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DSD - Section 20



CMIPS

D-4.2-03 – IHSS CMIPS Detailed System Design (DSD) (R2025.03.01) Section 20

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 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Print Person Notes Form Pop-Up
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Person Home – Provider
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Person
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Referral
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Application
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Case
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/User Search
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Statewide Client Index - CIN Search
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Medi-Cal Eligibility Information
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/CIN data does not match Applicant data Screen
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Case without CIN
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Home
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Cases
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Phone Numbers
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Phone Number
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Phone Number
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Phone Number
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Addresses
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Street Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain PO Box Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Rural Route Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain General Delivery Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Highway Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Other Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Addresses
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Email Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Email Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Inactivate Email Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Alternative IDs
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Alternative ID
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Alternative ID
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Alternative ID
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Alternative ID History
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Alternative ID History
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Notes (Person)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Note (Person)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Note
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Note
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Inactivate Note
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Merge Duplicate SSN
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/My Cases
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Content Tab Warning
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Content Tab Failure
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Owner User Home Screen
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/State Hearing Search
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Management Header - Case Perspective
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Management Header - Person Perspective - Provider
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Management Header - Person Perspective - Referral, Applicant or Recipient
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Message Center
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Message Pop-Up
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Message
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Address Send Verification Code

- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Address Enter Verification Code
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Address No Phone Numbers
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Phone Number Email Not Available
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Phone Number Send Verification Code
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Case Home Navigation
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Person Navigation
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Navigation Elements – My Workspace
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Navigation Elements County System Administrator Workspace
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (1-20)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (21-40)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (41-60)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (61-80)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (81-100)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (101-120)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (121-140)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (141-160)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (161-180)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (181-200)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (201-220)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (221-240)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (241-260)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (261-280)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (281-300)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (1-10)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (11-20)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (21-30)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (31-40)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (41-50)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (51-60)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (61-70)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Tasks and Notifications
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Create Recipient in Payroll (PROO901A)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Person Request (PROO922A)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Person SSN (PROO923A)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Person Address (PROO924A)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Recipient Worker Number (PR00925A)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/External Interfaces
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/External Interfaces/SCI Real Time – CMOO106A
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/External Interfaces/IHSS ESP CM Written Language AMQP Update Msg (IWOM885C)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Batch Processing
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Reporting
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Forms
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Person Type
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Gender
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Payroll Gender
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/County
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/State Hearing Status
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Person Title
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Suffix (Name)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Payroll Suffix
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Meets Residency Requirements
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Referral Source
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Ethnicity
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Spoken Language
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Written Language
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Address Type
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Residence Address Type
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Mailing Address Type
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Pre (Street)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Street Suffix
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Post (Street)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Unit Type
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/State
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Type (Phone)

- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Type (Alternate ID)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Sensitivity
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Priority
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Death Notification Source
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/MEDS Transaction Type
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Blank SSN Reason
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Duplicates (Alternative ID SSN Type)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Gender Identity
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Sexual Orientation
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/MEDS Citizen Document Type
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Message Center Subject
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Message Center Provider Forms
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Message Center Recipient Forms
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/User Page Access Log
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Snapshot
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Person
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Person Snapshot
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/User Zip Code
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Users
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Person Referral
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Alternate ID
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Email Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Email Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Contact Phone Number
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Address
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Phone Number
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Address Trigger Data
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions/IHSSCase
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions/PersonReferral
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions/ConcernRole, ConcernRoleSnapshot, Person, PersonSnapshot (Extensions)
 - DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions/MediCalEligInfo

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application

The IHSS CMIPS DSD Recip CM & OS – Online Search, Initial Contact and Intake Application topic area will discuss the CMIPS functionality associated with searching for a person or case, adding a referral, adding an applicant and creating an IHSS case.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Online Search, Initial Contact, Intake Application Topic Area

The CMIPS Online Search, Initial Contact and Intake Application topic area will define, in detail, the system function associated with these activities.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Functions

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Functions/Person, Case and State Hearing Search

CI	Document Name
 CI-67739 - DSD BF Person Case and State Hearing Search IMPLEMENTED	DSD_BF_Person_Case_and_State_Hearing_Search.doc

The CMIPS Person Search screens allow a user to determine if a person exists in the CMIPS. An individual person may exist only once in CMIPS but may be associated with different roles. For instance, if a person is both an IHSS Recipient and a Provider, that individual will have a single "Person Record" in the system.

Searching for a person may be done independently by last name, Social Security Number (SSN), Client Index Number (CIN), address (Street Address (Street Number, Street Name, Unit Type, and Unit Number), City), phone number, or email address. Additional search criteria may also be indicated.

CMIPS allows users to search based upon Soundex or by a name that sounds the same, but is spelled differently. For example, if the last name Smith were keyed and the Soundex Search indicated, the search results would include those individuals with the last name of Smith, Smythe, Smyth or some other phonetic variance of the name.

CMIPS allows users to access cases using the unique CMIPS case number. Unlike legacy CMIPS, an applicant/Recipient in CMIPS will have a single case number. If a Recipient moves from one county to another, the case moves with the Recipient and the county ownership changes with the same case number.

Additionally, CMIPS will allow users to search for State Hearings based upon State Hearing status associated to a case in the user's county. When executed, the State Hearing results display the Case ID (Number), Recipient name and State Hearing status. From the displayed results, the user may access the Case Home screen or the State Hearing screen associated with the case.

Displayed search results may be based upon a user's role and their accessibility. While it is possible to limit a user's access to cases in this way, it is recommended that all users needing to determine if a "person" exists be granted statewide search capabilities. User limitations could then be applied to prevent a user from "updating" cases in other counties or district offices.

When the Case Search function is used, and a matching case exists, the Case Home screen is displayed.

When the Person Search function is used, person records matching the search criteria will display the following data elements:

- Last Name, First Name, MI
- SSN
- Type – The Alternative ID SSN Type
- CIN - Will display only for a person type of Applicant or Recipient
- Date of Birth
- Gender
- Person Type (Recipient or Provider)
- Address (Street Number, Street Name, Unit Type, Unit Number)
- City
- County

From these displayed results, users may select a record, thereby accessing the Person Home screen which provides more detailed information specific to the person selected.

When the State Hearing Search function is used, cases matching the indicated State Hearing Status will display the following data elements:

- Case Number
- Recipient Name
- State Hearing Status

From the display results, the user may select:

- Case Number which will display the Case Home screen
- State Hearing Status which will display the associated State Hearing screen of the Recipient case

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Functions/Initial Contact and Intake Application

CI	Document Name
 CI-116193 - DSD BF Initial Contact and Intake Application IMPLEMENTED	DSD_BF_Initial_Contact_and_Intake_Application.doc

The Initial Contact and Intake Application functions of CMIPS follow the Person, Case and State Hearing Search functions.

If a person is not found when the Person Search is initiated, then depending upon the individual contacting the county, a user may create a referral or create an application (case). The Create Referral process is used when the caller is not the individual being referred. If the caller is the Applicant, then the Create Applicant process would be utilized. The outcome of either of these processes is the creation of a single Person Record in the CMIPS Application. All persons are registered and are identified with one of the following Person Type indications: Open-Referral, Closed-Referral, Applicant, Recipient or Provider. An individual may be a Person Type of Provider and any one of the other Person Types.

When a Person Record is created, addresses are verified using the address validation and standardization service. Both residence and mailing addresses will be subject to validation and standardization.

CMIPS allows and tracks changes related to a person record. Changes associated with addresses, phone numbers, names, etc., are date bound. When a change is applied, a history record is created and is viewable by users.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Functions/Create Referral_Recipient

CI	Document Name
 CI-67741 - DSD BF Create Referral Recipient IMPLEMENTED	DSD_BF_Create_Referral_Recipient.doc

If a person does not exist and the caller is someone other than the individual being referred for IHSS, the Create Referral pop-up allows the entry of minimal referral data of the person being referred. This data includes the first and last names, the referral source and either, the person's address or telephone number. When the record is saved, the Person Type is indicated as an Open-Referral.

Once created, the County staff will contact the referred individual to inquire if he/she is interested in applying for IHSS. If so, the Person Record is accessed through the Create Applicant process and the following data from the applicant is required to complete the Create Applicant process:

- Name (Last, First MI)
- SSN or applied-for SSN
- Date of Birth
- Spoken Language
- Written Language
- Gender
- Ethnicity
- County
- Residence Address
- Mailing Address
- Primary Phone Number

The Create Referral process allows the entry of only a Primary Phone Number; users will have the ability to update the Person Home screen with any additional contact phone numbers.

An Open-Referral record may also be closed and the Person Type will be changed to "Closed-Referral". A "Closed-Referral" may be later re-opened.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Functions/Create Case

CI	Document Name
 CI-67738 - DSD BF Create Case IMPLEMENTED	DSD_BF_Create_Case.doc

The Create Case process, an extension of the Create Applicant process, allows the user to search the Statewide Client Index (SCI) for a CIN associated with the applicant. Refer to Statewide Client Index – CIN Search for details. If SCI does not return any results, CMIPS will display "CIN does not exist for the applicant." The IHSS Referral for Medi-Cal Eligibility will be sent to the County Statewide Automated Welfare System (SAWS) to begin the Medi-Cal eligibility determination process. The County SAWS will return to CMIPS the CIN associated with the Medi-Cal application. Refer to the business flow No Active Medi-Cal for more information about this process. The CIN will be used as one of the data elements by which cases in SAWS, MEDS and CMIPS are identified.

For cases where a CIN does exist in SCI, the user may select the CIN which will be assigned to the Recipient case and, in a system-generated, subsequent transaction to SCI, retrieves some of the Medi-Cal Eligibility Determination System (MEDS) data needed to continue the processing of the IHSS case application. Refer to the business flow SCI/MEDS Interfaces for more information about this process.

When a case has been created, it is also assigned to a case owner. Depending upon the county processes, this case owner assignment may be to an actual case owner or a case owner supervisor. When the case owner assignment occurs, CMIPS produces a task to that case owner of the case assignment.

When a case is created, the Person Type is "Applicant" and the Case Status will be "Pending" until services are either granted or denied. When services are granted the Person Type again changes to "Recipient".

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Functions/Person Notes

CI	Document Name
 CI-67735 - DSD BF Person Notes IMPLEMENTED	DSD_BF_Person_Notes.doc

CMIPS allows notes entry associated with a Person Record. Note entries are listed in chronological order with last entry on top. A notes entry can be viewed or edited. Editing an existing note means appending notes to the already existing notes. Notes are considered active or cancelled. Once the note is cancelled, the status of the note will be changed to Cancelled. Both active and cancelled notes are viewable.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Flow

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Flow/Maintain Address

CI	Document Name
CI-116213 - DSD BP Maintain Address IMPLEMENTED	DSD_BP_Maintain_Address.doc

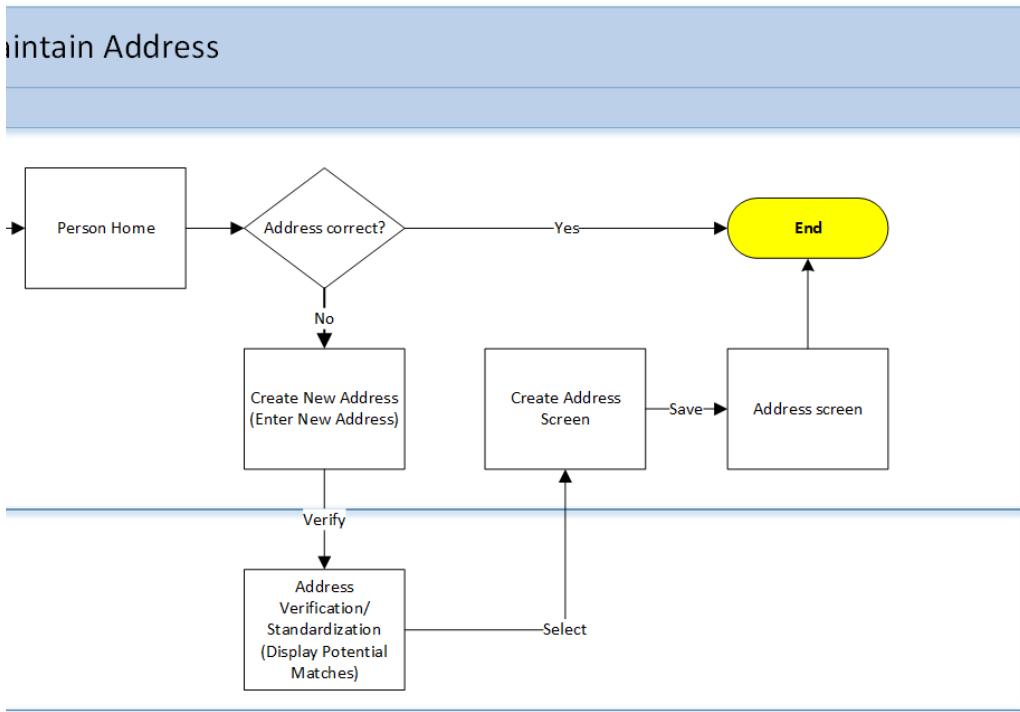


Figure – Maintain Address

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Flow/SCI/MEDS Interfaces

CI	Document Name
CI-116222 - DSD BP SCI MEDS Interface IMPLEMENTED	DSD_BP_SCI_MEDS_Interface.doc

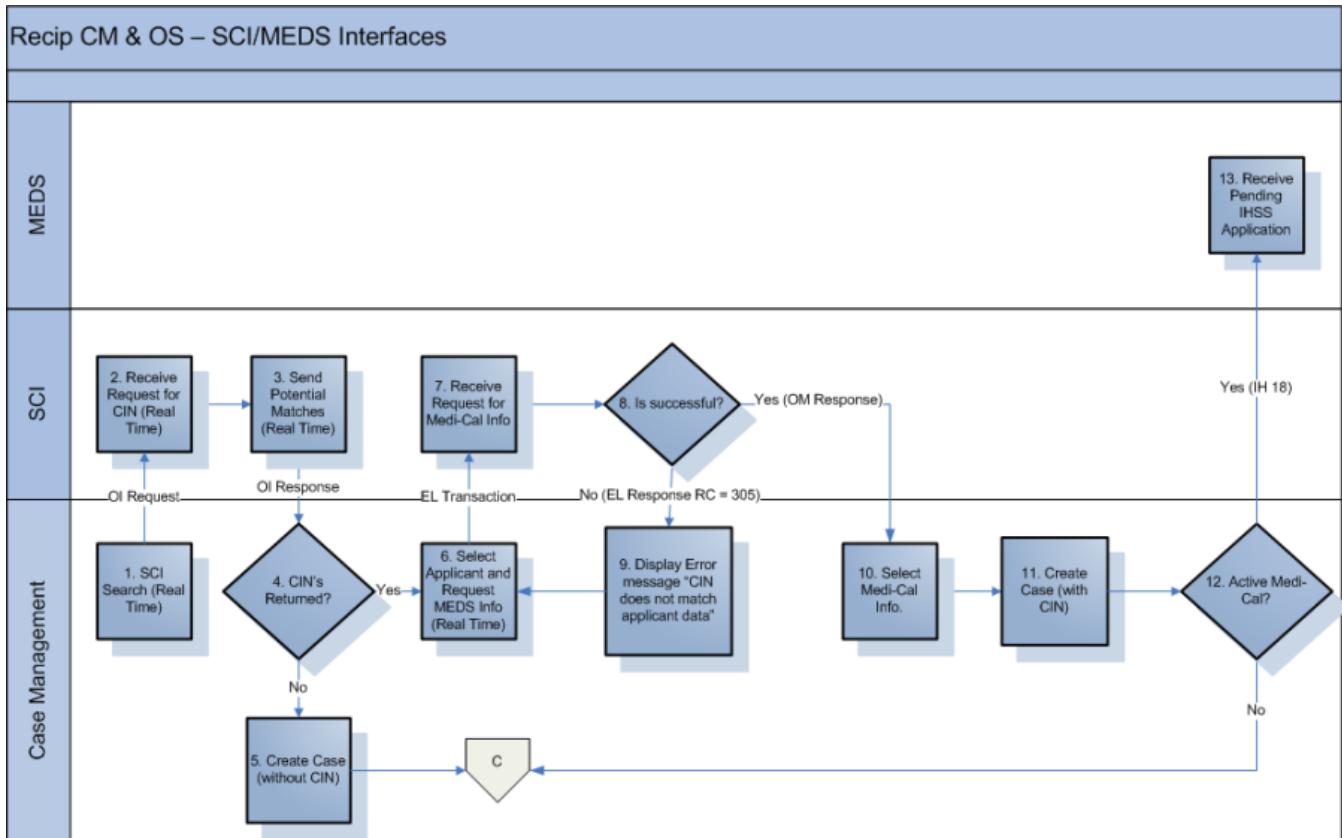


Figure - SCI/MEDS Interface

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Flow/No Active Medi-Cal

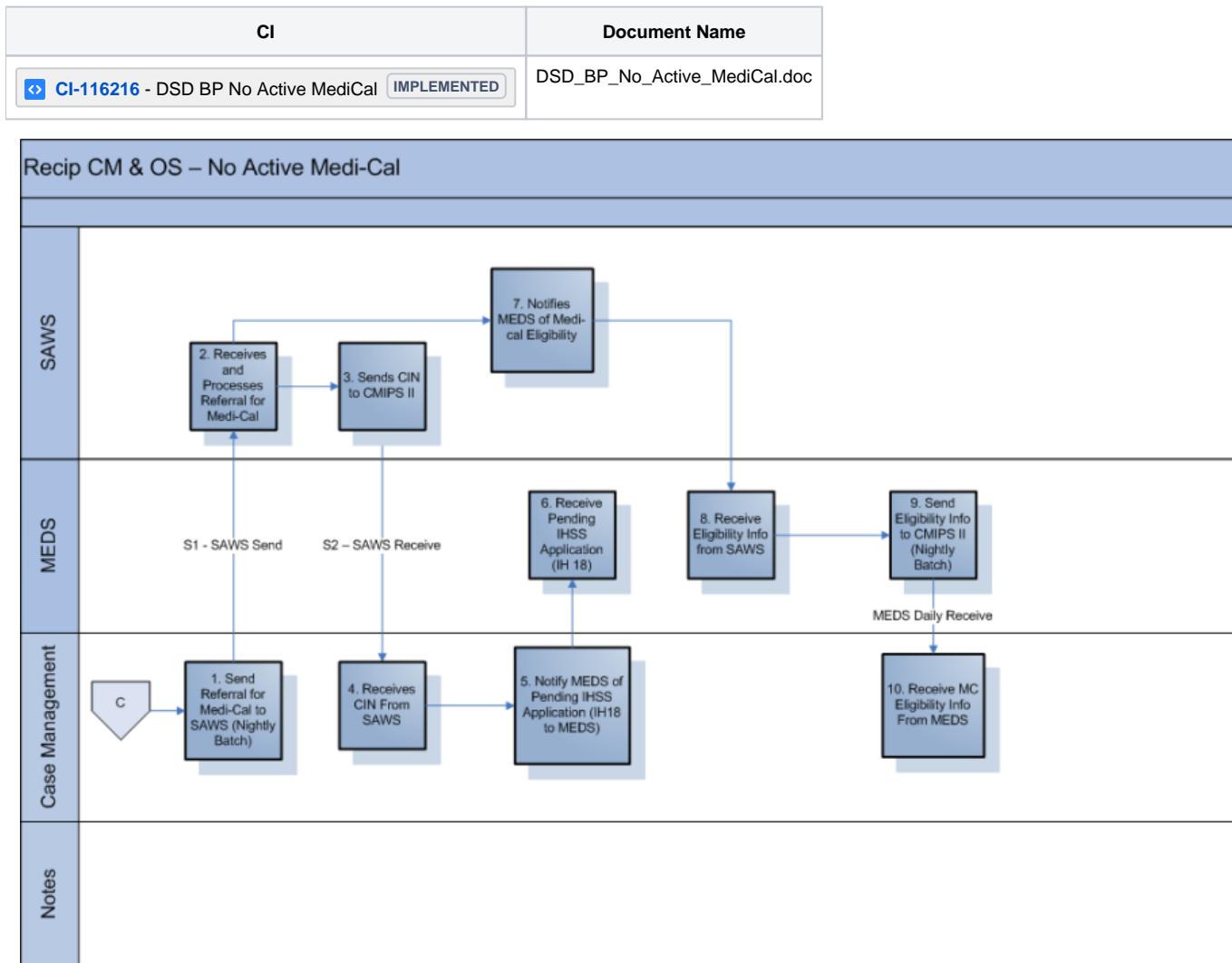


Figure - No Active Medi-Cal

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Flow/CIN Clearance

CI	Document Name
CI-444381 - DSD BP CIN Clearance IMPLEMENTED	DSD_BP_CIN_Clearance.doc

