments.		Monthly	Send
4	SAWS Daily Receive (CMDR4XXA)	CI-69345 - DSD BTCH PRO CRM cmdr4xxa box IMPLEMENTED	This batch program process the SAWS Daily receive file.		Daily	Receive
5	MEDS Daily Receive (CMDR103B)	CI-69346 - DSD BTCH PRO CRM cmdr103b IMPLEMENTED	This batch program processes the MEDS receive transactions.		Daily	Receive
6	County Contractor Funding Source	CI-69348 - DSD BTCH pro adv p 001 10010 countycontractorcc IMPLEMENTED	Semi-Monthly/Monthly job which reports the Payroll Funding Source information for the County Contractor Payments processed by a county for each invoice.		Post Invoice Processing (Monthly or Semi-Monthly)	Send
7	MEDS Monthly Renewal – Receive (CMMR103D)	CI-69350 - DSD BTCH PRO CRM cmmr103d IMPLEMENTED	This batch program processes the MEDS monthly transactions.		Monthly	Receive
8	MEDS Quarterly Reconciliation Interface Send (CMQS103F)	CI-69351 - DSD BTCH PRO CRM cmqs103f IMPLEMENTED	This batch program sends the MEDS recon transactions.		Quarterly	Send
9	Homemaker Funding Source	CI-69352 - DSD BTCH pro adv p 001 10010 countycontractorhm IMPLEMENTED	Monthly job which reports the Payroll Funding Source information for the Homemaker Timesheets processed by a county in the calendar month.		Monthly	Send
10	HBM Send	CI-69354 - DSD BTCH pro adv p 013 10020 hbsend IMPLEMENTED	This batch job sends Provider information to payroll, to be used for HBM Send and Labor (Union) org files.		Monthly	Maintenance
11	IHO/WPCS Paid Claims (CMMS101B)	CI-69355 - DSD BTCH PRO CRM cmms101b IMPLEMENTED	This batch program sends the WPCS paid claims for the prior month for the WPCS payments.		Monthly	Send
12	County Contractor Invoice Processing County Contractor files must be available for processing by 6pm on the 10th day of a month for counties submitting on a Monthly basis. For counties submitting on a Semi-Monthly basis files must be available for processing by 6pm on the 10th and 25th of the month. Because CMIPS has assured delivery requirements, three attempts will be made to access the file on the indicated date on the County Server. If no file is retrieved, CMIPS will log this as an Exception and a Notification and Error will be sent to the Operational Team indicating "Interface not available for process". (CCXR3XXA)	CI-69356 - DSD BTCH PRO CRM ccsr3xxa IMPLEMENTED	This batch program processes the County Contractor Invoice file.		Semi-Monthly OR Monthly	Receive
13	MSSP Monthly Receive (CMMR001A)	CI-69357 - CMIPS2 BTCH pro crm cmrr001a CANCELLED	Cancelled with CR 1269			

14	Rate Change Processing	 CI-69358 - DSD BTCH PRO CRM 500qinrn IMPLEMENTED	This batch program executes the Rate change business rules		On Demand	Maintenance
15	COLA Processing	 CI-69359 - DSD BTCH PRO CRM 500oinrn IMPLEMENTED	This batch program executes the COLA processing business rules		On Demand	Maintenance
16	MEDS Daily Send (CMDS103C)	 CI-69360 - DSD BTCH PRO CRM cmds103c IMPLEMENTED	This batch program sends the MEDS daily transactions.		Daily	Send
17	SCI Daily Receive (CMDR106B)	 CI-69361 - DSD BTCH PRO CRM cmdr106b IMPLEMENTED	This batch program processes the daily SCI updates against IHSS Recipient cases.		Daily	Receive
18	Advance Pay Indicator	 CI-116233 - DSD BTCH pro adv p h 028 10061 sharecostindadvpay IMPLEMENTED	Case Management sends the monthly data prior to the Advance Pay payment cycle after processing of the MEDS monthly renewal.		Monthly	Maintenance
19	Approaching 14th Birthday	 CI-116236 - DSD BTCH PRO CRM 500ainmn IMPLEMENTED	This batch job sends a Task to the case owner the first day of the month in which a Recipients child turns 14		Monthly	Maintenance
20	Approaching 18th Birthday	 CI-116237 - DSD BTCH PRO CRM 500cinmn IMPLEMENTED	This batch job sends a Task to the case owner the first day of the month prior to the month the Recipient turns 18		Monthly	Maintenance
21	Assigned IP Hours are not equal to IP Mode of Service Hours	 CI-116238 - DSD BTCH PRO CRM 700bindn IMPLEMENTED	This batch job sends a Notification to the case owner when the aggregated total hours for case Providers indicated with "Assigned Hours" do not equal the Individual Provider Mode of Service hours.		Daily	Maintenance
22	Case Has No Assigned Provider	 CI-116242 - DSD BTCH PRO CRM 700cindn IMPLEMENTED	This batch job sends a Notification to the case owner when an active status case has not active status Providers		Daily	Maintenance
23	County Contractor Invoice Detail Request	 CI-116250 - DSD BTCH PRO CRM prmr933a IMPLEMENTED	Case Management sends county contractor invoice details to payroll.		Monthly	Maintenance
24	Homemaker Funding Source	 CI-116270 - DSD BTCH Homemaker Funding Source Maintenance IMPLEMENTED	Case Management sends Homemaker Timesheet Details to payroll		Monthly	Maintenance
25	No Initial Medi-Cal Eligibility Received	 CI-116289 - DSD BTCH PRO CRM 700dindn IMPLEMENTED	This batch job sends a Task to the case owner when a SAWS S3 Transaction is received and the 'Medi-Cal Status' is Denied and The 'Medi-Cal Status Effective Date' is not older than 90 days from the Medi-Cal Eligibility Referral Date.		Weekly	Maintenance
26	Paramedical Service Authorization Expiring	 CI-116294 - DSD BTCH PRO CRM 700eindn IMPLEMENTED	This batch job sends a Task to the case owner 15 days prior a Paramedical Services Expiration Date		Daily	Maintenance
27	Pending Paramedical Authorization	 CI-116300 - DSD BTCH PRO CRM 700findn IMPLEMENTED	This batch job sends a Notification to the case owner 30 days after the IHSS Determination Date of an Authorization when the Paramedical Service was indicated "Pending Receipt of Additional Information" is "Yes"		Daily	Maintenance
28	Pending Protective Supervision	 CI-116301 - DSD BTCH PRO CRM 700gindn IMPLEMENTED	This batch job sends a Notification to the case owner 30 days after the IHSS Determination Date of an Authorization when the Protective Supervision Service was indicated "Pending Receipt of Additional Information" is "Yes"		Daily	Maintenance

29	Time Limit Service Expired	CI-116327 - DSD BTCH PRO CRM 700hindn IMPLEMENTED	This batch job sends a Notification to the case owner 15 days prior to the expiration of a one-time Service		Daily	Maintenance
30	Health Care Certification	CI-118994 - DSD BTCH PRO CRM 500minds IMPLEMENTED	This batch job will trigger the Task to the Case Owner when a Health Care Certification Reason of Pending is associated with a case and 45 days have passed since the Health Care Certification Date.		Daily	Maintenance
31	Modify LMA	CI-123866 - DSD BTCH PRO CRM p 500rinn IMPLEMENTED	This process will run against all Eligible, Presumptive Eligible Status cases when a modification is made to LMA percentage	Active caseload	On request by CR	Maintenance
32	Modify Reduced Hours	CI-123867 - DSD BTCH Modify Reduced Hours IMPLEMENTED	This process will run against all Eligible, Presumptive Eligible Status cases when a modification is made to Reduced Hours percentage	Active caseload	On request by CR	Maintenance
33	Create Homemaker payments processed report (PRMR934A)	CI-291185 - DSD BTCH PRO CRM p prmr934a IMPLEMENTED	This batch job creates a report for all Homemaker payments processed by a County/District Office and Funding source in the calendar month. XML file that was generated will be processed by Payroll Financial system to record the payments.	N/A	Monthly	Maintenance
34	Process returned SAWS S8 transactions with error codes (501EINDR)	CI-291192 - CMIPS2 BTCH pro crm p 501eindr IMPLEMENTED	This batch job processes returned SAWS S8 transactions with error codes.	N/A	Daily	Receive
35	Load Future Monthly Medi-Cal Records from MEDS Monthly Renewal Receive Interface (CMMR103D)	CI-291193 - DSD BTCH PRO CRM p 4xxaindr IMPLEMENTED	This batch job loads Medi-Cal Records for the Future Month.	N/A	Monthly	Maintenance
36	Process returned SAWS S1 transactions with error codes (501AINDR)	CI-291196 - DSD BTCH PRO CRM p 501aindr IMPLEMENTED	This batch job processes returned SAWS S1 transactions with error codes.	N/A	Daily	Receive
37	Create Batch Assessment Based on MEDS Receive Triggers (441AINDR)	CI-291200 - DSD BTCH PRO CRM p 441aindr IMPLEMENTED	This batch job creates batch assessment based on triggers created by MEDS receive.	N/A	Daily	Maintenance
38	Process SAWS S3 inbound transactions (501CINDR)	CI-291208 - DSD BTCH PRO CRM p 501cindr IMPLEMENTED	This batch job processes SAWS S3 inbound transactions.	N/A	Daily	Maintenance
39	Insert COLA percentage triggers (500PINRN)	CI-291212 - DSD BTCH PRO CRM p 500pinrn IMPLEMENTED	This batch job inserts COLA Percentage Triggers.	N/A	AdHoc	Maintenance
40	Send exceptioned SAWS received records back to SAWS systems (501GINDS)	CI-291214 - DSD BTCH PRO CRM p 501ginds IMPLEMENTED	This batch job sends exceptioned SAWS received records back to SAWS systems.	N/A	Daily	Send
41	Process IHO/WPCS Demographics file (CMMR101A)	CI-291215 - DSD BTCH PRO CRM p cmmr101a IMPLEMENTED	This batch job processes the file In-Home Operations (IHO) provides (CMMR101A) containing Client Index Numbers (CINs) for IHO Recipients and wait-listed clients. CMIPS will compare this list with Recipients known to CMIPS and will provide a return file (CMMS101C). Note: This batch is on hold until further notice.	N/A	Monthly	Receive
42	Create a default record for each recipient without a Medical Eligibility record for the current month (500DINMN)	CI-291218 - DSD BTCH PRO CRM p 500dinmn IMPLEMENTED	This batch job finds all recipients without a Medical Eligibility record for the current month and creates a default record for each recipient.	N/A	Monthly	Maintenance
43	No SSN Received (500FINDN)	CI-291225 - DSD BTCH PRO CRM p 500findn CANCELLED	Cancelled by ASR Sprint 70 Team CM&AS			
44	Process returned SAWS S5 transactions with error codes (501DINDR)	CI-291227 - DSD BTCH PRO CRM p 501dindr IMPLEMENTED	This batch job processes returned SAWS S5 transactions with error codes.	N/A	Daily	Receive

45	Recipients Turning 18 Years Old (500BINMN)	 CI-291232 - DSD BTCH PRO CRM 500binmn IMPLEMENTED	This batch job generates a list of Recipients who are turning 18 years old in the next month.	N/A	Monthly	Maintenance
46	Create separate files for batch assessment based on MEDS receive triggers (500NINDS)	 CI-291246 - DSD BTCH PRO CRM p 500minds IMPLEMENTED	This batch job creates separate files for batch assessment based on triggers created by MEDS receive.	N/A	Daily	Receive
47	Process exceptioned SAWS S0 transactions (501GINDR)	 CI-291249 - DSD BTCH PRO CRM p 501gindr IMPLEMENTED	This batch job will process exceptioned SAWS S0 inbound transaction records received from SAWS systems.	N/A	Daily	Maintenance
48	Trigger SCI Clearance Task Batch Job	 CI-444452 - DSD BTCH PRO CRM 600bindn IMPLEMENTED	This batch triggers a task to the Case Owner when a Person Type Recipient or Applicant has had a change to any of the following fields <ul style="list-style-type: none"> • First Name • And/or Middle Name • And/or Last Name • And/or Date of Birth • And/or Gender • And/or Social Security Number • and three (3) business days have passed since the change occurred 	Unknown	Daily	Maintenance
49	Update Provider Assigned Hours (600GINRN)	 CI-445481 - DSD BTCH PRO CRM 600GINRN IMPLEMENTED	This batch program adjusts the LMA hours for Providers with Assigned Hours.	Subject to affected number of cases.	On Request	None
50	Centralized Print Solution (500XINRN)	 CI-445483 - DSD BTCH PRO CRM 500xinrn IMPLEMENTED	This batch program will be used to generate CMIPS Notices of Action or other CMIPS forms or documents in PDF to HP Print Center based on client request.	Variable	On-going	Maintenance
51	CMNS997A Interface Job	 CI-445484 - DSD BTCH PRO CRM CMNS997A IMPLEMENTED	This batch job will send a print file to a print center containing LMA Notices of Action to be mailed out by the Print Center after LMA processing is completed.	Active caseload	On request by CR	Send
52	Number of Active Cases (600findn) This batch process runs after Update Case Status	 CI-480751 - DSD BTCH PRO CRM 600findn IMPLEMENTED	This batch job will determine the "Number of Active Cases" associated with a Provider and update the Provider Details – Number of Active Cases field	Unknown	Daily	Maintenance
53	Nightly Batch Job to End Date Provider Workweek Agreement (600dindn)	 CI-480754 - DSD BTCH PRO CRM 600dindn IMPLEMENTED	This batch job will End Date a Provider Workweek Agreements	Unknown	Daily	Maintenance
54	Nightly Batch Job to End Date Recipient Workweek Agreement (500iindn)	 CI-480765 - DSD BTCH PRO CRM 500iindn IMPLEMENTED	This batch job will End Date a Recipient Workweek Agreements	Unknown	Daily	Maintenance
55	Number of Active Providers (500hindn) *This batch process runs after "Update Case Status" batch	 CI-480753 - DSD BTCH PRO CRM 500hindn IMPLEMENTED	This batch job will determine the number of "Active" Providers associated with a case and update the Case Home Number of Active Providers field	Unknown	Daily	Maintenance
56	Nightly Batch Job to Calculate Recipient Weekly Maximum and Monthly Overtime Maximum (500jindn)	 CI-480759 - DSD BTCH PRO CRM 500jindn IMPLEMENTED	This batch job will calculate the Recipient Weekly Maximum and Monthly Overtime Maximum	Unknown	Daily	Maintenance
57	Nightly Batch Job to Calculate Provider Weekly Maximum and Monthly Overtime Maximum (600eindn)	 CI-480764 - DSD BTCH PRO CRM 600eindn IMPLEMENTED	This batch job will calculate the Provider Weekly Maximum and Monthly Overtime Maximum	Unknown	Daily	Maintenance
58	Distribute Batch Recipient Workweek Agreement Triggers (500iINRN)	 CI-487349 - DSD BTCH PRO CRM p 500iinrn IMPLEMENTED	This batch job distributes the trigger records in Batch Recipient Workweek Agreement Trigger table across 3 different PROD servers.	N/A	Daily	Maintenance
59	BVI ISO NOA Send (AADS875A)	 CI-497811 - DSD BTCH PRO CRM AADS875A CANCELLED	Cancelled with CR 026			

60	BVI Textual NOA Process (AADE899A)	CI-497812 - DSD BTCH PRO CRM AADE899A CANCELLED	Cancelled with CR 026			
61	BVI Mailing Status Update (AADR875B)	CI-497813 - DSD BTCH PRO CRM AADR875B CANCELLED	Cancelled with CR 026			
62	BVI Format Document Status (CMDR876B)	CI-500968 - DSD BTCH PRO CRM CMDR876B IMPLEMENTED	This batch program will update the generation and mailing status of the IHSS NOAs and Required Forms that were process by Braille Works into the indicated BVI Formats.	N/A	Daily	Receive
63	IHSS Notice of Action and Required Forms to BVI Format – Documents and manifest (CMDS876A)	CI-500969 - DSD BTCH PRO CRM CMDS876A IMPLEMENTED	This batch program will place IHSS Notice of Action and Required Forms standard PDF documents on the SFT Server for pickup by Braille Works	N/A	Daily	Send
64	Forms Job for NOAs (500MINDN)	CI-507322 - DSD BTCH PRO CRM 500mindn IMPLEMENTED	This batch program processes all pending NOA Forms and prints to the CMIPS Printer.	N/A	Daily	Maintenance
65	Process FPO Eligibility (603HINDN)	CI-508603 - DSD BTCH PRO CRM p 603hindn IMPLEMENTED	This batch job processes all FPO Eligibility Triggers and Generate FPO Eligibility Segments.	N/A	Daily	Maintenance
66	Hours Exceeds Authorized Hours Batch Job and E-Timesheet Enrollment (cmds989a)	CI-674838 - DSD BTCH PRO CRM cmds989a IMPLEMENTED	Generates PDF Provider and Recipient letters when the claimed hours on a timesheet exceeds the recipient monthly authorized hours or the providers assigned hours for printing at the County printers.	N/A	Daily	Send
67	Provider Recipient Flexible Hours Forms Print job (521MINDN)	CI-675655 - DSD BTCH PRO CRM 521MINDN IMPLEMENTED	This batch job will print any Approval, Denial or Cancellation of Flexible Hours forms triggered	Variable	Daily	Maintenance
68	Large Font BVI PDF Document receive (CMDR876C)	CI-706230 - DSD BTCH PRO CRM CMDR876C IMPLEMENTED	This batch program will ingest into CMIPS the Large Font BVI documents generated by Braille Works.	N/A	Daily	Receive
69	Triggers the Health Care Certification Tasks (501MINDS)	CI-775241 - DSD BTCH PRO CRM 501MINDS IMPLEMENTED	This batch job trigger Tasks to the Case Owner on both 10 business days and one (1) business day before the Health Care Certification Due Date or the Health Care Certification Extension Due Date.	Varied	Daily	Maintenance
70	One-time mailing of forms to Braille works (CMNS876D)	CI-790164 - DSD BTCH PRO CRM CMNS876D IMPLEMENTED	This batch program will copy one time mailing xml file on the SFT Server to pick up Braille Service Provider.	N/A	On Demand	Send
71	Generate User Scheduled Forms in Nightly Batch Cycle (500EINDN)	CI-790286 - DSD BTCH PRO CRM 500EINDN IMPLEMENTED	This batch job generates forms that users schedule for print in nightly batch.	Varied	Daily	Maintenance
72	Create triggers for Provider Direct Deposit (600CINDN)	CI-794932 - DSD BTCH PRO CRM 600CINDN IMPLEMENTED	This batch job will create triggers for provider when the provider has been eligible as an IHSS or WPCS provider for 30 calendar days.	Varied	Daily	Maintenance
73	Push pending AMPQ Messages (599DINDN)	CI-797797 - DSD BTCH PRO CRM 599DINDN IMPLEMENTED	Scans the ETS Message table for entries and attempts to push them down to the CMIPS Message Broker	Varied	Hourly	Maintenance
74	ETS Messages Reconciliation Email Report (608YINRN)	CI-797798 - DSD BTCH PRO CRM 608YINRN IMPLEMENTED	Retrieves counts AMPQ messages issued in CM along with the counts of those messages that have processed correctly, failed to post to the CMIPS Message Broker and failed to process. Generated email report with counts	N/A	Daily	Maintenance
75	Split Meds Daily Receive Inbound Files (cmdr999a)	CI-818621 - DSD BTCH PRO CRM p cmdr999a IMPLEMENTED	This batch job splits Meds Daily receive inbound files.	N/A	Daily	Maintenance

