DSD - Section 26

D-4.2-03 – IHSS CMIPS Detailed System Design (DSD) (R2025.03.01) Section 26

Version 1.0

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DSD 26/Recip CM & OS – Program Management, Fraud

DSD 26/Recip CM & OS – Program Management, Fraud /Program Management, Fraud Topic Area

The CMIPS Program Management and Fraud topic area will discuss the CMIPS functionality associated with the overall program management for CMIPS including the organization, users, tasks and notifications as well as items related to the monitoring of fraud. The CMIPS Program Management and Fraud topic area will define, in detail, the detailed system functions associated with these activities.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Program Management and Fraud

CI	Document Name
CI-67513 - DSD BF Program Management and Fraud IMPLEMENTED	DSD_BF_Program_Management_and_Fraud.doc

The business process function for County Case Management encompasses the following processes within CMIPS:

- Maintain Organization
- Reassign Case
- Reassign Group of Cases
- Task Management
- Notification Management
- Case Approval Processing
- DHCS Interface Processing
- Quality Assurance Reporting
- Targeted Mailings

The following diagrams depict the business process flows for each of these functions within CMIPS.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Business Process Function – Maintain Organization

CI	Document Name
CI-116194 - DSD BF Maintain Organization IMPLEMENTED	DSD_BF_Maintain_Organization.doc

Each county's organization structure will be configured within the CMIPS system. This structure will be maintained by the CGI staff based upon information obtained from the counties. This organization structure supports two primary functions with CMIPS:

Enables maintenance of cases based upon a Social Worker, District Office and County

Enables the escalation of tasks for supervisor approval

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Business Process Function – Task and Notification Management

CI	Document Name
CI-67510 - DSD BF Task and Notification Management IMPLEMENTED	DSD_BF_Task_and_Notification_Management.doc

Each task and notification produced within CMIPS is defined within DSD Section 30 – Tasks and Notification. These tasks and notifications can be modified throughout the life of the system through the change request process. Tasks may be assigned to a specific user or assigned to a work queue where a group of users may select the task to be completed. Tasks may also be defined to be escalated should the required action not be completed within a specified time frame. Each task may have a unique escalation process defined. These escalation strategies may encompass up to four hierarchical levels for approval. This escalation strategy may depend upon the organizational structure defined for the county.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Business Process Function – Medi-Cal Service Match Interface

CI	Document Name
CI-67516 - DSD BF MediCal Service Match Interface IMPLEMENTED	DSD_BF_MediCal_Service_Match_Interface.doc

Every month CMIPS will receive an electronic file from the Department of Health Care Services (DHCS) that contains data for IHSS Recipients who had Long Term Care or In-Patient paid claims in the same timeframe that there was a paid claim for IHSS services.

A Business Process Object (BPO) will be created to process the data and assign a task to the Quality Assurance (QA) task queue for each case that had records in the Medi-Cal Service Match interface file where the stay is greater than two days or does not have an end date.

If the task is not reserved by a QA worker within five (5) business days, the task will be escalated to a QA supervisor for follow-up actions.

The BPO will also create a paid claim investigation record in the database in a pending status. The QA worker will be able to see these records on the Paid Claims List screen. The QA worker will be able to update the Paid Claim with investigation outcome results from the Modify Paid Claim screen. Other workers with appropriate security will have the ability to access the View Paid Claim screen to review data and investigation outcomes.

Each month the In-Patient Hospitalization/Long Term Care Stay Payment Review Report will be generated that will list the paid claims created or updated in that month and their current outcome information.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Business Process Function - CDPH Interface for Death Match

CI	Document Name
CI-67508 - DSD BF CDPH Interface for Death Match IMPLEMENTED 67,508	DSD_BF_CDPH_Interface_for_Death_Match.doc

The following defines the Business Process for the California Department of Public Health (CDPH) Death Match processing within CMIPS.

Step 1: CMIPS will receive an electronic file from CDPH containing death match data on a monthly basis. A new Interface Business Process Service (BPS) will process the CDPH file and transform the data into an XML format.

Step 2: A new Case Management BPO program will process the XML data and find the reported individual in the CMIPS system matching by Social Security Number (SSN). Death notifications that cannot be matched to a CMIPS person will be ignored. When a match is found, the BPO will perform the following checks:

If there is no record in the CDPH Death Match entity for this SSN and the Person's Date of Death is not populated, a new record will be created, a task will be generated to the Case Owner, the Person's record Death Outcome will be set to "Pending," the Death Notification Source to "CDPH;" if the Person's Date of Death is populated, the notification will be ignored and no tasks will be generated.

If there is a record in the CDPH Death Match entity for this SSN and the new CDPH notification date is the same or before the previously reported date of death, the notification will be ignored and no tasks will be generated.

If there is a record in the CDPH Death Match entity for this SSN and the new CDPH notification date is after the previously reported date of death and the Person's Date of Death is not populated, the record will be updated with the new CDPH information, a new task will be generated to the Case Owner, the Person's record Death Outcome will be set to "Pending," the Death Notification Source to "CDPH;" if the Person's Date of Death is populated, the CDPH notification will be ignored.
CDPH notifications that cannot be matched to a CMIPS Recipient or Provider will be ignored.

Step 3: Upon new record creation or record update, a new Task will be created and

If the match is a Person Type "Applicant" or "Recipient" the Case Owner will be notified

If the match is a Person Type "Provider" the Case Owner of each Recipient Case to which an "Active" Provider record is associated will be notified

The task will then follow the CMIPS aging process. The task will contain a link to the CDPH Death Match screen.

Step 4: The Case Owner will investigate the death notification, and then manually indicate the Death Outcome on the Person Home screen with one of the following Person Record Death Outcomes:

- Pending
- Not Deceased – Payee Met, Social Security card & ID viewed
- Not Deceased – Payee Met, Social Security card & ID on file
- Deceased – No overpayment
- Deceased – Overpayment, recovery initiated
- Deceased – Overpayment, fraud referral initiated

Step 5: The following user actions will occur once the death investigation is completed:

If the deceased person is a Referral:

- And the Outcome is "Deceased:"
  - On the Modify Person Home Screen – Retain or update the Date of Death and set the Death Outcome to the appropriate Deceased reason depending upon if an overpayment is determined
  - On the Case Home Screen select Close Referral
- Or the Outcome is "Not Deceased"
  - On the Modify Person Home Screen – Clear the Date of Death and set the Death Outcome to "Not Deceased". User may also update Person Notes with information relating to Death Verification interaction.

If the deceased person is an Applicant:

- And the Outcome is "Deceased:"
  - On the Modify Person Home Screen – Retain or update the Date of Death and set the Death Outcome to the appropriate Deceased reason depending upon if an overpayment is determined
  - On the Case Home Screen – Withdraw Case with Withdraw Case Reason – Death
- Or the Outcome is "Not Deceased"
  - On the Modify Person Home Screen – Clear the Date of Death and set the Death Outcome to "Not Deceased." User may also update Person Notes with information relating to Death Verification interaction.

If the deceased person is a Recipient:

- And the Outcome is "Deceased:"

    - On the Modify Person Home Screen – Retain or update the Date of Death and set the Death Outcome to the appropriate Deceased reason depending upon if an overpayment is determined
    - On the Case Home Screen – Terminate Case with Terminated Case Reason – Recipient Death
    - System will auto-terminate all Active Status Provider records with Termination Reason – "Recipient Death"
- Or the Outcome is "Not Deceased"
    - On the Modify Person Home Screen – Clear the Date of Death and set the Death Outcome to "Not Decease". User may also update Person Notes with information relating to Death Verification interaction.

If the deceased person is a Provider:

- And the Outcome is "Deceased:"
    - On the Modify Person Home screen – Retain or update Death Date, set Death Outcome to the appropriate Deceased reason depending upon if an overpayment is determined
    - The system will set Provider Status to Terminated, set Provider Termination Reason to "Provider Death"
- Or the Outcome is "Not Deceased"
    - On the Person Home Screen – Clear the Date of Death set the Death Outcome to "Not Deceased." User may also update Person Notes with information relating to Death Verification interaction.
    - CMIPS will generate a notification to the Case Owner of each Recipient Case to which an "Active" Provider record is associated that the death of the Provider has been confirmed.
    - CMIPS shall not allow the "Reactivate Case" action if the Person Record Death Outcome is "Death Confirmed."

If a person has multiple roles, for example Recipient and Provider, the Case Owner will perform the above user actions for each role.

A new business rule will be created to not allow a Recipient-Provider relationship to be created if the Provider is confirmed to be dead.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Business Process Function - SCO Interface for Death Match

CI	Document Name
CI-67512 - DSD BF SCO Interface for Death Match IMPLEMENTED	DSD_BF_SCO_Interface_for_Death_Match.doc

The following defines the business process for the State Controller's Office (SCO) Interface for Death Match within CMIPS.

Note: This solution does not cover death notifications received from the Department of Health Care Services (DHCS-MEDS) or the California Department of Public Health (CDPH).

Step 1: CMIPS will receive an electronic file from SCO containing death match data on a monthly basis. If necessary, Business Process Server (BPS) will transform the SCO file data into an XML format.

Step 2: A new Case Management Business Process Object (BPO) will process the XML data and store the data in a new database entity, called SCO Data Match. The BPO will then use the CMIPS Case Number and the Decedent's SSN provided in the interface transactions to perform the following checks and functions:

For this SSN, check the Person entity for existing Death Notification Source, Date of Death, Death Outcome information:

If information is found and Death Outcome indicates Deceased then write the outcome information to the SCO Data Match entity to be reported back to SCO.

If information is found and Death Outcome indicates the individual is not deceased then compare SCO reported Date of Death and if the SCO reported date is equal to or earlier than the information in the Person entity then write the outcome information to the SCO Data Match entity to be reported back to SCO.

If information is found and Death Outcome is Pending and the source is other than SCO this item should be linked to the existing record and updated with the current outcome information and any future updates to be reported back to SCO.

If information is found and the Outcome indicates the individual is not deceased then compare SCO reported Date of Death and if the SCO reported date is more current than the information in the existing record then create a new Pending Death Match entry for QA investigation for this SSN where a Pending Data Match record does not already exist. All warrant rows should be linked to the appropriate record so that outcome update can be reported back to SCO at the warrant detail level.

Do not create a new Death Match entry for this SSN where a Pending Death Match entry already exists for the deceased individual. This new item should be linked to the existing record and updated with the current outcome information and any future updates.

Create a new Pending Death Match entry for QA investigation for this SSN where a Pending Data Match entry does not already exist. All warrant rows should be linked to the appropriate record so that outcome update can be reported back to SCO at the warrant detail level.

Upon creation of a Pending SCO Reported Death Match entry, a new task will be created and assigned to the county's Quality Assurance (QA) task queue by case number and SSN for each county where that individual is an active Recipient or Provider. If the task is not reserved by a QA worker within two business days, it will be escalated to a supervisor. Once the task is reserved, the item will be updated with the QA worker's number and the task will follow the CMIPS aging process.

Step 3: The QA worker will review the death match entry by navigating to the Person Home screen. When the QA worker completes investigation of the reported death they will update the appropriate information and outcome on the Modify Person screen. Outcome details will be written to the linked warrant records for reporting to SCO.

Step 3a: If the record is for a Provider, the QA Worker(s) and Case Owner(s) in each county in which the Provider is active will receive a notification once any county confirms the Provider is deceased. Refer to business function process for CDPH Death Match for Case Owner processing of Person Death Match.

Step 3b: If the record is for a Recipient, the Case Owner will receive notification that Death has been confirmed. Refer to business function process for CDPH Death Match for Case Owner processing of Person Death Match.

Step 4: Each month a SCO Death Match Response Report will be created for CDSS QA at the time the interface reports outcomes at the warrant detail level back to SCO.

Step 4a: A new monthly BPO will upload the unreported and pending death match investigation data, containing SCO Death Match information from the Person records, to the Reports database. Adjudicated records will be included on the report one time only.

Step 4b: A new monthly BPO will create an XML file of the unreported and pending death SCO death match investigation data from the SCO Data Match entity. This information will be reported back to SCO at the warrant detail level that SCO provided. After the file is transmitted via interface, the BPO will mark any adjudicated death match records as reported. Adjudicated records will be included on the interface one time only.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Business Process Function – Targeted Mailings

CI	Document Name
CI-80464 - DSD BF Targeted Mailing IMPLEMENTED	DSD_BF_Targeted_Mailing.doc

Pursuant to AB 19 Section 12305.7 (h), CDSS will distribute quarterly targeted program integrity mailings to inform Recipients and/or Providers of appropriate program rules and requirements and consequences for failure to adhere to them. The criteria to select the population to receive these mailings are dynamic in nature and will be determined by CDSS each quarter.

The following describes the proposed business process for targeted mailings:

CDSS will provide to CGI a file containing the following information for a targeted mailing:

- Case Number
- Provider Number
- Criteria for the targeted mailing (50 characters)

CDSS may request the support of CGI to produce this file based upon specific ad hoc criteria. This request may be a separate change request and is not included in the following estimate or design.

Based upon this targeted mailing input file, a file of Recipient and/or Provider addresses will be created for printing of a 'slip page' at the HP Print Center. A 'slip page' is a blank sheet of paper with the name and address for inserting into a window envelope for mailing.

CDSS will provide the content of the insert to be included with each 'slip page' for mailing.

HP Print Center will insert and mail the targeted mailings based upon the address print file and the insert provided by CDSS.

For each targeted mailing identified on the input file, a record will be stored in the CMIPS database to identify the Recipient case, Provider, date and criteria for the mailing.

A new screen will display for each Recipient case any associated targeted mailings.

Targeted mailing data will be made available within the Sample and Query Tool to allow CDSS to query cases which have received a targeted mailing.

The Sample and Query Tool will have the ability to generate a random sample of a specific targeted mailing in order to determine a population for unannounced home visits (UHVs).

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process/Supervisor Workspace

CI	Document Name
CI-813202 - DSD BP Supervisor Workspace IMPLEMENTED	DSD_BP_Supervisor_Workspace.docx

The Supervisor Workspace and Role

The Cúram Supervisor Workspace allows supervisors to manage caseloads and tasks for users who report to them. Much of the functionality provided for managing cases, users, organization units and work queues is based upon task actions.

Many of the screens in the supervisor workspace are list screens. On any screen which lists more than 25 or 50 items, the user must use the "Next" and "Previous" links to scroll through the list of items displayed.

Supervisor Workspace

When a user with the "CASEMANAGEMENTSUPERVISOR" Security Group of the PROGRAMMGMTROLE security role logs-on through the CMIPS the web portal and then selects the "Case Management Workspace" a workspace displays with two (2) new tabs. Each of these new tabs will be preceded with "SW –". The new tab are:

- SW – Home
- SW – Teams and Workloads
- Caseload by User

The default landing page will always be the "SW – Home". Supervisors and all other users will continue to see the tabs currently available in the CMIPS application to the right of the SW tabs:

- My Workspace
- My Cases
- Inbox

These tabs will display in the order above to the right of the SW tabs across the top of the screen.

When accessed the SW – Home screen displays the following clusters:

- My Organization Unit – The organization unit to which the supervisor is associated
- Tasks – Displays the tasks assigned to the supervisor or allows the supervisor to create a new task for themselves or another user
- Assigned Workload – A list of all users reporting to the supervisor and the number of active cases (Pending, Eligible, Presumptive Eligible or Leave status)
- My Work Queues – The work queues to which the supervisor is subscribed
- Recent Notifications – Displays recent notifications to the supervisor

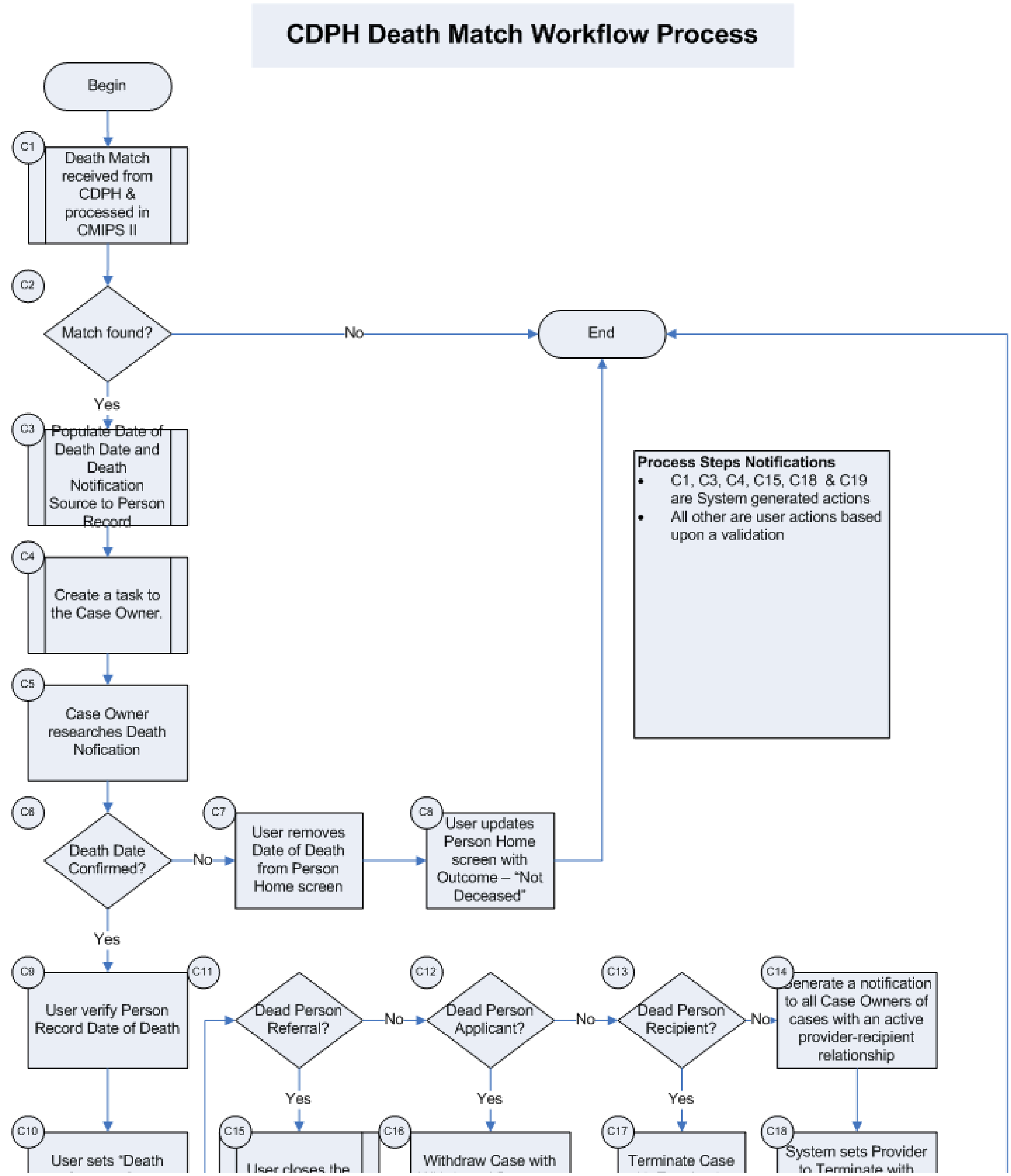
The purpose of each of these clusters is to provide overview information and a link to each individual workspaces within the Supervisor Workspace. For example, in the Assigned Workload cluster, a Name link immediately displays the User Workspace for the user name selected.

Workspaces are available to aid in assessing the workload of the supervisor or those assigned to the supervisor. Workspaces provide both at-a-glance overviews and more detailed lists such as a view of all tasks due on a particular day. Each workspace enables the supervisor to focus on particular tasks. For example, the supervisor might want to assess a user's workload for this week, and will therefore view all tasks reserved by the user that are due in the next week. These focused views aid the supervisor in assessing workloads and can highlight priority tasks that should be completed urgently. Drilling down from workspaces gives more detailed information, enabling the supervisor to reassign cases and tasks, and to monitor the progress.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/CDPH Death Match Workflow

CI	Document Name
CI-117887 - DSD BP CDPH Death Match Workflow Process IMPLEMENTED	DSD_BP_CDPH_Death_Match_Workflow_Process.doc



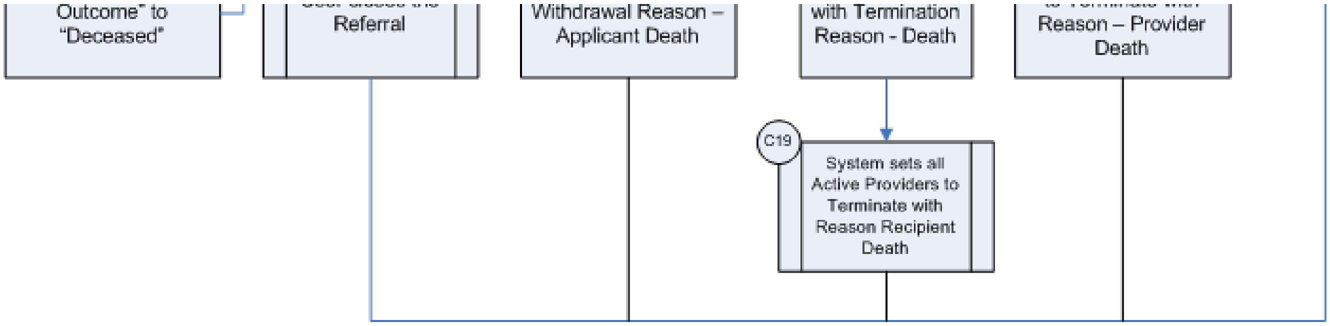


Figure – CDPH Death Match Workflow Process

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/County Organization

CI	Document Name
CI-116224 - DSD BP Sample County Organization IMPLEMENTED	DSD_BP_Sample_County_Organization.doc

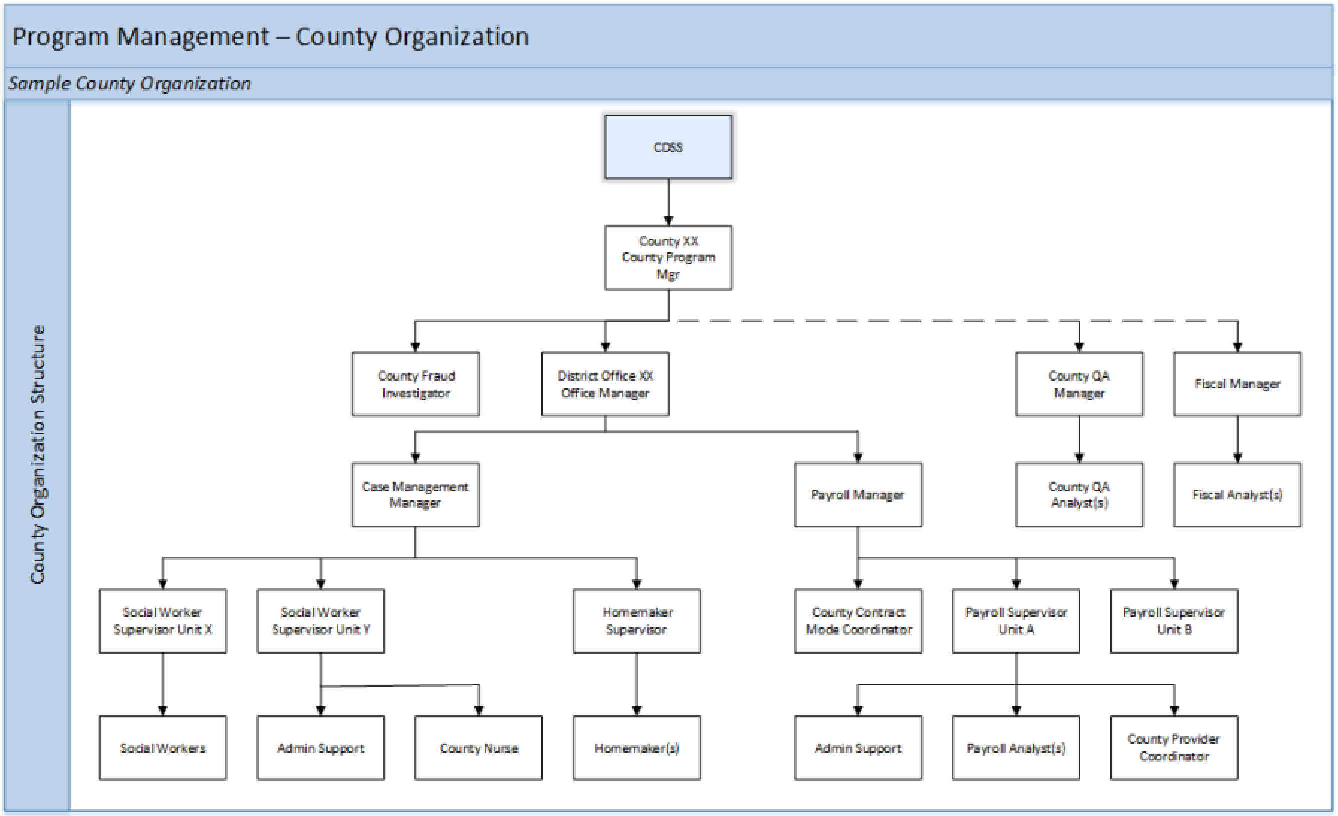


Figure - Sample County Organization

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Location Security

CI	Document Name
CI-116225 - DSD BP Sample Locations Structure IMPLEMENTED	DSD_BP_Sample_Locations_Structure.doc

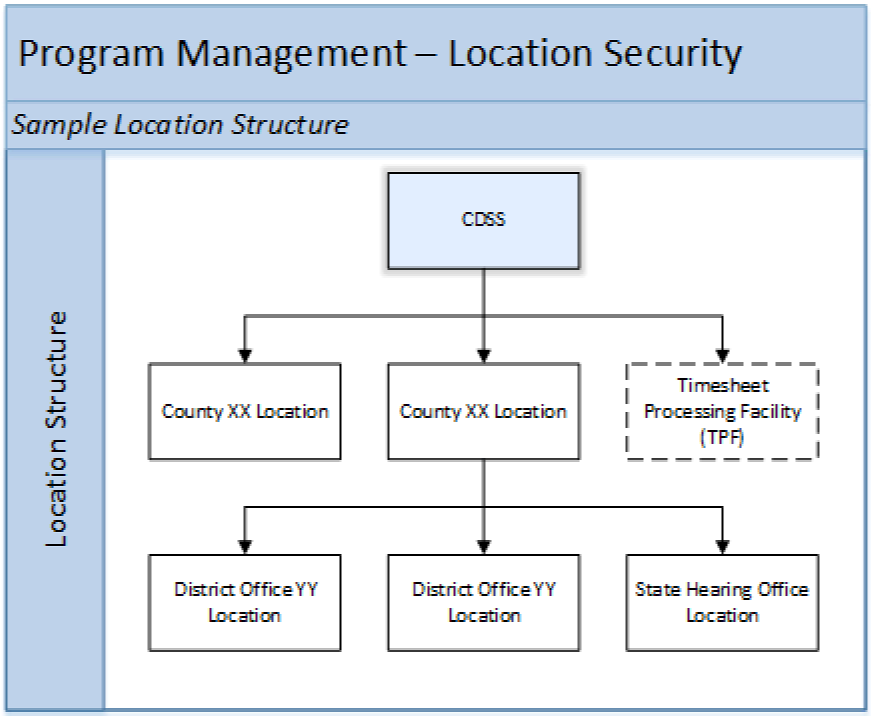


Figure - Sample Locations Structure

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Task Management Queue

CI	Document Name
CI-116227 - DSD BP Task Management Queue IMPLEMENTED	DSD_BP_Task_Management_Queue.doc

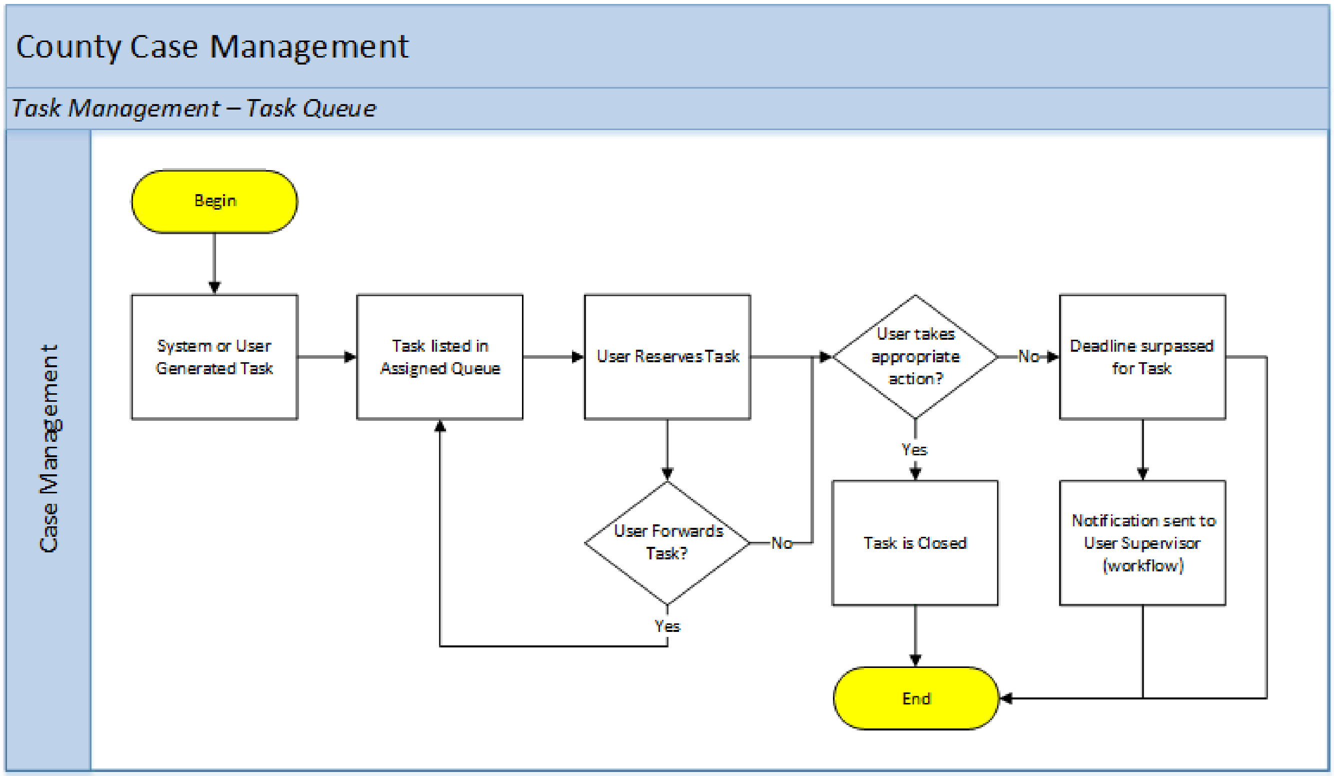


Figure - Task Management - Queue

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/User Assigned Task

CI	Document Name
CI-116228 - DSD BP Task Management User Assigned Task IMPLEMENTED	DSD_BP_Task_Management_User_Assigned_Task.doc

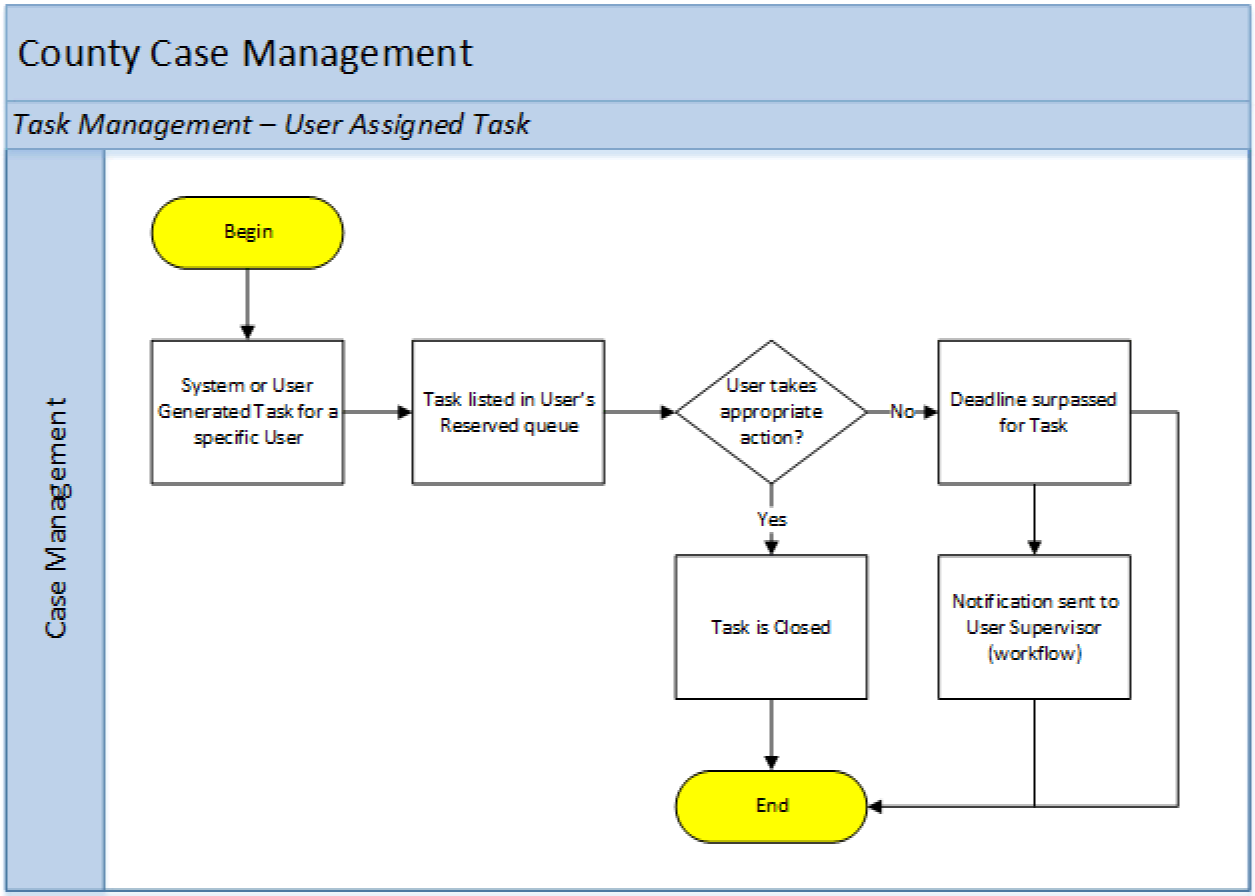


Figure - Task Management – User Assigned Task

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Notification Management

CI	Document Name
CI-116217 - DSD BP Notification Management IMPLEMENTED	DSD_BP_Notification_Management.doc

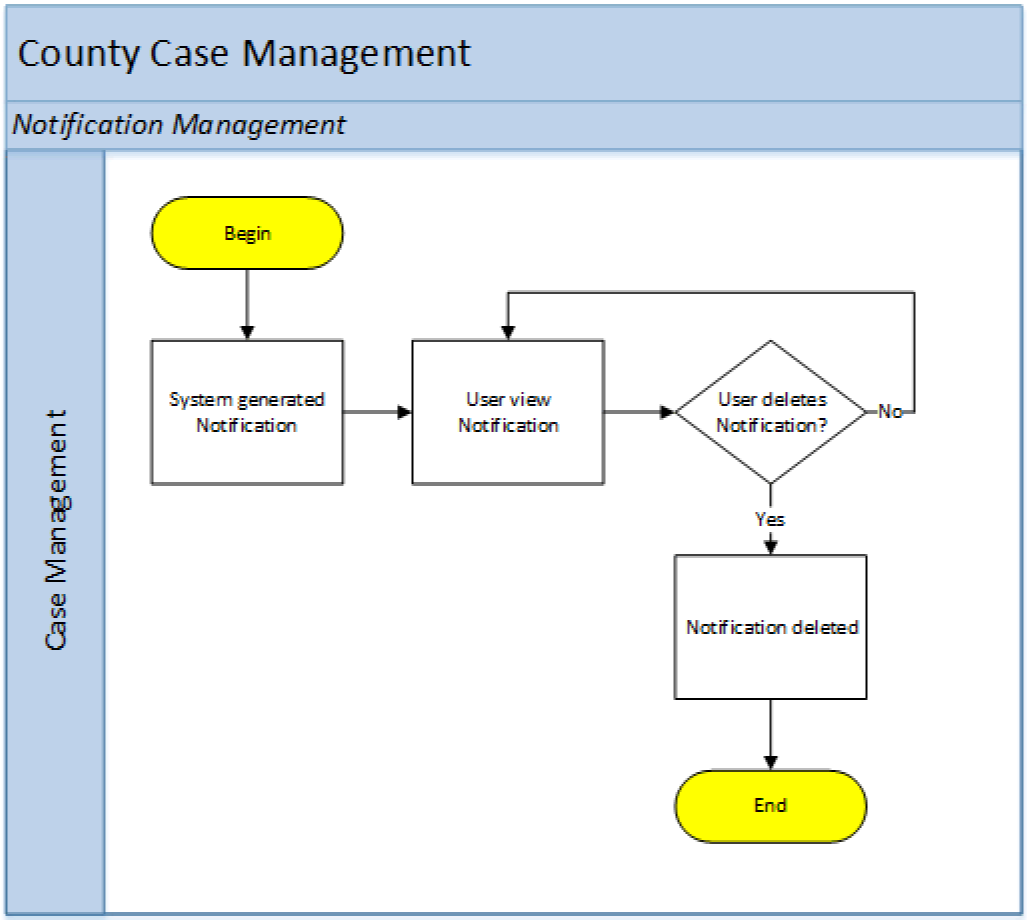


Figure – Notification Management

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Case Review for User Requiring Approval

CI	Document Name
CI-116205 - DSD BP Case Review for User Requiring Approval IMPLEMENTED	DSD_BP_Case_Review_for_User_Requiring_Approval.doc

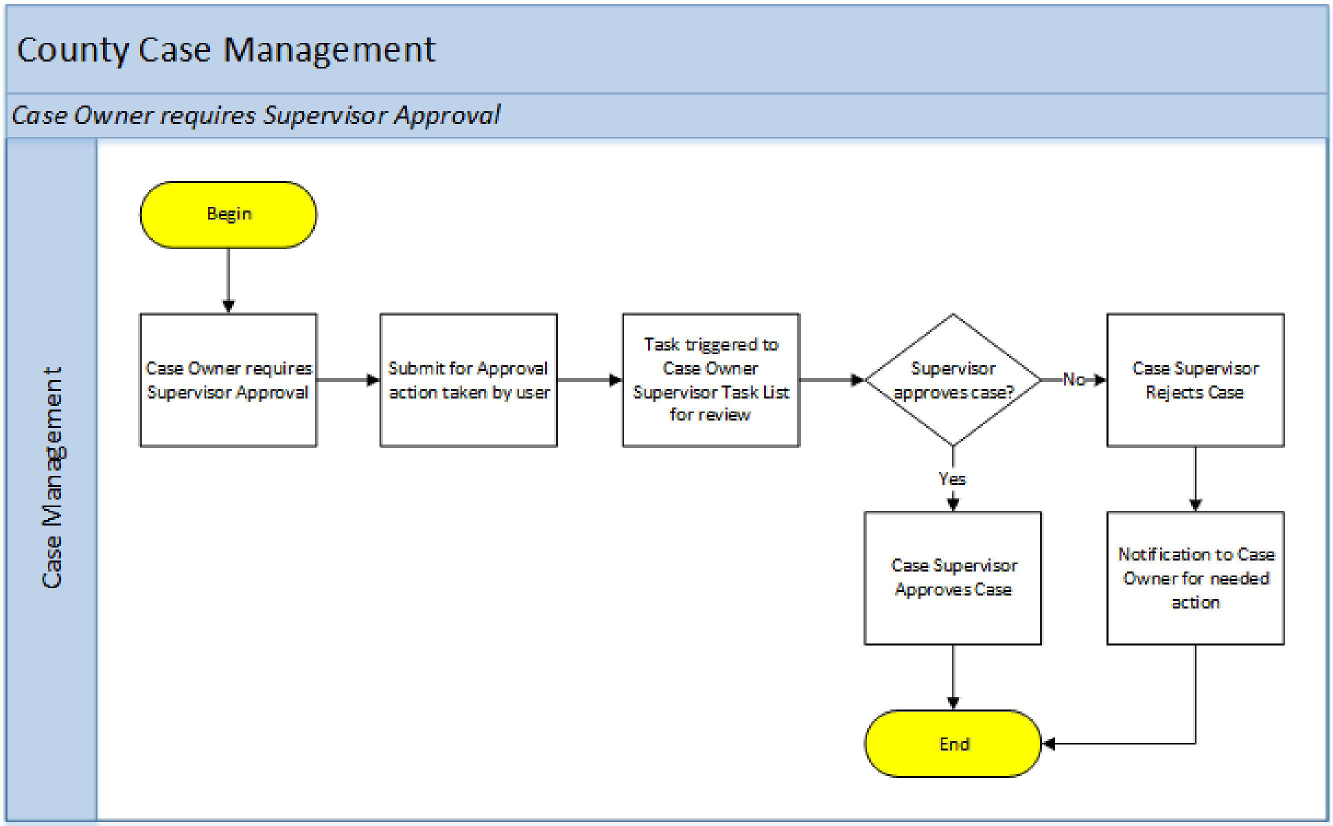


Figure – Case Review for User Requiring Approval

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Caseload Reassignment

CI	Document Name
CI-116207 - DSD BP Caseload Reassignment IMPLEMENTED	DSD_BP_Caseload_Reassignment.doc

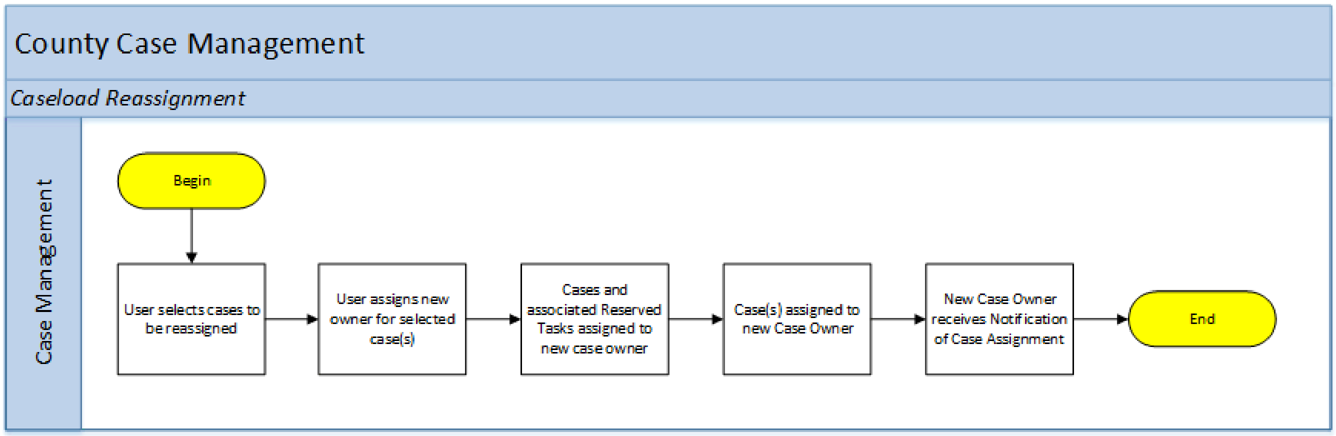


Figure – Caseload Reassignment

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/DHCS Treatment Authorization Request (TAR) Interface

CI	Document Name
CI-116211 - DSD BP DHCS Treatment Authorization Request TAR Interface IMPLEMENTED	DSD_BP_DHCS_Treatment_Authorization_Request_TAR_Interface.doc

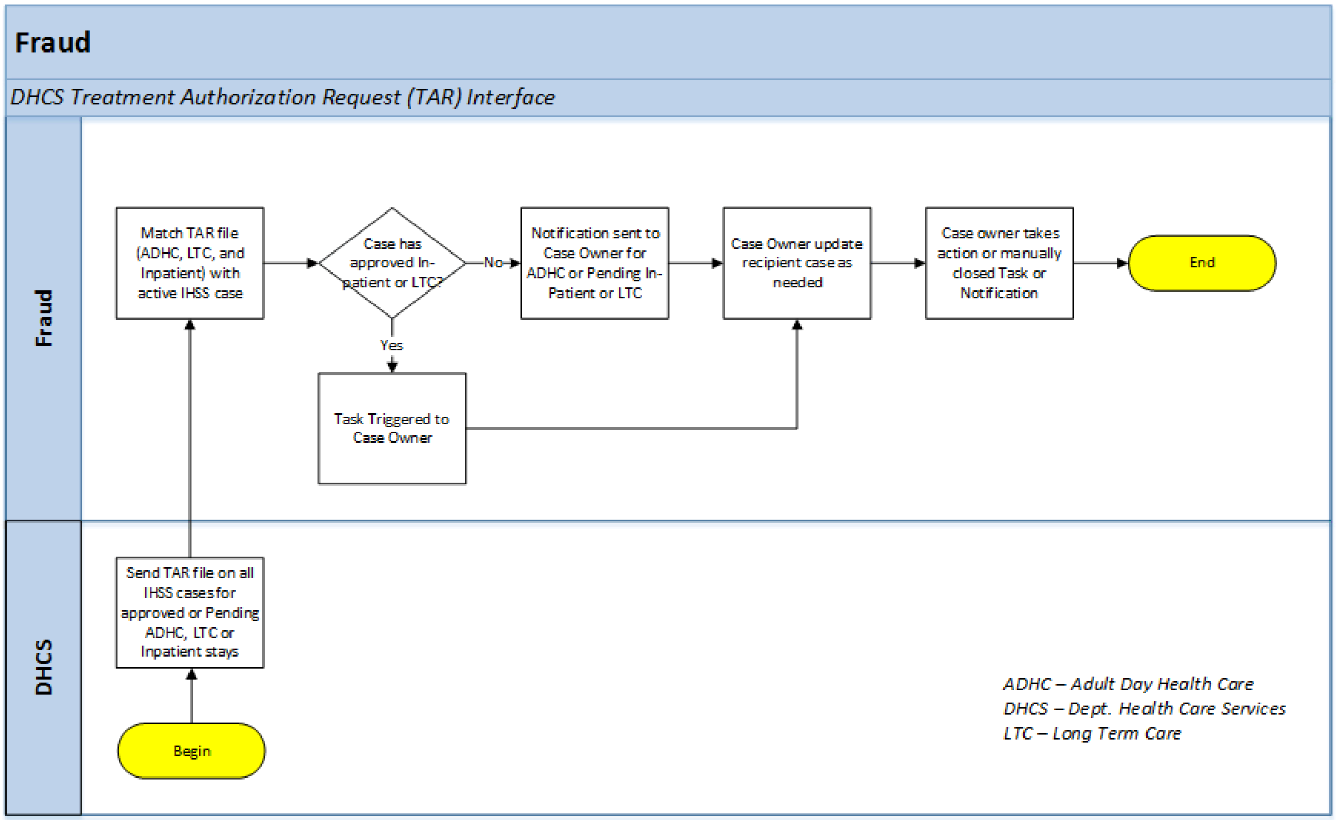


Figure – DHCS Treatment Authorization Request (TAR) Interface

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/DHCS Medi-Cal Service Match Interface

CI	Document Name
CI-116210 - DSD BP DHCS Medi Cal Service Match Interface IMPLEMENTED	DSD_BP_DHcS_Medi_Cal_Service_Match_Interface.doc

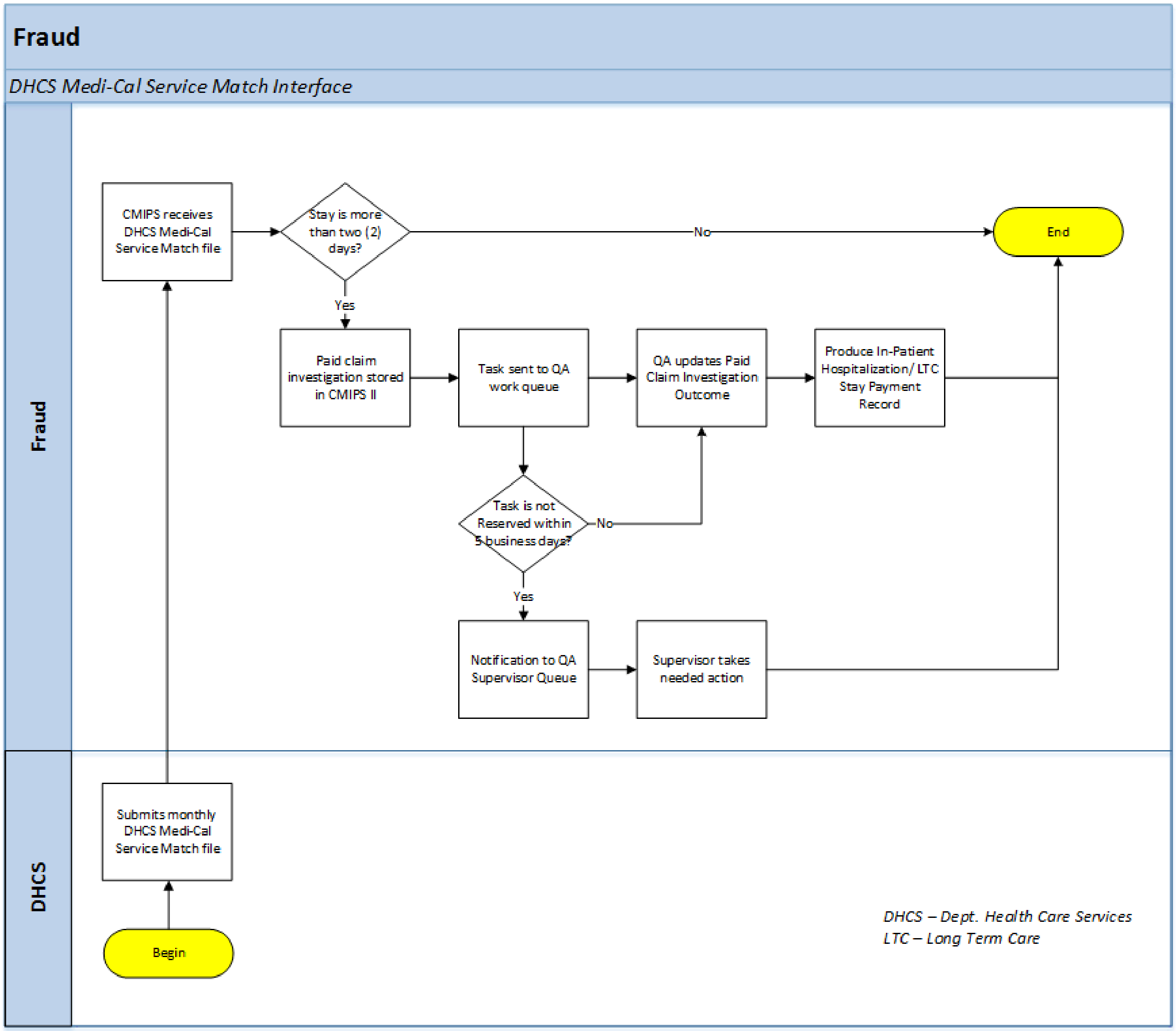


Figure – DHCS Medi-Cal Service Match Interface

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/QA Assessment Review

CI	Document Name
CI-116220 - DSD BP QA Assessment Review IMPLEMENTED	DSD_BP_QA_Assessment_Review.doc

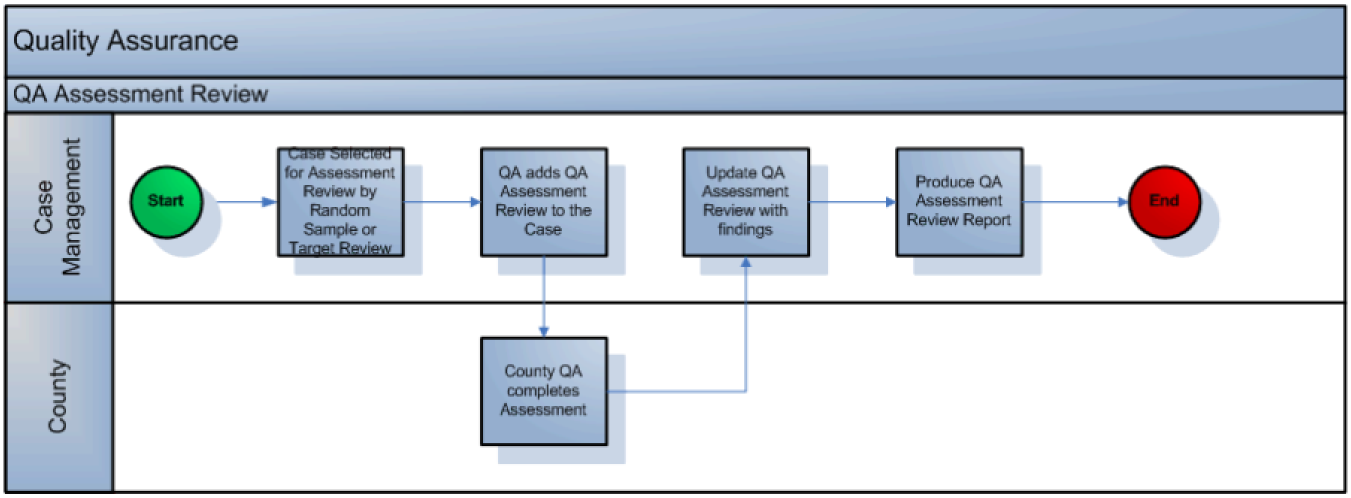


Figure – QA Assessment Review

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Case Investigation Referral Tracking

CI	Document Name
CI-116203 - DSD BP Case Investigation Referral Tracking IMPLEMENTED	DSD_BP_Case_Investigation_Referral_Tracking.doc

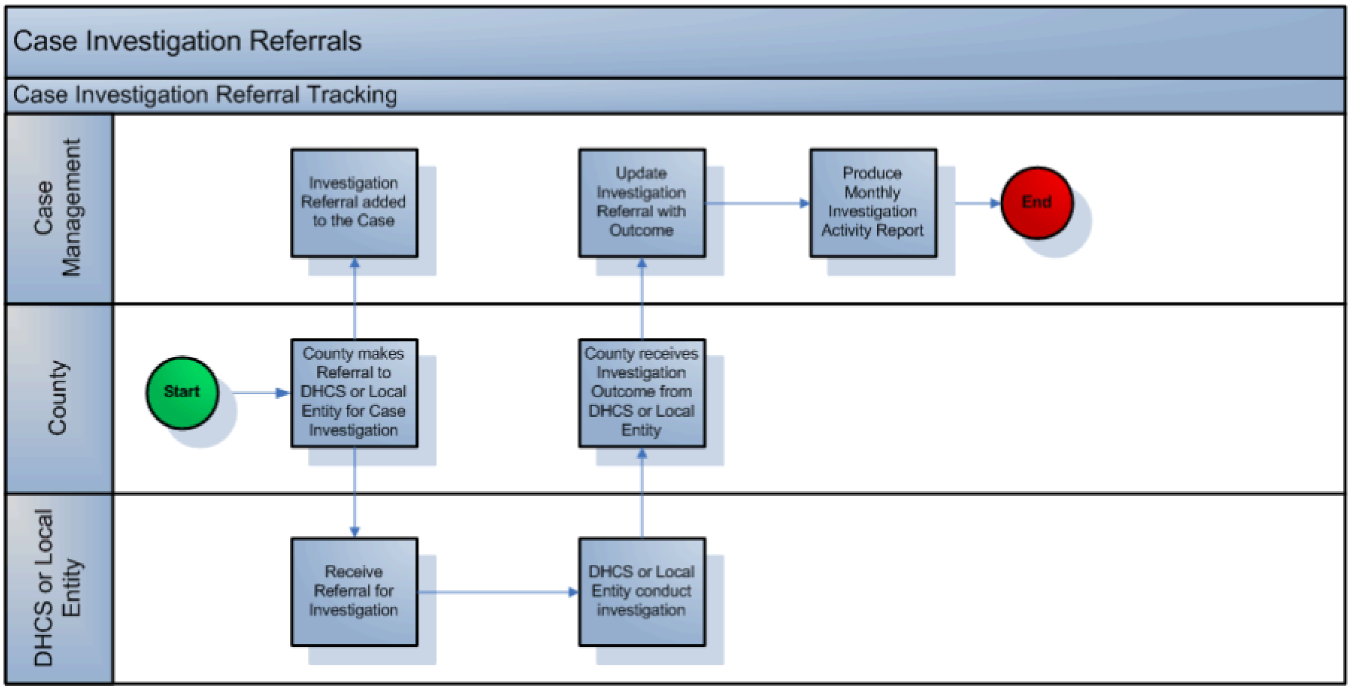


Figure – Case Investigation Referral Tracking

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/CDPH Death Match Receive Interface

CI	Document Name
CI-67517 - DSD BP CDPH Death Match Receive Interface IMPLEMENTED	DSD_BP_CDPH_Death_Match_Receive_Interface.doc

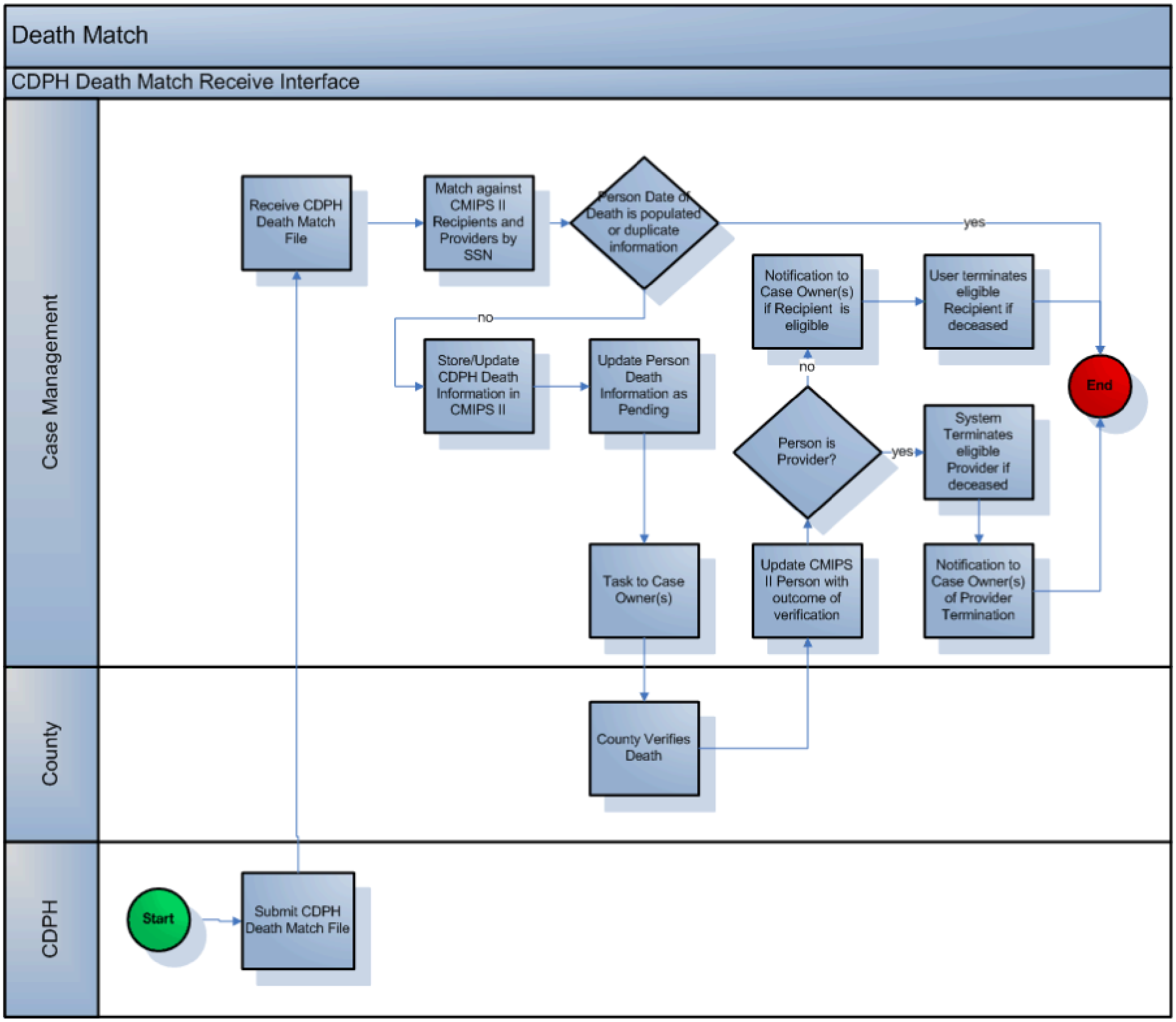


Figure - CDPH Death Match Receive Interface

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/SCO Death Match Receive Interface

CI	Document Name
CI-67507 - DSD BP SCO Death Match Receive Interface IMPLEMENTED	DSD_BP_SCO_Death_Match_Receive_Interface.doc

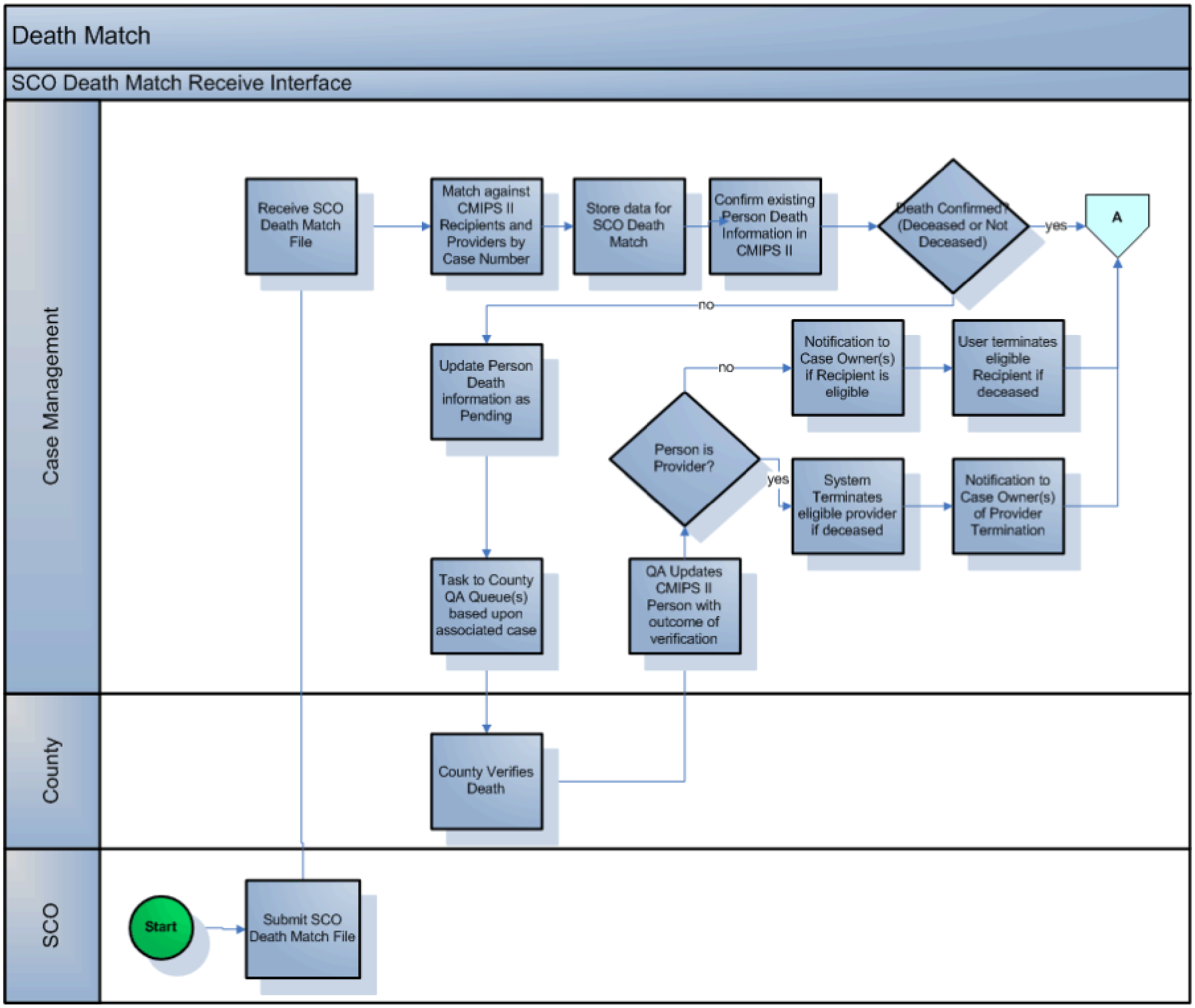


Figure - SCO Death Match Receive Interface

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/SCO Death Match Send Interface

CI	Document Name
CI-67515 - DSD BP SCO Death Match Send Interface IMPLEMENTED	DSD_BP_SCO_Death_Match_Send_Interface.doc

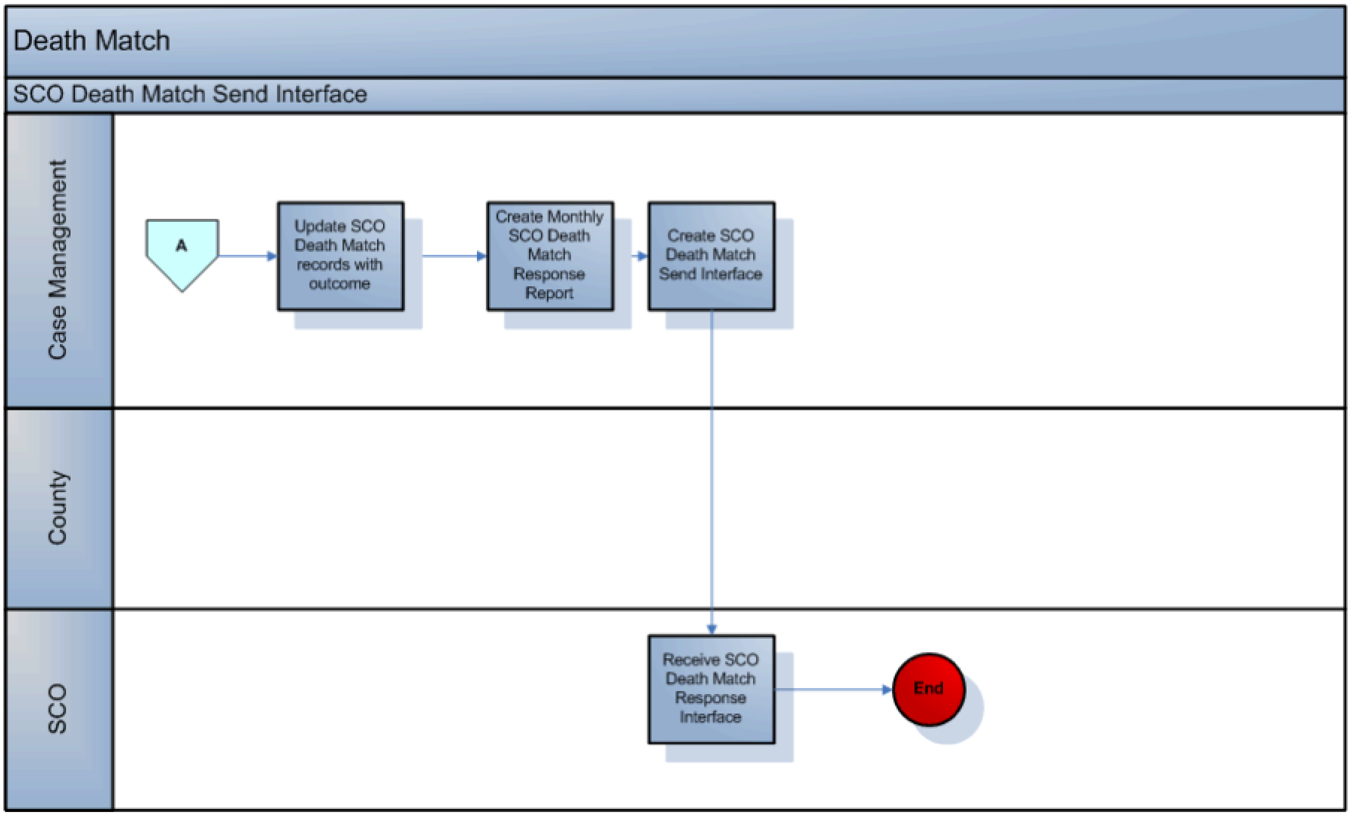
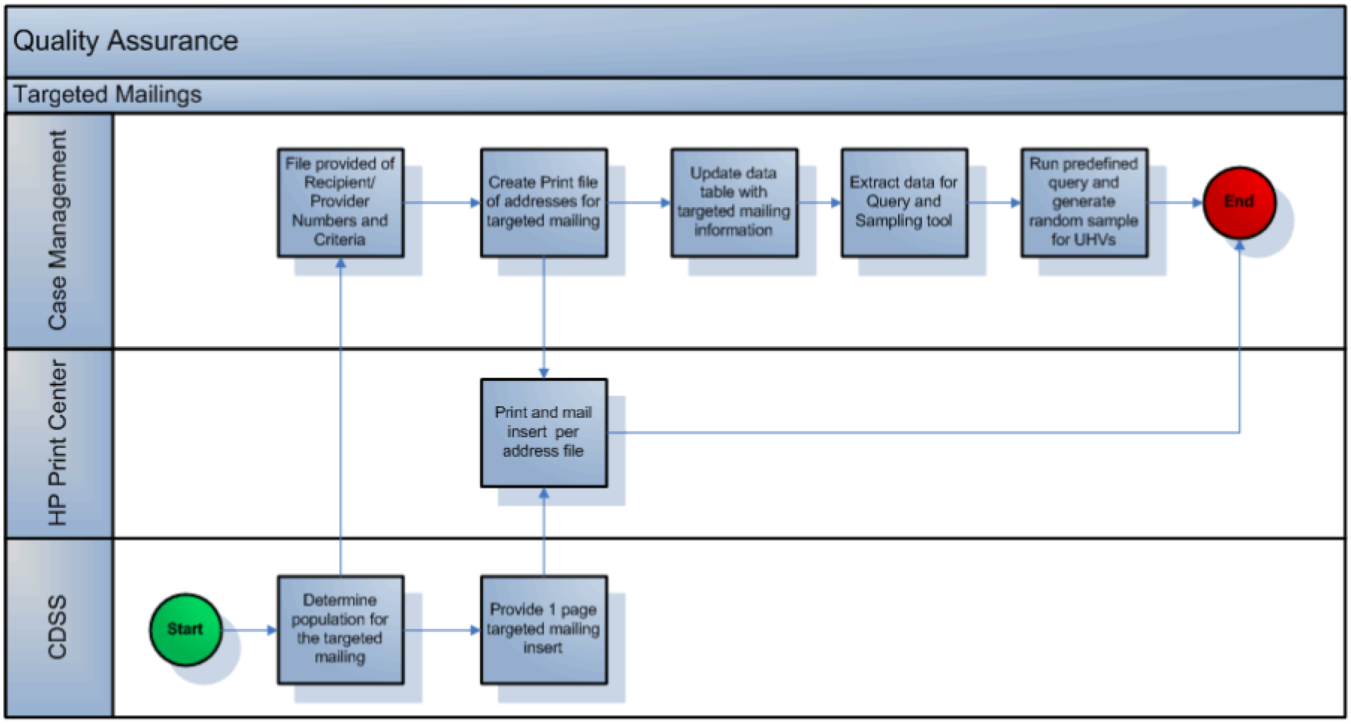


Figure - SCO Death Match Send Interface

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Targeted Mailings

CI	Document Name
CI-80465 - DSD BP Targeted Mailing IMPLEMENTED	DSD_BP_Targeted_Mailing.doc



*UHV – Unannounced Home Visits

Figure – Targeted Mailings

DSD 26/Recip CM & OS – Program Management, Fraud /Business Process Flows/Initiation/Triggers, Pre-Conditions and Post Conditions

The following is a summary view of business processes:

ID	Business Function	Initiation/Triggers	Pre-Conditions	Post Conditions
1	Task Management	Based upon triggers defined for each specific task as defined in the Tasks /Notifications section of the DSD.	Dependent upon each specific task.	Dependent upon each specific task.
2	User Assigned Task Management	Based upon triggers defined for each specific task as defined in the Tasks /Notifications section of the DSD	Dependent upon each specific task.	Dependent upon each specific task. Tasks will be automatically reserved to the assigned user.
3	Notification Management	Based upon triggers defined for each specific Notification as defined in the Tasks /Notifications section of the DSD	Dependent upon each specific notification.	None
4	Case Review	Based upon specific user role or a request by a user.	Applicable information is entered for the case.	Case approved. Case is not approved and corrections are sent to the Case Worker via a notification.
5	Bulk Caseload Reassignme nt	User requests caseload reassignment.	None	Cases are assigned to the new case owner through a background process. Notification is sent to the new case owner of reassigned cases. Any task for the case, which is reserved to the original case owner, will be reassigned and reserved to the new case owner.
6	DHCS Treatment Authorization Request (TAR) Match	Receipt of the TAR file from DHCS	None	Task is sent to Case Worker for any case with approved In-patient or Long Term Care (LTC) Treatment authorization Request (TAR). Notification sent to the Case Worker for any case with approved Adult Day Health Care (ADHC) TAR. Notification sent to Case Worker for any case with a pending In-patient, LTC or ADHC TAR.
7	DHCS Medi-Cal Service Match	Receipt of the DHCS Medi-Cal Service Match file.	Paid Claim reflects stay longer than two days	Produce the In-Patient Hospitalization/Long Term Care Stay Payment Review Report. Task to QA Queue for Paid Claim Investigation If task is not reserved from the queue within five business days, send a notification to the QA Supervisor
8	QA Case Assessment Review	County determines Case to be Reviewed	Case exists in CMIPS	Create and Update the QA Case Assessment Produce the QA Assessment Review Report
9	Case Investigation Referral Tracking	County learns of investigation referral	Case exists in CMIPS	Create and Update Case Investigation Referral Produce the Monthly Investigation Referral Activity Report
10	CDPH Death Match Receipt of Information	Receipt of the CDPH Death Match information and match with CMIPS Recipients and Providers	Recipient or Provider SSN matches with ALTERNATEID of type SSN in CONCERNROLEALTERNATEID table and Death outcome code is blank or value is "PENDING". If death outcome code is "PENDING" then reported date of death from CDPH interface should be after reported date of death in CMIPS.	Create CDPH Death Match Information record Task to Case Owner(s) to verify death information received If task is not completed in 2 business days, escalate task to Case Supervisor
11	SCO Death Match	Receipt of the SCO Death Match information and match with CMIPS Recipients and Providers	Recipient or Provider matches based upon Decedent SSN.	Create SCO Death Match Information record Task to QA Queue to verify death information received If death is already confirmed, update SCO Death Match Information Produce SCO Death Match Response Report Produce SCO Death Match Response Interface
12	County verifies death information	Person Death information is confirmed online by end user.	Person is eligible as a Recipient or Provider SCO Death Match information is associated with this person	If Person death information updated by someone other than the case owner, notify case owner(s) of updated death information for any eligible Recipient or Provider. If Person is a Provider and the death is confirmed, terminate any active Recipient/Provider relationships. Update SCO Death Match Information