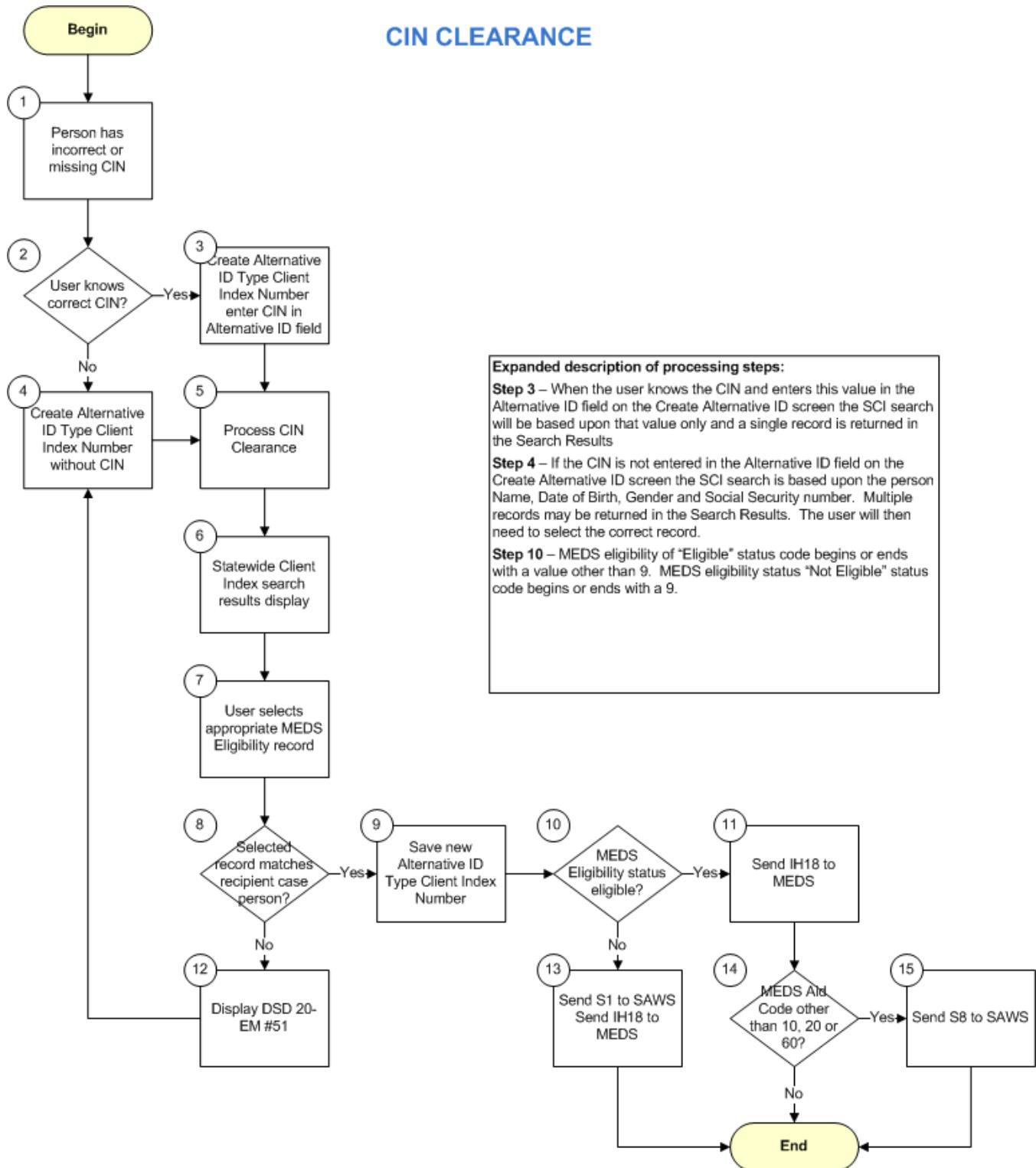


Figure - CIN Clearance Process Flow

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Flow/SCI Updates Daily Receive

CI	Document Name
CI-116223 - DSD BP SCI Updates Daily Receive IMPLEMENTED	DSD_BP_SCI_Updates_Daily_Receive.doc

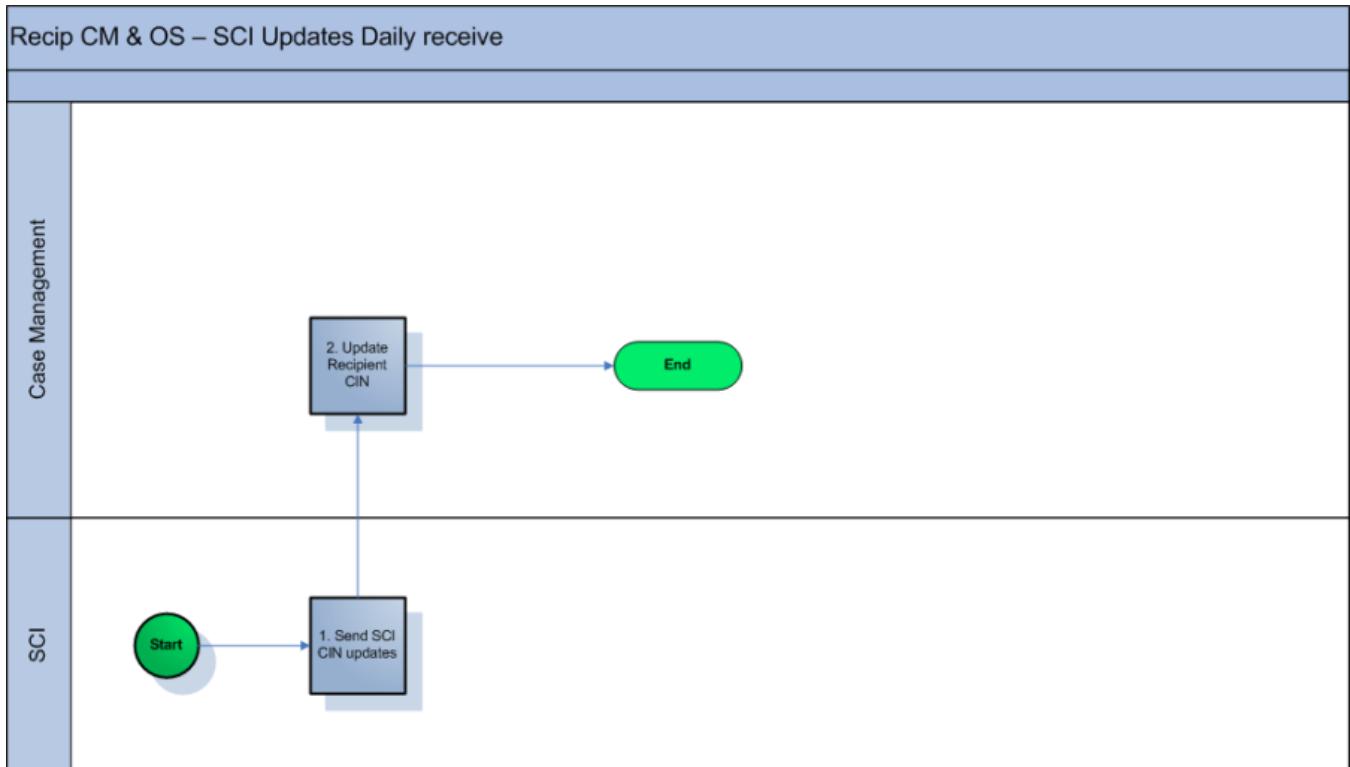


Figure - SCI Updates Daily Receive

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Process Flow /Initiation_Triggers, Pre-Conditions and Post Conditions

Summary view of business processes:

Table – Initiations/Triggers, Pre-Condition and Post Conditions

ID	Business Function	Initiation /Triggers	Pre-Conditions	Post Conditions
01	Person Search	From My Workspace, select one of the following: New Referral New Applicant Find a Person Register a Provider	The following pre-conditions apply: Person Record exists	If search criteria are met, the result will be a list of person records matching the search criteria. If no criteria are met, no results are displayed and the message "No Match Found" is displayed. If all independent search fields are blank when the search is executed, the following message will display: Please enter one or more of these fields: <ul style="list-style-type: none">• SSN (When SSN is used any Person with an Alternative ID Type Social Security Number with a blank or Suspect SSN indication in the Duplicates field or an Alternative ID Type Conversion Duplicate will displays in the Search Results)• Full or partial last name• CIN• Complete address• Provider Number
02	Case Search	From My Workspace in the Case Number field, enter a CMIPS Case Number and select the search icon.	The following pre-conditions apply: Case exists	If the case number matches an existing CMIPS case, the Case Home screen displays. If the entered case number is invalid or does not exist, CMIPS will display the message "No case could be found matching your search criteria".
03	State Hearing Search	From My Workspace, select "Find a State Hearing Case".	The following pre-conditions apply: Case(s) with indicated State Hearing status in designated county must exist	Cases matching the criteria display in the Search Results cluster of the State Hearing Search screen. If no case(s) exist matching the search criteria, CMIPS will display the message, "No case could be found matching your search criteria".
04	Create Application /Referral	From My Workspace, select one of the following: New Referral New Applicant	The following pre-conditions apply: A Person Record does not already exist	When the Create Referral or Create Application process is completed, a Person record will be created. Until a "Case is created" the Person Type record will remain "Open-Referral".
05	Person Notes	From the Person Left Navigation, select the Notes link.	The following pre-conditions apply: A Person Record must exist	When a Person Note has been created, CMIPS will allow the ability to View, Edit Person Note Edit – When the edit process is invoked, the original note entry is not affected or allowed to be modified but an additional noted entry may be entered against the particular note entry. Or Inactivate Person Note Inactivate – This function does not actually delete the Note but will change the Note from "Active" to "Cancel" and the note will no longer be editable; however, it is viewable. This action cannot be reversed. a note associated to a Person Record.
06	Create Case	From the Create Application screen, select the Create Case link.	The following pre-conditions apply: Person Record exists Case does not exist	When the Create Case function is completed, an IHSS case record has been created and the Person Type will change from "Open-Referral" to "Applicant."
07	Case Notes	From the Cases Left Navigation select the Notes link.	The following pre-conditions apply: A case must exist	When a Case Note has been created, CMIPS will allow the ability to View, Edit or Inactivate a note associated to the Case Record.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/Person Search

CI	Document Name
CI-116219 - DSD SF Person Search IMPLEMENTED	DSD_SF_Person_Search.doc

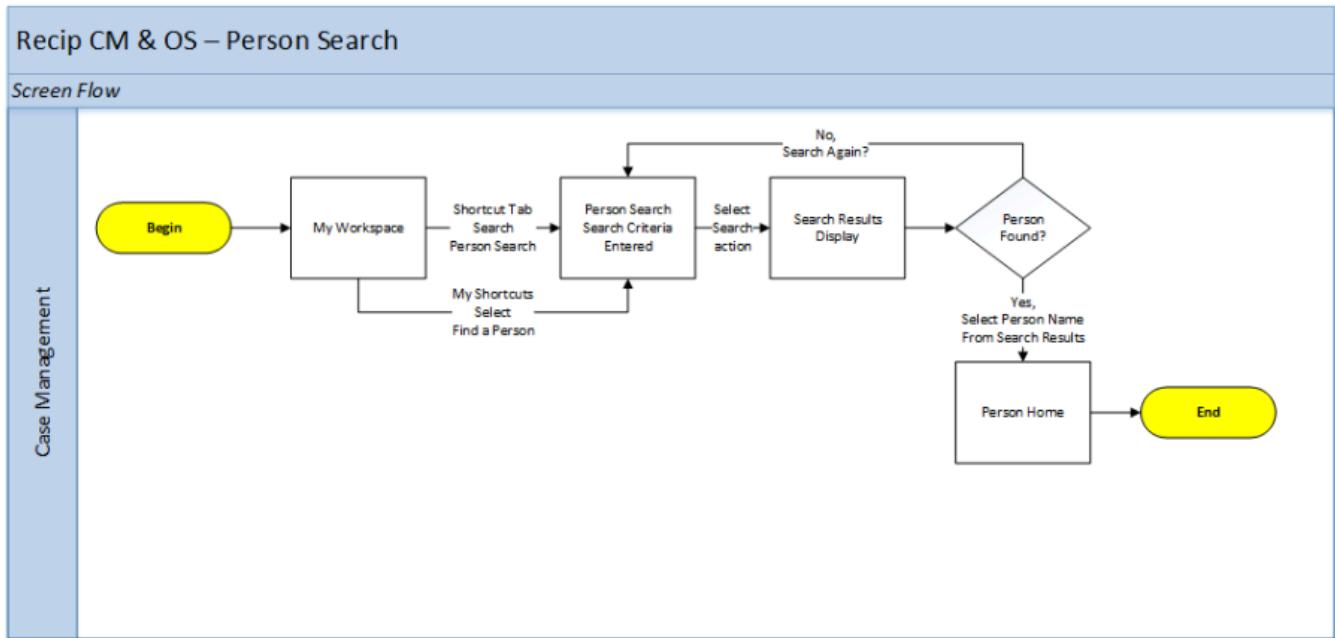


Figure - Person Search

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/Case Search

CI	Document Name
CI-116206 - DSD SF Case Search IMPLEMENTED	DSD_SF_Case_Search.doc

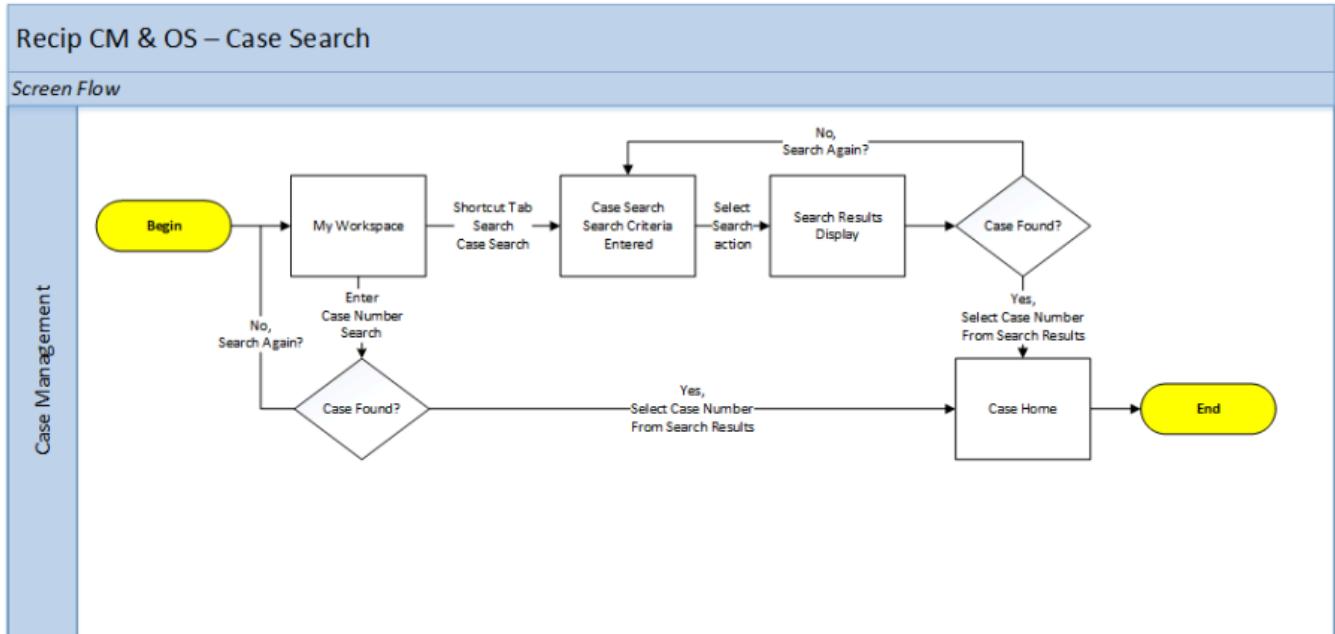


Figure – Case Search

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/State Hearing Search

CI	Document Name
CI-116226 - DSD SF State Hearing Search IMPLEMENTED	DSD_SF_State_Hearing_Search.doc

Recip CM & OS – State Hearing Search

Screen Flow

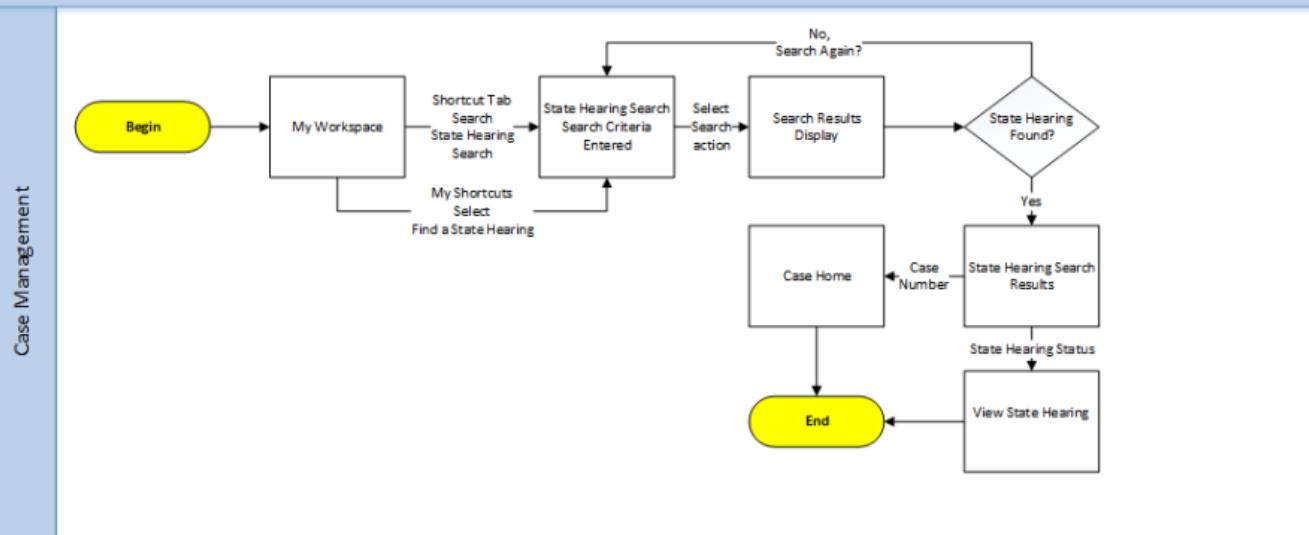


Figure – State Hearing Search

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/Create Referral

CI	Document Name
CI-69968 - DSD SF Create Referral IMPLEMENTED	DSD_SF_Create_Referral.doc

The diagram below outlines the Create Referral screen flow.