76	Process the Split MEDS Daily Receive Files (cmdr103x)	 CI-818622 - DSD BTCH PRO CRM p cmdr103x IMPLEMENTED	This batch job processes the split MEDS daily receive files. Note: Does the same thing as CI-818623, but both sets of batch jobs are running.	N/A	Daily	Maintenance
77	Process the Split MEDS Daily Receive Files (cmdr104x)	 CI-818623 - DSD BTCH PRO CRM p cmdr104x IMPLEMENTED	This batch job processes the split MEDS daily receive files. Note: Does the same thing as CI-818622, but both sets of batch jobs are running.	N/A	Daily	Maintenance
78	Split Inbound SAWS Receive File into a Transaction Type-Based Files (cmdr401a)	 CI-818624 - DSD BTCH PRO CRM p cmdr401a IMPLEMENTED	This batch job splits the inbound SAWS receive file into a transaction type-based files, which will be processed by the individual SAWS batch processes.	N/A	Daily	Maintenance
79	Merge the Daily SAWS Send Files Generated for Each Transaction Type into a Single Outbound File (cmds401b)	 CI-818627 - DSD BTCH PRO CRM p cmds401b IMPLEMENTED	This batch job merges the daily SAWS send files generated for each transaction type into a single outbound file.	N/A	Daily	Maintenance
80	Generate Reconciliation Report for BVI NOAs (500bvnr)	 CI-818717 - DSD BTCH PRO CRM p 500bvnr IMPLEMENTED	This batch job generates a reconciliation report for BVI NOAs.	N/A	Daily	Maintenance
81	Process County Contractor Receive Files Semi-monthly (ccsr3xxa)	 CI-818724 - DSD BTCH PRO CRM p ccsr3xxa IMPLEMENTED	This batch job processes county contractor receive file and reconciliation information will be generated for each county contractor payroll invoice.	N/A	Semi-Monthly	Maintenance
82	Process County Contractor Receive Files Monthly (ccmr3xxa)	 CI-818728 - DSD BTCH PRO CRM p ccmr3xxa IMPLEMENTED	This batch job processes county contractor receive file and reconciliation information will be generated for each county contractor payroll invoice.	N/A	Monthly	Maintenance
83	Distribute Trigger Records in BATCHPROVIDEROTMAXTRIGGER Table Across 3 Different PROD Servers (604einrn)	 CI-818734 - DSD BTCH PRO CRM p 604einrn IMPLEMENTED	This batch job distributes the trigger records in BATCHPROVIDEROTMAXTRIGGER table across 3 different PROD servers.	N/A	Daily	Maintenance
84	Distribute Trigger records in BATCHPWATRIGGER Table Across 3 Different PROD Servers (604dinrn)	 CI-818735 - DSD BTCH PRO CRM p 604dinrn IMPLEMENTED	This batch job distributes the trigger records in BATCHPWATRIGGER table across 3 different PROD servers.	N/A	Daily	Maintenance
85	Send BVI Stats at regular intervals to Help Desk (601YINRN)	 CI-818795 - DSD BTCH PRO CRM p 601yinrn IMPLEMENTED	This batch job is used to send BVI Stats at regular intervals to Help Desk.	N/A	Daily	Maintenance
86	EVV Centralized Print Solution (712LINDN)	 CI-819054 - DSD BTCH PRO CRM 712LINDN IMPLEMENTED	Batch job to Print EVV Forms in Centralized Printing	Varied	On-Going	Maintenance
87	Trigger the 2 Day ESP Inactivation Task (500DINAN)	 CI-822520 - DSD BTCH PRO CRM 500DINAN IMPLEMENTED	Batch job will generate a task when 2 calendar days have passed since county inactivation of ESP and the recipient has no new registration in ESP or TTS.	N/A	Daily	Maintenance
88	MEDS Monthly No Auto-Rescind Notification (501DINMN)	 CI-822648 - DSD BTCH PRO CRM 501DINMN IMPLEMENTED	This batch job will run on the 1st business day of the month and trigger the notifications for cases which are still in terminated status after 90 days of SAWS termination.	N/A	Monthly	Maintenance
89	Update IVRServiceEnabled Flag to True (890DINDN)	 CI-818779 - DSD BTCH PRO CRM p 890dindn IMPLEMENTED	This batch job will update IVRServiceEnabled flag to be true to enable BVI IVR services when the Maintenance page is off	N/A	Daily	Maintenance
90	Update IVRServiceEnabled Flag to False (891DINDN)	 CI-818781 - DSD BTCH PRO CRM p 891dindn IMPLEMENTED	This batch job will update IVRServiceEnabled flag to be false to disable BVI IVR services when the Maintenance page is on	N/A	Daily	Maintenance
91	Process County Direct Mailing Records (750BINRN)	 CI-818788 - DSD BTCH PRO CRM p 750binrn IMPLEMENTED	This batch job processes county direct mailing records.	N/A	AdHoc	Maintenance
92	Alternate Format Selection (CMMS103E)	 CI-822865 - DSD BTCH PRO CRM CMMS103E IMPLEMENTED	This batch job triggers the CMMS103E interface to produce and send the Alternate Format Selection file to DHCS and a copy to CDSS.	N/A	Monthly (Last business day of each month)	Send

93	Monthly Batch Job to Delete Attachment IDs from Cloudian (500AINWN)	 CI-822904 - DSD BTCH PRO CRM 500AINWN IMPLEMENTED	This batch job picks up all the Recipient form attachment IDs which are generated for that month and deletes them from Cloudian.	N/A	Monthly	Maintenance
94	Monitor PDF Migration and Send Cloudian Alert (801ZINDN)	 CI-823055 - DSD BTCH PRO CRM 801ZINDN IMPLEMENTED	This batch job runs every 15 minutes which monitors the PDF migration and sends an alerts to the Ops team if there is any failure.	N/A	Daily (every 15 minutes)	Send
95	Meds Alert Receive - CMDR103A	 CI-291596 - DSD BTCH PRO BAW cmdr103a IMPLEMENTED	This batch job receives the daily and reconciliation (recon) MEDS alerts from DHCS – MEDS.	Varied	Daily	Receive
96	CCI Managed Care - AAMR108A	 CI-816715 - DSD BTCH PRO BAW p aamr108a IMPLEMENTED	This batch job receives a file from DHCS of individuals known in Medi-Cal Eligibility Data System (MEDS) to be enrolled in specified managed care plans in order to obtain data on IHSS services that might be provided to those individuals. This interface file is used to generate data download files to each plan based on matching criteria for the data provided in this receive file.	N/A	Monthly	Receive
97	Process County Contractor Invoice (07) - CCSR307A	 CI-816729 - DSD BTCH PRO BAW p ccmr307a 1st IMPLEMENTED	This batch job processes County Contractor reconciliation Invoice for 07 county.	N/A	Monthly	Receive
98	Batch Job to Display All the Errors in County Contractor File (700CINBN)	 CI-823215 - DSD BTCH PRO CRM 700CINBN IMPLEMENTED	This batch job runs after all the existing county contractor job finishes in the county_contractor_box; which displays all the errors while processing the county contractor file.	N/A	Monthly	Maintenance
99	35C EVV Companion Data (ACMS102C)	 CI-823292 - DSD BTCH PRO CRM acms102c IMPLEMENTED	This batch program sends the EV V 35C Companion File data for 35C claims that have corresponding EVV data (IP only)	N/A	Monthly	Send
100	35C (Long Paid Claims) for Multi-Pay Warrants (ACMS102D)	 CI-823668 - DSD BTCH PRO CRM acms102d IMPLEMENTED	This batch program sends the paid claims for prior month for the IHSS payments on multi-pay warrants (Advance and Arrears payments) as individual payments to DHCS.	N/A	Monthly	Send
101	WPCS Residual Payments (600AINWN)	 CI-824354 - DSD BTCH PRO CRM 600ainwn IMPLEMENTED	This batch job will identify all warrants generated during the week with a WPCS funding source for a pay period in which the Recipient indicated the warrant was under a residual (IHSSR-funded) case. The batch will update the WPCSRESIDUALPAYMENT table with key details from the WPCS warrants. This data is then summarized by pay period and net payment amount and sent to a CDSS/DHCS distribution list via email notification.	N/A	Weekly	Send

DSD 25/Recip CM & OS – Case Maintenance/Forms

See DSD Section 31A, 31B or 31C for all CMIPS Forms.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions

This section will document each of the code tables and their values and descriptions that will be utilized by the CMIPS solution. Examples of CMIPS code tables are Provider pay rates, county names, address types, or family relationship types.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Case Appeal Status

CI	Document Name
 CI-68073 - DSD CT CaseAppealStatus IMPLEMENTED	DSD_CT_CaseAppealStatus.doc

Table – Code Table: Case Appeal Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CS1	Requested	No	1	No	Yes	Set when Create or Modify State Hearing screen is saved and Scheduled Hearing Date is blank and Hearing Outcome Reason is blank.
CS2	Scheduled	No	2	No	Yes	Set when Create or Modify State Hearing screen is saved and Scheduled Hearing Date is not blank and Hearing Outcome Reason is blank.
CS3	Resolved	No	3	No	Yes	Set when Modify State Hearing screen is saved and Hearing Outcome Reason and Outcome Date are not blank.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Rescheduled Reason

CI	Document Name
CI-68087 - DSD CT RescheduledReason IMPLEMENTED	DSD_CT_RescheduledReason.doc

Table – Code Table: Rescheduled Reason

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
RS001	Recipient Request	No	1	No	Yes	
RS002	County Request	No	2	No	Yes	
RS003	Administrative Law Judge Request	No	3	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Case Appeal Outcome

CI	Document Name
 CI-68076 - DSD CT CaseAppealOutcome IMPLEMENTED	DSD_CT_CaseAppealOutcome.doc

Table – Code Table: Case Appeal Outcome

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
EO2	Grant	No	1	No	Yes	
EO3	Denial	No	2	No	Yes	
EO501	Pending	Yes	3	No	Yes	Display when screen is created.
EO502	Conditional Withdrawal	No	4	No	Yes	
EO503	Complete Withdrawal	No	5	No	Yes	
EO504	Partial Grant / Partial Denial	No	6	No	Yes	
EO505	Dismissal	No	7	No	Yes	
EO506	Erroneous Entry	No	8	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Inter-County Transfer Status

CI	Document Name
 CI-68086 - DSD CT InterCountyTransferStatus IMPLEMENTED	DSD_CT_InterCountyTransferStatus.doc

Table – Code Table: Inter-County Transfer Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
ICTS01	In-Progress	Yes	1	No	Yes	
ICTS02	Transfer Complete	No	2	No	Yes	
ICTS03	Cancelled	No	3	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Case Status

CI	Document Name
CI-68084 - DSD CT CaseStatus IMPLEMENTED	DSD_CT_CaseStatus.doc

Table – Code Table: Case Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CS001	Pending	Yes	1	No	Yes	
CS002	Eligible	No	2	No	Yes	
CS003	Presumptive Eligible	No	3	No	Yes	
CS004	Leave	No	4	No	Yes	
CS005	Terminated	No	5	No	Yes	
CS006	Denied	No	6	No	Yes	
CS007	Application Withdrawn	No	7	No	Yes	
CS008	In-Progress	No	8	No	No	This Status will only display in a user's My Cases when the user is the "Assigned Worker" on an "In-Progress" Inter-County Transfer.
CS009	Active	No	9	No	Yes	This Status will only be selectable from the Case Status field, in the Search Criteria cluster, on the User Workload screen in the Supervisor Workspace Module. When selected and a search is performed the results will be any case with a status of Pending, Eligible, Presumptive Eligible or Leave. This value is not a selectable value in the Case Management application.
CS010	Inactive	No	10	No	Yes	This Status will only be selectable from the Case Status field, in the Search Criteria cluster, on the User Workload screen in the Supervisor Workspace Module. When selected and a search is performed the results will be any case with a status of Terminated, Denied or Application Withdrawn. This value is not a selectable value in the Case Management application.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Withdrawal

CI	Document Name
 CI-68077 - DSD CT Withdrawal IMPLEMENTED	DSD_CT_Withdrawal.doc

Table – Code Table: Withdrawal

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
WO001	Withdrawal requested by Recipient	No	1	No	Yes	Selection generates NOA
WO002	Withdrawal Status at Conversion	No	2	No	No	Set at conversion

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Leave

CI	Document Name
CI-68081 - DSD CT Leave IMPLEMENTED	DSD_CT_Leave.doc

Table – Code Table: Leave

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
L0001	Temporarily in Hospital.	No	1	No	Yes	Selection generates NOA
L0002	Temporarily in SNF	No	2	No	Yes	Selection generates NOA
L0003	Temporarily in ICF	No	3	No	Yes	Selection generates NOA
L0004	Temporarily in CCF	No	4	No	Yes	Selection generates NOA
L0005	Temporarily out of State over 6 months.	No	5	No	Yes	Selection generates NOA
L0006	Undervalue disposal of resources.	No	6	No	Yes	Selection generates NOA
L0007	Leave Status at Conversion	No	7	No	No	Leave Status at Conversion
L0008	Other Facility	No	8	No	Yes	Selection generates NOA

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Case Close Reason

CI	Document Name
CI-68074 - DSD CT CaseCloseReason IMPLEMENTED	DSD_CT_CaseCloseReason.doc

Table – Code Table: Case Close Reason

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CC501	No longer in own home.	No	1	No	Yes	Selection generates NOA
CC502	Recipient request.	No	2	No	Yes	Selection generates NOA
CC503	Recipient did not pay IHSS Share of Cost.	No	3	No	Yes	Selection generates NOA
CC504	Out of State longer than 60 days.	No	4	No	Yes	Selection generates NOA
CC505	Moved out of State.	No	5	No	Yes	Selection generates NOA
CC506	Failure to provide needed information.	No	6	No	Yes	Selection generates NOA
CC507	Not returning home from Hospital.	No	7	No	Yes	Selection generates NOA
CC508	Not returning home from CCF.	No	8	No	Yes	Selection generates NOA
CC509	Not returning home from ICF	No	9	No	Yes	Selection generates NOA
CC510	Not returning home from SNF.	No	10	No	Yes	Selection generates NOA
CC511	Recipient Death	No	11	No	Yes	Selection generates NOA
CC512	Out of Country longer than 30 days	No	12	No	Yes	Selection generates NOA
CC513	Whereabouts unknown	No	13	No	Yes	Selection generates NOA
CC514	Non-cooperation with Medi-Cal	No	14	No	Yes	Selection generates NOA
CC515	Terminated at Conversion	No	15	No	No	
CC516	Suspect SSN	No	16	No	Yes	Selection generates NOA
CC517	Duplicate SSN	No	17	No	Yes	Selection generates NOA
CC518	Health Care Certification – Not Received	No	18	No	Yes	Selection generates NOA
CC519	Non-Compliance – UHV	No	19	No	Yes	Selection generates NOA
CC520	Health Care Certification – No Need	No	20	No	Yes	Selection generates NOA
CC522	Enrolled in PACE program	No	21	No	Yes	Selection generates NOA

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Rescind

CI	Document Name
CI-68089 - DSD CT Rescind IMPLEMENTED	DSD_CT_Rescind.doc

Table – Code Table: Rescind

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
R0001	State Hearing Filed before Termination effective	No	1	No	Yes	Selection generates NOA
R0002	Recipient rescinds request for termination of services	No	2	No	Yes	
R0003	Administrative Error	No	3	No	Yes	Selection generates NOA
R0004	State Hearing Decision	No	4	No	Yes	
R0005	Medi-Cal Non-Compliance Resolved	No	5	No	No	Selection generates NOA Used for automated TR25 rescind only.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Communication Language

CI	Document Name
CI-68085 - DSD CT CommunicationLanguage IMPLEMENTED	DSD_CT_CommunicationLanguage.doc

Table – Code Table: Communication Language

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
0	American Sign Language	No	28	No	No	
1	Spanish	No	2	No	Yes	
2	CANTONESE	No	2	No	No	
3	JAPANESE	No	3	No	No	
4	Korean	No	9	No	Yes	
5	Tagalog	No	10	No	Yes	
6	OTHER NON-ENGLISH	No	6	No	No	
7	English	Yes	1	No	Yes	Default is Primary Language of Provider to whom the form will be mailed.
8	NO VALID DATA REPORTED	No	8	No	No	
9	NO RESPONSE, CLIENT DECLINED TO STATE	No	9	No	No	
A	Other Sign Language	No	29	No	No	
B	Chinese	No	3	No	Yes	
C	OTHER CHINESE LANGUAGE	No	11	No	No	
D	Cambodian	No	7	No	Yes	
E	Armenian	No	6	No	Yes	
F	ILACANO	No	14	No	No	
G	MIEN	No	15	No	No	
H	HMONG	No	16	No	No	
I	LAO	No	17	No	No	
J	TURKISH	No	18	No	No	
K	HEBREW	No	19	No	No	
L	FRENCH	No	20	No	No	
M	POLISH	No	21	No	No	
N	Russian	No	5	No	Yes	
P	PORTUGUESE	No	23	No	No	
Q	ITALIAN	No	24	No	No	
R	ARABIC	No	25	No	No	
S	SAMOAN	No	26	No	No	
T	THAI	No	27	No	No	
U	Farsi	No	8	No	Yes	
V	Vietnamese	No	4	No	Yes	
W	Hindi	No	28	No	Yes	
X	Punjabi	No	29	No	Yes	

Y	Ukrainian	No	30	No	Yes	
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DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Forms Communication Status

CI	Document Name
CI-68080 - DSD CT Forms CommunicationStatus IMPLEMENTED	DSD_CT_Forms_CommunicationStatus.doc

Table – Code Table: Forms Communication Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CS001	Pending	No	1	No	Yes	
CS002	Printed	No	2	No	Yes	
CS003	Inactivated	No	3	No	Yes	
CS004	Not Mailed	No	4	No	Yes	
CS505	Suppressed for Wage Rate	No	5	No	Yes	
CS506	Suppressed	No	6	No	Yes	
CS507	Pending Reprint	No	7	No	Yes	
CS508	Reprinted	No	8	No	Yes	
CS509	Sent To ESP	No	9	No	Yes	Displays when a 3rd party form is created with the print option Send to Recipient ESP
CS510	Downloaded	No	10	No	Yes	Displays when a 3rd party form is downloaded from the Recipient's ESP

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Homemaker Timesheet Status

CI	Document Name
CI-68079 - DSD CT HomemakerTimesheetStatus IMPLEMENTED	DSD_CT_HomemakerTimesheetStatus.doc

Table – Code Table: Homemaker Timesheet Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
HMTSS001	Not Submitted	No	1	No	Yes	
HMTSS002	Submitted	No	2	No	Yes	
HMTSS003	Rejected	No	3	No	Yes	
HMTSS004	Approved	No	4	No	Yes	
HMTSS005	Inactivate	No	5	No	No	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/County Contractor Invoice Status

CI	Document Name
 CI-68083 - DSD CT CountyContractInvStatus IMPLEMENTED	DSD_CT_CountyContractInvStatus.doc

Table – Code Table: County Contract Inv Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CCIS01	Pending	No	1	No	Yes	
CCIS02	Paid	No	2	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Unannounced Home Visit (UHV) Reason

CI	Document Name
CI-116344 - DSD CT UHV Reason IMPLEMENTED	DSD_CT_UHV_Reason.doc

Table – Code Table: UHV Reason

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
HVR001	Recipient Services Verification	No	1	No	Yes	
HVR002	Recipient Case Audit	No	2	No	Yes	
HVR003	Recipient Contact Verification	No	3	No	Yes	
HVR004	Provider Payroll Audit	No	4	No	Yes	
HVR005	Provider Residency Audit	No	5	No	Yes	
HVR006	Provider Audit	No	6	No	Yes	
HVR007	QA Investigations	No	7	No	Yes	
HVR008	County Referral	No	8	No	Yes	
HVR009	State Referral	No	9	No	Yes	
HVR010	Anonymous Fraud Call	No	10	No	Yes	
HVR011	Unreconciled Advance Pay	No	11	No	Yes	
HVR012	Death Match	No	12	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/UHV Outcome

CI	Document Name
CI-116343 - DSD CT UHV Outcome IMPLEMENTED	DSD_CT_UHV_Outcome.doc

Table – Code Table: UHV Outcome

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
HVO001	No further action required	No	1	No	Yes	
HVO002	Follow-up required	No	2	No	Yes	
HVO003	Verbal warning	No	3	No	No	
HVO004	Fraud referral	No	4	No	Yes	
HVO005	Reassessment required	No	5	No	Yes	
HVO006	Entry Denied	No	6	No	Yes	
HVO007	Non-Cooperative	No	7	No	Yes	
HVO008	No Contact Made	No	8	No	Yes	
HVO009	Not Available	No	9	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/UHV Focus

CI	Document Name
 CI-116342 - DSD CT UHV Focus IMPLEMENTED	DSD_CT_UHV_Focus.doc

Table – Code Table: UHV Focus

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
HVF001	Recipient	No	1	No	Yes	
HVF002	Provider	No	2	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Form Print

CI	Document Name
 CI-68088 - DSD CT FormPrint IMPLEMENTED	DSD_CT_FormPrint.doc

Table – Code Table: Form Print

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
PO001	Print in Nightly Batch	No	1	No	Yes	Form will be printed in the nightly print batch cycle
PO002	Print Now on CMIPS Printer	No	2	No	Yes	Form will be printed immediately at the user's CMIPS print
PO003	Generate Now for Local Print	No	3	No	Yes	The pdf of the form will be generated and available on the View Form screen which is then available for printing from the user's local printer.
PO004	Send Electronic Copy to ESP	No	4	No	Yes	Form will be sent to the Recipient's Electronic Services Portal (ESP).

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Meets Residency Requirements

Table – Code Table: Meets Residency Requirements

This code table was addressed in the Online Searches and Intake Application topic.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Referral Source

Table – Code Table: Referral Source

This code table was addressed in the Online Searches and Intake Application topic.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/County

Table – Code Table: County

This code table was addressed in the Online Searches and Intake Application topic.