13	Targeted Mailings	File of Recipients and/or Providers to receive Targeted Mailing is received from CDSS by CGI	CDSS has identified existing Recipients and/or Providers in CMIPS	Targeted Mailing "slip page" is produced and mailed with associated insert provided. Record of the targeted mailing is added to the Recipient case.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Task Management

CI	Document Name
CI-67493 - DSD SF Task Management IMPLEMENTED	DSD_SF_Task_Management.doc

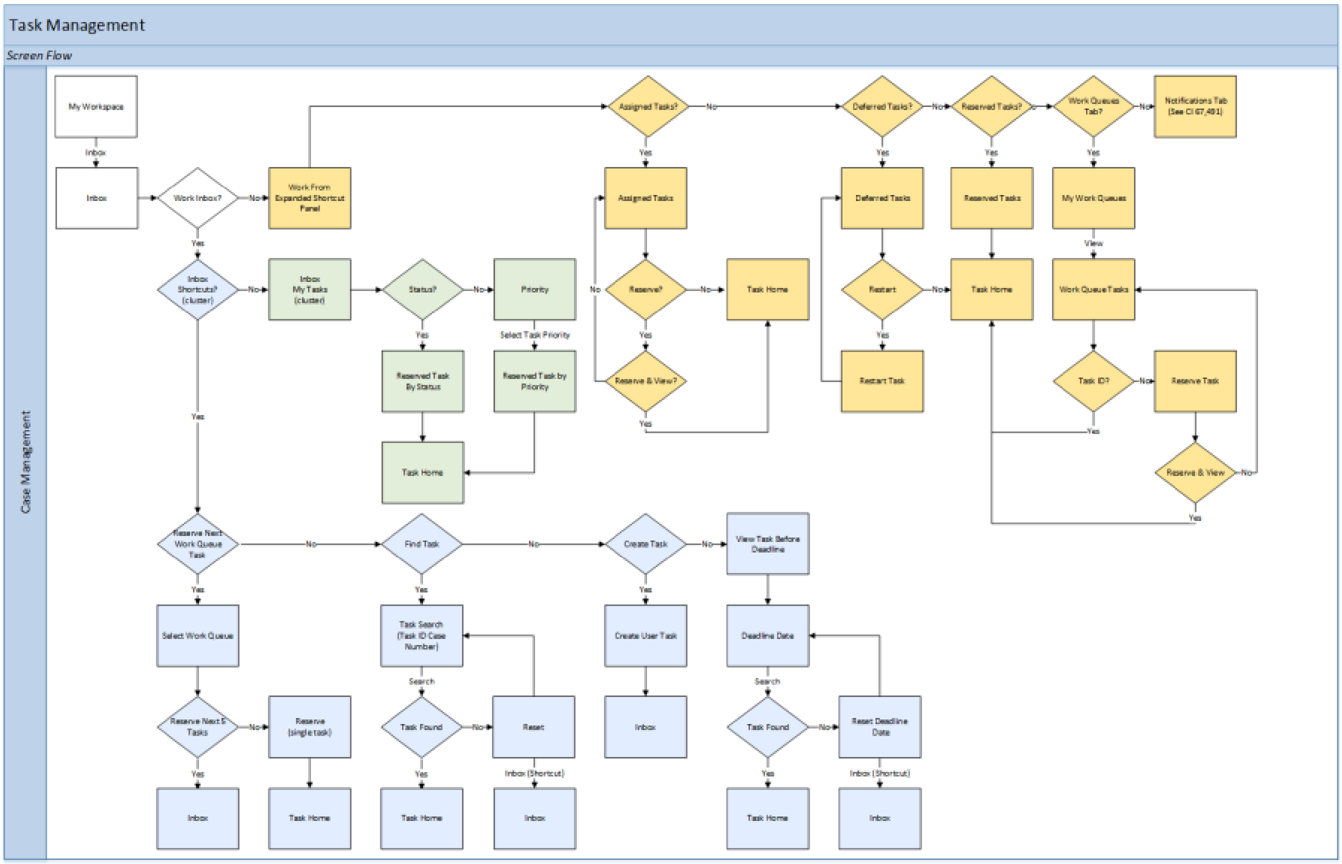


Figure – Task Management

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Task Home

CI	Document Name
CI-67496 - DSD SF Task Home IMPLEMENTED	DSD_SF_Task_Home.doc

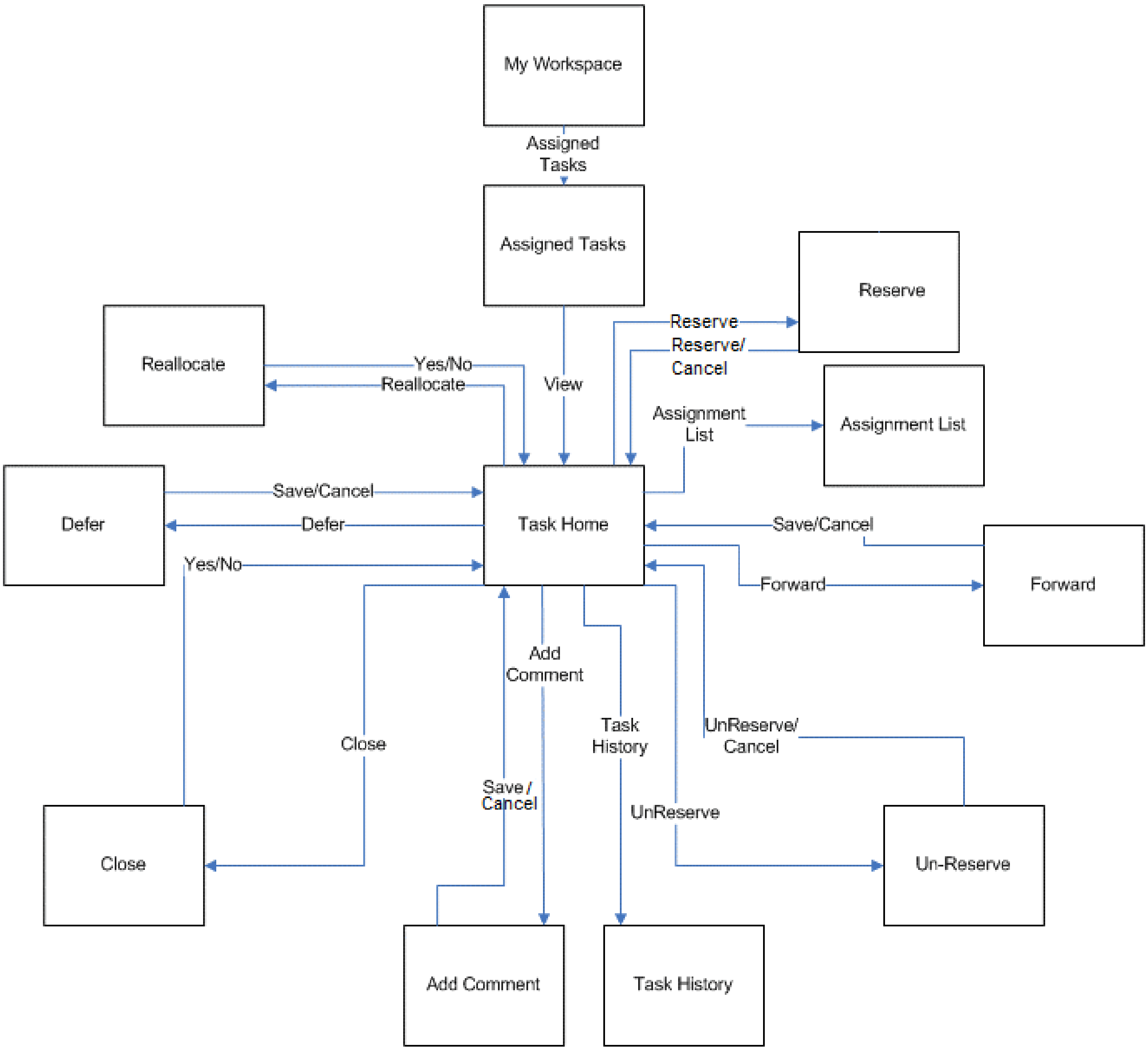


Figure – Task Home

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Case Task List

CI	Document Name
CI-67484 - DSD SF Case Task List IMPLEMENTED	DSD_SF_Case_Task_List.doc

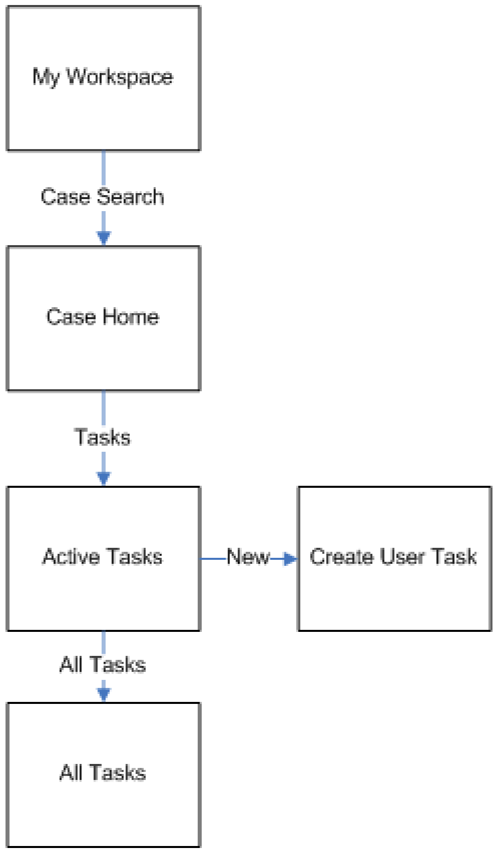


Figure – Case Task List

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Notification Management

CI	Document Name
CI-67491 - DSD SF Notification Management IMPLEMENTED	DSD_SF_Notification_Management.doc

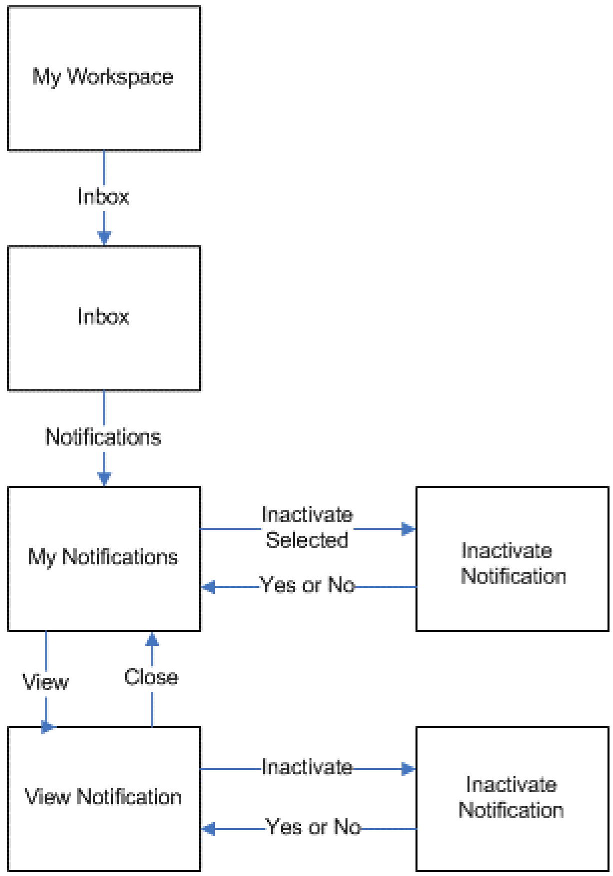


Figure – Notification Management

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Bulk Case Reassignment

CI	Document Name
CI-67488 - DSD SF Bulk Case Reassignment IMPLEMENTED	DSD_SF_Bulk_Case_Reassignment.doc

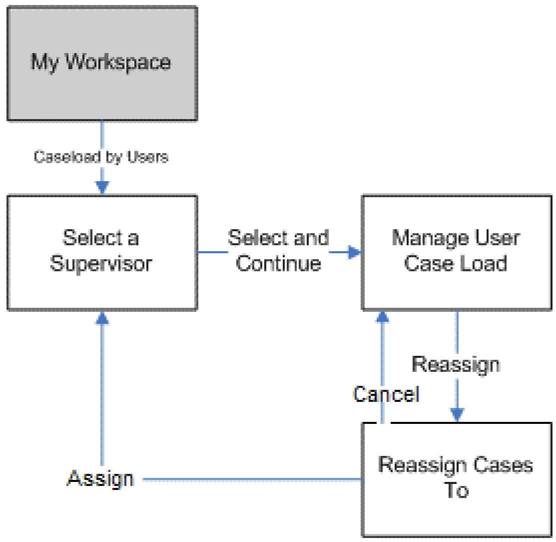


Figure – Bulk Case Reassignment

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Work Queue Administration

CI	Document Name
CI-67483 - DSD SF Work Queue Administration IMPLEMENTED	DSD_SF_Work_Queue_Administration.doc

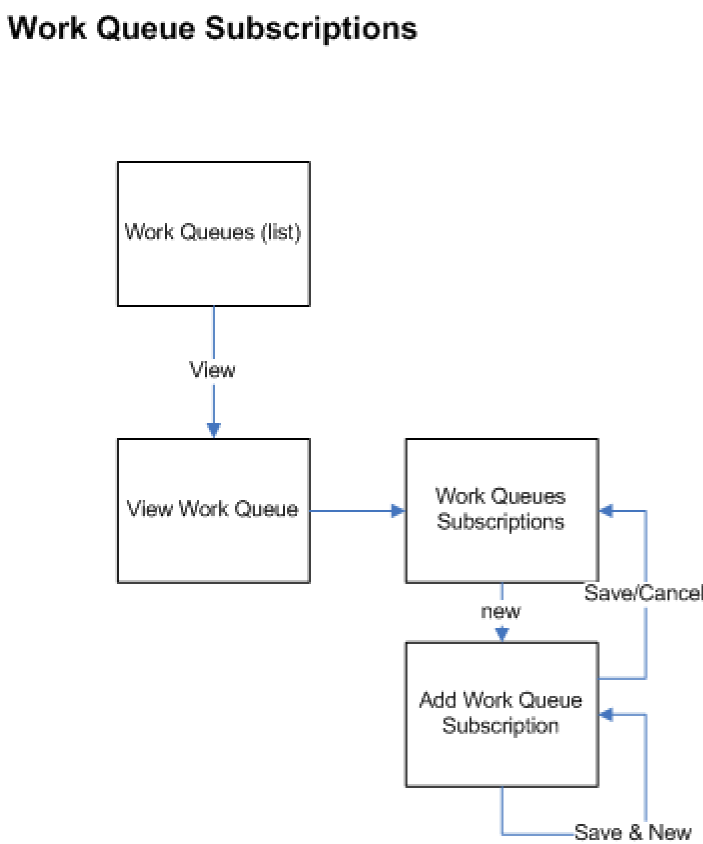


Figure – Work Queue Subscriptions

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/System Administration Screen Flow

CI	Document Name
CI-67486 - DSD SF System Administration Screen Flow IMPLEMENTED	DSD_SF_System_Administration_Screen_Flow.doc

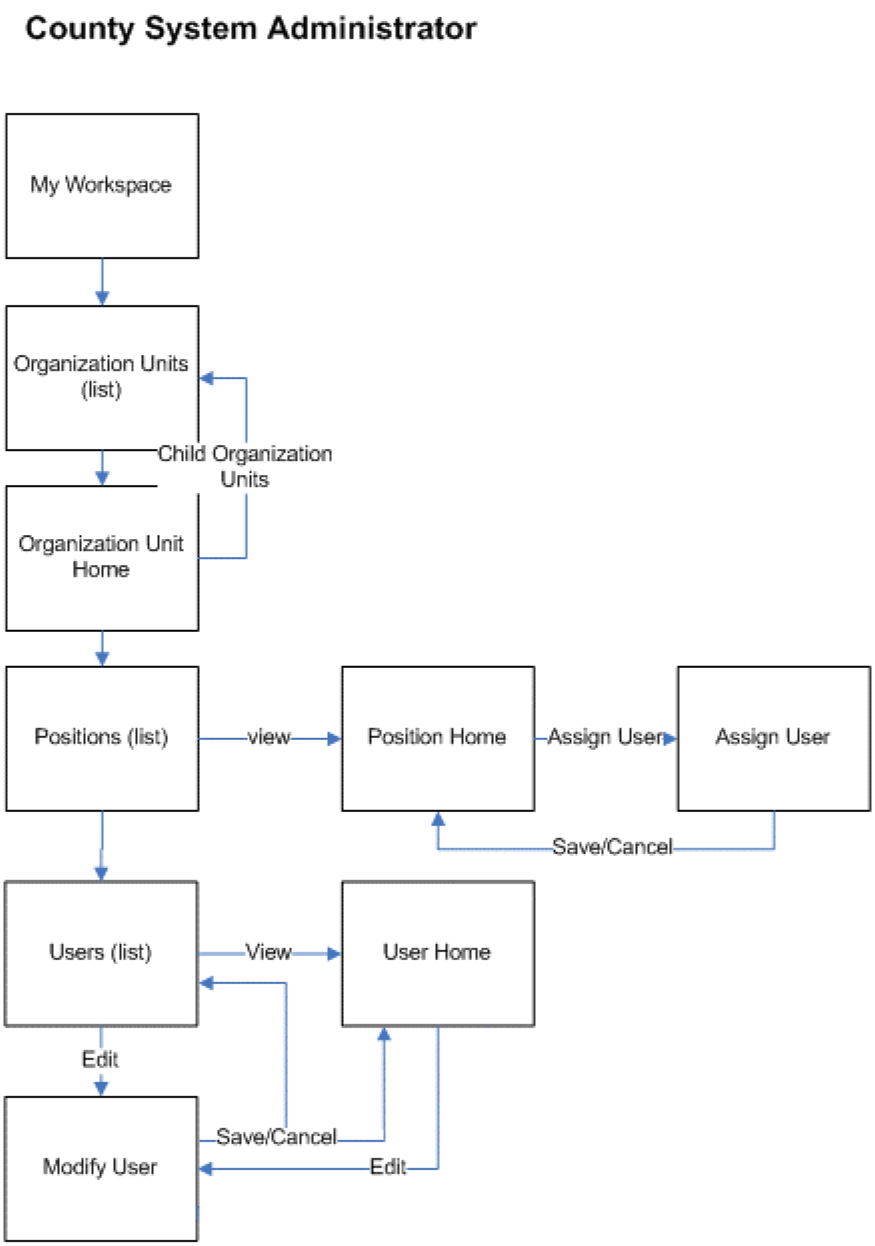


Figure – System Administrator Screen Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/User Management

CI	Document Name
CI-67492 - DSD SF User Management IMPLEMENTED	DSD_SF_User_Management.doc

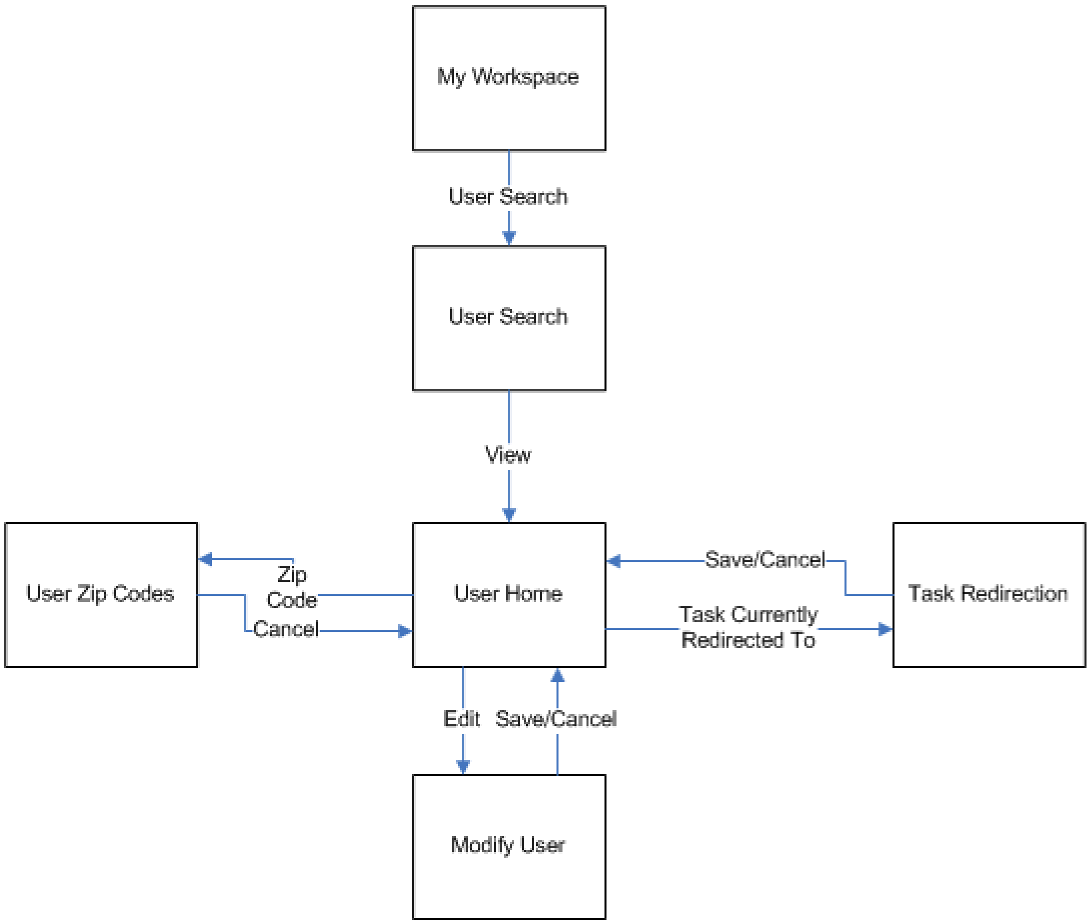


Figure – User Management

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Contract Rate Management

CI	Document Name
CI-67497 - DSD SF Contract Rate Management IMPLEMENTED	DSD_SF_Contract_Rate_Management.doc

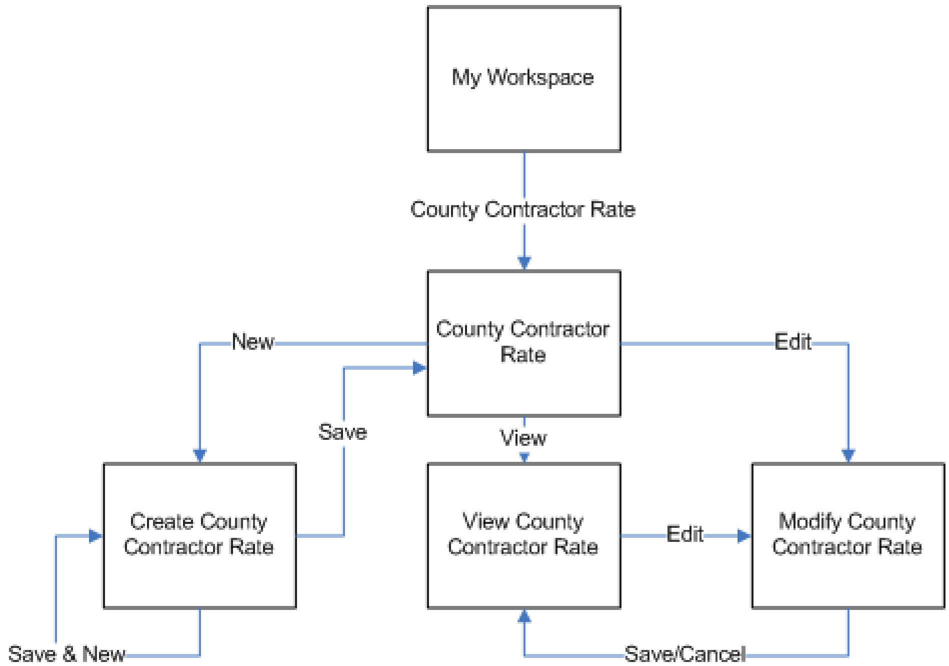


Figure – Contract Rate Management

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Public Authority Wage Rate

CI	Document Name
CI-67485 - DSD SF Public Authority Wage Rate IMPLEMENTED	DSD_SF_Public_Authority_Wage_Rate.doc

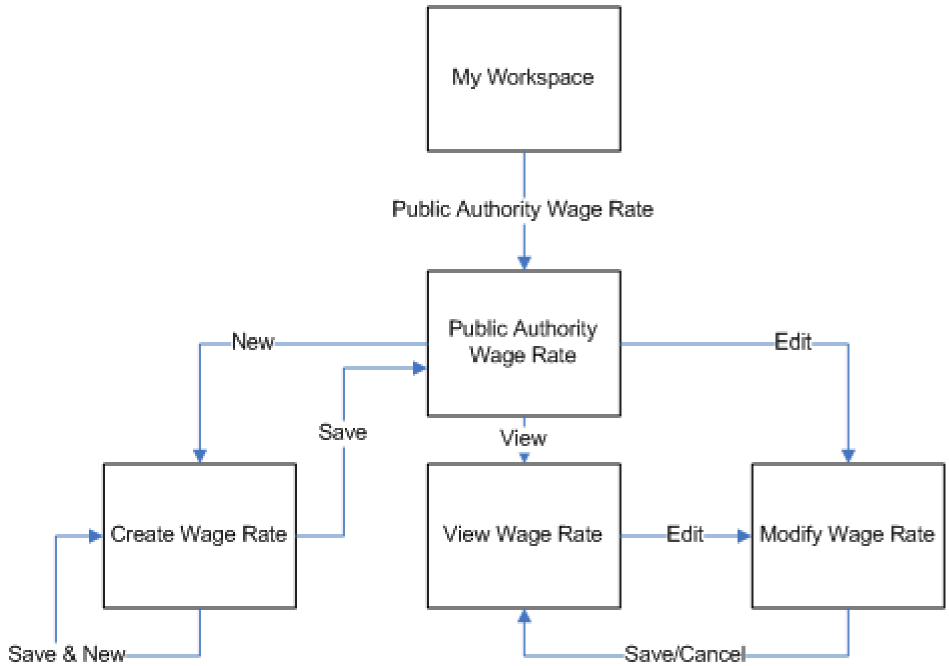


Figure – Public Authority Wage Rate

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/QA Case Review Screen Flow

CI	Document Name
CI-67494 - DSD SF QA Case Review Screen Flow IMPLEMENTED	DSD_SF_QA_Case_Review_Screen_Flow.doc

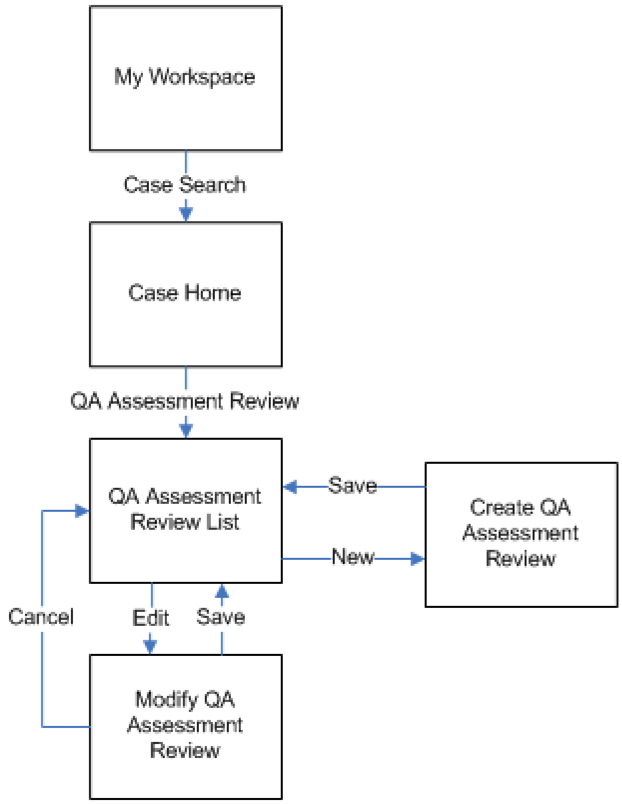


Figure – QA Case Review Screen Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Case Investigation Referral Screen Flow

CI	Document Name
CI-67487 - DSD SF Case Investigation Referral Screen Flow IMPLEMENTED	DSD_SF_Case_Investigation_Referral_Screen_Flow.doc

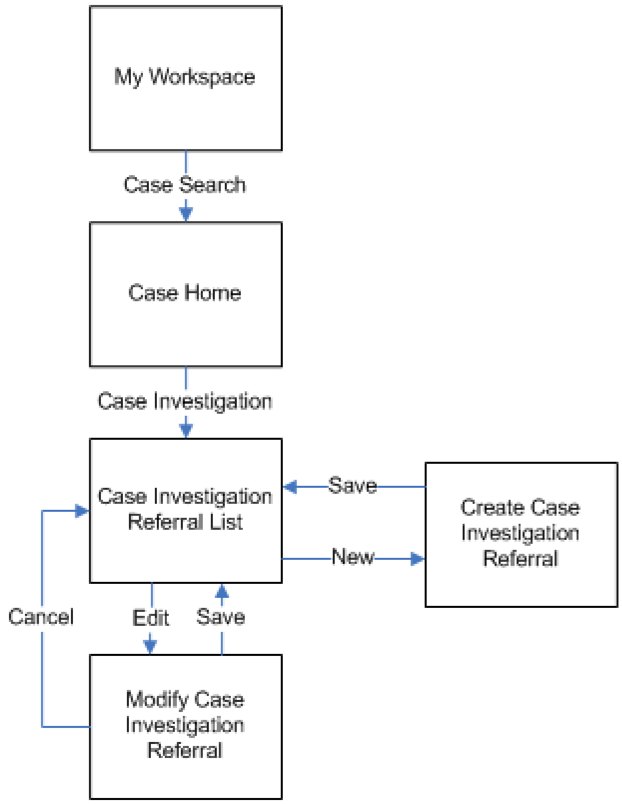


Figure – Case Investigation Referral Screen Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/DHCS Paid Claims Screen Flow

CI	Document Name
CI-67489 - DSD SF Paid Claims Screen Flow IMPLEMENTED	DSD_SF_Paid_Claims_Screen_Flow.doc

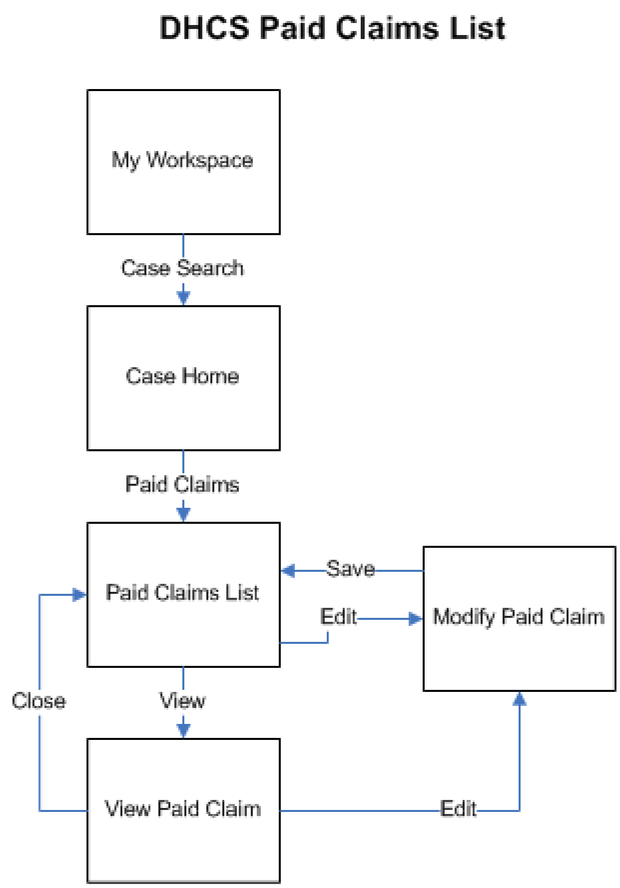


Figure – DHCS Paid Claims Screen Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Public Authority Screen Access Flow

CI	Document Name
CI-67490 - DSD SF Public Authority Screen Access Flow IMPLEMENTED	DSD_SF_Public_Authority_Screen_Access_Flow.doc

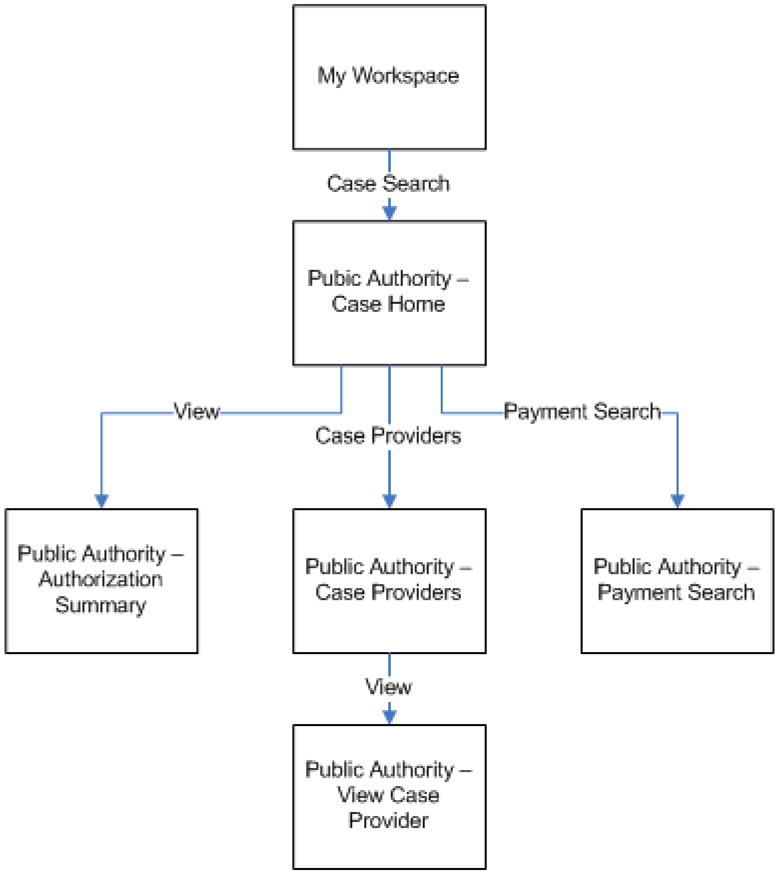


Figure – Public Authority Screen Access Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/CDPH Death Match Screen Flow

CI	Document Name
CI-67482 - DSD SF CDPH Death Match Screen Flow IMPLEMENTED	DSD_SF_CDPH_Death_Match_Screen_Flow.doc

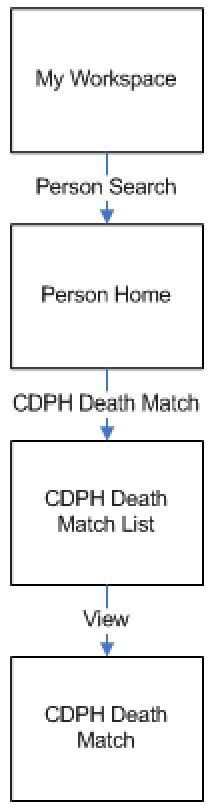


Figure – CDPH Death Match Screen Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Flow/Supervisor Workspace

CI	Document Name
CI-813203 - DSD SF Supervisor Workspace IMPLEMENTED	DSD_SF_Supervisor_Workspace.docx

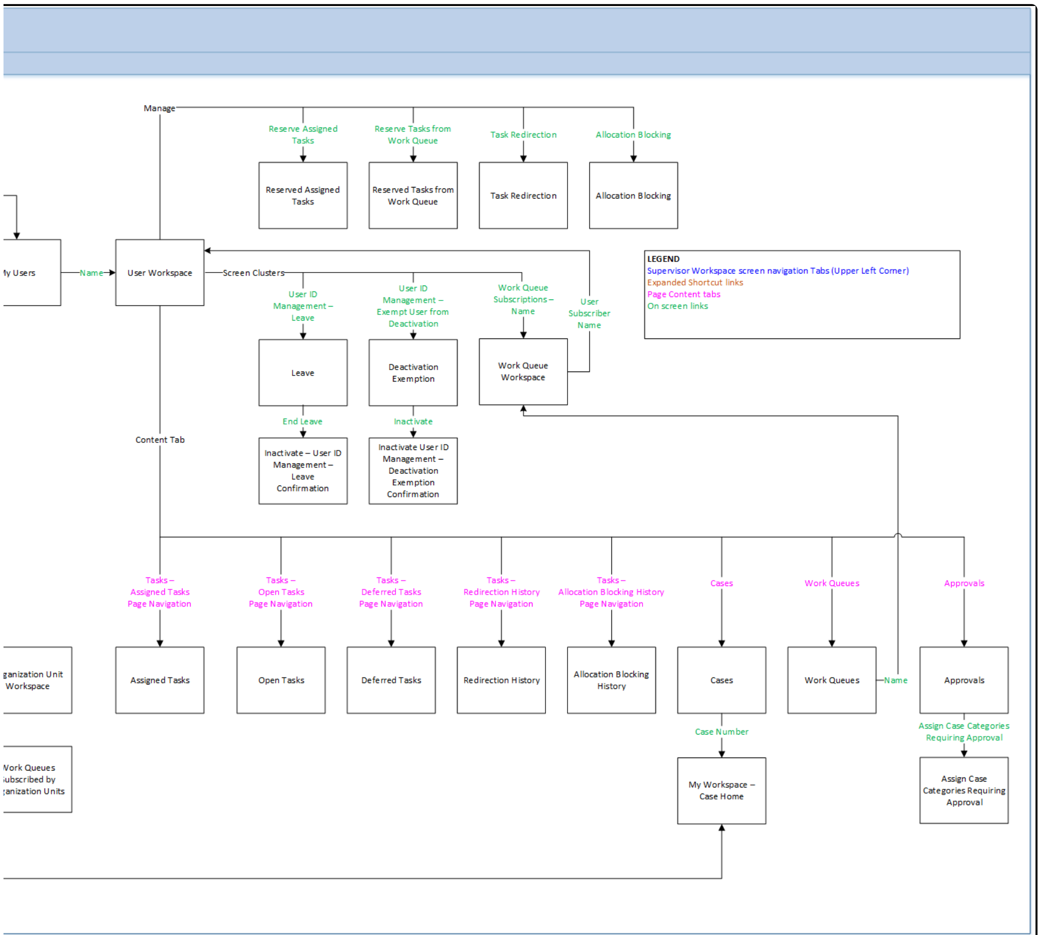


Figure – Supervisor Workspace Screen Flow

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs

This section describes all application screens associated with Program Management and Fraud.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/My Workspace

See DSD Section 20 for a detailed description of My Workspace and all associated actions/functions and data elements.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/User Inbox

CI	Document Name
CI-67440 - DSD SC User Inbox IMPLEMENTED	DSD_SC_User_Inbox.doc

This screen accesses the user's inbox. It displays when the Inbox tab is selected at the top of the Cúram application.

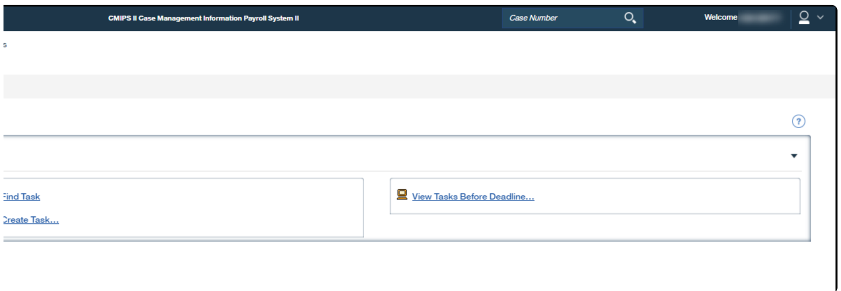


Figure – User Inbox

Actions/Functions

The following actions are associated with the User Inbox screen:

Actions	Function
Reserve Next Work Queue Task	Opens the Reserve Next Task from Work Queue pop up.
Find Task	Opens the Task Search screen.
Create Task	Opens the Create User Task pop up.
View Tasks Before Deadline	Opens the Reserved Tasks Due Before Date pop up.

Data Elements

There are no data elements for this screen.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reserve Next Task from Work Queue

CI	Document Name
CI-67397 - DSD SC Reserve Next Task IMPLEMENTED	DSD_SC_Reserve_Next_Task.doc

When the Reserve Next Work Queue Task link is selected from the Shortcuts cluster the user's Inbox, the Reserve Next Task from Work Queue pop-up displays allowing a user to designate the Work Queue from which to Reserve tasks.

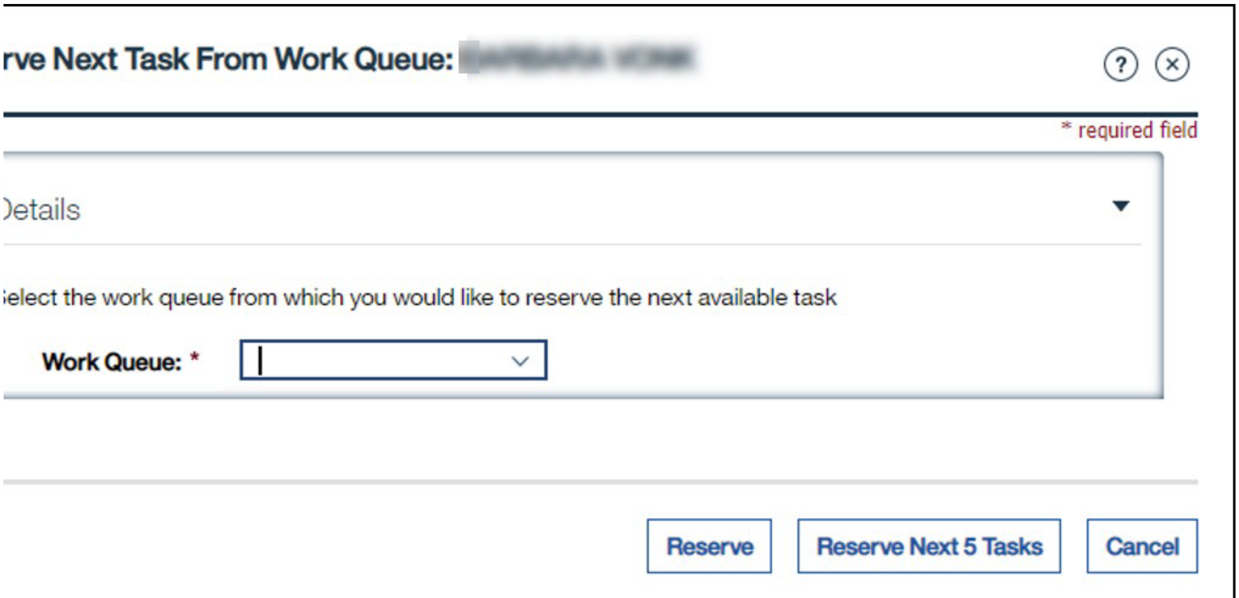


Figure - Reserve Next Task from Work Queue

Actions/Functions

The following actions are associated with the Reserve Next Work Queue Task pop-up:

Actions	Function
Reserve	This function reserves the next task from the selected work queue. The task to reserve is determined using the task priority and the date on which the task was assigned to the work queue. This function reserves the highest priority task which has been assigned to the work queue for the longest period. An environment variable is used to control whether task priority is used in determining which task to reserve. If this variable is set to exclude task priority, then the task assigned to the work queue for the longest period is reserved regardless of priority. If a task is reserved, then the Task Home screen for that task displays.
Reserve Next 5 Tasks	Reserves the next five tasks from the selected Work Queue.
Cancel	Cancels the action and displays the user's Inbox

Data Elements

The following data elements are specific to the Reserve Next Work Queue Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Work Queue	Name of the work queue. Only displays the Work Queues to which this user is subscribed.	Drop-down list	Yes	Payroll	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Task Search

CI	Document Name
CI-67459 - DSD SC Task Search IMPLEMENTED	DSD_SC_Task_Search.doc

When the Find Task link is selected from the Shortcuts cluster of the Inbox the Task Search screen displays allowing the user to search for a Task by Task ID or Case Number. Task Search displays all tasks regardless of status. The resulting list is limited to 50 tasks with the most recent task at the top of the list.

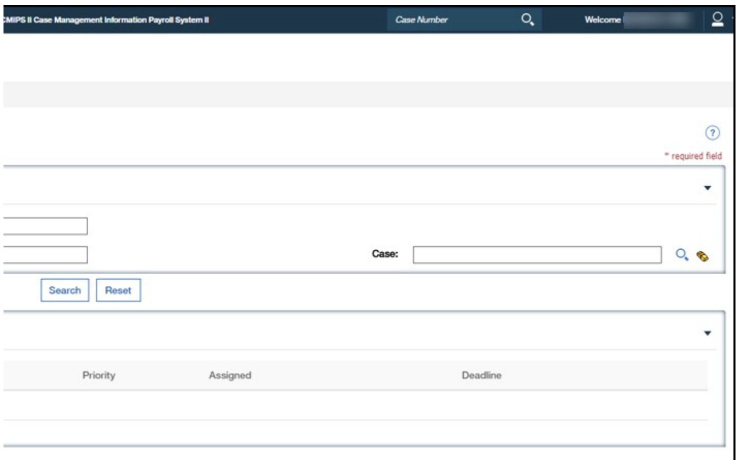


Figure - Task Search

Actions/Functions

The following actions are associated with the Task Search screen:

Actions	Function
Case	Displays the Case Search screen.
Search	Executes the Task Search based upon the indicated Search Criteria.
Reset	Clears all fields on the screen.
View	Displays the Task Home for the Task
<Task ID>	Displays the Task Home for the Task

Data Elements

The following data elements are specific to the Task Search screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria					
Task ID	The unique identifier of a task.	Number	No	No	Yes
Case Number	The case associated with a task.	String	No	No	Yes
Search Results					
Subject	A short summary of the purpose or content of the task.	String	No	No	No

Priority	The priority of the task, e.g. High, Medium or Low.	String	No	No	No
Assigned	The date and time the task was assigned to the user.	Date Timestamp	No	No	No
Deadline	The date and time the task is scheduled for completion.	Date Timestamp	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Create User Task

CI	Document Name
CI-67405 - DSD SC Create User Task IMPLEMENTED	DSD_SC_Create_User_Task.doc

When the Create Task link is selected from the Shortcuts cluster of the user's Inbox the Create User Task pop-up displays allowing the user to create a new task (manual task).

This pop-up may also be accessed from the Case by selecting the Tasks page navigation from the Case Home content tab and then selecting the New link.

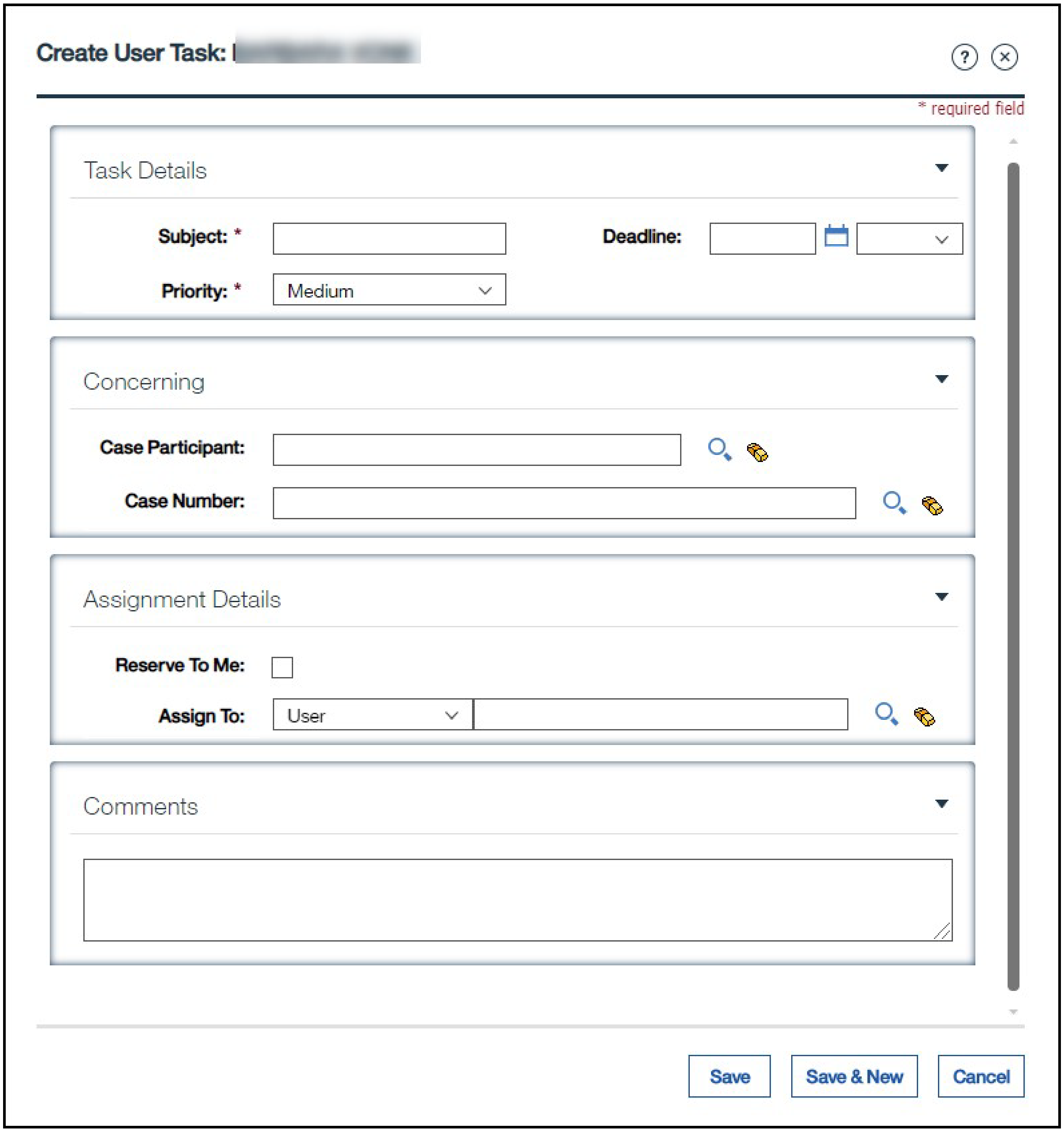


Figure – Create User Task

Actions/Functions

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

Actions	Function
Concerning	
Case Participant	Allows the User to search for a specific Provider (Case Participant) to which the Task will be associated.
Case Number	Allows the User to search for a specific Case to which the Task will be associated. When created from the Case prospective, this field will be populated with the Case Number.
Assignment Details	
Assign To	Indicates the target for assignment e.g. User and Work Queue. If User is indicated, the search will display the User Search screen. If Work Queue is indicated, the search will display the Work Queue list screen.
Screen Action	
Save	Saves the data and display the screen of origin.
Save & New	Saves the data and displays another Create User Task screen
Cancel	The cancel action dismisses the screen.

Data Elements

The following data elements are specific to the Create User Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Task Details					
Subject	A short summary of the purpose or content of the task.	String	Yes	No	Yes
Deadline	The date and time the task is scheduled for completion.	Date Timestamp MM/DD/YYYY HH:MM	No	No	Yes
Priority	The priority of the task, e.g. High, Medium, Low.	Drop-down List	Yes	Medium	Yes
Assignment Details					
Reserve To Me	Indicates that the task will be reserved to the user creating the task.	Checkbox	No	Unselected	Yes
Comments					
Comments	User comments about the task. Comments are 200 characters.	String	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reserved Tasks Due on Date or Before

CI	Document Name
CI-116585 - DSD SC Reserved Tasks Due on Date or Before IMPLEMENTED	DSD_SC_Reserved_Tasks_Due_on_Date_or_Before.doc

When the View Tasks Before Deadline link is selected from the Shortcuts cluster of the Inbox screen the Reserved Tasks Due on Date or Before pop-up displays allowing the user to search for Tasks which are due on or before a specific Deadline Date.

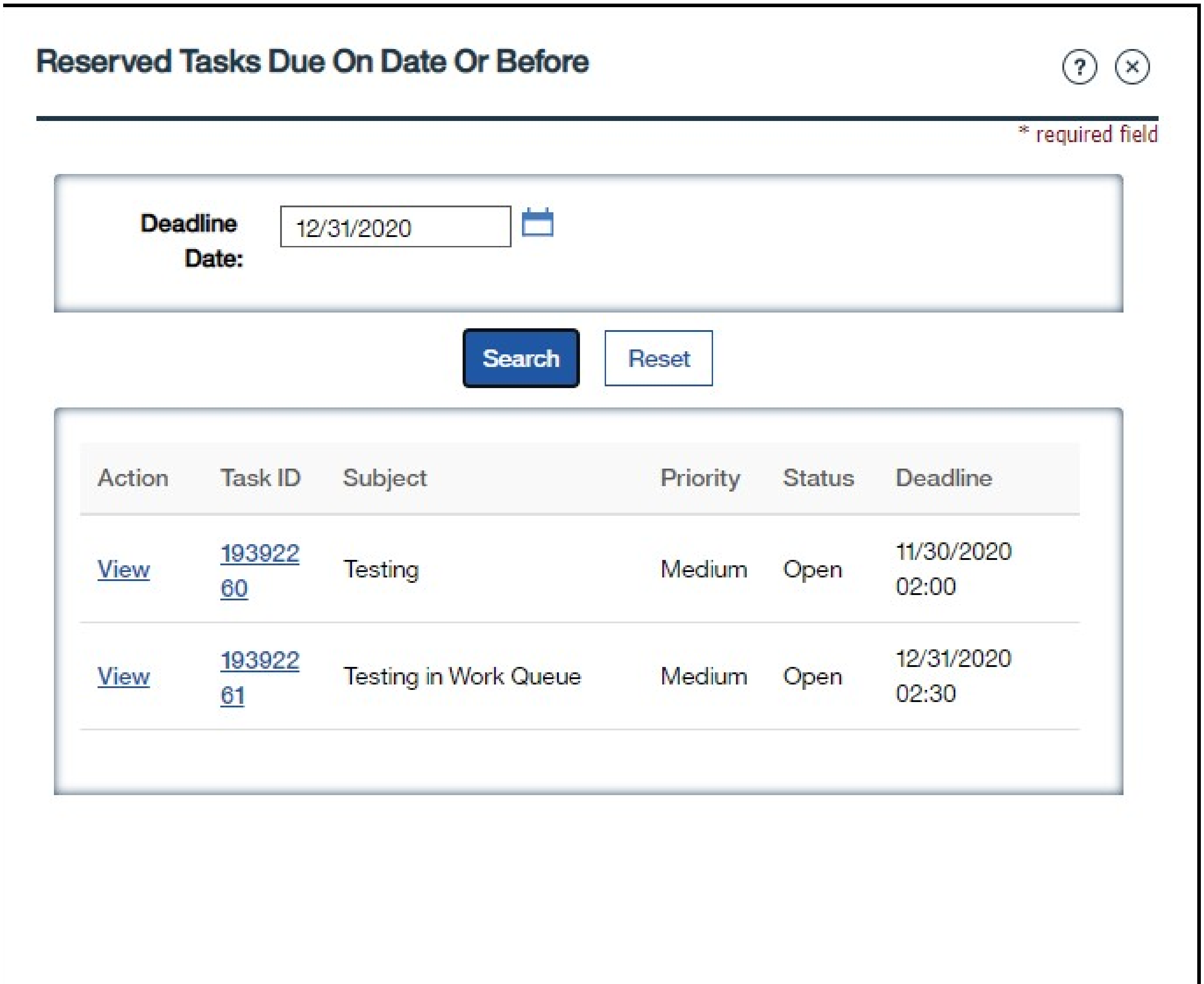


Figure - Reserved Tasks Due on Date or Before

Actions/Functions

The following actions are associated with the Reserved Tasks Due on Date or Before pop-up:

Actions	Function
View	Displays the Task Home
Task ID	Displays the Task Home

Search	Displays a list of tasks due based upon the Deadline Date
Reset	Resets the Deadline Date to the current date.
<<Previous	Displays the previous 50 reserved tasks matching the specified criteria. This action is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of reserved tasks (up to 50) matching the specified criteria. This action is only displayed when there are additional records to be displayed.

Data Elements

The following data elements are specific to the Reserved Tasks Due on Date or Before pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Deadline Date	The date used to search for tasks due on or before	Date MM/DD/YYYY	Yes	Current date	Yes
Subject	A short summary of the purpose or content of the task.	String	No	No	No
Priority	The priority of the task, e.g. High, Medium or Low.	String	No	No	No
Status	Status of the task. Open Deferred Closed	String	No	No	No
Deadline	The date and time the task is scheduled for completion.	Date Timestamp MM/DD/YYYY HH: MM	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reserved Tasks by Status

CI	Document Name
CI-116587 - DSD SC Reserved Tasks by Status CANCELLED	DSD_SC_Reserved_Tasks_by_Status.doc

Cancelled by ASR Sprint 57 Team 1&2.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reserved Tasks by Priority

CI	Document Name
CI-116586 - DSD SC Reserved Tasks by Priority CANCELLED	DSD_SC_Reserved_Tasks_by_Priority.doc

Cancelled by ASR Sprint 57 Team 1&2.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Assigned Tasks

CI	Document Name
CI-67428 - DSD SC Assigned Tasks IMPLEMENTED	DSD_SC_Assigned_Tasks.doc

When the Assigned Tasks link is selected from the expanded Shortcuts panel for Tasks the Assigned Tasks screen displays allowing the user to view a list of their assigned tasks. If the user accesses the Reserve Task pop-up from this screen, the 'Reserve' and 'Cancel' actions on the pop-up return the user to this screen.

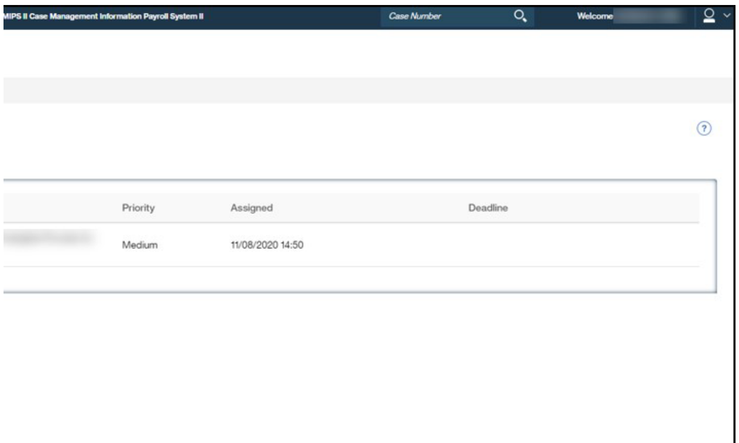


Figure – Assigned Tasks

Actions/Functions

The following actions are associated with the Assigned Tasks screen:

Actions	Function
<<Previous	Displays the previous 50 assigned tasks. This action is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of assigned tasks (up to 50). This action is only displayed when the user has more than 50 Assigned Tasks
Reserve	Displays the Reserved Task pop-up.
<Task ID>	Displays the Task Home screen for the task.

Data Elements

The following data elements are specific to the Assigned Tasks screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Subject	A short summary of the purpose or content of the task.	String	No	No	No
Priority	The priority of the task, e.g. High, Medium or Low.	String	No	No	No
Assigned	The date and time the task was assigned to the user.	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
Deadline	The date and time the task is scheduled for completion	Date Timestamp MM/DD/YYYY HH:MM	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Deferred Tasks

CI	Document Name
CI-117822 - DSD SC Deferred Tasks IMPLEMENTED	DSD_SC_Deferred_Tasks.doc

The Deferred Tasks screen displays when the Deferred Tasks link is selected from the expanded Shortcut panel for Tasks. This screen allows a user to view a list of deferred tasks.

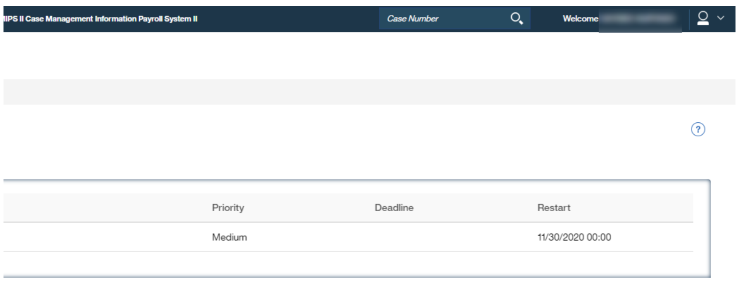


Figure – Deferred Tasks

Actions/Functions

The following actions are associated with the Deferred Tasks screen:

Actions	Function
<<Previous	Displays the previous 50 deferred tasks. This action is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of deferred tasks (up to 50). This action is only displayed when there are additional records to be displayed.
Restart	Displays the Restart Task pop-up
<Task ID>	Displays the Task Home screen for the task.

Data Elements

The following data elements are specific to the Deferred Tasks screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Subject	A short summary of the purpose or content of the task.	String	No	No	No
Priority	The priority of the task, e.g. High, Medium or Low.	String	No	No	No
Deadline	The date and time the task is scheduled for completion.	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
Restart	The date and time the task is scheduled to be restarted.	Date Timestamp MM/DD/YYYY HH:MM	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reserved Tasks

CI	Document Name
CI-117821 - DSD SC Reserved Tasks IMPLEMENTED	DSD_SC_Reserved_Tasks.doc

When the Reserved Tasks link is selected from the Expanded Shortcuts Panel for Tasks the Reserved Tasks screen displays a list of Tasks Reserved by the user. A user can print (Ctrl P) the screen to obtain a hard copy list of their active tasks.

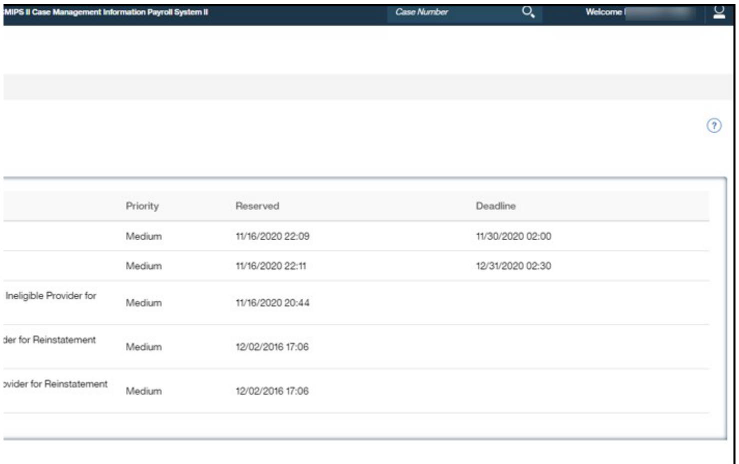


Figure – Reserved Tasks

Actions/Functions

The following actions are associated with the Reserved Tasks screen:

Actions	Function
<<Previous	Displays the previous 50 reserved tasks. This action is only displayed when there are previous records to be displayed.
Next>>	Displays the next group of reserved tasks (up to 50). This action is only displayed when there are additional records to be displayed.
View	Displays the Task Home screen for the task.
<Task ID>	Displays the Task Home screen for the task.

Data Elements

The following data elements are specific to the Reserved Tasks screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Subject	A short summary of the purpose or content of the task.	String	No	No	No
Priority	The priority of the task, e.g. High, Medium or Low.	String	No	No	No
Reserved	The date and time the user reserved the task	Date timestamp MM/DD/YYYY HH: MM	No	No	No
Deadline	The date and time the task is scheduled for completion.	Date timestamp MM/DD/YYYY HH: MM	No	No	No
Comment	User comments on this record. Comments are 200 characters in length.	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Task Home

CI	Document Name
CI-67413 - DSD SC Task Home IMPLEMENTED	DSD_SC_Task_Home.doc

This screen allows a user to view details on a task. This screen displays when the View or the Task ID link is selected from the Reserved, Assigned, or Deferred Task screens. This screen also displays when a user selects Reserve & View on the Reserve Task pop-up or when the Task ID link is selected on the Active Tasks list or the All Tasks list accessed from Case Home. If the user accesses the Reserve Task pop-up from this screen, the 'Reserve' and 'Cancel' actions on the pop-up return the user to this screen. In addition, if the user accesses the Un-reserve Task pop-up from this screen, the 'UnReserve' and 'Cancel' actions on the pop-up return the user to this screen.

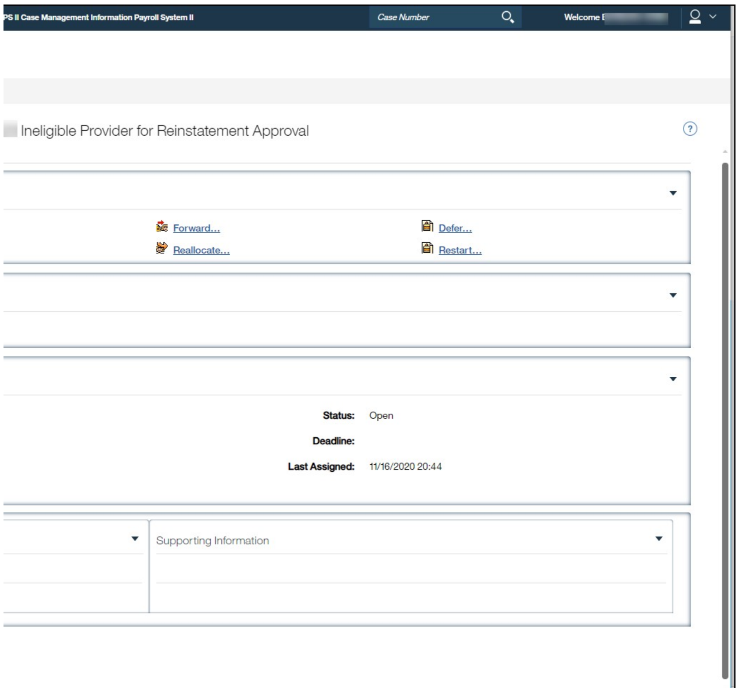


Figure – Task Home

Actions/Functions

The following actions are associated with the Task Home screen:

Actions	Function
Content Tabs	
Task History	Displays the Task History screen which show the history of the task.
Assignment List	Displays the Task Assignment List screen.
Manage	
Add Comment	Displays the Add Comment pop-up
Close	Displays the Close Task pop-up
Reserve	Displays the 'Reserve Task' pop-up.
Un-Reserve	Displays the Un-Reserve Task pop-up.
Forward	Displays the Forward Task pop-up.

Reallocate	Displays the Reallocate Task pop-up.
Defer	Displays the Defer Task pop-up.
Restart	Displays the Restart Task pop-up.
Details	
<Reserved By>	The user by which the Task is currently Reserved. Selecting this link opens the User Home screen. If the Task is not reserved this field will be blank
[Change]	Displays the Change Time Worked pop-up.
Primary Action	
<Primary Action Screen Name>	Displays the screen on which the primary action may be taken.
Supporting Details	
Supporting Information	Other links associated with this task.

Data Elements

The following data elements are specific to the Task Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Task ID	The unique reference number of the task. This is automatically generated by the system when the task is created.	Number	No	No	No
Status	Status of the task. Open Deferred Closed	String	No	No	No
Priority	The priority of the task, e.g. High, Medium or Low.	String	No	No	No
Deadline	The date and time the task is scheduled for completion. This field will be blank if there is no Task Deadline assigned.	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
Last Assigned	The date and time the task was last assigned, e.g. When the task was created, forwarded, reserved, unreserved or reallocated.	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
Time Worked	The total number of hours and minutes spent by users on this task. Displays in HH:MM format.	Number	No	No	No
Subject	The subject of the task.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Add Comment

CI	Document Name
CI-67453 - DSD SC Add Comment IMPLEMENTED	DSD_SC_Add_Comment.doc

When the Add Comment link is selected from the Manage cluster on the Task Home, the Add Comment pop-up displays allowing the user to add a comment to an existing task.

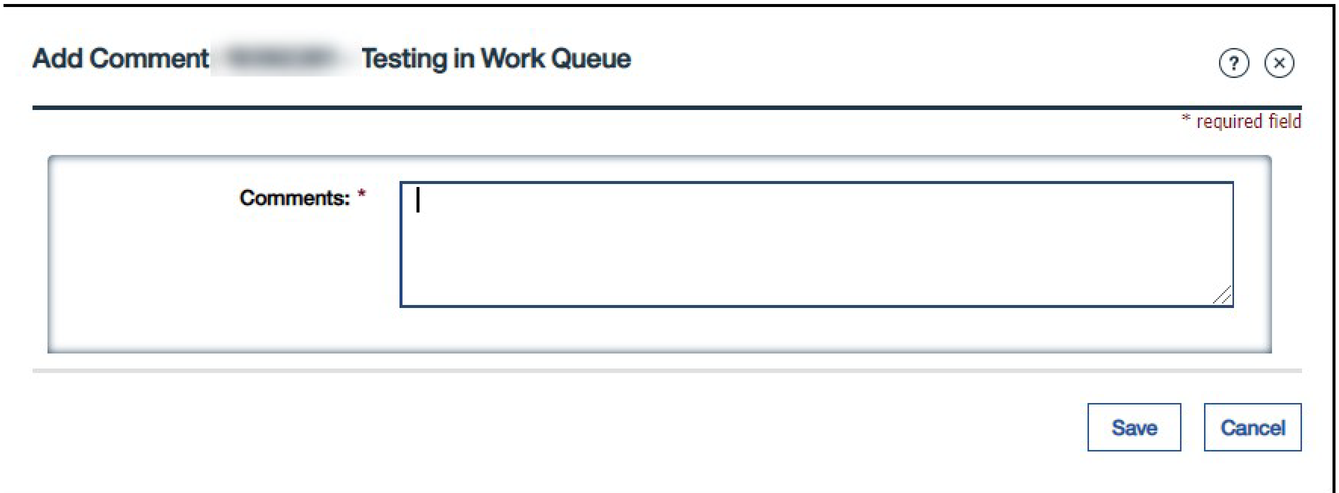


Figure – Add Comment

Actions/Functions

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

Actions	Function
Save	Saves the comment and displays the Task Home screen.
Cancel	Cancels the action and displays the Task Home screen

Data Elements

The following data elements are specific to the Add Comment pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Comments	User comments on this record. Comments are 200 characters in length.	Text	Yes	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Close Task

CI	Document Name
CI-67466 - DSD SC Close Task IMPLEMENTED	DSD_SC_Close_Task.doc

When the Close link is selected from the Manage cluster on the Task Home, then Close Task pop-up displays allowing the user to enter a comment and close the task.

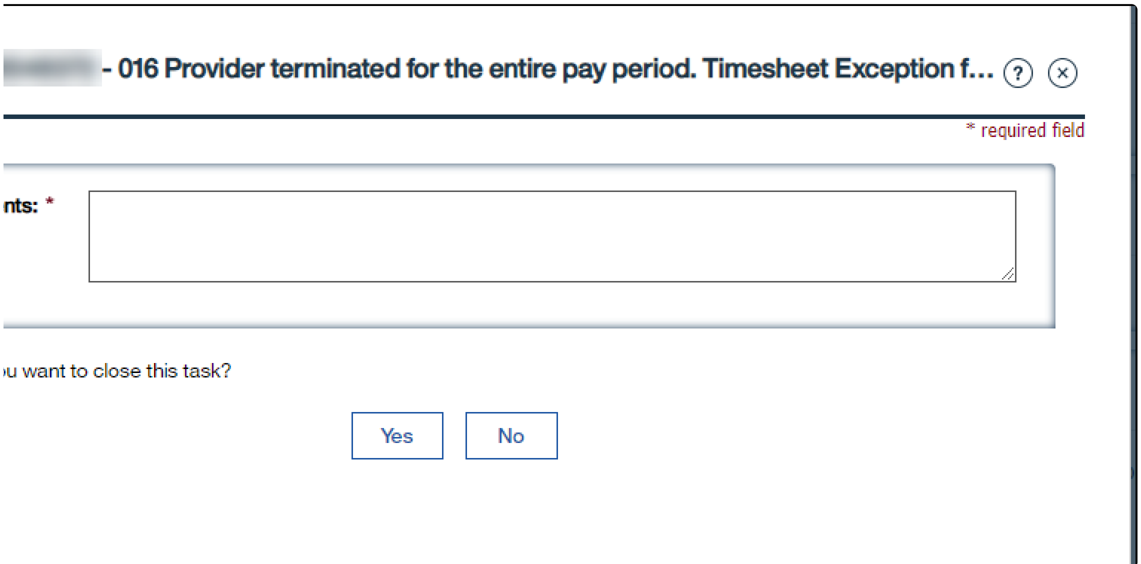


Figure – Close Task

Actions/Functions

The following actions are associated with the Close Task pop-up:

Actions	Function
Yes	Processed the Close Task action and displays the Task Home with the Status changed to Closed
No	Dismissed the screen and displays the Task Home with no update to the Status

Data Elements

The following data elements are specific to the Close Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Comments	User comments on this record. Comments are 200 characters in length	Text	Yes	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reserve Task

CI	Document Name
CI-67431 - DSD SC Reserve Task IMPLEMENTED	DSD_SC_Reserve_Task.doc

When the Reserve link is selected from the Manage section of the Task Home or when the Reserve link is selected from the Assigned Tasks screen, Reserve Task pop-up displays allowing the user to Reserve the Task.