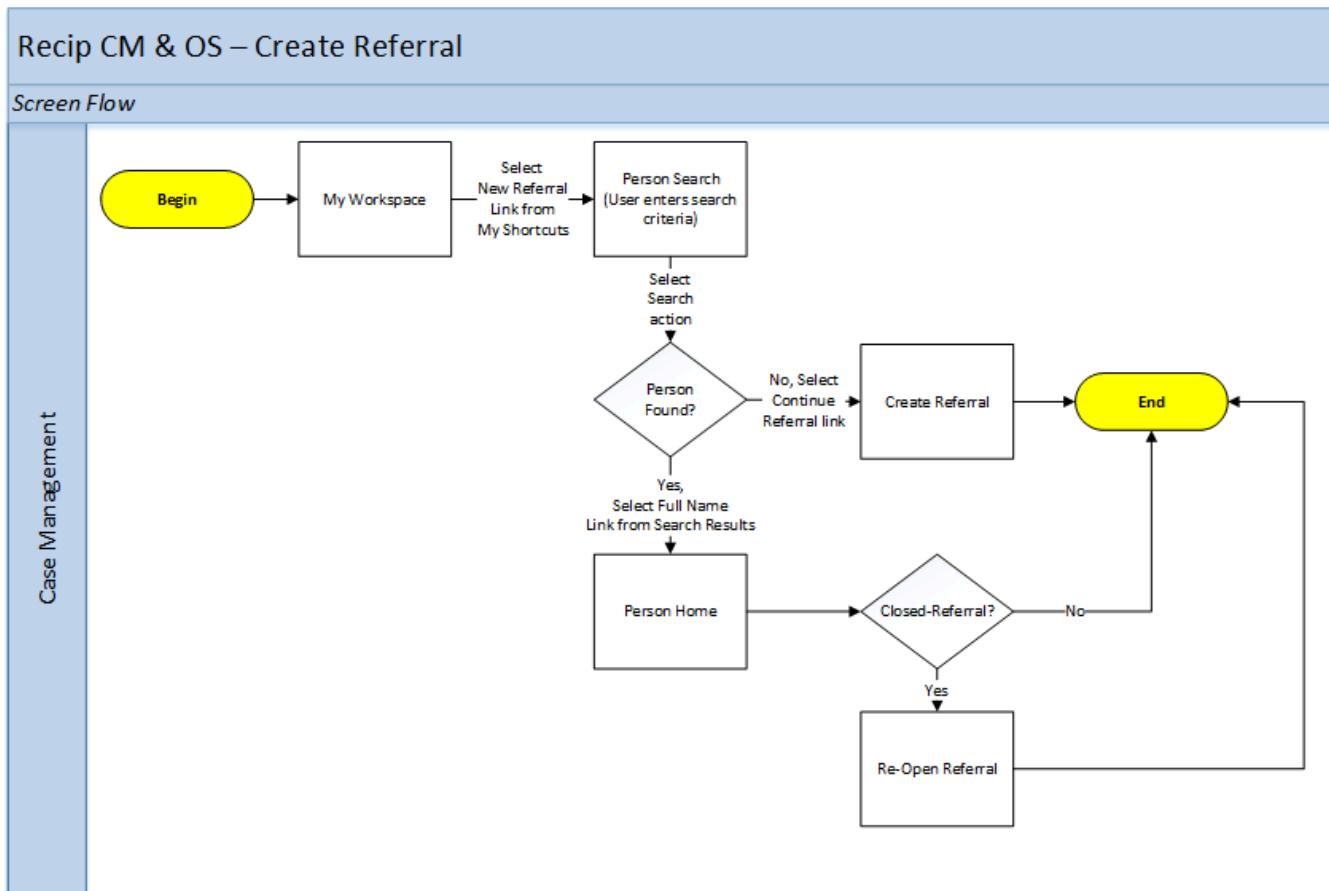


Figure – Create Referral

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/Address Verification

CI	Document Name
 CI-116197 - DSD SF Address Verification IMPLEMENTED	DSD_SF_Address_Verification.doc

Address Verification is a sub-process associated with any of the create person actions or the Create or Modify Address actions.

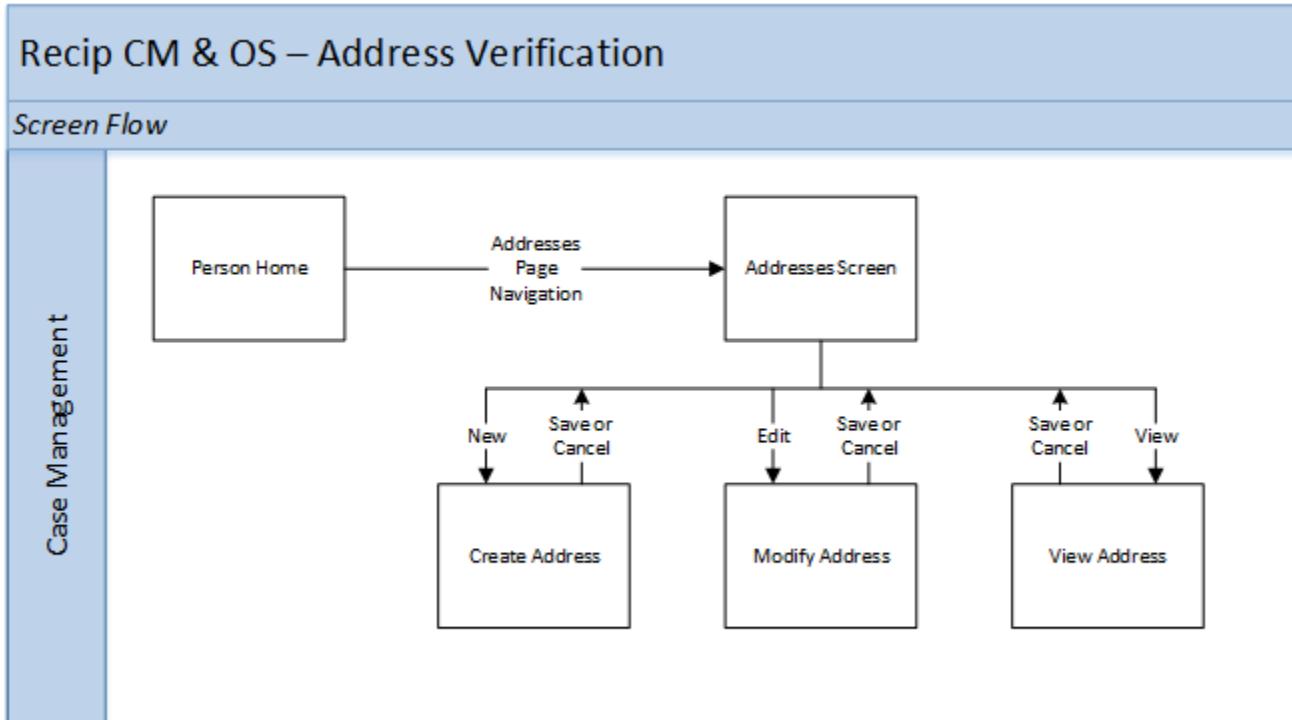


Figure - Address Verification

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/Create Case

CI	Document Name
 CI-69969 - DSD SF Create Case IMPLEMENTED	DSD_SF_Create_Case.doc

The diagram below outlines the Create Case process/screen flow.

Create Case

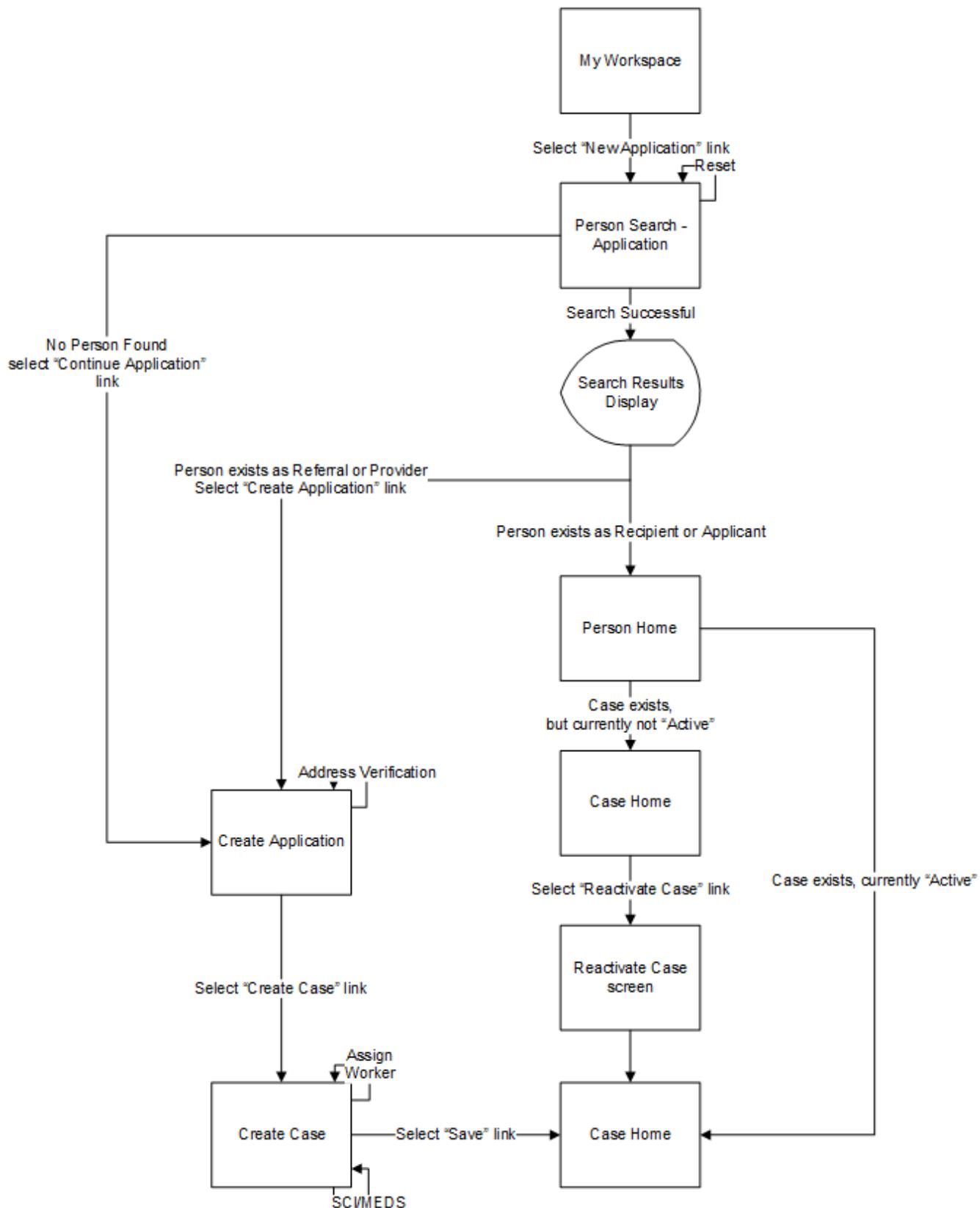


Figure – Create Case

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/Case Owner Assignment

CI	Document Name
CI-116204 - DSD SF Case Owner Assignment IMPLEMENTED	DSD_SF_Case_Owner_Assignment.doc

The assignment of a Case Owner is a sub-process which occurs during the Create Case or may be an action Change Owner from the Case Home screen.

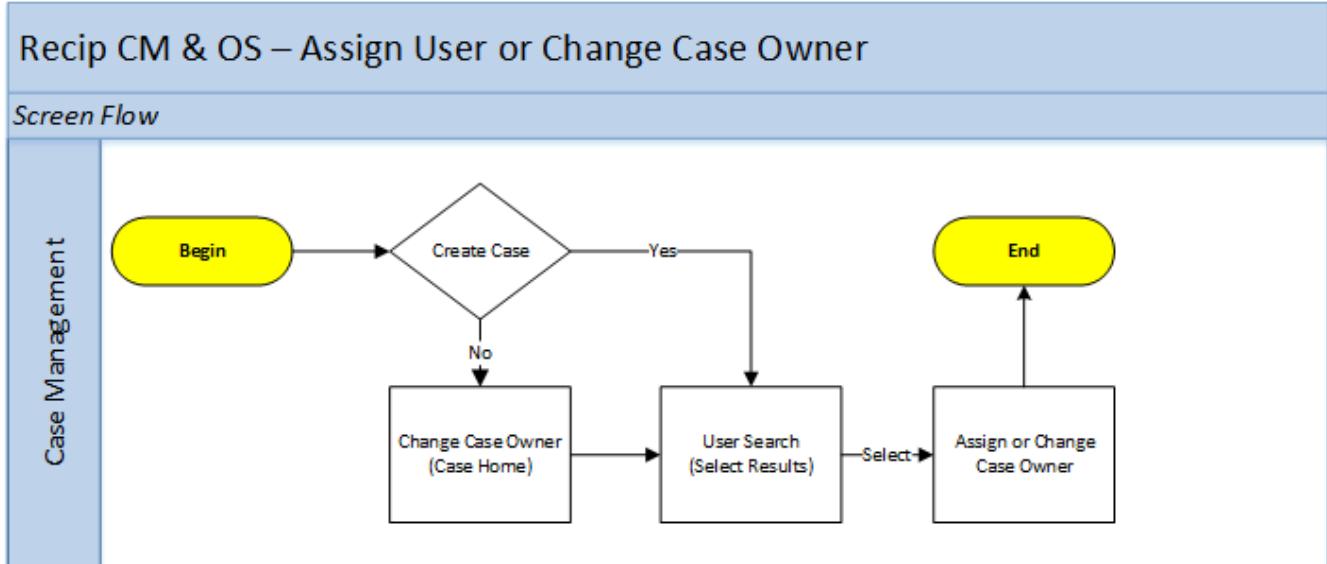
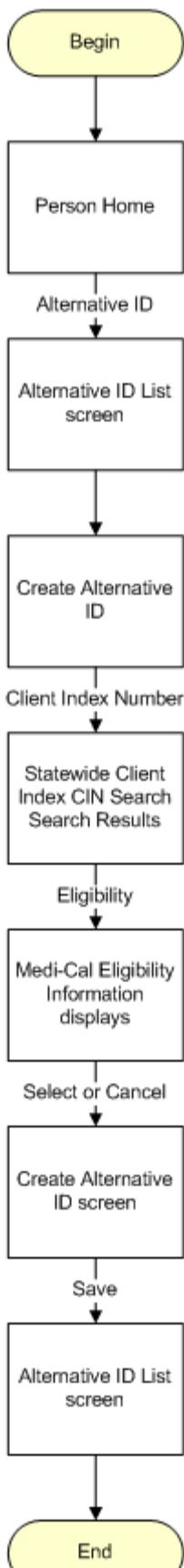


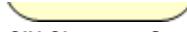
Figure – Case Owner Assignment

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Flows/CIN Clearance Screen Flow

CI	Document Name
 CI-444469 - DSD SF CIN Clearance IMPLEMENTED	DSD_SF_CIN_Clearance.doc

CIN Clearance Screen Flow




Figure - CIN Clearance Screen Flow

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/My Workspace

CI	Document Name
CI-67408 - DSD SC My Workspace IMPLEMENTED	DSD_SC_My_Workspace.doc

The My Workspace screen displays when a user has successfully logged on to the CMIPS Application.

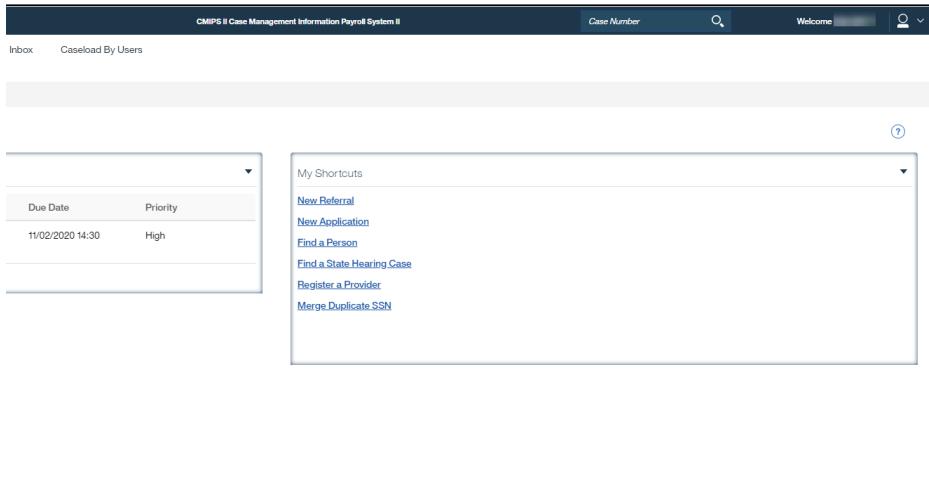


Figure – My Workspace

Navigation Tabs

My Workspace has the following navigational tabs in the upper left corner of the screen. These tabs always display

Workspace Tab	Function
SW - Home	Displays the SW - Home screen Note: This is only visible to Supervisors
SW - Team and Workloads	Displays the SW - My Users screen Note: This is only visible to Supervisors
My Workspace	Displays the My Workspace screen
My Cases	Displays the users My Cases screen
Inbox	Displays the users Inbox
Caseload By Users	Displays the Caseload by User screen. Only users with Case Supervisor security use this screen.