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI NOA Option

CI	Document Name
 CI-486347 - DSD CT BVINOAOption IMPLEMENTED	DSD_CT_BVINOAOption.docx

Table – Code Table: BVINOAOption

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
BVIDO001	No Accommodation is Needed	No	1	No	Yes	
BVIDO002	Large Font NOA	No	2	No	Yes	
BVIDO003	Braille Documents	No	3	No	Yes	
BVIDO004	Audio CD	No	4	No	Yes	
BVIDO005	Data CD	No	5	No	Yes	
BVIDO006	County Support	No	6	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/IHSS Required Forms Options

CI	Document Name
 CI-486348 - DSD CT IHSSRequiredFormsOptions IMPLEMENTED	DSD_CT_IHSSRequiredFormsOptions.docx

Table – Code Table: IHSSRequiredFormsOptions

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
BVIRF001	No Accommodation is Needed	No	1	No	Yes	
BVIRF002	Large Font Documents	No	2	No	Yes	
BVIRF003	Braille Documents	No	3	No	Yes	
BVIRF004	Audio CD	No	4	No	Yes	
BVIRF005	Data CD	No	5	No	Yes	
BVIRF006	County Support	No	6	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Blind or Visually Impaired (BVI)

CI	Document Name
 CI-486346 - DSD CT BlindorVisuallyImpaired IMPLEMENTED	DSD_CT_BlindorVisuallyImpaired.docx

Table – Code Table: BlindorVisuallyImpaired

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
BVIBOVI001	Blind	No	1	No	Yes	
BVIBOVI002	Visually Impaired	No	2	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI Timesheet Options

CI	Document Name
 CI-486345 - DSD CT BVITimesheetOptions CANCELLED	DSD_CT_BVITimesheetOptions.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#)

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI NOA Template Type

CI	Document Name
CI-497819 - DSD CT BVI NOA Template Type IMPLEMENTED	DSD_CT_BVI_NOA_Template_Type.doc

Table – Code Table: BVINOATemplateType

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
BVINT001	APPROVAL	No	1	No	Yes	
BVINT002	APPROVAL_CONTD	No	2	No	Yes	
BVINT003	DENIAL	No	3	No	Yes	
BVINT004	CHANGE	No	4	No	Yes	
BVINT005	CHANGE_CONTD	No	5	No	Yes	
BVINT006	TERM	No	6	No	Yes	
BVINT007	SOC	No	7	No	Yes	
BVINT008	MULTI	No	8	No	Yes	
BVINT009	HEARING_RIGHTS	No	9	No	Yes	
BVINT010	SERVICES_DESCRIPTION	No	10	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/BVI NOA Generation Type

CI	Document Name
CI-497820 - DSD CT BVI NOA Generation Type IMPLEMENTED	DSD_CT_BVI_NOA_Generation_Type.doc

Table – Code Table: BVINOAGenerationType

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
BVIG001	Pending Generation	No	1	No	No	
BVIG002	Generated	No	2	No	No	
BVIG003	Pending Regeneration	No	3	No	No	
BVIG004	Regenerated	No	4	No	No	
BVIG005	Mailed	No	5	No	No	
BVIG006	Suppressed	No	6	No	No	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Template ID Code

CI	Document Name
CI-502161 - DSD CT TemplateIdCode IMPLEMENTED	DSD_CT_Template_IdCode.doc

Table – Code Table: TemplateIDCode

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
TC3101	SOC 838 – Recipient Request For Assignment Of Authorized Hours To Providers	False	0	No	Yes	
TC3102	SOC 839 – IHSS Designation of Authorized Representative	False	0	No	Yes	
TC3103	SOC 295 – Application For Social Services	False	0	No	Yes	
TC3104	SOC 450 – Voluntary Services Certification	False	0	No	Yes	
TC3105	SOC 840 – Change Of Address Individual Provider/Recipient Telephone	False	0	No	Yes	
TC3106	SOC 821 – Assessment Of Need For Protective Supervision	False	0	No	Yes	
TC3107	SOC 432 – Claim For Reimbursement IHSS Program Contract Expenditures	False	0	No	Yes	
TC3108	STO-CA-0034 – Forged Endorsement Affidavit	False	0	No	Yes	
TC3109	SOC 409 – IHSS/CMIPS Elective State Disability Insurance (SDI)	False	0	No	Yes	
TC3110	SOC 426 – IHSS Program Provider Enrollment Form	False	0	No	Yes	
TC3111	SOC 829 – Enrollment/Change/Cancellation Form	False	0	No	Yes	
TC3112	SOC 332 – IHSS Recipient/Employer Responsibility Check List	False	0	No	Yes	
TC3113	SOC 827 – IHSS Individual Emergency Back-Up Plan	False	0	No	Yes	
TC3114	SOC 321 – Request For Order And Consent ParaMedical Services	False	0	No	Yes	
TC3115	SOC 825 – Protective Supervision 24 Hours A Day Coverage Plan	False	0	No	Yes	
TC3116	SOC 831 – Provider Direct Deposit Outreach Letter	False	0	No	Yes	
TC3117	SOC 404 – Recipient Direct Deposit Outreach Letter	False	0	No	Yes	
TC3118	SCIF e3067 Workers Compensation Claim Form	False	0	No	Yes	
TC3119	SOC 310 – Statement Of Facts For IHSS	False	0	No	Yes	
TC3120	Provider Reversal Of IHSS SOC Letter	False	0	No	Yes	
TC3121	Recipient Advance Pay Spend Down Letter	False	0	No	Yes	
TC3122	Recipient Reversal Of IHSS SOC Letter	False	0	No	Yes	
TC3123	Recipient Reversal of WPCS/DHCS SOC Letter	False	0	No	Yes	
TC3124	Recipient IHSS SOC Spend Down Letter	False	0	No	Yes	
TC3125	Recipient WPCS/DHSS SOC Spend Down Letter	False	0	No	Yes	
TC3130	SOC 293 – Needs Assessment Form	False	0	No	Yes	
TC3131	Case Notes	False	0	No	Yes	
TC3132	IHSS Arrears Time Sheet	False	0	No	Yes	
TC3133	IHSS Advance Arrears Time Sheet	False	0	No	Yes	
TC3134	WPCS Arrears Time Sheet	False	0	No	Yes	
TC3135	Suspended And Ineligible Provider Letter	False	0	No	Yes	
TC3136	Provider IHSS SOC Spend Down Letter	False	0	No	Yes	
TC3137	Provider WPCS/DHCS SOC Spend Down Letter	False	0	No	Yes	
TC3138	Provider Reversal WPCS/DHCS SOC Letter	False	0	No	Yes	

TC3139	Approval NOA	False	0	No	Yes	
TC3140	Denial NOA	False	0	No	Yes	
TC3141	Termination NOA	False	0	No	Yes	
TC3142	Change NOA	False	0	No	Yes	
TC3143	MultiPurpose NOA	False	0	No	Yes	
TC3144	SOC NOA	False	0	No	Yes	
TC3145	SOC 851 – Notice Of Provider Ineligibility	False	0	No	Yes	
TC3146	SOC 855 – Notice To Recipient Of Provider Ineligibility	False	0	No	Yes	
TC3147	SOC 426A – Recipient Designation Of Provider Form	False	0	No	Yes	
TC3149	SOC 847 – Important Information For Prospective Providers About IHSS Enrollment	False	0	No	Yes	
TC3150	Targeted Mailing	False	0	No	Yes	
TC3151	SOC 404 – Recipient Direct Deposit Outreach Letter	False	0	No	Yes	
TC3152	SOC 829 – Enrollment/Change/Cancellation Form	False	0	No	Yes	
TC3153	EFT Bank Reject – Recipient	False	0	No	Yes	
TC3154	EFT Enrollment Prenote Reject – Recipient	False	0	No	Yes	
TC3155	EFT Bank Reject – Provider	False	0	No	Yes	
TC3156	EFT Enrollment Prenote Reject – Provider	False	0	No	Yes	
TC3126	Application/Assessment Package (295,426,332,827,293)	False	0	No	Yes	
TC3127	Provider Enrollment Package (847,332,426)	False	0	No	Yes	
TC3157	SOC 858 – Provider Notification	False	0	No	Yes	
TC3159	Change NOA with Slip Page	False	0	No	Yes	
TC3160	Health Care Certification Form	False	0	No	Yes	
TC3161	Individualized Back-Up Plan and Risk Assessment Form	False	0	No	Yes	
TC3162	Notice to Applicant of Health Care Certification Requirement Form	False	0	No	Yes	
TC3163	Termination NOA with Slip Page	False	0	No	Yes	
TC3164	Denial NOA with Slip Page	False	0	No	Yes	
TC3165	Multipurpose NOA with Slip Page	False	0	No	Yes	
TC3166	SOC NOA with Slip Page	False	0	No	Yes	
TC3167	Approval NOA with Slip Page	False	0	No	Yes	
TC3168	Time Sheet With Travel Time	False	0	No	Yes	
TC3169	Time Sheet Without Travel Time	False	0	No	Yes	
TC3170	FLSA Targeted Mailing	False	0	No	Yes	
TC3171	BVI Timesheet	False	0	No	Yes	
TC3175	Large Font IHSS Approval	False	0	No	Yes	
TC3176	Large Font IHSS Denial	False	0	No	Yes	
TC3177	Large Font IHSS Termination	False	0	No	Yes	
TC3178	Large Font IHSS Change	False	0	No	Yes	
TC3179	Large Font IHSS MultiPurpose	False	0	No	Yes	
TC3180	Large Font Share of Cost IHSS-R	False	0	No	Yes	
TC3181	SOC 295 – Application For Social Services – Large Font	False	0	No	Yes	
TC3182	FPO non Travel Time Sheet	False	0	No	Yes	
TC3183	SOC 2271A – Recipient Notification	False	0	No	Yes	
TC3184	SOC 2271 – Provider Notification	False	0	No	Yes	

TC3185	SOC 2271A - Recipient Notification With Gen 1365 (Multilingual)	False	0	No	Yes	
TC3186	Non Travel Time Sheet	False	0	No	Yes	
TC3187	SOC 2257 – First/Second OT Violation Provider	False	0	No	Yes	
TC3188	DHCS 2257 – IHSS/WPCS Notice to Provider First/Second Overtime Violation	False	0	No	Yes	
TC3189	SOC 2257A – First/Second OT Violation Recipient	False	0	No	Yes	
TC3190	DHCS 2257A – IHSS/WPCS Notice to Recipient of Provider's First/Second Violation	False	0	No	Yes	
TC3191	SOC2257B – Second OT Violation – Training not completed – Provider	False	0	No	Yes	
TC3192	DHCS 2257B – IHSS/WPCS Notice to Provider of Second Violation No Record of Completion of Review of Instructional Materials	False	0	No	Yes	
TC3193	SOC XXXX – Second OT Violation – Training not completed – Recipient	FALSE	0	No	No	
TC3194	WPCS 4 – Second OT Violation – Training not completed – Recipient	FALSE	0	No	No	
TC3195	SOC XXXX – Second OT Violation – Training Completed – Violation Removed – Provider	False	0	No	Yes	
TC3196	WPCS 5 – Second OT Violation – Training Completed – Violation Removed – Provider	False	0	No	Yes	
TC3197	SOC XXXX – Second OT Violation – Training Completed – Violation Removed – Recipient	False	0	No	Yes	
TC3198	WPCS 6 – Second OT Violation – Training Completed – Violation Removed – Recipient	False	0	No	Yes	
TC3199	SOC2263 – IHSS Program Notice to Provider Rescinding Violation	False	0	No	Yes	
TC3200	DHCS 2263 – IHSS/WPCS Notice to Provider Rescinding Violation	False	0	No	Yes	
TC3201	SOC2264 – IHSS Program Notice to Recipient Rescinding Provider Violation	False	0	No	Yes	
TC3202	DHCS 2264 – IHSS/WPCS Notice to Recipient Rescinding Provider Violation	False	0	No	Yes	
TC3203	SOC 2280 – IHSS Program Notice to Provider Upholding First or Second Violation	False	0	No	Yes	
TC3204	DHCS 2280 – IHSS/DHCS Notice to Provider Upholding First or Second Violation	False	0	No	Yes	
TC3205	SOC 2281 – IHSS Program Notice to Recipient Upholding Provider's First and Second Violation	False	0	No	Yes	
TC3206	DHCS 2281 – IHSS/WPCS Program Notice to Recipient Upholding Provider's First/Second Violation	False	0	No	Yes	
TC3207	SOC2258 – IHSS Program Notice to Provider of Third Overtime Violation	False	0	No	Yes	
TC3208	SOC2258A – IHSS Program Notice to Recipient of Provider's Third Overtime Violation	False	0	No	Yes	
TC3209	SOC2259 – IHSS Program Notice to Provider of Fourth Violation and Termination	False	0	No	Yes	
TC3210	SOC2259A – IHSS Program Notice to Recipient of Provider's Fourth Violation and Termination	False	0	No	Yes	
TC3211	SOC2265 – IHSS Program Notice to Provider Reduction in Total Violation Count	False	0	No	Yes	
TC3212	SOC 2272 – IHSS – Notice to Provider of Right to Dispute Violation for Exceeding Workweek and/or Travel Time Limits	False	0	No	Yes	
TC3213	SOC 2273 – IHSS State Administrative Review Request for Third or Fourth Violation for Exceeding Workweek and/or Travel Limits	False	0	No	Yes	
TC3214	SOC 2282 – IHSS Program Notice to Provider Upholding Third Violation	False	0	No	Yes	
TC3215	SOC 2283 – IHSS Program Notice to Recipient Upholding Provider's Third Violation	False	0	No	Yes	
TC3216	SOC 2284 – IHSS Program Notice to Provider Upholding Fourth Violation and Termination	False	0	No	Yes	
TC3217	SOC 2285 – IHSS Program Notice to Recipient Upholding Provider's Fourth Violation and Termination	False	0	No	Yes	
TC3218	SOC 2286 – IHSS State Administrative Review Response to Provider Upholding Third Violation	False	0	No	Yes	
TC3219	SOC 2287 – IHSS State Administrative Review Response to Recipient Upholding Provider's Third Violation	False	0	No	Yes	
TC3220	SOC 2288 – IHSS State Administrative Review Response to Provider Rescinding Third or Fourth Violation	False	0	No	Yes	

TC3221	SOC 2289 – IHSS State Administrative Review Response to Recipient Rescinding Provider's Third or Fourth Violation	False	0	No	Yes	
TC3222	SOC 2290 – IHSS State Administrative Review Response to Provider Upholding Fourth Violation	False	0	No	Yes	
TC3223	SOC 2291 – IHSS State Administrative Review Response to Recipient Upholding Provider's Fourth Violation	False	0	No	Yes	
TC3224	IHSS Second Violation Self-Certification Training	False	0	No	Yes	
TC3225	DHCS Second Violation Self-Certification Training	False	0	No	Yes	
TC3226	DHCS 2258 – IHSS/WPCS Notice to Provider of Third Violation	False	0	No	Yes	
TC3227	DHCS 2258A – IHSS/WPCS Notice to Recipient of Provider's Third Overtime Violation	False	0	No	Yes	
TC3228	DHCS 2259 – IHSS/WPCS Notice to Provider of Fourth Violation	False	0	No	Yes	
TC3229	DHCS 2259A – IHSS/WPCS Notice to Recipient of Provider's Fourth Violation	False	0	No	Yes	
TC3230	DHCS 2265 – IHSS/WPCS Notice to Provider Reduction in total Violation Count	False	0	No	Yes	
TC3231	DHCS 2272 – IHSS/WPCS Notice to Provider of Right to Dispute Violation For Exceeding Workweek and/or Travel Time Limits	False	0	No	Yes	
TC3232	DHCS 2273 – DHCS State Administrative Review Request for Third or Fourth Violation	False	0	No	Yes	
TC3233	DHCS 2282 – IHSS/WPCS Notice to Provider Upholding Third Violation	False	0	No	Yes	
TC3234	DHCS 2283 – IHSS/WPCS Notice to Recipient Upholding Provider's Third Violation	False	0	No	Yes	
TC3235	DHCS 2284 – IHSS/WPCS Notice to Provider Upholding Fourth Violation	False	0	No	Yes	
TC3236	DHCS 2285 – IHSS/WPCS Notice to Recipient Upholding Provider's Fourth Violation	False	0	No	Yes	
TC3241	SOC 2266 – Approval of One-Time Flexible Hours – Recipient	False	0	No	Yes	
TC3242	SOC 2266A – Approval of One-Time Flexible Hours – Provider	False	0	No	Yes	
TC3243	SOC 2267 – Denial of Flexible Hours – Recipient	False	0	No	Yes	
TC3244	SOC 2267A – Denial of Flexible Hours – Provider	False	0	No	Yes	
TC3245	SOC 2268 – Approval of On-Going Flexible Hours – Recipient	False	0	No	Yes	
TC3246	SOC 2268A – Approval of On-Going Flexible Hours – Provider	False	0	No	Yes	
TC3247	SOC 2269 – Cancellation of On-Going Flexible Hours – Recipient	False	0	No	Yes	
TC3248	SOC 2269A – Cancellation of On-Going Flexible Hours - Provider	False	0	No	Yes	
TC3249	DHCS 2266 – WPCS Recipient Approval Exception to Exceed Weekly Hours	False	0	No	Yes	
TC3250	DHCS 2266A – WPCS Provider Approval of Exception to Exceed Weekly Hours	False	0	No	Yes	
TC3251	DHCS 2267 – WPCS Notice to Recipient Denial of Exception to Exceed Weekly Hours	False	0	No	Yes	
TC3252	DHCS 2267A – WPCS Notice to Provider Denial Exception to Exceed Weekly Hours	False	0	No	Yes	
TC3253	DHCS 2268 – WPCS Recipient Approval of Alternate Work Schedule for Recurring Event	False	0	No	Yes	
TC3254	DHCS 2268A – WPCS Provider Approval of Alternate Work Schedule for Recurring Event	False	0	No	Yes	
TC3255	DHCS 2269 – WPCS Notice to Recipient Cancellation of Alternate Work Schedule for Recurring Need	False	0	No	Yes	
TC3256	DHCS 2269A – WPCS Notice to Provider Cancellation of Alternate Work Schedule for Recurring Event	False	0	No	Yes	
TC3257	SOC 2270 – Notice to Recipient Failure to Complete Workweek Agreement	False	0	No	Yes	
TC3258	SOC 2270A – Notice to Provider Failure to Complete Workweek Agreement	False	0	No	Yes	
TC3259	DHCS 2270 – WPCS DHCS Notice to Recipient Failure to Complete Workweek Agreement	False	0	No	Yes	
TC3260	DHCS 2270A – WPCS DHCS Notice to Provider Failure to Complete Workweek and Travel Agreement	False	0	No	Yes	
TC3261	Above Auth Hours Recipient Letter	False	0	No	Yes	
TC3262	Above Auth Hours Recipient Letter With Gen 1365 (Multilingual)	False	0	No	Yes	

TC3263	Above Auth Hours Provider Letter	False	0	No	Yes	
TC3264	Advance Pay Earnings Statement	False	0	No	Yes	
TC3270	DHCS 2286 – State Administrative Review Notice to Provider Upholding Third Violation	False	0	No	Yes	
TC3271	DHCS 2287 – State Administrative Review Notice to Recipient Upholding Provider's Third Violation	False	0	No	Yes	
TC3272	DHCS 2288 – State Administrative Review Request Response to Provider Letter Rescinding Third or Fourth Violation	False	0	No	Yes	
TC3273	DHCS 2289 – State Administrative Review Request Response to Recipient Letter Rescinding Provider's Third or Fourth Violation	False	0	No	Yes	
TC3274	DHCS 2290 – State Administrative Review Notice to Provider Upholding Fourth Violation	False	0	No	Yes	
TC3275	DHCS 2291 – State Administrative Review Notice to Recipient Upholding Provider's Fourth Violation	False	0	No	Yes	
TC3276	SOC 2298 – Live-In Self-Certification Form for IRS Federal Tax Wage Exclusion	False	0	No	Yes	
TC3277	SOC 2299 – Live-In Self-Certification Cancellation Form for IRS Federal Tax Wage Exclusion	False	0	No	Yes	
TC3278	DSD FORM CMIPS 0003 - Recipient Confirmation of Changes or Enrollment in ESP or TTS	False	0	No	Yes	Previously SOC 2301
TC3279	SOC 876 – Notice of Provisional Approval Health Care Certification Exception Granted	False	0	No	Yes	
TC3280	SOC2257C – IHSS/WPCS Notice to Provider Second OT Violation – Training Completed	False	0	No	Yes	
TC3281	TBD Agile 2 team, CR 1313 Sprint 16	N/A	N/A	N/A	N/A	Will be updated with DSD Updates for Release 1.20.
TC3282	SOC 829 – Enrollment/Change/Cancellation Form and SOC 831 – Provider Direct Deposit Outreach Letter	False	0	No	Yes	
TC3283	SOC 2321 – IHSS/WPCS Notice to Recipient Confirmation of Inactivation In ETS	False	0	No	Yes	
TC3284	SOC 851A - Notice To Applicant Provider Of Incomplete Provider Process 15-Day Notification	False	0	No	Yes	
TC3285	SOC 846 - Provider Enrollment Agreement	False	0	No	Yes	
TC3286	CMIPS 0002 - EVV TTS - Provider Registration Code Letter	False	0	No	Yes	
TC3287	CMIPS 0001 - EVV TTS - Recipient Registration Code Letter	False	0	No	Yes	
TC3284	SOC 851A – Notice To Applicant Provider Of Incomplete Provider Process 15-Day Notification	False	0	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Communication Type

CI	Document Name
CI-637076 - DSD CT Communication Type IMPLEMENTED	DSD_CT_Communication_Type.docx

Table – Code Table: CommunicationType

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
FBRTC101	Forms Main Application	False	0	No	Yes	
FBRTC102	Timesheet	False	0	No	Yes	
FBRTC103	Share of Cost Letter	False	0	No	Yes	
FBRTC104	Notice of Action	False	0	No	Yes	
FBRTC105	Other Forms	False	0	No	Yes	
FBRTC106	Provider Forms	False	0	No	Yes	
FBRTC107	Help Desk Forms	False	0	No	Yes	
FBRTC108	Other Forms At HP Print	False	0	No	Yes	
FBRTC109	Provider Notification	False	0	No	Yes	
FBRTC110	Conversion Forms	False	0	No	Yes	
FBRTC111	Violation Forms	False	0	No	Yes	
FBRTC112	Flexible Hours Forms	False	0	No	Yes	
FBRTC113	Above Authorized Hours Forms	False	0	No	Yes	
FBRTC114	Advance Pay Earning Statement	False	0	No	Yes	
FBRTC115	ETS Forms	False	0	No	Yes	
FBRTC116	Electronic Visit Verification Forms	False	0	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Time Sheet Letter Type

CI	Document Name
CI-674839 - DSD CT Timesheet Letter Types IMPLEMENTED	DSD_CT_Timesheet_Letter_Types.docx

Table – Code Table: TimesheetLetterType

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
TLT001	Recipient Letter	No	1	No	No	Letter Type code for Recipient
TLT002	Provider Letter	No	1	No	No	Letter Type code for Provider

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Calendar Month

CI	Document Name
CI-675656 - DSD CT Flexible Hours Status IMPLEMENTED	DSD_CT_Calendar_Month.docx

Table – Code Table: CalendarMonth

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CM01	January	No	1	No	Yes	
CM02	February	No	2	No	Yes	
CM03	March	No	3	No	Yes	
CM04	April	No	4	No	Yes	
CM05	May	No	5	No	Yes	
CM06	June	No	6	No	Yes	
CM07	July	No	7	No	Yes	
CM08	August	No	8	No	Yes	
CM09	September	No	9	No	Yes	
CM10	October	No	10	No	Yes	
CM11	November	No	11	No	Yes	
CM12	December	No	12	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Flexible Hours Frequency

CI	Document Name
 CI-675657 - DSD CT Calendar Month IMPLEMENTED	DSD_CT_Flexible_Hours_Frequency.docx

Table – Code Table: FlexibleHoursFrequency

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
FHF001	One-Time	No	1	No	Yes	
FHF002	On-Going	No	2	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Flexible Hours Status

CI	Document Name
 CI-675658 - DSD CT Flexible Hours Frequency IMPLEMENTED	DSD_CT_Flexible_Hours_Status.docx

Table – Code Table: FlexibleHoursStatus

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
FHS001	Pending	No	1	No	Yes	
FHS002	Active – Approved	No	2	No	Yes	
FHS003	Active – Denied	No	3	No	Yes	
FHS004	Inactive	No	4	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/UHV Status

CI	Document Name
 CI-718157 - DSD CT UHV Status IMPLEMENTED	DSD_CT_UHV_Status.docx

Table – Code Table: UHV Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
UHV01	Outcome Pending	No	1	No	Yes	
UHV02	Initial UHV Attempt Successful	No	2	No	Yes	
UHV03	Initial UHV Attempt Unsuccessful	No	3	No	Yes	
UHV04	Follow-up Letter Sent	No	4	No	Yes	
UHV05	Follow-up Phone Call Made	No	5	No	Yes	
UHV06	Follow-up UHV Attempt Successful	No	6	No	Yes	
UHV07	Follow-up UHV Attempt Unsuccessful	No	7	No	Yes	
UHV08	Further Follow-up Letter Sent	No	8	No	No	
UHV09	Final Phone Call Made	No	9	No	Yes	
UHV10	Final UHV Attempt Successful	No	10	No	Yes	
UHV11	Final UHV Attempt Unsuccessful	No	11	No	Yes	
UHV12	UHV Non-Compliance, Recipient Terminated	No	12	No	No	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/UHV Mandatory Follow-up

CI	Document Name
 CI-718158 - DSD CT UHV Mandatory Follow-up IMPLEMENTED	DSD_CT_UHV_Mandatory_Follow-up.docx

Table – Code Table: UHV Mandatory Follow-up

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
HVFT01	Follow-up Letter	No	1	No	Yes	
HVFT02	Follow-up Phone Call-I	No	2	No	Yes	
HVFT03	Follow-up Home Visit Attempt	No	3	No	Yes	
HVFT04	Follow-up Phone Call-II	No	4	No	Yes	
HVFT05	Final Home Visit Attempt	No	5	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/E-Timesheet Option

CI	Document Name
 CI-753341 - DSD CT E Timesheet Option CANCELLED	DSD_CT_E_Timesheet_Option.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification](#).