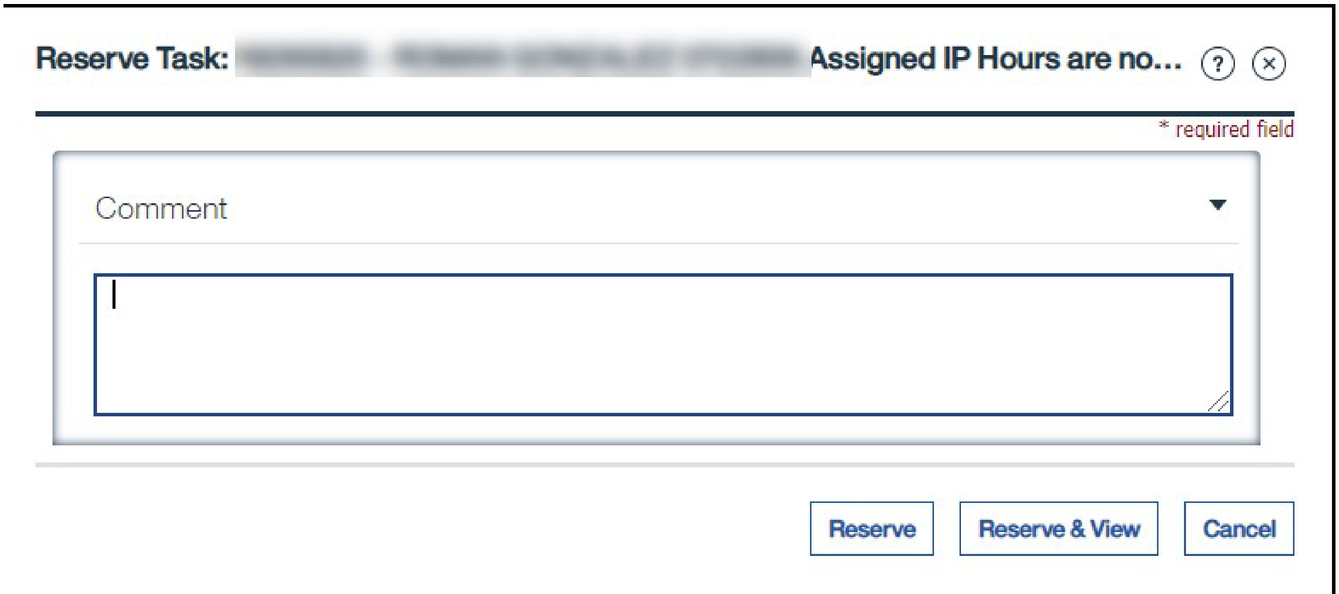


Figure – Reserve Task

Actions/Functions

The following actions are associated with the Reserve Task pop-up:

Actions	Function
Reserve	Reserves the task to the current user and returns the user to Task Home screen if the pop-up was accessed from the Task Home screen; otherwise, the the Assigned Tasks screen displays if the pop-up was accessed from the Assigned Tasks screen.
Reserve & View	Reserves the task to the current user and opens the Task Home screen.
Cancel	Dismisses the action and displays the Task Home screen if the pop-up was accessed from the Task Home screen; otherwise, the the Assigned Tasks screen displays if the pop-up was accessed from the Assigned Tasks screen.

Data Elements

The following data elements are specific to the Reserve Task pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Comment	User comments on this record. Comments are 200 characters in length.	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Un-Reserve Task

CI	Document Name
CI-67420 - DSD SC UnReserve Task IMPLEMENTED	DSD_SC_UnReserve_Task.doc

When the 'Un-reserve' link is selected from Task Home screen, the Un-reserve Task pop-up displays. If a comment is inserted and the pop-up is confirmed, the task is removed from a user's reserved tasks list and the task is then listed on Assigned Tasks screen. When the Un-reserve Task pop-up is confirmed, it returns the user to the Task Home screen.

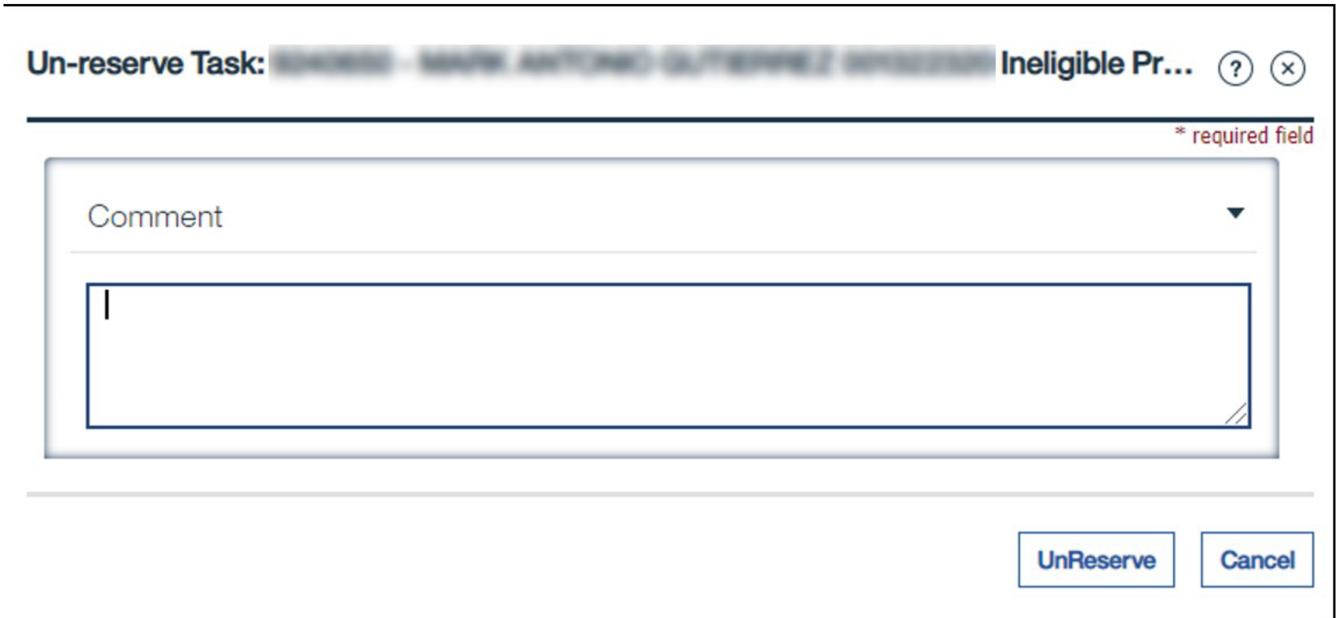


Figure – Un-reserve Task

Actions/Functions

The following actions are associated with the Un-reserve Task pop-up:

Actions	Function
UnReserve	Un-reserves the task and returns the user to the Task Home
Cancel	Cancels the action and returns the user to the Task Home

Data Elements

The following data elements are specific to the Un-reserve Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Comment	User comments on this record. Comments are 200 characters in length.	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Forward Task

CI	Document Name
CI-67462 - DSD SC Forward Task IMPLEMENTED	DSD_SC_Forward_Task.doc

When the Forward link is selected from the Manage cluster of the Task Home the Forward Task pop-up displays allowing the user to forward the Task to another User or Work Queue. The task must be reserved by the User in order to forward the task.

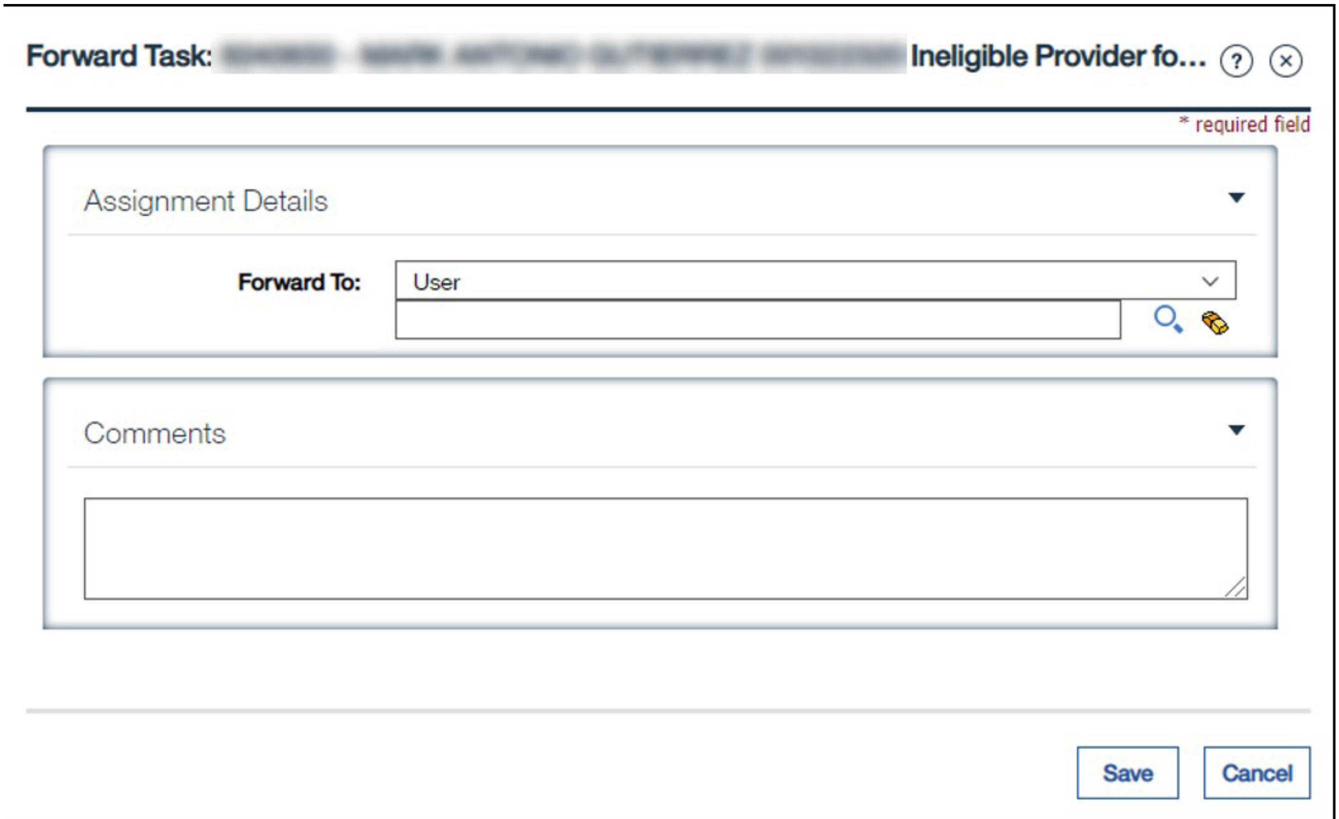


Figure – Forward Task

Actions/Functions

The following actions are associated with the Forward Task pop-up:

Actions	Function
Search Look-up	The Search Look-up will display the user Search screen or the list of Work Queues depending upon the Forward To value.
Save	Processes the Forward Task action and displays the Task Home.
Cancel	The cancel action and displays the Task Home

Data Elements

The following data elements are specific to the Forward Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Forward To	The item to which the task is to be forwarded. This can be a User or Work Queue.	Drop-down List	Yes	User	Yes
Comments	User comments on this record. Comments are 200 characters in length.	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reallocate Task

CI	Document Name
CI-67417 - DSD SC Reallocate Task IMPLEMENTED	DSD_SC_Reallocate_Task.doc

When the Reallocate link is selected from the Manage cluster on the Task Home the Reallocate Task pop-up displays allowing the user to reallocate the Task. Reallocated tasks are reset to the beginning of their workflow process.

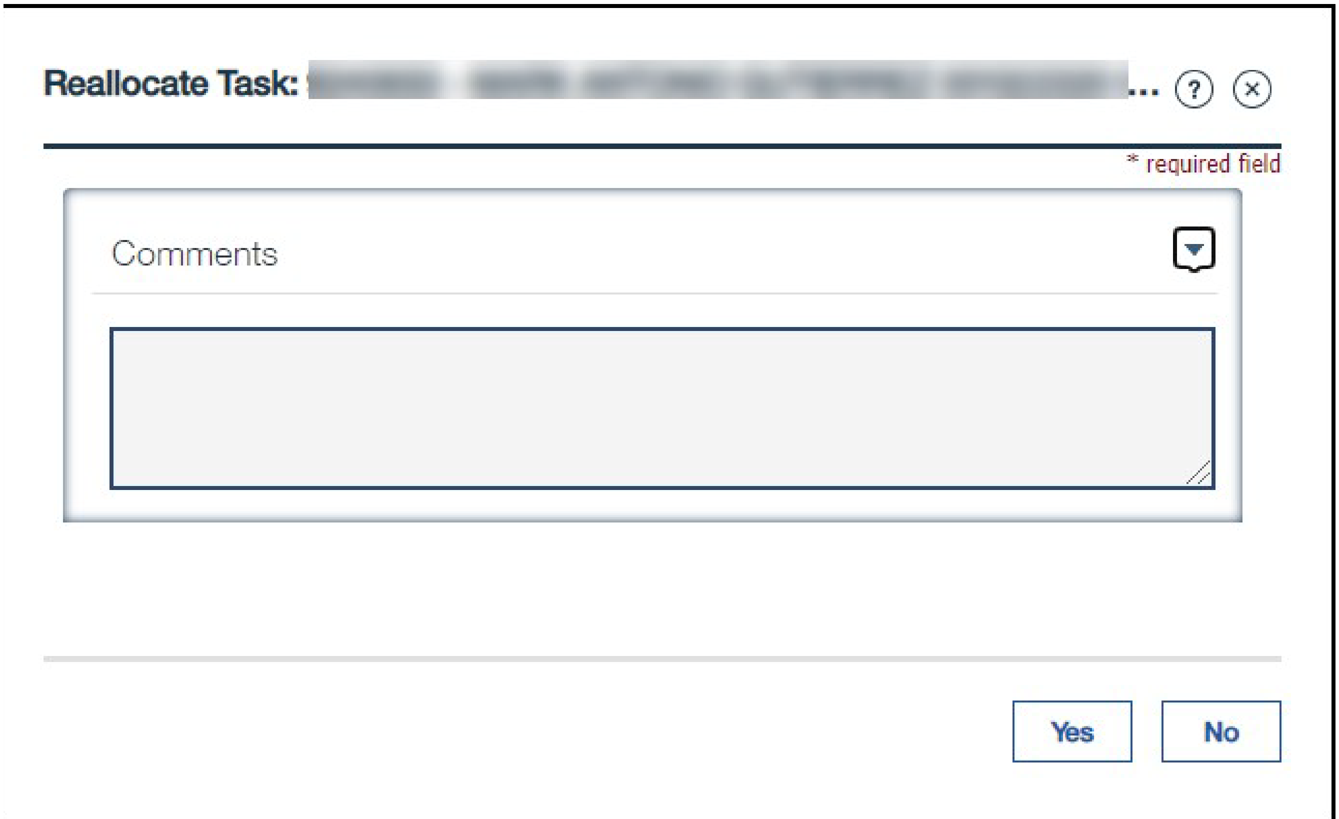


Figure – Reallocate Task

Actions/Functions

The following actions are associated with the Reallocate Task pop-up:

Actions	Function
Yes	Process the Reallocate Action and displays the Task Home
No	Cancels the action and displays the Task Home

Data Elements

The following data elements are specific to the Reallocate Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Comments	User comments on this record. Comments are 200 characters in length.	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Defer Task

CI	Document Name
CI-67445 - DSD SC Defer Task IMPLEMENTED	DSD_SC_Defer_Task.doc

When the Defer link is selected from the Manage cluster of the Task Home the Defer Task pop-up displays allowing the user to defer the task. This action takes the task out of reserved status and assigns it to the user's Deferred Tasks. The Restart Date may be indicated if the user wants the Task to automatically return to Open Status as of the specified date.

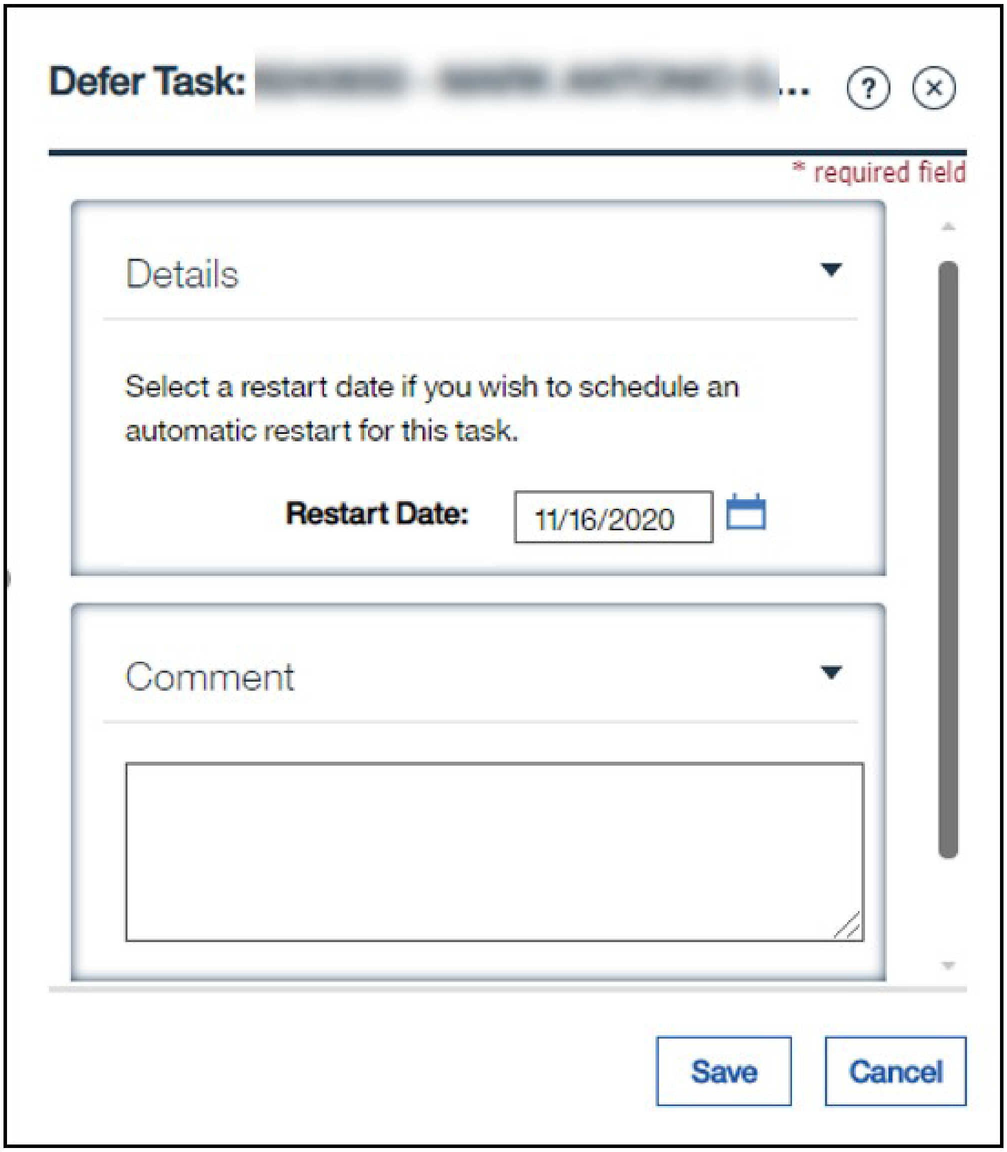


Figure – Defer Task

Actions/Functions

The following actions are associated with the Defer Task pop-up:

Actions	Function
Save	Processes the Defer Task action and displays the Task Home with the Status updated to Deferred.

Cancel	Cancels the action and displays the Task Home.

Data Elements

The following data elements are specific to the Defer Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Restart Date	The date on which the user would like the task to return to a status of open. This would mean that the task would be moved from the deferred to the reserved list.	Date	No	Current Date	Yes
Comment	User comments on this record. Comments are 200 characters in length.	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Restart Task

CI	Document Name
CI-67438 - DSD SC Restart Task IMPLEMENTED	DSD_SC_Restart_Task.doc

When the Restart link is selected from the Manage cluster on the Task Home the Restart Task pop-up displays allowing the user to return the task to their Reserved Task list.

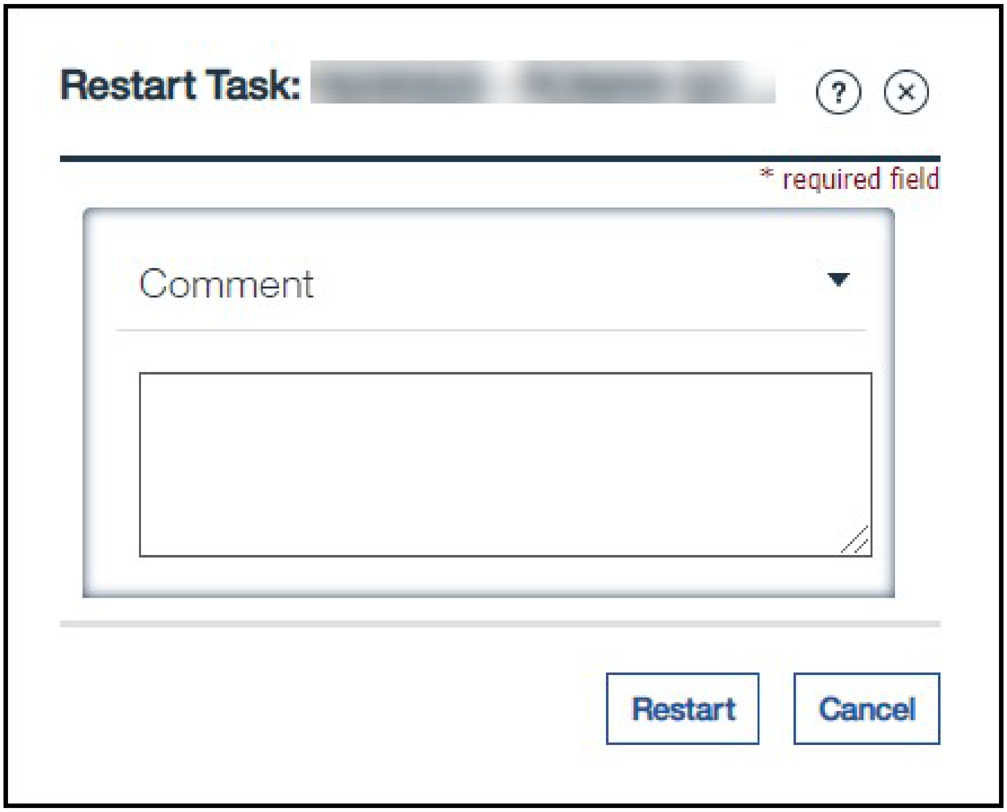


Figure - Restart Task

Actions/Functions

The following actions are associated with the Restart Task pop-up:

Actions	Function
Restart	The task status is set to open and the restart date is set to a blank value.
Cancel	Cancels the action and returns the user to the Task Home screen.

Data Elements

The following data elements are specific to the Restart Task pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Comment	User comments on this record. Comments are 200 characters in length.	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Change Time Worked

CI	Document Name
CI-116573 - DSD SC Change Time Worked IMPLEMENTED	DSD_SC_Change_Time_Worked.doc

The Change Time Worked pop-up displays when the Change link is selected from the Time Worked field in the Details cluster on the Task Home. This pop-up allows a user to update the time worked on a specific task.

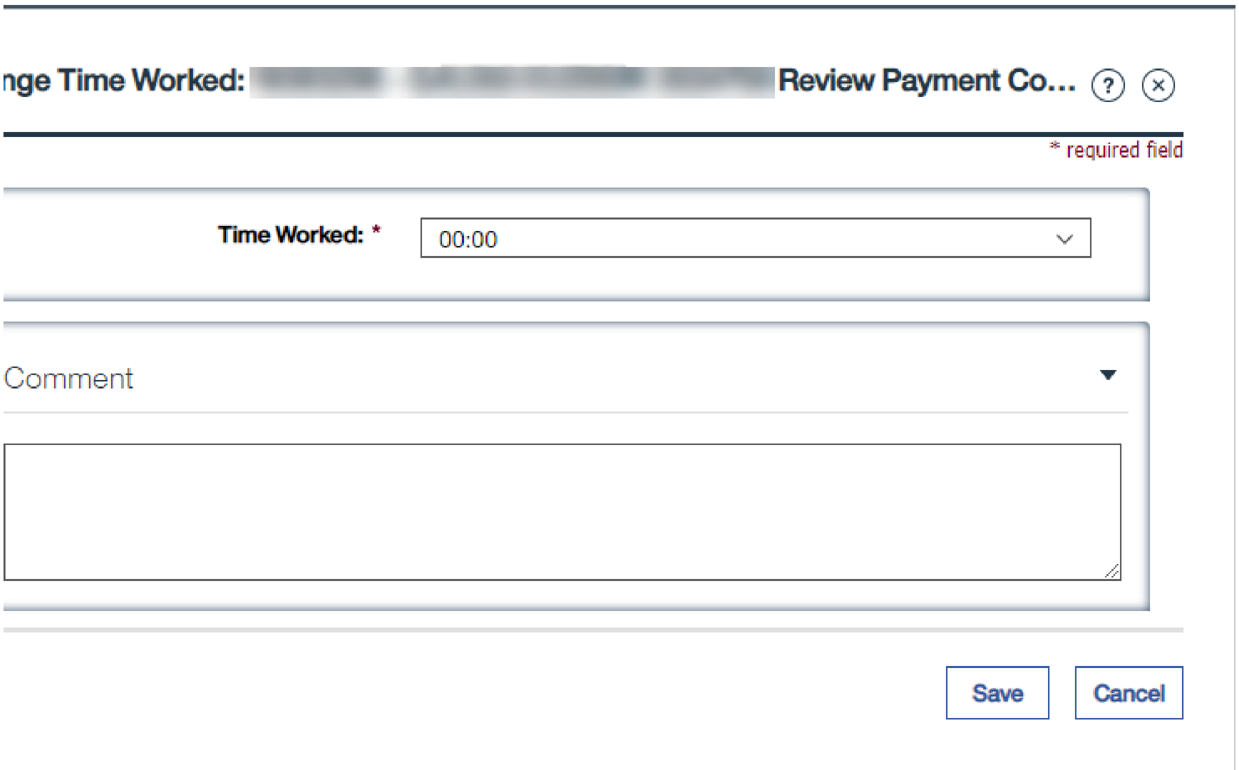


Figure - Change Time Worked

Actions/Functions

The following actions are associated with the Change Time Worked pop-up:

Actions	Function
Save	The Save action updates the time worked for the task and returns the user to the Task Home screen.
Cancel	The Cancel action dismisses the pop-up displaying the Task Home screen.

Data Elements

The following data elements are specific to the Change Time Worked pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Time Worked	Hours and Minutes worked on a task.	Drop down	Yes	0:00	Yes
Comment					
Comment	User comments on this record. Comments are 200 characters in length	Text	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Task History

CI	Document Name
CI-67402 - DSD SC Task History IMPLEMENTED	DSD_SC_Task_History.doc

The Task History screen displays when the Task History tab is selected from the Task Home screen. This screen allows a user to view task history.

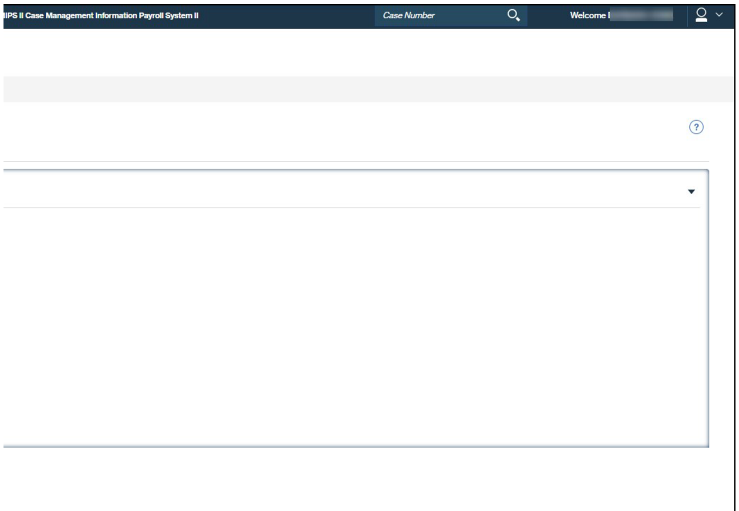


Figure – Task History

Actions/Functions

The following actions are associated with the Task History screen:

Actions	Function
View Task	This link allows a user to view task details.
Assignment List	This link allows a user to view a list of task assignments.

Data Elements

The following data elements are specific to the Task History screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Comment	Display of actions and comments for a task.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Task Assignment List

CI
CI-67415 - DSD SC Task Assignment List IMPLEMENTED

The Task Assignment List screen displays when the Assignment List tab is selected from the Task Home screen. This screen allows a user to view the user or work queue currently assigned to a task.

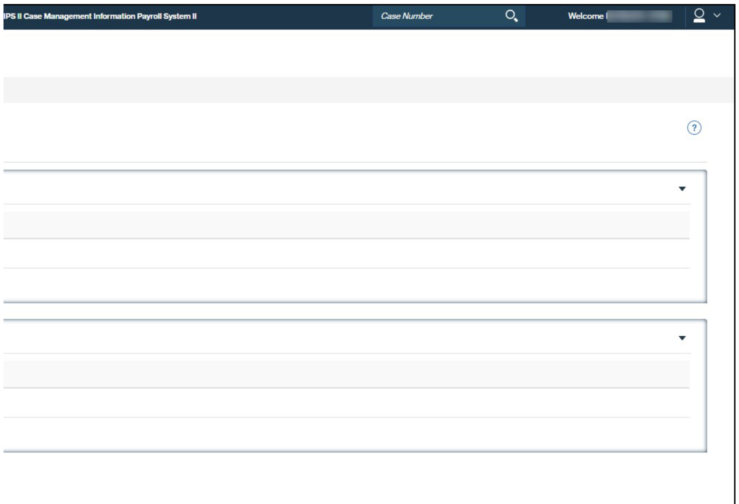


Figure – Task Assignment List

Actions/Functions

The following actions are associated with the Task Assignment List screen:

Actions	Function
Content Tabs	
View Task	Displays the Task Home screen
Task History	Displays the Task History screen
Users	
<User Name>	Displays the User Details pop-up
Work Queues	
<Work Queue Name>	Displays the Work Queue Task screen from which the Task originated

Data Elements

The following data elements are specific to the Task Assignment List screen:

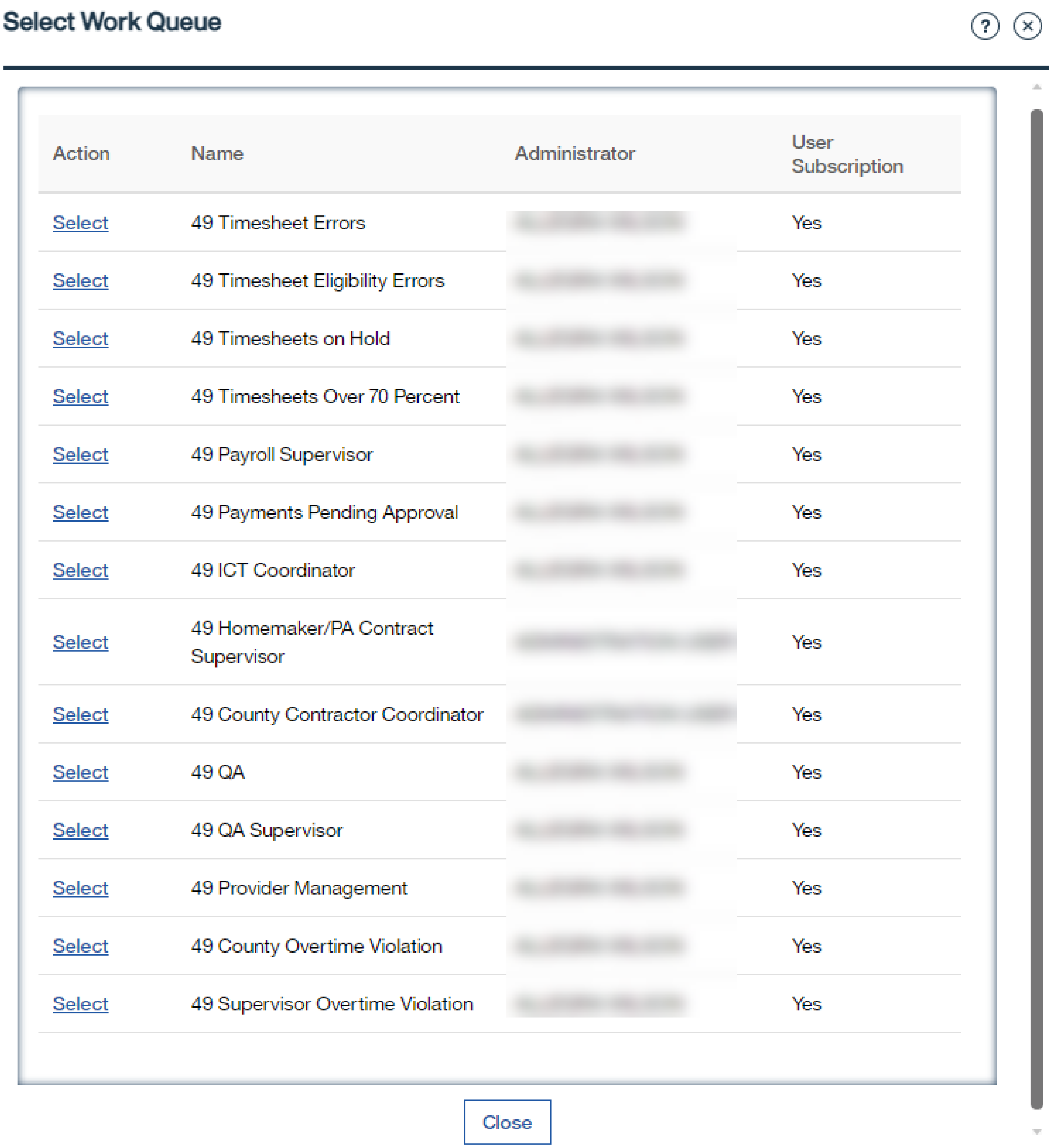
Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Users					
User Name	Name of the user(s) currently assigned to a task. The task also appears in each of user's assigned task list.	String	No	No	No
Work Queues					

Work Queue Name	Name of the work queue(s) to which the task is currently assigned.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Select Work Queue

CI	Document Name
CI-116592 - DSD SC Select Work Queue IMPLEMENTED	DSD_SC_Select_Work_Queue.doc

When Work Queue is selected in the Assignment Details cluster of the Forward Task pop-up the Select Work Queue pop-up displays allowing the user to select the Work Queue to which the task should be forwarded.



Select Work Queue

Action	Name	Administrator	User Subscription
Select	49 Timesheet Errors	[illegible]	Yes
Select	49 Timesheet Eligibility Errors	[illegible]	Yes
Select	49 Timesheets on Hold	[illegible]	Yes
Select	49 Timesheets Over 70 Percent	[illegible]	Yes
Select	49 Payroll Supervisor	[illegible]	Yes
Select	49 Payments Pending Approval	[illegible]	Yes
Select	49 ICT Coordinator	[illegible]	Yes
Select	49 Homemaker/PA Contract Supervisor	[illegible]	Yes
Select	49 County Contractor Coordinator	[illegible]	Yes
Select	49 QA	[illegible]	Yes
Select	49 QA Supervisor	[illegible]	Yes
Select	49 Provider Management	[illegible]	Yes
Select	49 County Overtime Violation	[illegible]	Yes
Select	49 Supervisor Overtime Violation	[illegible]	Yes

Close

Figure – Select Work Queue

Actions/Functions

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

Actions	Function
Select	Displays the Forward Task pop-up with the selected Work Queue displayed
Close	Dismissed the screen and displays the Forward Task pop-up

Data Elements

The following data elements are specific to the Select Work Queue pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	Name of the work queue	String	No	No	No
Administrator	Displays the user who is the administrator for the work queue.	String	No	No	No
User Subscription	Indicates whether or not a user can subscribe themselves to a work queue.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Active Task List from Case Home

CI	Document Name
CI-67441 - DSD SC Active Task List from Case Home IMPLEMENTED	DSD_SC_Active_Task_List_from_Case_Home.doc

When the Tasks Page Navigation is selected from the Case Home Content Tab the Tasks screen for the Active Tasks content tab displays a list of active (status of open or deferred) tasks associated with this case.

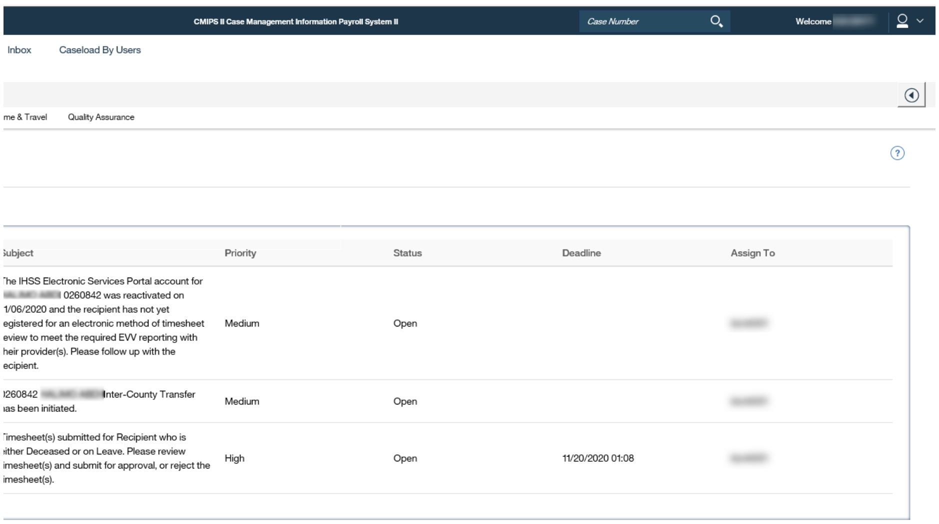


Figure – 'Active Tasks' List from Case Home

Actions/Functions

The following actions are associated with the Active Task list from Case Home screen:

Actions	Function
New	Displays the Create User Task screen.
<Task ID>	Displays the Task Home screen for the task.
Content Tabs	
Active Tasks	Displays the current screen (Active Tasks).
All Tasks	Displays the All Tasks screen.

Data Elements

The following data elements are specific to the Active Task list from Case Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Subject	The subject of the task	String	No	No	No
Priority	The priority of the task	String	No	No	No
Status	The status of the task	String	No	No	No
Deadline	The deadline of the task (MM/DD/YYYY)	Date	No	No	No

Assign To	The user name or work queue to which this task is assigned.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/All Task List from Case Home

CI
CI-67424 - DSD SC All Tasks List from Case Home IMPLEMENTED

When the All Tasks Content Tab is selected from the Active Tasks screen the All Tasks screen displays. The default displays is all tasks associated with the case for the most recent six-month period regardless of Status. The user may search for Tasks for other periods of time.
Role Name: PROGRAMMGMTROLE

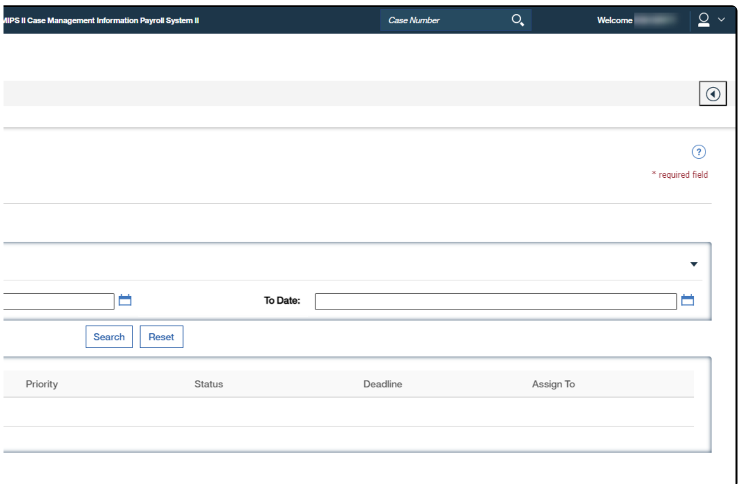


Figure – 'All Tasks' List from Case Home

Actions/Functions

The following actions are associated with the All Task list screen:

Actions	Function
New	Displays the Create User Task screen.
Search	Searches for all tasks based on the dates entered in From Date and To Date. **Note:** Task Search is limited to a 6 month period. The 'From Date' must be no more than 6 months before the 'To Date'.
Reset	Clears both the entered search criteria and the search results.
Task List	
<Task ID>	Displays the Task Home screen for the task.
Content Tabs	
Active Tasks	Displays the current screen (Active Tasks).
All Tasks	Displays the All Tasks screen.

Data Elements

The following data elements are specific to the All Task list screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria					
From Date	Date user wants to begin from search on.	Date MM/DD/YYYY	No	No	Yes

To Date	The date on which the user wants search to end.	Date MM/DD/YYYY	No	No	Yes
Task List					
Subject	The subject of the task.	String	No	No	No
Priority	The priority of the task.	String	No	No	No
Status	The status of the task.	String	No	No	No
Deadline	The deadline of the task.	String	No	No	No
Assign To	The user name or work queue to which this task has been assigned.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Case Search

CI	Document Name
CI-67401 - DSD SC Case Search IMPLEMENTED	DSD_SC_Case_Search.doc

When the Case link is selected from the Task Search screen the Case Search pop-up displays allowing a user to Search for a case based upon the Case Number, or Recipient First Name, and Recipient Last Name fields. Results are displayed in the Search Results area.

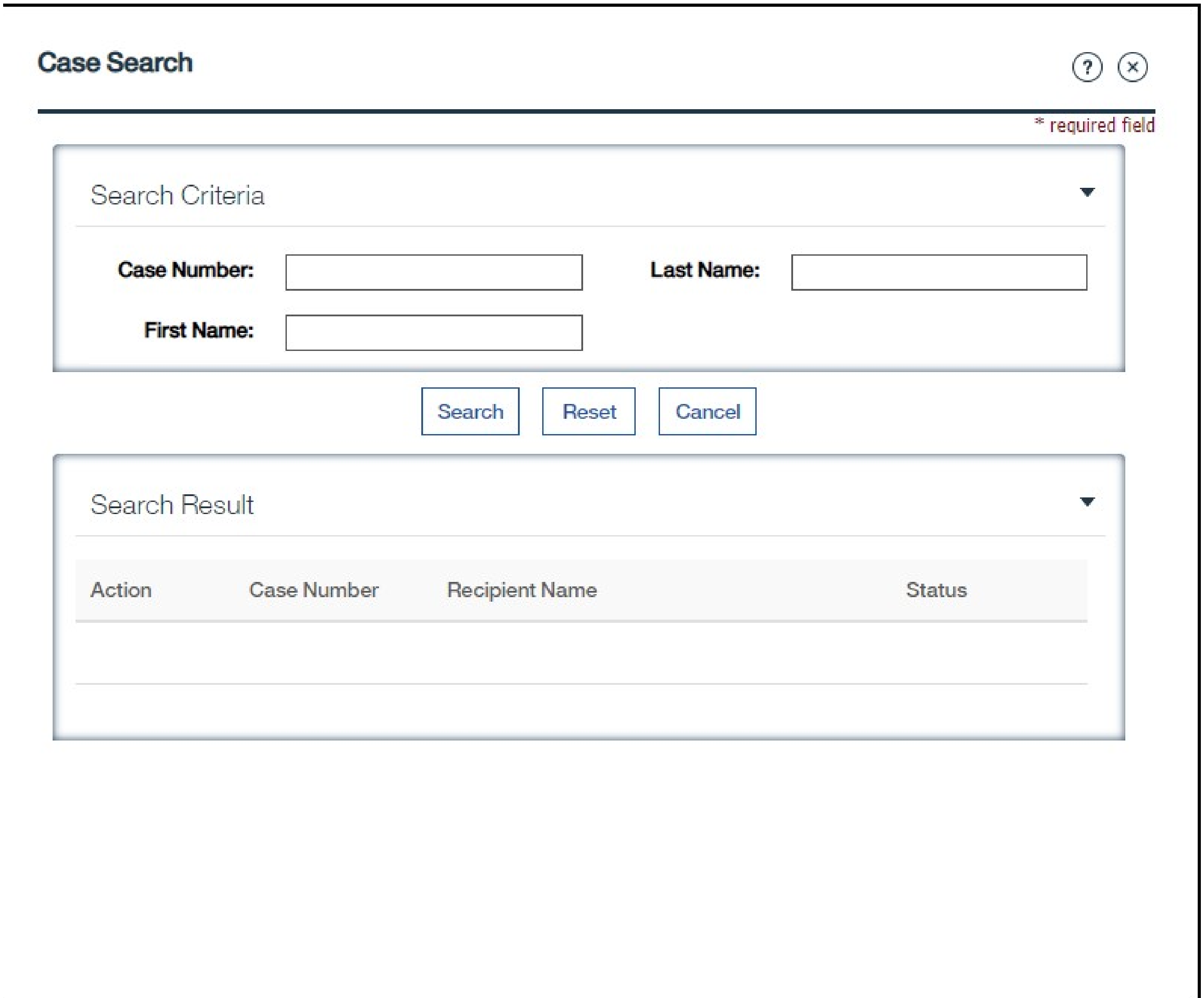


Figure – Case Search

Actions/Functions

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

Actions	Function
Search	Processes the Case Search based upon the data entered
Reset	Clear all Search Criteria fields

Cancel	Dismisses the screen and displays the Task Search screen
Search Result	
Select	Displays the Task Search screen with the Case Number displayed in the Case field in the Search Criteria cluster
<Case Number>	Displays the Case Home

Data Elements

The following data elements are specific to the Case Search pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria					
Case Number	The case identifier generated by the system. Either the case number or last name is required.	String	No	No	Yes
First Name	Recipient first name.	String	No	No	Yes
Last Name	Recipient last name. Either the case number or the last name is required. The search on the last name is based upon the full last name on the case.	String	No	No	Yes
Search Results					
Case Number	The case identifier generated by the system.	String	No	No	No
Recipient Name	First name concatenated by the last name	String	No	No	No
Status	Status of a case	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/My Work Queues

CI	Document Name
CI-67429 - DSD SC My Work Queues IMPLEMENTED	DSD_SC_My_Work_Queues.doc

From the expanded Inbox Shortcuts panel when the user selects the Work Queues link from Work Queue tab the My Work Queues screen displays a list of the work queues to which the user is subscribed.

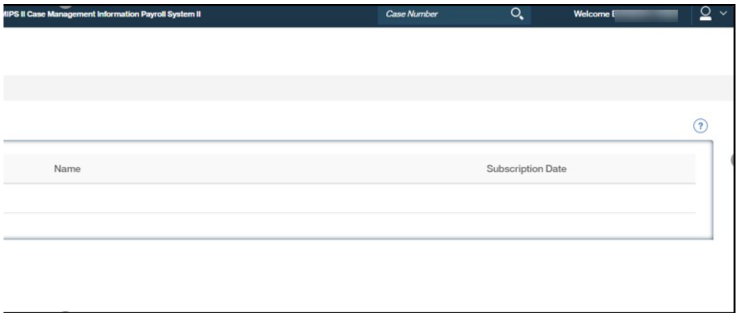


Figure – My Work Queues

Actions/Functions

The following actions are associated with the My Work Queues screen:

Actions	Function
View	Click the View link on the appropriate row to view the work queue.

Data Elements

The following data elements are specific to the My Work Queues screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	The work queue name.	String	No	No	No
Subscription Date	The date the user subscribed to the work queue.	Date MM/DD/YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Work Queue Tasks

CI
CI-67427 - DSD SC Work Queue Tasks IMPLEMENTED

When the View link associated to a specific Work Queue is selected, the Work Queue Task screen displays with a list of tasks in the selected work queue. Up to 50 tasks display sorted oldest to newest.

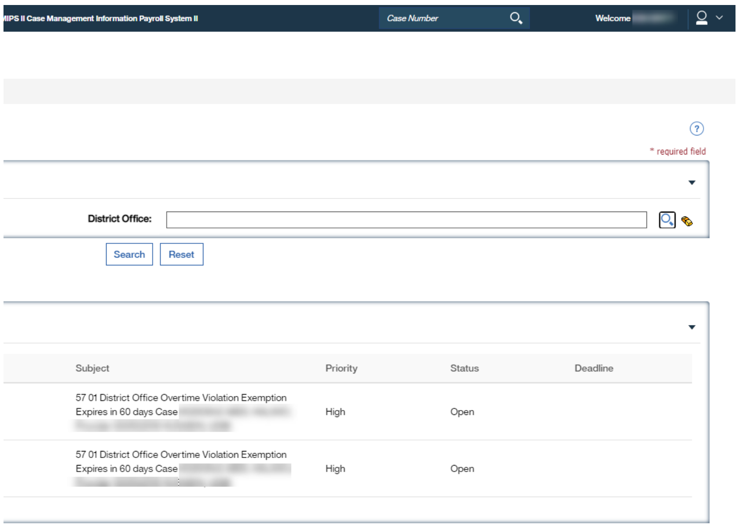


Figure – Work Queue Tasks

Actions/Functions

The following actions are associated with the Work Queue Tasks screen:

Actions	Function
Search	Searches for all tasks based on District Office Unit selected
Reset	Clears search results and resets task list to default sort
Reserve Next 5 Tasks	Reserves the next five tasks from the selected Work Queue
Search Criteria	
District Office	Display District Office Search Pop Up
Total Tasks List	
Reserve	Displays the Reserve Task pop-up.
<Task ID>	Displays the Task Home screen for the task.

Data Elements

The following data elements are specific to the Work Queue Tasks screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Work Queue Tasks	Total Tasks in the combined user's work queues.	String	No	No	No

Total Tasks List					
Total Tasks	Total Tasks in the selected work queue.	String	No	No	No
District Office	The District Office associated to the task. **Note:** The DO displayed is derived from the Case Owner.	String	No	No	No
Subject	A short summary of the purpose or content of the task.	String	No	No	No
Priority	The priority of the task, e.g. High, Medium, or Low.	String	No	No	No
Status	The status of the task.	String	No	No	No
Deadline	The date the task is scheduled for completion.	Date MM/DD/YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/My Notifications

CI	Document Name
CI-67448 - DSD SC My Notifications IMPLEMENTED	DSD_SC_My_Notifications.doc

From the Expanded Inbox Shortcuts Panel when the Notifications link is selected from the Notifications tab the My Notifications screen displays. If more than 100 tasks exist for the user an informational message displays directly above the "Inactivate Selected" button "Displaying 100 of XXXX".

CMIPS II Case Management Information Payroll System II | Case Number | Welcome

	Category	Date
Provider	Standard	12/29/2020 14:34
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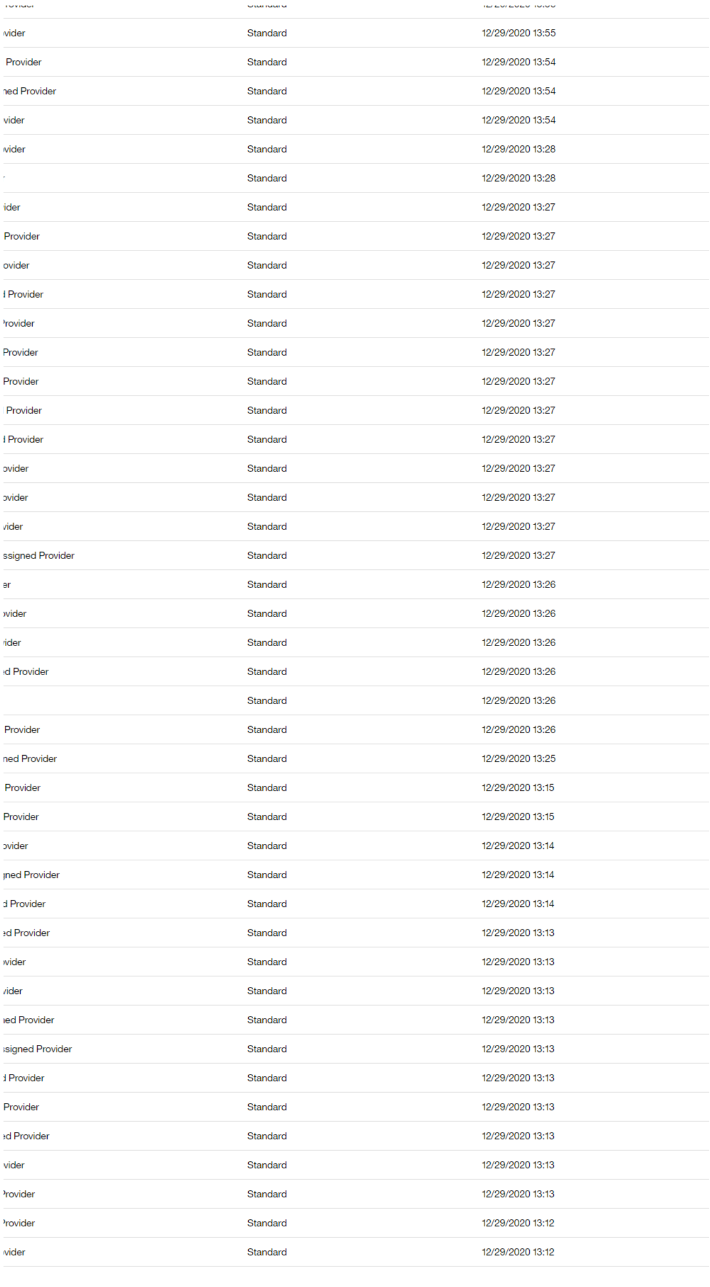

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Figure – My Notifications

Actions/Functions

The following actions are associated with the My Notifications screen:

Actions	Function
Inactivate Selected	When the user has selected one or more of the listed task the Inactivate Notification screen displays allowing the user to confirm the Inactivate action.
Notification List	
View	Displays the View Notification screen

Data Elements

The following data elements are specific to the My Notifications screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Selection Checkbox	Allows the ability to select one to many records and mark for deletion.	Checkbox	No	No	Yes
Subject	A short summary of the purpose or content of the notification.	String	No	No	No
Category	This is used for displaying the category to which the workflow-generated notifications belongs.	String	No	No	No
Date	The date and time the notification was created in the system.	Date Timestamp MM/DD /YYYY HH:MM	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/View Notification

CI	Document Name
CI-67439 - DSD SC View Notification IMPLEMENTED	DSD_SC_View_Notification.doc

When the View link is selected from the My Notifications screen the View Notification screen displays.

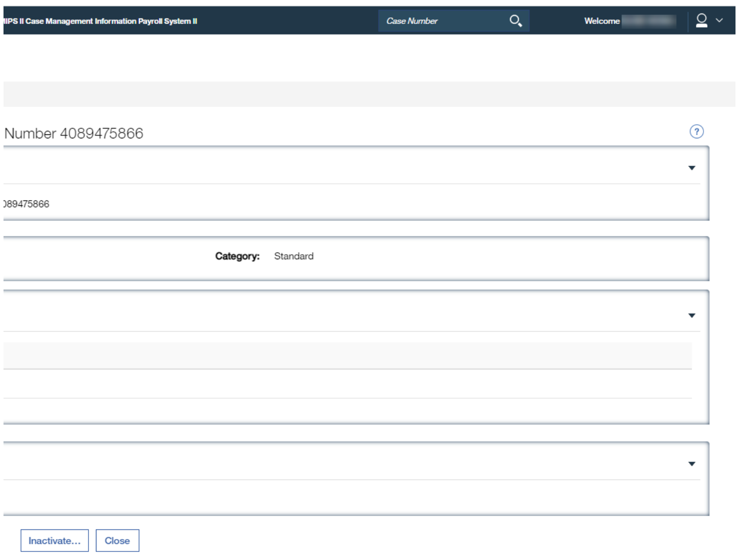


Figure – View Notification

Actions/Functions

The following actions are associated with the View Notification screen:

Actions	Function
Inactivate	Displays the Inactivate Notification pop-up for the current notification
Close	Closes the screen and returns the user to the My Notification screen.
Related Pages	
<Action Link Screen Name>	Links to screens containing data relevant to the principal action. The displayed screen will contain information that will aid a user when viewing the notification.

Data Elements

The following data elements are specific to the View Notification screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Subject	A short summary of the purpose or content of the notification. Subject text is stored in supported locales; therefore, the text corresponding to the user's locale must be extracted and displayed.	String	No	No	No
Date Created & Category					

Date Created	The date and time the notification was created on the system.	Date Timestamp MM/DD/YYYY HH: MM	No	No	No
Category	The type or category of the notification.	String	No	No	No
Content					
Content	A short summary of the purpose or content of the notification.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Inactivate Notification

CI	Document Name
CI-67418 - DSD SC Inactivate Notification IMPLEMENTED	DSD_SC_Inactivate_Notification.doc

Depending upon which screen the Inactive action is taken from one of the following display. **Note:** Cúram OOTB processing requires a screen action verses a pop-up action when the Inactive Notification link is selected from the My Notification screen because multiple notifications may be inactivated.

When the Inactive Selected link is selected from the My Notifications screen with one or more notifications selected, the Inactive Notifications screen displays.

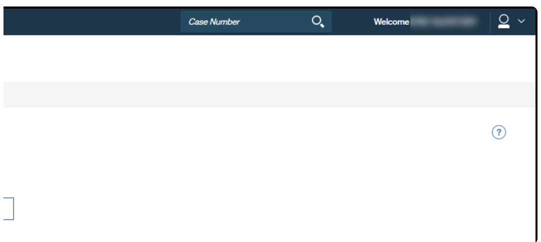


Figure – Inactive Notification

When the Inactivate action is selected from the View Notification screen, the Inactive Notification pop-up displays.

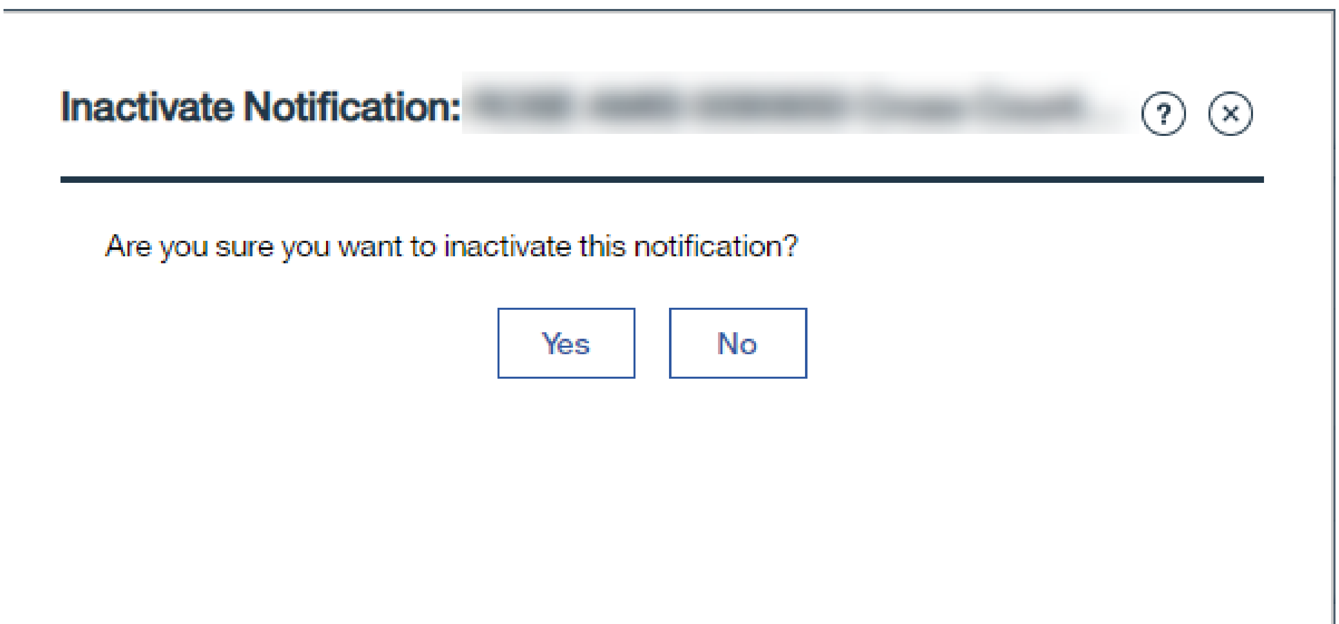


Figure – Inactivate Notification

Actions/Functions

The following action is associated with the Inactivate Notification screen or pop-up:

Actions	Function
Yes	Processes the Inactive Notification action and displays the screen of origin
No	Dismisses the action and displays the screen of origin

Data Elements

There are no data elements associated with the Inactivate Notification screen or pop-up.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Select a Supervisor

CI	Document Name
CI-67410 - DSD SC Select a Supervisor IMPLEMENTED	DSD_SC_Select_a_Supervisor.doc

When the Caseload by Users tab is selected from the top of the Cúram application the Caseload by User screen displays allowing a user to select a supervisor before proceeding to the Manage User Caseload screen. Only supervisors within the current user's county will be displayed.

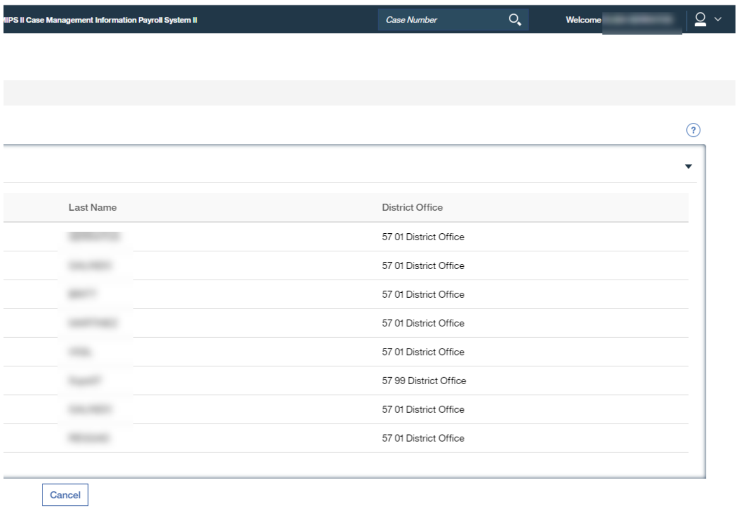


Figure – Select a Supervisor

Actions/Functions

The following actions are associated with the Select a Supervisor screen:

Actions	Function
Cancel	Cancels the action and navigates to My Workspace screen.
Supervisor List	
Select and Continue	Displays the Manage User Caseload screen

Data Elements

The following data elements are specific to the Select a Supervisor screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
First Name	The first name of the supervisor.	String	No	No	No
Last Name	The last name of the supervisor.	String	No	No	No
District Office	The district office associated with the supervisor.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Manage User Caseload

CI	Document Name
CI-67409 - DSD SC Manage User Caseload IMPLEMENTED	DSD_SC_Manage_User_Caseload.doc

When the Select a Supervisor link is selected on the Select a Supervisor screen the Manage User Caseload screen displays. The default display is a blank screen. When the user has selected a user from the "My Users" drop-down and then selected the Get Caseload link the first 500 cases assigned to a user display.

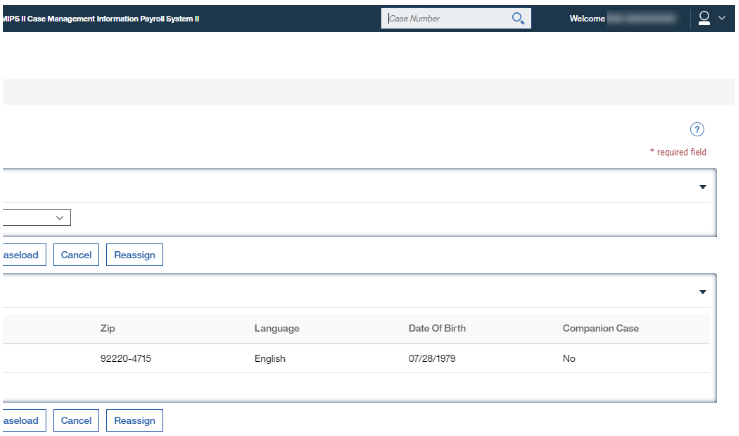


Figure – Manage User Caseload

Actions/Functions

The following actions are associated with the Manage User Caseload screen:

Actions	Function
<Select All Checkbox>	Allows the user to select all cases displayed in the Caseload section of the screen. If selected, use may un-select any cases which should not be included in reassignment.
Caseload	
Next>>	Displays the next group of case records (up to 500) assigned to the selected supervisor. This action is only displayed when there are additional case records for the selected supervisor. (This action will appear above and below the Caseload box).
<<Previous	Displays the previous 500 cases. This action is only displayed when there are previous case records for the selected supervisor. (This action will appear above and below the Caseload box).
<Case Number>	Displays the Case Home
Screen Actions	
Get Caseload	Displays up to the first 500 cases for the indicated user.
Cancel	Cancels the action and displays the Select a Supervisor screen
Reassign	Displays the "Reassign Cases To" screen.

Data Elements

The following data elements are specific to the Manage User Caseload screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Select a User					
My Users	A list of users with a direct reporting relationship to the supervisor. List displays in alphabetical order.	Drop-down List	Yes	No	Yes
Caseload					
Number of Items: XXX	Displays in the Caseload banner strip the number of cases current assigned to the user	String	No	No	No
<Select Checkbox>	Allows the user to individually select cases for reassignment.	Checkbox	No	No	Yes
Recipient	The name of the Recipient (First Name Last Name	String	No	No	No
Status	The status of the Recipient case.	String	No	No	No
City	Recipient City of residence	String	No	No	No
Zip	Recipient Zip Code of residence	String	No	No	No
Language	Recipient primary language	String	No	No	No
Date Of Birth	The birth date of the Recipient	Date MM/DD /YYYY	No	No	No
Companion Case	Indicator if the case has an associated "companion" case	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Reassign Cases To

CI	Document Name
CI-67463 - DSD SC Reassign Cases To IMPLEMENTED	DSD_SC_Reassign_Cases_To.doc

When the Reassign link is selected on the Caseload screen the Reassign Cases To screen displays allowing the user to transfer the previously selected cases to another user. The new owner may be a case worker within a separate district office within the county. The case will be transfer to the new owner and will then be associated with the new case owner's district office.

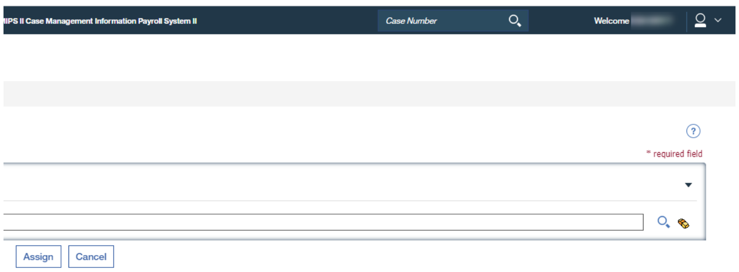


Figure – Reassign Cases To

Actions/Functions

The following actions are associated with the Reassign Cases To screen:

Actions	Function
Assign	Assigns the previously selected cases to the indicated New Owner.
Cancel	Cancels the action and returns the user to the default, blank, Caseload by Users screen.
Details	
New Owner	Displays the User Search screen.

Data Elements

There are no data elements specific to the Reassign Cases To screen.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/User Home Screen

CI	Document Name
CI-67457 - DSD SC User Home Screen IMPLEMENTED	DSD_SC_User_Home_Screen.doc

When the View link for a specific Search Results cluster on the User Search screen is selected the User Home screen displays allowing a user to view another user's information.
Role Name: COUNTYSECURITYADMINROLE

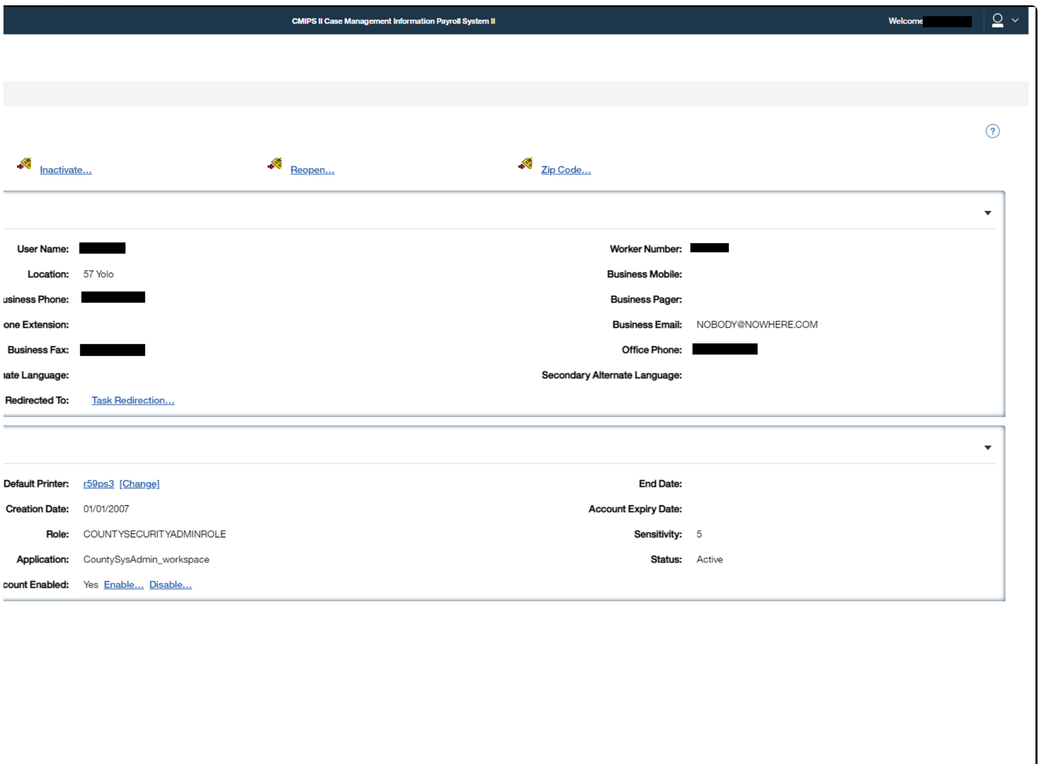


Figure – User Home

Actions/Functions

The following actions are associated with the User Home screen:

Actions	Function
User Home Action – These actions display to CountySystem Administrator users only	
Edit	Click Edit to modify the information displayed.
Inactivate	Click Inactivate to inactivate this user and this user's status becomes Cancelled.
Reopen	Click Reopen to reopen the user's account.
Zip Code	Click ZIP Code to open the User List Create Zip Code screen.
Contact Details	
Tasks Currently Redirected To	Provides a hyperlink 'Task Redirection...' that when selected displays the Task Redirection pop-up.
Further Details – This section display to County System Administrator users only	

<Default Printer>	Click the <default printer> to view the printer resource. Click [change] to update the user's default printer.
[Change]	Click [Change] to change the default printer for the user.
Enable	Click Enable to enable the user's account.
Disable	Click Disable to disable the user's account.

Data Elements

The following data elements are specific to the User Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Contact Details					
User Name	System username, e.g., JSmith001.	String	No	No	No
Worker Number	Four character value to identify the social worker or Supervisor (unit).	String	No	No	No
Location	User's organization location.	String	No	No	No
Business Mobile	User's business mobile number including area code.	Number	No	No	No
Business Phone	User's business phone number including area code.	Number	No	No	No
Business Pager	User's business pager number including area code.	Number	No	No	No
Business Phone Extension	User's phone number extension.	Number	No	No	No
Business Email	User's business email address.	String	No	No	No
Business Fax	User's business fax machine number.	Number	No	No	No
Office Phone	County or district office's main phone number.	Number	No	No	No
Primary Alternate Language	User's primary alternate language.	String	No	No	No
Secondary Alternate Language	User's secondary alternate language.	String	No	No	No
Further Details – Only to be viewed by the County System Administrator					
Creation Date	Date on which the user is created on the system.	Date MM/DD/YYYY	No	No	No
End Date	Displays the end date entered on the Close User screen.	Date MM/DD/YYYY	No	No	No
Account Expiry Date	Date on which the user's account expires.	Date MM/DD/YYYY	No	No	No
Role	This is the user's security role.	String	No	No	No
Sensitivity	User's sensitivity level. This sensitivity indicates a user's data-based security access level. Each user, participant, work queue, and note on the system is assigned a sensitivity level. In order for a user to have access to specific user, participant, or note fields, that user must have a sensitivity level equal to or higher than the sensitivity level of the participant, user, or note. For example if a user with a sensitivity level of 3 wanted to modify another user's email address, the other user's sensitivity level must be equal to or less than 3. Work queue sensitivity indicates whether a user can add him or herself to a work queue. In order for a user to add himself or herself to a work queue, that user must have a sensitivity level equal to or higher than sensitivity level of the work queue.	Number	No	No	No
Application	A user's application identity designates the area of Cúram the user accesses when logging into the system.	String	No	No	No

Account Enabled	This field indicates whether the user's account is enabled.	String	No	No	No
Status	The status is active, unless the record has been inactivated, in which case, the status is canceled.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Modify User

CI	Document Name
CI-67047 - DSD SC Modify User IMPLEMENTED	DSD_SC_Modify_User.doc

When the Edit link is selected from the User Home screen the Modify User pop-up displays allowing a user to modify the details of a user's account.