Actions/Functions

The following actions are associated with the My Workspace screen:

Action	Function
Case Number	Allows the entry of CMIPS Case Number (appears in the upper right hand corner of the screen)
My Shortcuts	
New Referral	Displays the Person Search – Create Referral pop-up
New Application	Displays the Person Search – Create Application pop-up
Find a Person	Displays the Person Search screen

Find a State Hearing Case	Displays the State Hearing Search screen
Register a Provider	Displays the Person Search – Create Provider screen
Merge Duplicate SSN	Displays the Merge Duplicate SSN screen This link is only enabled for HP Help Desk users with the appropriate Security Role.
Enter Warrant Replacements	Displays the Warrant Replacements list screen. This link is only enabled for HP Back Office users with the appropriate Security Role.
IRS Live-in Provider Self-Certification	Displays the IRS Live-in Provider Self-Certification Search screen. This link is only enabled for users with a Security Role that includes the HPELiveInSelfCertification Security Group (Contractor TPF)
Reissue Large Font Timesheet	Displays the Large Font Timesheet Reissuance screen. This link is only enabled for users with a Security Role that includes HPWarrantReplacementRole. (Contractor and CDSS)
Sick Leave Claim Manual Entry	Displays the Sick Leave Claim Manual Entry screen. This link is only enabled for users with the Security Role that includes TPFSickLeaveClaimEntry. (Contractor TPF)
<Task>	Displays the Task home screen

Data Elements

The following data elements are associated to the My Workspace screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
My Tasks					
Task	The ID associated with a task assigned to the user. Displays tasks due in the next seven (7) calendar days. Displayed tasks may be sorted by Task ID	Number	No	No	No
Subject	The subject pertaining to the task. Displayed tasks may be sorted by Subject.	String	No	No	No
Due Date	The Due Date associated with the task. Default display is, up to 25 tasks, due in the next seven (7) calendar days. Displayed tasks may be sorted by Due Date. (MM/DD/YYYY)	Date	No	No	No
Priority	The priority associated with the task. Displayed tasks may be sorted by Priority.	Number	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Person Search

CI	Document Name
CI-67759 - DSD SC Person Search IMPLEMENTED	DSD_SC_Person_Search.doc

When the Find a Person link is selected from the My Shortcuts section of the My Workspace screen or from the Person Search on the Search Shortcuts tab, the Person Search screen displays and allows the user to search for a person in CMIPS. Search results are displayed in alphabetical order by person name (last name, first name). The default Sort when searching by SSN will display only those records which do not have an Alternative ID Type of Duplicate SSN. If user wants to see all records, the "All SSNs" checkbox may be selected and the search results will display all Alternative ID SSN records regardless of the Type field indication.

Figure – Person Search

Actions/Functions

The following actions are associated with the Person Search screen:

Actions	Function
Person Search	
Search	Performs search on search criteria
Reset	Resets all fields to their default values
<<Previous	Displays the previous 50 person records matching the search criteria. This hyperlink is only displayed when there are previous records matching the search criteria.
Next>>	Displays the next group of person records (up to 50) matching the search criteria. This hyperlink is only displayed when there are additional records matching the search criteria.
Search Results – All Person Search screens	
Full Name	When selected, the Person Home screen displays

Data Elements – Person Search

The following data elements are associated with Search Criteria:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
General					
Last Name	Last name of the person	String	No (see search rules below)	No	Yes
SX	Soundex search of last name	Check Box	No	Unselected	Yes
First Name	First name of the person	String	No	No	Yes
SSN	Social security number of the person	Number	No (see search rules below)	No	Yes
All SSN	Displays Alternative ID SSN regardless of SSN Type indication.	Check Box	No	Unselected	Yes
CIN	Statewide Client Index Number	Number	No (see search rules below)	No	Yes
Person Type	Person Type	Drop-down list	No	Blank	Yes
Provider Number	Provider Number	String	No	Blank	Yes
Date of Birth	Date of birth of the person	Date (MM/DD/YYYY)	No	No	Yes
Gender	Gender of the person	Drop-down list	No	Blank	Yes
County	<ul style="list-style-type: none"> • Recipient: The county to which the Recipient case is currently assigned • Provider: The Provider's DOJ check county 	Drop-down list	No (see search rules below)	All	Yes
District Office	<ul style="list-style-type: none"> • District office assignment only occurs when a "case" is created. Therefore, when searching for a Person Type of "Referral" or "Provider" this fields should be left blank. • When searching for Person Type of Applicant or Recipient: The predefined list of district offices within a county displays. If a county is selected as one of the search criteria, the district office list will be populated. If no county is selected as a criterion, this Drop-down list is empty. 	Drop-down list	No	No	Yes
Address					
Street Number	The street number of the residence address of the person	Number	No (see search rules below)	No	Yes
Street Name	The street name of the residence address of the person	String	No (see search rules below)	No	Yes
Unit Type	Allows user to select a Unit Type	Drop-down	No	No	Yes
Unit Number	Allows user to enter a Unit Number	Number	Yes, but only when Unit Type is indicated	No	Yes
City	The residence city of the person	String	No (see search rules below)	No	Yes
Other Contact Information					
Phone Number	The phone number of the person	Number	No	No	Yes
Email Address	The email address of the person	String	No	No	Yes

Search Rules:

When performing a Person Search, one or more of the following fields is required:

- SSN
- Full or partial last name. For a partial name search, a minimum of three characters needs to be entered. If fewer than three characters are entered for the last name, the search will look for an exact match. For example, if the last name is entered as 'lin' in the search criteria, then the search result will return persons with last names such as 'lincoln,' 'linn,' 'ling' and 'lindall'. If the last name is entered as 'li' in the search criteria, then the search result will return only persons with the last name 'li.'
- CIN
- All Address Fields (Street Number, Street Name, City).
- Provider Number
- Phone Number
- Email Address

When performing a Person Search and multiple search criteria are entered, the following search hierarchy is used: SSN, CIN, Provider ID, Phone Number, and Email Address. (i.e. When search criteria includes SSN, all other criteria is ignored. If no SSN exists, search is performed on CIN, etc.)

Data Elements – Search Results

The following are the data elements associated with Person Search Results:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Full Name	Last Name, First Name	String	No	No	No
SSN	SSN of the person. This field will not display if the "Applied for SSN" has been indicated. The SSN will be masked showing only the last 4 digits, example: XXXX-XX-9999.	Number	No	No	No
Type	SSN Type – Possible results are: <ul style="list-style-type: none">• Blank• Duplicate SSN• Suspect SSN	String	No	Blank or Suspect SSN if All SSNs checkbox selected user will also see Duplicate SSN	No
CIN	CIN. This field will be blank if the person type is Provider or if no CIN existed when the case was created.	Number	No	No	No
Date of Birth	Date of birth of the person. This field may be blank for Person Type "Referral."	Date (MM /DD/YYYY)	No	No	No
Gender	Gender of the person	String	No	No	No
Person Type	Person Type	String	No	No	No
Status	Provider: Yes, No, Pending Reinstatement, Pending or Terminated Prior to Conversion Recipient/Provider: Blank Recipient: Eligible, Presumptive Eligible, Leave, Terminated, Denied Applicant: Pending, Application Withdrawn, Denied Open Referral: Blank	String	No	No	No
Residence Address	The residence address of the person	String	No	No	No
City	The residence city of the person	String	No	No	No
County	Applicant/Recipient: The county to which the Recipient case is currently assigned Provider: The county which completed the Provider's DOJ background check	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Person Search – Referral

CI	Document Name
CI-67770 - DSD SC Person Search Referral IMPLEMENTED	DSD_SC_Person_Search_Referral.doc

When the New Referral link is selected from the My Shortcuts section of the My Workspace screen the Person Search screen displays. This function allows the user to search for a person in CMIPS. A user can conduct a stand alone search by SSN, full or partial Last Name, CIN, Provider Number, Complete Address (with or without Unit Type and Unit Number), Phone Number, or Email Address. If the person does not exist, this screen allows the user to select the Continue Referral and create a person record. Search results are displayed in alphabetical order by person name (last name, first name).

Figure – Person Search – Referral

Actions/Functions

The following actions are associated with the Person – Continue Referral search screen:

Actions	Function
Person Search – Continue Referral	
Search	Performs search on search criteria
Reset	Resets all fields to their default values
Continue Referral	Displays the Create Referral screen
<<Previous	Displays the previous 50 person records matching the search criteria. This hyperlink is only displayed when there are previous records matching the search criteria.
Next>>	Displays the next group of person records (up to 50) matching the search criteria. This hyperlink is only displayed when there are additional records matching the search criteria.
Search Results – All Person Search screens	
Full Name	When selected, the Person Home screen displays

Data Elements – Person Search – Referral

For a detailed description of the Data Elements, see the [Person Search](#) screen design.

Data Elements – Search Results – Referral

For a detailed description of the Data Elements, see the [Person Search](#) screen design.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Person Search – Application

CI	Document Name
CI-67787 - DSD SC Person Search Application IMPLEMENTED	DSD_SC_Person_Search_Application.doc

When the New Application link is selected from the My Shortcuts section of the My Workspace screen the Person Search screen displays. This screen allows the user to search for a person in CMIPS. A user can conduct a stand alone search by SSN, full or partial Last Name, CIN, Provider Number, Complete Address (with or without Unit Type and Unit Number), Phone Number, or Email Address. If the person does not exist, this screen allows the user to select Continue Application link and create a person record and when completed an IHSS case. Search results are displayed in alphabetical order by person name (last name, first name).

Figure – Person Search – Application

Actions/Functions

The following actions are associated with the Person – Continue Application Search screen:

Action	Function
Person Search – Continue Applicant	
Search	Performs search on search criteria
Reset	Resets all fields to their default values
Continue Application	Displays the Create Applicant screen
<<Previous	Displays the previous 50 person records matching the search criteria. This hyperlink is only displayed when there are previous records matching the search criteria.
Next>>	Displays the next group of person records (up to 50) matching the search criteria. This hyperlink is only displayed when there are more than 50 records matching the search criteria.
Search Results – All Person Search screens	
Full Name	When selected, the Person Home screen displays

Data Elements – Person Search – Application

For a detailed description of the Data Elements, see the [Person Search](#) screen design.

Data Elements – Search Results – Application

For a detailed description of the Data Elements, see the [Person Search](#) screen design.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Person Home – Referral, Applicant or Recipient

CI	Document Name
CI-67786 - DSD SC Person Home Ref App Rec IMPLEMENTED	DSD_SC_Person_Home_Ref_App_Rec.docx

When the Full Name link is selected from the Person Search screen and the Person Type is Open Referral, Closed Referral, Application or Recipient; or when the Recipient Name is selected from Case Home screen the Person Home screen displays. This screen allows the user to view the Person Record details. See the following section for the details of the indicated Context Panel.

The screenshot shows the 'Person Home' screen for a person record. The context panel on the left includes tabs for Person Home, Phone Numbers, Addresses, Email Addresses, History, Alternative IDs, CDPH Death Match, and Notes. The main content area displays the following fields:

- Name:** First Name: [redacted], Last Name: [redacted]
- Title:** [redacted]
- Address:** Residence Address: [redacted], Mailing Address: [redacted]
- Contact Information:** Home Phone Number: [redacted], Cell Phone Number: [redacted], Primary Phone Number: Yes, Primary Phone Number: No
- Details:** Case Number: [redacted], Person Type: Recipient, Date of Birth: [redacted], Gender: Female, Spoken Language: English, Other Spoken Language Detail: [redacted], Reported Date of Death: [redacted], Death Notification Source: [redacted]
- Right-hand sidebar (Blank SSN Reason):**
 - County: San Bernardino
 - Referral Source: Mother
 - Medi-Cal Payer: No
 - Ethnicity: Black
 - Sexual Orientation: [redacted]
 - Written Language: English
 - Other Written Language Detail: [redacted]
 - Provider Number: [redacted]
 - Date of Death: [redacted]
 - Death Outcome: [redacted]

Figure – Person Home – Person Type – Referral, Applicant or Recipient

Context Panel – Person Home – Provider

For Context Panel information, please refer to [Case Management Header - Person Perspective - Referral, Applicant or Recipient](#).

Content Tabs & Page Navigation

For Content Tabs & Page Navigation, please refer to [Person Navigation](#).

Actions/Functions

The following actions are associated with the Person Home for all person types, unless otherwise indicated:

Action	Function
Edit	Displays the Modify Person pop-up
<Case Number>	Displays the Case Home screen for users assigned to the appropriate user security group.
Manage	

Create Referral	Allows the user, assigned to the appropriate user security group, to create Referral Person Type record from Provider Person Type record. Displays only when Person Type is Provider.
Create Application	Allows the user to create a new application. Displays when Person Type is Open Referral, Closed Referral or Provider
Close Referral	Allows the user, assigned to the appropriate user security group, to close an existing Open-Referral Person Type record. Displays when Person Type is Open Referral.
Re-Open Referral	Allows the user, assigned to the appropriate user security group, to re-open a Closed Referral Person Type record. Displays when Person Type is Closed Referral.
Create Provider	Allows the user, assigned to the appropriate user security group, to create a Provider Person Type record from a Referral, Applicant or Recipient Person Type record. Displays on all Person Types except Provider.

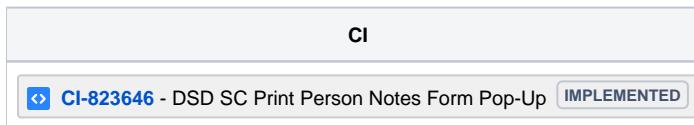
Data Elements

The following data elements are associated with Person Home for all person types:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name					
Title	Title of the person	String	No	No	No
Effective Date	Effective date of person name change	Date	No	No	No
First Name	First name of the person	String	No	No	No
Middle Name	Middle name of the person	String	No	No	No
Last Name	Last name of the person	String	No	No	No
Suffix	Suffix of the person	String	No	No	No
Contact Information					
Residence Address	Residence address of the person	String	No	No	No
Mailing Address	Mailing address of the person	String	No	No	No
IHSS Website User	Indicates if the individual has registered with the IHSS Website Yes = Individual has completed Registration with the IHSS Website No = Individual has not completed Registration with the IHSS Website	String	No	Blank	No
Home Phone Number	List the home phone number of the person	Number	No	No	No
Primary Phone Number	Identifies whether the Home Phone is the primary phone	String	No	No	No
Email Address	The email address of the person	String	No	No	No
Cell Phone Number	List the cell phone number of the person	Number	No	No	No
Primary Phone Number	Identifies whether the Cell Phone is the primary phone	String	No	No	No
Details					
Case Number	CMIPS Case number	Number	No	No	No
Blank SSN Reason	Reason the SSN field was left blank	String	No	No	No
Person Type	Person type	String	No	No	No
County	Recipient: The county to which the Recipient case belongs Provider: The county which completed the Provider's DOJ background check	String	No	No	No
Meets Residency Requirements	Meets residency requirements	String	No	No	No
Referral Source	Referral source	String	No	No	No
Date of Birth	Date of birth of the person	Date	No	No	No
Medi-Cal Pseudo	Indicates "No" or "Yes" depending upon where the user had or had not selected the Medi-Cal Pseud field.	String	No	No	No
Gender	Gender of the person	String	No	No	No

Ethnicity	Ethnicity of the person	String	No	No	No
Gender Identity	The gender identify of the person based on gender identify code table	String	No	No	No
Sexual Orientation	The sexual orientation of the person based on sexual orientation code table	String	No	No	No
Spoken Language	Spoken language of the Person	String	No	No	No
Written Language	Written language of the person	String	No	No	No
Other Spoken Language Detail	Other Spoken Language of the Person Note: Character maximum of 25	String	No	No	Yes
Other Written Language Detail	Other Written Language of the Person Note: Character maximum of 25	String	No	No	Yes
Reported Date of Death	System generated or user selected date death was reported	Date	No	No	No
Provider Number	The provider number if one exists.	Number	No	No	No
Death Notification Source	System-generated or user-selected source of death notification	String	No	No	No
Date of Death	Date of death	Date	No	No	No
Death Outcome	Allows user to indicate the Outcome of Death Verification	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Print Person Notes Form Pop-Up



When a user selects the Print Person Notes Form button on the Notes (Person) screen, the Print Person Notes Form Pop-Up will display.

Figure – Print Person Notes Form Pop-Up

Actions/Functions

The following actions are associated with the Print Person Notes Form Pop-Up:

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

Data Elements

The following data elements are associated with the Print Person Notes Form Pop-Up:

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

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Person Home – Provider

CI	Document Name
CI-740804 - DSD SC Person Home Provider IMPLEMENTED	DSD_SC_Person_Home_Provider.docx

When the Full Name link is selected from the Person Search screen and the Person Type is Provider the Person Home screen displays. This screen allows the user to view the Person Record details. See the following section for the details of the indicated Context Panel.

Figure – Person Home – Person Type – Provider

Context Panel – Person Home – Provider

For Context Panel information, please refer to [Case Management Header - Person Perspective - Provider](#).

Content Tabs & Page Navigation

For Content Tabs & Page Navigation, please refer to [Person Navigation](#).

Actions/Functions

The following actions are associated with the Person Home for all person types, unless otherwise indicated:

Action	Function
Edit	Displays the Modify Person pop-up
<Case Number>	Displays the Case Home screen for users assigned to the appropriate user security group.
Manage	

Create Referral	Allows the user, assigned to the appropriate user security group, to create Referral Person Type record from Provider Person Type record. Displays only when Person Type is Provider.
Create Application	Allows the user to create a new application. Displays when Person Type is Open Referral, Closed Referral or Provider
Close Referral	Allows the user, assigned to the appropriate user security group, to close an existing Open-Referral Person Type record. Displays when Person Type is Open Referral.
Re-Open Referral	Allows the user, assigned to the appropriate user security group, to re-open a Closed Referral Person Type record. Displays when Person Type is Closed Referral.
Create Provider	Allows the user, assigned to the appropriate user security group, to create a Provider Person Type record from a Referral, Applicant or Recipient Person Type record. Displays on all Person Types except Provider.

Data Elements

The following data elements are associated with Person Home for all person types:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name					
Title	Title of the person	String	No	No	No
Effective Date	Effective date of person name change	Date	No	No	No
First Name	First name of the person	String	No	No	No
Middle Name	Middle name of the person	String	No	No	No
Last Name	Last name of the person	String	No	No	No
Suffix	Suffix of the person	String	No	No	No
Contact Information					
Residence Address	Residence address of the person	String	No	No	No
Mailing Address	Mailing address of the person	String	No	No	No
IHSS Website User	Indicates if the individual has registered with the IHSS Website Yes = Individual has completed Registration with the IHSS Website No = Individual has not completed Registration with the IHSS Website	String	No	Blank	No
Home Phone Number	List the home phone number of the person	Number	No	No	No
Primary Phone Number	Identifies whether the Home Phone is the primary phone	String	No	No	No
Email Address	The email address of the person	String	No	No	No
Cell Phone Number	List the cell phone number of the person	Number	No	No	No
Primary Phone Number	Identifies whether the Cell Phone is the primary phone	String	No	No	No
Details					
Case Number	CMIPS Case number	Number	No	No	No
Blank SSN Reason	Reason the SSN field was left blank	String	No	No	No
Person Type	Person type	String	No	No	No
County	Recipient: The county to which the Recipient case belongs Provider: The county which completed the Provider's DOJ background check	String	No	No	No
Meets Residency Requirements	Meets residency requirements	String	No	No	No
Referral Source	Referral source	String	No	No	No
Date of Birth	Date of birth of the person	Date	No	No	No
Medi-Cal Pseudo	Indicates "No" or "Yes" depending upon where the user had or had not selected the Medi-Cal Pseud field.	String	No	No	No
Gender	Gender of the person	String	No	No	No

Ethnicity	Ethnicity of the person	String	No	No	No
Spoken Language	Spoken language of the Person	String	No	No	No
Written Language	Written language of the person	String	No	No	No
Other Spoken Language Detail	Other Spoken Language of the Person Note: Character maximum of 25	String	No	No	Yes
Other Written Language Detail	Other Written Language of the Person Note: Character maximum of 25	String	No	No	Yes
Reported Date of Death	System generated or user selected date death was reported	Date	No	No	No
Provider Number	The provider number	Number	No	No	No
Death Notification Source	System-generated or user-selected source of death notification	String	No	No	No
Date of Death	Date of death	Date	No	No	No
Death Outcome	Allows user to indicate the Outcome of Death Verification	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Person

CI	Document Name
CI-67775 - DSD SC Modify Person IMPLEMENTED	DSD_SC_Modify_Person.doc

When the Edit action is selected from the Person Home screen the Modify Person pop-up displays.