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/E-Timesheet Stopped By

CI	Document Name
 CI-753339 - DSD CT E Timesheet Stopped By CANCELLED	DSD_CT_E_Timesheet_Stopped_By.docx

Cancelled by [CR115 CGI M&O – PSR – EVV Simplification.](#)

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/IHSS Website Status

CI	Document Name
 CI-795505 - DSD CT IHSS Website Status IMPLEMENTED	DSD_CT_IHSS_Website_Status.docx

Table – Code Table: IHSS Website Status

Code Value	Code Description	Default Value	Sort Order	Enabled	Translated
IWPS001	Active	No	N/A	Yes	No
IWPS002	Inactive	No	N/A	Yes	No
IWPS003	Reactivated	No	N/A	Yes	No
IWPS004	No	No	N/A	Yes	No

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EVV Print Options

CI
 CI-819055 - DSD CT EVVPrintOptions IMPLEMENTED

Table – Code Table: EVVPrintOptions

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
EVVPO001	Print in Nightly Batch	True	1	No	Yes	
EVVPO002	Print Now on CMIPS Printer	True	2	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/TTSAccomodations

CI
 CI-822202 - DSD CT TTS Accommodations CANCELLED

Cancelled by CR115 - EVV Simplification

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EVVEnrollmentStatus

CI
 CI-819071 - DSD CT EVVEnrollment Status CANCELLED

Cancelled by CR115 - EVV Simplification

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EVV Exception Status

CI
 CI-822681 - DSD CT EVVExceptionStatus IMPLEMENTED

Table – Code Table: EVVExceptionStatus

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
EVES01	Approved	No	1	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Notification Preference

CI	Document Name
 CI-823087 - DSD CT Notification Preference IMPLEMENTED	DSD_CT_Notification_Preference.docx

Table – Code Table: NotificationPreference

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
NP01	Email		0	No	Yes	
NP02	Text		0	No	Yes	
NP03	Both		0	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Text Message Content

CI	Document Name
CI-823093 - DSD CT ETS Text Message Content IMPLEMENTED	DSD_CT_ETS_Text_Message_Content.docx

Table – Code Table: ETSTextMessageContent

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
TM06EN01	TBD		1	No	Yes	
TM06ES01	TBD		1	No	Yes	
TM06HY01	TBD		1	No	Yes	
TM06ZH01	TBD		1	No	Yes	
TM07EN01	TBD		1	No	Yes	
TM07ES01	TBD		1	No	Yes	
TM07HY01	TBD		1	No	Yes	
TM07ZH01	TBD		1	No	Yes	
TM08EN01	TBD		1	No	Yes	
TM08ES01	TBD		1	No	Yes	
TM08HY01	TBD		1	No	Yes	
TM08ZH01	TBD		1	No	Yes	
TM11EN01	TBD		1	No	Yes	
TM11EN02	TBD		1	No	Yes	
TM11ES01	TBD		1	No	Yes	
TM11ES02	TBD		1	No	Yes	
TM11HY01	TBD		1	No	Yes	
TM11HY02	TBD		1	No	Yes	
TM11ZH01	TBD		1	No	Yes	
TM11ZH02	TBD		1	No	Yes	
TM15EN01	TBD		1	No	Yes	
TM15ES01	TBD		1	No	Yes	
TM15HY01	TBD		1	No	Yes	
TM15ZH01	TBD		1	No	Yes	
TM49EN01	TBD		1	No	Yes	
TM49ES01	TBD		1	No	Yes	
TM49HY01	TBD		1	No	Yes	
TM49ZH01	TBD		1	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Upload Case Forms

CI	Document Name
 CI-823246 - DSD CT Upload Case Forms IMPLEMENTED	DSD_CT_Upload_Case_Forms.docx

Table: Code Table: UploadCaseForms

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CR 6181	CR 6181 - Interpreter Services Statement and Confidentiality Agreement	No	1	No	Yes	
SOC295 / SOC295L	SOC 295/SOC 295L - Application for Social Services	No	2	No	Yes	
SOC321	SOC 321- Request for Order and Consent – Paramedical Services	No	3	No	Yes	
SOC332 / SOC332L	SOC 332/SOC 332L - Recipient/Employer Responsibility Checklist	No	4	No	Yes	
SOC426A	SOC 426A - Recipient Designation of Provider	No	5	No	Yes	
SOC450	SOC 450 - Voluntary Services Certification	No	6	No	Yes	
SOC821	SOC 821 - Assessment of Need for Protective Supervision	No	7	No	Yes	
SOC825	SOC 825 - Protective Supervision – 24-Hours-A-Day Coverage Plan	No	8	No	Yes	
SOC838	SOC 838 - IHSS Recipient Request For Assignment of Authorized Hours For Provider	No	9	No	Yes	
SOC839	SOC 839 - IHSS Designation of Authorized Representative	No	10	No	Yes	
SOC839A	SOC 839A - IHSS Cancellation of Authorized Representative	No	11	No	Yes	
SOC839B	SOC 839B - IHSS Cancellation of Authorized Representative/TPRD Signatory	No	12	No	Yes	
SOC864	SOC 864 - Individualized Back-Up Plan and Risk Assessment	No	13	No	Yes	
SOC873 / SOC873L	SOC 873/SOC 873L - Health Care Certification Form	No	14	No	Yes	
NVRA	NVRA Voter Registration Form	No	15	No	Yes	
IEP	Individualized Education Plan (IEP)	No	16	No	Yes	
IPP	Individualized Program Plan (IPP)	No	17	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/Upload Forms Status

CI
 CI-823410 - DSD CT Upload Forms Status IMPLEMENTED

Code Table: UploadStatus

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
AS01	Uploaded	No	1	No	Yes	
AS02	Scan Failed	No	2	No	Yes	
AS03	Pending Scan	No	3	No	Yes	
AS04	Archived	No	4	No	Yes	
AS05	Pending Delete	No	5	No	Yes	
AS06	Deleted	No	6	No	Yes	
AS07	Archived Failed Scan	No	7	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Code Table Definitions/EForm Record Status

CI
 CI-823723 - DSD CT EForm Record Status IMPLEMENTED

Table – Code Table: EFormRecordStatus

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
EFORM001	Pending	Yes	1	No	Yes	
EFORM002	Sent	No	2	No	Yes	
EFORM003	Ready For Review	No	3	No	Yes	
EFORM004	Accepted	No	4	No	Yes	
EFORM005	Rejected	No	5	No	Yes	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities

This section will describe the database entities that will be required to support the screen designs. These database entities will be extracted from the COTS database models.

Primary Key:

A primary key is a field or combination of fields that uniquely identify a record in a table, so that an individual record can be located without confusion.

Foreign Key:

A foreign key (sometimes called a referencing key) is a key used to link two tables together. Typically you take the primary key field from one table and insert it into the other table where it becomes a foreign key (it remains a primary key in the original table).

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Appeal

Table – Table Name – CaseAppeal

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
appealNumber	CHARACTER	20	Yes	Create State Hearing – Number	The number associated with the State Hearing.
hearingDate	DATE	4	Yes	Create State Hearing – Scheduled Hearing Date	The date of the State Hearing.
rescheduledReason	CHARACTER	10	Yes	Create State Hearing – Rescheduled Reason	A comment describing the hearing.
complianceFormSentDate	DATE	4	Yes	Create State Hearing – Compliance Form Sent Date	The date that the Compliance form was sent.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Appeal Hearing History

Table - Table Name – CaseAppealHearingHistory

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
caseAppealHearingHistoryID	BIGINT	8	No		The primary key.
appealId	BIGINT	8	Yes		The foreign key to the CaseAppeal table.
hearingDate	DATE	4	Yes	Create/Modify State Hearing – Scheduled Hearing Date	The date of the State Hearing.
rescheduledReason	CHARACTER	50	Yes	Create/Modify State Hearing – Rescheduled Reason	A comment describing the hearing.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case WPCS Hours

Table – Table Name – CaseWPCSHours

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
caseWpcsHoursID	BIGINT	8	No		The primary key of the table.
caseID	BIGINT	8	Yes		The foreign key for CaseHeader.
wpcsHoursMin	INTEGER	4	No	Create WPCS Hours – WPCS Hours	The WPCS hours that are authorized on the case measured in minutes.
fromDate	DATE	4	Yes	Create WPCS Hours – Start Date	The date the authorization begins.
toDate	DATE	4	Yes	Create WPCS Hours – End Date	The date the authorization ends.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Workplace Hours

Table – Table Name – CaseWorkplaceHours

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
caseWorkplaceHoursID	BIGINT	8	No		The primary key.
caseID	BIGINT	8	Yes		The foreign key for CaseHeader.
hoursMin	INTEGER	4	No	Workplace Hours – Workplace Hours	The number of hours recorded in minutes that were provided in the workplace during the period.
fromDate	DATE	4	Yes	Workplace Hours – Start Date	The begin date of the period.
toDate	DATE	4	Yes	Workplace Hours – End Date	The end date the period.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Inter-County Transfer

Table – Table Name – InterCountyTransfer

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
intercountyTransferID	BIGINT	8	No		The primary key.
caseID	BIGINT	8	No		Foreign key for CaseHeader.
sendingCountyNotifiedDate	DATE	4	Yes	Create Inter-County Transfer – Sending County Notified	The date the sending County was notified of the intended move.
receivingCountyCode	CHARACTER	10	Yes	Create Inter-County Transfer – Receiving County	The County where the Recipient intends to move.
receivingCountyNotifiedDate	DATE	4	Yes	View Inter-County Transfer – Receiving County Notified	The date the receiving County was notified of the intended move.
newAddressID	BIGINT	8	Yes	Create Inter-County Transfer – New Address	The Recipient's new address in the receiving County.
newPhoneNumberID	BIGINT	8	Yes	Create Inter-County Transfer – New Phone Number	The Recipient's new phone number in the receiving County.
moveDate	DATE	4	Yes	Create Inter-County Transfer – Date Of Move	The Recipient's intended date of move.
ictStatusCode	CHARACTER	10	Yes	View Inter-County Transfer - Status	The current status of the Inter-County Transfer.
assignedUsername	CHARACTER	30	No	Modify Inter-County Transfer – Assigned Worker	Assigned Social Worker in the receiving County.
transferDate	DATE	4	Yes	View Inter-County Transfer – Transfer Date	The date the case was authorized in the receiving County which changes the case ownership.
cancelDate	DATE	4	Yes	View Inter-County Transfer – Cancel Date	The date on which the Recipient's Inter-County Transfer was cancelled.
sendingCountyCode	CHARACTER	10	Yes	Create Inter-County Transfer – Receiving County	The County where the Recipient is moving from.
authorizedStartDate	DATE	4	Yes	View Inter-County Transfer – Authorized Start Date	Authorization start date after Inter-County Transfer was completed.
sendingcountyusername	CHARACTER	30	Yes	Create Inter-County Transfer – Sending County User Name	The sending county user name.
sendingcountydistrictOfficeNo	CHARACTER	2	Yes	Create Inter-County Transfer – Sending County District Office Number	The sending county district office number.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Homemaker Timesheet

Table – Table Name – HomemakerTimesheet

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
homemakerTimesheetID	BIGINT	8	No		The primary key.
serviceMonth	DATE	4	Yes	Create Homemaker Timesheet – Select Month & Year	The date of the first day in the month that service was provided.
homemakerUserName	CHARACTER	30	Yes		The foreign key to the Users table for the homemaker user that is submitting this timesheet.
countyCode	CHARACTER	10	Yes		The two (2) digit numeric code for the California County.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Homemaker Timesheet Details

Table – Table Name – HomemakerTimesheetDetail

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
homemakerTimesheetDetailID	BIGINT	8	No		The primary key.
homemakerTimesheetID	BIGINT	8	No		The foreign key to the HomemakerTimesheet table.
caseServiceMonthID	BIGINT	8	No		The foreign key to the CaseServiceMonth table.
hoursMin	INTEGER	4	No	View Homemaker Timesheets – Hours	The number of hours recorded in minutes that were provided by the homemaker.
approvalStatusCode	CHARACTER	10	Yes		The status of the approval for the hours that the homemaker has submitted for the case.
approvalRequestID	BIGINT	8	Yes		Unique reference number of the approval request record which was created for the approval in Approval Request table.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/County Contractor (CC) Invoice

Table – Table Name – CountyContractorInvoice

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
countyContractorInvoiceID	BIGINT	8	No		The primary key.
countyContractorID	BIGINT	8	No		The foreign key to the CountyContractor table.
invoiceNumber	CHARACTER	6	Yes	Modify County Contractor – Invoice Number	County Contractor Invoice Number.
invoiceDate	DATE	4	Yes	Modify County Contractor - InvoiceDate	County Contractor Invoice Date.
servicePeriod	CHARACTER	10	Yes		(A,B,C) First half, second half, full month.
processedDate	DATE	4	Yes	Modify County Contractor – Processed Date	The date the invoice was processed in CMIPS.
billRate	DECIMAL	31	No		The rate that the contractor has billed on the invoice.
billingMonth	DATE	4	Yes	Modify County Contractor – Billing Month	Month in which the invoice was billed.
originalAmt	DECIMAL	31	No	Modify County Contractor – Original Amount	Original amount of invoice.
rejectedAmt	DECIMAL	31	No	Modify County Contractor – Rejected Amount	Amount rejected from billing due to errors.
cutBackAmt	DECIMAL	31	No	Modify County Contractor – Cut Back Amount	Amount cut back due to erroneous billing.
socCollectedAmt	DECIMAL	31	No	Modify County Contractor – SOC Collected Amount	Share of Cost Collected Amount collected by the contractor from the IHSS Recipient.
authorizedAmt	DECIMAL	31	No	Modify County Contractor – Authorized Amount	The Amount authorized to be paid to the contractor minus Rejections, Cut Backs and SOC amounts.
warrantNumber	CHARACTER	30	Yes	Modify County Contractor – Warrant #	An external warrant number unrelated to the CMIPS Warrant table that is user-entered.
paidDate	DATE	4	Yes	Modify County Contractor – Paid Date	The date the warrant was issued to the County Contractor.
communicationID	BIGINT	8	Yes		The foreign key to the Communication table.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/CC Invoice Details

Table – Table Name – CCInvoiceDetails

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
ccInvoiceDetailsID	BIGINT	8	No		The primary key.
countyContractorInvoiceID	BIGINT	8	No		The foreign key to the CountyContractorInvoice table.
caseCount	INTEGER	4	No	Modify County Contractor – Case Count	The rolled up number of cases for the funding source and month.
fundingAidCode	CHARACTER	10	Yes	Modify County Contractor – Funding Source	The funding source determined for the Recipient (WPCS, IHSS-R, PCSP, IPW1, IPW2-6, IPO 1-5, CFCO).
serviceMonth	DATE	4	Yes	Modify County Contractor – Service Month	The data of the first day in the month that service was provided.
Amount	DECIMAL	31	No	Modify County Contractor – Amount	The rolled up amount for the funding source and month.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Status Rescind

Table – Table Name – CaseStatusRescind

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
caseStatusRescindID	BIGINT	8	No		The primary key.
beforeRescindCaseStatusID	BIGINT	8	Yes		The foreign key for status.
afterRescindCaseStatusID	BIGINT	8	Yes		The foreign key for status.
rescindDate	DATE	4	Yes		Date when case was rescinded.
rescindReson	CHARACTER	10	Yes		Rescind Reason selected by user from screen.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case Leave

Table – Table Name – CaseLeave

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
caseLeaveID	BIGINT	8	No		The primary key.
caseStatusID	BIGINT	8	Yes		The foreign key for status.
resourceSuspensionEndDate	DATE	4	Yes	Leave Case – Resource Suspension End Date	Date when the case was initiated for leave.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Unannounced Home Visit

Table – Table Name – UnannouncedHomeVisit

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
caseID	BIGINT	8	No	System Generated	Foreign Key for CaseHeader
unannouncedHomeVisitID	BIGINT	8	No	System Generated	Primary Key for UnannouncedHomeVisit
homeVisitDate	DATE	4	Yes	Unannounced Home Visit – Home Visit Date	The date of the unannounced home visit
reasonCode	CHARACTER	10	Yes	Unannounced Home Visit – Reason	The reason for the unannounced home visit
outcomeCode	CHARACTER	10	Yes	Unannounced Home Visit – Outcome	The outcome of the unannounced home visit
visitFocusCode	CHARACTER	10	Yes	Unannounced Home Visit – Visit Focus	The focus of the unannounced home visit
ProviderID	BIGINT	8	Yes	System assigned based on user selection of the Provider	Foreign Key for Provider

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Medi-cal Eligibility Information