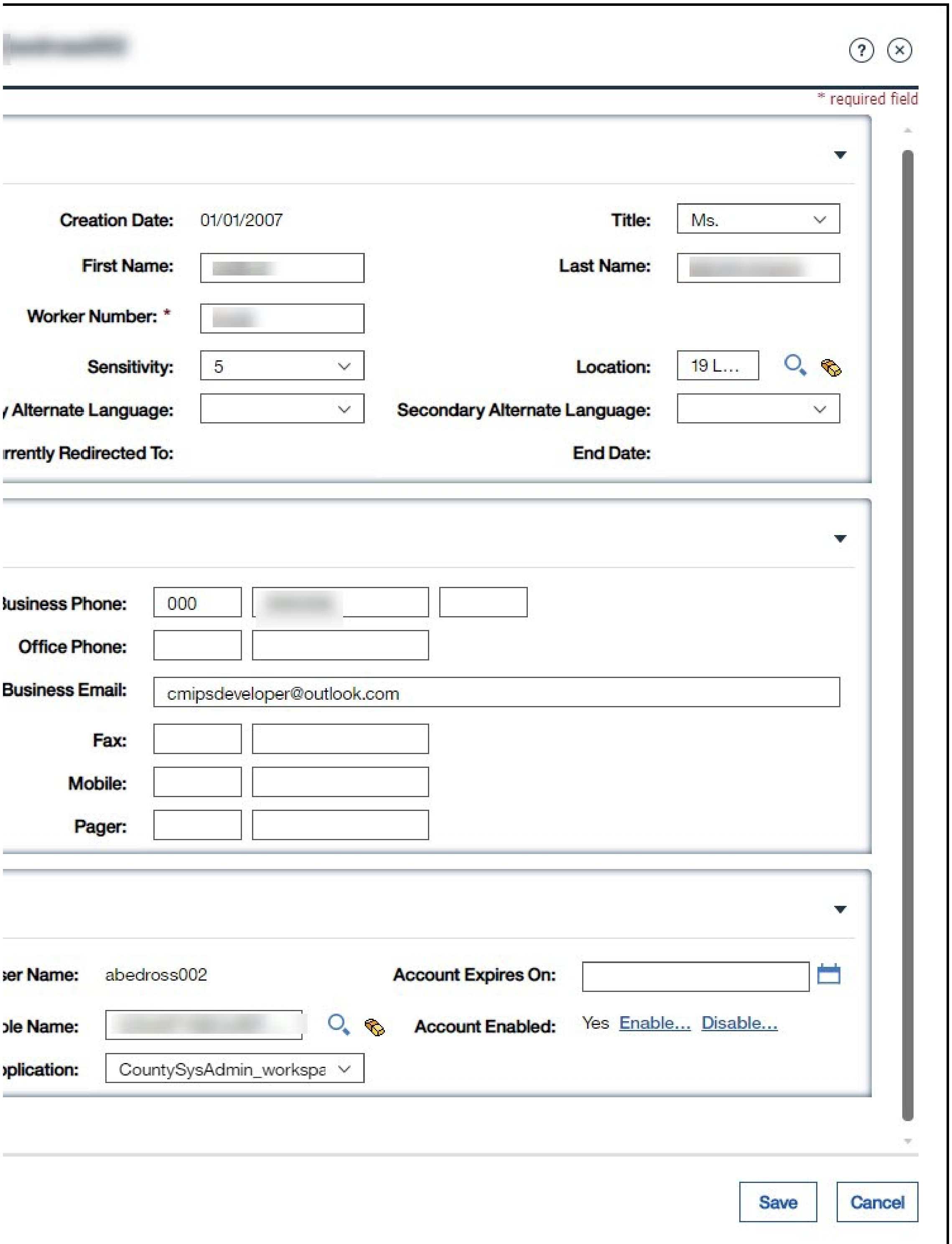


Figure – Modify User

Actions/Functions

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

Actions	Function
Details	

Location <Search>	Displays the user's location. Selecting the <location search> allows a user to update the user's location. A user's location determines their ability to modify organization details based on a comparison between the user's location and the location assigned to the organization component the user wishes to modify.
Security	
Role Name <Search>	Displays a list of Security Roles available in the County. Click the <role search> to update the user's security role.
Enable	Select Enable to enable the user's account.
Disable	Select Disable to disable the user's account.
Screen Actions	
Save	Saves the updates to the screen and displays the User Home screen.
Cancel	Cancels the action and displays the User Home screen.

Data Elements

The following data elements are specific to the Modify User pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Creation Date	Date the user is entered into the system. This date cannot be modified.	Date MM/DD /YYYY	No	No	No
Title	The title of the user.	Drop-down List	No	No	Yes
First Name	User's first name. Unless modified, this field will reflect the first name entered via the Web Portal on the Create User screen in all uppercase letters.	String	Yes	No	Yes
Last Name	User's last name. Unless modified, this field will reflect the last name entered via the Web Portal on the Create User screen in all uppercase letters.	String	Yes	No	Yes
Worker Number	Four-character value to identify the social worker or supervisor (unit.)	String	Yes	No	Yes
Sensitivity	User sensitivity level from the drop-down list of number values. This sensitivity indicates a user's data based security access. Each user, participant, work queue, and note on the system is assigned a sensitivity level. In order for a user to have access to specific user, participant, or note fields, that user must have a sensitivity level equal to or higher than the sensitivity level of the participant, user, or note. For example if a user with a sensitivity level of 3 wanted to modify another user's email address, the other user's sensitivity level must be equal to or less than 3. Work queue sensitivity indicates whether or not a user can add him or herself to a work queue. In order for a user to add himself or herself to a work queue, that user must have a sensitivity level equal to or higher than sensitivity level of the work queue.	Drop-down List	Yes	No	No
Primary Alternate Language	User's primary alternate language.	Drop-down List	No	No	Yes
Secondary Alternate Language	User's secondary alternate language.	Drop-down List	No	No	Yes
Tasks Currently Redirected To	User who is responsible for the user's tasks if the user is unavailable. This field is blank if there is not any current redirection.	String	No	No	No
End Date	Displays the end date entered on the Close User screen. This is a read only field.	Date MM/DD /YYYY	No	No	No
Contact					
Business Phone	User's business phone number (area code, phone and extension).	Number	No	No	Yes
Office Phone	User's main office phone number (area code and phone).	Number	No	No	Yes
Business Email	User's business email address.	String	No	No	Yes

Fax	User's fax number (area code and phone).	Number	No	No	Yes
Mobile	User's mobile phone number (area code and phone).	Number	No	No	Yes
Pager	User's pager number (area code and phone).	Number	No	No	Yes
Security					
User Name	User's login name cannot be modified. The user enters this login name to access the system.	String	No	No	No
Account Expires On	Date on which the user's account expires.	Date MM/DD /YYYY	No	No	Yes
Account Enabled	This field indicates whether or not the user's account is enabled.	String	No	No	Yes
Application	User's application identity from the drop-down list of application identities. A user's application identity designates the area of Cúram the user accesses when logging into the system.	Drop-down List	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/User Zip Codes

CI
CI-67456 - DSD SC User Zip Codes IMPLEMENTED

The User Zip Codes pop-up displays when the Zip Code link from the User Home screen allowing the user to manage the Zip Codes associated with the user.

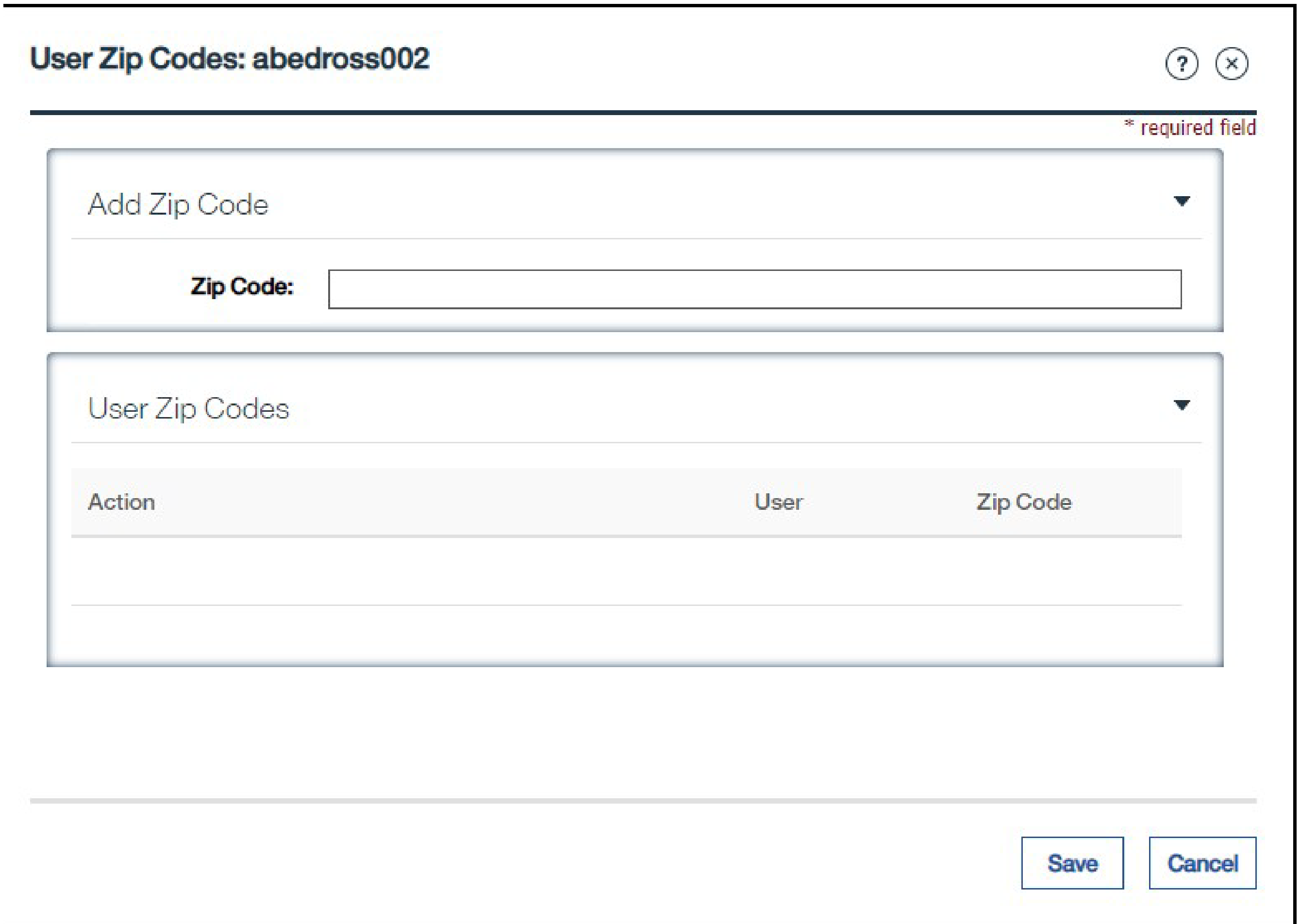


Figure – User Zip Codes

Actions/Functions

The following actions are associated with the User Zip Codes pop-up:

Actions	Function
Save	Adds the indicated Zip Code to the user and displays on the User Zip Codes list.
Cancel	Closes this screen and navigates to the User Home screen.
User Zip Codes	
Remove	Displays the Delete Zip Code confirmation screen.

Data Elements

The following data elements are specific to the User Zip Codes pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Add Zip Code					
Zip Code	Zip Code. This is a five-digit numeric zip code.	String	No	No	Yes
User Zip Codes					
User	Name of the user who is associated with this list of zip codes.	String	No	No	No
Zip Code	Zip codes associated with this user.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Task Redirection

CI	Document Name
CI-67407 - DSD SC Task Redirection IMPLEMENTED	DSD_SC_Task_Redirection.doc

When the Task Redirection link is selected from the Contact Details cluster of the User Home, the Task Redirection pop-up displays allowing the user to view and if needed Clear existing Task Redirections or to add a new Task Redirection.

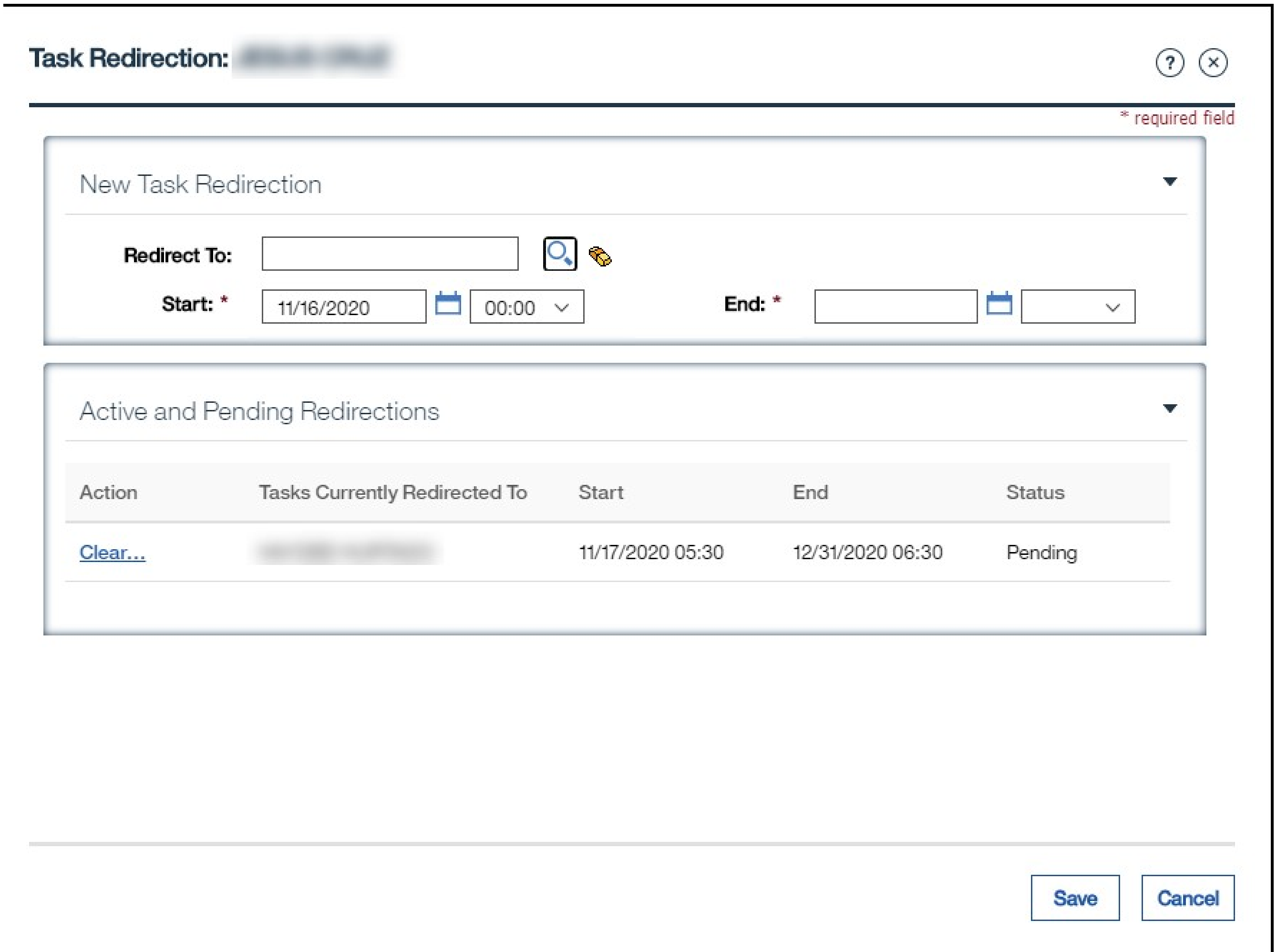


Figure – Task Redirection

Actions/Functions

The following actions are associated with the Task Redirection pop-up:

Actions	Function
New Task Redirection	
Redirect To	Displays the User Search screen.
Active and Pending Redirections	
Clear	Displays the Clear Confirmation pop-up

Screen Actions	
Save	Saves the entered data and displays the User Home screen.
Cancel	Cancels the action and displays the User Home screen.

Data Elements

The following data elements are specific to the Task Redirection pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
New Task Redirection					
Start	The date and time when the task redirection begins.	Date Timestamp	Yes	Today's date	Yes
End	The date and time when the task redirection ends.	Date Timestamp MM/DD /YYYY HH:MM	Yes	No	Yes
Active and Pending Redirections					
Tasks Currently Redirected To	Name of the user to which active or pending tasks are currently being redirected.	String	No	No	No
Start	Start date of the task redirection.	Date MM/DD/YYYY HH:MM	No	No	No
End	End date of the task redirection.	Date MM/DD/YYYY HH:MM	No	No	No
Status	The current status of this task redirection, which is either "Active" or "Pending".	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Organization Unit Home

CI	Document Name
CI-67430 - DSD SC Organization Unit Home IMPLEMENTED	DSD_SC_Organization_Unit_Home.doc

The County System Administrator accesses their Organization Unit Home by selecting the Organization tab from the Expanded Shortcut Panel and then select the Home link in the expanded Organization Shortcut panel to display the Organization Home screen displays. Select the View link associated with the counties Organization Unit and the Organization Unit Home displays. For easier navigation the Shortcuts Panel may be collapsed.

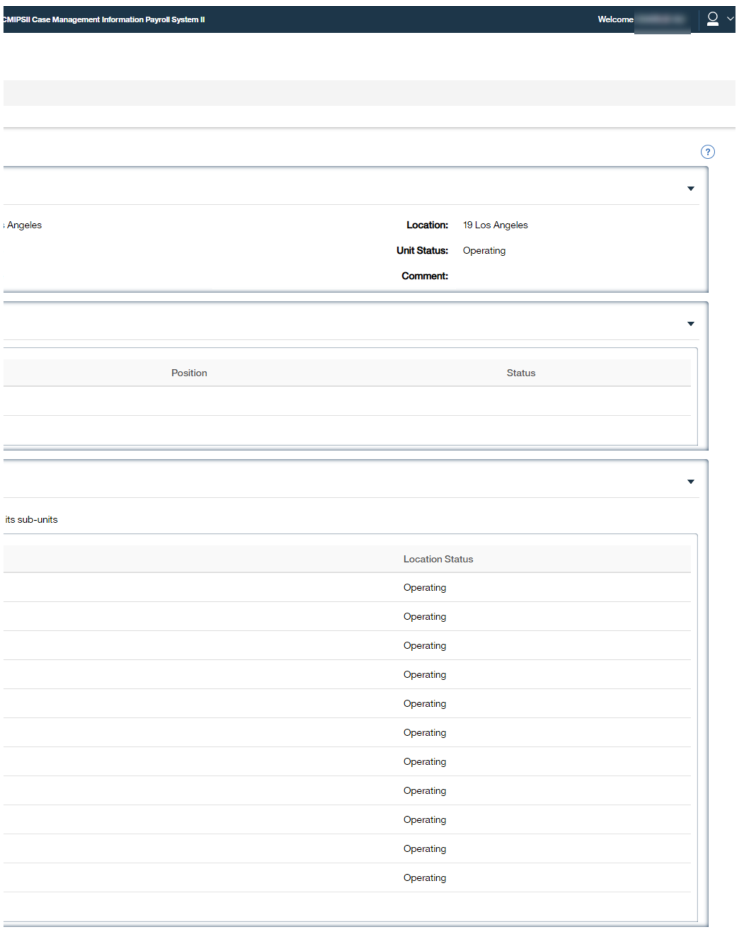


Figure – Organization Unit Home

Actions/Functions

The following actions are associated with the Organization Unit Home screen:

Actions	Function
<Name>	Displays the user home screen for the lead user.

Data Elements

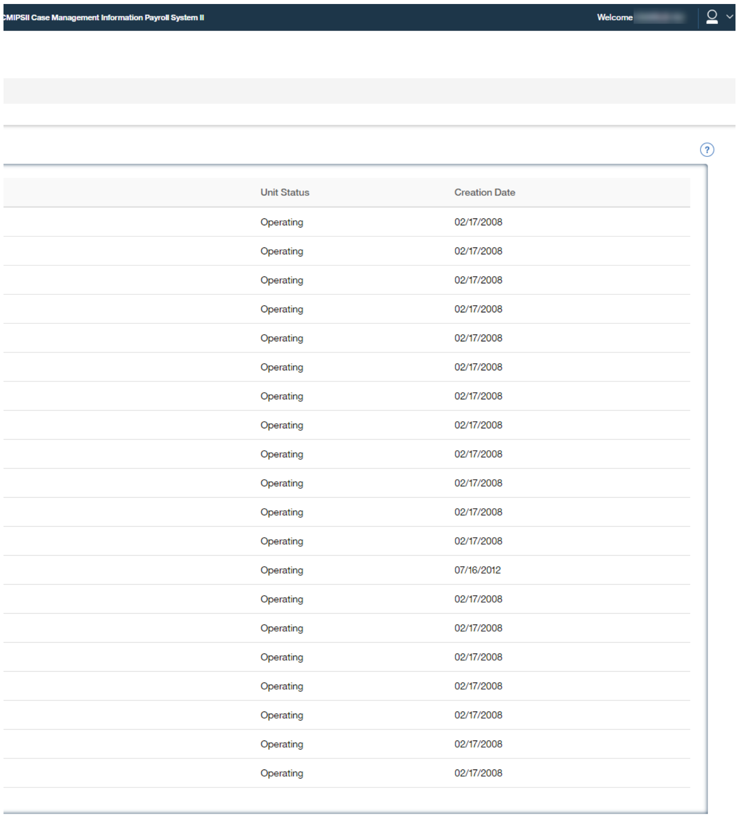
The following data elements are specific to the Organization Unit Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Name	Organization unit name	String	No	No	No
Parent Unit	Name of parent unit for the current organization.	String	No	No	No
Status	The status is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No
Location	Location associated with the organization unit.	String	No	No	No
Unit Status	Organization unit status. An organization unit can either have an "operating" or "closed" status.	String	No	No	No
Comment	General comment for Organization unit.	String	No	No	No
Lead Users					
Position	Position of the lead user.	String	No	No	No
Status	The status of the position is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No
Location Details					
Location Name	The name of the location which has been assigned to a position within the organization unit or one of its sub units.	String	No	No	No
Location Status	The status of the location which has been assigned to a position within the organization unit or one of its sub units.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Organization Units

CI	Document Name
CI-67412 - DSD SC Organization Units IMPLEMENTED	DSD_SC_Organization_Units.doc

The Organization Unit display when the user selects the Child Organization Units Page Navigation tab. This screen allows the County System Administrator to view a list of the organization units in their county.



Unit Status	Creation Date
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	07/16/2012
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008
Operating	02/17/2008

Figure – Organization Units

Actions/Functions

The following actions are associated with the Organization Units screen:

Actions	Function
View	Displays the Organization Unit Home screen.

Data Elements

The following data elements are specific to the Organization Units screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	Organization unit name.	String	No	No	No
Unit Status	Organization unit status. An organization unit can either have an "operating" or "closed" status.	String	No	No	No

Creation Date	Organization unit creation date	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Positions

CI	Document Name
CI-67056 - DSD SC Positions IMPLEMENTED	DSD_SC_Positions.doc

When the user selects the Positions tab from the Organization Unit Home Page Navigation Bar the Positions screen displays. This screen allows the County System Administrator to view a list of the positions for an organization unit within their county.

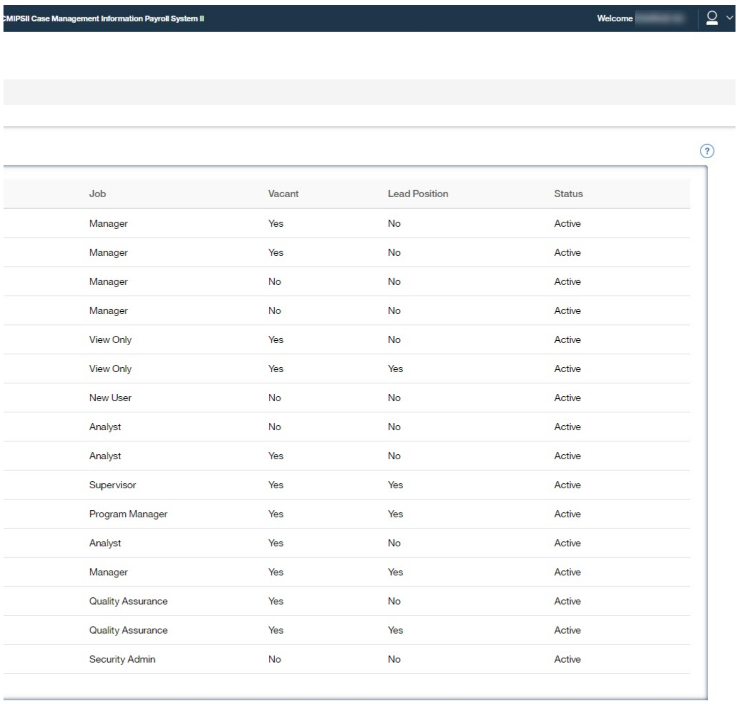


Figure – Positions

Actions/Functions

The following actions are associated with the Positions screen:

Actions	Function
View	Displays the Position Home screen.

Data Elements

The following data elements are specific to the Positions screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Position	Name of the position.	String	No	No	No
Job	Job for the given position.	String	No	No	No
Vacant	Indicator if position is vacant (Yes/No).	String	No	No	No
Lead Position	Indicator if position is a lead position (Yes/No).	String	No	No	No

Status	The status is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Position Home

CI	Document Name
CI-67050 - DSD SC Position Home IMPLEMENTED	DSD_SC_Position_Home.doc

When the user selects the View link associated specific Position displayed on the Positions screen the Position Home screen displays. Notice that the Navigation Bar has also changed. This screen allows the County System Administrator to display information associated with a position in their county.

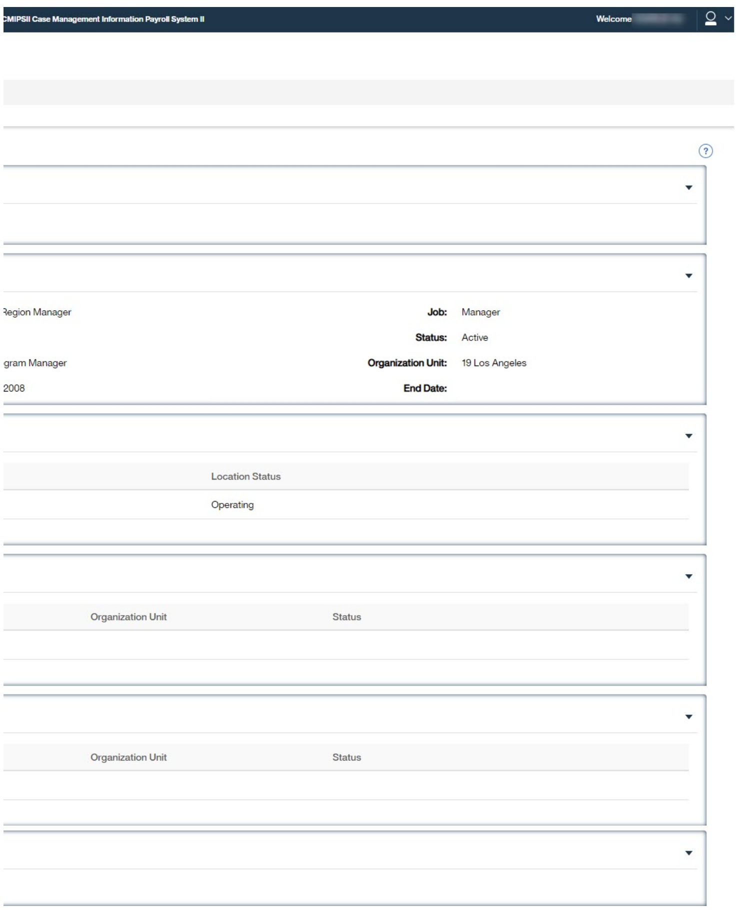


Figure – Position Home

Actions/Functions

The following actions are associated with the Position Home screen:

Actions	Function
Options	
Assign User	Displays the Assign User pop-up.
Supervisor Users	
<Name>	Displays the User Home screen for the Supervisor.
<Organization Unit>	Displays the Organization Unit Home screen.
Subordinate Users	

<Name>	Displays the User Home screen for the Subordinate User.
<Organization Unit>	Displays the Organization Unit Home screen.

Data Elements

The following data elements are specific to the Position Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Name	Position name.	String	No	No	No
Lead Position	This field indicates whether or not the position is a lead position. Indicator is Yes or No.	String	No	No	No
Reports To	The name of the position this position reports to.	String	No	No	No
Start Date	Start date of the period during which the position details are valid.	Date MM/DD /YYYY	No	No	No
Job	Name of job assigned to the position.	String	No	No	No
Status	The status is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No
Organizatio n Unit	Name of the organization unit the position is assigned to.	String	No	No	No
End Date	End date of the period until which the position details are valid.	Date MM/DD /YYYY	No	No	No
Location Details					
Location Name	The name of the location to which the position is linked.	String	No	No	No
Location Status	The status of the location to which the position is linked.	String	No	No	No
Supervisor Users					
Status	The status of the Supervisor User. The status is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No
Subordinate User					
Status	The status of the Subordinate User. The status is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No
Comments					
Comments	Comments related to this position.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Users from Organization Unit Home

CI
CI-67461 - DSD SC Users from Organization Unit Home IMPLEMENTED

When the user selects the Users tab from the Organization Unit Home Page Navigation Bar, the Users from Organization Unit Home screen displays. This screen allows the County System Administrator to view a list of all users within a position or organization unit within the county.

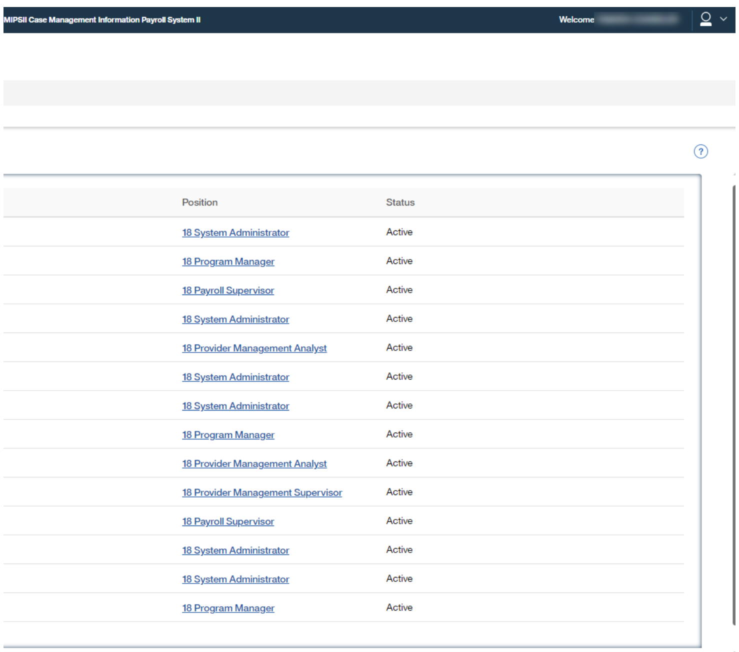


Figure – Users from Organization Unit Home

Actions/Functions

The following actions are associated with the Users from Organization Unit Home screen:

Actions	Function
View	Displays the User Home screen.
Edit	Opens the Modify User screen.
<Position>	Displays the Position Home screen.

Data Elements

The following data elements are specific to the Users from Organization Unit Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	Name of the user. (First Name Last Name)	String	No	No	No
Status	User status. The status is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Assign User

CI	Document Name
CI-67067 - DSD SC Assign User IMPLEMENTED	DSD_SC_Assign_User.doc

When the Assign User link, in the Options cluster, is selected on the Position Home screen the Assign User pop-up displays allowing the County System Administrator to assign a user to a position within the county.

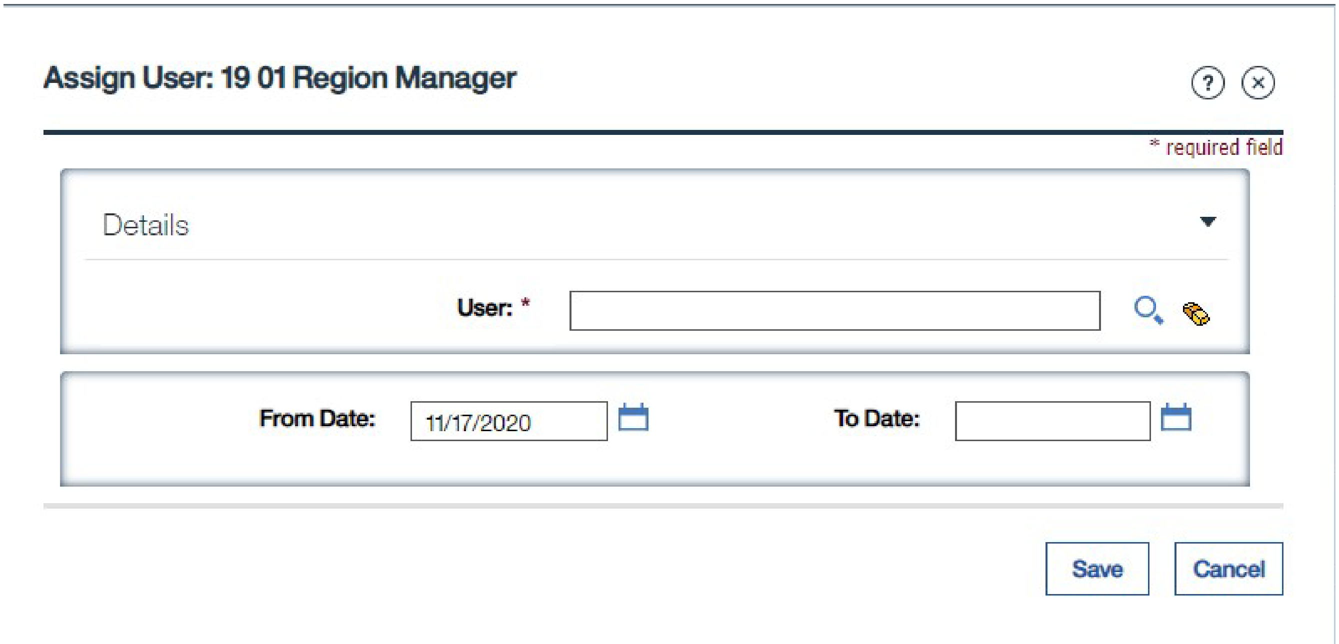


Figure – Assign User

Actions/Functions

The following actions are associated with the Assign User pop-up:

Actions	Function
Save	Saves the assigned user to the position and displays the Position Home screen.
Cancel	Cancels the action and displays the Position Home screen.
Details	
User	Displays the User Search screen.

Data Elements

The following data elements are specific to the Assign User pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
From Date	Date from which the user is assigned to a position.	Date MM/DD/YYYY	Yes	No	Yes
To Date	Date to which the user is assigned to a position.	Date MM/DD/YYYY	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Users from Position Home

CI
CI-116600 - DSD SC Users from Position Home IMPLEMENTED

When the Users tab is selected from the Position Home Page Navigation Bar the Users from Position Home screen displays. This screen allows the County System Administrator to remove a user from a position within his or her county.

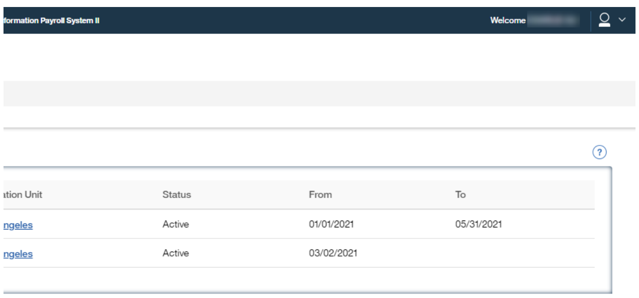


Figure – Users from Position Home

Actions/Functions

The following actions are associated with the Users from Position Home screen:

Actions	Function
Remove	Display the Remove User Confirmation screen
Organization Unit	Displays the Organization Unit Home screen.

Data Elements

The following data elements are specific to the Users from Position Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	Name of the user. (First Name Last Name)	String	No	No	No
Status	User status. The status is "active", unless the record has been deleted, in which case, the status is "canceled".	String	No	No	No
From	The date on which "From" the record was first added	Date MM/DD /YYYY	No	No	No
To	The date on which "To" the record was first added	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Work Queues

CI	Document Name
CI-67074 - DSD SC Work Queues IMPLEMENTED	DSD_SC_Work_Queues.doc

When a County System Administrator selects the Work Queues tab from the expanded Shortcuts panel and then selects the Home link on the Work Queues Shortcut panel the Work Queues screen displays the list of all Work Queues associated with their county.

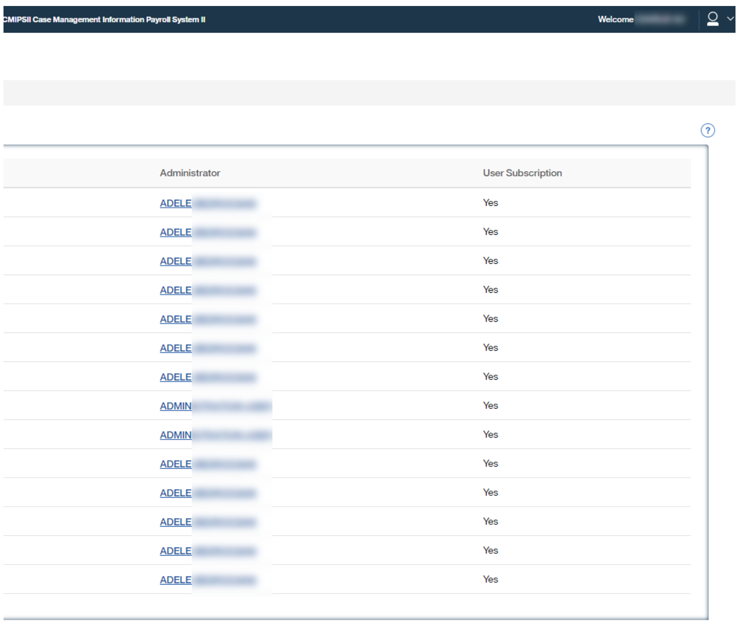


Figure – Work Queues

Actions/Functions

The following actions are associated with the Work Queues screen:

Actions	Function
View	Displays the View Work Queue screen.
<Administrator>	Displays the User Home screen for the Administrator.

Data Elements

The following data elements are specific to the Work Queues screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	Name of the work queue.	String	No	No	No
User Subscription	This field indicates whether or not a user can subscribe himself/herself to the listed work queue.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/View Work Queue

CI	Document Name
CI-67064 - DSD SC View Work Queue IMPLEMENTED	DSD_SC_View_Work_Queue.doc

When the View link associated with a Work Queue listed on the Work Queues screen, the View Work Queue screen displays allowing the user to see the details associated with the selected Work Queue.

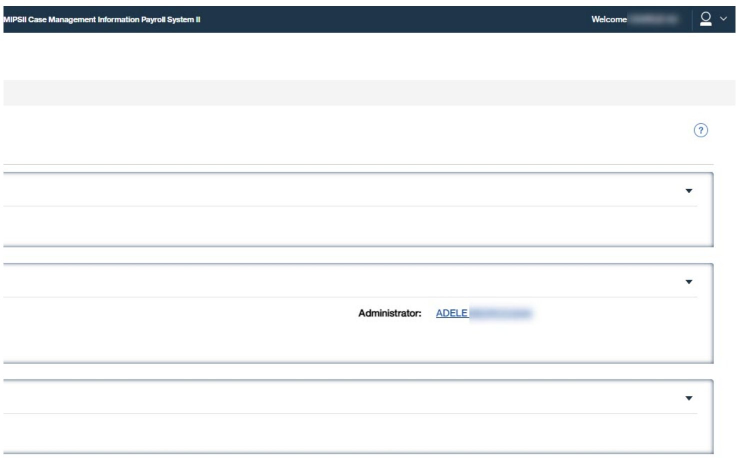


Figure – View Work Queue

Actions/Functions

The following actions are associated with the View Work Queue screen:

Actions	Function
Content Tab	
Work Queue Subscription Screen	Displays the Work Queue Subscriptions screen.
Subscription	
<Administrator>	Displays the User Home screen for the work queue administrator.

Data Elements

The following data elements are specific to the View Work Queue screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Name	Name of the work queue.	String	No	No	No
Subscription					
User Subscription Allowed	This field indicates whether or not a user can subscribe himself/herself to the work queue.	String	No	No	No
Sensitivity	Indicates the sensitivity level associated with this work queue.	String	No	No	No
Comments					
Comments	Comments related to this work queue.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Work Queue Subscriptions

CI	Document Name
CI-67058 - DSD SC Work Queue Subscriptions IMPLEMENTED	DSD_SC_Work_Queue_Subscriptions.doc

When the Work Queue Subscriptions Content Tab is selected on the View Work Queue screen the Work Queue Subscriptions screen displays and allows the user to either subscribe a new user to the Work Queue or to Remove a user already subscribed to the Work Queue.

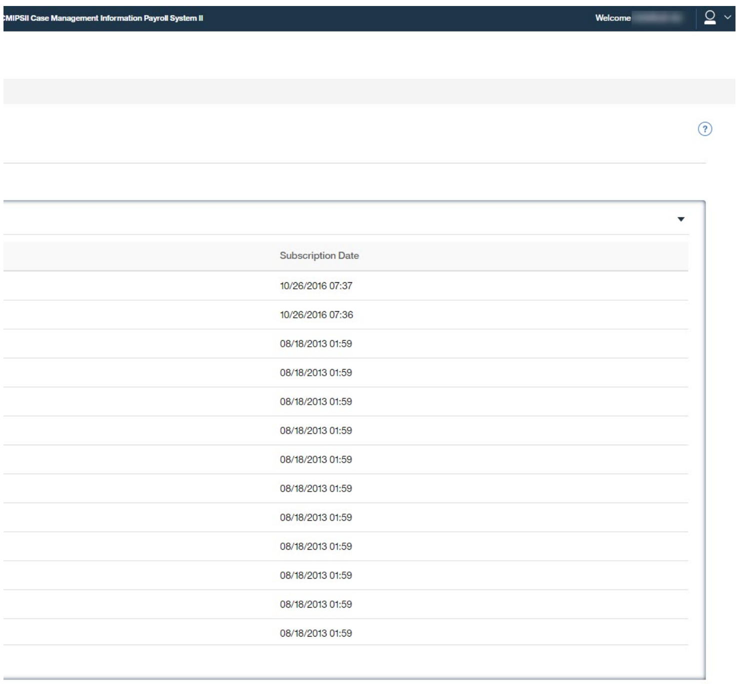


Figure – Work Queue Subscriptions

Actions/Functions

The following actions are associated with the Work Queue Subscriptions screen:

Actions	Function
Content Tab	
View Work Queue	This link allows a user to view work queue details.
Screen Body	
New	Select New to create a new work queue subscription.
User Subscriber	
Remove	Select Remove on the appropriate list row to remove a user from the work queue subscription.
<Name>	Select <Name> to display the User Home screen.

Data Elements

The following data elements are specific to the Work Queue Subscriptions screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Subscription Date	Date of subscription to work queue.	Date MM/DD/YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Add Work Queue Subscription

CI	Document Name
CI-67063 - DSD SC Add Work Queue Subscription IMPLEMENTED	DSD_SC_Add_Work_Queue_Subscription.doc

When the New link is selected on the Work Queue Subscriptions screen, for a specific work queue, the Add Work Queue Subscription pop-up displays allowing the user to locate and subscribe a new user to the Work Queue.

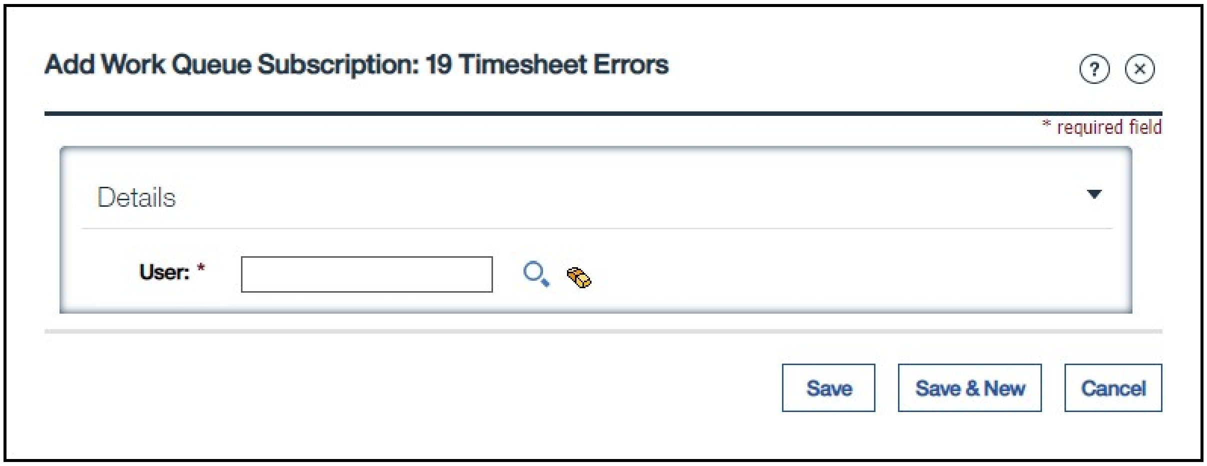


Figure – Add Work Queue Subscription

Actions/Functions

The following actions are associated with the Add Work Queue Subscription pop-up:

Actions	Function
Save	Saves the User to the Work Queue and displays the Work Queue Subscription screen with the new user listed.
Save & New	Saves the User to the Work Queue and displays a blank Add Work Queue Subscription screen.
Cancel	Cancels the action and displays Work Queue Subscriptions screen.
Details	
User (search field)	Displays the User Search screen.

Data Elements

There are no data elements specific to the Add Work Queue Subscription pop-up.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/County Contractor Rate

CI	Document Name
CI-67450 - DSD SC County Contractor Rate IMPLEMENTED	DSD_SC_County_Contractor_Rate.doc

When the user selects the Wage Rate tab from the expanded Shortcuts panel and then selects the County Contractor Rate link the County Contractor Rate screen displays as a new Content Tab. After the user enters a County Name and selects the Get County Contractor Rates action, the rates associated with that county's County Contractors displays.

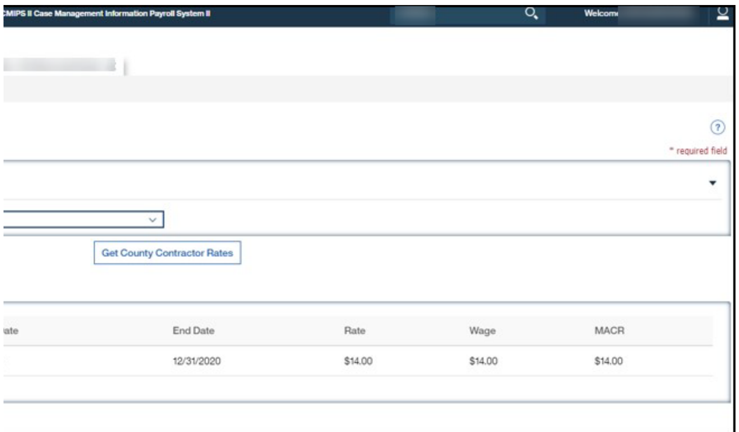


Figure – County Contractor Rate

Actions/Functions

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

Actions	Function
Get County Contractor Rates	County contractor rates will be displayed on the same screen for the selected county.
New	Displays the Create County Contractor Rate screen.
County Contractor List	
View	Displays the View County Contractor Rate screen.
Edit	Displays the Modify County Contractor Rate screen.

Data Elements

The following data elements are specific to the County Contractor Rate screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Contractor Name	The Name of the County Contractor	String	No	No	No
Effective Date	Effective Date of Contract.	Date MM/DD /YYYY	No	No	No
End Date	End date of Contract.	Date MM/DD /YYYY	No	No	No
Rate	Rate is the loaded rate of pay per hour which may include taxes and benefits.	Decimal	No	No	No
Wage	Wage is the amount paid directly to the Provider.	Decimal	No	No	No

MACR	Maximum Allowable Contract Rate (MACR).	Decimal	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Create County Contractor Rate

CI	Document Name
CI-67452 - DSD SC Create County Contract Rate IMPLEMENTED	DSD_SC_Create_County_Contract_Rate.doc

When the New link is selected on the County Contractor Rate screen, after a county has been selected, the Create County Contractor Rate screen displays for that county allowing a user to create a new County Contract Rate.

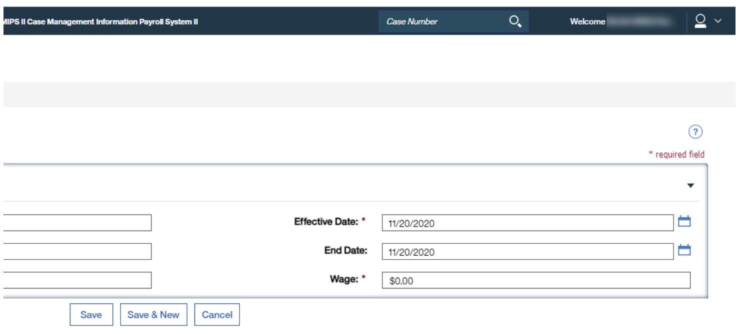


Figure – Create County Contractor Rate

Actions/Functions

The following actions are associated with the Create County Contractor Rate screen:

Actions	Function
Save	Saves data entered and County Contractor Rate screen.
Save & New	Saves data entered and allows user to add another county rate.
Cancel	Cancels the action and displays the County Contractor Rate screen.

Data Elements

The following data elements are specific to the Create County Contractor Rate screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Contractor Name	Name of the contractor.	String	Yes	No	Yes
Effective Date	Effective date of contract.	Date MM/DD/YYYY	Yes	No	Yes
Rate	Rate is the "loaded" rate of pay per hour.	Decimal	Yes	$0.00	Yes
End Date	End date of contract.	Date MM/DD/YYYY	No	No	Yes
MACR	Maximum Allowable Contract Rate (MACR).	Decimal	Yes	$0.00	Yes
Wage	Wage is the amount paid directly to the Provider.	Decimal	Yes	$0.00	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/View County Contractor Rate

CI	Document Name
CI-67399 - DSD SC View County Contractor Rate IMPLEMENTED	DSD_SC_View_County_Contractor_Rate.doc

When the View link is selected from the County Contractor Rate screen, for a particular county, the View County Contractor Rate screen displays the information for the selected record.

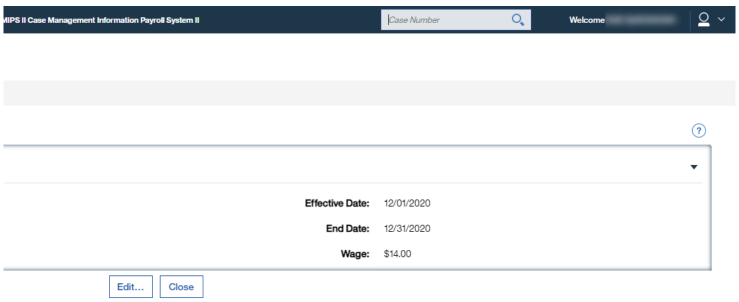


Figure – View County Contractor Rate

Actions/Functions

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

Actions	Function
Edit	Displays the Modify County Contractor Rate screen.
Close	Cancels the action and displays the County Contractor Rate screen.

Data Elements

The following data elements are specific to the View County Contractor Rate screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Contractor Name	Name of the contractor.	String	No	No	No
Effective Date	Effective date of contract.	Date MM/DD/YYYY	No	No	No
Rate	Rate is the loaded rate of pay per hour.	Decimal	No	No	No
End Date	End date of contract.	Date MM/DD/YYYY	No	No	No
MACR	Maximum Allowable Contract Rate (MACR).	Decimal	No	No	No
Wage	Wage is the amount paid directly to the Provider.	Decimal	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Modify County Contractor Rate

CI	Document Name
CI-67464 - DSD SC Modify County Contractor Rate IMPLEMENTED	DSD_SC_Modify_County_Contractor_Rate.doc

When the Edit link is selected from the County Contractor Rate screen for a specific county or the Edit link is selected from the View County Contractor Rate screen the Modify County Contractor Rate pop-up displays allowing the user to modify information associated with the County Contractor Rate.

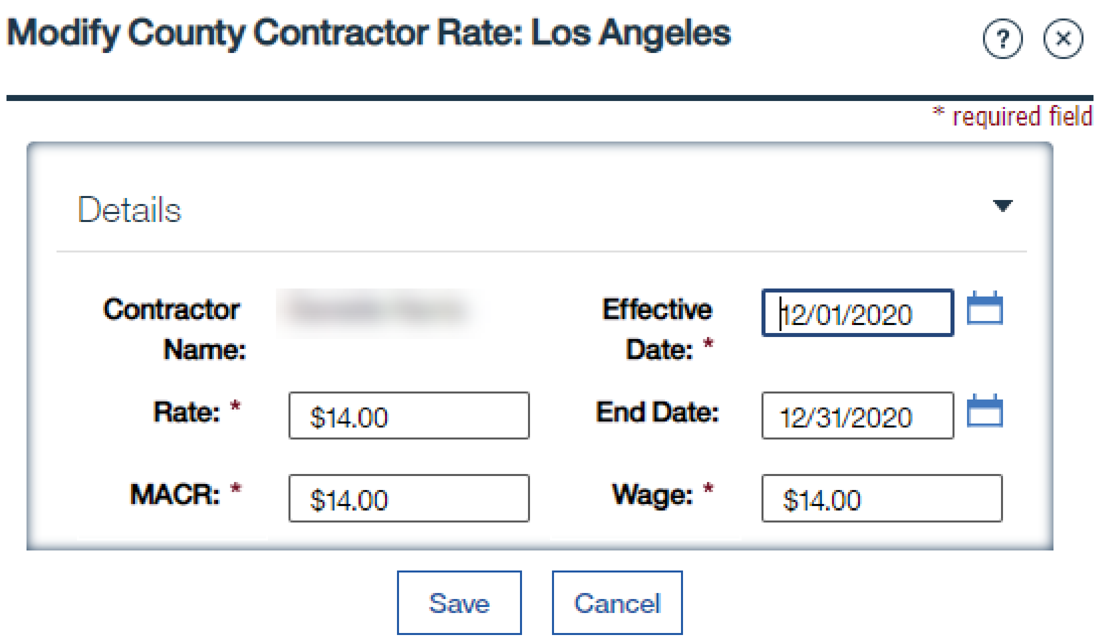


Figure – Modify County Contractor Rate

Actions/Functions

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

Actions	Function
Save	Saves data displays the Create County Contractor screen.
Cancel	Cancels the action and displays the County Contractor Rate screen.

Data Elements

The following data elements are specific to the Modify County Contractor Rate pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Contractor Name	Name of the contractor	String	No	No	No
Effective Date	Effective Date of Contract	Date MM/DD/YYYY	Yes	No	Yes

Rate	Rate is the "loaded" rate of pay per hour	Decimal	Yes	No	Yes
End Date	End Date of the Contract	Date MM/DD/YYYY	No	No	Yes
MACR	MACR is the maximum allowable county rate.	Decimal	Yes	No	Yes
Wage	Wage is the amount paid directly to the Provider	Decimal	Yes	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Public Authority Wage Rate

CI	Document Name
CI-67425 - DSD SC Public Authority Wage Rate IMPLEMENTED	DSD_SC_Public_Authority_Wage_Rate.doc

When the Public Authority Wage Rate link is selected from the expanded Wage Rate Shortcut panel the Public Authority Wage Rate screen is displayed. When the user has indicated a County and selected the "Get Public Authority Wage Rates" action, a list of wage rates associated with the indicated county displays.

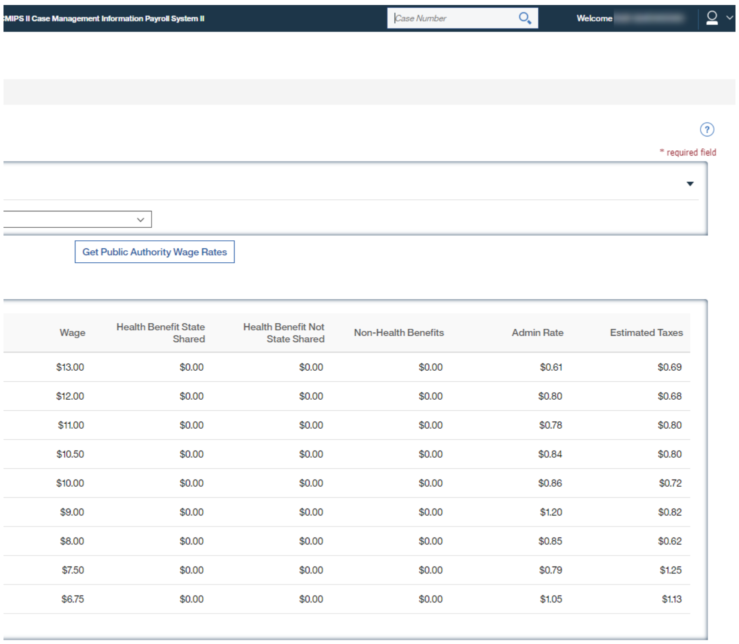


Figure – Public Authority Wage Rate

Actions/Functions

The following actions are associated with the Public Authority Wage Rate screen:

Actions	Function
Get Public Authority Wage Rates	Displays the list of wage rates associated with the selected county.
New	Displays the Create Wage Rate screen
Public Authority Wage Rate List	
View	Displays the View Public Authority Wage Rate screen.
Edit	Displays the Modify Public Authority Wage Rate screen.

Data Elements

The following data elements are specific to the Public Authority Wage Rate screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Select County					
County	County Name	Drop-down List	Yes	No	Yes

Public Authority Wage Rate List					
Effective Date	Effective Date of Contract	Date MM/DD/YYYY	No	No	No
Rate	Rate	Decimal	No	No	No
Wage	Wage	Decimal	No	No	No
Health Benefit State Shared	Health Benefit State Shared	Decimal	No	No	No
Health Benefit Not State Shared	Health Benefit Not State Shared	Decimal	No	No	No
Non-Health Benefits	Non-Health Benefits	Decimal	No	No	No
Admin Rate	Admin Rate	Decimal	No	No	No
Estimated Taxes	Estimated Taxes	Decimal	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Create Public Authority Wage Rate

CI	Document Name
CI-67398 - DSD SC Create Public Authority Wage Rate IMPLEMENTED	DSD_SC_Create_Public_Authority_Wage_Rate.doc

The Create Public Authority Wage Rate screen allows a user to add a new Public Authority wage rate. This screen displays when the user selects the New link from the Public Authority Wage Rate list screen for a county.

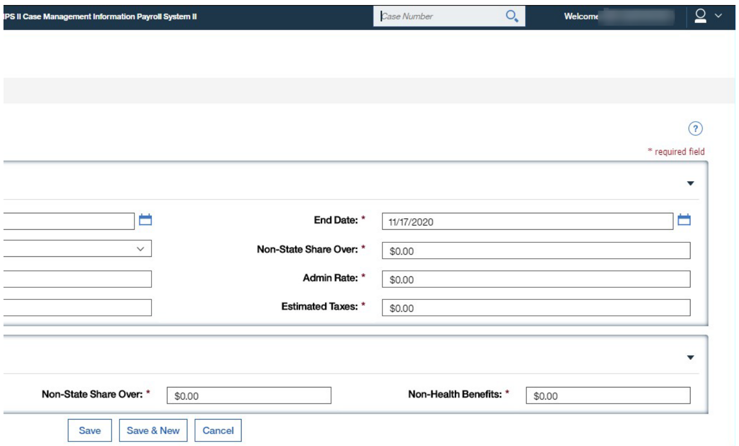


Figure – Create Public Authority Wage Rate

Actions/Functions

The following actions are associated with the Create Public Authority Wage Rate screen:

Actions	Function
Save	Saves data entered and returns the user to the Create Wage Rate screen.
Save & New	Saves data entered and allows the user to add another rate.
Cancel	Cancel dismisses the current screen and takes the user back to the Create Wage Rate screen.

Data Elements

The following data elements are specific to the Create Public Authority Wage Rate screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Effective Date	Effective Date of Rate	Date MM/DD /YYYY	Yes	No	Yes
End Date	End date of this rate	Date MM/DD /YYYY	Yes	No	Yes
Type	Type can be: • Public Authority • Non Profit Consortium • Joint Powers Agreement	Drop-down	Yes	No	Yes
Non-State Share Over	Non-State Share Over the State Allowed rate for reimbursement	Decimal	Yes	$0.00	Yes
Rate	Rate	Decimal	Yes	$0.00	Yes

Admin Rate	Admin Rate	Decimal	Yes	$0.00	Yes
Wage	Wage	Decimal	Yes	$0.00	Yes
Estimated Taxes	Estimated Taxes	Decimal	Yes	$0.00	Yes
Health Benefits					
State Shared	Health Benefit State Shared	Decimal	Yes	$0.00	Yes
Not State Shared Over	Health Benefit Not State Shared	Decimal	Yes	$0.00	Yes
Non-Health Benefits	Non-Health Benefits	Decimal	Yes	$0.00	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/View Public Authority Wage Rate

CI	Document Name
CI-67426 - DSD SC View Public Authority Wage Rate IMPLEMENTED	DSD_SC_View_Public_Authority_Wage_Rate.doc

When the View link is selected for a specific Public Authority Wage Rate segment the View Wage Rate pop-up displays allowing the user to view the wage rate details.

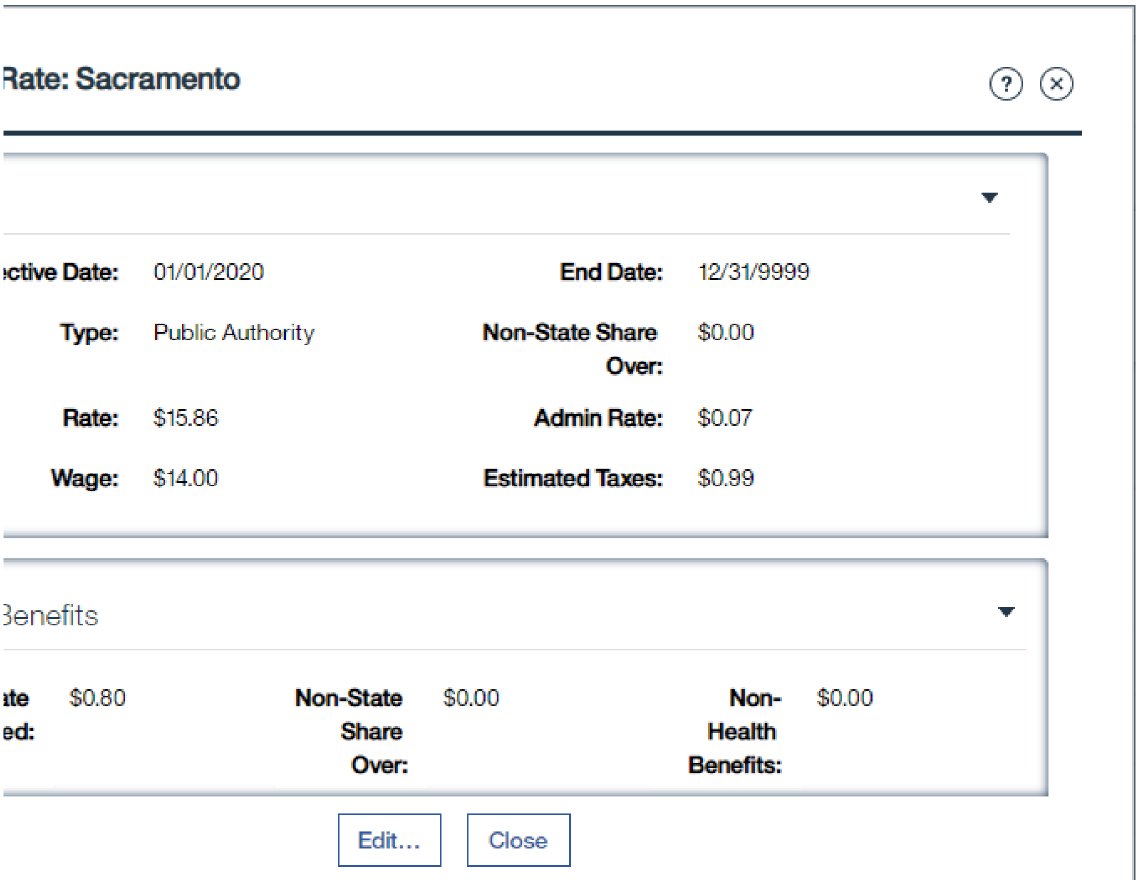


Figure – View Public Authority Wage Rate

Actions/Functions

The following actions are associated with the View Public Authority Wage Rate pop-up:

Actions	Function
Edit	Displays the Modify Wage Rate screen.
Close	Cancels the action and displays the Public Authority Wage Rate screen.

Data Elements

The following data elements are specific to the View Public Authority Wage Rate pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Details					
Effective Date	Effective Date of the Rate	Date MM/DD /YYYY	No	No	No
End Date	End Date of Rate	Date MM/DD /YYYY	No	No	No
Type	The Rate Type • Public Authority • Non Profit Consortium • Joint Powers Agreement	String	No	No	No
Non-State Share Over	Non-State Share Over the State Allowed rate for reimbursement	Decimal	No	No	No
Rate	Rate	Decimal	No	No	No
Admin Rate	Admin Rate	Decimal	No	No	No
Wage	Wage	Decimal	No	No	No
Estimated Taxes	Estimated Taxes	Decimal	No	No	No
Health Benefits					
State Shared	Health Benefit State Shared	Decimal	No	No	No
Not State Shared Over	Health Benefit Not State Shared	Decimal	No	No	No
Non-Health Benefits	Non-Health Benefits	Decimal	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Modify Public Authority Wage Rate

CI	Document Name
CI-67422 - DSD SC Modify Public Authority Wage Rate IMPLEMENTED	DSD_SC_Modify_Public_Authority_Wage_Rate.doc

When the Edit link is selected from Public Authority Wage Rage screen or from the View Wage Rate screen the Modify Wage Rate pop-up displays.

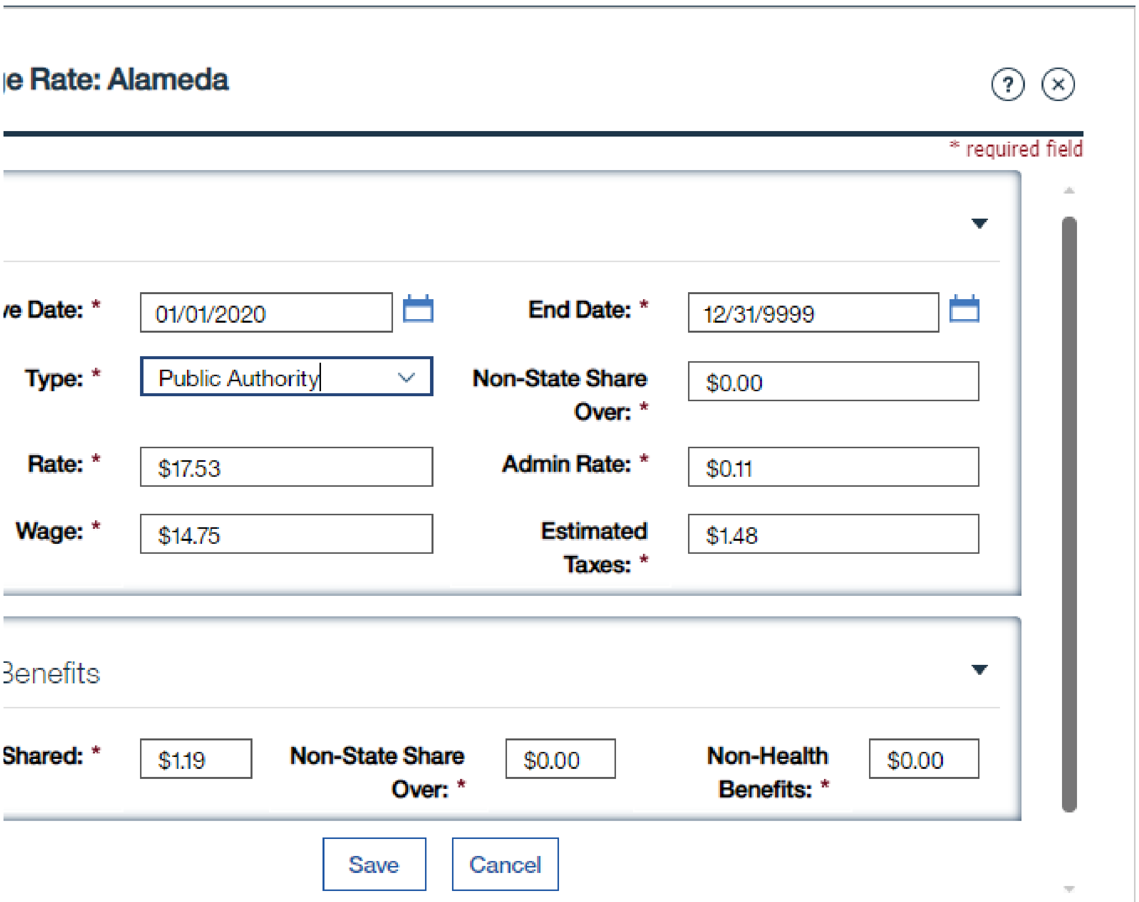


Figure – Modify Public Authority Wage Rate

Actions/Functions

The following actions are associated with the Modify Public Authority Wage Rate pop-up:

Actions	Function
Save	Saves the screen and displays the screen of origin.
Cancel	Cancels the screen and displays the screen of origin

Data Elements

The following data elements are specific to the Modify Public Authority Wage Rate pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field

Details					
Effective Date	Effective date of rate	Date MM/DD /YYYY	Yes	Current Date	Yes
End Date	End date of rate	Date MM/DD /YYYY	Yes	Current Date	Yes
Type	Select type from the drop-down list.	Drop-down List	Yes	No	Yes
Non-State Share Over	Non-State share over the State allowed rate for reimbursement.	Decimal	Yes	No	Yes
Rate	Rate	Decimal	Yes	No	Yes
Admin Rate	Admin rate	Decimal	Yes	No	Yes
Wage	Wage	Decimal	Yes	No	Yes
Estimated Taxes	Estimated Taxes	Decimal	Yes	No	Yes
Health Benefits					
State Shared	Health benefit State shared	Decimal	Yes	No	Yes
Not State Shared Over	Health benefit not State shared	Decimal	Yes	No	Yes
Non-Health Benefits	Non-health benefits	Decimal	Yes	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Paid Claims List

CI	Document Name
CI-67447 - DSD SC Paid Claims List IMPLEMENTED	DSD_SC_Paid_Claims_List.doc

When the Quality Assurance content tab is selected the Paid Claims List screen displays all in-patient and long term care Medi-Cal paid claims, from the Medi-Cal Service Match Interface, associated to the case. If the user is on another page within the Quality Assurance content tab, selecting the Paid Claims page navigation also displays this screen.

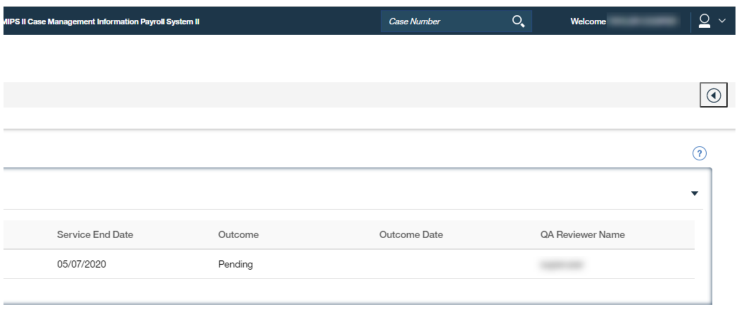


Figure – Paid Claims List

Actions/Functions

The following actions are associated with the Paid Claims List screen:

Actions	Function
View	Displays the View Paid Claim screen
Edit	Displays the Modify Paid Claim screen

Data Elements

The following data elements are specific to the Paid Claims List screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Service Type	The type of service. Valid values are "LTC" or "Inpatient".	String	No	No	No
Service Start Date	The begin date of the service.	Date MM/DD/YYYY	No	No	No
Service End Date	The end date of the service.	Date MM/DD/YYYY	No	No	No
Outcome	The current outcome (status) of the investigation.	String	No	No	No
Outcome Date	The outcome date.	Date MM/DD/YYYY	No	No	No
QA Reviewer Name	The name of the worker who last updated this record.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/View Paid Claim

CI	Document Name
CI-67446 - DSD SC View Paid Claim IMPLEMENTED	DSD_SC_View_Paid_Claim.doc

When the View link associated with a Paid Claim is selected the View Paid Claim screen displays.

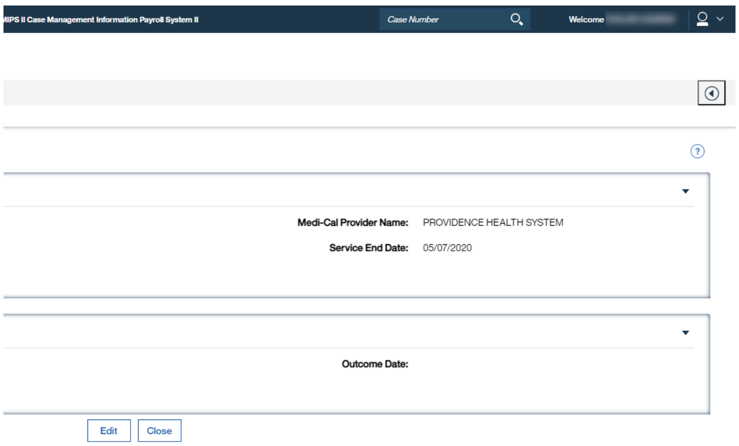


Figure – View Paid Claim

Actions/Functions

The following actions are associated with the View Paid Claim screen:

Actions	Function
Edit	Displays the Modify Paid Claim pop-up
Close	Closes the screen and displays the Paid Claim List screen.

Data Elements

The following data elements are specific to the View Paid Claim screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Paid Claim					
Service Type	The type of service. Valid values are "LTC" or "Inpatient".	String	No	No	No
Medi-Cal Provider Name	Name of the Medi-Cal service Provider.	String	No	No	No
Service Start Date	The begin date of the service.	Date MM/DD /YYYY	No	No	No
Service End Date	The end date of the service.	Date MM/DD /YYYY	No	No	No
Amount Paid	The amount of money paid for the service.	Decimal	No	No	No
Outcome					
Outcome	The outcome of the investigation.	String	No	No	No

Outcome Date	The outcome date.	Date MM/DD /YYYY	No	No	No
Overpayment Amount	The overpayment amount.	Decimal	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Modify Paid Claim

CI	Document Name
CI-67432 - DSD SC Modify Paid Claim IMPLEMENTED	DSD_SC_Modify_Paid_Claim.doc

The Modify Paid Claim pop-up displays when the user selects Edit from the Paid Claims List screen or Edit from the View Paid Claim screen.
Role Name: CASEMANAGEMENTROLE

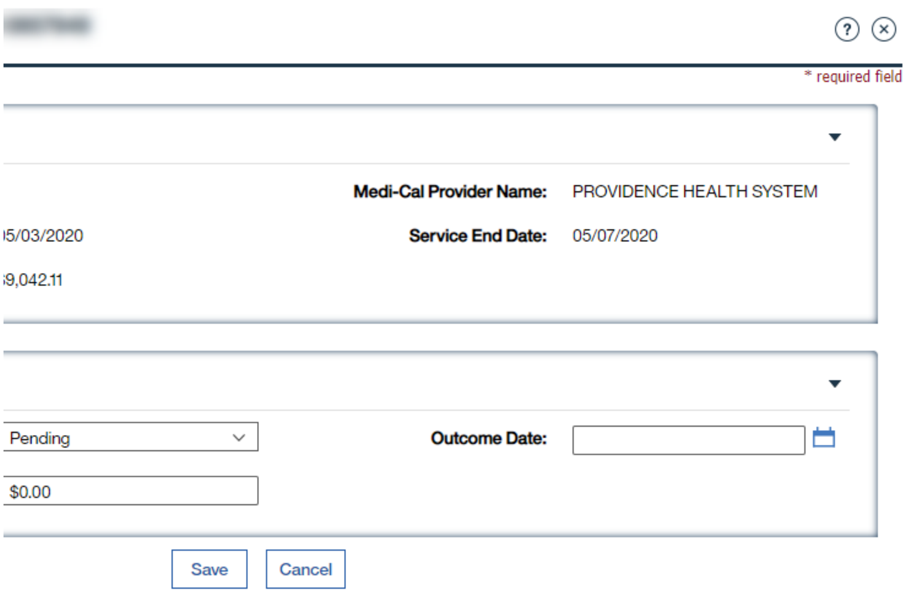


Figure - Modify Paid Claim

Actions/Functions

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

Actions	Function
Save	Saves the screen and returns the user to the screen of origin.
Cancel	Cancels the action and returns the user to the screen of origin.