The screenshot shows a 'Modify Person' pop-up window with the following fields:

- Personal Information:**
 - Title: [dropdown]
 - Name Change Effective Date: 07/11/2023 [date picker]
 - First Name: [text input]
 - Middle Name: [text input]
 - Last Name: [text input]
 - Suffix: [dropdown]
- Identifiers:**
 - Case Number: [text input]
 - Blank SSN Reason: [checkbox]
 - Taxpayer ID: [text input]
 - Medi-Cal Pseudo: [checkbox]
- Demographic Details:**
 - Person Type: Recipient
 - County: San Diego
 - Residency Requirements: Mel
 - Referral Source: Other
 - Date of Birth: 01/02/1952 [date picker]
 - Gender: Female
 - Gender Identity: [dropdown]
 - Sexual Orientation: Unknown
 - Spoken Language: Spanish
 - Written Language: English
 - Other Spoken Language Detail: [text input]
 - Other Written Language Detail: [text input]
 - Ethnicity: No Valid data Reported
 - Date of Death: [date picker]
 - Reported Date Of Death: [text input]
 - Death Outcome: [dropdown]
 - Death Notification Source: [dropdown]
- Buttons:**
 - Save
 - Cancel

Figure - Modify Person Pop-Up

Actions/Functions

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

Action	Function
Save	Saves the modified screen and displays the Person Home screen
Cancel	Cancels the action returning the user to the Person Home screen

Case Number	Displays the Case Home page
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Data Elements

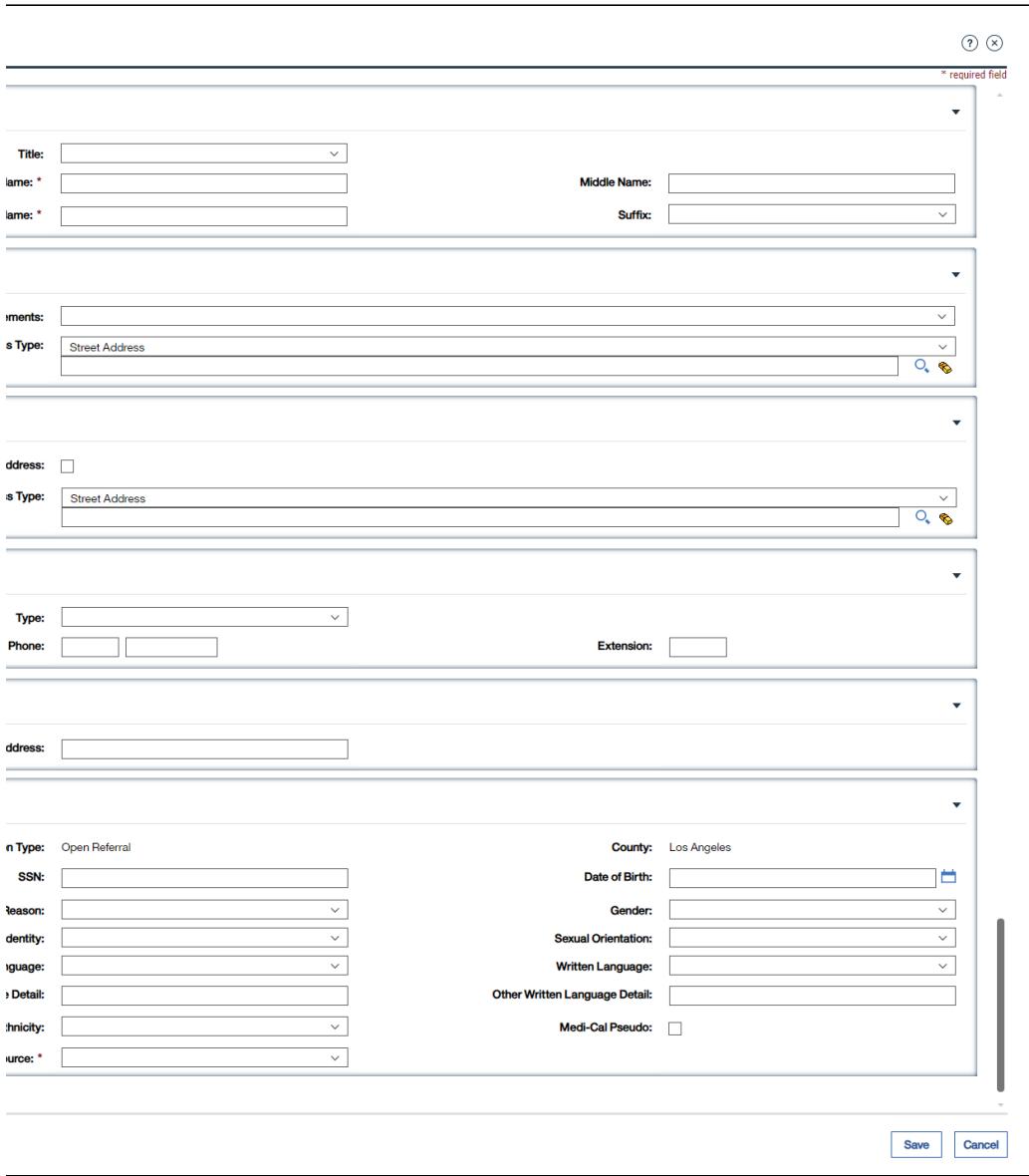
The following data elements are associated with the Modify Person pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name					
Title	Title of the Person	Drop-down list	No	No	Yes
Name Change Effective Date	Effective Date of Person name change	Date (MM/DD/YYYY)	Yes	Last date field was updated	Yes
First Name	First Name of the Person	String	Yes	No	Yes
Middle Name	Middle Name of the Person	String	No	No	Yes
Last Name	Last Name of the Person	String	Yes	No	Yes
Suffix	Suffix of the Person	Drop-down list	No	No	Yes
Details					
Case Number	Case Number of the Person	Number	No	No	No
Blank SSN Reason	Reason SSN field was left blank	String	No	No	No
Taxpayer ID	Indication from Alternative ID – Type Taxpayer ID field	String	No	No	No
Medi-Cal Pseudo	Allows user to indicate if the Medi-Cal ID is a Pseudo SSN	Check-box	No	Yes, unchecked	Yes
Person Type	Person Type	String	No	No	No
County	County of Residence of the Person	String	No	No	No
Meets Residency Requirements	Meets Residency Requirements	Drop-down list	No, required only when Person Type is Applicant or Recipient	No	Yes
Referral Source	Referral Source	String	No, required only when Person Type is Applicant or Recipient	No	No
Date of Birth	Date of Birth of the Person)	Date (MM/DD/YYYY)	No, required only when Person Type is other than Referral	No	Yes
Gender	Gender of the Person	Drop-down list	No, required only when Person Type is other than Referral	No	Yes
Gender Identity	Gender Identity of the person (Not available to Person Type: Provider)	Drop-down list	No	No	Yes
Sexual Orientation	Sexual Orientation of the person (Not available to Person Type: Provider)	Drop-down list	No	No	Yes
Spoken Language	Spoken Language of the Person	Drop-down list	No, required only when Person Type is other than Referral	No	Yes
Written Language	Written Language of the Person	Drop-down list	No, required only when Person Type is other than Referral	No	Yes
Other Spoken Language Detail	Other Spoken Language of the Person Note: Character maximum of 25	String	No	No	Yes
Other Written Language Detail	Other Written Language of the Person Note: Character maximum of 25	String	No	No	Yes
Ethnicity	Ethnicity of the Person	Drop-down list	No, required only when Person Type is Applicant or Recipient	No	Yes
Date of Death	Date of Death	Date (MM/DD/YYYY)	No	No	Yes
Reported Date of Death	Date death was reported	Date (MM/DD/YYYY)	No, required when Date of Death is indicated	No	Yes
Death Outcome	Allows user to select the Outcome of Death Verification	Drop-down list	No, required when Date of Death is indicated	No	Yes
Death Notification Source	System-generated or user-selected source of death notification	Drop-down list	No. Required if Date of Death indicated	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Referral

CI	Document Name
 CI-67784 - DSD SC Create Referral IMPLEMENTED	DSD_SC_Create_Referral.doc

When the Continue Referral link is selected from the Person Search screen the Create Referral pop-up displays.



The screenshot shows a detailed form for creating a referral. At the top right are help and close buttons. Below is a note about required fields. The form is divided into several sections:

- Personal Information:** Title, First Name, Middle Name, Last Name, Suffix.
- Address:** Street Address, City, State, Zip, Type (e.g., Street Address), Address 2.
- Phone:** Type, Phone Number, Extension.
- Demographics:** County (Los Angeles), Date of Birth, Gender, Sexual Orientation, Written Language, Other Written Language Detail, Medi-Cal Pseudo.
- Identity:** SSN, Reason, Identity, Language, Detail, Nationality, Source.

At the bottom are Save and Cancel buttons.

Figure – Create Referral

Actions/Functions

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

Action	Function
Save	Saves the data on the screen and creates a person record with the Person Type of Open-Referral
Cancel	Cancels the action and returns the user to Person Search screen

Residence Address Look-up	Displays the Maintain Street Address screen to add and verify address with the address validation and standardization service
Mailing Address Look-up	Displays the Maintain Address screen associated with the Type indicated to add and verify address with the address validation and standardization service

Data Elements

The following data elements are associated with Create Referral pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name					
Title	Title	Drop-down list	No	No	Yes
First Name	First name	String	Yes	No	Yes
Middle Name	Middle name	String	No	No	Yes
Last Name	Last name	String	Yes	No	Yes
Suffix	Suffix	Drop-down list	No	No	Yes
Residence Address					
Meets Residency Requirements	Meets residency requirements	Drop-down list	No	No	Yes
Residence Address Type	Type of residence address.	Drop-down list	No	Street Address	Yes
	Residence address	String	Either Residence Address or Phone Number is Required	No	Yes
Mailing Address					
Same as Residence Address	Check Box to indicate that mailing address is same as residence address	Check Box	No	Unselected	Yes
Mailing Address Type	Type of mailing address	Drop-down list	No	Street Address	Yes
	Mailing address	String	No	No	Yes
Primary Phone Number					
Type	Phone type	Drop-down list	No	No	Yes
Phone	Phone number including area code	Number	Either Residence Address or Phone Number is Required	No	Yes
Extension	Extension of phone number	Number	No	No	Yes
Email Address					
Email Address	Email Address	String	No	No	Yes
Details					
Person Type	Person type	String	No	Open Referral	No
County	County	String	No	User's County	No
SSN	SSN	Number	No	No	Yes
Date of Birth	Date of birth	Date (MM/DD /YYYY)	No	No	Yes
Blank SSN Reason	Reason SSN field was left blank	Drop-down list	No. Yes, if SSN is left blank	No	Yes
Gender	Gender	Drop-down list	No	No	Yes
Gender Identity	Gender Identity of the person	Drop-down list	No	No	Yes
Sexual Orientation	Sexual Orientation of the person	Drop-down list	No	No	Yes
Spoken Language	Spoken language	Drop-down list	No	No	Yes
Written Language	Written language	Drop-down list	No	No	Yes

Other Spoken Language Detail	Other Spoken Language of the Person Note: Character maximum of 25	String	No	No	Yes
Other Written Language Detail	Other Written Language of the Person Note: Character maximum of 25	String	No	No	Yes
Ethnicity	Ethnicity	Drop-down list	No	No	Yes
Medi-Cal Pseudo	User can check this box if the Medi-Cal ID is a pseudo SSN	Check-box	No	No	Yes
Referral Source	Referral source	Drop-down list	Yes	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Application

CI	Document Name
CI-67788 - DSD SC Create Application IMPLEMENTED	DSD_SC_Create_Application.doc

When the Continue Application link is selected from the Person Search screen the Create Application pop-up displays. This screen allows a user to enter the data necessary to begin the application process.

The screenshot shows a 'Create Application' pop-up window with the following fields:

- Middle Name: [Text Input]
- Suffix: [Text Input]
- Address: [Text Input]
- City: [Text Input]
- State: [Text Input]
- Zip: [Text Input]
- Extension: [Text Input]
- County: Los Angeles
- Referral Source: [Text Input]
- Date of Birth: 10/01/1988
- Ethnicity: [Text Input]
- Sexual Orientation: [Text Input]
- Written Language: English
- Other Written Language Detail: [Text Input]
- Medi-Cal Pseudo: [checkbox]

At the bottom left are 'Cancel' and 'Create Case' buttons.

Figure – Create Application

Actions/Functions

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

Actions		Function			
Cancel		Cancels the action returning the user to the Person Search screen			
Create Case		When the Create Case link is selected, the data is saved to the Person Record and the Create Case pop-up displays			
Residence Address Look-up		Displays the applicable Maintain (Residence) Address screen to create/modify address and verify address with the address validation and standardization service.			
Mailing Address Look-up		Displays the applicable Maintain (Mailing) Address screen to create/modify address and verify address with the address validation and standardization service.			

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name					
Title	Title of name	Drop-down list	No	No	Yes
First Name	First name	String	Yes	No	Yes
Middle Name	Middle name	String	No	No	Yes
Last Name	Last name	String	Yes	No	Yes
Suffix	Suffix of name	Drop-down list	No	No	Yes
Residence Address					
Meets Residency Requirements	Meets residency requirements	Drop-down list	Yes	No	Yes
Residence Address Type	Type of Residence Address	Drop-down list	Yes	Street Address	Yes
	Residence address	String	Yes	No	Yes
Mailing Address					
Same as Residence Address	Check box to indicate that mailing address is same as residence address	Check Box	Yes Note: Either Same As Residence Address box is checked or a Mailing Address must be indicated	Unselected	Yes
Mailing Address Type	Type of Mailing Address.	Drop-down list	Yes	No	Yes
	Mailing address	String	Yes Note: Either Same As Residence Address box is checked or a Mailing Address must be indicated	No	Yes
Primary Phone Number					
Type	Phone type	Drop-down list	No	No	Yes
Phone	Phone number including area code	Number	No	No	Yes
Extension	Extension of phone number	Number	No	No	Yes
Email Address					
Email Address	Email address	String	No	No	Yes

Details					
Person Type	Person type	String	No	Open Referral Note: Applicant Person Type will be retained if the Create Case pop-up is saved and a CMIPS case is created. If either the Create Application or the Create Case pop-ups are cancelled the Person Type will revert to Open Referral or if the record did not originate from an Open Referral, the Person information will not be saved.	No
County	County	Drop-down list	No	User's County	No
SSN	SSN	Number	No Note: Either the SSN, Pseudo SSN or the Applied For SSN is required	No	Yes
Referral Source	Referral source	Drop-down list	Yes	No	Yes
Blank SSN Reason	Reason SSN field was left blank	Drop-down list	No. Yes, if SSN is left blank	No	Yes
Date of Birth	Date of birth	Date MM/DD /YYYY	Yes	No	Yes
Gender	Gender	Drop-down list	Yes	No	Yes
Ethnicity	Ethnicity	Drop-down list	Yes	No	Yes
Gender Identity	Gender Identity of the person	Drop-down list	No	No	Yes
Sexual Orientation	Sexual Orientation of the person	Drop-down list	No	No	Yes
Spoken Language	Spoken language	Drop-down list	Yes	No	Yes
Written Language	Written language	Drop-down list	Yes	No	Yes
Other Spoken Language Detail	Spoken language if not listed in the Spoken Language drop-down	String	No	No	Yes
Other Written Language Detail	Written language if not listed in the Written Language drop-down	String	No	No	Yes
Medi-Cal Pseudo	User can check this box if the Medi-Cal ID is a pseudo SSN	Check-box	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Case

CI	Document Name
CI-67772 - DSD SC Create Case IMPLEMENTED	DSD_SC_Create_Case.doc

When the Create Case link is selected from the Create Application pop-up the Create Case pop-up displays.

Figure - Create Case

Actions/Functions

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

Action	Function
Save	Saves the Create Case pop-up data. When all edits are passed the IHSS case is created.
Cancel	Cancels the Create Case action and returns the user to Person Search screen
Assign Worker – Look-up	Displays User Search pop-up to allow the assignment of a case owner to the case
Client Index Number – Look-up	Displays the Statewide Client Index – CIN Search screen.

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Applicant Information					
Applicant Name	Name of the applicant Order: First Last	String	No	System Populated	No
ZIP Code	ZIP code of the applicant	Number	No	System Populated	No
Spoken Language	Spoken language of the applicant	String	No	System Populated	No
Written Language	Written language of the applicant	String	No	System Populated	No
Create Case					

IHSS Referral Date	IHSS Referral Date of the applicant. This field may be post-dated up to two weeks from the displayed date	Date (MM /DD/YYYY)	Yes	System defaults to date Referral or Application created	Yes
Interpreter Available	Interpreter available	Check Box	No	Unselected	Yes
Assigned Worker	Assigned worker	String	Yes	No	Yes
Client Index Number	CIN of the applicant	Number	No	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/User Search

CI	Document Name
CI-67746 - DSD SC User Search IMPLEMENTED	DSD_SC_User_Search.doc

When the Assign Worker icon is selected from the Create Case pop-up or the Change link is selected from Case Home Case Worker, the User Search pop-up displays. This screen allows the user to search and select to whom the case will be assigned. When a case owner is selected from the Search Results list, the Create Case pop-up or Case Home displays with the selected case owner populated to the Assign Worker or Case Owner field. The users displayed on the search will be those individuals associated with the user's county.

Figure - User Search

Actions/Functions

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

Action	Function
Search Criteria	
Search	The Search action executes the search based on the user-entered criteria
Reset	The Reset action clears all of the search criteria fields
Cancel	The Cancel action returns the user to the Create Case pop-up OR to Case Home based on how the pop-up was accessed.
Search Results	
Select	Selects the associated user, returns the user to the Create Case pop-up, populating the selected Worker Number to the Assign Worker field OR to Case Home, populating the selected Worker Number to the Case Worker field based on how the pop-up was accessed.