Table – Table Name – MediCalEligInfo

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
mediCalEligInfolD	BIGINT	8	No	System Generated	Primary key for MediCalEligInfo
caseID	BIGINT	8	Yes	System Generated	Foreign key for CaseHeader
receivedDate	DATE	4	Yes	N/A	The date the last Medi-Cal Eligibility update was applied
medsName	CHARACTER	18	Yes	N/A	MEDS Name
medsCIN	CHARACTER	9	Yes	MEDS Eligibility Information – CIN	MEDS CIN
cinCheckDigit	INTEGER	1	No	MEDS Eligibility Information – CIN Check Digit	CIN check Digit
ssnVerificationCode	CHARACTER	10	Yes	MEDS Eligibility Information – SSN Verification Code	SSN Verification Code
medsBirthDate	DATE	4	Yes	MEDS Eligibility Information – MEDS Date of Birth	Birth day in MEDS
birthDateValidationCode	CHARACTER	10	Yes	N/A	Birth Date Validation
ssaBirthDate	DATE	4	Yes	N/A	Birth day in SSA
residenceAddress	CHARACTER	150	Yes	N/A	Residence Address
residenceCountyCode	CHARACTER	10	Yes	N/A	The two digit numeric code for the California county.
deathDate	DATE	4	Yes	MEDS Eligibility Information – Date of Death	Date of Death
deathSourceCode	CHARACTER	10	Yes	MEDS Eligibility Information – Death Source	Death Source
authorizedRep	CHARACTER	36	Yes	N/A	Name of Authorized Representative
authorizedRepAddress	CHARACTER	150	Yes	N/A	Authorized Rep Address
alienStatusCode	CHARACTER	10	Yes	MEDS Eligibility Information – Refugee Alien Status	Refugee Alien Status
insEntryDate	DATE	4	Yes	MEDS Eligibility Information – INS Date of Entry	INS Date Of Entry
citizenshipDocumentTypeCode	CHARACTER	10	Yes	MEDS Eligibility Information – Citizenship Document Type	Citizenship Document Type
identityDocumentTypeCode	CHARACTER	10	Yes	MEDS Eligibility Information – Identity Document Type	Identity Document Type
medsAppellation	CHARACTER	10	Yes	N/A	MEDS Appellation
spokenLanguageCode	CHARACTER	10	Yes	N/A	Language
writtenLanguageCode	CHARACTER	10	Yes	N/A	Language
medsCountyCode	CHARACTER	10	Yes	MEDS Eligibility Information – MEDS County Code	The two digit numeric code for the California county.
medicareStatusCode	CHARACTER	10	Yes	N/A	Medicare Status
mediCalPrimaryEligStatusCode	CHARACTER	10	Yes	MEDS Eligibility Information – Medi-Cal Primary Eligibility Status	Medi-Cal Primary eligibility status
primaryEligTermDate	DATE	4	Yes	N/A	Primary Eligibility Term Date

primaryEligTermReasonCode	CHARA CTER	10	Yes	N/A	Primary Eligibility Term Reason
Serial	CHARA CTER	7	Yes	MEDS Eligibility Information – Serial	Serial
bicIssueDate	DATE	4	Yes	MEDS Eligibility Information – BIC Issue Date	BIC Issue Date
ewCode	CHARA CTER	10	Yes	N/A	Medi-Cal Eligibility Worker Code
districtOffice	CHARA CTER	3	Yes	N/A	District Office
otherHealthCoverStatusCode	CHARA CTER	10	Yes	N/A	Other Health Coverage Status
otherHealthCoverSourceCode	CHARA CTER	10	Yes	N/A	Other Health Coverage Source
rvDueMonth	DATE	4	Yes	MEDS Eligibility Information – RV Due Month	Medi-Cal RV Due Month
lastRVCompletedDate	DATE	4	Yes	MEDS Eligibility Information – Last RV Complete Date	Last Medi-Cal RV Completed Date
mediCalDenialDate	DATE	4	Yes	MEDS Eligibility Information – Medi-Cal Denial Date	Date Medi-Cal was Denied
mediCalDenialReasonCode	CHARA CTER	10	Yes	MEDS Eligibility Information – Medi-Cal Denial Reason	Medi-Cal Denial Reason
ssiDistrictOffice	CHARA CTER	3	Yes	N/A	SSI District Office
ssiPayStatusCode	CHARA CTER	10	Yes	N/A	SSI Pay Status
ssiPayStatusDate	DATE	4	Yes	N/A	SSI Pay Status Date
ssiLivingArrangementCode	CHARA CTER	10	Yes	N/A	SSI Living Arrangement
optionalLivingArrangeCode	CHARA CTER	10	Yes	MEDS Eligibility Information – Optional Living Arrangement	Optional Living Arrangement
healthInsuranceCoverageInd	CHARA CTER	1	No	N/A	Health Insurance Coverage
insuranceEntryDate	DATE	4	Yes	N/A	Insurance Entry Date
applicationTypeCode	CHARA CTER	10	Yes	N/A	Application Type
applicationDate	DATE	4	Yes	MEDS Eligibility Information – Application Date	Application Date
restrictionCode	CHARA CTER	10	Yes	N/A	Restriction
disabilityOnsetDate	DATE	4	Yes	MEDS Eligibility Information – Disability Onset Date	Disability Onset Date
mediCalEligibilityMonthDate	DATE	4	Yes	MEDS Eligibility Information – Eligibility Month /Year	Medi-Cal Eligibility Month
medsIDNumber	CHARA CTER	9	Yes	MEDS Eligibility Information – MEDS ID	Medi-Cal Identification
mediCalSOC	DECIMAL	31	No	MEDS Eligibility Information – Medi-Cal SOC	Medi-Cal Share of Cost
mediCalCaseNumber	CHARA CTER	11	Yes	MEDS Eligibility Information – Medi-Cal County ID	Medi-Cal Case Number
ffpInd	CHARA CTER	1	No	MEDS Eligibility Information – FFP	Indicates whether or not (Y/N) the individual is Federal Financial Participation (FFP) eligible for the Medi-Cal Eligibility Month. This value is populated from MEDS.
mediCalEligibilityStatus	CHARA CTER	10	Yes	N/A	Medi-Cal Eligibility Status
mediCalAidCode	CHARA CTER	10	Yes	MEDS Eligibility Information – MEDS Aid Code	Medi-Cal Aid Code
updateTypeCode	CHARA CTER	10	Yes	MEDS Eligibility Information – Type	Type of update applied

ihssEligibilityStatus	CHARACTER	10	Yes	N/A	IHSS Eligibility Status is same as Medi-Cal Eligibility status
ihssCountyId	CHARACTER	14	Yes	N/A	IHSS County ID
primaryCountyId	CHARACTER	14	Yes	Medi-Cal Eligibility Information – County Person Number and Medi-Cal Eligibility Information – County FBU	Primary County ID
priorSocAmount	DECIMAL	31	No	N/A	Prior SOC Amount
ihssSocAmount	DECIMAL	31	No	N/A	IHSS SOC Amount
primaryLeRvCountyId	CHARACTER	14	Yes	N/A	Primary LeRv County ID
applicationFlag	CHARACTER	1	Yes	N/A	Application Flag
refugeeAlienIndicator	CHARACTER	1	Yes	N/A	Refugee Alien Indicator
hcpCountyCode	NUMERIC	2	Yes	View Medi-Cal Eligibility – Health Care Plan information cluster – Plan County (County Name)	HCP County Code
hcpCode	CHARACTER	3	Yes	View Medi-Cal Eligibility – Health Care Plan information cluster – Plan Code	HCP Plan Code
hcpStat	CHARACTER	2	Yes	View Medi-Cal Eligibility – Health Care Plan information cluster – Plan Status	HCP Plan Status
CreateBy	CHARACTER	30	Yes	N/A	Audit Field
CreateOn	TIMESTAMP	8	Yes	N/A	Audit Field
LastUpdateBy	CHARACTER	30	Yes	N/A	Audit Field
LastUpdatedOn	TIMESTAMP	8	Yes	N/A	Audit Field
VersionNo	INTEGER	1	No	N/A	Audit Field

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Medi-Cal Eligibility Information Snapshot

Table – Table Name – MediCalEligInfoSnapshot

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
mediCalEligInfolDSnapshot	BIGINT	8	No	System Generated	Primary key for MediCalEligInfoSnapshot
mediCalEligInfolD	BIGINT	8	Yes	System Generated	Primary key for MediCalEligInfo
caseID	BIGINT	8	Yes	System Generated	Foreign key for CaseHeader
receivedDate	DATE	4	Yes	N/A	The date the last Medi-Cal Eligibility update was applied
medsName	CHARACTER	18	Yes	N/A	MEDS Name
medsCIN	CHARACTER	9	Yes	MEDS Eligibility Information – CIN	MEDS CIN
cinCheckDigit	INTEGER	1	No	MEDS Eligibility Information – CIN Check Digit	CIN check Digit
ssnVerificationCode	CHARACTER	10	Yes	MEDS Eligibility Information – SSN Verification Code	SSN Verification Code
medsBirthDate	DATE	4	Yes	MEDS Eligibility Information – MEDS Date of Birth	Birth day in MEDS
birthDateValidationCode	CHARACTER	10	Yes	N/A	Birth Date Validation
ssaBirthDate	DATE	4	Yes	N/A	Birth day in SSA
residenceAddress	CHARACTER	150	Yes	N/A	Residence Address
residenceCountyCode	CHARACTER	10	Yes	N/A	The two digit numeric code for the California county.
deathDate	DATE	4	Yes	MEDS Eligibility Information – Date of Death	Date of Death
deathSourceCode	CHARACTER	10	Yes	MEDS Eligibility Information – Death Source	Death Source
authorizedRep	CHARACTER	36	Yes	N/A	Name of Authorized Representative
authorizedRepAddress	CHARACTER	150	Yes	N/A	Authorized Rep Address
alienStatusCode	CHARACTER	10	Yes	MEDS Eligibility Information – Refugee Alien Status	Refugee Alien Status
insEntryDate	DATE	4	Yes	MEDS Eligibility Information – INS Date of Entry	INS Date Of Entry
citizenshipDocumentTypeCode	CHARACTER	10	Yes	MEDS Eligibility Information – Citizenship Document Type	Citizenship Document Type
identityDocTypeCode	CHARACTER	10	Yes	MEDS Eligibility Information – Identity Document Type	Identity Document Type
medsAppellation	CHARACTER	10	Yes	N/A	MEDS Appellation
spokenLanguageCode	CHARACTER	10	Yes	N/A	Language
writtenLanguageCode	CHARACTER	10	Yes	N/A	Language
medsCountyCode	CHARACTER	10	Yes	MEDS Eligibility Information – MEDS County Code	The two digit numeric code for the California county.
medicareStatusCode	CHARACTER	10	Yes	N/A	Medicare Status
mediCalPrimaryEligStatusCode	CHARACTER	10	Yes	MEDS Eligibility Information – Medi-Cal Primary Eligibility Status	Medi-Cal Primary eligibility status

primaryEligTermDate	DATE	4	Yes	N/A	Primary Eligibility Term Date
primaryEligTermReasonCode	CHARA CTER	10	Yes	N/A	Primary Eligibility Term Reason
Serial	CHARA CTER	7	Yes	MEDS Eligibility Information – Serial	Serial
bicIssueDate	DATE	4	Yes	MEDS Eligibility Information – BIC Issue Date	BIC Issue Date
ewCode	CHARA CTER	10	Yes	N/A	Medi-Cal Eligibility Worker Code
districtOffice	CHARA CTER	3	Yes	N/A	District Office
otherHealthCoverStatusCode	CHARA CTER	10	Yes	N/A	Other Health Coverage Status
otherHealthCoverSourceCode	CHARA CTER	10	Yes	N/A	Other Health Coverage Source
rvDueMonth	DATE	4	Yes	MEDS Eligibility Information – RV Due Month	Medi-Cal RV Due Month
lastRVCompletedDate	DATE	4	Yes	MEDS Eligibility Information – Last RV Complete Date	Last Medi-Cal RV Completed Date
mediCalDenialDate	DATE	4	Yes	MEDS Eligibility Information – Medi-Cal Denial Date	Date Medi-Cal was Denied
mediCalDenialReasonCode	CHARA CTER	10	Yes	MEDS Eligibility Information – Medi-Cal Denial Reason	Medi-Cal Denial Reason
ssiDistrictOffice	CHARA CTER	3	Yes	N/A	SSI District Office
ssiPayStatusCode	CHARA CTER	10	Yes	N/A	SSI Pay Status
ssiPayStatusDate	DATE	4	Yes	N/A	SSI Pay Status Date
ssiLivingArrangementCode	CHARA CTER	10	Yes	N/A	SSI Living Arrangement
optionalLivingArrangeCode	CHARA CTER	10	Yes	MEDS Eligibility Information – Optional Living Arrangement	Optional Living Arrangement
healthInsuranceCoverageInd	CHARA CTER	1	No	N/A	Health Insurance Coverage
insuranceEntryDate	DATE	4	Yes	N/A	Insurance Entry Date
applicationTypeCode	CHARA CTER	10	Yes	N/A	Application Type
applicationDate	DATE	4	Yes	MEDS Eligibility Information – Application Date	Application Date
restrictionCode	CHARA CTER	10	Yes	N/A	Restriction
disabilityOnsetDate	DATE	4	Yes	MEDS Eligibility Information – Disability Onset Date	Disability Onset Date
mediCalEligibilityMonthDate	DATE	4	Yes	MEDS Eligibility Information – Eligibility Month /Year	Medi-Cal Eligibility Month
medsIDNumber	CHARA CTER	9	Yes	MEDS Eligibility Information – MEDS ID	Medi-Cal Identification
mediCalSOC	DECIMAL	31	No	MEDS Eligibility Information – Medi-Cal SOC	Medi-Cal Share of Cost
mediCalCaseNumber	CHARA CTER	11	Yes	MEDS Eligibility Information – Medi-Cal County ID	Medi-Cal Case Number
ffpInd	CHARA CTER	1	No	MEDS Eligibility Information – FFP	Indicates whether or not (Y/N) the individual is Federal Financial Participation (FFP) eligible for the Medi-Cal Eligibility Month. This value is populated from MEDS.
mediCalEligibilityStatus	CHARA CTER	10	Yes	N/A	Medi-Cal Eligibility Status
mediCalAidCode	CHARA CTER	10	Yes	MEDS Eligibility Information – MEDS Aid Code	Medi-Cal Aid Code

updateTypeCode	CHARACTER	10	Yes	MEDS Eligibility Information – Type	Type of update applied
ihssEligibilityStatus	CHARACTER	10	Yes	N/A	IHSS Eligibility Status is same as Medi-Cal Eligibility status
ihssCountyId	CHARACTER	14	Yes	N/A	IHSS County ID
primaryCountyId	CHARACTER	14	Yes	Medi-Cal Eligibility Information – County Person Number and Medi-Cal Eligibility Information – County FBU	Primary County ID
priorSocAmount	DECIMAL	31	No	N/A	Prior SOC Amount
ihssSocAmount	DECIMAL	31	No	N/A	IHSS SOC Amount
primaryLeRvCountyId	CHARACTER	14	Yes	N/A	Primary LeRv County ID
applicationFlag	CHARACTER	1	Yes	N/A	Application Flag
refugeeAlienIndicator	CHARACTER	1	Yes	N/A	Refugee Alien Indicator
hcpCountyCode	NUMERIC	2	Yes	View Medi-Cal Eligibility – Health Care Plan information cluster – Plan County (County Name)	HCP County Code
hcpCode	CHARACTER	3	Yes	View Medi-Cal Eligibility – Health Care Plan information cluster – Plan Code	HCP Plan Code
hcpStat	CHARACTER	2	Yes	View Medi-Cal Eligibility – Health Care Plan information cluster – Plan Status	HCP Plan Status
CreateBy	CHARACTER	30	Yes	N/A	Audit Field
CreateOn	TIMESTAMP	8	Yes	N/A	Audit Field
LastUpdateBy	CHARACTER	30	Yes	N/A	Audit Field
LastUpdatedOn	TIMESTAMP	8	Yes	N/A	Audit Field

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Medi-Cal Eligibility Segment Information

Table – Table Name – MediCalEligSegmentInfo

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
mediCalEligSegmentInfoID	BIGINT	8	No	System Generated	The primary key for MediCalEligSegmentInfo
mediCalEligInfoID	BIGINT	8	No	System Generated	The foreign key to the MediCalEligInfo table

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Configuration

Table – Table Name – Configuration

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
configID	BigInt	8	Primary key	System Generated	Primary key for Configuration table
name	Varchar	256	Unique key		Configuration property Name
lastWritten	DateTime	8	Yes		Current timestamp when the property is added
value	Varchar	500	Yes		Configuration property Value

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/FLSA Configuration Values

Table – Table Name – FLSAConfigurationValues

Config Name	Value	Notes
FLSASStartDate	2016-02-01	FLSA Effective Date
FLSAEndDate	9999-12-31	FLSA End Date
FLSAThreshold1	Null	The number of overtime violations which a Provider may incur before Provider made ineligible for "FLSAProvReinstatePeriod1" period of time
FLSAProvReinstatePeriod1	Null	Period of time which must elapse before a Provider can be reinstated as an eligible Provider once the individual was terminated due to FLSAThreshold1 violations
FLSAThreshold2	Null	The number of overtime violations beyond "FLSAThreshold1" which a Provider may incur being made ineligible for "FLSAProvReinstatePeriod2" period of time
FLSAProvReinstatePeriod2	Null	Period of time which must elapse before a Provider can be reinstated as an eligible Provider once the individual was terminated due to FLSAThreshold2 violations
FLSAWeeklyOrDailyLimit	Weekly	Allows the designation of "Weekly" or "Daily" whether overtime should be calculated on a Weekly or Daily bases
FLSAHours	40	Used in conjunction with the FLSAWeeklyOrDailyLimit value. The maximum number of weekly or daily hours a Provider may work before overtime is calculated
FLSATravelTimeMax	420	Maximum number of minutes allowed to be indicated as Weekly Travel Time.
SOC2255StartDate	9999-12-31	The date on which the SOC 2255 Provider Workweek Agreement form will be required
SOC2256StartDate	9999-12-31	The date on which the SOC 2256 Recipient Workweek Agreement form will be required
ROTDeclarationStartDate	9999-12-31	The date on which the Recipient Overtime Declaration form will be required (SOC426A Pages 2-3)
POTAgreementStartDate	9999-12-31	The date on which the Provider Overtime Agreement form will be required (SOC 846 –Overtime Agreement)
FPOEligibilityStartDate	2015-10-01	The date on which FPO Eligibility begins.
FPOEligibilityEndDate	9999-12-31	The date on which payments will no longer process using the FPO Eligible rules
PayAllProvidersOvertime	True	Can be set to "True" or "False"
TravelStartDate	9999-12-31	The date on which travel time will begin to be paid.
TravelEndDate	9999-12-31	The date on which travel time will no longer be paid.
TravelClaimStartDate	2016-02-01	The date on which travel claim forms will begin to be generated and are eligible to be paid from.
TravelClaimEndDate	9999-12-31	The date on which travel claim forms will no longer be generated and travel will no longer be paid.
TNotComplete	21	<p>The number of calendar days after the "County Review Letter Date" the Provider has to complete the Training when the status of the second violation is "Active" and training has not already been completed.</p> <p>3/28/2016 – As an interim measure the number of calendar day will be extended from 14 to 21 to accommodate requests for extensions. In a later release a screen modification will be completed to allow an indication of the request for extension. At that time this value will be changed back to 14.</p>

CountyEntryTraining	26	The number of calendar days after the "County Review Letter Date" or the "Dispute Letter Date" the county has to enter the "Date Training Completed. 3/28/2016 – As an interim measure the number of calendar day will be extended from 19 to 26 to accommodate requests for extensions. In a later release a screen modification will be completed to allow an indication of the request for extension. At that time this value will be changed back to 19.
CountyReviewComplete	3	The number of business days, from the "Violation Date" the county reviewer has to complete the County Review when a violation, other than, "Did not complete Mandatory Training" is triggered.
CountySupervisorReviewComplete	2	The number of business days, from the "Violation Date" that the county supervisor has to complete the "County Supervisor Review when the County Review outcome is "Override".
DisputeFiled	45	The number of calendar days a Provider has to file a dispute with the county after the "County Review Letter Date" when a violation is "Active".
CountyDisputeComplete	45	The number of business days, from the Dispute Entered Date, the county has to complete a "Violation Dispute" filed by a Provider. This timeframe includes both the worker and supervisor review actions.
NextPossibleViolationDate	11	The number of calendar days in the future the first day of the next calendar month must be to set the Next Possible Violation Date to the first day of that month. Otherwise, the Next Possible Violation Date will be set to the first day of the next future calendar month.
StateAdminReviewFiled	14	The number of calendar days a Provider has to file a State Review with CDSS after the "Dispute Letter Date" when a third or fourth violation becomes "Active".
StateAdminReviewComplete	15	The number of business days allowed to complete the State Administrative Review process.
ProviderTermination	20	The number of calendar days in the future a Provider will be terminated. The calendar day count begins the day after the "County Letter Date" when either a third or fourth violation becomes "Active".
ThirdViolationIneligiblePeriod	90	The number of calendar days a Provider is ineligible to serve (Terminated) as an IHSS or WPCS Provider when a third overtime violation becomes "Active".
FourthViolationIneligiblePeriod	365	The number of calendar days a Provider is ineligible to serve (Terminated) as an IHSS or WPCS Provider when a fourth overtime violation becomes "Active".
ViolationStartDate	9999-12-31	The date CMIPS will begin enforcing violations incurred by a Provider.
OTVExemptionStartDate	2016-05-01	The Start Date of Overtime Violation Exemption
OTVExemptionEndDate	9999-12-31	The End Date of Overtime Violation Exemption
CoriEndDateOTViolation	90	The number of days in the future, to ensure that any non-end dated CORI records are closed after the 4th Overtime Violation is indicated as Active
FlexibleHoursStartDate	2016-05-01	The Start Date of Overtime Violation Exemption
FlexibleHoursEndDate	9999-12-31	The End Date of Overtime Violation Exemptions
FlexibleHoursLimit	1200	The number of minutes (20 hours) allowed per month that may be approved as Flexible Hours
FlexibleHoursBackDate	3	The number of Months prior to the current month a Flexible Hours segment can be created. (Example if the indications is 3 and the current date is 4/26/2016 then the Month requested may only be set back the January of 2016.)
WeeklyMax1_Many	66:00 (3960 minutes)	The maximum number of hours per week a provider may claim before an overtime violations is trigger when the provider has more than one "Active" Providers Hours (IHSS) and one or more "Active" WPCS Hours may claim (current and previously processed)
WeeklyMax1_1WPCS	70:45 (4245 minutes)	The maximum number of hours per week a provider may work when the provider has one "Active" Provider Hours and one "Active" WPCS Hours segments for the same recipient case before an Overtime Violation is triggered

HoldLateIHSTimesheet	False	<p>When value is 'True' IHSS Arrears timesheets will be held if they are received more than 15 days after the last day of their respective pay period.</p> <p>When value is 'False' IHSS Arrears timesheets will not be held for late submission.</p> <p>Note: If this value is set to 'True' and timesheets are placed in Held – Late Submission and the table value is updated to 'False' then any IHSS timesheets received after that update will not be subject to the late timesheet business rules.</p> <p>Those IHSS timesheets that are already in Held – Late Submission will remain in that status until they are released by a County user with appropriate access or by the semi-monthly batch job.</p>
HoldLateWPCTimesheet	False	<p>When value is 'True' WPCS timesheets will be held if they are received more than 15 days after the last day of their respective pay period.</p> <p>When value is 'False' WPCS timesheets will not be held for late submission.</p> <p>Note: If this value is set to 'True' and timesheets are placed in Held – Late Submission and the table value is updated to 'False' then any WPCS timesheets received after that update will not be subject to the late timesheet business rules.</p> <p>Those WPCS timesheets that are already in Held – Late Submission will remain in that status until they are released by a County user with appropriate access or by the semi-monthly batch job.</p>
CDSSReviewComplete	15	The number of business days CDSS has to complete the CDSS Escalated Review process
ExemptionCutbackStartDate	2017/01/01	The date a provider marked as Overtime Exemption will be limited to being paid 360:00 hours per month
ExemptionType1	360:00 (21600 minutes)	The total number a provider may work in a month when the provider has and Overtime Exemption Type 1 – Parent Provider
ExemptionType2	360:00 (21600 minutes)	The total number a provider may work in a month when the provider has and Overtime Exemption Type 2 – Extraordinary Circumstances
ExemptionType3	360:00 (21600 minutes)	The total number a provider may work in a month when the provider has and Overtime Exemption Type3 – WPCS
IRSLiveIndicator	true / false	If value is 'true' IRS Live indicator functionality will enabled in Case Management else IRS Live in indicator functionality will disabled.
OTVExemptDue	30	The number of calendar days the county has to make a determination for an Overtime Violation Exemption request.
OTVEAROutcomeDueDate	20	The number of calendar days CDSS has to review an OTVE – Extraordinary Circumstance Record.
SickLeaveStart Date	2018-07-01	The effective date on which providers who serve only IHSS or both IHSS and WPCS service hours will begin to accrue hours toward their eligibility to claim Sick Leave.
WPCSSickLeaveStart Date	9999-12-31	The effective date on which providers who serve WPCS service hours only will begin to accrue hours toward their eligibility to claim Sick Leave
OverpaidOvertimeStart Date	MM/DD/YYYY	<p>The first day Overpaid Overtime function may be used.</p> <p>If Pending Transaction exist, CGI will provide a list for counties</p>
ViolationThresholdOneToOne	7	The number of minutes over the OT maximum used to determine if an overtime violation should be triggered for a one-to-one provider.
ViolationThresholdOneToMany	3	The number of minutes over the OT maximum used to determine if an overtime violation should be triggered for a one-to-many provider.
SickLeaveEmergencyStart Date	MM/DD/YYYY	The effective date on which Sick Leave Emergency special transactions can be created.
SickLeaveEmergencyEnd Date	MM/DD/YYYY	The effective date on which Sick Leave Emergency special transactions can no longer be created.
SickLeaveEmergencyHoursLimit	4800	Maximum number of minutes allowed to be entered on SCLE special transaction.