Data Elements

The following data elements are specific to the Modify Paid Claim pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Paid Claim					
Service Type	The type of service. Valid values are "LTC" or "Inpatient".	String	No	System Populated	No
Medi-Cal Provider Name	Name of the Medi-Cal service Provider.	String	No	System Populated	No
Service Start Date	The begin date of the service.	Date MM/DD /YYYY	No	System Populated	No

Service End Date	The end date of the service.	Date MM/DD /YYYY	No	System Populated	No
Amount Paid	The amount of money paid for the service.	Decimal	No	System Populated	No
Outcome					
Outcome	The outcome of the investigation.	Drop-down List	Yes	Pending	Yes
Outcome Date	The outcome date.	Date MM/DD /YYYY	No	No	Yes
Overpayment Amount	The total overpayment amount (entered sum of all IHSS Provider overpayments resulting from the investigation).	Amount	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Case Investigation Referral List

CI	Document Name
CI-67423 - DSD SC Case Investigation Referral List IMPLEMENTED	DSD_SC_Case_Investigation_Referral_List.doc

When the Case Investigation page navigation is selected on the Quality Assurance content tab the Case Investigation Referral List screen displays with a list of all investigation referrals associated to the case.

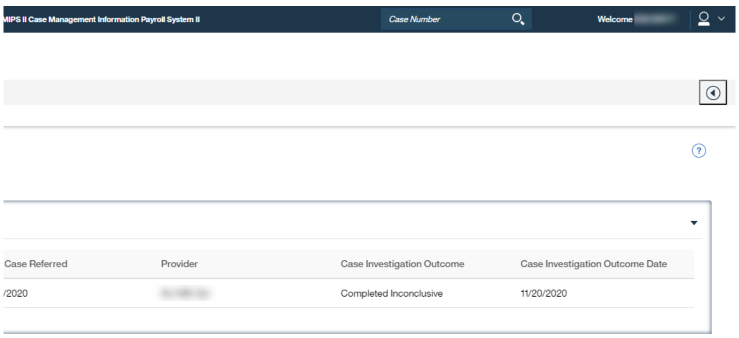


Figure – Case Investigation Referral List

Actions/Functions

The following actions are associated with the Case Investigation Referral List screen:

Actions	Function
New	Displays the Create Case Investigation Referral pop-up
Edit	Displays the Modify Case Investigation Referral pop-up

Data Elements

The following data elements are available to the Case Investigation Referral List screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Case Referred To	The entity to which the case was referred. Valid options are DHCS, Local Entity.	String	No	No	No
Date Case Referred	The date the case was referred to the entity.	Date MM /DD/YYYY	No	No	No
Provider	The name of the Provider referred for investigation. If a Provider is not indicated, the Recipient is referred for investigation.	String	No	No	No
Case Investigation Outcome	The case investigation outcome.	String	No	No	No
Case Investigation Outcome Date	The date of the case investigation outcome.	Date MM /DD/YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Create Case Investigation Referral

CI	Document Name
CI-67419 - DSD SC Create Case Investigation Referral IMPLEMENTED	DSD_SC_Create_Case_Investigation_Referral.doc

When the New action is selected on the Case Investigation Referral List screen the Create Case Investigation Referral pop-up displays allowing the user to create a new Case Investigation Referral.

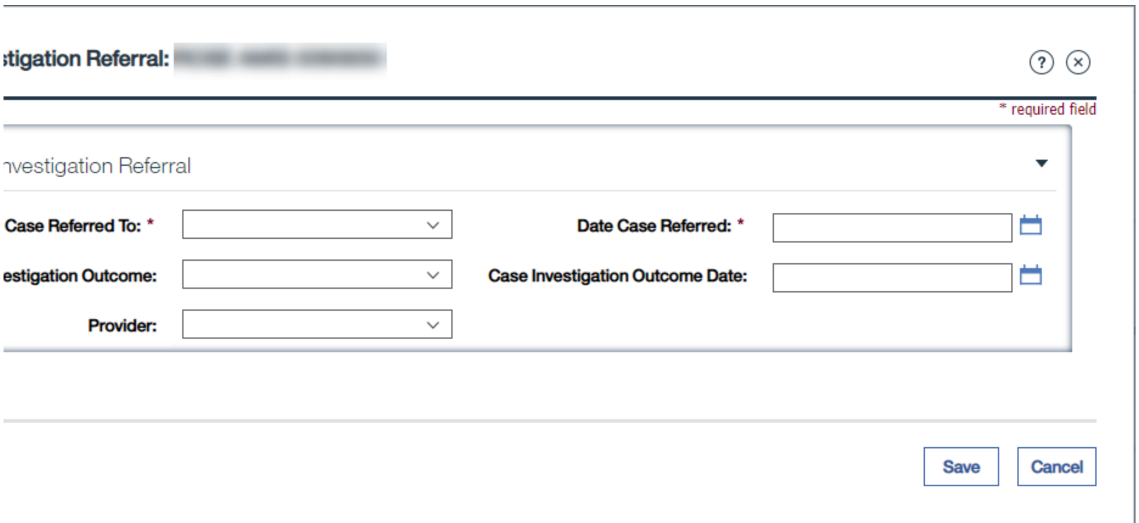


Figure - Create Case Investigation Referral

Actions/Functions

The following actions are associated with the Create Case Investigation Referral pop-up:

Actions	Function
Save	The Save link saves the case investigation information to the database and navigates the user back to the Case Investigation Referral list page.
Cancel	The Cancel action dismisses the screen.

Data Elements

The following data elements are available to the Create Case Investigation Referral pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Case Referred To	The entity to which the case was referred. Valid options are DHCS, Local Entity.	Drop-down List	Yes	No	Yes
Date Case Referred	The date the case was referred to the entity.	Date MM /DD /YYYY	Yes	No	Yes
Case Investigation Outcome	The case investigation outcome.	Drop-down List	No	No	Yes
Case Investigation Outcome Date	The Outcome Date of the case investigation.	Date MM /DD /YYYY	No	No	Yes

Provider	The name of the Provider referred for investigation. If the Provider is not selected, the Recipient is referred for investigation. Dropdown list displays all Providers for this case.	Drop-down List	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Modify Case Investigation Referral

CI	Document Name
CI-67442 - DSD SC Modify Case Investigation Referral IMPLEMENTED	DSD_SC_Modify_Case_Investigation_Referral.doc

When the Edit link is selected for a specific Case Investigation Referral the Modify Case Investigation Referral pop-up displays allowing the user to modify screen information.

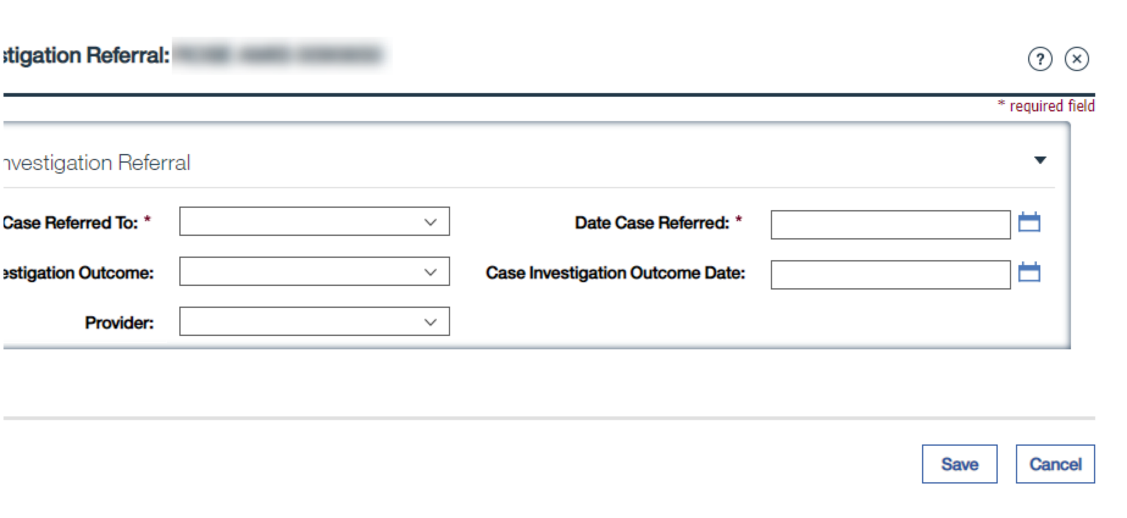


Figure – Modify Case Investigation Referral

Actions/Functions

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

Actions	Function
Save	The Save action saves the case investigation information to the database and navigates the user back to the Case Investigation Referral List screen.
Cancel	The Cancel action dismisses the screen.

Data Elements

The following data elements are available to the Modify Case Investigation Referral pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Case Referred To	The entity to which the case was referred. Valid options are DHCS, Local Entity.	Drop-down List	Yes	No	Yes
Date Case Referred	The date the case was referred to the entity.	Date MM /DD/YYYY	Yes	No	Yes
Case Investigation Outcome	The case investigation outcome.	Drop-down List	No	No	Yes
Case Investigation Outcome Date	The Outcome Come date of the case investigation,	Date MM /DD/YYYY	No	No	Yes
Provider	The name of the Provider referred for investigation. If the Provider is not selected, the Recipient is referred for investigation.	Drop-down	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/View Targeted Mailing

CI	Document Name
CI-116606 - DSD SC View Targeted Mailing IMPLEMENTED	DSD_SC_View_Targeted_Mailing.doc

When the Targeted Mailing page navigation is selected from the Quality Assurance content tab the Targeted Mailing screen displays a list of all targeted mailings which have been sent to the recipient.

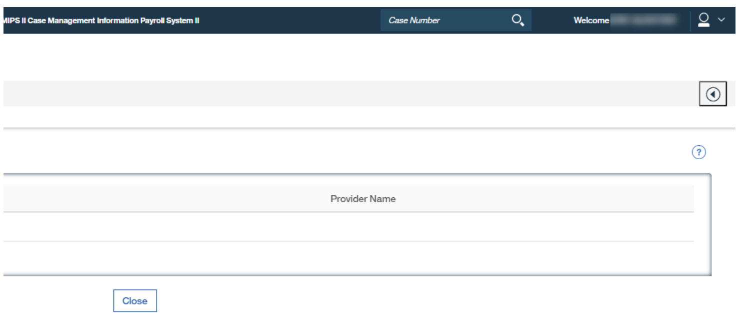


Figure – View Targeted Mailing

Actions/Functions

The following actions are associated with the View Targeted Mailing screen:

Actions	Function
Close	This action will close the screen and return the user to the Case Home page

Data Elements

The following data elements are specific to the View Targeted Mailing screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Date	The date of the targeted mailing.	Date MM/DD /YYYY	No	No	No
Criteria	The reason this case was selected for a targeted mailing.	String	No	No	No
Provider Name	If there is a Provider associated with the targeted mailing, the Provider Name will display	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/QA Assessment Review List

CI	Document Name
CI-67454 - DSD SC QA Assessment Review List IMPLEMENTED	DSD_SC_QA_Assessment_Review_List.doc

When the Assessment Review page navigation is selected from the Quality Review content tab the QA Assessment Review list screen displays allowing the user to view existing QA Assessment Reviews.

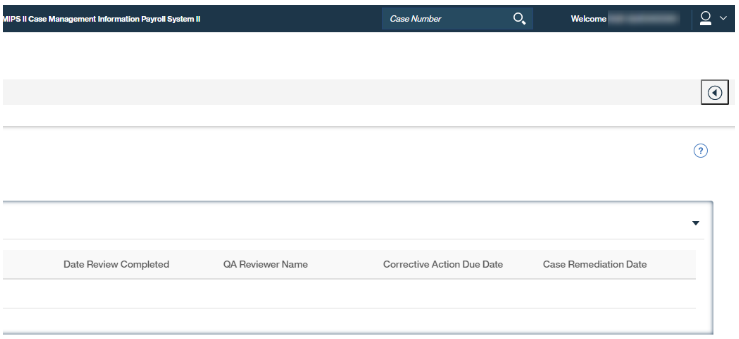


Figure – QA Assessment Review List

Actions/Functions

The following actions are associated with the QA Assessment Review List screen:

Actions	Function
Edit	Displays the Modify QA Assessment Review pop-up.
New	Displays Create QA Assessment Review pop-up.

Data Elements

The following data elements are available to QA Assessment Review List screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Review Type	The Assessment Review type	String	No	No	No
Targeted Review	Indicates whether or not the assessment review is targeted.	String	No	No	No
Date Review Completed	The date the assessment review was completed.	Date MM/DD /YYYY	No	No	No
QA Reviewer Name	The name of the worker who has completed the Assessment Review	String	No	No	No
Corrective Action Due Date	The due date of the corrective action.	Date MM/DD /YYYY	No	No	No
Case Remediation Date	The case remediation date.	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Create QA Assessment Review

CI	Document Name
CI-67403 - DSD SC Create QA Assessment Review IMPLEMENTED	DSD_SC_Create_QA_Assessment_Review.doc

When the New action is selected from the QA Assessment Review List screen the Create QA Assessment Review pop-up displays.

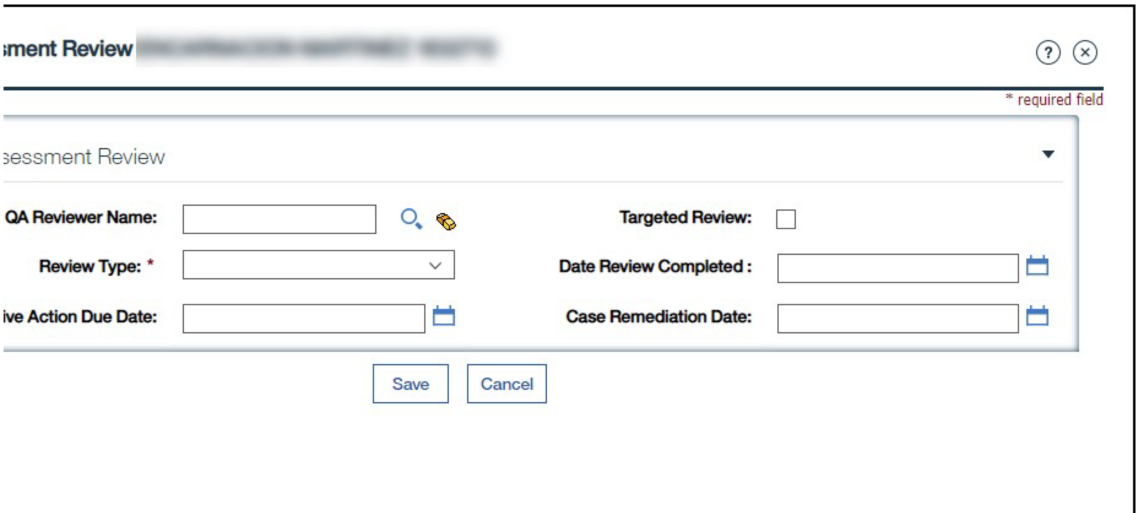


Figure – Create QA Assessment Review

Actions/Functions

The following actions are associated with the Create QA Assessment Review pop-up:

Actions	Function
Save	Saves the data and displays the QA Assessment Review List screen with the Assessment Review listed.
Cancel	Cancels the action and QA Assessment Review List screen.
QA Reviewer Name	Displays the User Search screen allowing the user to select a QA Reviewer Name.

Data Elements

The following data elements are specific to Create QA Assessment Review pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Targeted Review	Indicates whether or not the assessment review is targeted.	Checkbox	No	No	Yes
Review Type	The assessment review type.	Drop-down List	Yes	No	Yes
Date Review Completed	The date the assessment review was completed.	Date MM/DD /YYYY	No	No	Yes
Corrective Action Due Date	The due date of the corrective action.	Date MM/DD /YYYY	No	No	Yes
Case Remediation Date	The case remediation date.	Date MM/DD /YYYY	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Modify QA Assessment Review

CI	Document Name
CI-67435 - DSD SC Modify QA Assessment Review IMPLEMENTED	DSD_SC_Modify_QA_Assessment_Review.doc

The Modify QA Assessment Review pop-up allows the QA worker to modify the details of an existing assessment review. This pop-up displays when the Edit link is selected from the QA Assessment Review List screen.

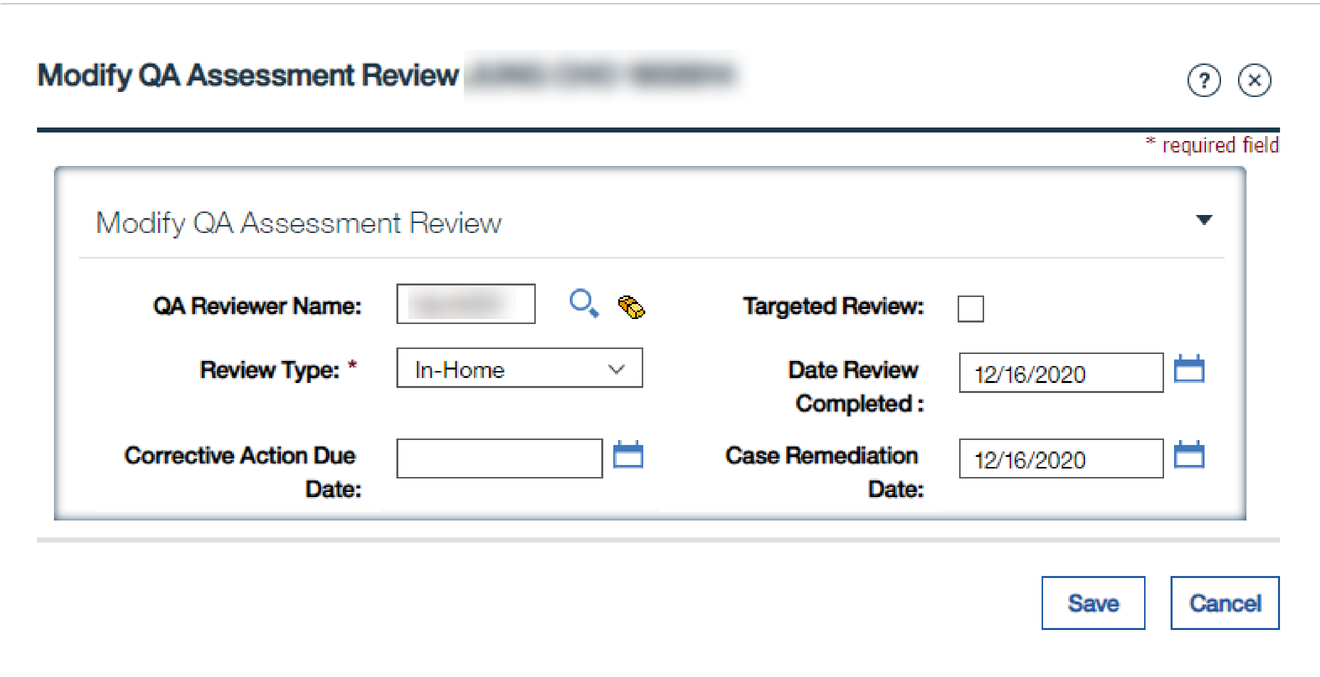


Figure - Modify QA Assessment Review

Actions/Functions

The following actions are associated with the Modify QA Assessment Review pop-up:

Actions	Function
Save	Saves the data and displays the QA Assessment Review List screen.
Cancel	Cancels the action and displays the QA Assessment Review List screen.
QA Reviewer Name	The user name of the county staff performing the review.

Data Elements

The following data elements are specific to Modify QA Assessment Review pop-up:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
Targeted Review	Indicates whether or not the assessment review is targeted.	Checkbox	No	No	Yes
Review Type	The assessment review type.	Drop-down List	Yes	No	Yes
Date Review Completed	The date the assessment review was completed.	Date MM/DD /YYYY	No	No	Yes

Corrective Action Due Date	The due date of the corrective action.	Date MM/DD /YYYY	No	No	Yes
Case Remediation Date	The case remediation date.	Date MM/DD /YYYY	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Provider Management – My Workspace

CI
CI-67465 - DSD SC Provider Management My Workspace IMPLEMENTED

When a user accesses the CMIPS Provider Management Workspace, the Provider Management - My Workspace screen displays. To search by either Case Number or Provider SSN, the user will select either SSN or Case Number from the drop-down search field in the upper right section of the screen.

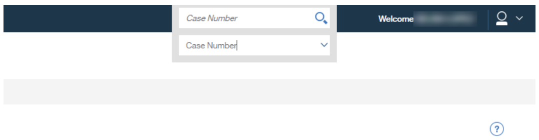


Figure – Provider Management – My Workspace

Actions/Functions

The following actions are associated with the Provider Management - My Workspace screen:

Actions	Function
<Task>	Displays the Task Home screen.

Data Elements

The following data elements are specific to the Provider Management - My Workspace screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Upper Right Section of Screen					
<Provider SSN /Case Number Search>	Select SSN or Case Number from the drop-down, and then enter Provider SSN to search for a Provider or Recipient case number to search for a case based on the selection.	Drop down	No	Yes	Yes
My Tasks					
Subject	Subject of the task	String	No	No	No
Due Date	Date the task is due	Date MM /DD /YYYY	No	No	No
Priority	The priority of the task	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Provider Management – Case Home

CI
CI-67416 - DSD SC Provider Management Case Home IMPLEMENTED

When a valid case number is keyed in the Case Number field on the Provider Management Workspace screen, the Provider Management – Case Home screen displays. This screen is also accessed by selecting the Home page navigation tab while the user is on the Provider Management - Case Providers screen or the Provider Management - Payment Search screen.

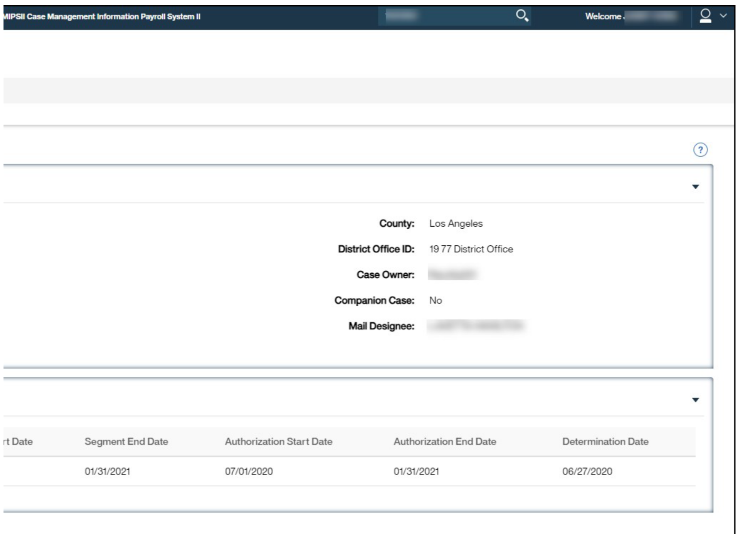


Figure – Provider Management – Case Home

Actions/Functions

The following action functionality is associated with the Provider Management - Case Home screen:

Actions	Function
View	Displays the Provider Management – Authorization Summary screen.

Data Elements

The following data elements are specific to the Provider Management - Case Home screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Case Number	Case Number	Numeric	No	No	No
County	The County currently responsible for the management of the IHSS case	String	No	No	No
Recipient Name	Name of the Recipient	String	No	No	No
District Office ID	The County District Office currently responsible for the management of the IHSS case	String	No	No	No
Interpreter Available	Indicates whether or not an interpreter is available (Yes/No)	String	No	No	No
Case Owner	County Worker who owns the Case	String	No	No	No
Number of Household Members	Number of individuals in the household	String	No	No	No

Companion Case	Indicated whether or not there are associated Companion cases (Yes /No)	String	No	No	No
Status	Case Status	String	No	No	No
Mail Designee	An individual designated to receive mail for the Recipient	String	No	No	No
Status Date	The date the case status was assigned	Date MM/DD /YYYY	No	No	No
Authorization Segments					
Decision	When the case is Eligible or Ineligible	String	No	No	No
Auth to Purchase	The Auth to Purchase After Reduced Hours for the indicated Authorization Segment	Integer	No	No	No
Segment Start Date	The Start Date of the Authorization Segment	Date MM/DD /YYYY	No	No	No
Segment End Date	The End Date of the Authorization Segment	Date MM/DD /YYYY	No	No	No
Authorization Start Date	The Start Date of the associated Authorization Period	Date MM/DD /YYYY	No	No	No
Authorization End Date	The Start End of the associated Authorization Period	Date MM/DD /YYYY	No	No	No
Determination Date	The date the authorization segment was processed and became active	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Provider Management – Authorization Summary

CI
CI-67443 - DSD SC Provider Management Authorization Summary IMPLEMENTED

When the View link associated with an authorization segment is selected on the Provider Management - Case Home screen, the Provider Management - Authorization Summary screen for the selected segment displays.

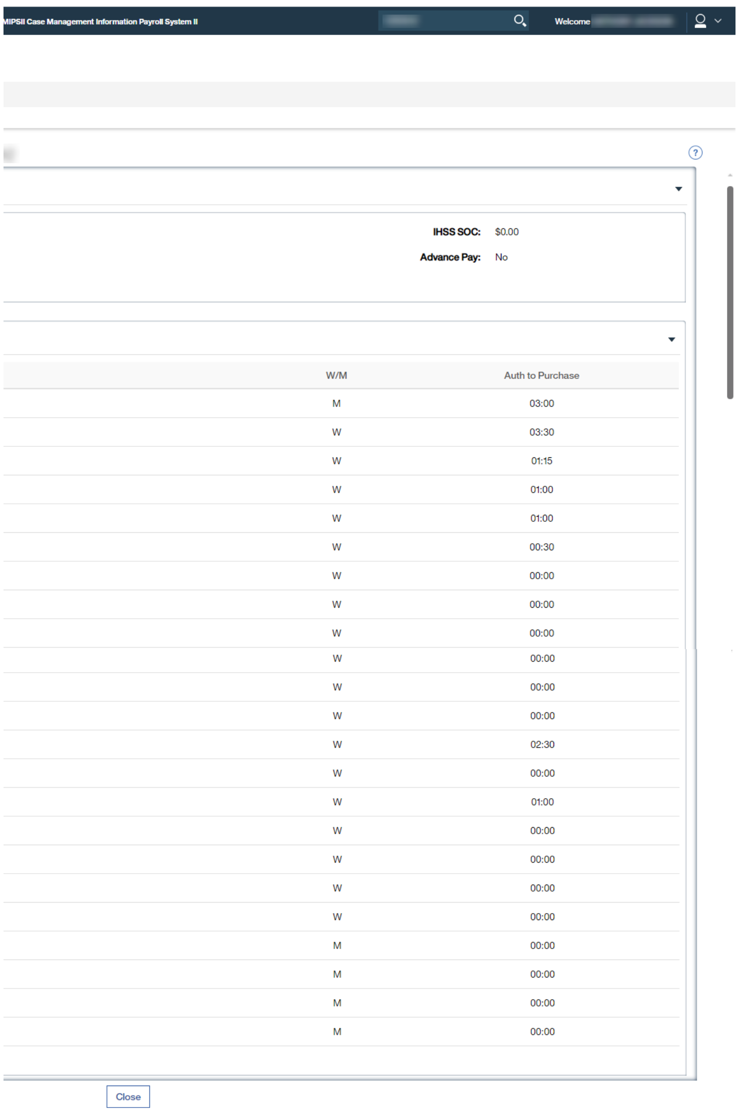


Figure – Provider Management – Authorization Summary

Actions/Functions

The following actions are associated with the Provider Management - Authorization Summary screen:

Actions	Function
Close	Closes the screen and returns the user to the Provider Management - Case Home screen.

Data Elements

The following data elements are specific to the Provider Management - Authorization Summary screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Authorization Summary					
Authorization Segment Start Date	Authorization Segment Start Date	Date MM /DD /YYYY	No	No	No
IHSS SOC	Indicates whether or not the Recipient has an IHSS SOC (Yes/No)	String	No	No	No
Authorization Segment End Date	Authorization Segment End Date	Date MM /DD /YYYY	No	No	No
Advance Pay	Indicates whether or not the Recipient has Advance Pay (Yes/No)	String	No	No	No
Total Auth to Purchase	Total Auth to Purchase hours for all Services for the Authorization Segment. This amount will always reflect the Recipients Total Authorized Hours after all mandated reductions.	Integer	No	No	No
Service Type Details					
Service Type	Indicates 25 IHSS Service Types	String	No	No	No
W/M	Indicates whether the hours, associated with Auth to Purchase, are Weekly or Monthly	String	No	No	No
Auth to Purchase	The Auth to Purchase hours for the Service Type	Integer	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Provider Management – Case Providers

CI
CI-67406 - DSD SC Provider Management Case Providers IMPLEMENTED

When the Case Providers page navigation is selected while on the Provider Management - Case Home screen or the Provider Management - Payment Search screen, the Provider Management - Case Providers screen displays.

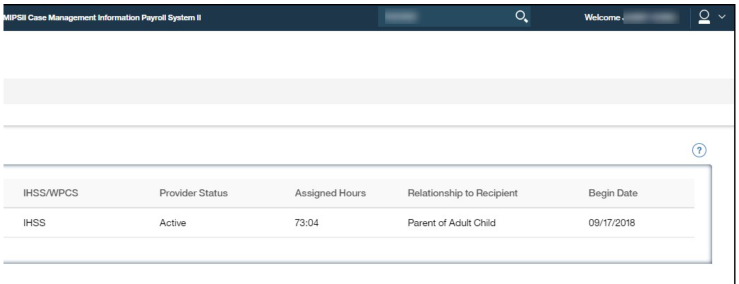


Figure – Provider Management – Case Providers

Actions/Functions

The following actions are associated with the Provider Management - Case Providers screen:

Actions	Function
View	Displays the Provider Management - View Case Provider screen.

Data Elements

The following data elements are specific to the Provider Management - Case Providers screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Provider Number	Provider Number	String	No	No	No
Provider Name	Provider Name. Displays as Last Name, First Name.	String	No	No	No
IHSS/WPCS	Indicates if the Provider is IHSS or WPCS. If a Provider is both, the Provider will be listed twice.	String	No	No	No
Provider Status	Provider Status	String	No	No	No
Assigned Hours	Assigned Hours for the most current date. Display in HH:MM format.	HH:MM	No	No	No
Relationship to Recipient	Provider relationship to the Recipient.	String	No	No	No
Begin Date	Earliest Begin Date for this Provider for this case.	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Provider Management – View Case Provider

CI
CI-67449 - DSD SC Provider Management View Case Provider IMPLEMENTED

When the View link associated with a specific Provider is selected from the Provider Management - Case Providers screen, the Provider Management - View Case Provider screen displays.

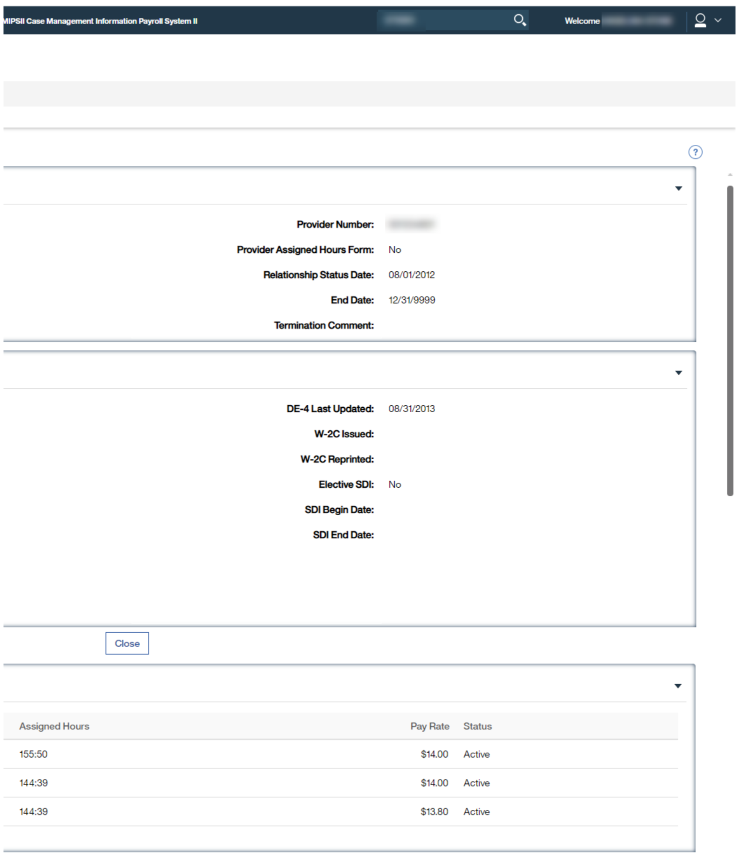


Figure – Provider Management – View Case Provider

Actions/Functions

The following action functionality is associated with the Provider Management – View Case Provider screen:

Actions	Function
Close	Closes the Provider Management - View Case Provider screen and displays the Provider Management – Case Providers screen.

Data Elements

The following data elements are specific to the Provider Management – View Case Provider screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Details					
Provider Name	Provider Name	String	No	No	No
Provider Number	Provider Number	String	No	No	No
Provider Status	The current Provider status	String	No	No	No
Provider Assigned Hours Form	Assigned Hours Form	String	No	No	No
Relationship to Recipient	Provider's relationship to Recipient.	String	No	No	No
Relationship Status Date	Date of a change in the relationship status (e.g. date of Marriage/Divorce)	Date MM /DD/YYYY	No	No	No
Begin Date	Earliest begin date of the Provider for this case	Date MM /DD/YYYY	No	No	No
End Date	Latest end date of the Provider for this case	Date MM /DD/YYYY	No	No	No
Termination Reason	Provider termination reason. This field will be entered only when Provider Status = Terminated.	String	No	No	No
Termination Comment	Termination Comment. This field will be entered when Provider Termination Reason = Other	String	No	No	No
Financial					
W-4 Status	Valid values: Single Married Head of Household	String	No	No	No
W-4 Allowance	Number of allowances. Valid values: 0-99	Number	No	No	No
W-4 Amount	Dollar amount	Decimal	No	No	No
W-4 Last Updated	The date on which the W-4 was last updated	Date MM /DD/YYYY	No	No	No
W-2 Issued	The date on which the W-2 for the tax year was issued	Date MM /DD/YYYY	No	No	No
W-2 Reprinted	The date on which the W-2 for the tax year was reprinted	Date MM /DD/YYYY	No	No	No
DE-4 Status	Valid values: Single Married Head of Household	String	No	No	No
DE-4 Allowance	Number of allowances. Valid values: 0-99	Number	No	No	No
DE-4 Amount	Dollar amount	Decimal	No	No	No
DE-4 Last Updated	The date on which the DE-4 was last updated	Date MM /DD/YYYY	No	No	No
W-2C Issued	The date on which the W-2C was last issued	Date MM /DD/YYYY	No	No	No
W-2C Reprinted	The date on which the W-2C was reprinted	Date MM /DD/YYYY	No	No	No
Elective SDI	Indicator Elective SDI Withholding. Valid values: YES or NO.	String	No	No	No
SDI Begin Date	Date of Entry to begin Elective SDI Withholding	Date MM /DD/YYYY	No	No	No
SDI End Date	Date Elective SDI Withholding is to end. (Must be greater than the end of the following year of the SDI Begin Date unless Provider turns 18)	Date MM /DD/YYYY	No	No	No
Provider Hours					
Begin Date	Begin date of Assigned Hours. The most recent three Provider hours periods will display.	Date MM /DD/YYYY	No	No	No
End Date	End date of Assigned Hours	Date MM /DD/YYYY	No	No	No
Assigned Hours	Hours assigned for the Provider for the time period between the begin date and end date. Display in HH:MM format.	HH:MM	No	No	No
Pay Rate	Will be related to a table of rates for the County. Each rate will be linked to a grade/step. Display in dollar amount.	Decimal	No	No	No

Status	The Provider's enrollment status	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Provider Management – Payment Search

CI
CI-67396 - DSD SC Provider Management Payment Search IMPLEMENTED

When the Payment Search page navigation is selected Provider Management - Case Home screen or Provider Management - Case Providers content tab the Provider Management – Payment Search screen displays. After the user enters the From Date and To Dates then selects the Search action records matching the Search Criteria display in the Search Results section of the screen.

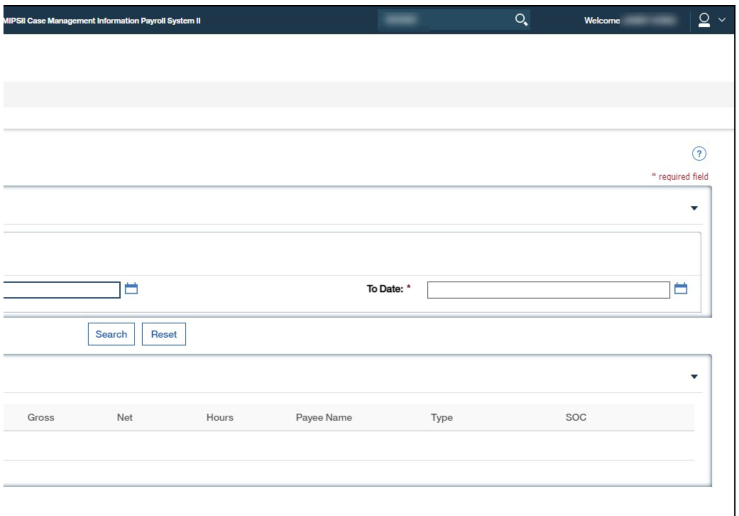


Figure – Provider Management – Payment Search

Actions/Functions

The following action functionality is associated with the Provider Management - Payment Search screen:

Actions	Function
Search	Performs the search based upon the indicated search criteria.
Reset	Clears values in From Date and To Date fields.

Data Elements

The following data elements are specific to the Provider Management - Payment Search screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria – Service Period - The search must be refined by a Service Period range (range is limited to a 13-month time span).					
From	Service date from which to start searching for payments.	Date MM /DD/YYYY	Yes	No	Yes
To	Service date to cease searching for payments.	Date	Yes	No	Yes
Search Results					
Service From	Begin Date of pay period.	Date MM /DD/YYYY	No	No	No
Issued	Initially set to the date on which the payment was processed. Replaced with the warrant issue date when this information is provided by the SCO.	Date MM /DD/YYYY	No	No	No

Status	Status of Payment: Paid Cleared Pending Void Void Pending Replacement Stale-Dated	String	No	No	No
Warrant Number	Unique identifier of the warrant issued by the SCO. This field will contain all zeroes until the information is returned from SCO: If payment was made via warrant, the warrant number will begin with a '7'. If payment was made via EFT, the warrant number will begin with a '9'.	String	No	No	No
Gross	Gross wages, calculated as Hours Paid times Pay Rate, before deductions.	Decimal	No	No	No
Net	Amount of the payment after deductions.	Decimal	No	No	No
Hours	Hours of service paid. Displayed in an HH:MM format.	String	No	No	No
Payee Name	First Name and Last Name of the Payee.	String	No	No	No
Type	The Type of Payment Type of payment: Advance Pay – Regular Advance Pay – Initial Advance Pay – Additional Advance Pay – Over Reported Hours IP Pay Legislative Change Overpayment Recovery Refund Paramedical Reimbursement Prior Underpayment Restaurant Meals - Regular Restaurant Meals – Initial State Hearing Supplemental Hours Writ of Admin Mandamus WPCS Pay	String	No	No	No
SOC	SOC amount deducted from the payment.	Decimal	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/CDPH Death Match

CI
CI-67444 - DSD SC CDPH Death Match IMPLEMENTED

When the CDPH page navigation is selected from the Person Home content tab the CDPH Death Match Notification screen displays a list of death match data received from CDPH.

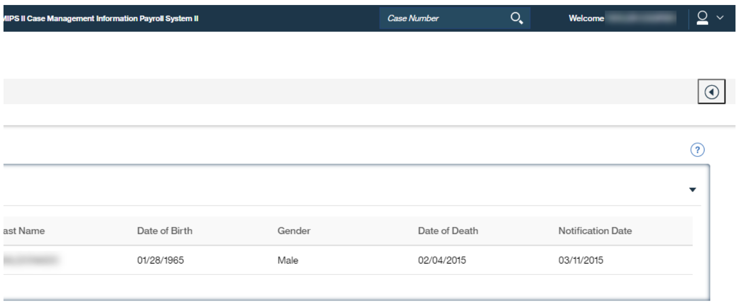


Figure – CDPH Death Match

Actions/Functions

The following actions are associated with the CDPH Death Match screen:

Actions	Function
View	Displays the CDPH Death Match screen.

Data Elements

The following data elements are specific to the CDPH Death Match screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
First Name	The first name of the person who has been reported as dead.	String	No	No	No
Middle Name	The middle name of the person who has been reported as dead.	String	No	No	No
Last Name	The last name of the person who has been reported as dead.	String	No	No	No
Date of Birth	The date of birth of the person who has been reported as dead.	Date MM/DD/YYYY	No	No	No
Gender	The gender of the person who has been reported as dead.	String	No	No	No
Date of Death	The reported date of death.	Date MM/DD/YYYY	No	No	No
Notification Date	The date CMIPS received the CDPH notification.	Date MM/DD/YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/View CDPH Death Match

CI
CI-67455 - DSD SC View CDPH Death Match IMPLEMENTED

The View CDPH Death Match screen displays the detail of a death notification received from CDPH for a Recipient or Provider. This screen displays when the user selects View for a record from the CDPH Death Match list screen.

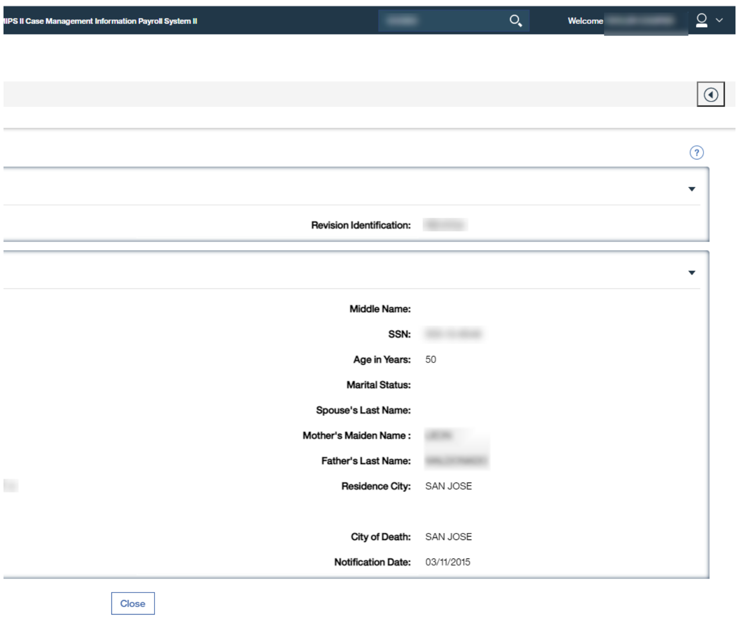


Figure – View CDPH Death Match

Actions/Functions

The following actions are associated with the View CDPH Death Match screen:

Actions	Function
Close	Closes the screen and display the CDPH Death Match screen.

Data Elements

The following data elements are specific to the View CDPH Death Match screen:

Field Name	Description	Data Type	Required Indicator	Default Value	Editable Field
CDPH Information					
State File Number	CDPH use. Received from interface.	String	No	No	No
Revision Identification	CDPH use. Received from interface.	String	No	No	No
Details					
First Name	The first name of the person who has been reported as dead.	String	No	No	No
Middle Name	The middle name of the person who has been reported as dead.	String	No	No	No

Last Name	The last name of the person who has been reported as dead.	String	No	No	No
SSN	The SSN of the person who has been reported as dead.	String	No	No	No
Date of Birth	The date of birth of the person who has been reported as dead.	Date MM/DD /YYYY	No	No	No
Age in Years	The age in years of the person who has been reported as dead.	String	No	No	No
Gender	The gender of the person who has been reported as dead.	String	No	No	No
Marital Status	The marital status of the person who has been reported as dead.	String	No	No	No
Spouse's First Name	The first name of the surviving spouse of the person who has been reported as dead.	String	No	No	No
Spouse's Last Name	The last name of the surviving spouse of the person who has been reported as dead.	String	No	No	No
Mother's First Name	The first name of the mother of the person who has been reported as dead.	String	No	No	No
Mother's Maiden Name	The maiden name of the mother of the person who has been reported as dead.	String	No	No	No
Father's First Name	The first name of the father of the person who has been reported as dead.	String	No	No	No
Father's Last Name	The last name of the father of the person who has been reported as dead.	String	No	No	No
Residence Street	The name of the street where the reported person lived.	String	No	No	No
Residence City	The name of the city where the reported person lived.	String	No	No	No
Residence County	The name of the county where the reported person lived.	String	No	No	No
Date of Death	The reported date of death.	Date MM/DD /YYYY	No	No	No
City of Death	The name of the city where the person died.	String	No	No	No
County of Death	The name of the county where the person died.	String	No	No	No
Notification Date	The date CMIPS received the CDPH notification.	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Select Organization Unit

CI	Document Name
CI-790162 - DSD SC Select Organization Unit IMPLEMENTED	DSD_SC_Select_Organization_Unit.docx

The Select Organization Unit pop-up allows a user to select a district office or organization unit. The pop-up is accessed by selecting the search icon for the District Office field on the Work Queue Tasks screen.

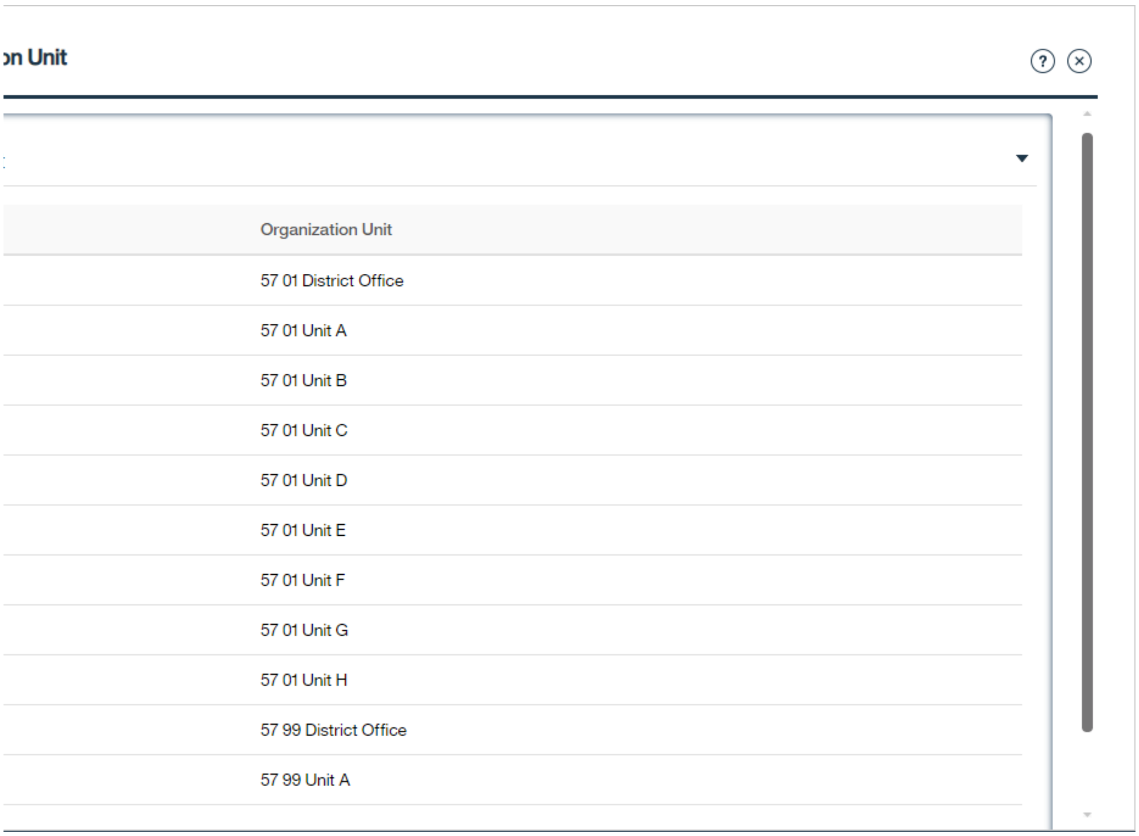


Figure – Select Organization Unit

Actions/Functions

The following actions are associated with the Select Organization Unit pop up:

Actions	Function
Select	Populates the district office selected in the District Office search field on the Work Queue Tasks screen

Data Elements

The following data elements are specific to the Select Organization Unit pop up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Organization Unit	List of District Offices and Units for the user's County	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW – Home

CI	Document Name
CI-813207 - DSD SC SW Home IMPLEMENTED	DSD_SC_SW_Home.docx

When a "CASEMANAGEMENTSUPERVISOR" user logs on through the CMIPS web portal then selects the Case Management link the SW – Home (Supervisor Workspace) displays. The SW – Home is customizable by selecting the icon in the upper right corner of the screen. Each cluster on the screen may also be moved to meet a users needs by simply clicking/selecting and holding the cluster header, dragging the cluster to another area of the screen and releasing the cluster.

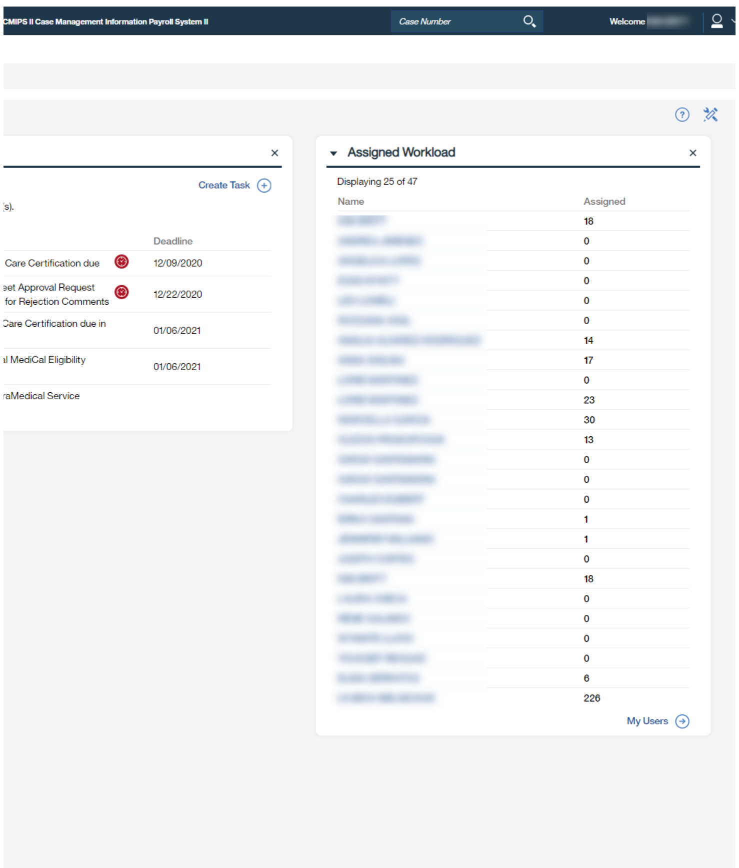


Figure – SW (Supervisor Workspace) - Home

Actions/Functions

The following actions are associated with the SW – Home screen:

Actions	Function
	Displays the customizable features of the workspace.
My Organization Units	
My Org Units	Displays the supervisor's My Organization Units screen
My Work Queues	
Name	Displays the workspace for the selected work queue

My Tasks	
Create Task	Displays the Create Task pop-up
Assigned Workload	
Name	Displays the selected user's Workspace
My Users	Displays the My Users screen

Data Elements

The following data elements are specific to the SW Supervisor Workspace screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
My Organization Units					
Name	The Organization name	String	No	No	No
Members	The number of user's assigned to the Organization Unit	Number	No	No	No
Tasks	The number of Tasks associated with the Organization Unit	Number	No	No	No
My Work Queues					
Members	The number of members assigned to the indicated Work Queue	Number	No	No	No
Tasks	The number of Tasks associated with the Work Queue	Number	No	No	No
My Tasks					
Subject	Subject of task	String	No	No	No
Deadline	The deadline of the task	Number	No	No	No
Assigned Workload					
Assigned	The count of active cases (Pending, Eligible, Presumptive Eligible, or Leave status) assigned to the user.	Number	No	No	No
Recent Notification					
Subject	A short summary of the purpose or content of the notification	String	No	No	No
Date	The date and time the notification was created in the system.	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW My Users

CI
CI-813209 - DSD SC SW My Users IMPLEMENTED

When the SW - Team and Workloads tab is selected in the upper left corner of any screen in the Supervisor Workspace, the SW My Users workspace screen displays a list of the users assigned to the Supervisor. The list is sorted by Name. The user details are collapsed when first accessing this screen but will be collapsed or expanded based on how that screen was left during the current session.

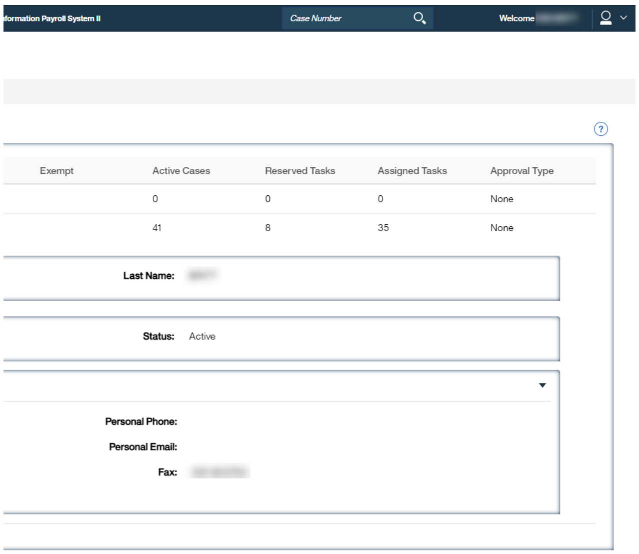


Figure – SW My Users

Actions/Functions

The following actions are associated with the SW My Users screen:

Actions	Function
	Expansion toggle for a user when the additional details are collapsed. Selecting this toggle will provide the expanded details for this user.
	Expansion toggle for a user when the additional details are expanded. Selecting this toggle will collapse the details for this user.
Name <First Last>	Displays the SW User Workspace of the selected user.
Next	Displays the next 25 users. Only displays when more than 25 users are associated with the supervisor.
Previous	Displays the previous 25 users. Only displays when the Next link was previously selected.
Expanded Detail View	
<email address>	When this link is selected a new draft email will be opened in the user's default mail application with the email address populated in the addressee To field.

Data Elements

The following data elements are specific to the SW My Users screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Last Logon	The date of the last logon	Date MM/DD /YYYY	No	No	No
Leave	If indicated, the date the User ID Management – Leave record was added	Date MM/DD /YYYY	No	No	No
Exempt	If indicated, the date the User ID Management – Exempt User from Deactivation record was added	Date MM/DD /YYYY	No	No	No
Active Cases	Displays the number of cases assigned to the user with the Case Status of Pending, Eligible, Presumptive Eligible or Leave	Number	No	No	No
Reserved Tasks	Displays the number of reserved tasks associated with the user	Number	No	No	No
Assigned Tasks	Displays the number of tasks assigned to the user	Number	No	No	No
Approval Type	Displays approval types associated with the case	String	No	No	No
Expanded Detail View					
First Name	The user's first name	String	No	No	No
Last Name	The user's last name	String	No	No	No
Role	The user's security role	String	No	No	No
Status	The status of the user	String	No	No	No
Expanded Detail View - Contact Details Cluster					
Business Phone	User's business phone	String	No	No	No
Personal Phone	User's personal phone	String	No	No	No
Business Email	User's business email	String	No	No	No
Personal Email	User's personal email	String	No	No	No
Mobile	User's mobile phone number	String	No	No	No
Fax	User's fax number	String	No	No	No
Pager	User's pager number	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User Workspace

CI	Document Name
CI-813226 - DSD SC SW User Workspace IMPLEMENTED	DSD_SC_SW_User_Workspace.docx

When the Name link is selected from the SW My User screen, the SW User Workspace screen displays information associated with the selected user.

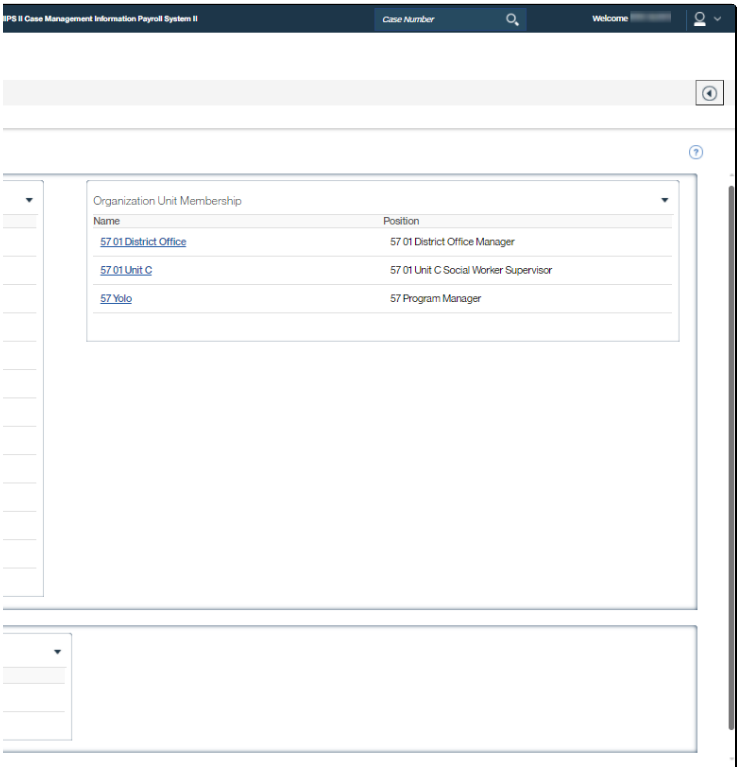


Figure – SW User Workspace

Hyperlinks/Functions

The following hyperlink functionality is associated with the SW User Workspace screen:

Hyperlink	Function
Content Tabs	
Home	Displays the SW User Workspace screen
Tasks	Displays the SW User Assigned Tasks screen
Cases	Displays the SW User Cases screen
Work Queues	Displays the SW User Work Queues screen
Approvals	Displays the SW User Approvals screen
Work Queue Subscription	
Name	Displays the selected Work Queue
Organization Unit Membership	

Name	Displays the list of users associated with the organizational unit selected.
User ID Management – Leave	
Leave	Displays the User ID Management – Leave pop-up. This link only displays when a User ID Management – Leave record does not exist. Allows the user to create a User ID Management – Leave record.
End Leave	Displays the Inactive User ID Management – End Leave pop-up. This link only displays when a User ID Management – Leave record exists. Allows the user to end an existing Leave record.
User ID Management – Exempt User from Deactivation This cluster is only viewable by those with a CDSS User role	
Exempt User from Deactivation	Displays the User ID Management – Deactivation Exemption pop-up. This link only displays when a User ID Management – Deactivation Exemption record does not exist. Allows the user to create a User ID Management – Deactivation Exemption record.
Remove Exemption	Displays the User ID Management – Remove Exemption pop-up. This link only displays when a User ID Management – Exempt User from Deactivation record exists. Allows the user to inactive an existing Exempt User from Deactivation record.

Data Elements

The following data elements are specific to the SW User Workspace screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Organization Unit Membership					
Position	The position to which the user is assigned in the County	String	No	No	No
User ID Management – Leave					
Date	The date the User ID Management – Leave record was entered.	Date MM/DD /YYYY	No	No	No
User ID Management – Exempt User from Deactivation This cluster is only viewable by those with a CDSS User role					
Date	The date the User ID Management – Deactivation Exemption record was entered.	Date MM/DD /YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Reserve Assigned Tasks

CI
CI-813212 - DSD SC SW Reserve Assigned Tasks IMPLEMENTED

When the Reserve Assigned Tasks link is selected from the Manage cluster on the SW User Workspace header, the Reserve Assigned Tasks pop-up displays allowing the supervisor to reserve one or more tasks to the user.

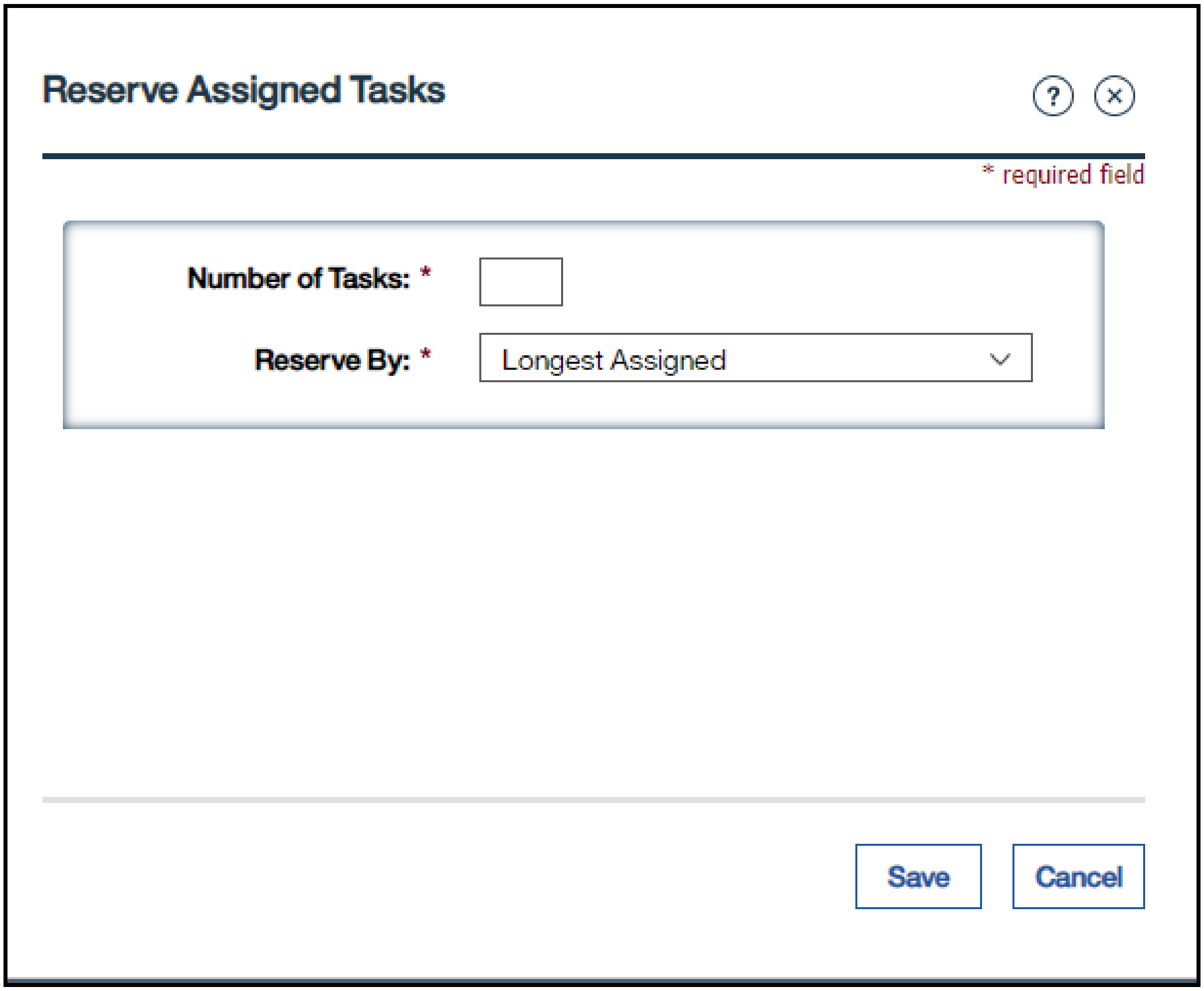


Figure – SW Reserve Assigned Tasks

Actions/Functions

The following actions are associated with the SW Reserve Assigned Tasks pop-up:

Actions	Function
Save	Saves the Reserve Assigned Tasks data and returns the user to the SW User Workspace.
Cancel	Cancels the action and returns the user to the SW User Workspace

Data Elements

The following data elements are specific to the SW Reserve Assigned Tasks pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Number of Tasks	Allows the supervisor to designate the number of task which will be reserved to the user	Number	Yes	No	Yes
Reserve By	Allows the supervisor to select tasks to be reserve based upon either the Longest Assigned or By Priority	Drop Down	Yes	Longest Assigned	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Reserve Tasks from Work Queue

CI	Document Name
CI-813211 - DSD SC SW Reserve Tasks From Work Queue IMPLEMENTED	DSD_SC_SW_Reserve_Tasks_From_Work_Queue.docx

When the Reserve Tasks From Work Queue link is selected from the Manage cluster on the SW User Workspace header, the SW Reserve Tasks from Work Queue pop-up displays allowing the supervisor to reserve tasks from any of the listed Work Queues associated to the user.

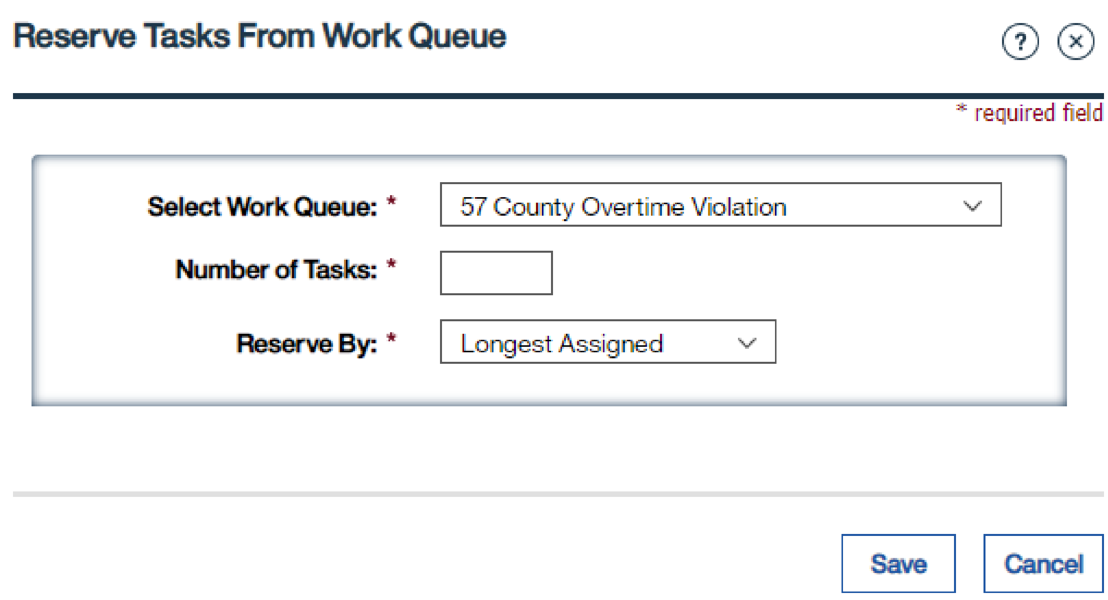


Figure – SW Reserve Tasks From Work Queue

Actions/Functions

The following actions are associated with the SW Reserve Tasks from Work Queue pop-up:

Actions	Function
Save	Saves the Reserve Tasks from Work Queue data and returns the user to the SW User Workspace.
Cancel	Cancels the action and returns the user to the SW User Workspace.

Data Elements

The following data elements are specific to the SW Reserve Tasks from Work Queue pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Select Work Queues	Allows the supervisor to select the Work Queue from which tasks should be reserved to the user.	Drop Down	Yes	Yes, the first Work Queue to which the user is subscribed	Yes
Number of Tasks	Allows the supervisor to designate the number of task which will be reserved to the user.	Number	Yes	No	Yes
Reserve By	Allows the supervisor to select tasks to be reserve based upon either the Longest Assigned or By Priority	Drop Down	Yes	Longest Assigned	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Task Redirection

CI	Document Name
CI-813213 - DSD SC SW Task Redirection IMPLEMENTED	DSD_SC_SW_Task_Redirection.docx

When the Task Redirection link is selected from the Manage cluster on the SW User Workspace, the SW Task Redirection pop-up displays allowing the supervisor to redirect Tasks from the current user to another user. This redirection may be for a set period of time or open ended. The Task Redirection may be set up with a future Start Date.

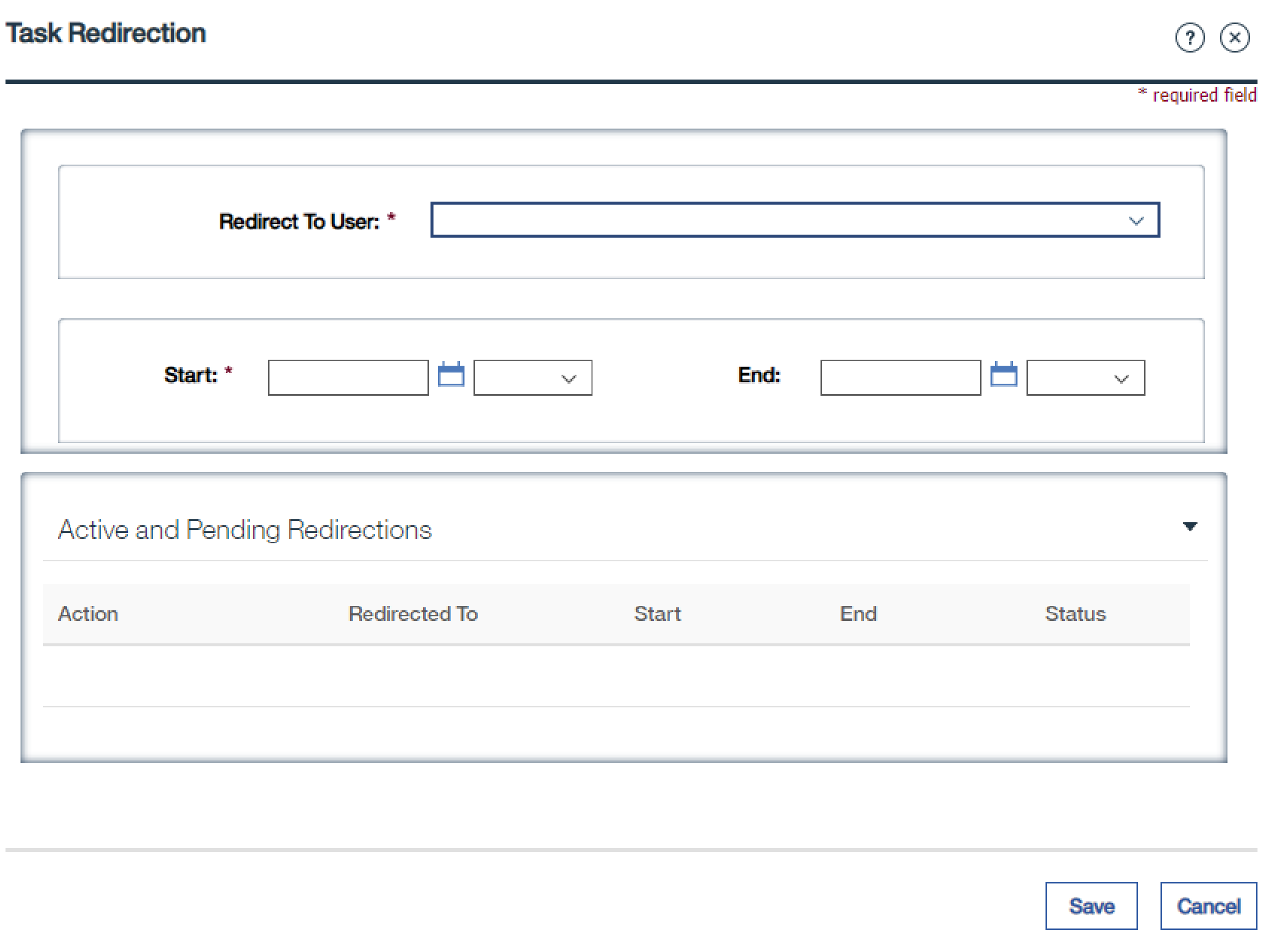


Figure – SW Task Redirection

Actions/Functions

The following actions are associated with the SW Task Redirection pop-up:

Actions	Function
Clear	Displays the SW Clear Task Redirection confirmation pop-up.
Save	Saves the Task Redirection data and returns the user to the SW User Workspace.
Cancel	Cancels the action and returns the user to the SW User Workspace.

Data Elements

The following data elements are specific to the Task Redirection pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
New Task Redirection					
Redirect to User	Allows the Supervisor to select a specific user to whom the user's tasks will be redirected.	Drop-down	Yes	No	Yes
Start	The Start Date and Time of the Task Redirection	Date MM/DD /YYYY	Yes	No	Yes
End	The End Date and Time of the Task Redirection	Date MM/DD /YYYY	No	No	Yes
Active and Pending Redirections					
Redirected To	Allows the selection of a specific user to whom the user's tasks will be redirected.	Sting	No	No	No
Start	The start date and time of the Task Redirection	Date MM/DD /YYYY	Yes	No	No
End	The end date and time of the Task Redirection	Date MM/DD /YYYY	No	No	No
Status	The status of the Task Redirection	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Clear Task Redirection

CI	Document Name
CI-813229 - DSD SC SW Clear Task Redirection IMPLEMENTED	DSD_SC_Clear_Task_Redirection.docx

When the Clear link is selected on the SW Task Redirection pop-up the SW Clear Task Redirection pop-up displays.