Data Elements – Search Criteria

The following data elements are associated with User Search Criteria:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Worker Number	CMIPS user ID of the worker	String	No	No	Yes
Username	The user name associated with a CMIPS user	String	No	No	Yes
First Name	First name of the user	String	No	No	Yes
Last Name	Last name of the user	String	No	No	Yes
District Office	Drop-down will be populated with all the district offices in the county	Drop-down list	No	No	Yes
Unit	Unit drop-down will be populated with all units associated with the district office	Drop-down list	No	No	Yes
ZIP Code	ZIP code	Number	No	No	Yes
Position Name	Position name of the user	String	No	No	Yes
Language	Language	Drop-down list	No	No	Yes

Data Elements – Search Results

The following data elements are associated with User Search Results:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
First Name	First name of the worker	String	No	No	No
Last Name	Last name of the worker	String	No	No	No
Worker Number	Worker number	String	No	No	No
District Office	District office to which the worker is associated	String	No	No	No
Language 1	Language 1 of the worker	String	No	No	No
Language 2	Language 2 of the worker	String	No	No	No
Case Count	Case Count – Case counts will not be dynamic but loaded daily from a nightly batch job that counts the number of Active Status cases assigned to the Worker.	Number	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Statewide Client Index - CIN Search

CI	Document Name
CI-67768 - DSD SC Statewide Client Index CIN Search IMPLEMENTED	DSD_SC_Statewide_Client_Index_CIN_Search.doc

When the CIN search link is selected from Create Case pop-up, the Statewide Client Index - CIN Search pop-up displays with a list of records from the SCI which are full or partial matches to applicant information based upon the OI (CIN Search) Send and Return transaction to SCI. From the returned list of possible matches, the user may select the MEDS Eligibility link to view further Medi-Cal eligibility information. If there are no matching records in the SCI, the Search Results will be blank.

If no records are found matching the Search Criteria, the message "CIN does not exist for the applicant" will display.

The screenshot shows a modal dialog box titled "Index - CIN Search". At the top right are a help icon and a close button. Below the title, a message says "If no records are found, please review matches to obtain Medi-Cal Eligibility record. If matches are invalid select Cancel." The main search area has fields for Last Name, First Name, Gender (Male), Date Of Birth, CIN, and SSN. Below this is a table with columns SN, First Name, Last Name, Suffix, Gender, DOB, and MEDS. A single row is shown with values: SN [redacted], First Name [redacted], Last Name [redacted], Suffix [redacted], Gender Male, DOB [redacted], and MEDS [redacted]. The MEDS column contains a blue link labeled "Eligibility". At the bottom right of the modal is a "Cancel" button.

Figure - Statewide Client Index - CIN Search

Actions/Functions

The following actions are associated with the Statewide Client Index – CIN Search pop-up:

Action	Function
Cancel	Cancels the action and returns the user to Create Case pop-up

<Eligibilit y>	When the Eligibility link is selected, the MEDS Eligibility Information screen displays the MEDS Information associated with the selected SCI – CIN record. CMIPS sends an EL - Medi-Cal Eligibility Request transaction to SCI. In response, SCI returns an OM – Medi-Cal Eligibility Return transaction to CMIPS. If the transaction is not successful, an message will be displayed on this screen
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Data Elements – CIN Search Criteria

The following data elements are associated with Statewide Client Index – CIN Search Criteria:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Last Name	Last name	String	No	System Populated	No
First Name	First name	String	No	System Populated	No
Gender	Gender	String	No	System Populated	No
Date of Birth	Date of birth	Date (MM/DD/YYYY)	No	System Populated	No
CIN	Client Index Number	String	No	System Populated	No
SSN	SSN	String	No	System Populated	No

Data Elements – CIN Search Results

The following data elements are associated with Statewide Client Index – CIN Search Results:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
CIN	Client Index Number	String	No	No	No
SSN	SSN	String	No	No	No
First Name	First name	String	No	No	No
Last Name	Last name	String	No	No	No
Suffix	Suffix	String	No	No	No
Gender	Gender	String	No	No	No
DOB	Date of birth	Date (MM/DD/YYYY)	No	No	No
MEDS	MEDS Eligibility information	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Medi-Cal Eligibility Information

CI	Document Name
CI-121490 - DSD SC MediCal Eligibility Information-SCI Lookup IMPLEMENTED	DSD_SC_MediCal_Eligibility_Information-SCI_Lookup.doc

When the Eligibility link is selected from the Statewide Client Index - CIN Search pop-up the Medi-Cal Eligibility Information pop-up displays. This pop-up allows the user to view Medi-Cal Eligibility Information associated with the selected record. CMIPS sends an EL - Medi-Cal Eligibility Request transaction to SCI. In response, SCI returns an OM Medi-Cal Eligibility Return transaction data to CMIPS. If the transaction is not successful, an error message will be displayed on this pop-up. Not all data fields will be indicated, as not all data elements are included on the OM transaction.

The screenshot shows a modal dialog titled "Medi-Cal Eligibility Information - Home: [REDACTED]". At the top right are a question mark icon and a close button. Below the title are two buttons: "Select" and "Cancel". The main content area contains various data fields grouped into pairs:

Eligibility Month:	11/2020	Last Updated:	[REDACTED]
Medi-Cal Eligibility Status:	999	Record Type:	[REDACTED]
Medi-Cal Aid Code:	[REDACTED]	FFP:	No
Medi-Cal Share Of Cost:	\$0.00	BIC Issue Date:	[REDACTED]
Medi-Cal County ID:	San Diego	Medi-Cal County Serial:	[REDACTED]
County FBU:	[REDACTED]	County Person Number:	[REDACTED]
MEDS ID:	[REDACTED]	Medi-Cal Date of Birth:	[REDACTED]
SSN Verification Code:	[REDACTED]	Medi-Cal Denial Reason:	Other
SSI Living Arrangement:	[REDACTED]	Medi-Cal Denial Date:	[REDACTED]
Optional Living Arrangement:	[REDACTED]	Refugee Alien Status:	[REDACTED]
Date of Death:	[REDACTED]	INS Date Of Entry:	[REDACTED]
Death Source:	[REDACTED]	Identity Document Type:	[REDACTED]
CIN:	[REDACTED]	Citizenship Document Type:	[REDACTED]
Disability Onset Date:	[REDACTED]	RV Due Month:	[REDACTED]
Application Date:	[REDACTED]	Last RV Completed Date:	[REDACTED]

At the bottom of the modal are two buttons: "Select" and "Cancel".

Figure - Medi-Cal Eligibility Information

Actions/Functions

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

Action	Function
Select	Selects the indicate record returning the user to the Create Case pop-up displaying the selected CIN in the Client Index Number field
Cancel	Cancels this screen and returns to SCI Search screen

Data Elements

For a detailed description of the Data Elements, see [View Medi-Cal Eligibility](#).

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/CIN data does not match Applicant data Screen

CI	Document Name
CI-67766 - DSD SC CIN Data Does Not Match Applicant Data IMPLEMENTED	DSD_SC_CIN_Data_Does_Not_Match_Applicant_Data.doc

When the data associated with the CIN record selected from the Medi-Cal Eligibility Information screen is not an exact match the demographic data on the Create Case pop-up (Name, SSN, Gender or Date of Birth), the "CIN data does not match Applicant data" screen displays. The SCI EL transaction execution will determine if the case demographic and CIN data match.

When this screen displays, the user must return to the CIN Select screen. If no records match the applicant information on the Create Case pop-up, select the Close link and return to the Create Case pop-up without choosing a CIN.

If this screen displays and it is determined that the IHSS case applicant demographic information is incorrect, the user will return to the Create Case pop-up and choose the Cancel link. This action will save the Person Record as a Person Type, Open Referral. The user must then take the appropriate action to update the erroneous information on the Person screen and then again process through the Create Application and Create Case pop-up.

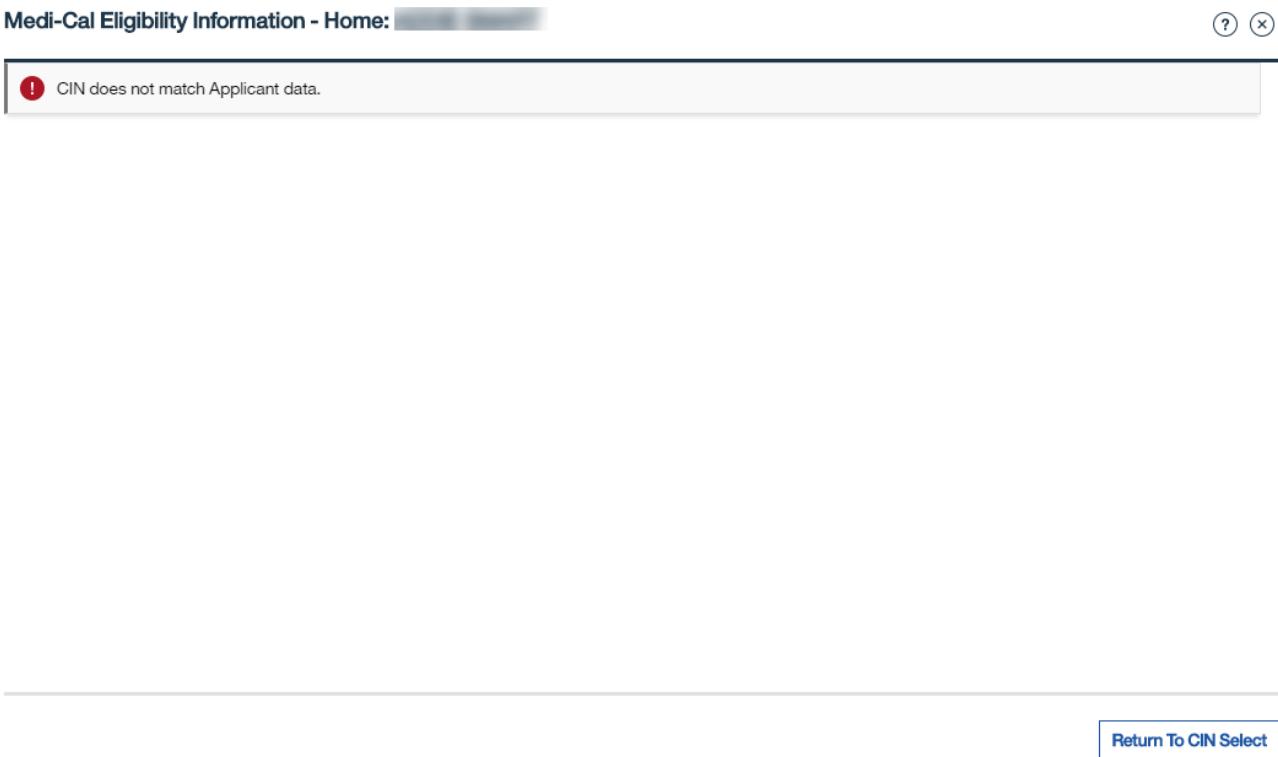


Figure - CIN data does not match Applicant data

Actions/Functions

The following actions are associated with the "CIN data does not match Applicant data" pop-up:

Action	Function
Return to CIN Select	Returns the user to the CIN Select screen to review the list of SCI CINs

Data Elements

There are no data elements associated with the "CIN data does not match Applicant data" pop-up.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Case without CIN

CI	Document Name
CI-67785 - DSD SC Create Case without CIN IMPLEMENTED	DSD_SC_Create_Case_without_CIN.doc

When the Save link is selected from the Create Case pop-up and the Client Index Number field is blank or the record selected does not have active Medi-Cal Eligibility the information message "CIN not selected, Medi-Cal Eligibility Referral will be sent to SAWS" displays.

When a case is created without a CIN, an S1 – IHSS Referral for Medi-Cal Eligibility Determination transaction is sent to the County SAWS requesting a Medi-Cal Eligibility Determination for the IHSS Applicant.

Figure - Create Case without CIN

Actions/Functions

The following actions are allowed when the information message "CIN not selected, Medi-Cal Eligibility Referral will be sent to SAWS" displays on the Create Case pop-up.

Action	Function
Continue	Continues the Create Case action displaying the Case Home screen, sending the S1 – IHSS Referral for Medi-Cal Eligibility Determination transaction to the county SAWS
Cancel	Cancels the action, saves the Person record as Open-Referral and returns the user to a blank Create Application pop-up

Data Elements

For a detailed description of the Data Elements, see [Create Case](#).

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Home

CI	Document Name
CI-67762 - DSD SC Case Home IMPLEMENTED	DSD_SC_Case_Home.doc

When the Create Case link is selected from the Create Case pop-up, the case number is searched from My Workspace, or when the Case Number link is selected from the Person Home or SW User Workload screens, the Case Home displays.

The screenshot shows the CMIPS II Case Management Information Payroll System II Case Home page. The page has a header with tabs for Inbox, Caseload By Users, time & Travel, and Quality Assurance. Below the header, there is a toolbar with an Edit button, a New Application button, and a Rescind button. The main content area contains several sections of form fields:

- Case Details:** Case Number: [REDACTED], Status: [REDACTED], Status Date: 12/01/2011, Resource Suspension End Date: [REDACTED], County: [REDACTED], District Office: [REDACTED], Case Owner: [REDACTED] [Change], Companion Case: No, State Hearing: No, Mail Designee: [REDACTED].
- County Use:** County Use 1: [REDACTED], County Use 2: [REDACTED], County Use 3: [REDACTED], County Use 4: [REDACTED].
- Mailing Address:** Mailing Address: [REDACTED].
- Date Time:** Date Time: 10/20/2013 22:42, Created By: SYSTEM, Date Time: 10/20/2013 22:42, Created By: SYSTEM.

Figure – Case Home

Context Panel

For Context Panel information, please refer to [Case Management Header - Case Perspective](#).

Content Tabs & Page Navigation

For Content Tabs & Page Navigation, please refer to [Case Home Navigation](#).

Actions/Functions

The following actions are associated with the Case Home screen. The actions displayed in the Manage cluster of the screen will be dependent upon the Status.

Actions	Function
Edit	Displays the Modify Case screen. Allowed on any Case Status
Withdraw	Initiates Case Withdraw action. Only displays when Case Status is Pending
Leave	Initiates Leave action. Only displays when Case Status is Eligible or Presumptive Eligible
Terminate	Initiates Case Terminate action. Only displays when Case Status is Eligible, Presumptive Eligible or Leave
New Application	Initiates the reactivate case action on case with the Case Status of Application Withdrawn, Terminated or Denied. Only displays when Case Status is Withdrawn, Denied or Terminated. Note: This link does not display if a case has been terminated of non-compliance with Medi-Cal (NOA TR25) within the past 90 calendar days.
Rescind	Initiates the Rescind action on a case terminated or denied case. Only displays when Case Status is Denied or Terminated.
Recipient Name	Displays Person Home screen for the Recipient
Case Owner	Displays User Home screen for the Case Owner
Change	Displays the User Search pop-up allowing the reassignment of the case
View All Changes	Displays the View All Changes list screen.

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Case Number	Case Number	Number	No	No	No
Status	Case Status	String	No	No	No
Recipient Name	Name of the Recipient (First Name Last Name)	String	No	No	No
Status Date	The date the current status was assigned to the case	Date (MM/DD/YYYY)	No	No	No
IHSS Referral Date	IHSS Referral Date of the Recipient	Date (MM/DD/YYYY)	No	No	No
Resource Suspension End Date	Resource Suspension End Date	Date (MM/DD/YYYY)	No	No	No
IHSS Application Date	IHSS Application Date of the Recipient	Date (MM/DD/YYYY)	No	No	No
County	County to which the case is assigned	String	No	No	No
Medi-Cal Eligibility Referral Date	Medi-Cal Eligibility Referral Date of Recipient	Date (MM/DD/YYYY)	No	No	No
District Office	District Office to which the case is assigned based upon the Case Owner assignment	String	No	No	No
Medi-Cal Initial Eligibility Notification Date	Medi-Cal Initial Eligibility Notification Date of Recipient	Date (MM/DD/YYYY)	No	No	No
Case Owner	Worker responsible for the case	String	No	No	No
In-Home Visit Date	The date of the last In-Home Visit	Date (MM/DD/YYYY)	No	No	No
Companion Case	Companion Case	String	No	No	No
Interpreter Available	Indicates whether or not an Interpreter is Available at the Recipient's home	String	No	No	No
State Hearing	Indicates whether a Requested or Scheduled Status State Hearing exists	String	No	No	No
Number of Household Members	Number of Household Members including Recipient	Number	No	No	No

Mail Designee	Mail Designee	String	No	No	No
Number of Active Providers	The number of Active Providers currently associated with the case. This field is updated through a nightly batch job.	Number	No	No	No
County Use – Special Project Coding					
County Use 1	Free text field that can be used by a county for special project coding	String	No	No	No
County Use 2	Free text field that can be used by a county for special project coding	String	No	No	No
County Use 3	Free text field that can be used by a county for special project coding	String	No	No	No
County Use 4	Free text field that can be used by a county for special project coding	String	No	No	No
County Use Comments					
County Use Comments	County Use Comments	String	No	No	No
Contact Information					
Residence Address	Residence Address of the Recipient	String	No	No	No
Mailing Address	Mailing Address of the Recipient	String	No	No	No
Primary Phone Number	Primary Phone Number of the Recipient	Number	No	No	No
Recent Changes					
Event Type	Type of the Case Change	String	No	No	No
Date Time	Date and Time of the Case change	Date Time(MM/DD /YYYY HH:MM)	No	No	No
Created By	User who triggered the change	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Cases

CI	Document Name
CI-67744 - DSD SC Cases List	IMPLEMENTED DSD_SC_Cases_List.doc

When the Cases link is selected from the Person, Provider content tab, the Cases screen displays the case(s) associated with the person record.

County	Case Status	Auth Hours	Provider Status	Assigned Hours	PDD Status
Los Angeles	Terminated	00:00	Terminated	00:00	No
Los Angeles	Terminated	00:00	Terminated	00:00	No

Figure - Cases

Actions/Functions

The following actions are associated with the Cases screen:

Action	Function
Case Name	Displays the Case Home screen
Case Owner	Displays the User's Home screen

Data Elements

The following data elements are associated with the Cases screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Case Name	Case Name (Applicant, Recipient or Provider) (First Name Last Name)	Number	No	No	No
Case Owner	Owner of the Recipient Case (First Name Last Name)	String	No	No	No
County	County of residence	String	No	No	No
Case Status	The Case Status of the IHSS Case	String	No	No	No
Auth Hours	Recipient Authorized Hours display in HH:MM format	Integer	No	No	No
Provider Status	Provider Status related to the Recipient Case. This is the Provider Status for IHSS Providers only.	String	No	No	No
Assigned Hours	Provider Assigned Hours display in HH:MM format	Integer	No	No	No
PDD Status	Provider Direct Deposit Status	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Phone Numbers

CI	Document Name
CI-67747 - DSD SC Phone Numbers IMPLEMENTED	DSD_SC_Phone_Numbers.doc

When the Phone Numbers link is selected from the Person left navigation, the Phone Numbers screen displays. This screen allows the user to view a list of all phone numbers associated with the Person. A phone number cannot be modified retrospectively because this change would potentially conflict with previous contacts with the person.