CovidSickLeaveStateStartDate	2021-01-01	The effective date on which COVID Sick Leave State special transactions can be created.
CovidSickLeaveStateEndDate	YYYY-MM-DD	The effective date on which COVID Sick Leave State special transactions can no longer be created.
CovidSickLeaveStateHoursLimit	4800	Maximum number of minutes allowed to be entered on CVDP special transaction in a calendar year.
CovidSickLeaveMedAccStartDate	2021-01-01	The effective date on which COVID Medical Accompaniment special transactions can be created.
CovidSickLeaveMedAccEndDate	YYYY-MM-DD	The effective date on which COVID Medical Accompaniment special transactions can no longer be created.
CovidSickLeaveMedAccHoursLimit	20	Maximum number of minutes allowed to be entered on CVDR special transaction.
evvLocationServicesStartDate	12/31/9999	The date the EVV Location Services goes Live.
CareerPathwaysCutOffDate	YYYY-MM-DD	The effective date on or after which Career Pathway Services are turned on.
BackUpProviderStartDate	2022-10-01	The effective date from which Statewide back-up provider system is turned on.
CareerPathwaysCutOffPayPeriod	09/30/2024	The pay period cutoff date which will not allow future pay periods to be displayed on Add Training Time Claim screen for Career Pathways.
CareerPathwaysMaxDate	09/16/2024	The maximum date which will not allow claims for future dates to be submitted through the Add Training Time Claim screen for Career Pathways.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Workweek Agreement

Table – Table Name – RecipWorkweekAgreement

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
recipWorkWeekAgreementID	BIGINT	8	No	System Generated	PrimaryKey
caseID	BIGINT	8	No	Foreign Key – caseID	Foreign key to CaseHeader
concernRoleID	BIGINT	8	No	N/A	Foreign key to ConcernRole (Provider)
ProviderEnrollmentID	BIGINT	8	No	N/A	Foreign Key to ProviderEnrollement
fromDate	DATE	4	No	N/A	Recipient Workweek agreement begin date
toDate	DATE	4	Yes	N/A	Recipient Workweek agreement end date
recordStatus	CHARACTER	10	Yes	Recipient Workweek agreement – Status	Recipient Workweek agreement status – WorkweekAgreement Codableable
weekly	INTEGER	4	No	Recipient Workweek agreement - weekly	Weekly hours for Recipient Workweek agreement
sun	INTEGER	4	No	View Recipient Workweek agreement - Sunday	Recipient Workweek agreement hours for Sunday
mon	INTEGER	4	No	View Recipient Workweek agreement - Monday	Recipient Workweek agreement hours for Monday
tue	INTEGER	4	No	View Recipient Workweek agreement - Tuesday	Recipient Workweek agreement hours for Tuesday
wed	INTEGER	4	No	View Recipient Workweek agreement - Wednesday	Recipient Workweek agreement hours for Wednesday
thu	INTEGER	4	No	View Recipient Workweek agreement - Thursday	Recipient Workweek agreement hours for Thursday
fri	INTEGER	4	No	View Recipient Workweek agreement - Friday	Recipient Workweek agreement hours for Friday
sat	INTEGER	4	No	View Recipient Workweek agreement - Saturday	Recipient Workweek agreement hours for Saturday
total	INTEGER	4	No	View Recipient Workweek agreement – Total Hours	Total Recipient Workweek agreement Hours for the week
currentWWAgreementInd	CHARACTER	1	No	N/A	Identifies the current workweek agreement record.
programType	CHARACTER	10	No	Provider Workweek Agreement Program Type	WorkWeekAgreement ProgramType
createdOn	DATETIME	8	Yes	N/A	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	Yes	N/A	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	Yes	N/A	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	Yes	N/A	Audit Field - The record modified time stamp.
backupProvider	CHARACTER	1	No	Back-up Provider indicator	Whether this is a back-up provider (Y or N)

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Workweek Agreement Snapshot

Table – Table Name – RecipWorkweekAgreementSnapshot

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
recipWorkWeekAgreementSnapshotID	BIGINT	8	No	System Generated	PrimaryKey
recipWorkWeekAgreementID	BIGINT	8	No	System Generated	ForeignKey to Recipient WorkWeekAgreement
caseID	BIGINT	8	No	N/A	Foreign key to CaseHeader
concernRoleID	BIGINT	8	No	N/A	Foreign key to ConcernRole (Provider)
ProviderEnrollmentID	BIGINT	8	No	N/A	Foreign Key to ProviderEnrollement
fromDate	DATE	4	No	N/A	Recipient Workweek agreement begin date
toDate	DATE	4	Yes	N/A	Recipient Workweek agreement end date
recordStatus	CHARACTER	10	Yes	Recipient Workweek agreement – Status	Recipient Workweek agreement status – WorkweekAgreement status Codetable
weekly	INTEGER	4	No	Recipient Workweek agreement - weekly	Weekly hours for Recipient Workweek agreement
sun	INTEGER	4	No	View Recipient Workweek agreement - Sunday	Recipient Workweek agreement hours for Sunday
mon	INTEGER	4	No	View Recipient Workweek agreement - Monday	Recipient Workweek agreement hours for Monday
tue	INTEGER	4	No	View Recipient Workweek agreement - Tuesday	Recipient Workweek agreement hours for Tuesday
wed	INTEGER	4	No	View Recipient Workweek agreement - Wednesday	Recipient Workweek agreement hours for Wednesday
thu	INTEGER	4	No	View Recipient Workweek agreement - Thursday	Recipient Workweek agreement hours for Thursday
fri	INTEGER	4	No	View Recipient Workweek agreement - Friday	Recipient Workweek agreement hours for Friday
sat	INTEGER	4	No	View Recipient Workweek agreement - Saturday	Recipient Workweek agreement hours for Saturday
total	INTEGER	4	No	View Recipient Workweek agreement – Total Hours	Total Recipient Workweek agreement Hours for the week
currentWWAgreementInd	CHARACTER	1	No	N/A	Identifies the current workweek agreement record.
programType	CHARACTER	10	No	Provider Workweek Agreement Program Type	WorkWeekAgreement ProgramType
createdOn	DATETIME	8	Yes	N/A	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	Yes	N/A	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	Yes	N/A	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	Yes	N/A	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	NA	System Generated – How many times the record modified.
backupProvider	CHARACTER	1	No	Back-up Provider indicator	Whether this is a back-up provider (Y or N)

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Overtime Agreement

Table – Table Name – RecipientOverTimeAgreement

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
RecipientOverTimeAgreementID	BIGINT	8	No	System Generated	PrimaryKey
caseID	BIGINT	8	No	N/A	Foreign key to CaseHeader
receivedDate	DATE	4	No	Create Recipient Overtime agreement – DateReceived	Recipient Over time agreement form received date.
recordStatus	CHARACTER	10	Yes	N/A	Overtime Agreement Status
createdDate	DATE	8	No	View Recipient Over Time Agreement – CreatedOn	Created Date for Recipient overtime agreement
createdOn	DATETIME	8	Yes	View Recipient Over Time Agreement – Created On	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	Yes	N/A	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	Yes	N/A	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	Yes	View Recipient Over Time Agreement – Updated By	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	N/A	System Generated – How many times the record modified.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch PWA Trigger

Table – Table Name – BatchPWATrigger

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
batchPWATriggerID	BIGINT	8	No	N/A	Primary key for BatchPWATrigger.
workweekAgreementID	BIGINT	8	No	N/A	Foreign key to Work week agreement
concernroleID	BIGINT	10	No	N/A	Foreign key to ConcernRole
effectiveDate	DATE	4	Yes	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	Yes	N/A	Batch table record status
errorMessage	CHARACTER	200	Yes	N/A	The error message

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Provider Overtime Max Trigger

Table – Table Name – BatchProviderOTMaxTrigger

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
batchProviderOTMaxTriggerID	BIGINT	8	No	N/A	Primary key for BatchProviderOTMax Trigger.
concernroleID	BIGINT	10	No	N/A	Foreign key to ConcernRole
effectiveDate	DATE	4	Yes	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	Yes	N/A	Batch table record status
errorMessage	CHARACTER	200	Yes	N/A	The error message

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Active Provider Trigger

Table – Table Name – BatchActiveProviderTrigger

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
batchActiveProviderTriggerID	BIGINT	8	No	N/A	Primary key for BatchActiveProviderTrigger.
concernroleID	BIGINT	10	No	N/A	Foreign key to ConcernRole
effectiveDate	DATE	4	Yes	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	Yes	N/A	Batch table record status
errorMessage	CHARACTER	200	Yes	N/A	The error message

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Recipient Workweek Agreement Trigger

Table – Table Name – BatchRWATrigger

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
batchRWATriggerID	BIGINT	8	No	N/A	Primary key for BatchRWATrigger.
recipWorkweekAgreementID	BIGINT	8	No	N/A	Foreign key to Recipient Work week agreement
caseID	BIGINT	10	No	N/A	Foreign key to Case
effectiveDate	DATE	4	Yes	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	Yes	N/A	Batch table record status
errorMessage	CHARACTER	200	Yes	N/A	The error message

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Case Overtime Maximum Trigger

Table – Table Name – BatchCaseOTMaxTrigger

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
batchCaseOTMaxTriggerID	BIGINT	8	No	N/A	Primary key for BatchCaseOTMax Trigger.
caseID	BIGINT	10	No	N/A	Foreign key to CaseHeader
effectiveDate	DATE	4	Yes	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	Yes	N/A	Batch table record status
errorMessage	CHARACTER	200	Yes	N/A	The error message

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch Active Case Trigger

Table – Table Name – BatchActiveCaseTrigger

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
batchActiveCaseTriggerID	BIGINT	8	No	N/A	Primary key for BatchActiveCaseTrigger.
caseID	BIGINT	10	No	N/A	Foreign key to CaseHeader
effectiveDate	DATE	4	Yes	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	Yes	N/A	Batch table record status
errorMessage	CHARACTER	200	Yes	N/A	The error message

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case BVI

Table – Table Name – CASEBVI

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
caseBVIID	INTEGER	8	Primary Key	N/A	Primary Key
caseID	INTEGER	8	Foreign Key	N/A	Case ID of the Recipient
fromDate	DATETIME	8	No	N/A	Start Date for BVI Options
toDate	DATETIME	8	No	N/A	End Date for BVI Options
bviTimesheetIND	CHARACTER	10	No	N/A	BVI Timesheet Accommodation
impairmentCode	CHARACTER	10	Yes	N/A	Impairment Code Blind or Visually Impaired
deliveryOptionCode	CHARACTER	10	Yes	N/A	Delivery Options
ihssRequiredFormsOption	CHARACTER	10	Yes	N/A	Required Forms Options
recipAuthNumber	INTEGER	4	Yes	N/A	Recipient Authentication Number
createdOn	DATETIME	8	Yes	NA	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	Yes	NA	Audit Field - The record created by.
recordStatus	Character	10	No	N/A	Record Status to indicate active or inactive records
lastUpdatedOn	DATETIME	8	Yes	NA	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	Yes	NA	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	NA	System Generated – How many times the record modified.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Case BVI Snapshot

Table – Table Name – CASEBVISNAPSHOT

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
CaseBVISSnapshotID	INTEGER	8	Primary Key	N/A	Primary Key
caseBVIID	INTEGER	8	Foreign Key	N/A	Foreign Key to CaseBVI
caseID	INTEGER	8	Foreign Key	N/A	Case ID of the Recipient
fromDate	DATETIME	8	No	N/A	Start Date for BVI Options
toDate	DATETIME	8	No	N/A	End Date for BVI Options
bviTimesheetIND	CHARACTER	10	No	N/A	BVI Timesheet Accommodation
impairmentCode	CHARACTER	10	Yes	N/A	Impairment Code Blind or Visually Impaired
deliveryOptionCode	CHARACTER	10	Yes	N/A	Delivery Options
ihssRequiredFormsOption	CHARACTER	10	Yes	N/A	Required Forms Options
recipAuthNumber	INTEGER	4	Yes	N/A	Recipient Authentication Number
createdOn	DATETIME	8	Yes	NA	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	Yes	NA	Audit Field - The record created by.
recordStatus	Character	10	No	N/A	Record Status to indicate active or inactive records
lastUpdatedOn	DATETIME	8	Yes	NA	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	Yes	NA	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	NA	System Generated – How many times the record modified.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Text Trigger

Table – Table Name - BVINOATextTrigger

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
bviNOATextTriggerID	BIGINT	8	No	N/A	Primary key for BVINOATextTrigger.
concernroleCommunicationId	BIGINT	8	No	N/A	Foreign key to ConcernRoleCommunication
caseID	BIGINT	8	No	N/A	Foreign key to CaseHeader
bviNOATextDefinitionID	BIGINT	8	No	N/A	Foreign key to BVINOATextDefinition
bviNOATextParams	BLOB	131072	No	N/A	Parameters to generate the BVI NOA Text Message
effectiveDate	DATE	4	No	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	No	N/A	Code value of BatchStagingTableStatus
createdOn	TIMESTAMP	8	Yes	N/A	
createdBy	CHARACTER	30	Yes	N/A	
lastUpdatedOn	TIMESTAMP	8	Yes	N/A	
lastUpdatedBy	CHARACTER	30	Yes	N/A	
versionNo	INTEGER	4	No	N/A	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Text Definition

Table – Table Name – BVINOATextDefinition

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
bviNOATextDefinitionID	BIGINT	8	No	N/A	Primary key for BVIMessageDefinition
bviNOATextDefName	CHARACTER	10	No	N/A	Code value of BVI NOA template type
description	CHARACTER	254	No	N/A	Description of the BVI NOA Text Definition
bviNOATextDefinition	BLOB	131072	No	N/A	Definition of the BVI NOA Text Definition
bviNOATextDefVersion	INTEGER	4	No	N/A	Version of the BVI NOA Text Definition
bviNOATextDefLocale	CHARACTER	10	No	N/A	Code table value of Locale
relatesTo	CHARACTER	10	No	N/A	Code value of TemplateRelatesTo
bviNOATextDefType	CHARACTER	10	No	N/A	Code value of CommunicationType
comments	VARCHAR	300	No	N/A	comments
createdOn	TIMESTAMP	8	Yes	N/A	
createdBy	CHARACTER	30	Yes	N/A	
lastUpdatedOn	TIMESTAMP	8	Yes	N/A	
lastUpdatedBy	CHARACTER	30	Yes	N/A	
versionNo	INTEGER	4	No	N/A	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Text Message

Table – Table Name – BVINOATextMessage

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
bviNOATextMessageID	BIGINT	8	No	N/A	Primary key for BVINOATextMessage.
bviNOATextTriggerID	BIGINT	8	No	N/A	Foreign key for BVINOATextTrigger.
bviNOATextMessage	BLOB	131072	No	N/A	Generated BVI NOA Text Message based on BVI NOA Text Definition
createdOn	TIMESTAMP	8	Yes	N/A	
createdBy	CHARACTER	30	Yes	N/A	
lastUpdatedOn	TIMESTAMP	8	Yes	N/A	
lastUpdatedBy	CHARACTER	30	Yes	N/A	
versionNo	INTEGER	4	No	N/A	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Communication

Table – Table Name – BVINOACommunication

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
bviNOACommunicationID	BIGINT	8	No	N/A	Primary key for BVINOACommunication.
bviNOATextTriggerID	BIGINT	8	No	N/A	Foreign key for BVINOATextTrigger.
caseID	BIGINT	8	No	N/A	Foreign key to CaseHeader
bviNOAIdentifier	CHARACTER	20	No	N/A	Generated BVI NOA Text Identifier
bviNOATextFileName	CHARACTER	100	Yes	N/A	BVI NOA Text File Name
bviNOATextFileSendDate	TIMESTAMP	10	Yes	N/A	Send Date of BVI NOA Text File
bviNOAISOFileName	CHARACTER	100	Yes	N/A	BVI NOA ISO File Name
bviNOAISOFileReceivedDate	TIMESTAMP	8	Yes	N/A	Received Date of BVI NOA ISO File from ACG-TTS
bviNOAISOFileSendDate	TIMESTAMP	8	Yes	N/A	Send Date of BVI NOA ISO File after verifying checksum
bviNOAMailingDate	DATE	4	Yes	N/A	BVI NOA Mailing Date
bviNOAStatus	CHARACTER	50	No	N/A	BVI NOA status for tracking
bviNOAErrorMessage	CHARACTER	254	Yes	N/A	BVI NOA Error Message
createdOn	TIMESTAMP	8	Yes	N/A	
createdBy	CHARACTER	30	Yes	N/A	
lastUpdatedOn	TIMESTAMP	8	Yes	N/A	
lastUpdatedBy	CHARACTER	30	Yes	N/A	
versionNo	INTEGER	4	No	N/A	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI NOA Braille Trigger

Table – Table Name - BVINOABRAILLETRIGGER

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
bviNOABrailleTriggerID	BIGINT	8	No	N/A	Primary key for BVINOABRAILLETRIGGER
concernRoleCommunicationID	BIGINT	8	No	N/A	Foreign key to CONCERNROLECOMMUNICATION
caseID	BIGINT	8	No	N/A	Foreign key to CASEHEADER
bviNOAIdentifier	CHARACTER	20	No	N/A	Unique identifier for each NOA in the system
effectiveDate	DATE	4	No	N/A	Effective date
processedDate	DATE	4	Yes	N/A	The date Record was processed
recordStatus	CHARACTER	10	No	N/A	Code value of BatchStagingTableStatus
bviAttachmentID	BIGINT	8	Yes	N/A	Foreign key to BVIATTACHMENT
bviBrailleFileName	CHARACTER	100	Yes	N/A	File Name of PDF
bviBrailleFileSendDate	TIMESTAMP		Yes	N/A	Date and time when the PDF is generated and sent to BW
bviBrailleFileReceiveDate	DATE		Yes	N/A	Date when an acknowledgement is received from BW for receipt of PDF file
bviBrailleFileMailingDate	DATE		Yes	N/A	Date when a confirmation is received from BW after mailing of Braille NOA
bviNOAStatus	CHARACTER	50	Yes	N/A	Status of Braille NOA
bviNOAErrorMessage	CHARACTER	254	Yes	N/A	Error code
createdOn	TIMESTAMP	8	Yes	N/A	Timestamp when created
createdBy	CHARACTER	30	Yes	N/A	Created by user name
lastUpdatedOn	TIMESTAMP	8	Yes	N/A	Timestamp when last modified
lastUpdatedBy	CHARACTER	30	Yes	N/A	Recently modified by user name
versionNo	INTEGER	4	No	N/A	Latest version number

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/BVI Attachment

Table – Table Name - BVIATTACHMENT

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
bviAttachmentID	BIGINT	8	No	N/A	Primary key for BVIATTACHMENT
bviAttachmentContents	BLOB	28000000	No	N/A	Attachment content
bviAttachmentName	CHARACTER	100	Yes	N/A	Name of the BVI NOA PDF file name
bviAttachmentPath	VARCHAR	300	Yes	N/A	Name of the BVI NOA PDF File path
bviAttachmentStatus	CHARACTER	10	Yes	N/A	Status of the BVI NOA Attachment content
documentType	CHARACTER	10	Yes	N/A	Type of document
receiptDate	DATE	4	Yes	N/A	Date when the Braille NOA creation request is received
statusCode	CHARACTER	10	Yes	N/A	Code value of RecordStatus
attachedFileInd	CHARACTER	1	No	N/A	Attachment Indicator
printedDate	DATE	4	Yes		Date when the document is printed
printStatus	CHARACTER	10	Yes		Document print status
createdOn	TIMESTAMP	8	Yes	N/A	Timestamp when last modified
createdBy	CHARACTER	30	Yes	N/A	Created by user name
lastUpdatedOn	TIMESTAMP	8	Yes	N/A	Latest version number
lastUpdatedBy	CHARACTER	30	Yes	N/A	Recently modified by user name
versionNo	INTEGER	4	No	N/A	Latest version number