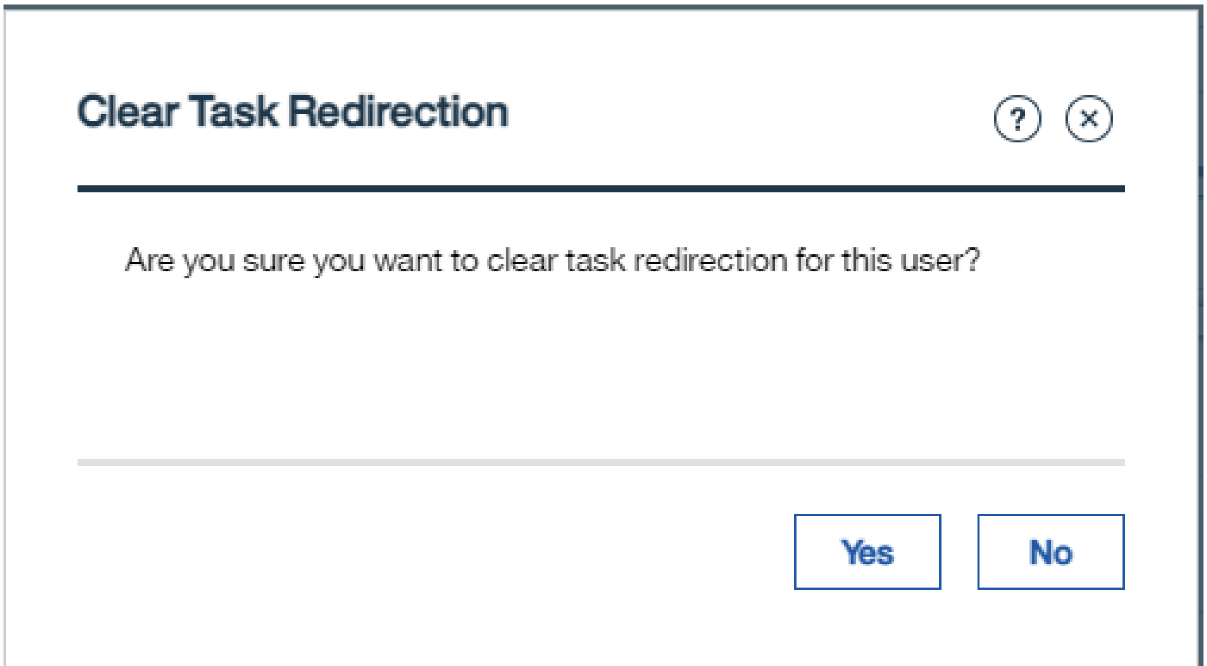


Figure – SW Clear Task Redirection

Actions/Functions

The following actions are associated with the SW Clear Task Redirection pop-up:

Actions	Function
Yes	Displays the SW Task Redirection pop-up.
No	Closes the pop-up and displays the SW Task Redirection pop-up.

Data Elements

There are no data elements associated with the SW Clear Task Redirection pop-up:

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Allocation Blocking

CI	Document Name
CI-813206 - DSD SC SW Allocation Blocking IMPLEMENTED	DSD_SC_SW_Allocation_Blocking.docx

When the Allocation Blocking link is selected from the Manage cluster on the SW User Workspace, the SW Allocation Blocking pop-up displays allowing the supervisor to Block the allocation of tasks to the user.
If the selected start date and time is not in the future, this warning is displayed: "*Please select a start date and time that is in the future.*".
Role Name: PROGRAMMGMTROLE

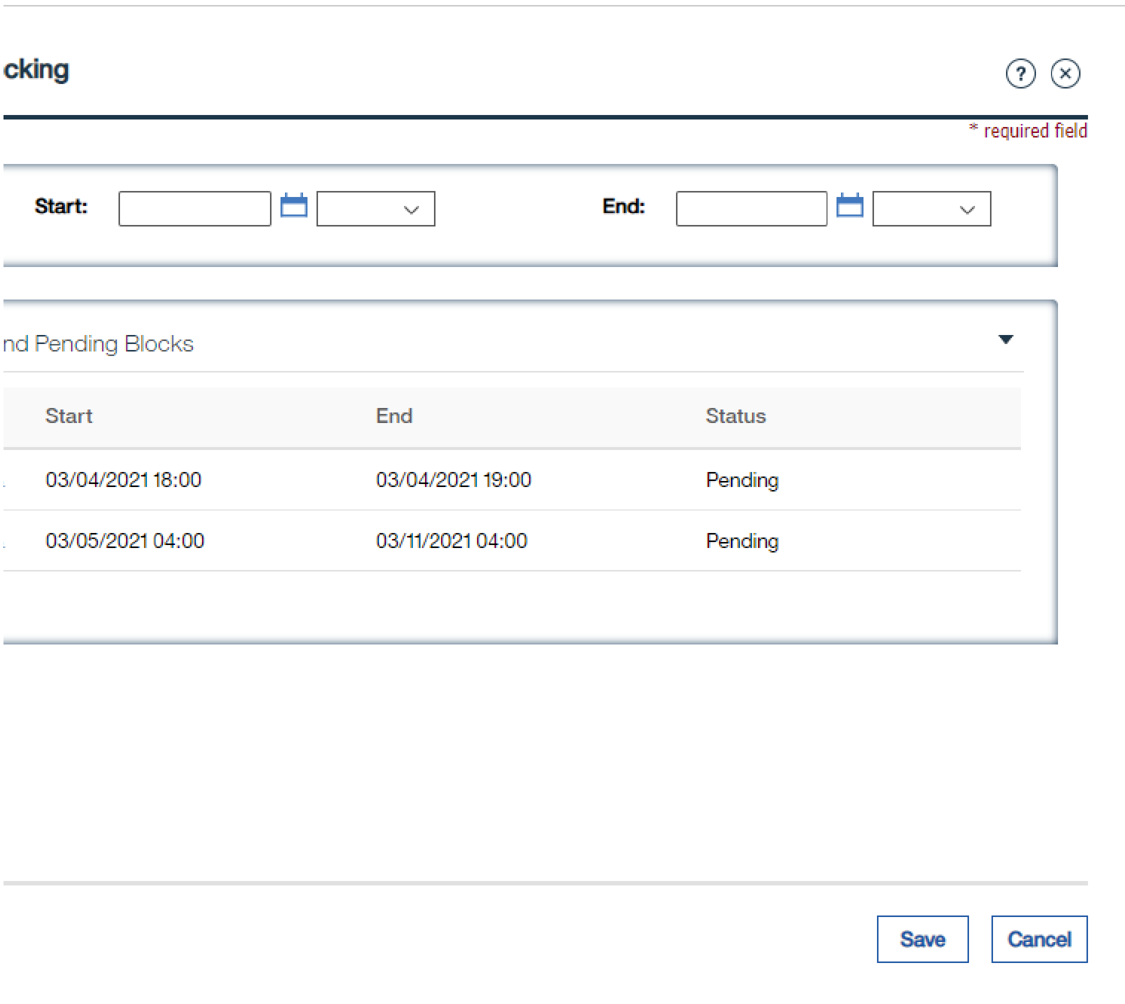


Figure – SW Allocation Blocking

Actions/Functions

The following actions are associated with the SW Allocation Blocking pop-up:

Actions	Function
Save	Saves the Allocation Blocking data and returns the user to the SW User Workspace.
Cancel	Cancels the action and returns the user to the SW User Workspace.
Clear...	Clears task allocation block. It takes the user to Clear Task Allocation Block pop-up.

Data Elements

The following data elements are specific to the SW Allocation Blocking pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Allocation Blocking					
Start	The Start and Time of the Allocation Blocking	Date (MM/DD /YYYY)	Yes	No	No
End	The End Date and Time of the Allocation Blocking	Date (MM/DD /YYYY)	Yes	No	No
Active and Pending Blocks					
Start	The Start and Time of the Active or Pending Allocation Blocking	Date (MM/DD /YYYY)	No	No	No
End	The End Date and Time of the Active or Pending Allocation Blocking	Date (MM/DD /YYYY)	No	No	No
Status	The status of the indicated record	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User ID Management – Leave

CI	Document Name
CI-813221 - DSD SC SW User ID Mgmt Leave IMPLEMENTED	DSD_SC_SW_User_ID_Mgmt_Leave.docx

When the Leave link is selected from the User ID Management – Leave cluster on the SW User Workspace screen, the SW User ID Management – Leave pop-up displays.

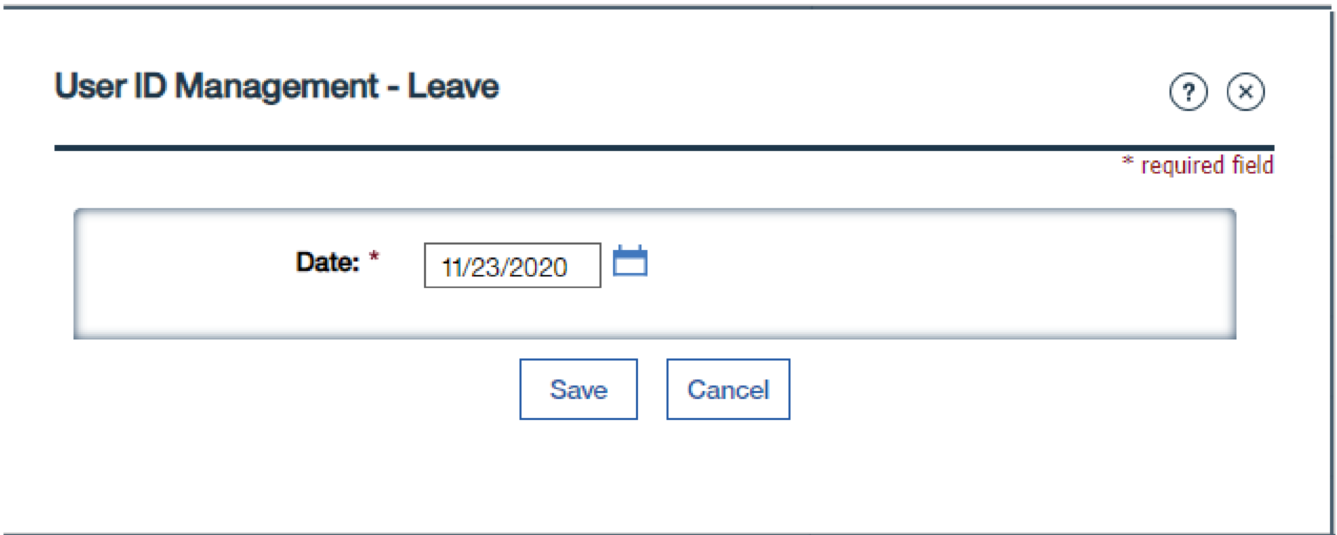


Figure – SW User ID Management – Leave

Actions/Functions

The following actions are associated with the SW User ID Management – Leave pop-up:

Actions	Function
Save	Saves the data and displays the SW User Workspace with a record displayed in the User ID Management – Leave cluster. This record displays an Inactive link and a Date.
Cancel	Dismisses the screen without saving the data and displays the SW User Workspace with a blank User ID Management – Leave cluster.

Data Elements

The following data elements are specific to the SW User ID Management – Leave pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Date	The date the User ID Management – Leave was added	Date MM/DD/YYYY	Yes	Current Date	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User ID Management – End Leave

CI	Document Name
CI-813218 - DSD SC SW User ID Mgmt End Leave IMPLEMENTED	DSD_SC_SW_User_ID_Mgmt_End_Leave.docx

When the End Leave link is selected from the User ID Management – Leave cluster on the SW User Workspace screen, the SW Inactivate User ID Management – Leave pop-up displays.

Figure – SW Inactivate User ID Management - Leave

Actions/Functions

The following actions are associated with the SW User ID Management – Inactivate Leave pop-up:

Actions	Function
Yes	Inactivates the leave record for the user and displays the SW User Workspace screen.
No	Closes the pop-up and displays the SW User Workspace.

Data Elements

There are no data elements associated with the SW User ID Management – Inactivate Leave pop-up.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User ID Management – Exempt User from Deactivation

CI	Document Name
CI-813219 - DSD SC SW User ID Mgmt Exempt from Deactivation IMPLEMENTED	DSD_SC_SW_User_ID_Mgmt_Exempt_from_Deactivation.docx

When the Exemption link is selected from the User ID Management – Deactivation Exemption cluster on the SW User Workspace screen, the SW User ID Management – Deactivation Exemption pop-up displays.

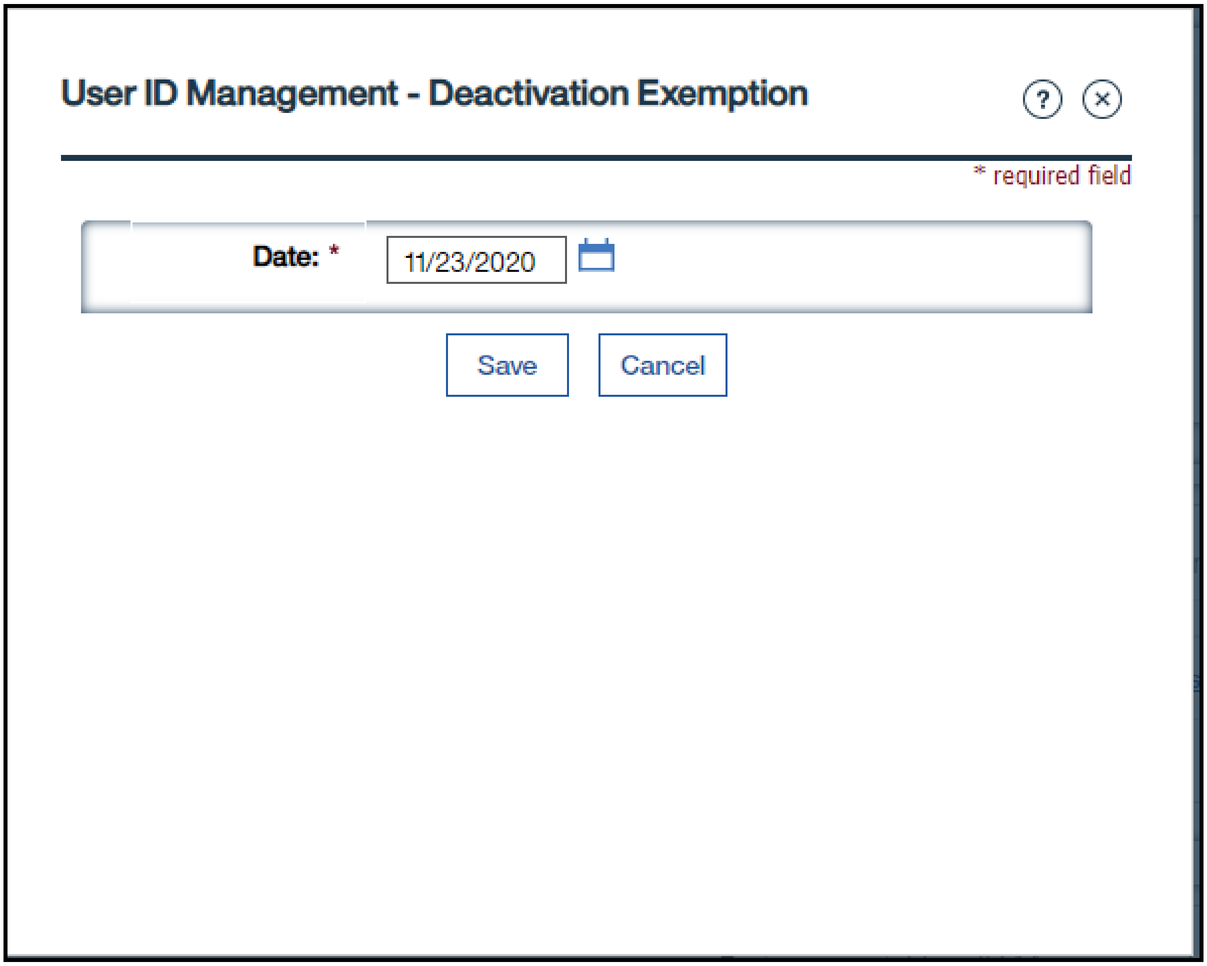


Figure – SW User ID Management – Deactivation Exemption

Actions/Functions

The following actions are associated with the SW User ID Management – Deactivation Exemption pop-up:

Actions	Function
Save	Saves the data and displays the SW User Workspace with a record displayed in the User ID Management – Deactivate Exemption cluster. This record displays an Inactivate link and a Date.
Cancel	Dismisses the screen without saving the data and displays the SW User Workspace with a blank User ID Management – Deactivate Exemption cluster.

Data Elements

The following data elements are specific to the SW User ID Management – Deactivation Exemption pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Date	The date the User ID Management – Deactivation Exemption was added	Date MM/DD /YYYY	Yes	Current Date	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Inactivate User ID Management – Deactivation Exemption

CI	Document Name
CI-813220 - DSD SC SW Inactivate User ID Mgmt Deactivation Exemption IMPLEMENTED	DSD_SC_SW_Inactivate_User_ID_Mgmt_Deactivation_Exemption.docx

When the Remove Exemption link is selected from the User ID Management – Exempt User from Deactivation cluster on the SW User Workspace screen, the SW Inactivate User ID Management – Deactivation Exemption pop-up displays.

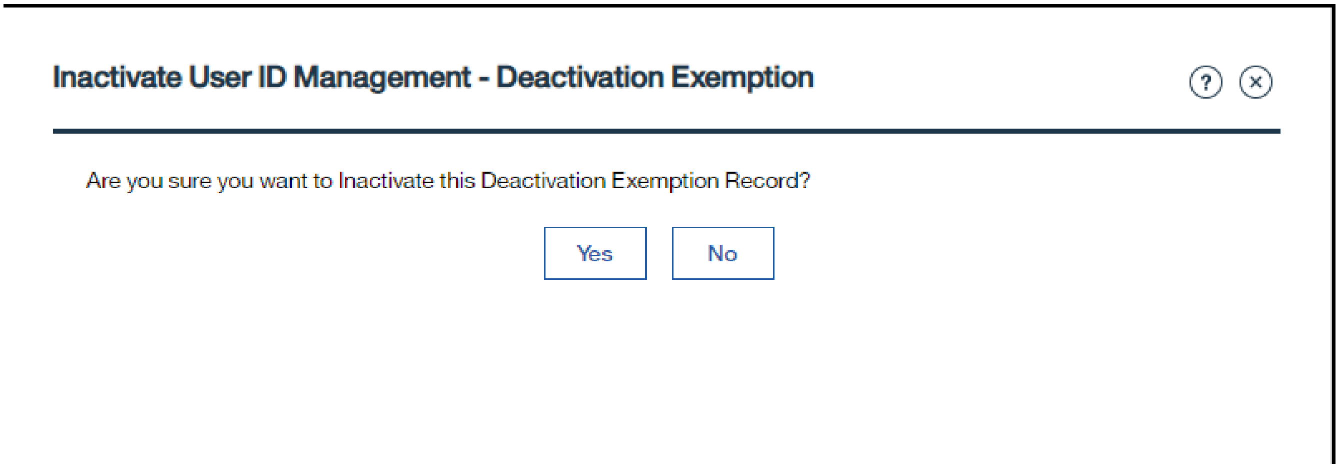


Figure – SW Inactivate User ID Management – Deactivation Exemption

Actions/Functions

The following actions are associated with the SW Inactivate User ID Management – Deactivation Exemption pop-up:

Actions	Function
Yes	Processes the action and displays the SW User Workspace with "Exempt User from Deactivation" in the Action column and date is blank.
No	Closes the pop-up and displays the SW User Workspace

Data Elements

There are no data elements associated with the SW Inactivate User ID Management – Deactivation Exemption pop-up.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Work Queue Workspace

CI	Document Name
CI-813227 - DSD SC SW Work Queue Workspace IMPLEMENTED	DSD_SC_SW_Work_Queue_Workspace.docx

When the Name link is selected from any item from Work Queue Subscribers cluster on a screen a new tab opens and the Work Queue Workspace screen displays allowing the user to view all individuals subscribed to the selected Work Queue.

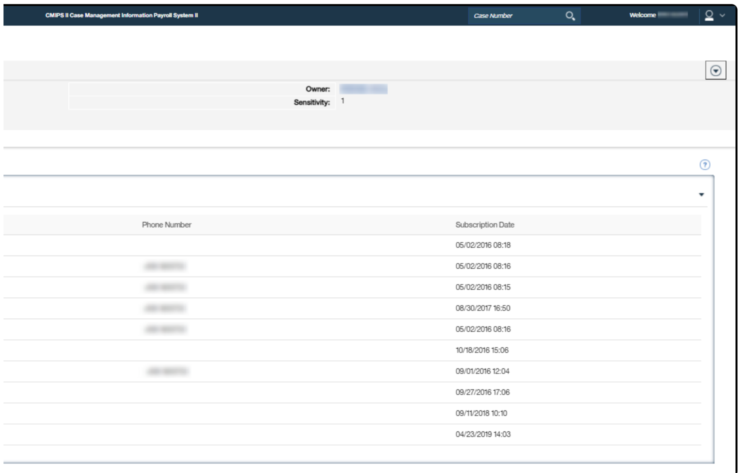


Figure – SW Work Queue Workspace

Hyperlinks/Functions

The following hyperlink functionality is associated with the Work Queue Workspace screen:

Hyperlink	Function
Owner	Displays the User Workspace for the Work Queue Owner.
User Subscribers	
Name	Displays the User Workspace of the user selected.
Email	Launched the user's email application and allows an email to be sent to the selected individual.
Content Tabs	
Home	Displays the Work Queue Workspace home.
Assigned Tasks	Displays the SW Work Queue Workspace - Assigned Tasks screen for the user.
Reserved Tasks	Displays the SW Work Queue Workspace - Reserved Tasks screen for the user.

Data Elements

The following data elements are specific to the Work Queue Workspace screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	The name of the individual assigned to the Work Queue	String	No	No	No
User Subscription Allowed	Indicates whether or not the individual is allowed to subscribe themselves to the work queue.	String	No	No	No

Sensitivity	The sensitivity level of the work queue.	String	No	No	No
User Subscribers					
Phone Number	The phone number of the user subscribed to the work queue includes area code	Number	No	No	No
Subscription Date	The date timestamp the user was subscribed to the work queue	Date Timestamp MM/DD /YYYY HH:MM	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User Assigned Tasks

CI	Document Name
CI-813215 - DSD SC SW User Assigned Task IMPLEMENTED	DSD_SC_SW_User_Assigned_Task.docx

When the Tasks content tab is selected on the SW User Workspace screen or when Assigned Tasks tab is selected from the page navigation, the Assigned Tasks screen displays a list tasks which are assigned to the user.

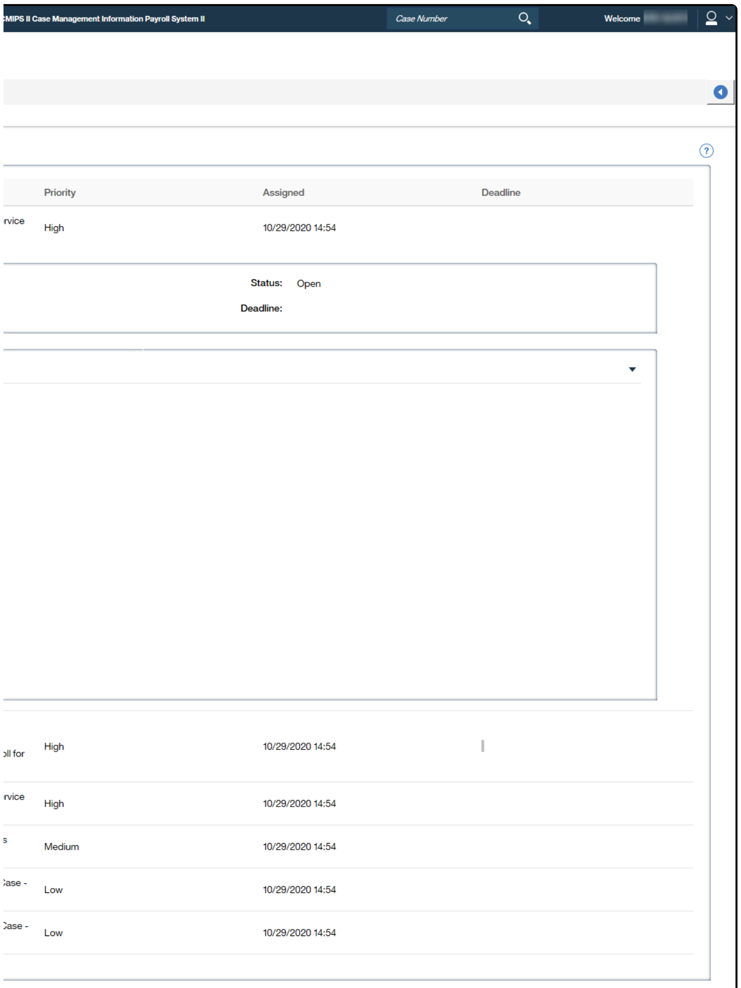


Figure – SW Assigned Tasks

Actions/Functions

The following actions are associated with the Assigned Tasks screen:

Actions	Function
	Expansion toggle for a task when the additional details are collapsed. Selecting this toggle will provide the expanded details for this task.
	Expansion toggle for a task when the additional details are expanded. Selecting this toggle will collapse the details for this task.
Previous	Displays the previous 50 reserved tasks. This action is only displayed when there are previous records to be displayed.

Next	Displays the next group of reserved tasks (up to 50). This action is only displayed when the user has more than 50 tasks.

Data Elements

The following data elements are specific to the Assigned Task screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Task ID	The unique identification number of the listed task	String	No	No	No
Subject	The Task subject	String	No	No	No
Priority	The designate task priority	String	No	No	No
Assigned	The date/time the task was assigned to the user	Date Timestamp MM/DD /YYYY HH:MM	No	No	No
Deadline	If assigned, the deadline after which the Task escalates to the user's supervisor	Date Timestamp MM/DD /YYYY HH:MM	No	No	No
Expanded View					
Reserved by	The user (if any) who has reserved the task	String	No	No	No
Status	Status of the task	String	No	No	No
Time Worked	Time worked on the task in HH:MM format	String	No	No	No
Deadline	Deadline of the task	String	No	No	No
History	History of the task	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User Open Tasks

CI	Document Name
CI-813222 - DSD SC SW User Open Tasks IMPLEMENTED	DSD_SC_SW_User_Open_Tasks.docx

When the Open Tasks page navigation is selected on the SW User Workspace the SW Open Tasks screen displays listing all the open tasks for the user.

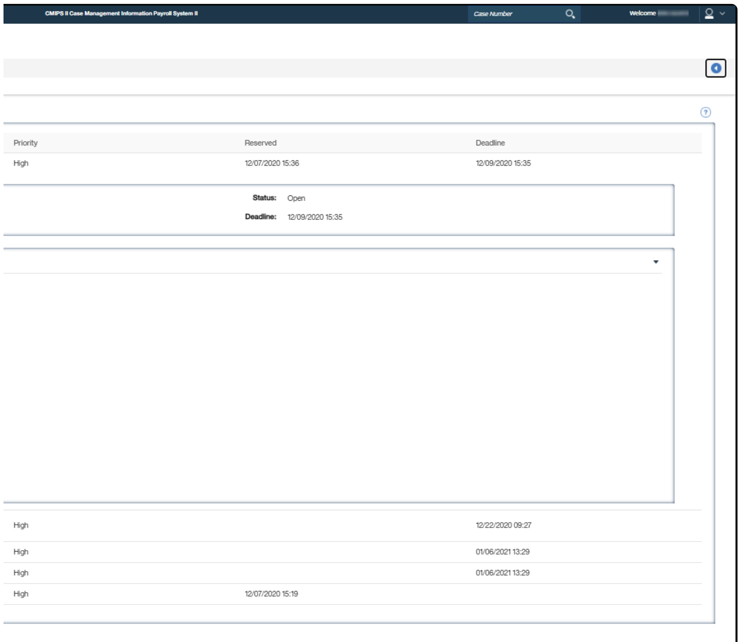


Figure – SW Open Tasks

Actions/Functions

The following actions are associated with the Open Task screen:

Actions	Function
Open Tasks	
	Expansion toggle for a task when the additional details are collapsed. Selecting this toggle will provide the expanded details for this task.
	Expansion toggle for a task when the additional details are expanded. Selecting this toggle will collapse the details for this task.
Previous	Displays the previous 50 reserved tasks. This action is only displayed when there are previous records to be displayed.
Next	Displays the next group of reserved tasks (up to 50). This action is only displayed when the user has more than 50 tasks.

Data Elements

The following data elements are specific to the Open Task screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Open Tasks					

Task ID	The unique identification number associated to the task	String	No	No	No
Subject	The Task subject	String	No	No	No
Priority	The designate task priority	String	No	No	No
Reserved	The date/time the task was reserved	Date Timestamp MM/DD /YYYY HH:MM	No	No	No
Deadline	If assigned, the deadline after which the Task escalates to the user's supervisor	Date Timestamp MM/DD /YYYY HH:MM	No	No	No
Expanded View					
Reserved by	The user (if any) who has reserved the task	String	No	No	No
Status	Status of the task	String	No	No	No
Time Worked	Time worked on the task in HH:MM format	String	No	No	No
Deadline	Deadline of the task	String	No	No	No
History	History of the task	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User Deferred Tasks

CI	Document Name
CI-813217 - DSD SC SW User Deferred Tasks IMPLEMENTED	DSD_SC_SW_User_Deferred_Tasks.docx

When the Deferred Tasks page navigation is selected on the SW User Workspace screen the SW Deferred Tasks screen displays, listing all the deferred tasks for the user.

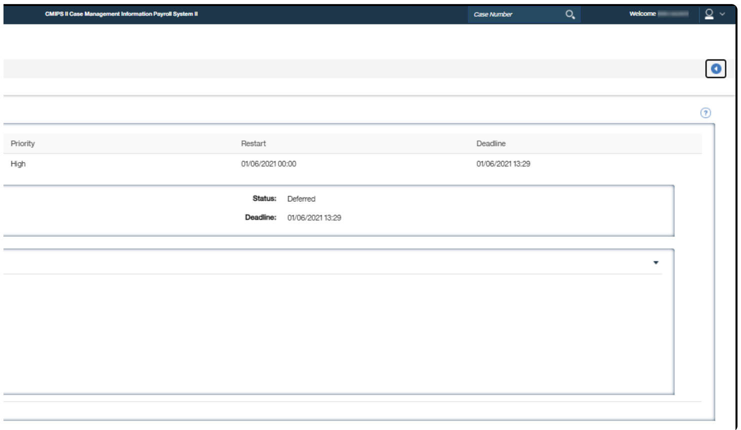


Figure – SW Deferred Tasks

Actions/Functions

The following actions are associated with the SW Deferred Task screen:

Actions	Function
	Expansion toggle for a task when the additional details are collapsed. Selecting this toggle will provide the expanded details for this task.
	Expansion toggle for a task when the additional details are expanded. Selecting this toggle will collapse the details for this task.
Previous	Displays the previous 50 reserved tasks. This action is only displayed when there are previous records to be displayed.
Next	Displays the next group of reserved tasks (up to 50). This action is only displayed when the user has more than 50 tasks.

Data Elements

The following data elements are specific to the SW Deferred Task screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Task ID	The unique identification number associated to the task	String	No	No	No
Subject	The Task subject	String	No	No	No
Priority	The designate task priority	String	No	No	No
Restart	The date/time the task deferment will end	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
Deadline	If assigned, the deadline after which the Task escalates to the user's supervisor	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
Expanded View					

Reserved by	The user (if any) who has reserved the task	String	No	No	No
Status	Status of the task	String	No	No	No
Time Worked	Time worked on the task in HH:MM format	String	No	No	No
Deadline	Deadline of the task	String	No	No	No
History	History of the task	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Redirection History

CI
CI-813223 - DSD SC SW Redirection History IMPLEMENTED

When the Redirection History page navigation is selected on the SW User Workspace screen the SW Redirection History screen displays allowing the supervisor to view a users task redirection history.

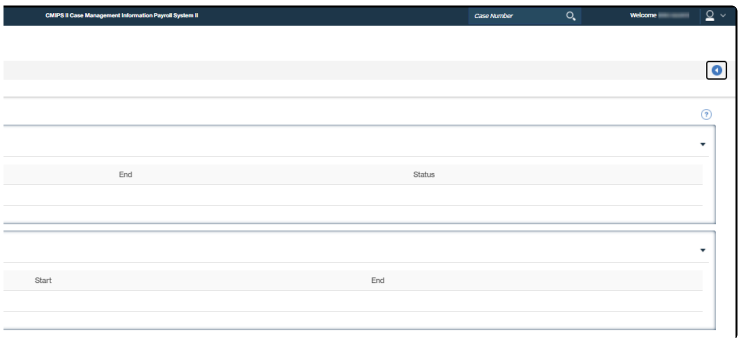


Figure – SW Redirection History

Actions/Functions

The following actions are associated with the SW Redirection History screen:

Hyperlink	Function
Redirected To	Displays the SW User Workspace of the indicated user to whom the task was redirected. The field displays for both Active and Pending Redirections as well as Expired Redirections.

Data Elements

The following data elements are specific to the SW Redirection History screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Active and Pending Redirections					
Start	The Start Date of the active or pending task redirections	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
End	The End Date of the active or pending task redirections	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
Status	The Status (active or pending) of the task redirections	String	No	No	No
Expired Redirections					
Start	The Start Date of the expired task redirections	Date Timestamp MM/DD/YYYY HH:MM	No	No	No
End	The End Date of the expired task redirections	Date Timestamp MM/DD/YYYY HH:MM	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Allocation Blocking History

CI
CI-813214 - DSD SC SW Allocation Blocking History IMPLEMENTED

When the Allocation Blocking History page navigation is selected from SW User Workspace the SW Allocation Blocking History screen displays allowing the supervisor to view a users allocation blocking history.

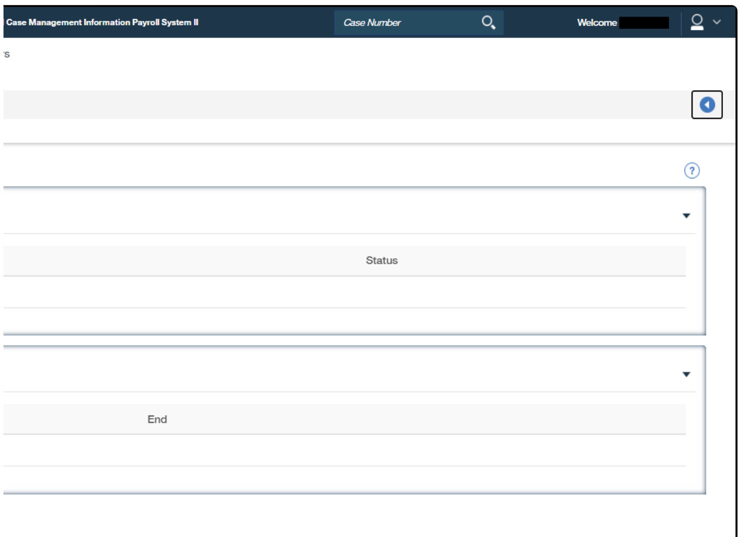


Figure – SW Allocation Blocking History

Actions/Functions

There are no actions associated with the SW Allocation Blocking History screen.

Data Elements

The following data elements are specific to the SW Allocation Blocking History screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Active & Pending Blocks					
Start	The Start Date of the active or pending Allocation Block	Date Timestamp MM/DD/YYYY HH: MM	No	No	No
End	The End Date of the active or pending Allocation Block	Date Timestamp MM/DD/YYYY HH: MM	No	No	No
Status	The Status of the active or pending Allocation Block	String	No	No	No
Expired Blocks					
Start	The Start date and time of the expired allocation block	Date Timestamp MM/DD/YYYY HH: MM	No	No	No
End	The End date and time of the expired allocation block	Date Timestamp MM/DD/YYYY HH: MM	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Cases

CI
CI-813216 - DSD SC SW Cases IMPLEMENTED

When the Cases content tab is selected from the SW User Workspace the SW Cases screen display listing all cases currently assigned to the selected user. Default sort order is Case Number lowest to highest.

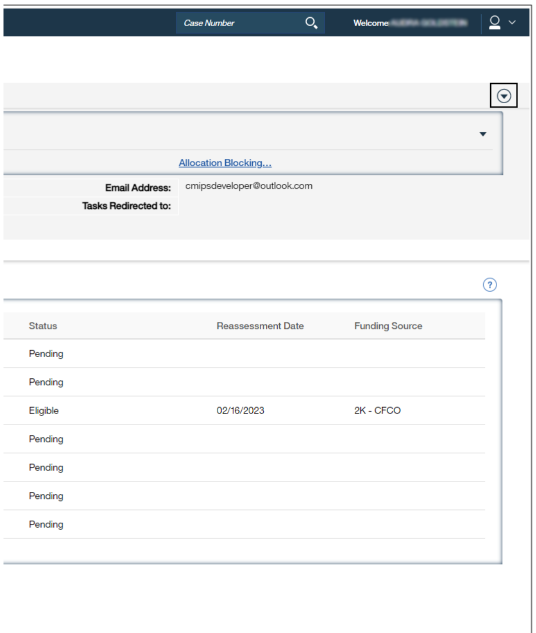


Figure – SW Cases

Actions/Functions

The following actions are associated with the SW Cases screen:

Actions	Function
Case Number	Displays the Case Home, for the selected case, on the My Workspace tab.
Previous	Displays the previous 50 reserved tasks. This link only displays when there are previous records to be displayed.
Next	Displays the next group of reserved tasks (up to 50). This link only displays when the user has more than 50 tasks.

Data Elements User Cases screen:

The following data elements are associated with the SW Cases screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Case Name	The recipient name associated with the case. **Note:** Data under this field is sortable.	String	No	No	No
Authorization Start Date	The current Authorization Start Date. **Note:** Data under this field is sortable.	Date (MM/DD /YYYY)	No	No	No
Status	The current case status. **Note:** Data under this field is sortable.	String	No	No	No

Reassessment Date	Date entered for Re-assessment Due Date. Dates that are prior to the current date display as red text. **Note:** Terminated and ICT-in-progress cases will not display. Data under this field is sortable.	Date (MM /DD /YYYY)	No	No	No
Funding Source	The current Funding Source for the case. **Note:** Terminated and ICT-in-progress cases will not display. Data under this field is sortable.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Work Queues

CI
CI-813224 - DSD SC SW Work Queues IMPLEMENTED

When the Work Queues content tab is selected from the SW User Workspace screen the SW Work Queues screen displays allowing the supervisor to view the Work Queues to which the selected user is subscribed.

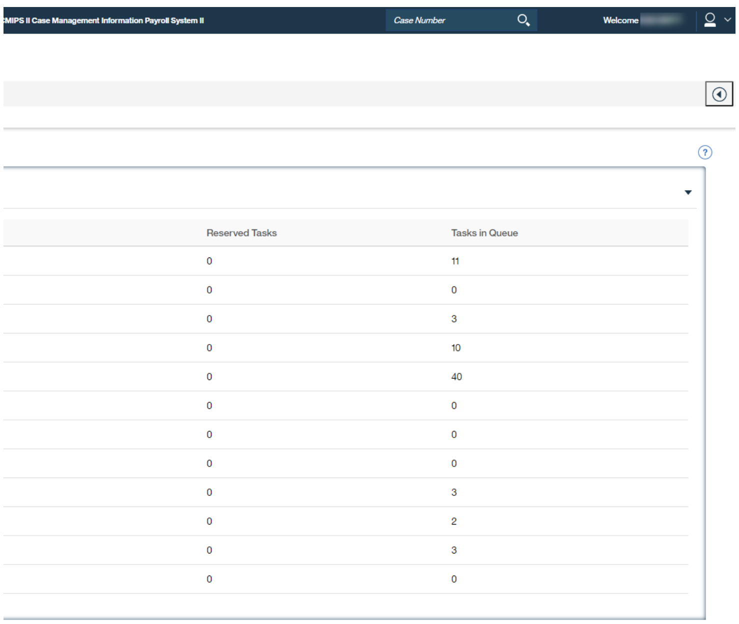


Figure – SW Work Queues

Actions/Functions

The following actions are associated with the SW Work Queues screen:

Actions	Function
Name	Displays the SW Work Queue Workspace of the selected Work Queue.

Data Elements

The following data elements are specific to the SW Work Queues screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Reserved Tasks	The number of tasks reserved from the work queue	Number	No	No	No
Tasks in Queue	The total number of tasks in the work queue	Number	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW My Organization Units

CI	Document Name
CI-813208 - DSD SC SW My Organization Units IMPLEMENTED	DSD_SC_SW_My_Organization_Units.docx

When the My Organization Units link is selected from the expanded Shortcuts panel the SW My Organization Units screen opens a new tab and displays the supervisor organizational unit information.

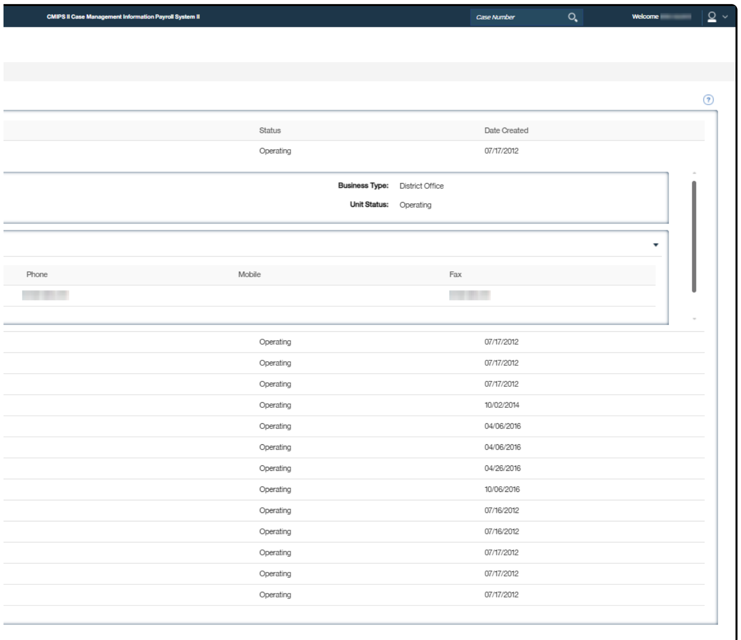


Figure – SW My Organization Units

Actions/Functions

The following actions are associated with the SW My Organization Units screen:

Actions	Function
Name	Displays the Organization Unit Workspace
	Expansion toggle for a unit when the additional details are collapsed. Selecting this toggle will provide the expanded details for this unit.
	Expansion toggle for a unit when the additional details are expanded. Selecting this toggle will collapse the details for this unit.

Data Elements

The following data elements are specific to the SW My Organization Units screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Status	The status of the organization unit	String	No	No	No
Date Created	The date the organization unit was created	Date MM/DD/YYYY	No	No	No
Expanded					
Name	Name of the organization Unit	String	No	No	No

Business Type	Business type of the organization Unit	String	No	No	No
Default Location	Default location of the organization Unit	String	No	No	No
Unit Status	The status of the organization unit	String	No	No	No
Expanded - Users					
Name	Name of the user	String	No	No	No
Email	Email of the user	String	No	No	No
Phone	Phone number + area code of the user	String	No	No	No
Mobile	Mobile phone number + area code of the user	String	No	No	No
Fax	Fax number of the user	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Organization Unit Workspace

CI	Document Name
CI-813210 - DSD SC SW Organization Unit Workspace IMPLEMENTED	DSD_SC_SW_Organization_Unit_Workspace.docx

When the Name link is selected from the My Organization Unit screen the Organization Unit Workspace screen displays listing all the users in the organization unit.

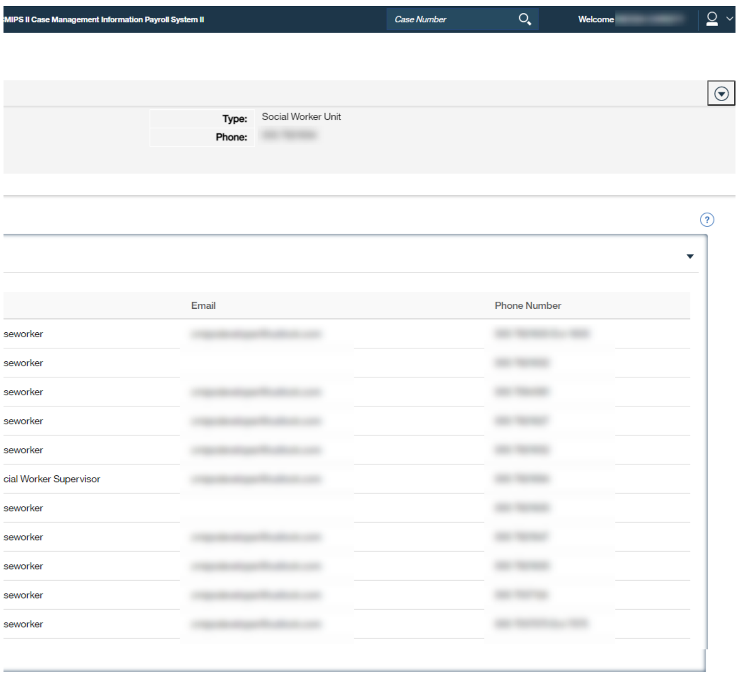


Figure – Organization Unit Workspace

Hyperlinks/Functions

The following hyperlink functionality is associated with the Organization Unit Workspace screen:

Hyperlink	Function
Lead User	Displays the User Workspace of the indicated user
Content Tabs	
Assigned Tasks	Displays the SW Organization Unit Workspace - Assigned Task screen.
Reserved Tasks	Displays the SW Organization Unit Workspace - Reserved Task screen.
Members	
Name	Displays the User Workspace of the selected user

Data Elements

The following data elements are specific to the Organization Unit Workspace screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Name	The organization unit name	String	No	No	No
Type	The organization unit type	String	No	No	No
Phone	The phone number of the lead user includes area code	Number	No	No	No
Members					
Position	The position of the member	String	No	No	No
Email	If indicated, the email address of the member	String	No	No	No
Phone Number	The telephone number of the member includes area code	Number	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Work Queues Subscribed by User

CI	Document Name
CI-813228 - DSD SC SW Work Queues Subscribed By User IMPLEMENTED	DSD_SC_SW_Work_Queues_Subscribed_By_User.docx

When the My Work Queues link is selected from by expanded Shortcuts panel the on the SW - Team and Workloads content tab, the SW Work Queues Subscribed by User screen displays.

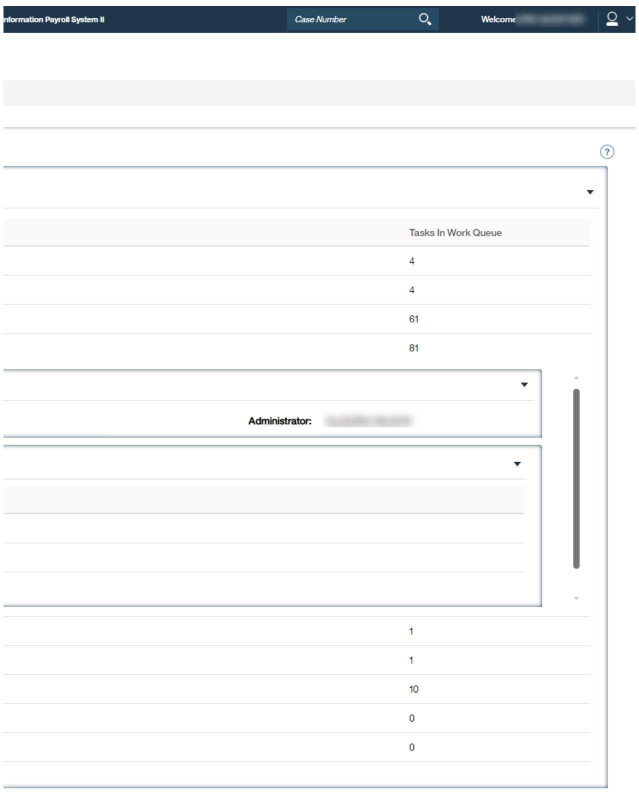


Figure – SW Work Queues Subscribed By Users

Actions/Functions

The following actions are associated with the SW Work Queues Subscribed by User screen:

Actions	Function
	Expansion toggle for a work queue when the additional details are collapsed. Selecting this toggle will provide the expanded details for this work queue.
	Expansion toggle for a work queue when the additional details are expanded. Selecting this toggle will collapse the details for this work queue.
Name	Displays the SW Work Queue Subscribers screen

Data Elements

The following data elements are specific to the SW Work Queues Subscribed by User screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Tasks In Work Queue	Displays the number of tasks Assigned to the Work Queue	Number	No	No	No
Details - This only displays in the expanded view.					
Name	Displays the name of the expanded Work Queue	String	No	No	No
Administrator	Displays the name of the Administrator	String	No	No	No
Subscribers - This only displays in the expanded view.					
Name	Displays the list of user subscribers to the expanded Work Queue	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User Workload

CI	Document Name
CI-813225 - DSD SC SW User Workload IMPLEMENTED	DSD_SC_SW_User_Workload.docx

When the User Workload link is selected from the expanded Shortcuts panel on the SW - Teams and Workloads content tab, a new tab opens and displays the SW User Workload screen. This screen has multiple uses. A supervisor may search for cases associated with a single user, by selecting the user's name from the search field to the right of the "Owner" field. The case Status field allows a search by any CMIPS case status or by all "Active" cases (Pending, Eligible, Presumptive Eligible or Leave status) or "Inactive" (Application Withdrawn, Denied, or Terminated). The supervisor may also search for cases which have "Pending Evidence" when a status of Active, Eligible, Presumptive Eligible, Leave or Pending is indicated.

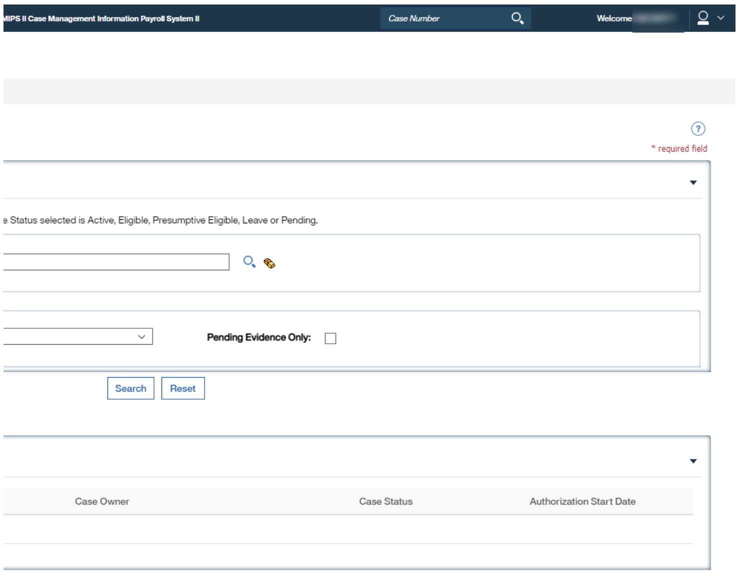


Figure – SW User Workload

Actions/Functions

The following actions are associated with the SW User Workload screen:

Actions	Function
Search Criteria	
Owner (search icon)	Displays the User Search pop-up allow the search and selection of a specific user. See DSD Section 20 for screen definition.
Screen Body	
Search	Performs search based upon the entered Search Criteria
Reset	Resets fields to their default settings
Case Details	
Case Number	Displays the Case Home screen.
Previous	Displays the previous 50 reserved cases. This action is only displayed when there are previous records to be displayed
Next	Displays the next group of cases (up to 50). This action is only displayed when the user has more than 50 cases

Data Elements

The following data elements are specific to the SW User Workload screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Search Criteria The message, 'Please choose a User and Status. "Pending Evidence Only" may only be indicated when the Status selected is Active, Eligible, Presumptive Eligible, Leave or Pending.' always displays as an explanation of how the screen may be used.					
Owner	Allows the selection of an individual case owner or may be left as "User" without the selection of an individual and search for cases meeting other indicated search criteria	Drop-Down	Yes	User	Yes
Status	Allows the selection of a specific case status or Active or Inactive cases.	Drop-Down	No	No	Yes
Pending Evidence	Allows searching for cases with Pending Evidence	Checkbox	Yes, if Owner is "User"	Uncheck	Yes
Search Results					
Case Name	The recipient case name (Last Name, First Name MI)	String	No	No	No
Case Owner	The Case Owner name (First Name Last Name)	String	No	No	No
Case Status	Allows the selection of a Case Status	Drop-Down	No	No	No
Authorization Start Date	The Authorization Start Date of the most recent active evidence on the case	Date MM /DD/YYYY	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Assign Case Categories Requiring Approval

CI
CI-822566 - DSD SC SW Assign Case Categories Requiring Approval IMPLEMENTED

When the Assign Case Categories Requiring Approval button is selected on the SW User Approvals screen, the SW Assign Case Categories Requiring Approval pop-up displays, allowing for a supervisor to select which categories will require supervisor approval for this user.

Figure – SW Assign Case Categories Requiring Approval

Actions/Functions

The following actions are associated with the SW Assign Case Categories Requiring Approval pop-up:

Actions	Function
Save	Saves the Case Categories Requiring Approval data and returns back to the SW User Approvals screen
Cancel	Cancels the action and returns back to the SW User Approvals screen.

Data Elements

The following data elements are specific to the SW Assign Case Categories Requiring Approval pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Accompaniment to Medical Appointments	Indicates whether or not the user requires supervisor approval when submitting a case with Accompaniment to Medical Appointments.	Checkbox	No	No	Yes
Paramedical Services	Indicates whether or not the user requires supervisor approval when submitting a case with Paramedical Services.	Checkbox	No	No	Yes
Protective Supervision	Indicates whether or not the user requires supervisor approval when submitting a case with Protective Supervision.	Checkbox	No	No	Yes
Minor Child Recipient	Indicates whether or not the user requires supervisor approval when submitting a case with Minor Child Recipient.	Checkbox	No	No	Yes
State Hearing Assessment	Indicates whether or not the user requires supervisor approval when submitting a case with State Hearing Assessment.	Checkbox	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User Approvals

CI
CI-822565 - DSD SC SW User Approvals IMPLEMENTED

When the Approvals tab is selected on the SW User Workspace screen, the Approvals tab displays all the assigned case categories requiring approval for this user.

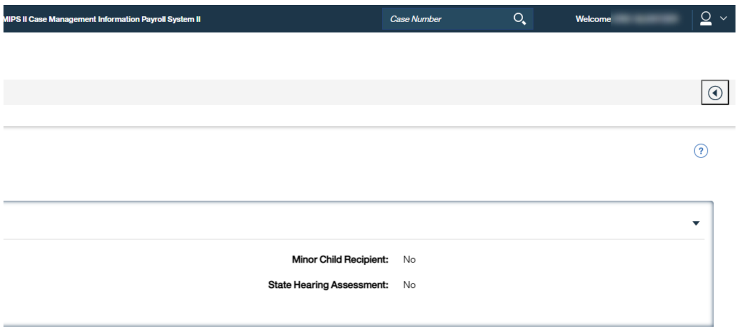


Figure – SW User Approvals

Hyperlinks/Functions

The following hyperlink functionality is associated with the SW User Approvals screen:

Hyperlink	Function
Assign Case Categories Requiring Approval	Displays the SW Assign Case Categories Requiring Approval pop-up.

Data Elements

The following data elements are specific to the SW User Approvals screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Accompaniment to Medical Appointments	Indicates whether or not the user requires supervisor approval when submitting a case with Accompaniment to Medical Appointments.	String	No	No	No
Paramedical Services	Indicates whether or not the user requires supervisor approval when submitting a case with Paramedical Services .	String	No	No	No
Protective Supervision	Indicates whether or not the user requires supervisor approval when submitting a case with Protective Supervision.	String	No	No	No
Minor Child Recipient	Indicates whether or not the user requires supervisor approval when submitting a case with Minor Child Recipient.	String	No	No	No
State Hearing Assessment	Indicates whether or not the user requires supervisor approval when submitting a case with State Hearing Assessment.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW User Workspace Header

CI
CI-822945 - DSD SC SW User Workspace Header IMPLEMENTED

The SW User Workspace Header is a collapsible section that displays at the top of every non-popup screen while viewing user details within the Supervisor Workspace. The header displays beneath the user's open tab, but above the content tabs.

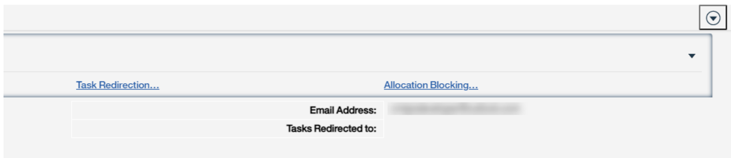


Figure – SW User Workspace Header

Actions/Functions

The following actions/functions are associated with the SW User Workspace Header:

Hyperlink	Function
Manage	
Reserve Assigned Tasks	Displays the Reserve Assigned Tasks pop-up.
Reserve Tasks from Work Queue	Displays the Reserve Tasks from Work Queue pop-up.
Task Redirection	Displays the Task Redirection pop-up.
Allocation Blocking	Displays the Allocation Blocking pop-up.
Header Body	
Tasks Redirected to: <User's Name>	Displays User Details for the individual to whom the user's task are currently being redirected.

Data Elements

The following data elements are associated with the SW User Workspace Header:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	The name of the user the supervisor is viewing.	String	No	No	No
Email Address	If indicated, the email address of the user the supervisor is viewing.	String	No	No	No
Phone Number	The phone number of the user the supervisor is viewing. **Note:** This includes the area code	String	No	No	No
Available for Task Redirection	Indicates whether or not the user is available to have tasks redirected to them.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Clear Task Allocation Block

CI
CI-822996 - DSD SC SW Clear Task Allocation Block IMPLEMENTED

When the Clear link is selected on the SW Allocation Blocking pop-up, the SW Clear Task Allocation Block pop-up displays.

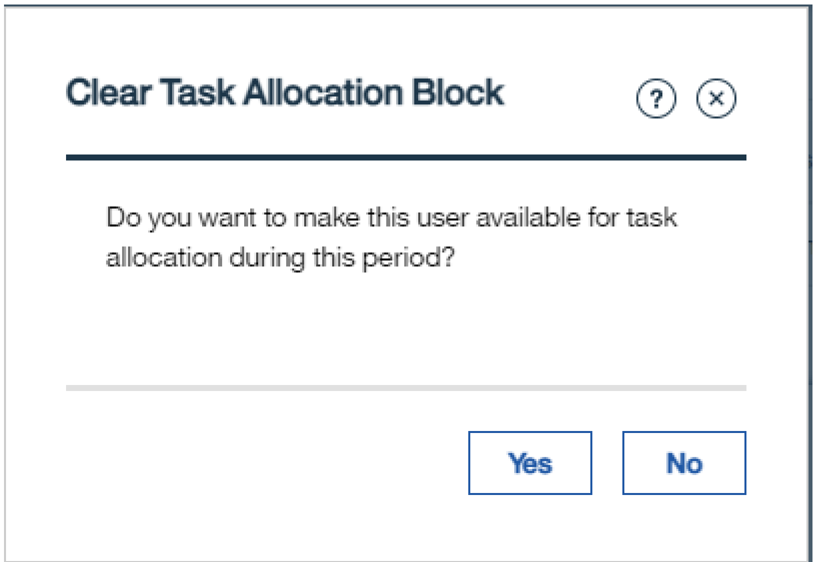


Figure – SW Clear Task Allocation Block

Actions/Functions

The following actions are associated with the SW Clear Task Allocation Block pop-up:

Actions	Function
Yes	Clears the task allocation block, and displays the SW Allocation Blocking pop-up.
No	Closes the pop-up and displays the SW Allocation Blocking pop-up.

Data Elements

There are no data elements associated with the SW Clear Task Allocation Block pop-up.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Work Queue Workspace - Assigned Tasks

CI
CI-822985 - DSD SC SW Work Queue Workspace Assigned Tasks IMPLEMENTED

When the Assigned Tasks tab is selected on the SW Work Queue Workspace, the SW Work Queue Workspace - Assigned Tasks screen displays.

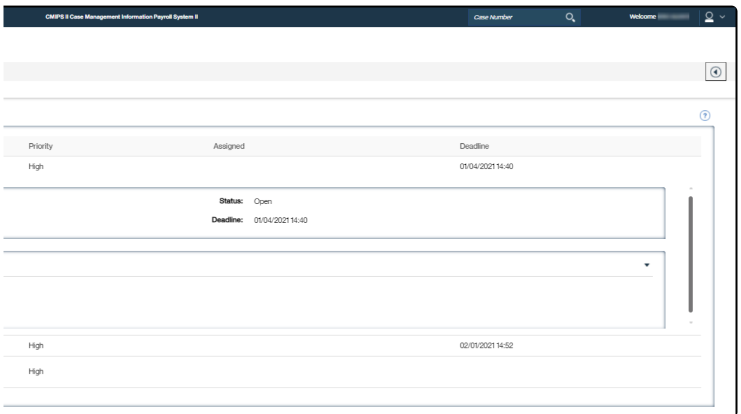


Figure – SW Work Queue Workspace - Assigned Tasks

Hyperlinks/Functions

The following hyperlink functionality is associated with the SW Work Queue Workspace - Assigned Tasks screen:

Hyperlink	Function
Content Tabs	
Home	Displays the Work Queue Workspace home.
Reserved Tasks	Displays the SW Work Queue Workspace - Reserved Tasks screen for the user.

Data Elements

The following data elements are specific to the SW Work Queue Workspace - Assigned Tasks screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Task ID	The task's ID	Number	No	No	No
Subject	Description of the task	String	No	No	No
Priority	The priority of the task	String	No	No	No
Assigned	The date & time the task was assigned	Date Time	No	No	No
Deadline	The date & time the task is due	Date Time	No	No	No
Expanded View					
Reserved By	User who reserved the task	String	No	No	No
Status	The status of the task	String	No	No	No
Time Worked	How much time has been logged for the task	String (HH:MM)	No	No	No
Deadline	The date & time the task is due	Date Time	No	No	No

History	A historical breakdown of the task.	String	No	No	No

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Work Queue Workspace - Reserved Tasks

CI
CI-822986 - DSD SC SW Work Queue Workspace Reserved Tasks IMPLEMENTED

Blank Screen

Due to changes in Adobe Flash Player Software, the reserved task graph no longer displays on this screen. The screen is intentionally left blank.

When the Reserved Tasks tab is selected on the SW Work Queue Workspace, the SW Work Queue Workspace - Reserved Tasks screen displays.

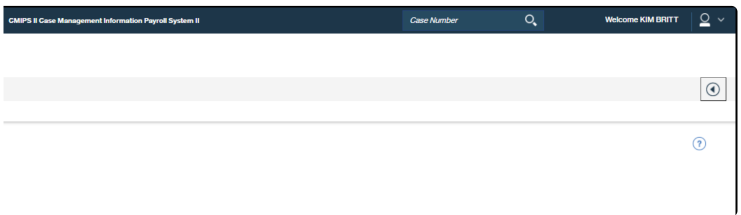


Figure – SW Work Queue Workspace - Reserved Tasks

Hyperlinks/Functions

The following hyperlink functionality is associated with the SW Work Queue Workspace - Reserved Tasks screen:

Hyperlink	Function
Content Tabs	
Home	Displays the Work Queue Workspace home.
Assigned Tasks	Displays the SW Work Queue Workspace - Assigned Tasks screen for the user.

Data Elements

There are no data elements associated with the SW Work Queue Workspace - Reserved Tasks screen.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Organization Unit Workspace - Assigned Tasks

CI
CI-822987 - DSD SC SW Organization Unit Workspace Assigned Tasks IMPLEMENTED

Blank Screen

Due to changes in Adobe Flash Player Software, the assigned task graph no longer displays on this screen. The screen is intentionally left blank.

When the Assigned Tasks tab is selected on the SW Organization Unit Workspace, the SW Organization Unit Workspace - Assigned Tasks screen displays.

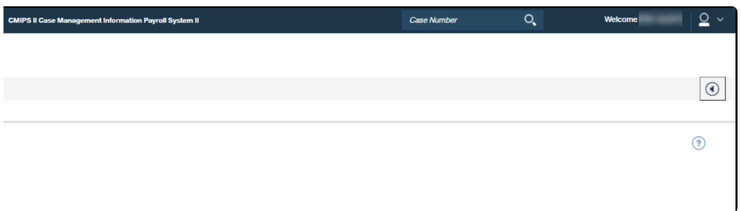


Figure – SW Organization Unit Workspace - Assigned Tasks

Hyperlinks/Functions

The following hyperlink functionality is associated with the SW Organization Unit Workspace - Assigned Tasks screen:

Hyperlink	Function
Content Tabs	
Home	Displays the SW Organization Unit Workspace home.
Reserved Tasks	Displays the SW Organization Unit Workspace - Reserved Tasks screen for the user.

Data Elements

There are no data elements associated with the SW Organization Unit Workspace - Assigned Tasks screen.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/SW Organization Unit Workspace - Reserved Tasks

CI
CI-822988 - DSD SC SW Organization Unit Workspace Reserved Tasks IMPLEMENTED

Blank Screen

Due to changes in Adobe Flash Player Software, the reserved task graph no longer displays on this screen. The screen is intentionally left blank.

When the Reserved Tasks tab is selected on the SW Organization Unit Workspace, the SW Organization Unit Workspace - Reserved Tasks screen displays.

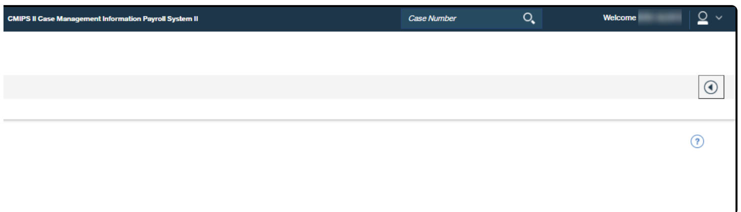


Figure – SW Organization Unit Workspace - Reserved Tasks

Hyperlinks/Functions

The following hyperlink functionality is associated with the SW Organization Unit Workspace - Reserved Tasks screen:

Hyperlink	Function
Content Tabs	
Home	Displays the SW Organization Unit Workspace home.
Assigned Tasks	Displays the SW Organization Unit Workspace - Assigned Tasks screen for the user.

Data Elements

There are no data elements associated with the SW Organization Unit Workspace - Reserved Tasks screen.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/Delete User Pop-up

CI
CI-823058 - DSD SC Delete User Pop-up IMPLEMENTED

The Delete User pop-up displays when a County SysAdmin user on the User Home screen selects the inactivate user hyperlink. It allows the County SysAdmin user to delete a user that is inactive.

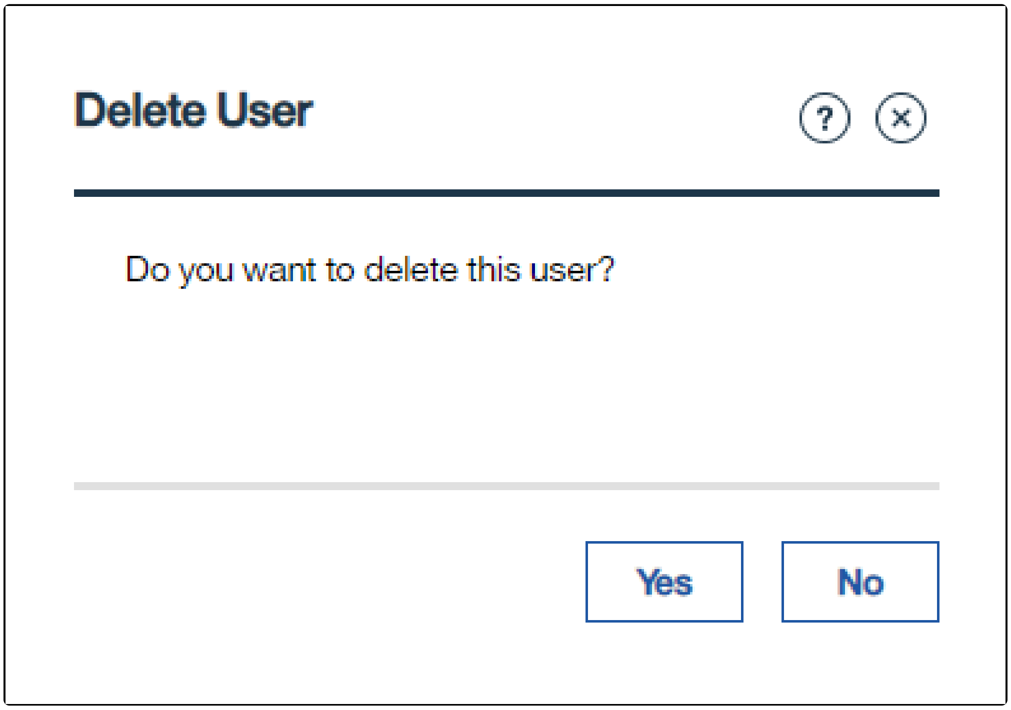


Figure – Delete User

Actions/Functions

The following actions are associated with the Delete User pop-up:

Actions	Function
Yes	The pop-up closes and the user is deleted. **Note:** If CMIPS identifies the user has an Open Task and/or Open Notification, an information notification will display and update the Yes button to a Continue button.
No	The pop-up closes and the user is not deleted. Returns the user to My Workspace screen.

Data Elements

There are no data elements specific to the Delete User Pop-Up screen.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/CMIPS Services Portal Screen: Two-Step Verification Contact Information

CI
CI-823604 - DSD SC CMIPS Services Portal Access Screen IMPLEMENTED

When the CSP Access link is selected from the My Shortcuts section of the My Workspace screen, the CMIPS Services Portal Screen: Two-Step Verification Contact Information screen displays in a new tab and allows the user to view and edit their contact information. The screen has a Cell Phone Number cluster and an Email Address cluster. The user may enter either or both cell phone number and email address for two-step verification related to CSP access outside of their respective county network. If both are entered, the user may specify by which method to send the code by selecting the Edit button on the respective method cluster.

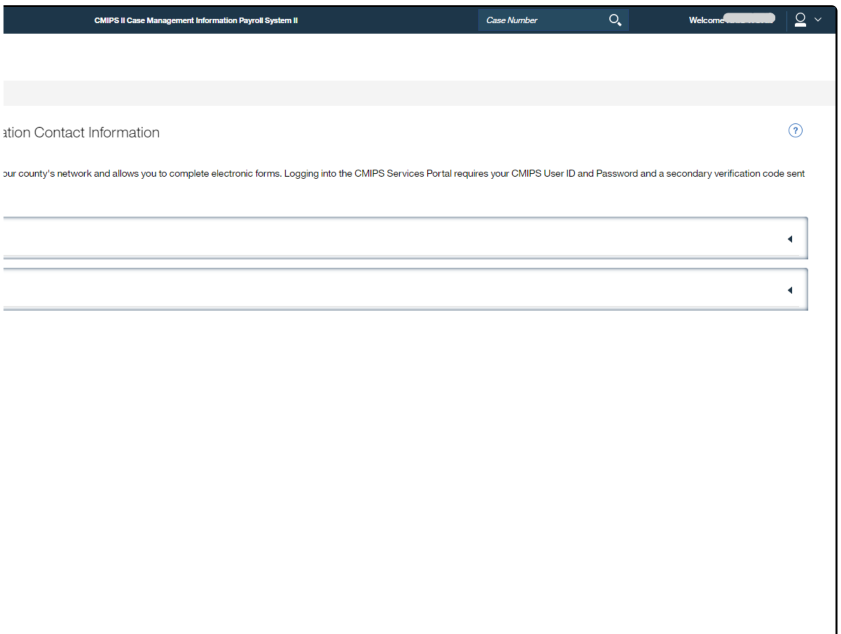


Figure – CSP Access - Collapsed Clusters

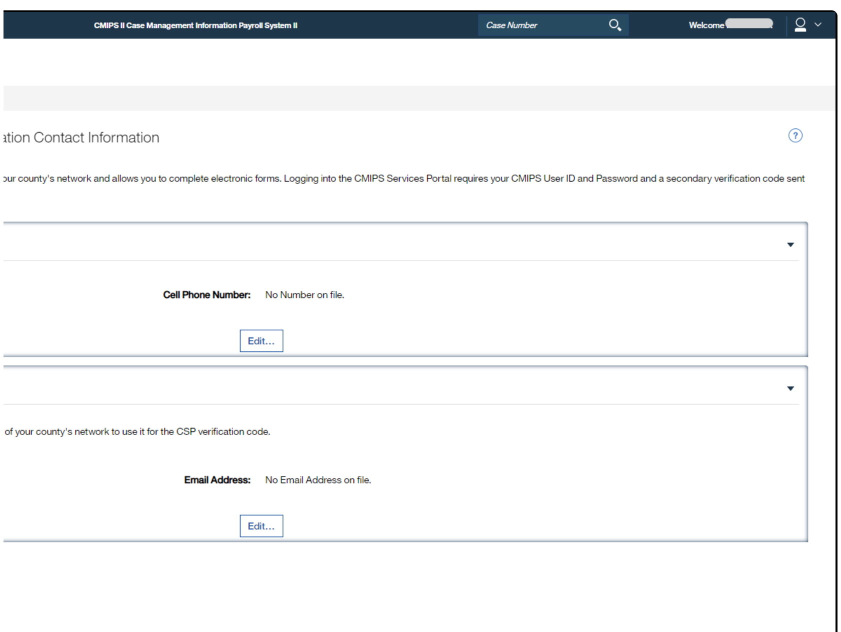


Figure – CSP Access - Expanded Clusters - No Information Entered

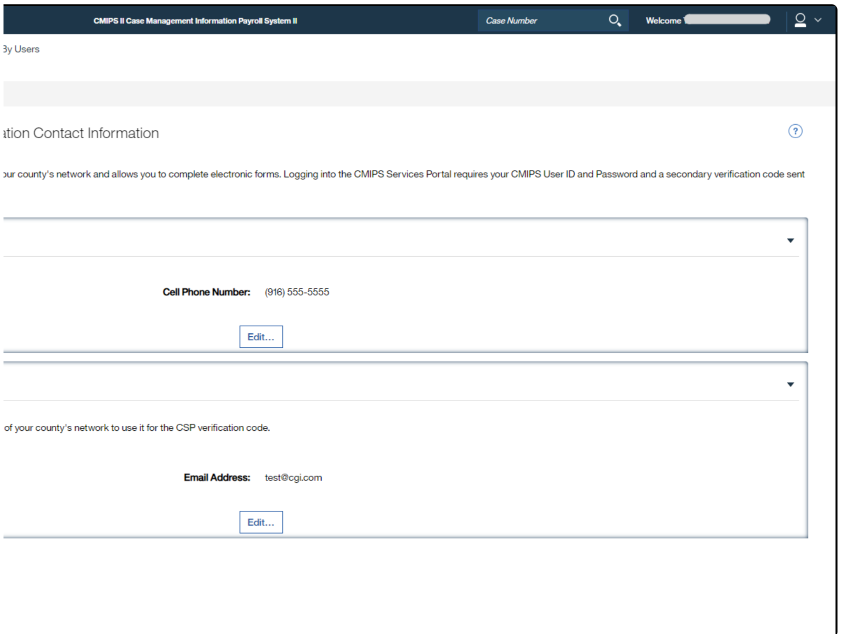


Figure – CSP Access - Expanded Clusters - Contact Information Entered

Static Text:

The following static text is associated with the CMIPS Service Portal: Two-Step Verification Contact Information screen:

Text
The CMIPS Service Portal (CSP) can be accessed from outside of your county's network and allows you to complete electronic forms. Logging into the CMIPS Services Portal requires your CMIPS User ID and Password and a secondary verification code sent to the email address or phone number entered below.
No Number on file. **Note:** This displays only if no Two-Step Verification cell phone number has been entered by the user.
You will need to be able to access your email address outside of your county's network to use it for the CSP verification code.
No Email Address on file. **Note:** This displays only if no Two-Step Verification email has been entered by the user.