The screenshot shows the CMIPS II Case Management Information Payroll System II interface. The top navigation bar includes 'Case Number' and 'Welcome'. Below the navigation, there are links for 'My Cases', 'Inbox', and 'Caseload By Users'. The main content area is titled 'Phone & Travel Time'. A table displays the following data:

Primary	Type	Phone Number	Extension	From	To
Yes	Home	111-222-3333		11/26/2019	

Figure – Phone Numbers

Actions/Functions

The following actions are associated with the Phone Numbers screen:

Action	Function
New	Displays the Create Phone Number screen
View	Displays the View Phone Number screen
Edit	Displays the Modify Phone Number screen

Data Elements

The following data elements are associated with the Phone Numbers screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Primary	Indicates whether a phone number is the Primary Phone Number. Only one Primary Phone Number is allowed per person record	String (Yes /No)	No	No	No

Type	Phone Number Type Note: Only one current phone number of each type is allowed.	String	No	No	No
Phone Number	Phone Number of Person including Area Code	Number	No	No	No
Extension	Extension of Phone Number	Number	No	No	No
From	From Date of Phone Number	Date (MM/DD /YYYY)	No	No	No
To	End Date of Phone Number	Date (MM/DD /YYYY)	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Phone Number

CI	Document Name
CI-67760 - DSD SC Create Phone Number IMPLEMENTED	DSD_SC_Create_Phone_Number.doc

When the New Link is selected on the Phone Numbers screen the Create Phone Number pop-up displays.

Create Phone Number: [REDACTED] ? ×

* required field

Details

Type: * Primary:

From: *

Phone Number: * Extension:

Comments

Save Save & New Cancel

Figure – Create Phone Number

Actions/Functions

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

Action	Function
Save	Save the entered data and displays the Phone Numbers screen
Save & New	Saves the entered data and displays another Create Phone Number pop-up
Cancel	Cancels the action displaying the Phone Numbers screen

Data Elements

The following data elements are associated with the Create Phone Number pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Type	Phone Number Type	Drop-down list	Yes	No	Yes
Primary	Indicates the Phone Number as the person Primary	Check Box	No	Unselected	Yes
From	From Date of Phone Number	Date (MM/DD /YYYY)	Yes	System Generated to Current Date	Yes
Phone Number	Phone Number of Person	Number	Yes	No	Yes
Extension	Extension of Phone Number	Number	No	No	Yes
Comments	Comments (200 characters)	String	No	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Phone Number

CI	Document Name
CI-67771 - DSD SC View Phone Number IMPLEMENTED	DSD_SC_View_Phone_Number.doc

When the View link is selected from the Phone Numbers screen, the View Phone Number screen displays.

Figure - View Phone Number

Actions/Functions

The following actions are associated with the View Phone Number screen:

Action	Function
Edit	Displays the Modify Phone Number screen
Close	Closes the screen and displays the Phone Numbers screen

Data Elements

The following data elements are associated with the View Phone Number screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Type	Phone Number Type	String	No	No	No
Primary	Indicates whether or not this phone number is the person's primary phone number	String	No	No	No
From	From Date of Phone Number	Date (MM/DD/YYYY)	No	No	No
To	End Date of Phone Number	Date (MM/DD/YYYY)	No	No	No

Phone Number	Phone Number of Recipient	Number	No	No	No
Extension	Extension of Phone Number	Number	No	No	No
Comments	Comments (200 characters)	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Phone Number

CI	Document Name
CI-67778 - DSD SC Modify Phone Number IMPLEMENTED	DSD_SC_Modify_Phone_Number.doc

When the Edit link is selected from the Phone Numbers screen or the View Phone Number screen the Modify Phone Number pop-up displays. A phone number may only be modified if the current date is the displayed From date; the From date may not be modified. If the From date has passed the New action is required to create a new phone number.

Figure - Modify Phone Number

Actions/Functions

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

Action	Function
Save	Saves the entered data and displays the Phone Numbers screen
Cancel	The Cancel action returns the user to the Phone Numbers screen

Data Elements

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

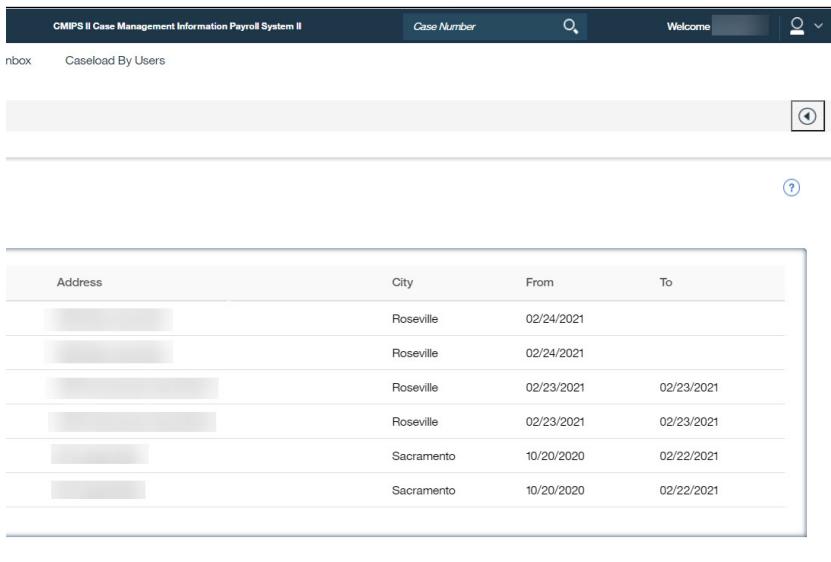
Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Type	Phone Number Type	String	No	No	No
Primary	Primary Indicator of the Phone Number	Check Box	No	Unselected	Yes

From	From Date of Phone Number	Date (MM/DD/YYYY)	No	No	No
Phone Number	Phone Number of Recipient	Number	Yes	No	Yes
Extension	Extension of Phone Number	Number	No	No	Yes
Comments	Allows entry of comments regarding the phone number Comments (200 characters)	String	No	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Addresses

CI	Document Name
 CI-67776 - DSD SC Addresses IMPLEMENTED	DSD_SC_Addresses.doc

When the Addresses link is selected from the Person left navigation menu, the Addresses list screen displays. This screen allows the user to view a list of all addresses associated with the Person. An address cannot be modified retrospectively because this change would potentially conflict with previous mailing to the person.



Address	City	From	To
[REDACTED]	Roseville	02/24/2021	
[REDACTED]	Roseville	02/24/2021	
[REDACTED]	Roseville	02/23/2021	02/23/2021
[REDACTED]	Roseville	02/23/2021	02/23/2021
[REDACTED]	Sacramento	10/20/2020	02/22/2021
[REDACTED]	Sacramento	10/20/2020	02/22/2021

Figure - Addresses

Actions/Functions

The following actions are associated with the Addresses screen:

Actions	Function
New	Displays the Create Address screen
View	Displays the View Address screen
Edit	Displays the Maintain Address screen

Data Elements

The following data elements are associated with the Addresses screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Type	Address Type (Residence, Mailing)	String	No	No	No
Address	Address	String	No	No	No
City	City	String	No	No	No
From	From Date of the Address	Date (MM/DD/YYYY)	No	No	No
To	To Date of the Address	Date (MM/DD/YYYY)	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Address

CI	Document Name
CI-67755 - DSD SC Create Address IMPLEMENTED	DSD_SC_Create_Address.doc

When the New action is selected from the Addresses screen the Create Address pop-up displays allowing the creation of a new address. After the Address and Type field indications are made, selecting the search icon (magnifying glass) displays the appropriate Maintain Address pop-up.

The screenshot shows a 'Create Address' dialog box. At the top right are help and close buttons. Below the title, there's a note: '* required field'. The main area has two dropdown menus: 'Address:' set to 'Residential' and 'Type:' which includes a search icon. A checkbox labeled 'Use As Mailing Address' is present. At the bottom are 'Save' and 'Cancel' buttons.

Figure – Create Address

Actions/Functions

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

Action	Function
Save	Saves data and displays the Addresses screen
Cancel	Cancels the action and displays the Addresses screen
Search	Displays the appropriate Maintain Address screen

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Address	Allows user to select Mailing or Residence Address	Drop-down list	Yes	No	Yes
Type	Allows user to select appropriate address type	Drop-down list	Yes	No	Yes

Use as Mailing Address	Allows user to indicate if a Residence Address should also be used as the Mailing Address. This cluster will only display for "Residence" Address Type records.	Checkbx	No	No	Yes
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DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Street Address

CI	Document Name
CI-67773 - DSD SC Maintain Street Address IMPLEMENTED	DSD_SC_Maintain_Street_Address.doc

When the Edit link associated with a Residence Address with a Type of Street Address is selected or when the search icon is selected from the Create Address screen where the Address is Residence and the Type is Street Address, the Maintain Street Address pop-up displays. When the Verify link is selected, the address validation and standardization service is executed. The address keyed, along with any verified addresses, will display in the Addresses cluster.

Maintain Street Address: [REDACTED] (?) (X)

* required field

Details

From: * Calendar

Address

Number *	<input type="text"/>	Pre	<input type="text"/>
Street *	<input type="text"/>	Suffix	<input type="text"/>
Post	<input type="text"/>	Unit Type	<input type="text"/>
Unit Number	<input type="text"/>	City *	BURBANK
State *	California	Zip *	91505-3551

Verify Cancel

Addresses

Action	Address

Figure - Maintain Street Address

Actions/Functions

The following actions are associated with the Maintain Street Address pop-up:

Action	Function

Verify	Performs address verification against the address validation and standardization service. The address validation and standardization service does not require the entry of a ZIP code
Cancel	Cancels the action and displays the Create Address screen
Select	Selects and saves the indicated address record, displaying that record on the Create Address screen

Data Elements

The following data elements are associated with the Maintain Address pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
From	The date from which the address will be effective	Date (MM/DD/YYYY)	Yes	No	Yes
Street Address					
Number	Street Number	Number	Yes	No	Yes
Pre	Pre of Street Name	Drop-down list	No	No	Yes
Street	Street Name	String	Yes	No	Yes
Suffix	Suffix of Street Name	Drop-down list	No	No	Yes
Post	Post of Street Name	Drop-down list	No	No	Yes
Unit Type	Unit Type	Drop-down list	No	No	Yes
Unit Number	Unit Number	Number	No	No	Yes
Addresses					
City	City of Address	String	Yes	No	Yes
State	State of Address	Drop-down list	Yes	No	Yes
ZIP	ZIP Code of Address	String	Yes	No	Yes
Addresses (Address Validation and Standardization Service Results)					
Address	Displays the address keyed and any address validation and standardization service addresses	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain PO Box Address

CI	Document Name
CI-67769 - DSD SC Maintain PO Box Address IMPLEMENTED	DSD_SC_Maintain_PO_Box_Address.doc

When the Edit link, associated with a Mailing Address with a Type of PO Box Number, is selected or when the search icon is selected from the Create Address screen where the Address is Mailing and the Type is PO Box Number, the Maintain PO Box Address pop-up displays. When the Verify link is selected, the address validation and standardization service is executed. The address keyed, along with any verified addresses, will display in the Addresses cluster.

The screenshot shows a modal dialog titled "Maintain PO Box Address".

- Details:** Contains a date input field labeled "From: *" with the value "11/18/2020" and a calendar icon. A red asterisk indicates it is a required field.
- Address:** Contains fields for "PO Box *", "City *", "State *", and "Zip *". The "State" dropdown is set to "California". Buttons for "Verify" and "Cancel" are at the bottom.
- Addresses:** A table with columns "Action" and "Address". It currently contains one row with a single entry.

Figure – Maintain PO Box Address

Actions/Functions

The following actions are associated with the Maintain PO Box Address pop-up:

Actions	Function
Verify	Performs address verification against the address validation and standardization service. The address validation and standardization service does not require the entry of a ZIP code

Cancel	Cancels the action and displays the Create Address screen
Select	Selects and saves the indicated address record, displaying that record on the Create Address screen

Data Elements

The following data elements are associated with the Maintain PO Box Address pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
From	The date from which the address will be effective	Date (MM/DD/YYYY)	Yes	No	Yes
PO Box Address					
PO Box	PO Box number	String	Yes	No	Yes
All Addresses					
City	City of Address	String	Yes	No	Yes
State	State of Address	Drop-down list	Yes	No	Yes
ZIP	ZIP Code of Address	String	Yes	No	Yes
Addresses (Address Validation and Standardization Service Results)					
Address	Displays the address keyed and any address validation and standardization service addresses	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Rural Route Address

CI	Document Name
CI-67754 - DSD SC Maintain Rural Route Address IMPLEMENTED	DSD_SC_Maintain_Rural_Route_Address.doc

When the Edit link associated with a Residence Address with a Type of Rural Route Address is selected or when the Save link is selected from the Create Address screen where the Address is Residence and the Type is Rural Route, the Maintain Rural Route Address pop-up displays. When the Verify link is selected, the address validation and standardization service is executed. The address keyed, along with any verified addresses, will display in the Addresses cluster.

The screenshot shows a modal dialog box titled "Maintain Rural Route Address". The window is divided into several sections:

- Details:** Contains a "From:" field set to "11/18/2020" with a calendar icon, and a note "* required field".
- Use as Mailing Address:** Contains a checkbox labeled "Use as Mailing Address: .
- Address:** Contains fields for "Rural Route Address *", "City *", "State *" (set to "California"), and "Zip *" (set to "95833"). It also includes "Verify" and "Cancel" buttons.
- Addresses:** A table with columns "Action" and "Address". It contains two rows of placeholder data: "Action" and "Address".

Figure - Maintain Rural Route Address

Actions/Functions

The following actions are associated with the Maintain Rural Route Address pop-up:

Actions	Function
Verify	Performs address verification against the address validation and standardization service. The address validation and standardization service does not require the entry of a ZIP code
Cancel	Cancels the action and displays the Create Address screen
Select	Selects and saves the indicated address record, displaying that record on the Create Address screen

Data Elements

The following data elements are associated with the Maintain Rural Route Address pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
From	The date from which the address will be effective	Date (MM/DD/YYYY)	Yes	No	Yes
Rural Route Address					
Rural Route Address	Rural Route Address	String	Required for Rural Address Type	No	Yes
All Addresses					
City	City of Address	String	Yes	No	Yes
State	State of Address	Drop-down list	Yes	No	Yes
ZIP	ZIP Code of Address	String	Yes	No	Yes
Addresses (Address Validation and Standardization Service Results)					
Address	Displays the address keyed and any address validation and standardization service addresses	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain General Delivery Address

CI	Document Name
CI-67750 - DSD SC Maintain General Delivery Address IMPLEMENTED	DSD_SC_Maintain_General_Delivery_Address.doc

When the Edit link associated with a Mailing Address with a Type of General Delivery is selected or when the search icon is selected from the Create Address screen where the Address is Mailing and the Type is General Delivery, the Maintain General Delivery Address pop-up displays. When the Verify link is selected, the address validation and standardization service is executed. The address keyed, along with any verified addresses, will display in the Addresses cluster.

The screenshot shows a modal dialog box titled "Maintain General Delivery Address". The window has a header bar with a question mark icon, a close button, and a title "Maintain General Delivery Address: [REDACTED]". Below the header is a note "* required field". The window is divided into four main sections: "Details", "General Delivery", "Address", and "Addresses".

- Details:** Contains a "From:" field with the value "11/18/2020" and a calendar icon.
- General Delivery:** Shows "General Delivery" as the type.
- Address:** Contains fields for "City *" (redacted), "State *" (California), and "Zip *". Below these are "Verify" and "Cancel" buttons.
- Addresses:** A table with columns "Action" and "Address". It contains two rows of data, both of which are redacted.

Figure - Maintain General Delivery Address

Actions/Functions

The following actions are associated with the Maintain General Delivery Address pop-up:

Actions	Function
Verify	Performs address verification against the address validation and standardization service. The address validation and standardization service does not require the entry of a ZIP code
Cancel	Cancels the action and displays the Create Address screen
Select	Selects and saves the indicated address record, displaying that record on the Create Address screen

Data Elements

The following data elements are associated with the Maintain General Delivery Address pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
From	The date from which the address will be effective	Date (MM/DD/YYYY)	Yes	No	Yes
General Delivery Address					
General Delivery	Defaults to General Delivery	String	No	General Delivery	No
All Addresses					
City	City of Address	String	Yes	No	Yes
State	State of Address	Drop-down list	Yes	No	Yes
ZIP	ZIP Code of Address	String	Yes	No	Yes
Addresses (Address Validation and Standardization Service Results)					
Address	Displays the address keyed and any address validation and standardization service addresses	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Highway Address

CI	Document Name
CI-67764 - DSD SC Maintain Highway Address IMPLEMENTED	DSD_SC_Maintain_Highway_Address.doc

When the Edit link associated with a Residence Address with a Type of Highway Address is selected or when the search icon is selected from the Create Address screen where the Address is Residence and the Type is Highway Address, the Maintain Highway Address pop-up displays. When the Verify link is selected, the address validation and standardization service is executed. The address keyed, along with any verified addresses, will display in the Addresses cluster.

The screenshot shows a modal dialog titled "Maintain Highway Address". The window is divided into several sections:

- Details:** Contains a "From:" field set to "11/18/2020" with a calendar icon, and a note "* required field".
- Use as Mailing Address:** Contains a checkbox labeled "Use as Mailing Address: .
- Address:** Contains fields for "Highway Address *", "State *", "City *", and "Zip *". Below these are "Verify" and "Cancel" buttons.
- Addresses:** A table with columns "Action" and "Address", currently empty.

Figure - Maintain Highway Address

Actions/Functions

The following actions are associated with the Maintain Highway Address pop-up:

Actions	Function
Verify	Performs address verification against the address validation and standardization service. The address validation and standardization service does not require the entry of a ZIP code
Cancel	Cancels the action and displays the Create Address screen
Select	Selects and saves the indicated address record, displaying that record on the Create Address screen

Data Elements

The following data elements are associated with the Maintain Highway Address pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
From	The date from which the address will be effective	Date (MM/DD/ YYYY)	Yes	No	Yes
Highway Address					
Highway Address	Highway Address	String	Required for Highway Address Type	No	Yes
Addresses					
City	City of Address	String	Yes	No	Yes
State	State of Address	Drop-down list	Yes	No	Yes
ZIP	ZIP Code of Address	String	Yes	No	Yes
Addresses (Address Validation and Standardization Service Results)					
Address	Displays the address keyed and any address validation and standardization service addresses	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Maintain Other Address

CI	Document Name
CI-67767 - DSD SC Maintain Other Address IMPLEMENTED	DSD_SC_Maintain_Other_Address.doc

When the Edit link associated with a Residence or Mailing Address with a Type of Other Address is selected or when the search icon is selected from the Create Address screen where the Address is Residence or Mailing and the Type is Other Address, the Maintain Other Address pop-up displays. When the Verify link is selected, the address validation and standardization service is executed. The address keyed, along with any verified addresses, will display in the Addresses cluster.

The screenshot shows a modal dialog titled "Maintain Other Address". At the top right are a help (?) icon and a close (X) icon. Below the title is a section labeled "Details" containing a "From:" field set to "11/18/2020" with a calendar icon. A red asterisk indicates it is a required field. The main area is titled "Address" and contains the following form fields:

Establishment Name *	Number *
Pre	Street *
Suffix	Post
Unit Type	Unit Number
City *	State *
Zip *	(Sacramento, California)

Below the form are two buttons: "Verify" and "Cancel".