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Batch FPO Eligibility Trigger

Table – Table Name – BatchFPOEligibilityTrigger

Field	Type	Length	Nulls	Screen Name – Field Name	Comments
batchFPOEligibilityTriggerID	BIGINT	8	No	System Generated	Primary key
caseParticipantRoleID	BIGINT	8	No	N/A	Foreign key for CaseParticipantRole
ProviderConcernRoleID	BIGINT	8	No	N/A	Foreign Key for ProviderConcernRole
caseConcernRoleID	BIGINT	10	No	N/A	Foreign Key for Case ConcernRole
caseID	BIGINT	4	No	N/A	Foreign Key for CaseID
countyCode	CHARACTER	10	No	N/A	County Code
triggerType	CHARACTER	10	No	N/A	To Identify Recipient Address and Provider Address change, Assign Case Provider or Create Provider Hours from On-Leave or Terminated
receivedDate	DATE	4	No	N/A	The Date when the Batch Trigger is Received
effectiveDate	DATE	4	No	N/A	The Date when the Batch Trigger is Effective
processedDate	DATE	4	Yes	N/A	The date Record is processed
recordStatus	CHARACTER	10	No	N/A	Batch table record status
errorMessage	VARCHAR	200	Yes	N/A	The error message
serverName	BIGINT	8	No	N/A	Server Name where the Trigger is processed
createdOn	DATETIME	8	No	N/A	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	No	N/A	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	No	N/A	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	No	N/A	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	N/A	System Generated – How many times the record modified.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Communication

Table – ConcernRoleCommunication

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
COMMUNICATIONID	BIGINT	8	NO		Primary key for ConcernRoleCommunication.
CONCERNROLEID	BIGINT	8	NO		Case ConcernRoleID
TYPECODE	CHARACTER(10)	10			Form TypeCode
PROFORMAVERSIONNO	INTEGER	1	NO		XSL ProformaVersionNO
METHODTYPECODE	CHARACTER(10)	10			
INCOMINGIND	CHARACTER(1)	1	NO		
COMMUNICATIONDATE	TIMESTAMP	8			Form Communication Date and Time
STATUSCODE	CHARACTER(10)	10			
CORRESPONDENTNAME	CHARACTER(56)	56			Correspondent Name
CORRESPONDENTCONCERNROLEID	BIGINT	8			Correspondent ConcernRoleID
CORRESPONDENTTYPECODE	CHARACTER(10)	10			Correspondent Type
SUBJECTTEXT	CHARACTER(100)	100			Form Subject Text
DOCUMENTLOCATION	CHARACTER(50)	50			
DOCUMENTREFNUMBER	CHARACTER(16)	16			
FILELOCATION	CHARACTER(40)	40			
FILEREFERENCENUMBER	CHARACTER(16)	16			
CASEID	BIGINT	8			Case ID
TICKETID	BIGINT	8			
USERNAME	CHARACTER(30)	30	NO		User Name
COMMENTS	VARCHAR(200)	200			Form Comments
COMMUNICATIONTEXT	CLOB(131072)	131072			Form Communication Text
ADDRESSID	BIGINT	8			AddressID
PHONENUMBERID	BIGINT	8			PhoneNumberID
EMAILADDRESSID	BIGINT	8			EmailAddressID
PROFORMAID	BIGINT	8			
COMMUNICATIONSTATUS	CHARACTER(10)	10			
PROFORMAIND	CHARACTER(1)	1	NO		
ATTACHMENTIND	CHARACTER(1)	1	NO		
DOCUMENTTEMPLATEID	CHARACTER(40)	40			
COMMUNICATIONFORMAT	CHARACTER(10)	10			
LOCALEIDENTIFIER	CHARACTER(10)	10			Local Identifier
FREEFORMTEXT	VARCHAR(700)	700			
SENSITIVITY	CHARACTER(10)	10			Form Sensitivity
COMMUNICATIONTIME	TIMESTAMP	8			
ISPRINTCENTER	CHARACTER(1)	1			IsPrintCenter
DELIVERYOPTIONCODE	CHARACTER(10)	10			Code table value of BVIDeliveryOption
BVINOAREGENERATEFLAG	CHARACTER(1)	1	NO		BVI NOA Regeneration Flag
BVINOASTATUS	CHARACTER(10)	10			Code table value of BVINOAGenerationType
BVINOAGENERATEFLAG	CHARACTER(1)	1	NO		BVI NOA Generate Flag
BVINOASTATUSDATE	DATE	4			BVI NOA Status Date
REPRINTLOCALEIDENTIFIER	CHARACTER(10)	10			Reprint Local Identifier

ATTACHMENTID	BIGINT	8			Forms Attachment ID
CREATEDBY	CHARACTER(30)	30			Audit Field
CREATEDON	TIMESTAMP	8			Audit Field
LASTUPDATEDBY	CHARACTER(30)	30			Audit Field
LASTUPDATEDON	TIMESTAMP	8			Audit Field
VERSIONNO	INTEGER	1			Audit Field
REPRINTPROFORMAVERSIONNO	INTEGER	1	NO		XSL ProformaVersionNO
ISNOATOBESUPPRESSED	CHARACTER(1)	1	NO		Suppress NOA only Flag
REPRINTCOUNT	BIGINT	1			Number of times a NOA has been reprinted

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Communication Attachment Link

Table – CommAttachmentLink

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
COMMATTACHMENTLINKID	BIGINT	8	NO		Primary key for CommAttachmentLink.
COMMUNICATIONID	BIGINT	8	NO		Foreign Key for ConcernRoleCommunication Table
ATTACHMENTID	BIGINT	8	NO		Foreign Key for Attachment Table
CREATEDTIME	TIMESTAMP	8	YES		Timestamp of the Record
VERSIONNO	INTEGER	1	NO		Audit Field

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Communication Snapshot

Table – ConcernRoleCommunicationSnapshot

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
COMMUNICATIONSNAPSHOTID	BIGINT	8	NO		Primary key for ConcernRoleCommunicationSnapshot.
COMMUNICATIONID	BIGINT	8	NO		Foreign key for ConcernRoleCommunication.
CONCERNROLEID	BIGINT	8	NO		Case ConcernRoleID
TYPECODE	CHARACTER(10)	10			Form TypeCode
PROFORMAVERSIONNO	INTEGER	1	NO		XSL ProformaVersionNO
COMMUNICATIONDATE	TIMESTAMP	8			Form Communication Date and Time
CORRESPONDENTNAME	CHARACTER(56)	56			Correspondent Name
CORRESPONDENTCONCERNROLEID	BIGINT	8			Correspondent ConcernRoleID
CORRESPONDENTTYPECODE	CHARACTER(10)	10			Correspondent Type
SUBJECTTEXT	CHARACTER(100)	100			Form Subject Text
CASEID	BIGINT	8			Case ID
USERNAME	CHARACTER(30)	30	NO		User Name
COMMENTS	VARCHAR(200)	200			Form Comments
COMMUNICATIONTEXT	CLOB(131072)	131072			Form Communication Text
ADDRESSID	BIGINT	8			AddressID
PHONENUMBERID	BIGINT	8			PhoneNumberID
EMAILADDRESSID	BIGINT	8			Email Address
PROFORMAID	BIGINT	8			Proforma ID
COMMUNICATIONSTATUS	CHARACTER(10)	10			Forms Communication Status
LOCALEIDENTIFIER	CHARACTER(10)	10			Local Identifier
FREEFORMTEXT	VARCHAR(700)	700			Free Form TEXT
SENSITIVITY	CHARACTER(10)	10			Form Sensitivity
COMMUNICATIONTIME	TIMESTAMP	8			Communication Timestamp
ISPRINTCENTER	CHARACTER(1)	1			IsPrintCenter
DELIVERYOPTIONCODE	CHARACTER(10)	10			Code table value of BVIDeliveryOption
BVINOAREGENERATEFLAG	CHARACTER(1)	1	NO		BVI NOA Regeneration Flag
BVINOASTATUS	CHARACTER(10)	10			Code table value of BVINOAGenerationType
BVINOAGENERATEFLAG	CHARACTER(1)	1	NO		BVI NOA Generate Flag
BVINOASTATUSDATE	DATE	4			BVI NOA Status Date
REPRINTLOCALEIDENTIFIER	CHARACTER(10)	10			Reprint Local Identifier
ATTACHMENTID	BIGINT	8			Forms Attachment ID
CREATEDBY	CHARACTER(30)	30			Audit Field
CREATEDON	TIMESTAMP	8			Audit Field
LASTUPDATEDBY	CHARACTER(30)	30			Audit Field
LASTUPDATEDON	TIMESTAMP	8			Audit Field
VERSIONNO	INTEGER	1			Audit Field
REPRINTPROFORMAVERSIONNO	INTEGER	1	NO		XSL ProformaVersionNO
ISNOATOBESUPPRESSED	CHARACTER(1)	1	NO		Suppress NOA only Flag

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Flexible Hours

Table – RecipientFlexibleHours

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
recipientFlexibleHoursID	BIGINT	8	No	System Generated	Primary key for RecipientFlexibleHours
caseID	BIGINT	8	No	System Generated	Foreign key to CaseHeader.
serviceMonth	CHARACTER	10	No	N/A	Month for which Recipient Flexible hours are requested.
serviceYear	STRING	4	No	N/A	Year in which the Flexible Hours are requested.
frequency	CHARACTER	10	No	N/A	Frequency of the Recipient Flexible Hours either On-Going or One-Time.
flexibleHoursEndDate	Date	4	No	N/A	End Date of the flexible hours when the Frequency is On-Going.
programType	CHARACTER	10	No	N/A	Recipient's program type, IHSS or WPCS
flexibleHoursRequested	INTEGER	4	Yes	N/A	Number of Additional Overtime hours approved by the County.
flexibleHoursApproved	INTEGER	4	Yes	N/A	Number of Additional Overtime hours requested by the Recipient.
requestDate	Date	4	No	N/A	Date on which Flexible Hours are requested.
approved	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Approved
deniedNotUnanticipated	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Denied – Need not unanticipated.
deniedNotImmediate	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Denied – Need not Immediate.
deniedNoHealthSafetyIssue	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Denied – No Health or Safety Issue.
requestOutcomeDate	Date	4	Yes	N/A	Date of the county determined Outcome for the request of Recipient Flexible Hours
outcomeLetterDate	Date	4	Yes	N/A	Date of the county determined Outcome Letter for the request of Recipient Flexible Hours
cancellationLetterDate	Date	4	Yes	N/A	End Date of the county determined Outcome Letter for the request of Recipient Flexible Hours
comments	CHARACTER	1000	Yes	N/A	Comment field to be used by the county users.
recordStatus	CHARACTER	10	No	N/A	Status of the record. RST1 or RST2
createdOn	DATETIME	8	No	NA	Audit Field - The record creation date-time stamp.
createdBy	CHARACTER	30	No	NA	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	No	NA	Audit Field - The record modified date-time stamp.
lastUpdatedBy	CHARACTER	30	No	NA	Audit Field - The record modified by.
versionNo	INTEGER	4	No	NA	System Generated – How many times the record got modified.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Flexible Hours Snapshot

Table – RecipientFlexibleHoursSnapshot

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
recipFlexHoursSnapshotID	BIGINT	8	No	System Generated	Primary key for RecipientFlexibleHoursSnapshot
recipientFlexibleHoursID	BIGINT	8	No	System Generated	Primary key for RecipientFlexibleHours
caseID	BIGINT	8	No	System Generated	Foreign key to CaseHeader.
serviceMonth	CHARACTER	10	No	N/A	Month for which Recipient Flexible hours are requested.
ServiceYear	STRING	4	No	N/A	Year in which the Flexible Hours are requested.
frequency	CHARACTER	10	No	N/A	Frequency of the Recipient Flexible Hours either On-Going or One-Time.
flexibleHoursEndDate	Date	4	No	N/A	End Date of the flexible hours when the Frequency is On-Going.
programType	CHARACTER	10	No	N/A	Recipient's program type, IHSS or WPCS
flexibleHoursRequested	INTEGER	4	Yes	N/A	Number of Additional Overtime hours approved by the County.
flexibleHoursApproved	INTEGER	4	Yes	N/A	Number of Additional Overtime hours requested by the Recipient.
requestDate	Date	4	No	N/A	Date on which Flexible Hours are requested.
approved	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Approved
deniedNotUnanticipated	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Denied – Need not unanticipated.
deniedNotImmediate	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Denied – Need not Immediate.
deniedNoHealthSafetyIssue	CHARACTER	1	No	N/A	Indicates whether the Recipient Flexible Hours is Denied – No Health or Safety Issue.
requestOutcomeDate	Date	4	Yes	N/A	Date of the county determined Outcome for the request of Recipient Flexible Hours
outcomeLetterDate	Date	4	Yes	N/A	Date of the county determined Outcome Letter for the request of Recipient Flexible Hours
cancellationLetterDate	Date	4	Yes	N/A	End Date of the county determined Outcome Letter for the request of Recipient Flexible Hours
comments	CHARACTER	1000	Yes	N/A	Comment field to be used by the county users.
recordStatus	CHARACTER	10	No	N/A	Status of the record. RST1 or RST2
createdOn	DATETIME	8	No	N/A	Audit Field - The record creation date-time stamp.
createdBy	CHARACTER	30	No	N/A	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	No	N/A	Audit Field - The record modified date-time stamp.
lastUpdatedBy	CHARACTER	30	No	N/A	Audit Field - The record modified by.
versionNo	INTEGER	4	No	N/A	System Generated – How many times the record got modified.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Unannounced Home Visit (UHV) Follow-up

Table – Table Name – UhvFollowup

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
uhvFollowupID	BIGINT	8	No	System Generated	
CaseID	BIGINT	8	Yes	System Generated	
unannouncedHomeVisit	BIGINT	8	Yes	System Generated	
followupType	CHARACTER	10	Yes	Create and Modify of Letter , Follow up and Final Phone call and follow and final Visit	
comments	VARCHAR	1000	Yes	Unannounced Home Visit –Comments	
actionDatetime	TIMESTAMP	8	Yes	Create and Modify of Letter , Follow up and Final Phone call and follow up and final Visit – Date Time	
followupOutcome	CHARACTER	10	Yes	follow up and final Visit – Outcome	
followupStatus	CHARACTER	20	Yes	Unannounced Home Visit – Status	
createdBy	CHARACTER	30	Yes	System generated – Audit Field	
createdOn	TIMESTAMP	8	Yes	System generated – Audit Field	
lastUpdatedBy	CHARACTER	30	Yes	System generated – Audit Field	
lastUpdatedOn	TIMESTAMP	8	Yes	System generated – Audit Field	
versionNo	INTEGER	1	No	System generated	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/IHSS Website Person Status

Table – Table Name: IHSSWebsitePersonStatus

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
IHSSWEBSITEPERSONSTATUSID	BIGINT	8	No	System Generated	Primary key for IhssWebsitePersonStatus table
CASEID	BIGINT	8	Yes	N/A	Foreign key to CaseHeader table
CONCERNROLEID	BIGINT	8	Yes	N/A	Foreign key to Person table
WEBSITEUSERNAME	VARCHAR	400	Yes	N/A	Codetable value from "IHSSWebsiteStatus" codetable
REGISTRATIONDATE	DATE	8	Yes	N/A	Registration Date from IHSS WebSite
STATUSDATE	DATE	8	Yes	N/A	Record Entered/Modified Date
COMMENTS	VARCHAR	1000	Yes	N/A	Comments Entered for Status Change
WEBSITESTATUS	CHARACTER	10	Yes	N/A	
CASEREference	CHARACTER	7	Yes	N/A	CaseReference from caseheader table
FROMDATE	DATE	8	Yes	N/A	
TODATE	DATE	8	Yes	N/A	
PROVIDERNUMBER	CHARACTER	18	Yes	NA	Provider Number
PERSONTYPE	CHARACTER	10	Yes	NA	Codetable for IHSSPersonType
CREATEDON	DATETIME	8	Yes	N/A	Audit Field - The record creation time stamp.
CREATEDBY	CHARACTER	30	Yes	N/A	Audit Field - The record created by.
LASTUPDATEDON	DATETIME	8	Yes	N/A	Audit Field - The record modified time stamp.
LASTUPDATEDBY	CHARACTER	30	Yes	N/A	Audit Field - The record modified by

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/IHSS Website Person Status History

Table – Table Name: IHSSWebsitePersonStatusHistory

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
IHSSWEBSITEPERSONSTATUSHI STORYID	BIGINT	8	No	System Generated	Primary key for IhssWebsitePersonStatusHistory table
IHSSWEBSITEPERSONSTATUSID	BIGINT	8	Yes	N/A	Foreign key to IhssWebsitePersonStatus table
CASEID	BIGINT	8	Yes	N/A	Foreign key to CaseHeader table
CONCERNROLEID	BIGINT	8	Yes	N/A	Foreign key to Person table
WEBSITEUSERNAME	VARCHAR	400	Yes	N/A	Codetable value from "IHSSWebsiteStatus" codetable
REGISTRATIONDATE	DATE	8	Yes	N/A	Registration Date from IHSS WebSite
STATUSDATE	DATE	8	Yes	N/A	Record Entered/Modified Date
COMMENTS	VARCHAR	1000	Yes	N/A	Comments Entered for Status Change
WEBSITESTATUS	CHARACTER	10	Yes	N/A	
CASEREference	CHARACTER	7	Yes	N/A	CaseReference from caseheader table
FROMDATE	DATE	8	Yes	N/A	
TODATE	DATE	8	Yes	N/A	
PROVIDERNUMBER	CHARACTER	18	Yes	NA	Provider Number
PERSONTYPE	CHARACTER	10	Yes	NA	Codetable for IHSSPersonType
CREATEDON	DATETIME	8	Yes	N/A	Audit Field - The record creation time stamp. Current dated
CREATEDBY	CHARACTER	30	Yes	N/A	Audit Field - The record created by from IHSSWebsitePersonStatus lastupdatedby field.
LASTUPDATEDON	DATETIME	8	Yes	N/A	Audit Field - The record modified time stamp.
LASTUPDATEDBY	CHARACTER	30	Yes	N/A	Audit Field - The record modified by

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/CMIPSCaseDocument

Table Name: CMIPSCaseDocument

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
documentID	BIGINT	8	No	System Generated	Primary key
caseID	BIGINT	8	Yes	N/A	Case id
CONCERNROLEID	BIGINT	8	No	N/A	Foreign key to ConcernRole table.
CASEREFERENCE	VARCHAR	40	Yes	N/A	Recipient ID
formType	VARCHAR	10	Yes	Form Name	Value from Code Table Upload Case Forms.
recordStatus	VARCHAR	10	Yes	N/A	Status of the record – RST1 or RST2.
comments	VARCHAR	256	Yes	Upload Case Attachment / Description	Upload Case Attachment / Description
DELETEREQUESTED	VARCHAR	1	No	NA	When user requests to delete the file, indicator for batch to pick up
DeleteRequestedBy	VARCHAR	30	Yes	NA	Username for the deleted request
DELETEREQUESTEDDATE	TIMESTAMP		Yes	NA	Timestamp when the user requests to delete the file.
UploadedDocumentName	VARCHAR	256	Yes	NA	Uploaded Document name with extension
DocumentName	VARCHAR	256	Yes	NA	Document name with extension
UPLOADSTATUS	VARCHAR	10	Yes	Status	UploadStatus Codetable - status of uploaded document - Uploaded, Scan Failed, Pending Scan
createdOn	DATETIME	8	Yes	Uploaded Date	Audit Field – The record creation time stamp.
createdBy	VARCHAR	30	Yes	Uploaded By	Audit Field – The record created by.
lastUpdatedOn	DATETIME	8	Yes	NA	Audit Field – The record modified time stamp.
lastUpdatedBy	VARCHAR	30	Yes	NA	Audit Field – The record modified time stamp.
versionNo	INTEGER	4	Yes	NA	System Generated – How many times the record modified.
LASTACTIONREQUESTEDDATE	DATETIME	8	Yes	NA	Timestamp when the user requests the file.
LASTACTIONREQUESTEDBY	VARCHAR	30	Yes	NA	Username for the request.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Recipient Message Center

Table – RecipientMessageCenter

Field Name	Data type	Size	Null	Screen Name – Field Name	Comments
RECIPIENTMESSAGECENTERID	BIGINT	8	N	N/A	Primary key for RecipientMessageCenter table
CASEID	BIGINT	8	Y	N/A	Foreign key to CaseHeader
CASEREFERENCE	CHARACTER	40	Y	N/A	Case number
MESSAGESUBJECT	CHARACTER	100	Y	N/A	Subject of the message
MESSAGECONTENT	VARCHAR	1000	Y	N/A	Content of the message
STATUSCODE	CHARACTER	10	Y	N/A	Code value of RecordStatus
MESSAGECREATEDTIMESTAMP	TIMESTAMP	10	Y	N/A	Created time stamp of the message
MESSAGECREATEDBY	CHARACTER	30	Y	N/A	Record created by
MESSAGEREAD	CHARACTER	1	N	N/A	Message read indicator
MESSAGEPRIORITY	CHARACTER	100	Y	N/A	Priority of the message
MESSAGEIMPORTANCE	CHARACTER	1	N	N/A	Importance of the message
MESSAGETYPE	CHARACTER	30	Y	N/A	Type of Message
CREATEDBY	CHARACTER	30	Y	N/A	Record created by
CREATEDON	TIMESTAMP	10	Y	N/A	Record creation time stamp
LASTUPDATEDBY	CHARACTER	30	Y	N/A	Record updated by
LASTUPDATEDON	TIMESTAMP	10	Y	N/A	Record updated time stamp
VERSIONNO	INTEGER	4	N	N/A	How many times the record is modified
MESSAGETYPE	CHARACTER	20	Y	N/A	Type of the message
FORMCONTENT	CHARACTER	100	Y	N/A	Content of the form
READDATE	TIMESTAMP	10	Y	N/A	Date the messages was read

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/CMIPSCASEDOCUMENTSNAPSHOT

Table Name: CMIPSCASEDOCUMENTSNAPSHOT

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
DOCUMENTSNAPSHOTID	BIGINT	8	No	System Generated	Primary key.
CONCERNROLEID	BIGINT	8	No	System Generated	Foreign key to ConcernRole table.
CASEID	BIGINT	8	Yes	N/A	Case ID
CASEREFERENCE	CHARACTER	40	Yes	N/A	Recipient ID
RECORDSTATUS	CHARACTER	10	Yes	N/A	Status of the record – RST1 or RST2.
COMMENTS	VARCHAR	256	Yes	Upload Provider Attachment /Description	Description of form provided by user.
CONCERNROLEID	BIGINT	8	No	System Generated	Foreign key to ConcernRole table.
FORMTYPE	CHARACTER	10	Yes	Form Name	Value from Code Table Upload Provider Forms.
UPLOADSTATUS	CHARACTER	10	Yes	Status	UploadStatus Codetable - status of uploaded document - Uploaded, Scan Failed, Pending Scan
UPLOADEDDOCUMENTNAME	VARCHAR	256	Yes	N/A	Uploaded Document name with extension.
DOCUMENTNAME	VARCHAR	256	Yes	N/A	Document name with extension.
LASTACTIONREQUESTEDDATE	TIMESTAMP	8	Yes	N/A	Timestamp when the user requests to the file.
LASTACTIONREQUESTEDBY	CHARACTER	30	Yes	N/A	Username for the request.
DOCUMENTID	BIGINT	8	Yes	System Generated	Document ID.
CREATEDBY	CHARACTER	30	Yes	Uploaded By	Audit Field – The record created by.
CREATEDON	TIMESTAMP	8	Yes	Uploaded Date	Audit Field – The record creation time stamp.
LASTUPDATEDBY	CHARACTER	30	Yes	N/A	Audit Field – The record modified time stamp.
LASTUPDATEDON	TIMESTAMP	8	Yes	N/A	Audit Field – The record modified time stamp.