Actions/Functions

The following actions are associated with the Two-Step Verification Contact Information screen:

Actions	Function
Two-Step Verification Contact Information	
	Expands the cluster.
	Collapses the cluster.
Edit...	Opens the Send Verification Code pop-up.

Data Elements

There are no data elements associated with the Two-Step Verification Contact Information screen.

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/CSP 2FA - Enter Verification Code - Phone Number

CI
CI-823656 - DSD SC CSP 2FA - Enter Verification Code - Phone Number IMPLEMENTED

The Enter Verification Code screen displays when a county user selects the Send Verification Code button on the Send Verification Code - Phone Number screen. This screen allows the user to verify their phone number by entering the code they received or resend the code if it expired or was not received.

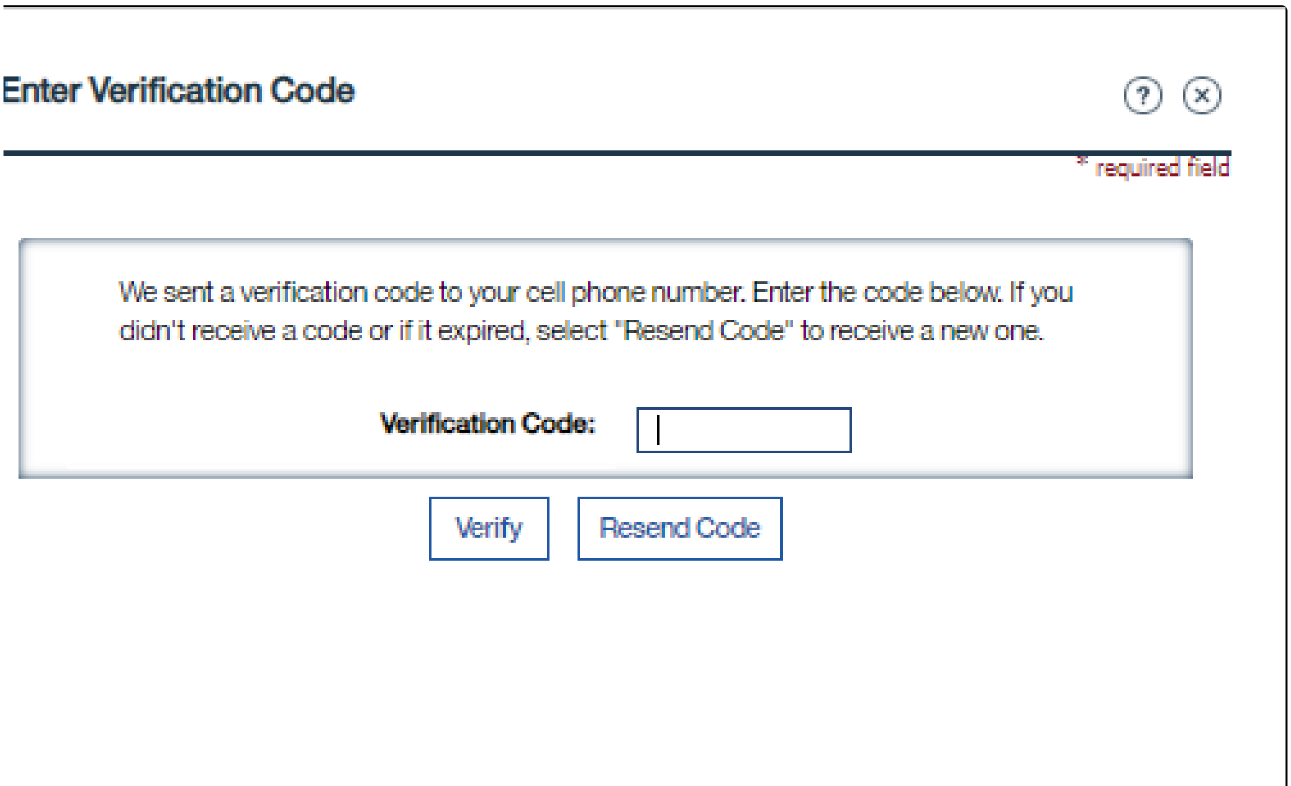


Figure – Enter Verification Code

Static Text:

The following static text is associated with the Enter Verification Code - Phone Number screen:

Text
We sent a verification code to your cell phone number. Enter the code below. If you didn't receive a code or if it expired, select "Resend Code" to receive a new one.

Actions/Functions

The following actions are associated with the Enter Verification Code - Phone Number screen:

Actions	Function
Verify	Verifies the phone number and returns the user to the CMIPS Services Portal Access screen.

Resend Code	Resends the verification code to the cell phone number previously entered by the user.

Data Elements

The following data elements are associated with the Enter Verification Code - Phone Number screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Verification Code	The verification code sent to the phone number entered by the user.	String	No	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/CSP 2FA - Send Verification Code - Phone Number

CI
CI-823655 - DSD SC CSP 2FA - Send Verification Code - Phone Number IMPLEMENTED

The Send Verification Code displays when a county user selects the Edit... button in the Cell Phone Number cluster of the CMIPS Services Portal Access: Two-Step Verification Contact Information screen in Case Management.

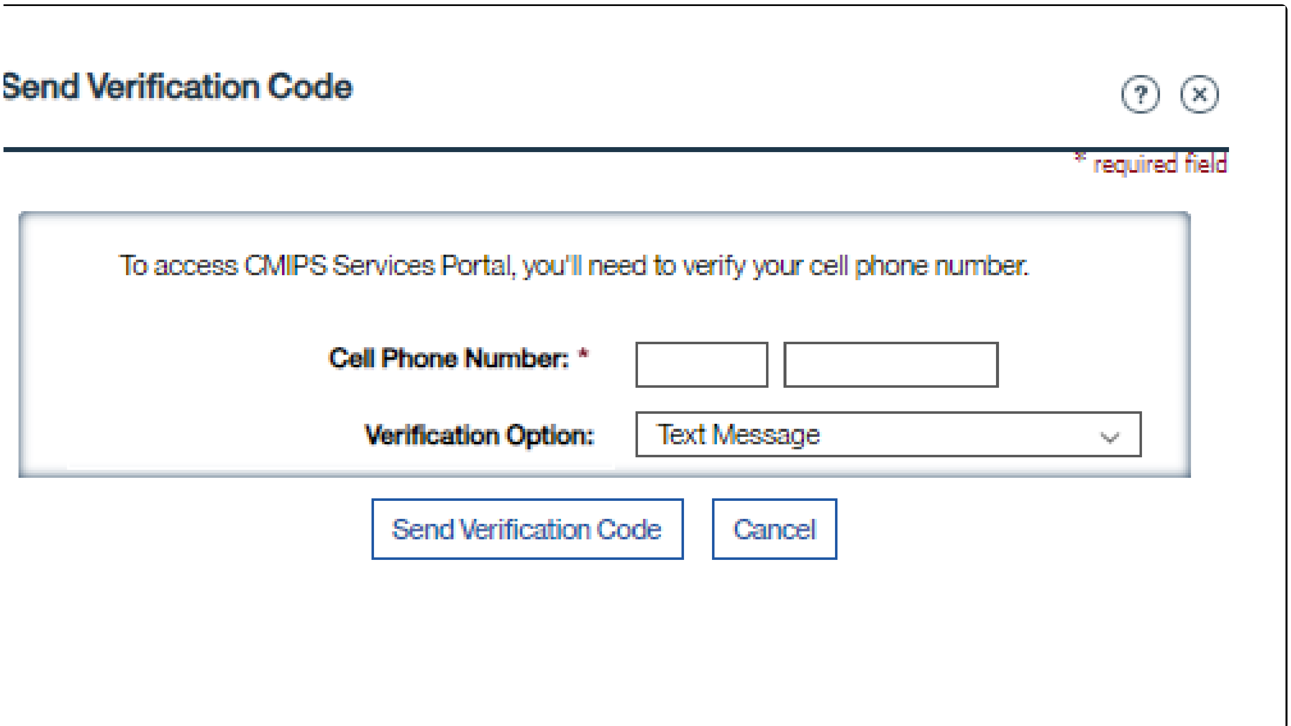


Figure – Send Verification Code

Static Text:

The following static text is associated with the Send Verification Code - Phone Number screen:

Text
To access CMIPS Services Portal, you'll need to verify your cell phone number.

Actions/Functions

The following actions are associated with the Send Verification Code - Phone Number screen:

Actions	Function
Send Verification Code	Sends the verification code to the cell phone number entered and directs the user to the Enter Verification Code screen.
Cancel	Returns the user to the CMIPS Services Portal Access Screen.

Data Elements

The following data elements are associated with the Send Verification Code - Phone Number screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Cell Phone Number	The two-step verification phone number entered by the user.	String	Yes	Blank	Yes
Verification Option	Selecting the Text Message option will generate a verification text message to the user's phone number. Selecting the Voice Call option will generate a verification voice call to the user's phone number.	Dropdown	No	Text Message	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/CSP 2FA - Send Verification Code - Email Address

CI
CI-823659 - DSD SC CSP 2FA - Send Verification Code - Email Address IMPLEMENTED

The Send Verification Code displays when a county user selects the Edit... button in the Email Address cluster of the CMIPS Services Portal Access: Two-Step Verification Contact Information screen in Case Management.

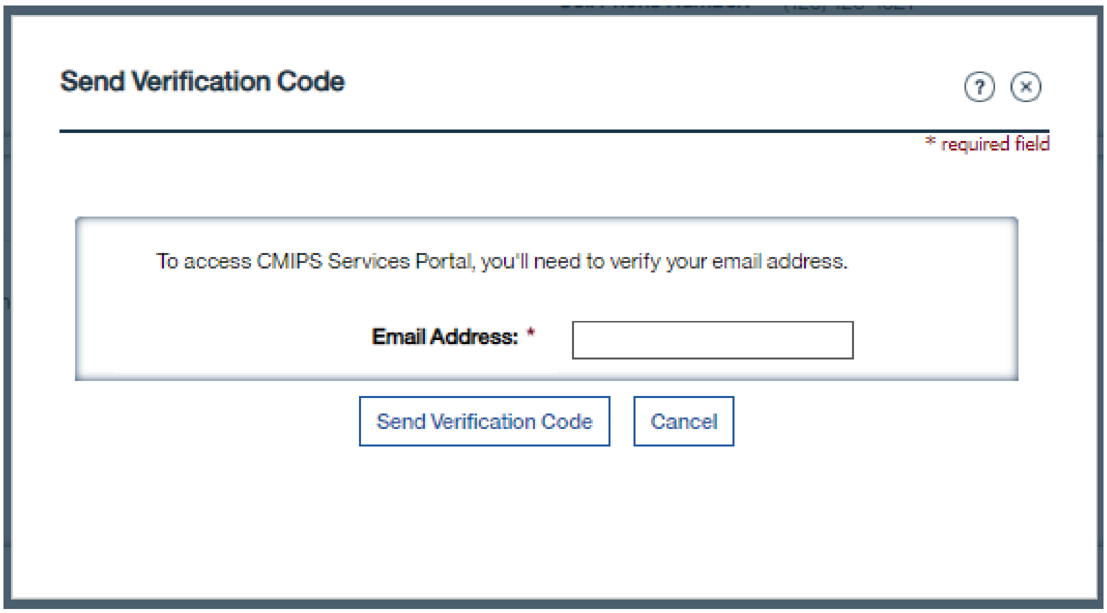


Figure – Send Verification Code

Static Text:

The following static text is associated with the Send Verification Code - Email Address screen:

Text
To access CMIPS Services Portal, you'll need to verify your email address.

Actions/Functions

The following actions are associated with the Send Verification Code - Email Address screen:

Actions	Function
Send Verification Code	Sends the verification code to the email address entered and directs the user to the Enter Verification Code screen.
Cancel	Returns the user to the CMIPS Service Portal Access Screen.

Data Elements

The following data elements are associated with the Send Verification Code - Email Address screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Email Address	The two-step verification email address entered by the user.	String	Yes	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Screen Designs/CSP 2FA - Enter Verification Code - Email Address

CI
CI-823660 - DSD SC CSP 2FA - Enter Verification Code - Email Address IMPLEMENTED

The Enter Verification Code displays when a county user selects the Send Verification Code button on the Send Verification Code - Email Address screen and allows the user to verify their email address by entering the code they received or resend the code if it expired or was not received.

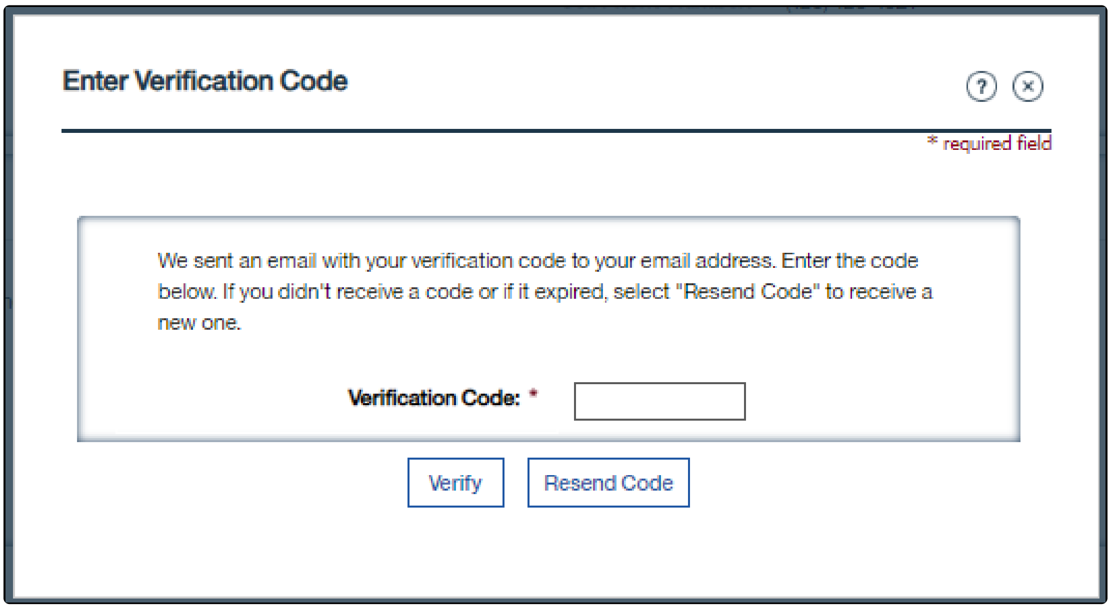


Figure – Enter Verification Code - Initial

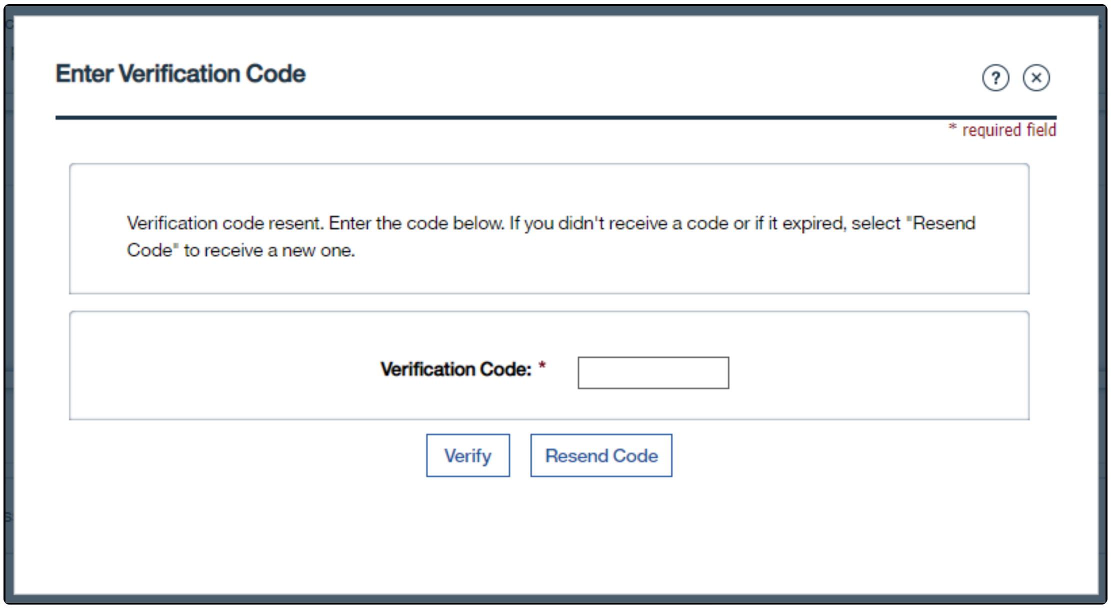


Figure – Enter Verification Code - Code Resent

Static Text:

The following static text is associated with the Enter Verification Code - Email Address screen:

Initial	We sent an email with your verification code to your email address. Enter the code below. If you didn't receive a code or if it expired, select "Resend Code" to receive a new one.
Code Resent	Verification code resent. Enter the code below. If you didn't receive a code or if it expired, select "Resend Code" to receive a new one.

Actions/Functions

The following actions are associated with the Enter Verification Code - Email Address screen:

Actions	Function
Verify	Verifies the email address and returns the user to the CMIPS Services Portal Access screen.
Resend Code	Resends the verification code to the email address previously entered by the user and updates the Enter Verification Code screen's static text.

Data Elements

The following data elements are associated with the Enter Verification Code - Phone Number screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Verification Code	The verification code sent to the email address entered by the user.	String	Yes	No	Yes

DSD 26/Recip CM & OS – Program Management, Fraud /Navigation Elements

See DSD Section 20 for all CMIPS Navigation elements.

DSD 26/Recip CM & OS – Program Management, Fraud /Error Messages

This section will define the validation edits on the screens and will document the errors messages that will be displayed for each edit.

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
1	12345	CI-112430 - DSD EM PGM 01 IMPLEMENTED	Task Search	When task ID and case number or task ID and case are entered.	Do not allow the action	The data in this screen will not be processed and the following message appears: Case Number or Case is not allowed if a Task ID has been entered.
2	12345	CI-112419 - DSD EM PGM 02 IMPLEMENTED	Task Search	When case number and case are entered.	Do not allow the action	The data in this screen will not be processed and the following message appears: Case is not allowed if a Case Number has been entered.
3	12347	CI-112415 - DSD EM PGM 03 IMPLEMENTED	Task Search	When there are more than 50 tasks associated with the Task Search.	Display the most recent 50 tasks	The list will display the most recent 50 tasks and the following message appears: More than 50 Tasks found. To view more tasks, select Tasks from the Case Home screen.
4	12650	CI-112447 - DSD EM PGM 04 IMPLEMENTED	Case Search	When only the first name is entered and the Search link is selected.	Do not allow the action	The data in this screen will not be processed and the following message appears: Case Number or Last Name is required to search for a Case.
5	12347	CI-112450 - DSD EM PGM 05 IMPLEMENTED	All Tasks	The begin date is later than the end date for the task search.	Do not allow the action	The data in this screen will not be processed and the following message appears: "Begin Date must be before the End Date."
6	12345	CI-112428 - DSD EM PGM 06 IMPLEMENTED	All Tasks	The begin date is more than six months before the end date for the task search.	Do not allow the action	The data in this screen will not be processed and the following message appears: Task Search is limited to a 6 month period. The Begin Date must be no more than 6 months before the End Date.
7	12360	CI-112433 - DSD EM PGM 07 IMPLEMENTED	Manage User Caseload	The user selects Get Caseload and no user has been selected in My Users field.	Do not allow the action	The data in this screen will not be processed and the following message appears: A User must be selected in order to display caseload.
8	12360	CI-112408 - DSD EM PGM 08 IMPLEMENTED	Manage User Caseload	The user selects Reassign and there are no cases indicated as selected.	Do not allow the action	The data in this screen will not be processed and the following message appears: A case must be selected to Reassign.
9	12360	CI-112441 - DSD EM PGM 09 IMPLEMENTED	Reassign Cases To	The user has not selected a New Owner and the Assign link is selected.	Do not allow the action	The data in this screen will not be saved and the following message appears: A New Owner must be indicated before cases can be reassigned.
10	11982	CI-112444 - DSD EM PGM 10 IMPLEMENTED	User Zip Codes	The user selects Save and the ZIP Code is blank.	Do not allow the action	The data in this screen will not be saved and the following message appears: A Zip Code must be entered before Save is selected.
11	11982	CI-112400 - DSD EM PGM 11 IMPLEMENTED	User Zip Codes	ZIP code entered is not five numeric digits.	Do not allow the action	The data in this screen will not be saved and the following message appears: Zip Code must be five numeric digits.
12	11988	CI-112424 - DSD EM PGM 12 IMPLEMENTED	Modify User	Worker Number is not four-characters long.	Do not allow the action	The data in this screen will not be saved and the following message appears: Worker Number must be four characters in length.

13	12780	CI-112416 - DSD EM PGM 13 IMPLEMENTED	County Contract Rate	Get County Contractor Rates is selected and no County has been indicated.	Do not allow the action	The data in this screen will not be processed and the following message appears: County must be entered.
14	12780	CI-112445 - DSD EM PGM 14 IMPLEMENTED	Create County Contractor Rate	The Effective Date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: Effective Date must be the 1st day of the month.
15	12780	CI-112422 - DSD EM PGM 15 IMPLEMENTED	Create County Contractor Rate	The rate is less than the wage.	Do not allow the action	The data in this screen will not be saved and the following message appears: Contractor Rate cannot be less than the Contractor Wage.
16	12780	CI-112425 - DSD EM PGM 16 IMPLEMENTED	Create County Contractor Rate	The effective date is prior to an existing contract rate effective date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The new Contract Rate period overlaps with an existing Contract Rate period.
17	12780	CI-112432 - DSD EM PGM 17 IMPLEMENTED	Create County Contractor Rate	The effective date is after the end date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The Contract Rate period Effective Date must not be after the End Date.
18	12780	CI-112434 - DSD EM PGM 18 IMPLEMENTED	Create County Contractor Rate	The effective date is prior to today's date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The Contract Rate period Effective Date cannot be retroactive.
19	12780	CI-112429 - DSD EM PGM 19 IMPLEMENTED	Modify County Contractor Rate	The effective date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Effective Date must be the 1st day of the month."
20	12780	CI-112399 - DSD EM PGM 20 IMPLEMENTED	Modify County Contractor Rate	The effective date is prior to an existing contract rate effective date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The Contract Rate period overlaps with an existing Contract Rate period."

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
21	12780	CI-112446 - DSD EM PGM 21 IMPLEMENTED	Modify County Contractor Rate	The Rate is less than the Wage.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Contractor Rate cannot be less than the Contractor Wage."
22	12780	CI-112440 - DSD EM PGM 22 IMPLEMENTED	Modify County Contractor Rate	The Effective Date is after the End Date.	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Contract Rate period Effective Date must not be after the End Date."
23	12780	CI-112409 - DSD EM PGM 23 IMPLEMENTED	Modify County Contractor Rate	The Effective Date is prior to today's date.	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Contract Rate period Effective Date cannot be retroactive."
24	12780	CI-112414 - DSD EM PGM 24 IMPLEMENTED	Public Authority Wage Rate	Get Public Authority Wage Rates is selected and no County has been indicated.	Do not allow the action	The data in this screen will not be saved and the following message appears: "County must be entered."
25	12780	CI-112407 - DSD EM PGM 25 IMPLEMENTED	Create Public Authority Wage Rate	The Effective Date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Effective Date must be the 1st day of the month."
26	12780	CI-112402 - DSD EM PGM 26 IMPLEMENTED	Create Public Authority Wage Rate	The Rate is less than the Wage.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Public Authority Rate cannot be less than the Public Authority Wage."
27	12780	CI-112401 - DSD EM PGM 27 IMPLEMENTED	Create Public Authority Wage Rate	The Effective Date is after the End Date.	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date must not be after the End Date."

28	12780	CI-112413 - DSD EM PGM 28 IMPLEMENTED	Create Public Authority Wage Rate	The Effective Date is prior to today's date	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date cannot be retroactive."
29	12780	CI-112404 - DSD EM PGM 29 IMPLEMENTED	Modify Public Authority Wage Rate	The Effective Date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Effective Date must be the 1st day of the month."
30	12780	CI-112449 - DSD EM PGM 30 IMPLEMENTED	Modify Public Authority Wage Rate	The Rate is less than the Wage.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Public Authority Rate cannot be less than the Public Authority Wage."
31	12780	CI-112418 - DSD EM PGM 31 IMPLEMENTED	Modify Public Authority Wage Rate	The Effective Date is after the End Date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date must not be after the End Date."
32	12780	CI-112431 - DSD EM PGM 32 IMPLEMENTED	Modify Public Authority Wage Rate	The Effective Date is prior to today's date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date cannot be retroactive."
33	16637	CI-112435 - DSD EM PGM 33 IMPLEMENTED	Create QA Assessment Review	When the Corrective Action Due Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Corrective Action Due Date."
34	16637	CI-112421 - DSD EM PGM 34 IMPLEMENTED	Create QA Assessment Review	When the Case Remediation Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Case Remediation Date."
35	16637	CI-112438 - DSD EM PGM 35 IMPLEMENTED	Create QA Assessment Review	When the QA Reviewer Name is blank and the Date Review Completed is populated with a date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "QA Reviewer Name is required when Date Review Completed is indicated."
36	16637	CI-112437 - DSD EM PGM 36 IMPLEMENTED	Modify QA Assessment Review	When the Corrective Action Due Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Corrective Action Due Date."
37	16637	CI-112439 - DSD EM PGM 37 IMPLEMENTED	Modify QA Assessment Review	When the Case Remediation Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Case Remediation Date."
38	16637	CI-112405 - DSD EM PGM 38 IMPLEMENTED	Modify QA Assessment Review	When the QA Reviewer Name is blank and the Date Review Completed is populated with a date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "QA Reviewer Name is required when Date Review Completed is indicated."
39	16638	CI-112420 - DSD EM PGM 39 IMPLEMENTED	Create Case Investigation Referral	When a Case Investigation Outcome is entered and the Case Investigation Outcome Date is blank.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date is required when Case Investigation Outcome is entered."
40	16638	CI-112403 - DSD EM PGM 40 IMPLEMENTED	Create Case Investigation Referral	When the Case Investigation Outcome Date is before the Date Case Referred.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date cannot be before Date Case Referred."

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
41	16638	CI-112412 - DSD EM PGM 41 IMPLEMENTED	Modify Case Investigation Referral	When a Case Investigation Outcome is entered and the Case Investigation Outcome Date is blank.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date is required when Case Investigation Outcome is entered."
42	16638	CI-112448 - DSD EM PGM 42 IMPLEMENTED	Modify Case Investigation Referral	When the Case Investigation Outcome Date is before the Date Case Referred.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date cannot be before Date Case Referred."

43	16584	CI-112436 - DSD EM PGM 43 IMPLEMENTED	Modify Paid Claim	When selected Outcome is other than 'Pending' and there is no Outcome Date entered.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Outcome Date is required for the selected Outcome."
44	16584	CI-112406 - DSD EM PGM 44 IMPLEMENTED	Modify Paid Claim	When selected Outcome is 'Referred for Investigation' or 'Referred for Overpayment' and the Overpayment Amount is zero.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Overpayment Amount is required for the selected Outcome."
45	16584	CI-112423 - DSD EM PGM 45 IMPLEMENTED	Modify Paid Claim	When the Outcome Date indicates a date after today's date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Outcome Date must not be a future date."
46	16643	CI-112417 - DSD EM PGM 46 IMPLEMENTED	Public Authority Workspace Case Search	When an attempt is made to search for a case and the Case Number entered is not valid	Do not allow the action.	Display the error message, "Case Number does not exist."
47			Public Authority - Payment Search (deleted – this is now a required field)			
48	16643	CI-112410 - DSD EM PGM 48 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and the Service Period From Date (MMDDCCYY) is entered using a DD value other than the 1st or 16th	Do not allow the action.	Display the error message "Service Period From Date must be the 1st or 16th of the month"
49	16643	CI-112442 - DSD EM PGM 49 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and a Service Period To Date (MMDDCCYY) is entered using a DD value other than the 15th or the last day of the MM entered	Do not allow the action.	Display the error message "Service Period To Date must be the 15th or the last day of the month"
50	16643	CI-112411 - DSD EM PGM 50 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and the Service Period To Date is before the Service Period From Date	Do not allow the action.	Display the error message "Service Period To Date must be after the Service Period From Date"
51	16643	CI-112426 - DSD EM PGM 51 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and the Service Period From Date and Service Period To Date range exceeds 13 months	Do not allow the action.	Display the error message "Service Period From Date and Service Period To Date range cannot exceed thirteen months"
52	12357	CI-112443 - DSD EM PGM 52 IMPLEMENTED	Position List screen (remove a user)	When an attempt is made to remove a user from a position and the user is assigned as the case owner for cases within this district office and the user does not hold any other positions within the district office.	Do not allow the action	Display the error message "User is assigned as a Case Owner. Please reassign cases before removing this user from this position".
53	12357	CI-112427 - DSD EM PGM 53 IMPLEMENTED	Position List screen (remove a user)	When an attempt is made to remove a user from a position and the user has reserved tasks.	Do not allow the action	Display the error message "User has Reserved Tasks. Please reassign tasks before removing this user from this position".
54			Message moved to Section 23, error message 150			
55			Message moved to Section 23, error message 151			
56	16650	CI-112894 - DSD EM PGM 56 IMPLEMENTED	Public Authority Workspace and Public Authority – Provider Search	The SSN search icon is selected and no SSN is entered	Do not allow the action	The following message appears: "SSN is required."
57	16650	CI-112895 - DSD EM PGM 57 IMPLEMENTED	Public Authority Workspace and Public Authority – Provider Search	A SSN is entered, but there is no Provider with the indicated SSN	Do not allow the action	The following message appears: "Provider does not exist."
58	12357	CI-116720 - DSD EM PGM 58 IMPLEMENTED	Modify User	Area Code is indicated and the Phone Number is blank or the Phone Number is indicated and the Area Code is blank for any of the following phone numbers: Business Phone, Office Phone, Fax, Mobile, or Pager.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Phone Number must be entered".

59			Removed per CR 648A			
60	21106 21107	CI-813235 - DSD EM PGM 60 IMPLEMENTED	User ID Management – Create Leave	When the Save link is selected on the User ID Management – Leave pop-up AND the Date field is a past date	Do not allow the action	Display the error message, "Leave Date must be the current or a future date."

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
61	21106 21107	CI-813234 - DSD EM PGM 61 IMPLEMENTED	User ID Management – Create Leave	When the Save link is selected on the User ID Management – Leave pop-up AND a User ID Management ID – Deactivation Exemption record exists for the user	Do not allow the action	Display the error message, "A User ID Management – Leave record may not be created when a User ID Management – Deactivation Exemption record exists."
62	21106 21107	CI-813233 - DSD EM PGM 62 IMPLEMENTED	User ID Management – Deactivation Exemption	When the Save link is selected on the User ID Management – Deactivation Exemption pop-up AND the Date field is a past date	Do not allow the action	Display the error message, "Deactivation Exemption Date must be the current or a future date."
63	21106 21107	CI-813232 - DSD EM PGM 63 IMPLEMENTED	User ID Management – Deactivation Exemption	When the Save link is selected on the User ID Management – Deactivation Exemption pop-up AND a User ID Management ID – Leave record exists for the user	Do not allow the action	Display the error message, "A User ID Management – Deactivation Exemption record may not be created when a User ID Management – Leave record exists."
64	21106	CI-813231 - DSD EM PGM 64 IMPLEMENTED	User Workload Search	When the Search link is selected on the User Workload screen AND the Owner field indicates "User" AND the Case Status field is blank AND the Pending Evidence check box is unchecked	Do not allow the action	Display the error message, 'When the Owner field indicates "User", either a Case Status must be selected or the Pending Evidence checkbox must be selected.'
65	21106	CI-813230 - DSD EM PGM 65 IMPLEMENTED	User Workload Search	When the Search link is selected on the User Workload screen AND the Owner field indicates an individual user AND the Pending Evidence check box is unchecked AND the Case Status field is blank	Do not allow the action	Display the error message, "Search not allowed until either a Case Status is selected or the Pending Evidence checkbox is selected."
66	12756	CI-823057 - DSD EM PGM 66 IMPLEMENTED	Inactivate user – Delete User Confirmation	When 'Yes' is selected on the Delete User pop-up AND The user has 1 or more cases assigned to them	Do not allow the action	Display the error message, "This user is the owner of at least one case and therefore cannot be canceled. Please contact the user's supervisor."
67	12756	CI-823059 - DSD EM PGM 67 IMPLEMENTED	Inactivate User – Delete User Open Tasks	When 'Yes' is selected on the Delete User pop-up AND The user has 1 or more tasks and/or notifications assigned to them	Allow the action	Display the Informational message, "User has open tasks and/or notifications. Continuing with this action will close the tasks and delete the notifications. Select Continue to confirm you want to delete this user, close the tasks and delete the notifications." AND Update the 'Yes' button to 'Continue' button
68	21378	CI-823665 - DSD EM PGM 68 IMPLEMENTED	CSP 2FA - Send Verification Code - Phone Number	When the Send Verification Code button is selected on the Send Verification Code pop-up AND The area code entered is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."

69	21378	CI-823666 - DSD EM PGM 69 IMPLEMENTED	CSP 2FA - Send Verification Code - Phone Number	When the Send Verification Code button is selected on the Send Verification Code pop-up AND The phone number entered is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
70	21378	CI-823667 - DSD EM PGM 70 IMPLEMENTED	CSP 2FA - Send Verification Code - Email Address	When the Send Verification Code button is selected AND The email address indicated has more than one "@" OR The email address indicated has less than two (2) characters before the @ OR The email address indicated does not contain at least one "." in the domain name OR The email address indicated does not contain at least one character either before or after each "." in the domain name OR The email address indicated begins or ends with a special character (for example *, ^, %, $, #)	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
71	21378	CI-823770 - DSD EM PGM 71 IMPLEMENTED	CSP 2FA - Enter Verification Code - Email Address/Phone Number	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND IF an invalid verification code is entered	Do not allow the action	Display the service level error message, "The verification code is invalid, please re-enter the verification code."
72	21378	CI-823771 - DSD EM PGM 72 IMPLEMENTED	CSP 2FA - Enter Verification Code - Email Address/Phone Number	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND If the entered code has expired,	Do not allow the action	Display the service level error message, "The verification code has expired, please select "Resend Code" to receive a new verification code."
73	21378	CI-823772 - DSD EM PGM 73 IMPLEMENTED	CSP 2FA - Enter Verification Code - Email Address/Phone Number	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND If a code is entered on the 6th try after 5 invalid codes have been entered	Do not allow the action	Display the service level error message, "This verification code is no longer valid since you entered an incorrect verification code more than 5 times. Please select "Resend Code" to receive a new verification code."
74	21378	CI-823819 - DSD EM PGM 74 IMPLEMENTED	CSP 2FA - Enter Verification Code -no verification code	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND The verification code field is blank	Do not allow the action	Display the error message, "Verification Code is required."
75	21378	CI-823820 - DSD EM PGM 75 IMPLEMENTED	CSP 2FA - Enter Verification Code - non numeric digits	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND The user input non-numeric characters in the verification code field	Do not allow the action	Display the error message, "The verification code must be numeric."

76	21378	CI-823821 - DSD EM PGM 76 IMPLEMENTED	CSP 2FA - Enter Verification Code - Less than 6 digit code	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND The user inputs more or less than six (6) characters	Do not allow the action	Display the error message, "Verification Code must be six (6) digits in length."

DSD 26/Recip CM & OS – Program Management, Fraud /Error Messages (1-20)

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
1	12345	CI-112430 - DSD EM PGM 01 IMPLEMENTED	Task Search	When task ID and case number or task ID and case are entered.	Do not allow the action	The data in this screen will not be processed and the following message appears: Case Number or Case is not allowed if a Task ID has been entered.
2	12345	CI-112419 - DSD EM PGM 02 IMPLEMENTED	Task Search	When case number and case are entered.	Do not allow the action	The data in this screen will not be processed and the following message appears: Case is not allowed if a Case Number has been entered.
3	12347	CI-112415 - DSD EM PGM 03 IMPLEMENTED	Task Search	When there are more than 50 tasks associated with the Task Search.	Display the most recent 50 tasks	The list will display the most recent 50 tasks and the following message appears: More than 50 Tasks found. To view more tasks, select Tasks from the Case Home screen.
4	12650	CI-112447 - DSD EM PGM 04 IMPLEMENTED	Case Search	When only the first name is entered and the Search link is selected.	Do not allow the action	The data in this screen will not be processed and the following message appears: Case Number or Last Name is required to search for a Case.
5	12347	CI-112450 - DSD EM PGM 05 IMPLEMENTED	All Tasks	The begin date is later than the end date for the task search.	Do not allow the action	The data in this screen will not be processed and the following message appears: "Begin Date must be before the End Date."
6	12345	CI-112428 - DSD EM PGM 06 IMPLEMENTED	All Tasks	The begin date is more than six months before the end date for the task search.	Do not allow the action	The data in this screen will not be processed and the following message appears: Task Search is limited to a 6 month period. The Begin Date must be no more than 6 months before the End Date.
7	12360	CI-112433 - DSD EM PGM 07 IMPLEMENTED	Manage User Caseload	The user selects Get Caseload and no user has been selected in My Users field.	Do not allow the action	The data in this screen will not be processed and the following message appears: A User must be selected in order to display caseload.
8	12360	CI-112408 - DSD EM PGM 08 IMPLEMENTED	Manage User Caseload	The user selects Reassign and there are no cases indicated as selected.	Do not allow the action	The data in this screen will not be processed and the following message appears: A case must be selected to Reassign.
9	12360	CI-112441 - DSD EM PGM 09 IMPLEMENTED	Reassign Cases To	The user has not selected a New Owner and the Assign link is selected.	Do not allow the action	The data in this screen will not be saved and the following message appears: A New Owner must be indicated before cases can be reassigned.
10	11982	CI-112444 - DSD EM PGM 10 IMPLEMENTED	User Zip Codes	The user selects Save and the ZIP Code is blank.	Do not allow the action	The data in this screen will not be saved and the following message appears: A Zip Code must be entered before Save is selected.
11	11982	CI-112400 - DSD EM PGM 11 IMPLEMENTED	User Zip Codes	ZIP code entered is not five numeric digits.	Do not allow the action	The data in this screen will not be saved and the following message appears: Zip Code must be five numeric digits.
12	11988	CI-112424 - DSD EM PGM 12 IMPLEMENTED	Modify User	Worker Number is not four-characters long.	Do not allow the action	The data in this screen will not be saved and the following message appears: Worker Number must be four characters in length.
13	12780	CI-112416 - DSD EM PGM 13 IMPLEMENTED	County Contract Rate	Get County Contractor Rates is selected and no County has been indicated.	Do not allow the action	The data in this screen will not be processed and the following message appears: County must be entered.
14	12780	CI-112445 - DSD EM PGM 14 IMPLEMENTED	Create County Contractor Rate	The Effective Date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: Effective Date must be the 1st day of the month.

15	12780	CI-112422 - DSD EM PGM 15 IMPLEMENTED	Create County Contractor Rate	The rate is less than the wage.	Do not allow the action	The data in this screen will not be saved and the following message appears: Contractor Rate cannot be less than the Contractor Wage.
16	12780	CI-112425 - DSD EM PGM 16 IMPLEMENTED	Create County Contractor Rate	The effective date is prior to an existing contract rate effective date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The new Contract Rate period overlaps with an existing Contract Rate period.
17	12780	CI-112432 - DSD EM PGM 17 IMPLEMENTED	Create County Contractor Rate	The effective date is after the end date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The Contract Rate period Effective Date must not be after the End Date.
18	12780	CI-112434 - DSD EM PGM 18 IMPLEMENTED	Create County Contractor Rate	The effective date is prior to today's date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The Contract Rate period Effective Date cannot be retroactive.
19	12780	CI-112429 - DSD EM PGM 19 IMPLEMENTED	Modify County Contractor Rate	The effective date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Effective Date must be the 1st day of the month."
20	12780	CI-112399 - DSD EM PGM 20 IMPLEMENTED	Modify County Contractor Rate	The effective date is prior to an existing contract rate effective date.	Do not allow the action	The data in this screen will not be saved and the following message appears: The Contract Rate period overlaps with an existing Contract Rate period."

DSD 26/Recip CM & OS – Program Management, Fraud /Error Messages (21-40)

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
21	12780	CI-112446 - DSD EM PGM 21 IMPLEMENTED	Modify County Contractor Rate	The Rate is less than the Wage.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Contractor Rate cannot be less than the Contractor Wage."
22	12780	CI-112440 - DSD EM PGM 22 IMPLEMENTED	Modify County Contractor Rate	The Effective Date is after the End Date.	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Contract Rate period Effective Date must not be after the End Date."
23	12780	CI-112409 - DSD EM PGM 23 IMPLEMENTED	Modify County Contractor Rate	The Effective Date is prior to today's date.	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Contract Rate period Effective Date cannot be retroactive."
24	12780	CI-112414 - DSD EM PGM 24 IMPLEMENTED	Public Authority Wage Rate	Get Public Authority Wage Rates is selected and no County has been indicated.	Do not allow the action	The data in this screen will not be saved and the following message appears: "County must be entered."
25	12780	CI-112407 - DSD EM PGM 25 IMPLEMENTED	Create Public Authority Wage Rate	The Effective Date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Effective Date must be the 1st day of the month."
26	12780	CI-112402 - DSD EM PGM 26 IMPLEMENTED	Create Public Authority Wage Rate	The Rate is less than the Wage.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Public Authority Rate cannot be less than the Public Authority Wage."
27	12780	CI-112401 - DSD EM PGM 27 IMPLEMENTED	Create Public Authority Wage Rate	The Effective Date is after the End Date.	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date must not be after the End Date."
28	12780	CI-112413 - DSD EM PGM 28 IMPLEMENTED	Create Public Authority Wage Rate	The Effective Date is prior to today's date	Do not allow the action	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date cannot be retroactive."
29	12780	CI-112404 - DSD EM PGM 29 IMPLEMENTED	Modify Public Authority Wage Rate	The Effective Date is not the first day of the month.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Effective Date must be the 1st day of the month."
30	12780	CI-112449 - DSD EM PGM 30 IMPLEMENTED	Modify Public Authority Wage Rate	The Rate is less than the Wage.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Public Authority Rate cannot be less than the Public Authority Wage."
31	12780	CI-112418 - DSD EM PGM 31 IMPLEMENTED	Modify Public Authority Wage Rate	The Effective Date is after the End Date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date must not be after the End Date."
32	12780	CI-112431 - DSD EM PGM 32 IMPLEMENTED	Modify Public Authority Wage Rate	The Effective Date is prior to today's date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "The Public Authority Rate period Effective Date cannot be retroactive."
33	16637	CI-112435 - DSD EM PGM 33 IMPLEMENTED	Create QA Assessment Review	When the Corrective Action Due Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Corrective Action Due Date."
34	16637	CI-112421 - DSD EM PGM 34 IMPLEMENTED	Create QA Assessment Review	When the Case Remediation Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Case Remediation Date."

35	16637	CI-112438 - DSD EM PGM 35 IMPLEMENTED	Create QA Assessment Review	When the QA Reviewer Name is blank and the Date Review Completed is populated with a date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "QA Reviewer Name is required when Date Review Completed is indicated."
36	16637	CI-112437 - DSD EM PGM 36 IMPLEMENTED	Modify QA Assessment Review	When the Corrective Action Due Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Corrective Action Due Date."
37	16637	CI-112439 - DSD EM PGM 37 IMPLEMENTED	Modify QA Assessment Review	When the Case Remediation Date is before the Date Review Completed.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Date Review Completed must be before Case Remediation Date."
38	16637	CI-112405 - DSD EM PGM 38 IMPLEMENTED	Modify QA Assessment Review	When the QA Reviewer Name is blank and the Date Review Completed is populated with a date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "QA Reviewer Name is required when Date Review Completed is indicated."
39	16638	CI-112420 - DSD EM PGM 39 IMPLEMENTED	Create Case Investigation Referral	When a Case Investigation Outcome is entered and the Case Investigation Outcome Date is blank.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date is required when Case Investigation Outcome is entered."
40	16638	CI-112403 - DSD EM PGM 40 IMPLEMENTED	Create Case Investigation Referral	When the Case Investigation Outcome Date is before the Date Case Referred.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date cannot be before Date Case Referred."

DSD 26/Recip CM & OS – Program Management, Fraud /Error Messages (41-60)

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
41	16638	CI-112412 - DSD EM PGM 41 IMPLEMENTED	Modify Case Investigation Referral	When a Case Investigation Outcome is entered and the Case Investigation Outcome Date is blank.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date is required when Case Investigation Outcome is entered."
42	16638	CI-112448 - DSD EM PGM 42 IMPLEMENTED	Modify Case Investigation Referral	When the Case Investigation Outcome Date is before the Date Case Referred.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Case Investigation Outcome Date cannot be before Date Case Referred."
43	16584	CI-112436 - DSD EM PGM 43 IMPLEMENTED	Modify Paid Claim	When selected Outcome is other than 'Pending' and there is no Outcome Date entered.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Outcome Date is required for the selected Outcome."
44	16584	CI-112406 - DSD EM PGM 44 IMPLEMENTED	Modify Paid Claim	When selected Outcome is 'Referred for Investigation' or 'Referred for Overpayment' and the Overpayment Amount is zero.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Overpayment Amount is required for the selected Outcome."
45	16584	CI-112423 - DSD EM PGM 45 IMPLEMENTED	Modify Paid Claim	When the Outcome Date indicates a date after today's date.	Do not allow the action.	The data in this screen will not be saved and the following message appears: "Outcome Date must not be a future date."
46	16643	CI-112417 - DSD EM PGM 46 IMPLEMENTED	Public Authority Workspace Case Search	When an attempt is made to search for a case and the Case Number entered is not valid	Do not allow the action.	Display the error message, "Case Number does not exist."
47			Public Authority - Payment Search (deleted – this is now a required field)			
48	16643	CI-112410 - DSD EM PGM 48 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and the Service Period From Date (MMDDCCYY) is entered using a DD value other than the 1st or 16th	Do not allow the action.	Display the error message "Service Period From Date must be the 1st or 16th of the month"
49	16643	CI-112442 - DSD EM PGM 49 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and a Service Period To Date (MMDDCCYY) is entered using a DD value other than the 15th or the last day of the MM entered	Do not allow the action.	Display the error message "Service Period To Date must be the 15th or the last day of the month"
50	16643	CI-112411 - DSD EM PGM 50 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and the Service Period To Date is before the Service Period From Date	Do not allow the action.	Display the error message "Service Period To Date must be after the Service Period From Date"
51	16643	CI-112426 - DSD EM PGM 51 IMPLEMENTED	Public Authority - Payment Search	When an attempt is made to search for payments and the Service Period From Date and Service Period To Date range exceeds 13 months	Do not allow the action.	Display the error message "Service Period From Date and Service Period To Date range cannot exceed thirteen months"
52	12357	CI-112443 - DSD EM PGM 52 IMPLEMENTED	Position List screen (remove a user)	When an attempt is made to remove a user from a position and the user is assigned as the case owner for cases within this district office and the user does not hold any other positions within the district office.	Do not allow the action	Display the error message "User is assigned as a Case Owner. Please reassign cases before removing this user from this position".
53	12357	CI-112427 - DSD EM PGM 53 IMPLEMENTED	Position List screen (remove a user)	When an attempt is made to remove a user from a position and the user has reserved tasks.	Do not allow the action	Display the error message "User has Reserved Tasks. Please reassign tasks before removing this user from this position".
54			Message moved to Section 23, error message 150			

55			Message moved to Section 23, error message 151			
56	16650	CI-112894 - DSD EM PGM 56 IMPLEMENTED	Public Authority Workspace and Public Authority – Provider Search	The SSN search icon is selected and no SSN is entered	Do not allow the action	The following message appears: "SSN is required."
57	16650	CI-112895 - DSD EM PGM 57 IMPLEMENTED	Public Authority Workspace and Public Authority – Provider Search	A SSN is entered, but there is no Provider with the indicated SSN	Do not allow the action	The following message appears: "Provider does not exist."
58	12357	CI-116720 - DSD EM PGM 58 IMPLEMENTED	Modify User	Area Code is indicated and the Phone Number is blank or the Phone Number is indicated and the Area Code is blank for any of the following phone numbers: Business Phone, Office Phone, Fax, Mobile, or Pager.	Do not allow the action	The data in this screen will not be saved and the following message appears: "Phone Number must be entered".
59			Removed per CR 648A			
60	21106 21107	CI-813235 - DSD EM PGM 60 IMPLEMENTED	User ID Management – Create Leave	When the Save link is selected on the User ID Management – Leave pop-up AND the Date field is a past date	Do not allow the action	Display the error message, "Leave Date must be the current or a future date."

DSD 26/Recip CM & OS – Program Management, Fraud /Error Messages (61-80)

No	Req ID	CI	Screen Name User Action	Condition	Action	Error
61	21106 21107	CI-813234 - DSD EM PGM 61 IMPLEMENTED	User ID Management – Create Leave	When the Save link is selected on the User ID Management – Leave pop-up AND a User ID Management ID – Deactivation Exemption record exists for the user	Do not allow the action	Display the error message, "A User ID Management – Leave record may not be created when a User ID Management – Deactivation Exemption record exists."
62	21106 21107	CI-813233 - DSD EM PGM 62 IMPLEMENTED	User ID Management – Deactivation Exemption	When the Save link is selected on the User ID Management – Deactivation Exemption pop-up AND the Date field is a past date	Do not allow the action	Display the error message, "Deactivation Exemption Date must be the current or a future date."
63	21106 21107	CI-813232 - DSD EM PGM 63 IMPLEMENTED	User ID Management – Deactivation Exemption	When the Save link is selected on the User ID Management – Deactivation Exemption pop-up AND a User ID Management ID – Leave record exists for the user	Do not allow the action	Display the error message, "A User ID Management – Deactivation Exemption record may not be created when a User ID Management – Leave record exists."
64	21106	CI-813231 - DSD EM PGM 64 IMPLEMENTED	User Workload Search	When the Search link is selected on the User Workload screen AND the Owner field indicates "User" AND the Case Status field is blank AND the Pending Evidence check box is unchecked	Do not allow the action	Display the error message, 'When the Owner field indicates "User", either a Case Status must be selected or the Pending Evidence checkbox must be selected.'
65	21106	CI-813230 - DSD EM PGM 65 IMPLEMENTED	User Workload Search	When the Search link is selected on the User Workload screen AND the Owner field indicates an individual user AND the Pending Evidence check box is unchecked AND the Case Status field is blank	Do not allow the action	Display the error message, "Search not allowed until either a Case Status is selected or the Pending Evidence checkbox is selected."
66	12756	CI-823057 - DSD EM PGM 66 IMPLEMENTED	Inactivate user – Delete User Confirmation	When 'Yes' is selected on the Delete User pop-up AND The user has 1 or more cases assigned to them	Do not allow the action	Display the error message, "This user is the owner of at least one case and therefore cannot be canceled. Please contact the user's supervisor."
67	12756	CI-823059 - DSD EM PGM 67 IMPLEMENTED	Inactivate User – Delete User Open Tasks	When 'Yes' is selected on the Delete User pop-up AND The user has 1 or more tasks and/or notifications assigned to them	Allow the action	Display the Informational message, "User has open tasks and/or notifications. Continuing with this action will close the tasks and delete the notifications. Select Continue to confirm you want to delete this user, close the tasks and delete the notifications." AND Update the 'Yes' button to 'Continue' button
68	21378	CI-823665 - DSD EM PGM 68 IMPLEMENTED	CSP 2FA - Send Verification Code - Phone Number	When the Send Verification Code button is selected on the Send Verification Code pop-up AND The area code entered is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
69	21378	CI-823666 - DSD EM PGM 69 IMPLEMENTED	CSP 2FA - Send Verification Code - Phone Number	When the Send Verification Code button is selected on the Send Verification Code pop-up AND The phone number entered is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."

70	21378	CI-823667 - DSD EM PGM 70 IMPLEMENTED	CSP 2FA - Send Verification Code - Email Address	When the Send Verification Code button is selected AND The email address indicated has more than one "@" OR The email address indicated has less than two (2) characters before the @ OR The email address indicated does not contain at least one "." in the domain name OR The email address indicated does not contain at least one character either before or after each "." in the domain name OR The email address indicated begins or ends with a special character (for example *, ^, %, $, #)	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
71	21378	CI-823770 - DSD EM PGM 71 IMPLEMENTED	CSP 2FA - Enter Verification Code - Email Address/Phone Number	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND IF an invalid verification code is entered	Do not allow the action	Display the service level error message, "The verification code is invalid, please re-enter the verification code."
72	21378	CI-823771 - DSD EM PGM 72 IMPLEMENTED	CSP 2FA - Enter Verification Code - Email Address/Phone Number	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND If the entered code has expired,	Do not allow the action	Display the service level error message, "The verification code has expired, please select "Resend Code" to receive a new verification code."
73	21378	CI-823772 - DSD EM PGM 73 IMPLEMENTED	CSP 2FA - Enter Verification Code - Email Address/Phone Number	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND If a code is entered on the 6th try after 5 invalid codes have been entered	Do not allow the action	Display the service level error message, "This verification code is no longer valid since you entered an incorrect verification code more than 5 times. Please select "Resend Code" to receive a new verification code."
74	21378	CI-823819 - DSD EM PGM 74 IMPLEMENTED	CSP 2FA - Enter Verification Code -no verification code	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND The verification code field is blank	Do not allow the action	Display the error message, "Verification Code is required."
75	21378	CI-823820 - DSD EM PGM 75 IMPLEMENTED	CSP 2FA - Enter Verification Code - non numeric digits	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND The user input non-numeric characters in the verification code field	Do not allow the action	Display the error message, "The verification code must be numeric."
76	21378	CI-823821 - DSD EM PGM 76 IMPLEMENTED	CSP 2FA - Enter Verification Code - Less than 6 digit code	When the Verify button is selected on the Enter Verification Code (Email Address or Phone Number) screen AND The user inputs more or less than six (6) characters	Do not allow the action	Display the error message, "Verification Code must be six (6) digits in length."

DSD 26/Recip CM & OS – Program Management, Fraud /Business Rules

The following Business Rules apply to Program Management and Fraud processes:

ID	Req ID	CI	Description	When	Action
1	12347	CI-111500 - DSD BR PGM 01 IMPLEMENTED	Automated reserve of tasks assigned to users.	When a task is assigned by the System to a specific User	When a task is assigned by the system to a specific User, the task should be set to Reserved by the system.
2	20823	CI-111501 - DSD BR PGM 02 IMPLEMENTED	Reassign reserved tasks when a Case is assigned to a new case worker manually.	Upon manual reassignment of a case to a new owner	When a Case is reassigned, any tasks which are associated with the case and Reserved to the old case owner should be reassigned and reserved to the new case owner AND Generate notification to the new case owner - '[case name] [case number] Case Assigned'
3	12343	CI-111502 - DSD BR PGM 03 IMPLEMENTED	List of users should be limited to those users within the Organization of the current user.	On the User Search Screen	Display only those Users within the current user's County.
4	21108	CI-111503 - DSD BR PGM 04 IMPLEMENTED	List of work queues on the Create Task and Forward Task screens should be limited to those work queues within the current user's county.	On the Work Queue List Screen	Display only those Work Queues which are related to the current user's County
5	12343	CI-111504 - DSD BR PGM 05 IMPLEMENTED	List of locations displayed from the User Home Screen should be limited to those locations within the current user's county.	On the Locations List Screen	Display only those Locations which are related to the current user's (County System Administrator) County.
6	12529	CI-111505 - DSD BR PGM 06 IMPLEMENTED	TAR Receive	When TAR Receive job is run via batch scheduler.	Generate the following Tasks and notifications based upon receipt of Treatment Authorization Requests (TARs) for a case. Task is sent to Case Worker for any case with approved In-patient or Long Term Care TAR. Notification sent to Case Worker for any case with approved Adult Day Health Care TAR. Notification sent to Case Worker for any case with a pending In-patient, Long Term Care of Adult Day Health Care TAR.
7	12345	CI-111506 - DSD BR PGM 07 IMPLEMENTED	Only show "active" notifications on the My Notifications Screen	Display of My Notifications	Only display those notifications in an "active" status.
8	12643	CI-111507 - DSD BR PGM 08 IMPLEMENTED	Limit the Case Search to only those cases within the User's county.	Case Search screen	Only display those cases which are associated with the User's County
9	21108	CI-111508 - DSD BR PGM 09 IMPLEMENTED	List of Work Queues displayed should be limited to only those work queues applicable to the user's (County System Administrator) county.	Display of Work Queue Subscriptions screen in the Cúram Administration Manager application	Only display those work queues for the user's county.
10	16581 16583	CI-111509 - DSD BR PGM 10 IMPLEMENTED	Medi-Cal Service Match	When Medi-Cal Service Match job is run via batch scheduler.	Following are the business Rules: Use the CIN from the Medi-Cal Service Match file to determine the Recipient Case to add the Paid Claims record. Task is sent to the QA queue in the county indicated on the Medi-Cal Service Match file. This will facilitate investigations on prior payments on cases which have moved counties. Create a single task to the QA queue for a case for a service month if there are multiple paid claims for the same case and same service month on the Medi-Cal Service Match file. When multiple records for the same CIN and service month are received on the Medi-Cal Service Match file. Create a Paid Claim record for display in the Paid Claims List screen for each paid claim record received on the Medi-Cal Service Match file. Paid claims record for stays less than two days will be disregarded and not stored within CMIPS. If the Service End Date on the Medi-Cal Service Match file is blank, assume this is an ongoing In-Patient or Long Term Care Claim for purposes of determining if the stay is longer than two days.

ID	Req ID	CI	Description	When	Action
11	16025	CI-111510 - DSD BR PGM 11 IMPLEMENTED	CDPH Death Match Interface	When CDPH Death Match Interface job is run via batch scheduler.	Following are the business rules: Death Confirmed, do not update the Person death information and do not create tasks for the case owner. Pending and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information with the new Reported Date of Death and do not create tasks for the case owner. Pending and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the case owner. Not Deceased and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information as Pending with the newly Reported Date of Death and create tasks for the case owner. If a reported date of death on the interface is a future date, disregard the record. Not Deceased and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the case owner. Update the Person death information and create new tasks for the case owner or QA queue indicating the receipt of the death notification as described.
12	16644 16645	CI-111511 - DSD BR PGM 12 IMPLEMENTED	SCO Death Match Receive Interface	When SCO Death Match Receive Interface job is run via batch scheduler.	Following are the business rules: Death Confirmed, do not update the Person death information and do not create tasks for the QA queue. Pending and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information with the new Reported Date of Death and do not create tasks for the QA queue. Pending and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the QA queue. Not Deceased and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information as Pending with the newly Reported Date of Death and create tasks for the QA queue. If a reported date of death on the interface is a future date, disregard the record. Not Deceased and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the QA queue.
13	16648	CI-111512 - DSD BR PGM 13 IMPLEMENTED	SCO Death Match Send (Response) Interface	When SCO Death Match Send (Response) Interface job is run via batch scheduler.	Following are the business rules: Report all records to SCO which are not indicated as having been reported on the SCO Death Match table (field 'Reported'). Update the Reported indicator on the SCO Death Match table once an outcome other than 'Pending' has been reported to SCO.
14	16693	CI-111513 - DSD BR PGM 14 IMPLEMENTED	Automatically terminate an active case Provider relationship upon death confirmation entered on the Modify Person screen.	Modify Person Screen. Upon confirmation of a death for a Provider in Active or On Leave status.	Terminate the Recipient/Provider relationship by: Setting the Provider status to Terminated Setting the Termination Reason to "Provider Death" Setting the Effective Date of the termination to the Date of Death
15	12343	CI-111514 - DSD BR PGM 15 IMPLEMENTED	Organization list displayed for the County Security Admin should be limited to those organizations within the current user's county, If the user is within CDSS Adult Programs Branch, then display the CDSS organization units as well as all counties.	On the Organization Units List screen	Display only those Organizations which are related to the current user (County Security Officer/Administrator) County or CDSS (CDSS Security Officer/Administrator).

16	16829	CI-116764 - DSD BR PGM 16 IMPLEMENTED	Modify User Display User Name in All Uppercase Letters	When the Save link is selected on the Modify User screen and lowercase letters were used when entering the following fields: Last Name First Name	Display the First Name and Last Name entries in all uppercase letters on the Modify User screen.
17	12360	CI-447043 - DSD BR PGM 17 IMPLEMENTED	Manage User Caseload screen	When the "Get Caseload" link is selected from the Manage User Caseload screen	Up to the first 500 cases assigned to the designated user will display. Display informational message, "This user has XXX cases, but only 500 are displayed." XXX = Total user case count
18	20823	CI-507578 - DSD BR PGM 18 IMPLEMENTED	Forward/Reassign Active Case Tasks when case is transferred in batch (700MINDN)	When case(s) is set to transferred from one case owner to another in the nightly batch AND Batch job 700MINDN is completed successfully	Transfer all scheduled cases to the new case owner AND Delete all tasks associated to the case which were manually created, for the transferred case, by the old case owner AND Any “Active” tasks associated with the case that are reserved by the old case owner are set as reserved by and assigned to the new case owner AND Assign all "Active" unreserved tasks associated with the transferred case to the new case AND Generate notification to the new case owner - 'Multiple New Cases Assigned: <# of cases> cases have been assigned to you.'
19	21106 21107	CI-813236 - DSD BR PGM 19 IMPLEMENTED	User Workspace – User ID Management – Leave	When the User Workspace displays and no active User ID Management – Leave segments exist	Display the Leave link in the Action section of the User ID Management – Leave cluster.
20	21106 21107	CI-813237 - DSD BR PGM 20 IMPLEMENTED	User Workspace – User ID Management – Leave	When the User Workspace displays and an active User ID Management – Leave segment exists	Display the End Leave link in the Action section of the User ID Management – Leave cluster as well as the date associated with the active record.

ID	Req ID	CI	Description	When	Action
21	21106 21107	CI-813238 - DSD BR PGM 21 IMPLEMENTED	User Workspace – User ID Management – Exempt from Deactivation	When the User Workspace displays and no active User ID Management – Deactivation Exemption segments exist	Display the Exempt from Deactivation link in the Action section of the User ID Management – Exempt from Deactivation cluster.
22	21106 21107	CI-813239 - DSD BR PGM 22 IMPLEMENTED	User Workspace – User ID Management – Exempt from Deactivation	When the User Workspace displays and an active User ID Management – Deactivation Exemption segment exists	Display the Remove Exemption link in the Action section of the User ID Management – Exempt from Deactivation cluster as well as the date associated with the active record.
23	21106	CI-813240 - DSD BR PGM 23 IMPLEMENTED	Reserve Assign Tasks	When the Save link is selected on the Reserve Assign Task pop-up AND the Reserve By indications is "Longest Assigned"	Assign the indicated Number of Tasks to the user Task assigned to the Work Queue the longest period of time.
24	21106	CI-813241 - DSD BR PGM 24 IMPLEMENTED	Reserve Assign Tasks	When the Save link is selected on the Reserve Assign Task pop-up AND the Reserve By indications is "Priority"	Assign the indicated Number of Tasks to the user beginning with the highest priority task, then from the oldest to the most recent. Example: If there are three (3) High priority Tasks and 27 Medium Priority Tasks and the "Number of Tasks" indicated by the user is seven (7), then the three (3) High Priority Tasks will be reserved, regardless of how long these tasks have been assigned to the Work Queue, and then the four Medium priority tasks, which have been assigned to the Work Queue the longest period of time, will also be reserved.
25	21106	CI-813242 - DSD BR PGM 25 IMPLEMENTED	Reserve Tasks From Work Queue	When the Save link is selected on the Reserve Task from Work Queue pop-up AND the Reserve By indications is "Longest Assigned"	Assign the indicated Number of Tasks to the user Task assigned to the Work Queue the longest period of time.

26	21106	CI-813243 - DSD BR PGM 26 IMPLEMENTED	Reserve Tasks From Work Queue	When the Save link is selected on the Reserve Task from Work Queue pop-up AND the Reserve By indications is "Priority"	Assign the indicated Number of Tasks to the user beginning with the highest priority task, then from the oldest to the most recent. Example: If there are three (3) High priority Tasks and 27 Medium Priority Tasks and the Number of Tasks is seven (7), then the three (3) High Priority Tasks, regardless of how long these tasks have been assigned to the Work Queue. Then the four Medium priority tasks which have been assigned to the Work Queue the longest.
27	21378	CI-823774 - DSD BR PGM 27 IMPLEMENTED	CSP 2FA - Send Verification code to email	When the user selects the Send Verification Code button from the Send Verification Code - Email Address OR When the user selects the Resend Code button from the Enter Verification Code - Email Address	A six digit code is generated and inserted into the CSP 2FA verification code email template AND IHSS - CMIPS Service Portal Verification Code (ESTE69) email is sent to the provided email address
28	21378	CI-823775 - DSD BR PGM 28 IMPLEMENTED	CSP 2FA - save and store verified email address for CSP access	When the user selects the Verify button from the Enter Verification Code - Email Address CM pop-up, CM validates the six digit code AND IF Verification code entered is valid	Update the user's valid email on the CSP Access screen AND close the pop-up AND the user is returned to the CSP access screen.
29	21378	CI-823825 - DSD BR PGM 29 IMPLEMENTED	CSP 2FA - save and store verified phone number for CSP access	When the user selects the Verify button from the Enter Verification Code - Phone Number CM pop-up, CM validates the six digit code AND IF Verification code entered is valid	Update the user's valid phone number on the CSP Access screen AND close the pop-up AND the user is returned to the CSP access screen.
30	21378	CI-824082 - DSD BR PGM 30 IMPLEMENTED	CSP 2FA - Send Verification Code to phone number	When the user selects the Send Verification Code button from the Send Verification Code - Phone Number CM pop-up	A six digit code is generated and included in a text message or voice message to the provided phone number. Depending on the Verification Option selected.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Rules (1-10)

ID	Req ID	CI	Description	When	Action
1	12347	CI-111500 - DSD BR PGM 01 IMPLEMENTED	Automated reserve of tasks assigned to users.	When a task is assigned by the System to a specific User	When a task is assigned by the system to a specific User, the task should be set to Reserved by the system.
2	20823	CI-111501 - DSD BR PGM 02 IMPLEMENTED	Reassign reserved tasks when a Case is assigned to a new case worker manually.	Upon manual reassignment of a case to a new owner	When a Case is reassigned, any tasks which are associated with the case and Reserved to the old case owner should be reassigned and reserved to the new case owner AND Generate notification to the new case owner - '[case name] [case number] Case Assigned'
3	12343	CI-111502 - DSD BR PGM 03 IMPLEMENTED	List of users should be limited to those users within the Organization of the current user.	On the User Search Screen	Display only those Users within the current user's County.
4	21108	CI-111503 - DSD BR PGM 04 IMPLEMENTED	List of work queues on the Create Task and Forward Task screens should be limited to those work queues within the current user's county.	On the Work Queue List Screen	Display only those Work Queues which are related to the current user's County
5	12343	CI-111504 - DSD BR PGM 05 IMPLEMENTED	List of locations displayed from the User Home Screen should be limited to those locations within the current user's county.	On the Locations List Screen	Display only those Locations which are related to the current user's (County System Administrator) County.
6	12529	CI-111505 - DSD BR PGM 06 IMPLEMENTED	TAR Receive	When TAR Receive job is run via batch scheduler.	Generate the following Tasks and notifications based upon receipt of Treatment Authorization Requests (TARs) for a case. Task is sent to Case Worker for any case with approved In-patient or Long Term Care TAR. Notification sent to Case Worker for any case with approved Adult Day Health Care TAR. Notification sent to Case Worker for any case with a pending In-patient, Long Term Care of Adult Day Health Care TAR.
7	12345	CI-111506 - DSD BR PGM 07 IMPLEMENTED	Only show "active" notifications on the My Notifications Screen	Display of My Notifications	Only display those notifications in an "active" status.
8	12643	CI-111507 - DSD BR PGM 08 IMPLEMENTED	Limit the Case Search to only those cases within the User's county.	Case Search screen	Only display those cases which are associated with the User's County
9	21108	CI-111508 - DSD BR PGM 09 IMPLEMENTED	List of Work Queues displayed should be limited to only those work queues applicable to the user's (County System Administrator) county.	Display of Work Queue Subscriptions screen in the Cúram Administration Manager application	Only display those work queues for the user's county.
10	16581 16583	CI-111509 - DSD BR PGM 10 IMPLEMENTED	Medi-Cal Service Match	When Medi-Cal Service Match job is run via batch scheduler.	Following are the business Rules: Use the CIN from the Medi-Cal Service Match file to determine the Recipient Case to add the Paid Claims record. Task is sent to the QA queue in the county indicated on the Medi-Cal Service Match file. This will facilitate investigations on prior payments on cases which have moved counties. Create a single task to the QA queue for a case for a service month if there are multiple paid claims for the same case and same service month on the Medi-Cal Service Match file. When multiple records for the same CIN and service month are received on the Medi-Cal Service Match file. Create a Paid Claim record for display in the Paid Claims List screen for each paid claim record received on the Medi-Cal Service Match file. Paid claims record for stays less than two days will be disregarded and not stored within CMIPS. If the Service End Date on the Medi-Cal Service Match file is blank, assume this is an ongoing In-Patient or Long Term Care Claim for purposes of determining if the stay is longer than two days.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Rules (11-20)

ID	Req ID	CI	Description	When	Action
11	16025	CI-111510 - DSD BR PGM 11 IMPLEMENTED	CDPH Death Match Interface	When CDPH Death Match Interface job is run via batch scheduler.	Following are the business rules: Death Confirmed, do not update the Person death information and do not create tasks for the case owner. Pending and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information with the new Reported Date of Death and do not create tasks for the case owner. Pending and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the case owner. Not Deceased and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information as Pending with the newly Reported Date of Death and create tasks for the case owner. If a reported date of death on the interface is a future date, disregard the record. Not Deceased and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the case owner. Update the Person death information and create new tasks for the case owner or QA queue indicating the receipt of the death notification as described.
12	16644 16645	CI-111511 - DSD BR PGM 12 IMPLEMENTED	SCO Death Match Receive Interface	When SCO Death Match Receive Interface job is run via batch scheduler.	Following are the business rules: Death Confirmed, do not update the Person death information and do not create tasks for the QA queue. Pending and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information with the new Reported Date of Death and do not create tasks for the QA queue. Pending and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the QA queue. Not Deceased and the newly reported date of death is after the current Person record Reported Date of Death, update the Person information as Pending with the newly Reported Date of Death and create tasks for the QA queue. If a reported date of death on the interface is a future date, disregard the record. Not Deceased and the newly reported date of death is equal to or before the current Person record Reported Date of Death, do not update the Person death information and do not create tasks for the QA queue.
13	16648	CI-111512 - DSD BR PGM 13 IMPLEMENTED	SCO Death Match Send (Response) Interface	When SCO Death Match Send (Response) Interface job is run via batch scheduler.	Following are the business rules: Report all records to SCO which are not indicated as having been reported on the SCO Death Match table (field 'Reported'). Update the Reported indicator on the SCO Death Match table once an outcome other than 'Pending' has been reported to SCO.
14	16693	CI-111513 - DSD BR PGM 14 IMPLEMENTED	Automatically terminate an active case Provider relationship upon death confirmation entered on the Modify Person screen.	Modify Person Screen. Upon confirmation of a death for a Provider in Active or On Leave status.	Terminate the Recipient/Provider relationship by: Setting the Provider status to Terminated Setting the Termination Reason to "Provider Death" Setting the Effective Date of the termination to the Date of Death
15	12343	CI-111514 - DSD BR PGM 15 IMPLEMENTED	Organization list displayed for the County Security Admin should be limited to those organizations within the current user's county, If the user is within CDSS Adult Programs Branch, then display the CDSS organization units as well as all counties.	On the Organization Units List screen	Display only those Organizations which are related to the current user (County Security Officer/Administrator) County or CDSS (CDSS Security Officer/Administrator).

16	16829	CI-116764 - DSD BR PGM 16 IMPLEMENTED	Modify User Display User Name in All Uppercase Letters	When the Save link is selected on the Modify User screen and lowercase letters were used when entering the following fields: Last Name First Name	Display the First Name and Last Name entries in all uppercase letters on the Modify User screen.
17	12360	CI-447043 - DSD BR PGM 17 IMPLEMENTED	Manage User Caseload screen	When the "Get Caseload" link is selected from the Manage User Caseload screen	Up to the first 500 cases assigned to the designated user will display. Display informational message, "This user has XXX cases, but only 500 are displayed." XXX = Total user case count
18	20823	CI-507578 - DSD BR PGM 18 IMPLEMENTED	Forward/Reassign Active Case Tasks when case is transferred in batch (700MINDN)	When case(s) is set to transferred from one case owner to another in the nightly batch AND Batch job 700MINDN is completed successfully	Transfer all scheduled cases to the new case owner AND Delete all tasks associated to the case which were manually created, for the transferred case, by the old case owner AND Any “Active” tasks associated with the case that are reserved by the old case owner are set as reserved by and assigned to the new case owner AND Assign all "Active" unreserved tasks associated with the transferred case to the new case AND Generate notification to the new case owner - 'Multiple New Cases Assigned: <# of cases> cases have been assigned to you.'
19	21106 21107	CI-813236 - DSD BR PGM 19 IMPLEMENTED	User Workspace – User ID Management – Leave	When the User Workspace displays and no active User ID Management – Leave segments exist	Display the Leave link in the Action section of the User ID Management – Leave cluster.
20	21106 21107	CI-813237 - DSD BR PGM 20 IMPLEMENTED	User Workspace – User ID Management – Leave	When the User Workspace displays and an active User ID Management – Leave segment exists	Display the End Leave link in the Action section of the User ID Management – Leave cluster as well as the date associated with the active record.

DSD 26/Recip CM & OS – Program Management, Fraud /Business Rules (21-30)

ID	Req ID	CI	Description	When	Action
21	21106 21107	CI-813238 - DSD BR PGM 21 IMPLEMENTED	User Workspace – User ID Management – Exempt from Deactivation	When the User Workspace displays and no active User ID Management – Deactivation Exemption segments exist	Display the Exempt from Deactivation link in the Action section of the User ID Management – Exempt from Deactivation cluster.
22	21106 21107	CI-813239 - DSD BR PGM 22 IMPLEMENTED	User Workspace – User ID Management – Exempt from Deactivation	When the User Workspace displays and an active User ID Management – Deactivation Exemption segment exists	Display the Remove Exemption link in the Action section of the User ID Management – Exempt from Deactivation cluster as well as the date associated with the active record.
23	21106	CI-813240 - DSD BR PGM 23 IMPLEMENTED	Reserve Assign Tasks	When the Save link is selected on the Reserve Assign Task pop-up AND the Reserve By indications is "Longest Assigned"	Assign the indicated Number of Tasks to the user Task assigned to the Work Queue the longest period of time.
24	21106	CI-813241 - DSD BR PGM 24 IMPLEMENTED	Reserve Assign Tasks	When the Save link is selected on the Reserve Assign Task pop-up AND the Reserve By indications is "Priority"	Assign the indicated Number of Tasks to the user beginning with the highest priority task, then from the oldest to the most recent. Example: If there are three (3) High priority Tasks and 27 Medium Priority Tasks and the "Number of Tasks" indicated by the user is seven (7), then the three (3) High Priority Tasks will be reserved, regardless of how long these tasks have been assigned to the Work Queue, and then the four Medium priority tasks, which have been assigned to the Work Queue the longest period of time, will also be reserved.
25	21106	CI-813242 - DSD BR PGM 25 IMPLEMENTED	Reserve Tasks From Work Queue	When the Save link is selected on the Reserve Task from Work Queue pop-up AND the Reserve By indications is "Longest Assigned"	Assign the indicated Number of Tasks to the user Task assigned to the Work Queue the longest period of time.
26	21106	CI-813243 - DSD BR PGM 26 IMPLEMENTED	Reserve Tasks From Work Queue	When the Save link is selected on the Reserve Task from Work Queue pop-up AND the Reserve By indications is "Priority"	Assign the indicated Number of Tasks to the user beginning with the highest priority task, then from the oldest to the most recent. Example: If there are three (3) High priority Tasks and 27 Medium Priority Tasks and the Number of Tasks is seven (7), then the three (3) High Priority Tasks, regardless of how long these tasks have been assigned to the Work Queue. Then the four Medium priority tasks which have been assigned to the Work Queue the longest.
27	21378	CI-823774 - DSD BR PGM 27 IMPLEMENTED	CSP 2FA - Send Verification code to email	When the user selects the Send Verification Code button from the Send Verification Code - Email Address OR When the user selects the Resend Code button from the Enter Verification Code - Email Address	A six digit code is generated and inserted into the CSP 2FA verification code email template AND IHSS - CMIPS Service Portal Verification Code (ESTE69) email is sent to the provided email address
28	21378	CI-823775 - DSD BR PGM 28 IMPLEMENTED	CSP 2FA - save and store verified email address for CSP access	When the user selects the Verify button from the Enter Verification Code - Email Address CM pop-up, CM validates the six digit code AND IF Verification code entered is valid	Update the user's valid email on the CSP Access screen AND close the pop-up AND the user is returned to the CSP access screen.

29	21378	**CI-823825** - DSD BR PGM 29 IMPLEMENTED	CSP 2FA - save and store verified phone number for CSP access	When the user selects the Verify button from the Enter Verification Code - Phone Number CM pop-up, CM validates the six digit code AND IF Verification code entered is valid	Update the user's valid phone number on the CSP Access screen AND close the pop-up AND the user is returned to the CSP access screen.
30	21378	**CI-824082** - DSD BR PGM 30 IMPLEMENTED	CSP 2FA - Send Verification Code to phone number	When the user selects the Send Verification Code button from the Send Verification Code - Phone Number CM pop-up	A six digit code is generated and included in a text message or voice message to the provided phone number. Depending on the Verification Option selected.

DSD 26/Recip CM & OS – Program Management, Fraud /Security Rules – Exceptions to Cúram Out-of-the-Box (OOTB) Location-Based Security

ID	Req ID	CI	Description	Rule	Associated Screens
1	12310 16699	CI-117818 - DSD BR PGM SR 1 IMPLEMENTED	Provider person information may be updated Statewide due to the fact a Provider may serve in more than one county.	If the type for a Person is indicated as Provider, allow update access regardless of the User's county location.	Create Address Create Alternative ID Create Phone Number Maintain Highway Address Maintain General Delivery Address Maintain Other Address Maintain PO Box Address Maintain Rural Address Maintain Street Address Modify Alternative ID Modify Person Modify Phone Number Create Note Modify Note Create Provider Modify Enrollment
2			This Business Rule was removed by CR 871		
3	12343	CI-117816 - DSD BR PGM SR 3 IMPLEMENTED	Timesheet and payroll activity may be initiated Statewide by a limited user population. This is necessary in the event of an inter-county transfer where timesheet and/or payroll related actions must be taken for service periods prior to the transfer.	If the user has a Security Role of CrossCountyPayroll, allow modify access to the specified timesheet, payroll and Provider Hours screens if the case was previously assigned to a location matching the User's location.	Timesheet Issuance Timesheet Manual Entry - Timesheet Number Timesheet Manual Entry - Time Entries Modify Timesheet Manual Entry Confirm Timesheet Cancellation View Timesheet (Release link) Confirm Timesheet Rejection Payment Correction - Timesheet Number Create Payment Correction Submit Payment Correction for Approval Cancel Payment Correction Submission Cancel Payment Correction Modify Payment Correction Approve Payment Correction Reject Payment Correction Request Void /Reissue /Replacement Cancel Void /Reissue /Replacement Request Request Copy of Cashed Warrant Modify Cashed Warrant Copy Request Cancel Cashed Warrant Copy Request Create Forged Endorsements Affidavit Modify Forged Endorsements Affidavit Cancel Forged Endorsements Affidavit Print Forged

					Endorsement Affidavit Form Create Special Transaction Create Special Transaction - Additional Options Submit Special Transaction for Approval Cancel Special Transaction Submission Cancel Special Transaction Modify Special Transaction Approve Special Transaction Reject Special Transaction Create Overpayment Occurrence Modify Overpayment Occurrence Create Overpayment Pay Period Modify Overpayment Pay Period Modify Excess Compensation Rate Details Modify Advance Payment Overpayment Details Modify Special Transaction Overpayment Details Modify Overpayment Recovery Setup Submit Overpayment Recovery Cancel Overpayment Recovery Stop Overpayment Collection Create Overpayment Collection Cancel Overpayment Collection Modify Overpayment Collection Advance Pay Recon Actions
4	12183	CI-117817 - DSD BR PGM SR 4 IMPLEMENTED	When the Inter-County Transfer Coordinator in the Receiving County access the Modify Inter-County Transfer screen	If the Receiving County is same as the County associated with the Inter-County Transfer Coordinator, allow access to the Modify Inter-County Transfer screen and "Assign Worker"	Modify Inter-County Transfer

5	12183	CI-117815 - DSD BR PGM SR 5 IMPLEMENTED	Case Worker allowed to update case and the associated Person record not assigned to their "County" when they are "Assigned Worker" for an "In-Progress" Inter-County Transfer	Allow the Assigned Worker to update the Case and associated Person information	Modify Person Create Address Maintain Highway Address Maintain General Delivery Address Maintain Other Address Maintain PO Box Address Maintain Rural Address Maintain Street Address Create Phone Number Modify Phone Number Create Note Modify Note Evidence Workspace Add New Evidence Delete Pending Evidence Check Eligibility Submit for Approval Assessment Type Modify Residence Information Create Household Members Modify Household Members Companion Case View Household Members (Delete) Modify Functional Rank Modify Assessment Narrative Create [Service Task] Modify [Service Task] Delete [Service Task] Modify Paramedical Service View Paramedical Service (Delete) Modify Protective Supervision Service View Protective Supervision (Delete) Modify Program Evidence Modify NOAs County Pay Rate Modify Manual NOAs IHSS Notification to SAWS Calculated IHSS Share of Cost Create Share of Cost Evidence Modify Share of Cost Evidence Delete Share of Cost Evidence Create Income Evidence Modify Income Evidence Delete Income Evidence Create Contact Modify Contact View Contact (Inactivate) Modify Disaster Preparedness Create Form
6	20782	CI-116809 - DSD BR PGM SR 6 IMPLEMENTED	A user with the appropriate Case Management User Role in any county may reactivate a case that has been terminated or denied in any other county.	If the user has the appropriate Case Management User Role, allow that user to reactivate a case in any county, regardless of the user's location.	Reactivate Case

7	12163	CI-451608 - DSD BR PGM SR 7 IMPLEMENTED	Tasks for a case with an "In Progress" Inter-County Transfer may be reserved by a user when the user's county code matches the "Receiving County" on the most recent Inter-County Transfer record.	Allow a user in the Receiving County subscribed to the ICT Work Queue to take an action on any task associated with the Inter-County Transfer when the Inter-County Transfer status is "In-Progress"	Reserve Task UnReserve Task Add Comment (task) Forward Task Reallocate Task Change Time Worked Close Task Defer Task Restart Task Reserve Next Task from Work Queue
8	12352	CI-451609 - DSD BR PGM SR 8 IMPLEMENTED	A supervisor of an "Assigned Inter-County Transfer Case Worker" is allowed to "Approve" or "Reject" actions taken on a an Inter-County Transfer case when not assigned to their "County" and in a "In- Progress" status	When the Assigned Worker on an "In-Progress" status Inter-County Transfer requires Supervisory Approval allow the Assigned Workers supervisor to take either the Approve Case or Reject Case actions	Approve Case Reject Case

DSD 26/Recip CM & OS – Program Management, Fraud /Tasks/Notifications

See DSD Section 30 for all CMIPS Tasks and Notifications.

DSD 26/Recip CM & OS – Program Management, Fraud /Internal Interfaces

Reference the DSD for Provider Management for the following interface related to the Public Authority – View Case Provider screen; View W-4, DE-4, W-5, DIEC Information. There are no additional internal interfaces associated with Program Management and Fraud.

DSD 26/Recip CM & OS – Program Management, Fraud /External Interfaces

DSD 26/Recip CM & OS – Program Management, Fraud /External Interfaces/SCO Death Match Receive Interface (CR 149) – CMDR109E

CI	Document Name
CI-116396 - DSD EINTF SCO Death Match Receive Interface CMDR109E IMPLEMENTED	DSD_EINTF_SCO_Death_Match_Receive_Interface_CMDR109E.doc

Internal Layout/System Mapping

Inbound

Source: Interface		Target: CMIPS			
Table Name/ File Name/WSDL Name	**Field Name**	**Field Name**	**Data Type (Format-length)**	**Description (Data Transformation rules)**	**R/O (Required or optional)**
	COUNTY	SCODEATHMATCH / COUNTYCODE	NUMERIC(2)		O
	OFFICE	SCODEATHMATCH / OFFICE	NUMERIC(2)		O
	SOCIAL WORKER NUMBER	SCODEATHMATCH / SOCIALWORKERNUMBER	STRING(4)		O
	DEATH FILE NAME	SCODEATHMATCH / DEATHFILENAME	STRING(50)		O
	DEATH DATE	SCODEATHMATCH / DATEOFDEATH	DATE (MMDDCCYY-8)		O
	DEATH SOURCE	SCODEATHMATCH / DEATHSOURCE	STRING(20)		O
	DECEDENT SSN	SCODEATHMATCH / DECEDENTSSN	STRING(9)		R
	DECEDENT DOB	SCODEATHMATCH / DECEDENTDOB	DATE (MMDDCCYY-8)		O
	RECIPIENT SSN	SCODEATHMATCH / RECIPIENTSSN	STRING(9)	Match on Alternative ID Type Social Security Number where "Duplicates" is "Blank"	O
	RECIPIENT NAME	SCODEATHMATCH / RECIPIENTNAME	STRING(50)		O
	RECIPIENT ADDRESS	SCODEATHMATCH / RECIPIENTADDRESS	STRING(50)		O
	PROVIDER SSN	SCODEATHMATCH / PROVIDERSSN	STRING(9)		O
	PROVIDER ID	SCODEATHMATCH / PROVIDERID	STRING(18)		O
	PROVIDER NAME	SCODEATHMATCH / PROVIDERNAME	STRING(50)		O
	PROVIDER ADDRESS	SCODEATHMATCH / PROVIDERADDRESS	STRING(50)		O
	WARRANT AMOUNT	SCODEATHMATCH / SCOWARRANTAMOUNT	DECIMAL(8)		O
	SCO WARRANT NUMBER	SCODEATHMATCH / SCOWARRANTNUMBER	STRING(10)		O
	SCO CLAIM SCHEDULE NUMBER	SCODEATHMATCH / SCOCLAIMSCHEDULE	NUMERIC(5)		O

	WARRANT ISSUE DATE	SCODEATHMATCH / WARRANTISSUEDATE	DATE (CCYYMMDD-8)		O
	SERVICE FROM	SCODEATHMATCH / SERVICEFROM	DATE (CCYYMMDD-8)		O
	SERVICE TO	SCODEATHMATCH / SERVICETO	DATE (CCYYMMDD-8)		O
	IHSS CASE ID	SCODEATHMATCH / IHSSCASEID	STRING(7)		O

Transaction Trigger Events

Receipt of the SCO Death Match information and a match with a CMIPS Recipient or Provider.

Processing Criteria

Match is done based on IHSS Case ID (Case Number) and DECEDENT SSN and ALTERNATEID of type SSN in CONCERNROLEALTERNATEID table. Match on Alternative ID Type Social Security Number where "Duplicates" is "Blank." The record will be ignored if no match is found. For additional details, refer to Business Process Function section 26.2.1.6. Refer to section 26.2.2.1 No. 11.

Error Processing

When all the required fields are not present in the interface file, the record will be exceptioned out and written to log file.

Related Components

Business Process Functions

Refer to section 26.2.1.6.

Business Flows

Refer to 26.2.2 Figure 14.

Business Rules

Refer to section 26.2.5.1 No. 12.

Tasks/Notifications

Refer to 26.2.7 No 11.

Screens

Refer to section 20.2.2.6 Person Home.

Reports

N/A

DSD 26/Recip CM & OS – Program Management, Fraud /External Interfaces/CDPH Death Match Receive Interface – CMMR003A

CI	Document Name
CI-116357 - DSD EINTF CDPH Death Match Receive Interface CMMR003A IMPLEMENTED	DSD_EINTF_CDPH_Death_Match_Receive_Interface_CMMR003A.doc

Internal Layout/System Mapping

Inbound

Source: Interface		Target: CMIPS			
Table Name/ File Name /WSDL Name	**Field Name**	**Field Name**	**Data Type (Format-length)**	**Description (Data Transformation rules)**	**R/O (Required or optional)**
StateFileNumber	STATE FILE NUMBER	CDPHDEATHMATCH / STATEFILENUMBER	STRING (20)		O
FirstNameOfDecendent	FIRST NAME OF DECEDENT	CDPHDEATHMATCH / FIRSTNAME	STRING (50)	Name is truncated at 50 characters	O
MiddleNameOfDecendent	MIDDLE NAME OF DECEDENT	CDPHDEATHMATCH / MIDDLENAME	STRING (50)	Name is truncated at 50 characters	O
LastNameOfDecendent	LAST NAME OF DECEDENT	CDPHDEATHMATCH / LASTNAME	STRING (50)	Name is truncated at 50 characters	O
DateOfDeath	DATE OF DEATH	PERSON /DATEOFDEATH	DATE (CCYYMMDD-8)		R
SsnOfDecendent	SSN OF DECEDENT	DEATHMATCH/SSN	STRING (9)	Match on Alternative ID Type Social Security Number where "Duplicates" is "Blank" if it exists. Otherwise match on Alternative ID Type Conversion Duplicate	R

Transaction Trigger Events

Receipt of the CDPH Death Match information and a match with a CMIPS Recipient or Provider.

Processing Criteria

Recipient or Provider SSN matches with ALTERNATEID of type SSN in CONCERNROLEALTERNATEID table and Death outcome code is blank or value is "PENDING". If death outcome code is "PENDING" then reported date of death from CDPH interface should be after reported date of death in CMIPS. Match on Alternative ID Type Social Security Number where Duplicates is "Blank." For additional details, refer to Business Process Function section 26.2.1.5. Refer to section 26.2.2.1 No. 10.

Error Processing

When all the required fields are not present in the interface file, the record will be exceptioned out and written to the log file.

Related Components

Business Process Functions

Refer to Section 26.2.1.5.

Business Flows

Refer to 26.2.2 Figure 13.

Business Rules

Refer to 26.2.5.1.

Tasks/Notifications

Refer to 26.2.7 No. 10.

Screens

Refer to 26.2.3.75 CDPH Death Match.

Refer to 26.2.3.76 View CDPH Death Match Screen.

Refer to 26.2.2.2.16 CDPH Death Match Screen Flow.

Reports

N/A

DSD 26/Recip CM & OS – Program Management, Fraud /External Interfaces/Medi-Cal Service Match Receive Interface – CMMR102B

CI	Document Name
CI-116378 - DSD EINTF Medi-Cal Service Match Receive Interface CMMR102B IMPLEMENTED	DSD_EINTF_MediCal_Service_Match_Receive_Interface_CMMR102B.doc

Internal Layout/System Mapping

Inbound

Source: Interface		Target: CMIPS			
Table Name/ File Name /WSDL Name	**Field Name**	**Field Name**	**Data Type (Format-length)**	**Description (Data Transformation rules)**	**R/O (Required or optional)**
	RECIPIENT CIN	CONCERNROLEALTERNATEID /ALTERNATEID	STRING(9)		R
	RECIPIENT LAST NAME	N/A			
	RECIPIENT FIRST NAME	N/A			
	RECIPIENT DATE OF BIRTH	N/A			
	RECIPIENT COUNTY CODE	N/A			
	SERVICE TYPE	PAIDCLAIMS/ SERVICETYPECODE	STRING(9)	Values are: LTC Inpatient	O
	SERVICE START DATE	PAIDCLAIMS/SERVICESTARTDATE	DATE (MMDDCCYY-8)		O
	SERVICE END DATE	PAIDCLAIMS/ SERVICEENDDATE	DATE (MMDDCCYY-8)		O
	IHSS START DATE	N/A			
	IHSS END DATE	N/A			
	MEDI-CAL PROVIDER NAME	PAIDCLAIMS /MEDICALPROVIDERNAME	STRING(28)		O
	SERVICE PAID AMOUNT	PAIDCLAIMS/PAIDAMT	DECIMAL(10)		O
	IHSS CLAIM COUNTY	PAIDCLAIMS/ ORIGINALCOUNTYCODE	NUMERIC(2)		O
	IHSS DISTRICT OFFICE	N/A			

Transaction Trigger Events

Receipt of the Medi-Cal service match information and a match with CMIPS Recipients.

Processing Criteria

The match is done based upon the RECIPIENT CIN and ALTERNATEID of type CIN in CONCERNROLEALTERNATEID table. The record will be ignored if matching criteria are not met. For more details, refer to Business Process Function section 26.2.1.4. Refer to section 26.2.2.1 No. 7.

Error Processing

When all the required fields are not present in the interface file, the record will be exceptioned out and written to the log file.

Related Components

Business Process Functions

Refer to section 26.2.1.4. Business Flows

Refer to section 26.2.2 Figure 10.

Business Rules

Refer to section 26.2.5.1 No 10.

Tasks/Notifications

Refer to section 26.2.7 No 8.

Screens

Refer to section 26.2.3.66 Paid Claims List.

Refer to section 26.2.3.68 View Paid Claims

Refer to section 26.2.2.2.14 Paid Claims Screen Flow

Reports

N/A

DSD 26/Recip CM & OS – Program Management, Fraud /External Interfaces/SCO Death Match Send (Response) Interface – CMMS109F

CI	Document Name
CI-116397 - DSD EINTF SCO Death Match Send Response Interface CMMS109F IMPLEMENTED	DSD_EINTF_SCO_Death_Match_Send_Response_Interface_CMMS109F.doc

Internal Layout/System Mapping

Outbound

Source: CMIPS		Target: Interface			
Table Name/ File Name /WSDL Name	**Field Name**	**Table Name/ File Name /WSDL Name**	**Field Name**	**Table Name/ File Name /WSDL Name**	**Field Name**
SCODEATHMATCH	COUNTYCODE	SCODEATHMATCH	COUNTYCODE	SCODEATHMATCH	COUNTYCODE
SCODEATHMATCH	OFFICE	SCODEATHMATCH	OFFICE	SCODEATHMATCH	OFFICE
SCODEATHMATCH	SOCIALWORKERNUMBER	SCODEATHMATCH	SOCIALWORKERNUMBER	SCODEATHMATCH	SOCIALWORKERNUMBER
SCODEATHMATCH	DEATHFILENAME	SCODEATHMATCH	DEATHFILENAME	SCODEATHMATCH	DEATHFILENAME
SCODEATHMATCH	DATEOFDEATH	SCODEATHMATCH	DATEOFDEATH	SCODEATHMATCH	DATEOFDEATH
SCODEATHMATCH	DEATHSOURCE	SCODEATHMATCH	DEATHSOURCE	SCODEATHMATCH	DEATHSOURCE
SCODEATHMATCH	DECEDENTSSN	SCODEATHMATCH	DECEDENTSSN	SCODEATHMATCH	DECEDENTSSN
SCODEATHMATCH	DECEDENTDOB	SCODEATHMATCH	DECEDENTDOB	SCODEATHMATCH	DECEDENTDOB
SCODEATHMATCH	RECIPIENTSSN	SCODEATHMATCH	RECIPIENTSSN	SCODEATHMATCH	RECIPIENTSSN
SCODEATHMATCH	RECIPIENTNAME	SCODEATHMATCH	RECIPIENTNAME	SCODEATHMATCH	RECIPIENTNAME
SCODEATHMATCH	RECIPIENTADDRESS	SCODEATHMATCH	RECIPIENTADDRESS	SCODEATHMATCH	RECIPIENTADDRESS
SCODEATHMATCH	PROVIDERSSN	SCODEATHMATCH	PROVIDERSSN	SCODEATHMATCH	PROVIDERSSN
SCODEATHMATCH	PROVIDERID	SCODEATHMATCH	PROVIDERID	SCODEATHMATCH	PROVIDERID
SCODEATHMATCH	PROVIDERNAME	SCODEATHMATCH	PROVIDERNAME	SCODEATHMATCH	PROVIDERNAME
SCODEATHMATCH	PROVIDERADDRESS	SCODEATHMATCH	PROVIDERADDRESS	SCODEATHMATCH	PROVIDERADDRESS
SCODEATHMATCH	SCOWARRANTAMOUNT	SCODEATHMATCH	SCOWARRANTAMOUNT	SCODEATHMATCH	SCOWARRANTAMOUNT
SCODEATHMATCH	SCOWARRANTNUMBER	SCODEATHMATCH	SCOWARRANTNUMBER	SCODEATHMATCH	SCOWARRANTNUMBER
SCODEATHMATCH	SCOCLAIMSCHEDULE	SCODEATHMATCH	SCOCLAIMSCHEDULE	SCODEATHMATCH	SCOCLAIMSCHEDULE
SCODEATHMATCH	WARRANTISSUEDATE	SCODEATHMATCH	WARRANTISSUEDATE	SCODEATHMATCH	WARRANTISSUEDATE
SCODEATHMATCH	SERVICEFROM	SCODEATHMATCH	SERVICEFROM	SCODEATHMATCH	SERVICEFROM
SCODEATHMATCH	SERVICETO	SCODEATHMATCH	SERVICETO	SCODEATHMATCH	SERVICETO
SCODEATHMATCH	SCODEATHMATCH / IHSSCASEID	SCODEATHMATCH	SCODEATHMATCH / IHSSCASEID	SCODEATHMATCH	SCODEATHMATCH / IHSSCASEID
SCODEATHMATCH	OUTCOME	SCODEATHMATCH	OUTCOME	SCODEATHMATCH	OUTCOME
SCODEATHMATCH	OUTCOMEDATE	SCODEATHMATCH	OUTCOMEDATE	SCODEATHMATCH	OUTCOMEDATE
SCODEATHMATCH	SOCIALWORKERNUMBER	SCODEATHMATCH	SOCIALWORKERNUMBER	SCODEATHMATCH	SOCIALWORKERNUMBER

Transaction Trigger Events

Each month CMIPS will return a file to SCO that will provide information on the outcome or current status of a death investigation for each warrant reported by SCO that had not been previously reported as adjudicated.

Refer to section 26.2.2.1 Business Function ID 11 "SCO Death Match."

Processing Criteria

SCO Death Match response record will be sent if REPORTEDIND in SCODEATHMATCH table is set to true. REPORTEDIND in SCODEATHMATCH record will be always be set to true when record was created. REPORTEDIND will be set to false if the record was processed in response file and death outcome code is other than "PENDING". For more details, refer to Business Process Function section 26.2.1.6.

Error Processing

When all the required fields are not present in CMIPS, the error will write to the log file.

Related Components

Business Process Functions

Refer to Section 26.2.1.6.

Business Flows

Refer to section 26.2.2 Figure 15.

Business Rules

Refer to section 26.2.5.1 No. 13.

Tasks/Notifications

N/A

Screens

N/A

Reports

Refer to section 28.56 SCO Death Match Response Report.

DSD 26/Recip CM & OS – Program Management, Fraud /External Interfaces/Treatment Authorization Request (TAR) Interface – CMWR102D

CI	Document Name
CI-116404 - DSD EINTF Treatment Authorization Request TAR Interface CMWR102D IMPLEMENTED	DSD_EINTF_Treatment_Authorization_Request_TAR_Interface_CMWR102D.doc

Internal Layout/System Mapping

Inbound

Source: Interface		Target: CMIPS			
Table Name/ File Name /WSDL Name	**Field Name**	**Field Name**	**Data Type (Format-length)**	**Description (Data Transformation rules)**	**R/O (Required or optional)**
	RECIPIENT CIN	CONCERNROLEALTERNATEID /ALTERNATEID	STRING(9)		R
	RECIPIENT LAST NAME	N/A			
	RECIPIENT FIRST NAME	N/A			
	RECIPIENT DATE OF BIRTH	N/A			
	SERVICE TYPE	N/A			
	STATUS OF REQUEST	N/A			
	UNITS REQUESTED /APPROVED	N/A			
	START DATE	N/A			
	END DATE	N/A			

Transaction Trigger Events

Receipt of the TAR information and a match with CMIPS Recipients.

Processing Criteria

Match is done based upon the RECIPIENT CIN and ALTERNATEID of type CIN in CONCERNROLEALTERNATEID table. The record will be ignored if the matching criterion is not met. For more details, refer to Business Process Function 26.2.1.6. Refer to section 26.2.2.1 No. 6.

Error Processing

When all the required fields are not present in interface file, the record will be exceptioned out and written to the log file.

Related Components

Business Process Functions

N/A

Business Flows

Refer to 26.2.2 Figure 9.

Business Rules

Refer to section 26.2.5.1 No 6.

Tasks/Notifications

Refer to 26.2.7 No 4.

Screens

N/A

Reports

N/A

DSD 26/Recip CM & OS – Program Management, Fraud /Batch Processing

There following Batch Processes are associated with Recip CM & OS – Program Management and Fraud.

Batch Process Name	CI	Description	Estimated Size (Records)	Frequency	Send Receive Maintenance
TAR Receive (CMWR102D)	CI-69471 - DSD BTCH PRO CRM cmwr102d IMPLEMENTED	DHCS will provide CMIPS with information on Pending and Approved Medi-Cal Treatment Authorization Requests (TARs) for Long Term Care (LTC), Inpatient services and Adult Day Health Care (ADHC) Weekly.		Weekly	Receive
Medi-Cal Service Match (CMMR102B)	CI-69470 - DSD BTCH PRO CRM cmmr102b IMPLEMENTED	Every month the CMIPS system will receive an electronic file from DHCS that contains data for IHSS Recipients who had Long Term Care or In-Patient in the same timeframe that there was a paid claim for IHSS services.		Monthly	Receive
CDPH Death Match Interface (CMMR003A)	CI-69468 - DSD BTCH PRO CRM cmmr003a IMPLEMENTED	This interface is provided by CDPH and details death information reported to the CDPH.		Monthly	Receive
SCO Death Match Receive Interface (CMDR109E)	CI-69469 - DSD BTCH PRO CRM cmdr109e IMPLEMENTED	This interface will be provided by SCO and will detail information on warrants issued for individuals who are indicated as deceased in the SCO auditor's death match database.		Daily	Receive
SCO Death Match Send (Response) Interface (CMMS109F)	CI-69467 - DSD BTCH PRO CRM cmms109f IMPLEMENTED	This interface will provide a response to SCO with outcome information for the transactions previously reported by SCO.		Monthly	Send
Targeted Mailing (700AINRR)	CI-116324 - DSD BTCH PRO CRM 700ainrr IMPLEMENTED	This batch program reads an input file of Recipient and Provider numbers and creates a "slip page" with the name and address for the Recipient or Provider for insert into a window envelope along with the targeted mailing insert. If there are duplicate records included on the input file based upon a person meeting multiple criteria for the targeted mailing, a single letter should be sent. Duplicates should be removed for the mailing purposes. This program will also create a record in the data base table for tracking targeted mailings. A record should be created for each record on the input file, so that if an individual was selected based upon multiple criteria, all criteria will be reflected in the data table.	Unknown	Quarterly	Maintenance
New FLSA Targeted Mailing for Recipients (700BINRN)	CI-464034 - DSD BTCH PRO CRM 700binrn IMPLEMENTED	For IHSS Recipients with a Case Status of Pending, Eligible, Presumptive Eligible or Leave at the time of printing this program creates a "slip page" with the name and address for each Recipient for insertion into a window envelope along with the targeted mailing insert.	525,000	As Requested	Maintenance
New FLSA Targeted Mailing for Providers (700CINRN)	CI-464036 - DSD BTCH PRO CRM 700cinrn IMPLEMENTED	For IHSS Providers in an Active or Leave status, or who have a value of 'Pending' or 'Pending Reinstatement' in the ELIGIBILITY field at the time of printing this program creates a "slip page" with the name and address for each Provider for insertion into a window envelope along with the targeted mailing insert.	550,000	As Requested	Maintenance
Bulk Caseload Transfer (700MINDN)	CI-818774 - DSD BTCH PRO CRM p 700mindn IMPLEMENTED	This batch job processes bulk caseload transfer requests.	Variable	Daily	Maintenance

DSD 26/Recip CM & OS – Program Management, Fraud /Reports

See DSD Section 28A, 28B, 28C or 28D for all CMIPS Reports.

DSD 26/Recip CM & OS – Program Management, Fraud /Forms

There are no forms associated with Program Management, Fraud.

DSD 26/Recip CM & OS – Program Management, Fraud /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.

Please reference DSD Section 20.3 for the code table: Sensitivity

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Task Forward to Type

Table – Code Table: TaskForwardToType

CI	Document Name
CI-68012 - DSD CT TaskForwardToType IMPLEMENTED	DSD_CT_TaskForwardToType.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
TIT9	User	Yes	1	No	Yes	
RL23	Work Queue	No	2	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Work Queue Type

CI	Document Name
CI-68017 - DSD CT WorkQueueType IMPLEMENTED	DSD_CT_WorkQueueType.doc

Table – Code Table: WorkQueueType

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
WQT201	Timesheet Errors	No	1	No	Yes	
WQT202	Timesheet Eligibility Errors	No	2	No	Yes	
WQT203	Timesheets on Hold	No	3	No	Yes	
WQT204	Timesheets Over 70%	No	4	No	Yes	
WQT205	Payroll Supervisor	No	5	No	Yes	
WQT206	Payments Pending Approval	No	6	No	Yes	
WQT207	QA	No	7	No	Yes	
WQT208	Provider Management	No	8	No	Yes	
WQT209	WPCS	No	9	No	Yes	
WQT210	ICT Coordinator	No	10	No	Yes	
WQT211	Homemaker Supervisor	No	11	No	Yes	
WQT212	County Contractor Coordinator	No	12	No	Yes	
WQT213	QA Supervisor	No	13	No	Yes	
WQT214	CDSS Payments Pending Approval	No	14	No	Yes	
WQT215	County Overtime Violations	No	15	No	Yes	
WQT216	Supervisor Overtime Violations	No	16	No	Yes	
WQT217	CDSS Career Pathways	No	17	No	Yes	
WQT218	Provider Electronic Forms	No	18	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/CMIPSII Location Type

Table – Code Table: CMIPSIILocationType

CI	Document Name
CI-68008 - DSD CT CMIPSIILocationType IMPLEMENTED	DSD_CT_CMIPSIILocationType.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
LT4	State	No	1	No	Yes	
LT2	County	No	2	No	Yes	
LT100	District Office	No	3	No	Yes	
LT3	Region	No	4	No	Yes	
LT102	Adult Protective Services	No	5	No	Yes	
LT101	Public Authority	No	6	No	Yes	
LT103	Medi-Cal Office	No	7	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Task Priority

Table – Code Table: TaskPriority[1]

CI	Document Name
CI-68018 - DSD CT TaskPriority IMPLEMENTED	DSD_CT_TaskPriority.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
TP1	High	No	1	No	Yes	
TP2	Medium	No	2	No	Yes	
TP3	Low	No	3	No	Yes	

[1] Cúram OOTB

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Person Title

Table – Code Table: PersonTitle[2]

CI	Document Name
CI-68007 - DSD CT PersonTitleType IMPLEMENTED	DSD_CT_PersonTitleType.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
PROF	Prof	No	1	No	Yes	
REVERENT	Reverend	No	2	No	Yes	
MR	Mr.	No	3	No	Yes	
MRS	Mrs.	No	4	No	Yes	
MS	Ms.	No	5	No	Yes	
DR	Dr.	No	6	No	Yes	
MIS	Miss	No	7	No	Yes	

[2] Cúram OOTB

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Application Code

Table – Code Table: ApplicationCode

CI	Document Name
CI-68014 - DSD CT ApplicationCode IMPLEMENTED	DSD_CT_ApplicationCode.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
ADMINAPP	Admin_workspace	No	1	No	Yes	DXC Internal Only
DefaultApp	Application_workspace	Yes	2	No	Yes	
CTYSYSADMN	CountySysAdmin_workspace	No	5	No	Yes	
SYSADMAPP	SysAdmin_workspace	No	7	No	Yes	DXC Internal Only
PAApp	PublicAuthority_workspace	No	8	No	Yes	
NewWrkrApp	NewWorker_workspace	No	9	No	Yes	
HMSApp	HMSApplication_workspace	No	10	No	No	Homemaker Supervisor (not used at this time)
CDSSSYSADM	CDSSSysAdmin_workspace	No	11	No	Yes	
HLPDSKAPP	HelpDesk_workspace	No	12	No	Yes	DXC Internal Only
CDSSFISC	FiscalApp_workspace	No	13	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Wage Rate Type

Table – Code Table: WageRateType

CI	Document Name
CI-68011 - DSD CT WageRateType IMPLEMENTED	DSD_CT_WageRateType.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
PMWT01	Public Authority	No	1	No	Yes	
PMWT02	Non Profit Consortium	No	2	No	Yes	
PMWT03	Joint Powers Agreement	No	3	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/QA Assessment Review Type

Table – Code Table: QAAssessmentReviewType

CI	Document Name
CI-68005 - DSD CT QAAssessmentReviewType IMPLEMENTED	DSD_CT_QAAssessmentReviewType.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
QART01	Desk	No	1	No	Yes	
QART02	In-Home	No	2	No	Yes	
QART03	Phone	No	3	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Investigation Referred To

Table – Code Table: InvestigationReferredTo

CI	Document Name
CI-68015 - DSD CT InvestigationReferredTo IMPLEMENTED	DSD_CT_InvestigationReferredTo.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
QIRT01	DHCS	No	1	No	Yes	
QIRT02	Local Entity	No	2	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Investigation Outcome

Table – Code Table: InvestigationOutcome

CI	Document Name
CI-68013 - DSD CT InvestigationOutcome IMPLEMENTED	DSD_CT_InvestigationOutcome.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
QIOU01	Completed Substantiated	No	1	No	Yes	
QIOU02	Completed Unsubstantiated	No	2	No	Yes	
QIOU03	Completed Inconclusive	No	3	No	Yes	
QIOU04	Completed without Investigation	No	4	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Paid Claim Outcome

Table – Code Table: PaidClaimOutcome

CI	Document Name
CI-68010 - DSD CT PaidClaimOutcome IMPLEMENTED	DSD_CT_PaidClaimOutcome.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
QPC001	Pending	No	1	No	Yes	
QPC002	Referred for Investigation	No	2	No	Yes	
QPC003	Referred for Overpayment	No	3	No	Yes	
QPC004	Closed – No Duplication	No	4	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Paid Claim Service Type

Table – Code Table: PaidClaimServiceType

CI	Document Name
CI-68009 - DSD CT PaidClaimServiceType IMPLEMENTED	DSD_CT_PaidClaimServiceType.doc

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
QPCS01	LTC	No	1	No	Yes	
QPCS02	Inpatient	No	2	No	Yes	
QPCS03	Adult Day Health Care	No	3	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Reserve Tasks

Table – Code Table: Reserve Tasks

CI	Document Name
CI-813256 - DSD CT SW Reserve Tasks IMPLEMENTED	DSD_CT_SW_Reserve_Tasks.docx

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
RT01	Longest Assigned	Yes	1	No	Yes	
RT02	By Priority	No	2	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Organization Object Type

Table – Code Table: Organization Object Type

CI	Document Name
CI-813255 - DSD CT Org Object Type IMPLEMENTED	DSD_CT_Org_Object_Type.docx

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
OOT01	User	Yes	1	No	Yes	
OOT02	Work Queue	No	2	No	No	
OOT03	Organization Unit	No	3	No	No	
OOT04	Position	No	4	No	No	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Supervisor Approval Required

Table – Code Table: Supervisor Approval Required

CI
CI-822564 - DSD CT Supervisor Approval Required IMPLEMENTED

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SAR001	All	No	N/A	No	Yes	
SAR002	By Category	No	N/A	No	Yes	
SAR003	None	No	N/A	No	Yes	

DSD 26/Recip CM & OS – Program Management, Fraud /Code Table Definitions/Death Outcome

CI	Document Name
CI-68053 - DSD CT DeathOutcome IMPLEMENTED	DSD_CT_DeathOutcome.doc

Table: Code Table: DeathOutcome

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
DO001	Pending	No	1	No	Yes	System Generated or Selectable by User
DO002	Not Deceased – Payee met, SS card & ID viewed	No	2	No	Yes	Selectable by User
DO003	Not Deceased – Payee met, SS card & ID on file	No	3	No	Yes	Selectable by User
DO004	Deceased – No Overpayment	No	4	No	Yes	Selectable by User
DO005	Deceased – Overpayment, recovery initiated	No	5	No	Yes	Selectable by User
DO006	Deceased – Overpayment, fraud referral initiated	No	6	No	Yes	Selectable by User

DSD 26/Recip CM & OS – Program Management, Fraud /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.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/County Contractor

Table – CountyContractor

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
countyContractorID	BIGINT	8	No	N/A	Primary key for the CountyContractor table.
countyCode	CHARACTER	10	Yes	N/A	The two-digit numeric code for the California county.
contractorName	CHARACTER	60	Yes	County Contractor Rate - Contractor Name	The name of the county contractor.
rateAmt	DECIMAL	31	Yes	County Contractor Rate - Rate	The rate charged for service provided.
wageAmt	DECIMAL	31	No	County Contractor Rate - Wage	The wage paid to contractor workers.
macrAmt	DECIMAL	31	Yes	County Contractor Rate - MACR	The maximum allowable county rate.
fromDate	DATE	4	Yes	County Contractor Rate - Effective Date	The effective date of the contractor in CMIPS.
toDate	DATE	4	Yes	County Contractor Rate – End Date	The end date of the contractor in CMIPS.
countyContractorNumber	CHARACTER	6	Yes	N/A	Vendor Identification
biMonthlyInvoiceInd	CHARACTER	1	No	N/A	Y or N

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/County Wage Rate

Table – CountyWageRate

Field Name	Field Data type	Size	Null	Screen Name-Field Name	Comments
countyWageRateID	BIGINT	8	No	NA	Primary key of the CountyWageRate table.
countyCode	CHARACTER	10	Yes	NA	The two-digit numeric code for the California county.
fromDate	DATE	4	Yes	Public Authority Wage Rate - Effective Date	Effective Date of rate
toDate	DATE	4	Yes		End date of the rate
typeCode	CHARACTER	10	Yes	Public Authority Wage Rate - Type	The type of the rate (PA, Joint Powers Agreement, Nonprofit).
rateAmt	DECIMAL	31	Yes	Public Authority Wage Rate - Rate	Contractor Rate
wageAmt	DECIMAL	31	Yes	Wage	Contractor Wage
nonstateShareOverAmt	DECIMAL	31	Yes	Public Authority Wage Rate - Non-State Share Over	Non-State Share Over the State Allowed rate for reimbursement
adminRateAmt	DECIMAL	31	Yes	Public Authority Wage Rate -Admin Rate	Admin Rate
estimatedTaxesAmt	DECIMAL	31	Yes	Public Authority Wage Rate - Estimated Taxes	Estimated Taxes
stateSharedAmt	DECIMAL	31	Yes	Public Authority Wage Rate - State Shared	Health Benefit State Shared
notStateSharedAmt	DECIMAL	31	Yes	Public Authority Wage Rate - Non-State Share Over	Health Benefit Not State Shared
nonhealthBenefitsAmt	DECIMAL	31	Yes	Public Authority Wage Rate - Non-Health Benefits	Non-Health Benefits

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Treatment Auth Request

Table – TreatmentAuthRequest

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
treatmentAuthRequestID	BIGINT	8	No	NA	Primary key for the TreatmentAuthRequest table
caseID	BIGINT	8	No	NA	Foreign key for CaseHeader table.
serviceTypeCode	CHARACTER	10	Yes	NA	The type of service (LTC, Inpatient, ADHC).
requestStatusCode	CHARACTER	10	Yes	NA	The start date of the service requested.
startDate	DATE	4	Yes	NA	
endDate	DATE	4	Yes	NA	The end date of the service requested.
units	INTEGER	4	Yes	NA	The units requested.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Users

Table – Users

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
firstAltLanguage	CHARACTER	10	Yes	User Home – Primary Alternate Language	The Users first language besides English.
secondAltLanguage	CHARACTER	10	Yes	User Home – Secondary Primary Alternate Language	The Users second language besides English.
workerNumber	CHARACTER	4	Yes	User Home – Worker Number	The legacy worker that identifies the social worker within the county.
caseCount	INTEGER	4	No	User Search – Case Count	The number of cases assigned to the User.
officePhoneID	BIGINT	8	Yes	NA	

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/User Zip Code

Table – UserZipCode

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
userZipCodeID	BIGINT	8	No	NA	Primary key for UserZipCode table
userName	CHARACTER	30	No	User Zip Codes – User	Foreign key to users
zipCode	CHARACTER	5	No	User Zip Codes – Zip Code	A ZIP code for with a user (Social Worker) provides service.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Death Match

Table – DeathMatch

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
deathMatchID	BIGINT	8	No	NA	A system-generated unique record identifier.
ssn	CHARACTER	18	Yes	View Death Match – Decedent SSN	The SSN of the reported.
reportedName	CHARACTER	50	Yes	NA	Name of the reported.
reportedDateOfDeath	DATE	4	Yes	Person Home – Reported Date of Death	The person's date of death as reported.
notificationDate	DATE	4	Yes	NA	The date the notification was received.
deathMatchTypeCode	CHARACTER	10	Yes	Person Home - Death Notification Source Modify Person - Death Notification Source	The type of death match (CDPH, SCO).

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/CDPH Death Match

Table – Code Table – CDPHDeathMatch

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
cdhpDeathMatchID	BIGINT	8	No	NA	A system-generated unique record identifier.
deathMatchID	BIGINT	8	No	NA	The foreign key to the death match entity.
caseReference	CHARACTER	200	Yes	NA	The case number (only for Recipients).
countyCode	CHARACTER	10	Yes	NA	The county in which the case is active.
stateFileNumber	CHARACTER	20	Yes	View CDPH Death Match – State File Number	From CDPH interface file
revisionID	CHARACTER	20	Yes	N/A	No longer received with CR 1222
firstName	CHARACTER	56	Yes	View CDPH Death Match – First Name	The first name of the person who has been reported as dead.
middleName	CHARACTER	56	Yes	View CDPH Death Match – Middle Name	The middle name of the person who has been reported as dead.
lastName	CHARACTER	56	Yes	View CDPH Death Match – Last Name	The last name of the person who has been reported as dead.
dateOfBirth	DATE	4	Yes	N/A	No longer received with CR 1222
ageInYears	INTEGER	4	Yes	N/A	No longer received with CR 1222
gender	CHARACTER	10	Yes	N/A	No longer received with CR 1222
maritalStatus	CHARACTER	10	Yes	N/A	No longer received with CR 1222
motherFirstName	CHARACTER	56	Yes	N/A	No longer received with CR 1222
motherMaidenName	CHARACTER	56	Yes	N/A	No longer received with CR 1222
fatherFirstName	CHARACTER	56	Yes	N/A	No longer received with CR 1222
fatherLastName	CHARACTER	56	Yes	N/A	No longer received with CR 1222
spouseFirstName	CHARACTER	56	Yes	N/A	No longer received with CR 1222
spouseLastName	CHARACTER	56	Yes	N/A	No longer received with CR 1222
residenceStreet	CHARACTER	50	Yes	N/A	No longer received with CR 1222
residenceCity	CHARACTER	50	Yes	N/A	No longer received with CR 1222
residenceCounty	CHARACTER	50	Yes	N/A	No longer received with CR 1222
cityOfDeath	CHARACTER	50	Yes	N/A	No longer received with CR 1222
countyOfDeath	CHARACTER	255	Yes	View CDPH Death Match – County of Death	The name of the county where the person died.
concernRoleID	BIGINT	8	No	System-generated	Foreign key to ConcernRole.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/SCO Death Match

Table – ScoDeathMatch

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
scodeathMatchID	BIGINT	8	No	NA	A system-generated unique record identifier.
deathMatchID	BIGINT	8	No	NA	The foreign key to the death match entity.
deathFileName	CHARACTER	50	Yes	NA	
decedentSsn	CHARACTER	18	Yes	NA	SSN of SCO reported Decedent.
decedentDob	DATE	4	Yes	NA	DOB of SCO reported Decedent.
RecipientSsn	CHARACTER	9	Yes	NA	SSN of the Recipient indicated on the issued warrant.
RecipientName	CHARACTER	50	Yes	NA	Name of the Recipient indicated on the issued warrant.
RecipientAddress	CHARACTER	50	Yes	NA	Address of the Recipient indicated on the issued warrant.
ProviderSsn	CHARACTER	18	Yes	NA	SSN of the Provider indicated on the issued warrant.
ProviderID	CHARACTER	18	Yes	NA	ID of the Provider indicated on the issued warrant.
ProviderName	CHARACTER	50	Yes	NA	Name of the Provider indicated on the issued warrant.
ProviderAddress	CHARACTER	50	Yes	NA	Address of the Provider indicated on the issued warrant
ihssCaseID	CHARACTER	40	Yes	NA	The case number on the issued warrant.
socialWorkerNumber	CHARACTER	4	Yes	NA	The unique identifier of the Social Worker who authorized the issued warrant.
countyCode	CHARACTER	4	Yes	NA	The county from which the warrant was issued.
office	CHARACTER	4	Yes	NA	The office from which the warrant was issued.
scoDateOfDeath	DATE	4	Yes	NA	
scoWarrantAmount	DECIMAL	31	Yes	NA	The amount paid on the issued warrant.
scoWarrantNumber	CHARACTER	10	Yes	NA	The warrant number on the issued warrant.
scoClaimSchedule	CHARACTER	6	Yes	NA	The claim schedule number under which that warrant was issued.
warrantIssueDate	DATE	4	Yes	NA	The date the warrant was issued.
serviceFrom	DATE	4	Yes	NA	Pay period Begin Date for the issued warrant
serviceTo	DATE	4	Yes	NA	Pay period end date for the issued warrant.
outcome	CHARACTER	50	Yes	NA	
outcomeDate	DATE	4	Yes	NA	
dateofDeath	DATE	4	Yes	NA	
reportedInd	CHARACTER	1	No	NA	Indicates whether or not the outcome has been reported back to SCO.
reportedDate	DATE	4	Yes	NA	The date the outcome was reported back to SCO.
outcomeWorkerNumber	CHARACTER	10	Yes	NA	The worker is the unique identifier for entry of outcome (may be the same as updated by).
deathSource	Character	20	No	NA	The SCO source of death information
concernRoleID	BIGINT	8	No	System-generated	Foreign key to ConcernRole.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Assessment Review

Table – AssessmentReview

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
assessmentReviewID	BIGINT	8	No	NA	Primary key.
caseID	BIGINT	8	No	NA	Foreign key to CaseHeader.
reviewTypeCode	CHARACTER	10	Yes	QA Assessment Review List-Review Type Create QA Assessment Review- Review Type Modify QA Assessment Review- Review Type	The assessment review type (In-Home, Desk, Phone).
targetedReviewInd	CHARACTER	1	No	QA Assessment Review List- Targeted Review Create QA Assessment Review- Targeted Review Modify QA Assessment Review- Targeted Review	Indicates whether or not the assessment review is targeted.
reviewCompletedDate	DATE	4	Yes	QA Assessment Review List- Date Review Completed Create QA Assessment Review- Date Review Completed Modify QA Assessment Review- Date Review Completed	The date the assessment review was completed.
reviewerName	CHARACTER	30	No	QA Assessment Review List- QA Reviewer Name Create QA Assessment Review List- QA Reviewer Name Modify QA Assessment Review List- QA Reviewer Name	Foreign key to users.
correctiveActionDueDate	DATE	4	Yes	QA Assessment Review List- Corrective Action Due Date Create QA Assessment Review- Corrective Action Due Date Modify QA Assessment Review- Corrective Action Due Date	The due date of the corrective action.
caseRemediationDate	DATE	4	Yes	QA Assessment Review List- Case Remediation Date Create QA Assessment Review - Case Remediation Date Modify QA Assessment Review - Case Remediation Date	The case remediation date.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Case Investigation

Table – CaseInvestigation

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
caseInvestigationID	BIGINT	8	No	NA	Primary key.
caseID	BIGINT	8	No	NA	Foreign key to CaseHeader.
caseReferredToCode	CHARACTER	10	Yes	Case Investigation Referral List - Case Referred To Create Case Investigation Referral – Case Referred To Modify Case Investigation Referral – Case Referred To	The entity the case was referred to. Valid options are DHCS, Local Entity.
caseReferredDate	DATE	4	Yes	Case Investigation Referral List – Date Case Referred Create Case Investigation Referral – Date Case Referred Modify Case Investigation Referral – Date Case Referred	The date the case was referred to the entity.
investigatedConcernRoleID	BIGINT	8	Yes	NA	Foreign key to ConcernRole. The name of the Provider referred for investigation. If a Provider is not indicated, the Recipient is referred for investigation.
investigationOutcomeCode	CHARACTER	10	Yes	Case Investigation Referral List – Case Investigation Outcome Create Case Investigation Referral – Case Investigation Outcome Modify Case Investigation Referral – Case Investigation Outcome	The case investigation outcome.
investigationOutcomeDate	DATE	4	Yes	Case Investigation Referral List – Case Investigation Outcome Date Create Case Investigation Referral – Case Investigation Outcome Date Modify Case Investigation Referral – Case Investigation Outcome Date	The date of the case investigation outcome.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Paid Claims

Table – PaidClaims

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
paidClaimsID	BIGINT	8	No	NA	Primary key.
caseID	BIGINT	8	No	NA	Foreign key to CaseHeader.
serviceType Code	CHARAC TER	10	Yes	Paid Claims List - Service Type View Paid Claim – Service Type Modify Paid Claim – Service Type	The type of service. Valid values are (LTC, Inpatient).
serviceStart Date	DATE	4	Yes	Paid Claims List - Service Start Date View Paid Claim – Service Start Date Modify Paid Claim – Service Start Date	The begin date of the service.
serviceEnd Date	DATE	4	Yes	Paid Claims List - Service End Date View Paid Claim – Service End Date Modify Paid Claim – Service End Date	The end date of the service.
mediCalPro viderName	VARCHAR	200	Yes	View Paid Claim – Medi-Cal Provider Name Modify Paid Claim – Medi-Cal Provider Name	Name of the Medi-Cal service Provider.
paidAmt	DECIMAL	31	Yes	View Paid Claim – Amount Paid Modify Paid Claim – Amount Paid	The amount of money paid for the service.
outcomeCo de	CHARAC TER	10	Yes	Paid Claims List - Outcome Modify Paid Claim – Outcome View Paid Claim – Outcome	The outcome of the investigation.
outcomeDate	DATE	4	Yes	Paid Claims List – Outcome Date Modify Paid Claim – Outcome Date View Paid Claim – Outcome Date	The outcome date.
overpaymen tAmt	DECIMAL	31	Yes	NA	The total overpayment amount (entered sum of all IHSS Provider overpayments resulting from the investigation).
originalCou ntyCode	CHARAC TER	10	Yes	NA	Received from DHCS which will reflect the original county the timesheet was placed in. This will be different from the current county in the event of ICT (intercounty transfer).

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/County Homemaker Rate

Table – CountyHomemakerRate

Field Name	Field Data type	Size	Null	Screen Name – Field Name	Comments
countyWageRateID	BIGINT	8	No	NA	The primary key
countCode	CHARACTER	10	Yes	NA	The two-digit numeric code for the California county.
fromDate	DATE	4	Yes	NA	Effective date of rate.
toDate	DATE	4	Yes	NA	End date of rate.
rateAmt	DECIMAL	31	Yes	NA	Homemaker rate.

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Targeted Mailing

Table – TargetedMailing

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
caseID	BIGINT	8	No	NA	Internal system assigned
caseParticipantRoleID	BIGINT	8	Yes	NA	Internal system assigned
targetedMailingDate	DATE	4	No	Generated from the Targeted Mailing batch process	
targetedMailingCriteria	CHARACTER	50	No	Generated from the Targeted Mailing batch process	
targetedMailingID	BIGINT	8	No	NA	The primary key

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Work Queue Task DO

Table – WorkQueueTaksDO

Field	Type	Length	Nulls	Screen Name – Field Name	Comments
WORKQUEUETASKIDDO	BIGINT	8	No	N/A	
TASKID	BIGINT	8	Yes	N/A	
DISTRICTOFFICE	Character	50	Yes	N/A	
CASENUMBER	Character	40	Yes	N/A	
CASENAME	Character	56	Yes	N/A	
VERSIONNO	INTERGER	4	No	N/A	

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/User Management

Table – Table Name: UserIDMgmt

Field	Type	Length	Nulls	Screen Name – Field Name	Comments
UserIDMgmtID	BIGINT	8	No	System Generated	Primary key to the table
userLeaveDate	DATE	10	Yes	Leave Date	Social Worker's Leave Date
userDeactivateExemptDate	DATE	10	Yes	Deactivation Exemption Date	Social Worker's Deactivation Exemption Date
recordStatus	CHARACTER	10	Yes	N/A	The record status (Active or Inactive)
createdOn	DATETIME	8	No	NA	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	No	NA	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	No	NA	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	No	NA	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	NA	System Generated – How many times the record modified.
userName	CHARACTER	30	No	User Workspace – User ID Management	User Name of individual who is either on Leave or Exempt from Deactivation

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/User Management Snapshot

Table – Table Name: UserIDMgmtSnapshot

Field	Type	Length	Nulls	Screen Name – Field Name	Comments
UserIDMgmtSnapshotID	BIGINT	8	No	System Generated	Primary key to the table
UserIDMgmtID	BIGINT	8	No	System Generated	Foreign key to UserIDMgmt table
userLeaveDate	DATE	10	Yes	Leave Date	Social Worker's Leave Date
userDeactivateExemptDate	DATE	10	Yes	Deactivation Exemption Date	Social Worker's Deactivation Exemption Date
recordStatus	CHARACTER	10	Yes	N/A	The record status (Active or Inactive)
createdOn	DATETIME	8	No	NA	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	No	NA	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	No	NA	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	No	NA	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	NA	System Generated – How many times the record modified.
userName	CHARACTER		No		

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/Work Queue

Table – Table Name: WorkQueue

Field	Type	Length	Nulls	Screen Name – Field Name	Comments
WORKQUEUEID	BIGINT	8	No	System Generated	Primary key to the table
NAME	CHARACTER	150	No	N/A	
ALLOWUSERSUBSCRIPTIONIND	CHARACTER	1		N/A	
SENSITIVITY	CHARACTER	10		N/A	
ADMINISTRATORUSERNAME	CHARACTER	30		N/A	
COMMENTS	CHARACTER	200		N/A	
UPPERNAME	CHARACTER	150		N/A	
UPERADMINISTRATORUSERNAME	CHARACTER	30		N/A	
VERSIONNO	INTERGER	4		N/A	
LASTWRITTEN	TIMESTAMP	10		N/A	

DSD 26/Recip CM & OS – Program Management, Fraud /Database Entities/CSP User Info

Table – CSPUSERINFO

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
cspUserInfoID	BIGINT	8	Primary Key	N/A	Primary Key
userName	CHARACTER	7	Yes	N/A	CM county worker user name
Emailaddress	CHARACTER	50	Yes	N/A	Email address of county user
phoneNumber	CHARACTER	10	Yes	N/A	Phone number of county user
emailVerificationCount	INTEGER	5	Yes	N/A	Count of email verification attempts
PhoneVerficiationCount	INTEGER	5	Yes	N/A	Count of phone verification attempts
emailVerificationCode	CHARACTER	6	Yes	N/A	Email verification code
phoneVerificationCode	CHARACTER	6	Yes	N/A	Phone verification code
isEmailVerified	INTEGER	1	Yes	N/A	Successfully verified email address
isPhoneVerified	INTEGER	1	Yes	N/A	Successfully verified phone number
emailVerificationCodeCreatedOn	DATETIME	8	Yes	N/A	Timestamp of email code
phoneVerificationCodeCreatedOn	DATETIME	8	Yes	N/A	Timestamp of Phone code
createdby	CHARACTER	30	Yes	NA	Audit Field - The record created by.
createdon	DATETIME	8	Yes	N/A	Audit Field - The record created on.
lastupdatedon	DATETIME	8	Yes	NA	Audit Field - The record modified time stamp.
lastupdatedby	CHARACTER	30	Yes	NA	Audit Field – The last user who updated the record
versionno	INTEGER	4	No	NA	Version no of the record

DSD 26/Recip CM & OS – Program Management, Fraud /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 solution. 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.

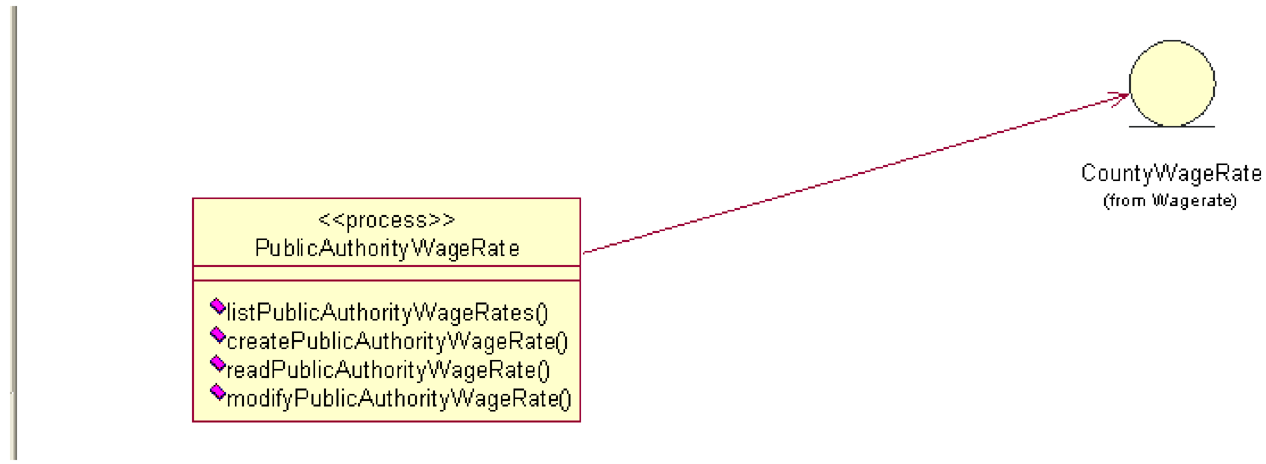
At a high-level each business class definition will include:

- 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:

- Specification
- Methods
- Parameters
- Exceptions
- Constraints
- Visibility

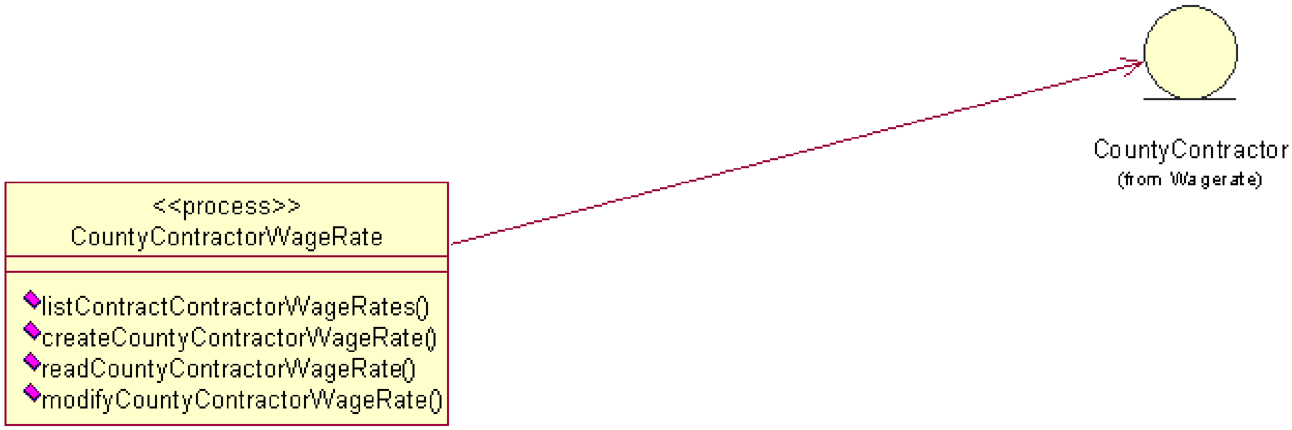
DSD 26/Recip CM & OS – Program Management, Fraud /Business Class Definitions/Public Authority Wage Rate



Operations

Class	Operation	Description	Exceptions
PublicAuthorityWage Rate	listPublicAuthorityWageRat es	Will query CountyWageRate table to retrieve public authority wage rates for a selected county.	AppException, InformationalException
PublicAuthorityWage Rate	createPublicAuthorityWage Rate	Will create record in CountyWageRate table.	AppException, InformationalException
PublicAuthorityWage Rate	readPublicAuthorityWageR ate	Will query CountyWageRate table to retrieve wage rate for a selected public authority.	AppException, InformationalException
PublicAuthorityWage Rate	modifyPublicAuthorityWag eRate	Will update the changes in CountyWageRate table	AppException, InformationalException

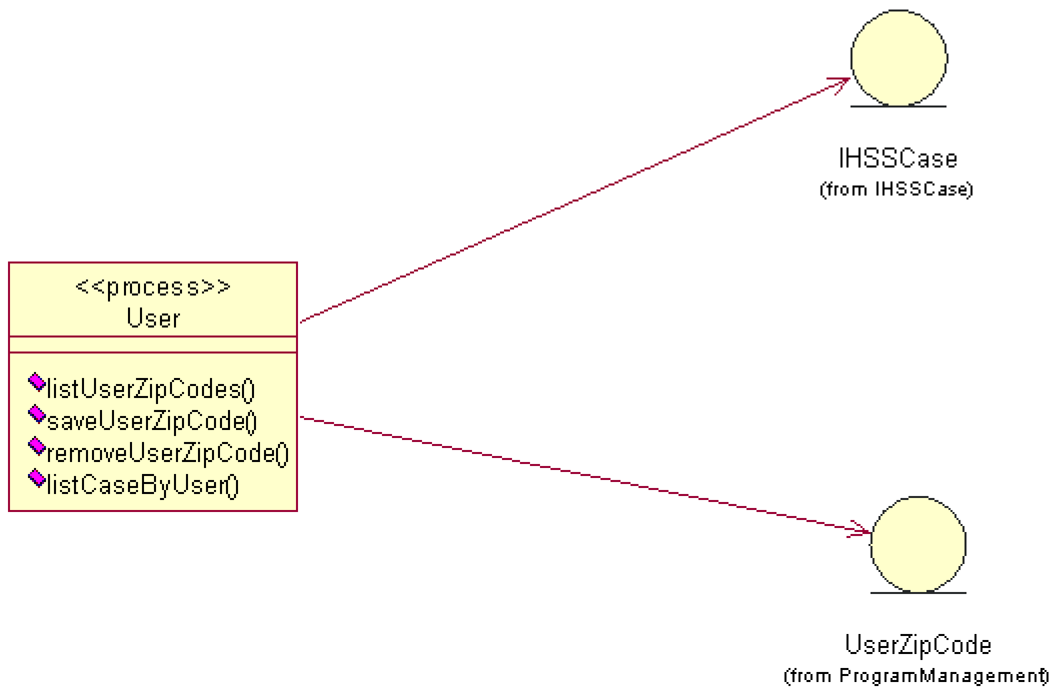
DSD 26/Recip CM & OS – Program Management, Fraud /Business Class Definitions/County Contractor Wage Rate



Operations

Class	Operation	Description	Exceptions
CountyContractorWage Rate	listContractContractorWageR ates	Will query CountyContractor table to retrieve county contractor rates for a selected county.	AppException, InformationalException
CountyContractorWage Rate	createCountyContractorWag eRate	Will create record in CountyContractor table.	AppException, InformationalException
CountyContractorWage Rate	readCountyContractorWage Rate	Will query CountyContractor table to retrieve rate for a selected contractor.	AppException, InformationalException
CountyContractorWage Rate	modifyCountyContractorWag eRate	Will update the changes in CountyContractor table.	AppException, InformationalException

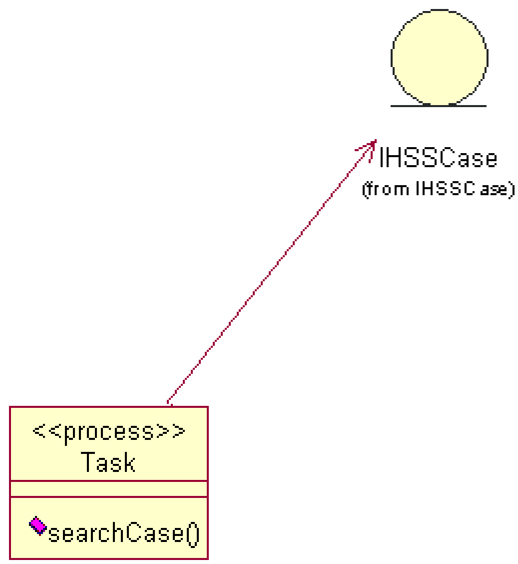
DSD 26/Recip CM & OS – Program Management, Fraud /Business Class Definitions/User



Operations

Class	Operation	Description	Exceptions
User	listUserZipCodes	Will query UserZipCode table to retrieve list of ZIP code associated with user.	AppException, InformationalException
User	saveUserZipCode	Will create record in UserZipCode table for selected user.	AppException, InformationalException
User	removeUserZipCode	Will delete the record in UserZipCode table for selected user.	AppException, InformationalException
User	listCaseByUser	Will query IHSSCase table to retrieve list of cases managed by this user.	AppException, InformationalException

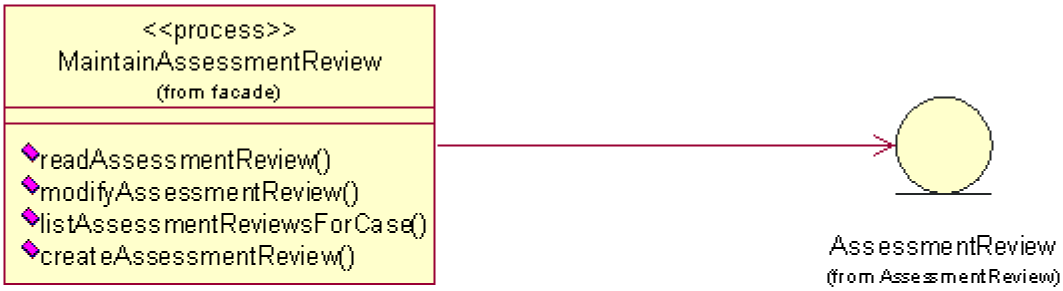
DSD 26/Recip CM & OS – Program Management, Fraud /Business Class Definitions/Task



Operations

Class	Operation	Description	Exceptions
Task	searchCase	This method will search for a list of cases based on Recipient's last name or Recipient's first name or the case reference number or any combination of these search criteria. It will call the method readmulti() of the class IHSSClass. This method is used in the screen "Case Search".	AppException, InformationalException

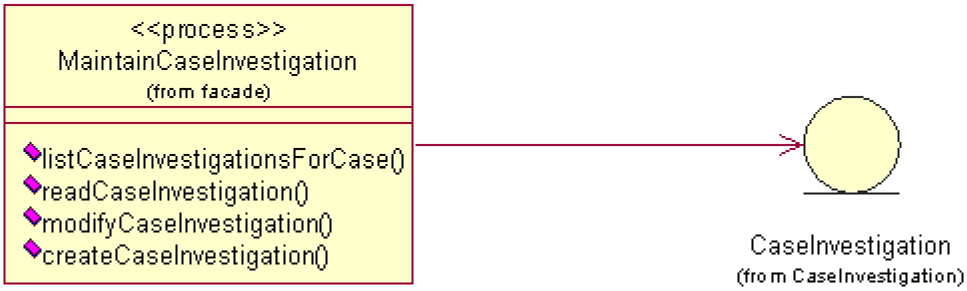
DSD 26/Recip CM & OS – Program Management, Fraud /Business Class Definitions/Assessment Review



Operations

Class	Operation	Description	Exceptions
MaintainAssessmentReview	readAssessmentReview	This method retrieves a QA Assessment record.	AppException, InformationalException
MaintainAssessmentReview	modifyAssessmentReview	This method updates the modified Assessment record.	AppException, InformationalException
MaintainAssessmentReview	listAssessmentReviewsForCase	This method retrieves all QA Assessment records for a case.	AppException, InformationalException
MaintainAssessmentReview	createAssessmentReview	This method inserts an Assessment record.	AppException, InformationalException

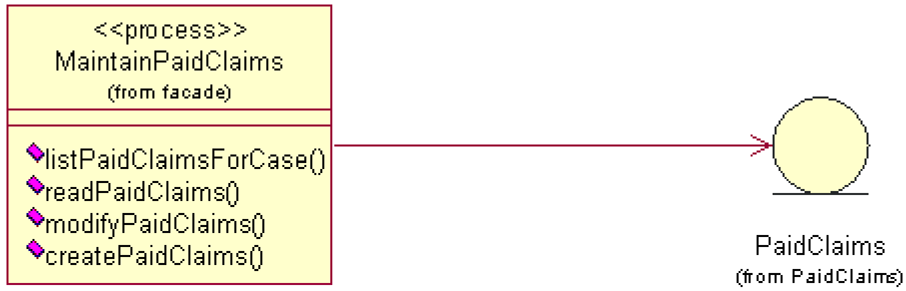
DSD 26/Recip CM & OS – Program Management, Fraud /Business Class Definitions/Case Investigation



Operations

Class	Operation	Description	Exceptions
MaintainCaseInvestigation	listCaseInvestigationsForCase	This method retrieves all Case Investigation records for a case.	AppException, InformationalException
MaintainCaseInvestigation	readCaseInvestigation	This method retrieves a Case Investigation record.	AppException, InformationalException
MaintainCaseInvestigation	modifyCaseInvestigation	This method updates a Case Investigation record.	AppException, InformationalException
MaintainCaseInvestigation	createCaseInvigation	This method adds a Case Investigation record.	AppException, InformationalException

DSD 26/Recip CM & OS – Program Management, Fraud /Business Class Definitions/Paid Claims



Operations

Class	Operation	Description	Exceptions
MaintainPaidClaims	listPaidClaimsForCase	This method retrieves all Paid Claim records for a case.	AppException, InformationalException
MaintainPaidClaims	readPaidClaims	This method retrieves a Paid Claim record.	AppException, InformationalException
MaintainPaidClaims	modifyPaidClaims	This method updates the Paid Claim record.	AppException, InformationalException
MaintainPaidClaims	createPaidClaims	This method creates a Paid Claim record.	AppException, InformationalException