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Eforms Data ID

Table – ConcernRoleEformsDataID

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
CONCERNROLEEFORMSDATAID	BIGINT	8	Y	N/A	
CASECONCERNROLEID	BIGINT	8	N	N/A	
CASEID	BIGINT	8	N	N/A	
CASEREFERENCE	CHARACTER	10	N	N/A	
PROVIDERCONCERNROLEID	BIGINT	8	N	N/A	
PROVIDERNUMBER	CHARACTER	10	N	N/A	
RECORDSTATUS	CHARACTER	30	N	N/A	
SENTTO	CHARACTER	30	N	N/A	
TEMPLATEID	BIGINT	8	N	N/A	
FORMVERSION	INTEGER	1	N	N/A	
ASSIGNEDTO	CHARACTER	30	N	N/A	
APPROVEDBY	CHARACTER	30	N	N/A	
REJECTEDBY	CHARACTER	30	N	N/A	
SUBMITTEDBY	CHARACTER	30	N	N/A	
EXTERNALID	BIGINT	8	N	N/A	
LOCALEIDENTIFIER	CHARACTER	10	N	N/A	
PDFLINK	VARCHAR	700	N	N/A	
WEBFORMLINK	VARCHAR	700	N	N/A	
FORMDATA	VARCHAR	700	N	N/A	
FORMNAME	VARCHAR	100	N	N/A	
CREATEDBY	CHARACTER	30	N	N/A	
CREATEDON	TIMESTAMP	8	N	N/A	
LASRUPDATEDBY	CHARACTER	30	N	N/A	
LASTUPDATEDON	TIMESTAMP	8	N	N/A	
VERSIONNO	INTEGER	1	N	N/A	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Eforms Data Snapshot

Table – CONCERNROLEEFORMSDATASNAPSHOT

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
CONCERNROLEEFORMSDATASNAPSHOTID	BIGINT	8	N	N/A	
CONCERNROLEEFORMSDATAID	BIGINT	8	N	N/A	
CASECONCERNROLEID	BIGINT	8	Y	N/A	
CASEID	BIGINT	8	Y	N/A	
CASEREFERENCE	CHARACTER	10	Y	N/A	
PROVIDERCONCERNROLEID	BIGINT	8	Y	N/A	
PROVIDERNUMBER	CHARACTER	10	Y	N/A	
RECORDSTATUS	CHARACTER	30	Y	N/A	
SENTTO	CHARACTER	30	Y	N/A	
TEMPLATEID	BIGINT	8	Y	N/A	
FORMVERSION	INTEGER	1	Y	N/A	
ASSIGNEDTO	CHARACTER	30	Y	N/A	
APPROVEDBY	CHARACTER	30	Y	N/A	
REJECTEDBY	CHARACTER	30	Y	N/A	
SUBMITTEDBY	CHARACTER	30	Y	N/A	
EXTERNALID	BIGINT	8	Y	N/A	
LOCALEIDENTIFIER	CHARACTER	10	Y	N/A	
PDFLINK	VARCHAR	700	Y	N/A	
WEBFORMLINK	VARCHAR	700	Y	N/A	
FORMDATA	VARCHAR	700	Y	N/A	
FORMNAME	VARCHAR	100	Y	N/A	
CREATEDBY	CHARACTER	30	Y	N/A	
CREATEDON	TIMESTAMP	8	Y	N/A	
LASRUPDATEDBY	CHARACTER	30	Y	N/A	
LASTUPDATEDON	TIMESTAMP	8	Y	N/A	
MESSAGEREAD	VARCHAR	1	Y	N/A	
HIGHPRIORITYIND	CHARACTER	1	N	N/A	
ACTIONDATE	DATE	4	Y	N/A	

DSD 25/Recip CM & OS – Case Maintenance/Database Entities/Concern Role Eforms Data

Table – CONCERNROLEEFORMSDATA

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
CONCERNROLEEFORMSDATAID	BIGINT	8	N	N/A	
CASECONCERNROLEID	BIGINT	8	Y	N/A	
CASEID	BIGINT	8	Y	N/A	
CASEREFERENCE	CHARACTER	10	Y	N/A	
PROVIDERCONCERNROLEID	BIGINT	8	Y	N/A	
PROVIDERNUMBER	CHARACTER	10	Y	N/A	
RECORDSTATUS	CHARACTER	30	Y	N/A	
SENTTO	CHARACTER	30	Y	N/A	
TEMPLATEID	BIGINT	8	Y	N/A	
FORMVERSION	INTEGER	1	Y	N/A	
ASSIGNEDTO	CHARACTER	30	Y	N/A	
APPROVEDBY	CHARACTER	30	Y	N/A	
REJECTEDBY	CHARACTER	30	Y	N/A	
SUBMITTEDBY	CHARACTER	30	Y	N/A	
EXTERNALID	BIGINT	8	Y	N/A	
LOCALEIDENTIFIER	CHARACTER	10	Y	N/A	
PDFLINK	VARCHAR	700	Y	N/A	
WEBFORMLINK	VARCHAR	700	Y	N/A	
FORMDATA	VARCHAR	700	Y	N/A	
FORMNAME	VARCHAR	100	Y	N/A	
CREATEDBY	CHARACTER	30	Y	N/A	
CREATEDON	TIMESTAMP	8	Y	N/A	
LASRUPDATEDBY	CHARACTER	30	Y	N/A	
LASTUPDATEDON	TIMESTAMP	8	Y	N/A	
MESSAGEREAD	VARCHAR	1	Y	N/A	
HIGHPRIORITYIND	CHARACTER	1	N	N/A	
ACTIONDATE	DATE	4	Y	N/A	

DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions

This section will document the high-level business classes that will be developed to support the CMIPS business processes. Examples of these are the IHSS SOC calculation or the class definitions for the SAVE business process.

Another definition of a business class is the core application classes that will be developed for the CMIPS Application. The definition of a business class is based on the Unified Modeling Language (UML) definition. This section of the DSD will contain both UML class diagrams and UML object interaction diagrams.

At a high-level each business class definition will include the following:

- Class Attributes – name, type, visibility, multiplicity, initial value
- Class Operations – name, return type, return value, scope
- Class Parameters – name, type, default values

At a high-level each class operation definition will include the following:

- Specification
- Methods
- Parameters
- Exceptions
- Constraints
- Visibility

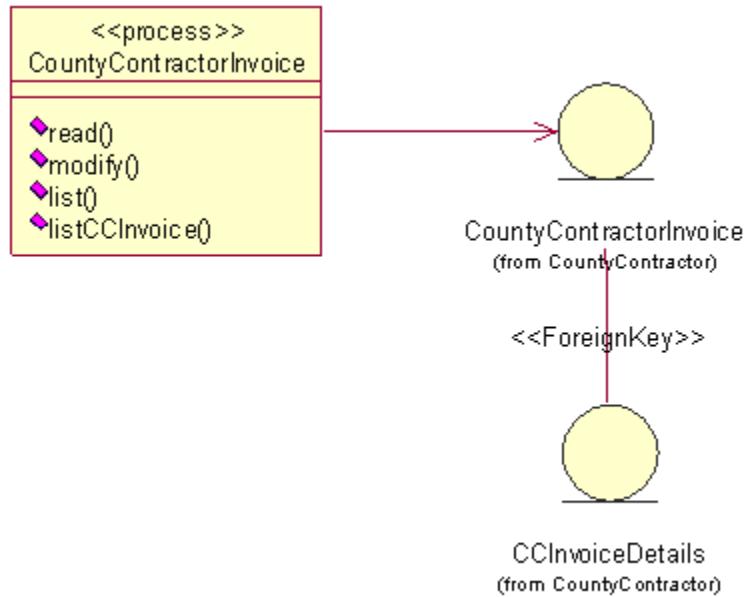
DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/WPCS Hours



Operations

Class	Operation	Description	Exceptions
WPCS Hours	read()	Will query Case WPCS Hours table to retrieve the WPCS hours' records for a particular Recipient case.	
WPCS Hours	list()	Will query Case WPCS Hours table to retrieve list of WPCS hours' records for a particular Recipient case.	
WPCS Hours	create()	Will create a record in the Case WPCS Hours table.	
WPCS Hours	modify()	Will update the existing record in the Case WPCS Hours.	

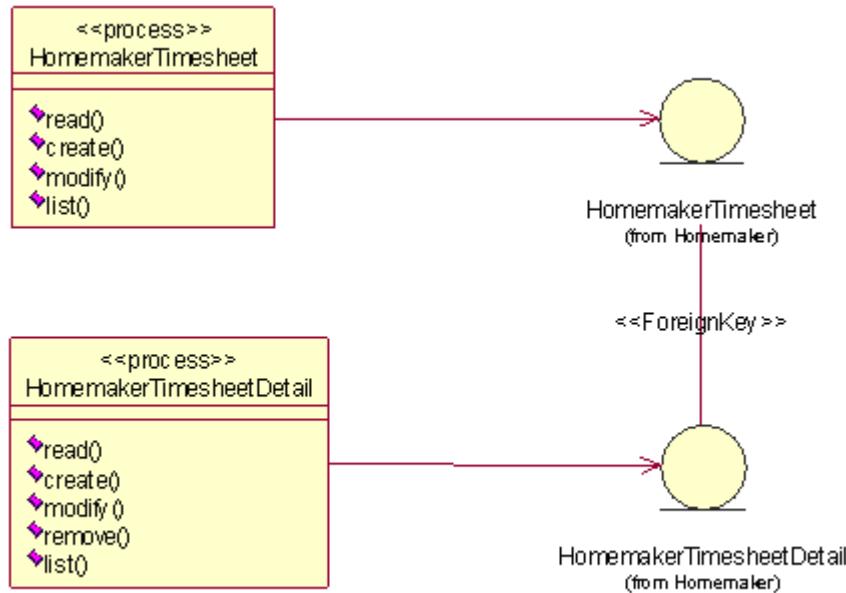
DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/County Contractor Invoice



Operations

Class	Operation	Description	Exceptions
County Contractor Invoice	read()	Will query County Contractor Invoice table to retrieve the Contractor Invoice records for a particular contractor.	
County Contractor Invoice	modify()	Will update the County Contractor Invoice table for the given record for a particular contractor.	
County Contractor Invoice	list()	Will query County Contractor Invoice table to retrieve a list of the Contractor Invoice records for a particular contractor.	
CC Invoice Details	List CC Invoice()	Will query CC Invoice Details table to retrieve a list of the Contractor Invoice details records for a particular contractor.	

DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Homemaker Timesheet



Operations

Class	Operation	Description	Exceptions
Homemaker Timesheet	read()	Will query Homemaker Timesheet table to retrieve a single Homemaker Timesheet record for a particular Homemaker.	
Homemaker Timesheet	create()	Will create a record in the Homemaker Timesheet table.	
Homemaker Timesheet	modify()	Will update the Homemaker Timesheet table for the existing Homemaker timesheet record.	
Homemaker Timesheet	list()	Will query the Homemaker Timesheet table to retrieve a list of the Homemaker Timesheet details for a particular Homemaker.	
Homemaker Timesheet Detail	list()	Will query Homemaker Timesheet Detail table to retrieve a single Homemaker Timesheet details record for a particular Homemaker.	
Homemaker Timesheet Detail	create()	Will create a new record in the Homemaker Timesheet Detail table.	
Homemaker Timesheet Detail	modify()	Will update the Homemaker Timesheet Detail table for the existing Homemaker Timesheet record.	
Homemaker Timesheet Detail	remove()	Will delete a record from the Homemaker Timesheet Detail table for a selected Homemaker Timesheet.	
Homemaker Timesheet Detail	list()	Will query the Homemaker Timesheet Detail table to retrieve a list of the Homemaker Timesheet detail for a particular Homemaker.	

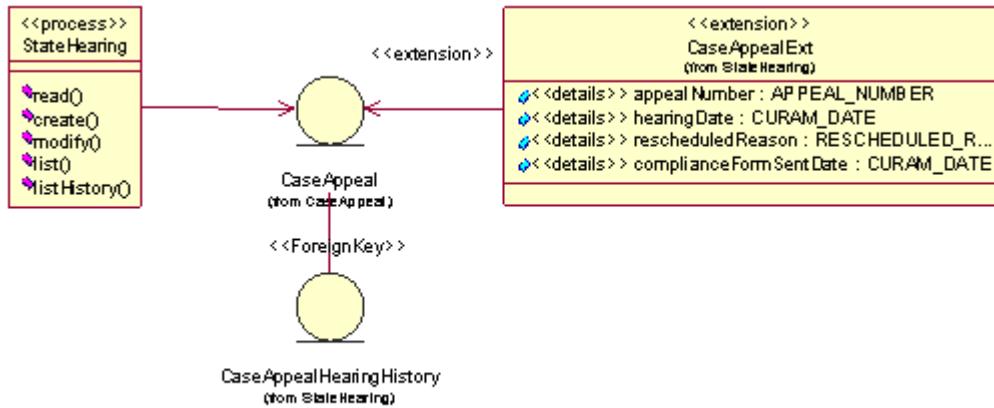
DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Workplace Hours



Operations

Class	Operation	Description	Exceptions
Workplace Hours	read()	Will query Workplace Hours table to retrieve the Workplace Hours records for a particular case.	
Workplace Hours	create()	Will create a new record in the Workplace Hours table.	
Workplace Hours	modify()	Will update the Workplace Hours table for the existing record.	
Workplace Hours	list()	Will retrieve a list of the Workplace Hours for a particular case.	

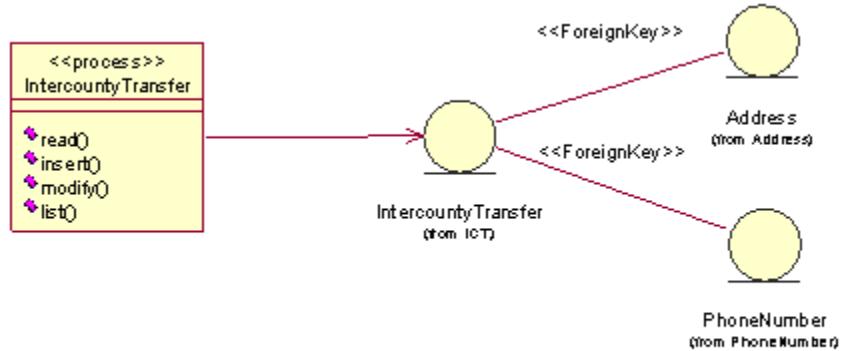
DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/State Hearing



Operations

Class	Operation	Description	Exceptions
State Hearing	read()	Will query Case Appeal table to retrieve the Case Appeal records for a particular case.	
State Hearing	create()	Will create a new record in the Case Appeal table.	
State Hearing	modify()	Will update the existing record in the Case Appeal table.	
State Hearing	list()	Will query Case Appeal table to retrieve a list of the Case Appeal records for a particular case.	

DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Inter-County Transfer



Operations

Class	Operation	Description	Exceptions
Inter-County Transfer	read()	Will query Inter-County Transfer table to retrieve single Inter-County Transfer records for a particular case.	
Inter-County Transfer	insert()	Will create a new record in the Inter-County Transfer table.	
Inter-County Transfer	modify()	Will update the existing record in the Inter-County Transfer table.	
Inter-County Transfer	list()	Will query Inter-County Transfer table to retrieve a list of Inter-county Transfer records for a particular case.	

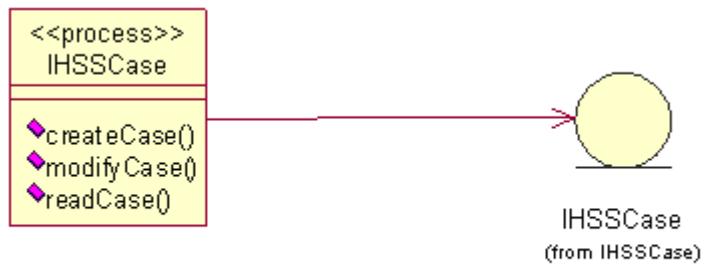
DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/IHSS Notification to SAWS



Operations

Class	Operation	Description	Exceptions
SAWS Notification	create()	Will create a new record in the SAWS Notification table.	

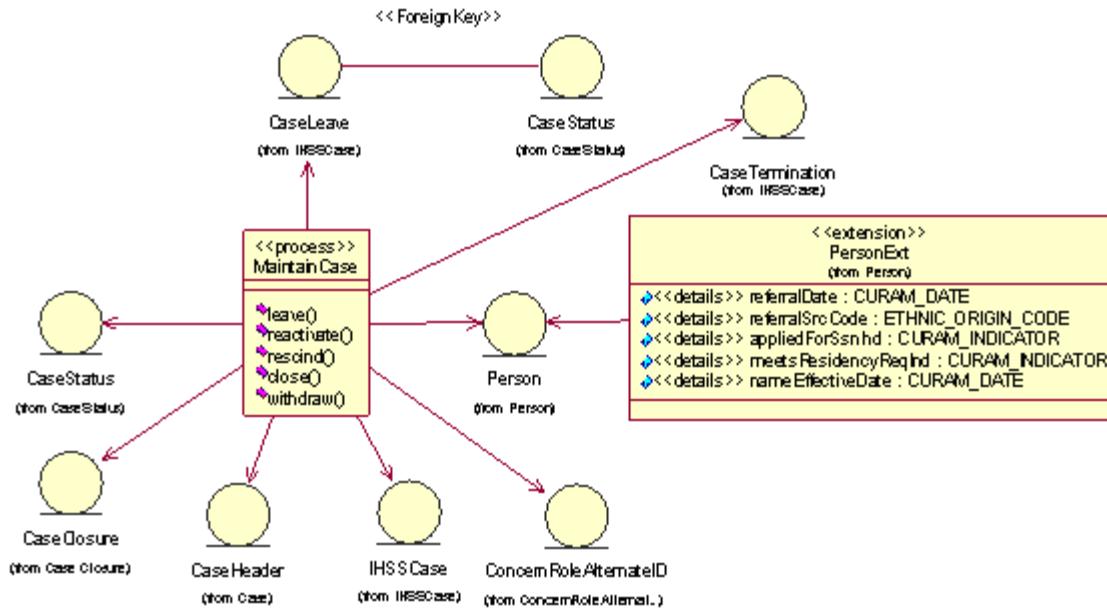
DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Case Home



Operations

Class	Operation	Description	Exceptions
Maintain IHSS Case	Create Case()	Will create a record in the IHSS Case table for a new case.	
Maintain IHSS Case	Read Case()	Will query the IHSS Case table to retrieve a case record.	
Maintain IHSS Case	Modify Case()	Will update the record in IHSS Case table for a modified case.	

DSD 25/Recip CM & OS – Case Maintenance/Business Class Definitions/Case Maintenance – Withdraw, Leave, Reactivate, Rescind, Terminate



Operations

Class	Operation	Description	Exceptions
Maintain Case	leave()	Apply leave for existing Recipient case.	
Maintain Case	reactivate()	Reactivate case Recipient case.	
Maintain Case	rescind()	Rescind terminated/declined Recipient case.	
Maintain Case	close()	Close/terminate Recipient case.	
Maintain Case	withdraw()	Withdraw any un-approved application.	