Below the "Address" section is a cluster titled "Addresses" with a table header "Action" and "Address". The table body is currently empty.

Figure – Maintain Other Address

Actions/Functions

The following actions are associated with the Maintain Other Address pop-up:

Action	Function
Maintain Address	
Verify	Performs address verification against the address validation and standardization service. The address validation and standardization service does not require the entry of a ZIP code
Cancel	Cancels the action and displays the Create Address screen
Select	Selects and saves the indicated address record, displaying that record on the Create Address screen

Data Elements

The following data elements are associated with the Maintain Other Address pop-up:

Field Name	Data Type	Required Indicator	Default Value	Editable Field	
Details					
From	The date from which the address will be effective	Date (MM /DD /YYYY)	Yes	No	Yes
Other Address					
Establishment Name	Name of an establishment where the individual lives (i.e. Shady Hill RV Park, Jackson Hotel, etc.). When used as a mailing address, the C/O will print before the Establishment Name.	String	Yes	No	Yes
Number	Street Number	Number	Yes	No	Yes
Pre	Pre of Street Name	Drop-down list	No	No	Yes
Street	Street Name	String	Yes	No	Yes
Suffix	Suffix of Street Name	Drop-down list	No	No	Yes
Post	Post of Street Name	Drop-down list	No	No	Yes
Unit Type	Unit Type	Drop-down list	No	No	Yes
Unit Number	Unit Number	Number	No	No	Yes
Addresses					
City	City of Address	String	Yes	No	Yes
State	State of Address	Drop-down list	Yes	No	Yes
ZIP	ZIP Code of Address	String	Yes	No	Yes
Addresses (Address Validation and Standardization Service Results)					
Address	Displays the address keyed and any address validation and standardization service addresses	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Address

CI	Document Name
CI-67756 - DSD SC View Address IMPLEMENTED	DSD_SC_View_Address.doc

When the View link associated with a specific address is selected from the Addresses screen, the View Address screen displays. The View Address screen is the same regardless of the Address Type being viewed. Only the data elements specific to the selected address will be indicated.

Figure – View Address

Actions/Functions

The following actions are associated with the View Address screen:

Action	Function
Edit	Displays the applicable Maintain Address screen for the selected record
Close	Closes the screen and displays the Addresses screen

Data Elements

The following data elements are associated with the View Address screen.

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Address	Address Type Residential or Mailing	String	No	No	No
From	From Date of the Address	Date (MM/DD/YYYY)	No	No	No
Type	Type of Residential or Mailing Address	String	No	No	No
To Date	The End Date of the Address	Date (MM/DD/YYYY)	No	No	No
Establishment Name	Name of an establishment where the individual lives (i.e. Shady Hill RV Park, Jackson Hotel, etc.)	String	No	No	No
Number	Street Number	Number	No	No	No

Pre	Pre of Street Name	String	No	No	No
Street	Street Name	String	No	No	No
Suffix	Suffix of Street Name	String	No	No	No
Post	Post of Street Name	String	No	No	No
Unit Type	Unit Type	String	No	No	No
Unit Number	Unit Number	Number	No	No	No
PO Box Number	PO Box	String	No	No	No
Rural Route Address	Rural Route Address	String	No	No	No
Highway Address	Highway Address	String	No	No	No
City	City of Address	String	No	No	No
State	State of Address	String	No	No	No
ZIP	ZIP	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Addresses

CI	Document Name
CI-507545 - DSD SC Email Addresses IMPLEMENTED	DSD_SC_Email_Addresses.docx

When the Email Addresses link is selected from the Person left navigation menu, the Email Address list screen displays. This screen allows the user to view a list of all email addresses associated with the Person including the prior Inactivated email addresses. If an email address is incorrect or must be updated, a new email address must be created which will deactivate the current email address. The county can also deactivate the current email address unless the person is registered as a user on the ESP, in which case the ESP record must be deactivated first.

Figure – Email Address

Actions/Functions

The following actions are associated with the Email Addresses screen:

Action	Function
New	Displays the Create Email Address screen
View	Displays the View Email Address screen
Inactivate	Displays the Inactive Email Address screen (only available for the current and active email address)

Data Elements

The following data elements are associated with the Email Addresses screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Email Address	Email address of the Person	String	No	No	No
Start Date	The date from which the email address will be active	Date (MM/DD/YYYY)	No	No	No
End Date	The date from which the email address was Inactivated. For active emails addresses this field will be blank	Date (MM/DD/YYYY or blank)	No	No	No
Status	Status of the email address (Active or Inactive)	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Email Address

CI	Document Name
CI-507544 - DSD SC Create Email Address IMPLEMENTED	DSD_SC_Create_Email_Address.docx

When the "New" link is selected from the Email Addresses screen, the Create Email Address list pop-up displays. A message indicating the verification code has been confirmed will be displayed for the HelpDesk users only.

The screenshot shows a modal dialog box titled 'Create Email Address'. At the top right are a help icon and a close button. Below the title, a red asterisk indicates that 'Email Address' is a required field. The main area contains a 'Details' section with two input fields: 'Email Address:' and 'Start Date:'. Both fields have red asterisks indicating they are required. The 'Email Address:' field is empty. The 'Start Date:' field has a calendar icon. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

Figure – Create Email Address

This screenshot shows the same 'Create Email Address' dialog box as above, but it includes a message at the top stating 'Verification code has been confirmed. Enter the new Email address below.' The rest of the interface is identical to the first screenshot, with the 'Details' section, 'Email Address:' field, 'Start Date:' field, and 'Save/Cancel' buttons.

Figure – Create Email Address (HD Users)

Actions/Functions

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

Action	Function
Save	Saves the data and return the user to the Email Addresses list screen.
Cancel	Cancels the action and returns the user to the Email Addresses list screen.

Data Elements

The following data elements are associated with the Create Email Address pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Email Address	Email address of the Person	String	Yes	No	Yes
Start Date	The date from which the email address is effective	Date (MM/DD/YYYY)	Yes	Current Date	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Email Address

CI	Document Name
CI-507543 - DSD SC View Email Address IMPLEMENTED	DSD_SC_View_Email_Address.docx

When the "View" link is selected from the Email Addresses screen, the View Email Address screen displays.

Figure – View Email Address

Actions/Functions

The following actions are associated with the View Email Address screen:

Action	Function
Close	Closes the View Email Address screen and returns the user to the Email Addresses list screen.

Data Elements

The following data elements are associated with the View Email Address screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Email Address	Email address of the Person	String	No	No	No
Start Date	The from which the email address is effective	Date (MM/DD/YYYY)	No	No	No
End Date	The date from which the email address was Inactivated. For active emails addresses this field will be blank	Date (MM/DD/YYYY)	No	No	No
Status	Status of the email address (Active or Inactive)	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Inactivate Email Address

CI	Document Name
CI-507546 - DSD SC Inactivate Email Address IMPLEMENTED	DSD_SC_Inactivate_Email_Address.docx

When the "Inactive" link is selected from the Email Address, the Inactivate Email Address pop-up displays unless the Person is enrolled as a User on the IHSS ESP then a notification pop-up displays stating such.

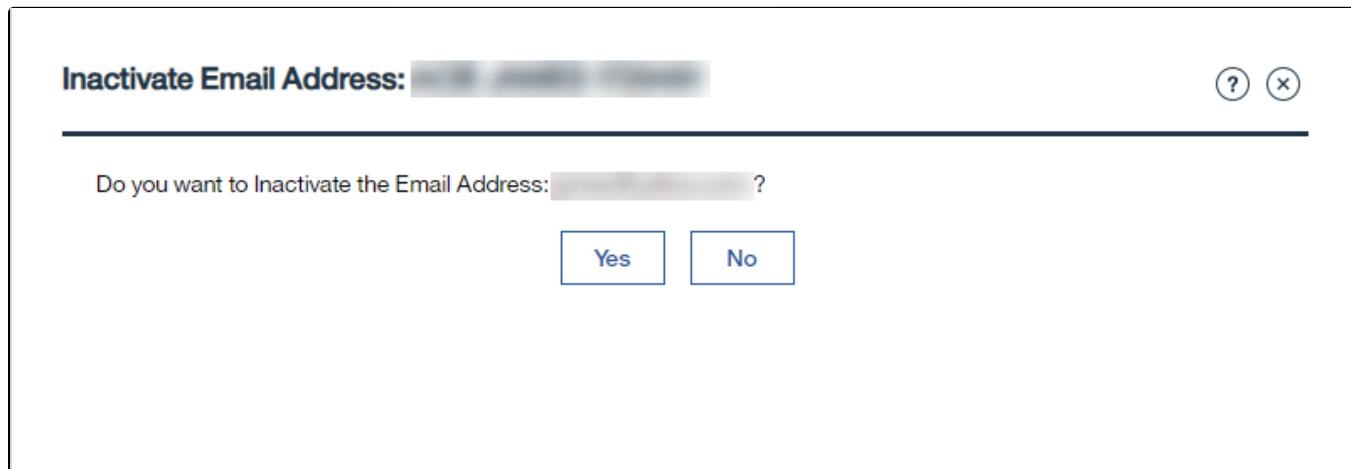


Figure – Inactivate Email Address – Pop-up

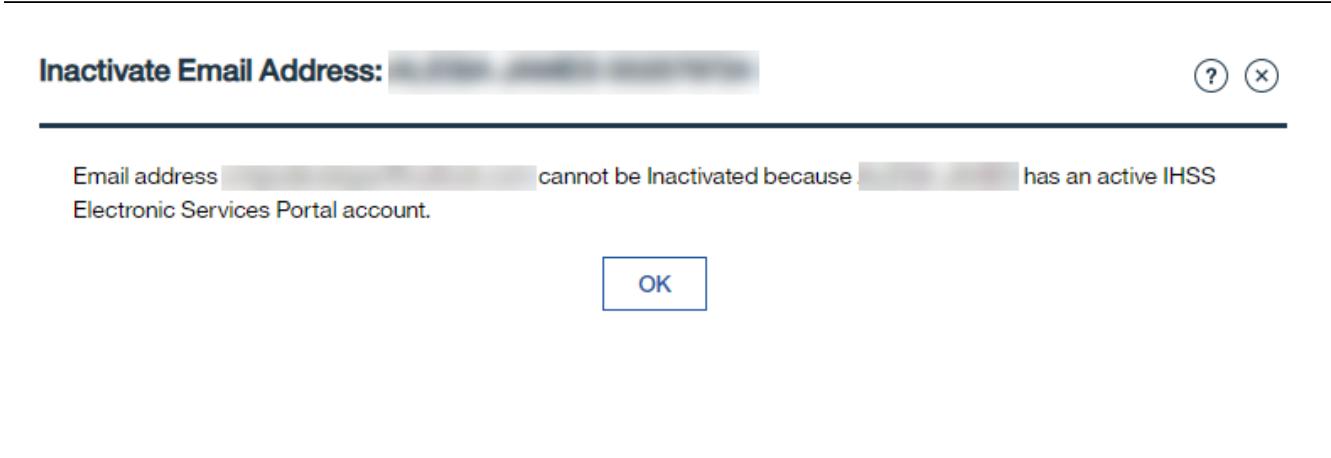


Figure – Inactivate Email Address – Error Message – Pop-up

Actions/Functions

The following actions are associated with the Inactive Email Address pop-up:

Action	Function
Yes	Inactivates the email address and returns to the Email Addresses screen
No	Cancels the action and returns to the Email Addresses screen

Error Message Pop-Up	
OK	Closes the Inactive Email Address – Error Message pop-up and returns to the Email Addresses screen

Data Elements

The following data elements are associated with the Inactivate Email Address pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
<Email Address>	Email address of the Person	String	No	Yes, email address of person	No
<Person Name>	Person name to which the email address belongs Note: This field only displays on the error message pop-up	First Name Last Name	No	Yes, person name	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Alternative IDs

CI	Document Name
CI-67745 - DSD SC Alternative IDs IMPLEMENTED	DSD_SC_Alternative_IDs.doc

When the Alternative IDs tab is selected from Page Navigation on the Person content tab, the Alternative IDs screen displays.

Alternative ID	Type	From	To
[REDACTED]	Social Security Number	02/12/2019	
[REDACTED]	Provider Number	02/12/2019	

Figure – Alternative IDs

Actions/Functions

The following actions are associated with the Alternative IDs screen:

Action	Function
New	Displays the Create Alternative IDs screen
View	Displays the View Alternative ID screen

Data Elements

The following data elements are associated with the Alternative IDs screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Alternative ID	Alternative ID	Number	No	No	No
Type	Type of Alternative ID	String	No	No	No
From	From Date of Alternative ID	Date (MM/DD/YYYY)	No	No	No
To	The end date of the record if an end date exists. Current record this field will be blank.	Date (MM/DD/YYYY)	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Alternative ID

CI	Document Name
CI-67783 - DSD SC Create Alternative ID IMPLEMENTED	DSD_SC_Create_Alternative_ID.doc

When the New link is selected from the Alternative IDs screen the Create Alternative ID pop-up displays.

Figure – Create Alternative ID

Actions/Functions

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

Action	Function
Save	Saves alternative ID information keyed, and displays the Alternative IDs screen
Cancel	Cancels the action displaying Alternative IDs screen
CIN Clearance	The CIN Clearance link displays the Statewide Client Index – CIN Search pop-up

Data Elements

The following data elements are associated with the Create Alternative ID pop-up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Alternative ID	Alternative ID	String	No – Required if Type = Client Index Number	No	Yes

Type	Type of Alternative ID	Drop-down list	Yes	No	Yes
From	From Date of Alternative ID	Date (MM/DD /YYYY)	Yes	Current System Date	No
Blank SSN Reason	Reason the SSN is Blank	Drop-down List	No – Required if Alternative ID is blank and Type is Social Security Number	No	Yes
Comments	Comments (200 characters)	String	No – Required if SSN is being removed	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Alternative ID

CI	Document Name
CI-67777 - DSD SC View Alternative ID IMPLEMENTED	DSD_SC_View_Alternative_ID.doc

When the View link is selected from the Alternative IDs screen the View Alternative ID screen displays.

Figure – View Alternative ID

Actions/Functions

The following actions are associated with the View Alternative ID screen:

Action	Function
Close	Cancels the action and displays the Alternative IDs screen

Data Elements

The following data elements are associated with the View Alternative ID screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Alternative ID:	Alternative ID	Number	No	No	No
Type:	Type of Alternative ID	String	No	No	No
From:	From Date of the Alternative ID	Date (MM/DD/YYYY)	No	No	No
Blank SSN Reason:	Displays the reason the SSN is blank	String	No	No	No
To:	To Date of the Alternative ID if an end date exists	String	No	No	No
Created By:	User that created this record.	String	No	No	No
Comments:	Comments (200 characters)	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Alternative ID

CI	Document Name
 CI-67751 - DSD SC Modify Alternative ID CANCELLED	DSD_SC_Modify_Alternative_ID.doc

Cancelled by ASR Sprint 43 Team 1&2.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Alternative ID History

CI	Document Name
 CI-67774 - DSD SC Alternative ID History CANCELLED	DSD_SC_Alternative_ID_History.doc

Cancelled by ASR Sprint 49 Team 1&2.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Alternative ID History

CI	Document Name
 CI-67780 - DSD SC View Alternative ID History CANCELLED	DSD_SC_View_Alternative_ID_History.doc

Cancelled by ASR Sprint 49 Team 1&2.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Notes (Person)

CI	Document Name
CI-67763 - DSD SC Notes IMPLEMENTED	DSD_SC_Notes.doc

When the Notes action is selected from the Person Page Navigation associated to the Person Home Content Tab, the Notes screen displays.

Figure – Notes (Person)

Actions/Functions

The following actions are associated with the Notes screen:

Action	Function
New	Displays the Create Note pop-up
Print Person Notes Form	Displays the Print Person Notes Form pop-up
View	Displays the View Notes screen
Edit The Edit function does not allow the original note entry to be changed. Rather, the user may add additional comments to an existing note.	Displays the Modify Note pop-up
<Entered By>	Displays the User's Home screen of the individual who keyed the note entry

Data Elements

The following data elements are associated with the Notes screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field

Entered By	The name (first and last) associated with the user who keyed the note	String	No	No	No
Date	Date and time the note was keyed	Date (MM /DD/YYYY)	No	No	No
Text	Content of note. Only users with a sensitivity setting greater than or equal to the note entry will see the actual text of the note. Other users will see asterisks.	String	No	No	No
Sensitivity	Sensitivity assigned to the notes	Number	No	No	No
Priority	Priority assigned to the note	String	No	No	No
Status	Status of note (Active or Inactive)	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Note (Person)

CI	Document Name
CI-67765 - DSD SC Create Note IMPLEMENTED	DSD_SC_Create_Note.doc

When the New link is selected from the Case Notes or Person Notes screen, the Create Note pop-up displays allowing the user to create a new note.

The screenshot shows a modal dialog titled "Create Note". At the top right are a help icon and a close button. Below the title, a red asterisk indicates a required field. The main area is divided into sections: "Details" and "Note Text". The "Details" section contains dropdown menus for "Priority" (set to "Medium") and "Sensitivity" (set to "1"). The "Note Text" section has a label "Text: *". At the bottom are three buttons: "Save", "Save & New", and "Cancel".

Figure – Create Note

Actions/Functions

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

Action	Function
Save	Saves the entry and returns the user to the screen from which they accessed the screen (Case Notes or Person Notes)
Save & New	Saves the note and displays a new Create Note pop-up
Cancel	Cancels the action and returns the user to the screen from which they accessed the screen (Case Notes or Person Notes)

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Priority	Priority of Notes	Drop-down list	No	Medium	Yes
Sensitivity	Sensitivity of Notes - Sensitivity is based upon the user's "sensitivity," a setting assigned in User Set-up process. Sensitivity values range from 1 (Low) to 5 (Highest). A user may only assign Sensitivity equal to or less than their user sensitivity. A user may only view notes with a sensitivity which is less than or equal to their user sensitivity.	Drop-down list	No	1	Yes
Note Text					
Text	Text of Notes (30,720 characters)	String	Yes	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Note

CI	Document Name
CI-67752 - DSD SC View Note IMPLEMENTED	DSD_SC_View_Note.doc

When the View link is selected from the Case Notes or Person Notes screen, the View Note screen displays.

The screenshot shows the 'View Note' screen of the CMPIS II system. At the top, there's a header bar with the system name and navigation links. Below the header, the main content area displays a note entry. The note has a sensitivity level of 1 and was created on 07/31/2020 at 10:09. The note text area is mostly blank. At the bottom of the screen, there are three buttons: 'Edit...', 'Inactivate...', and 'Close'.

Figure – View Notes

Actions/Functions

The following actions are associated with the View Note screen:

Action	Function
Edit	Displays the Modify Note pop-up
Inactivate	Displays the Inactivate Note confirmation pop-up
Close	Closes the screen and returns to the screen from which they accessed the screen (Case Notes or Person Notes)
Entered By	Displays the User's Home screen of the individual who keyed the note entry

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Priority	Priority of note	String	No	No	No
Sensitivity	Sensitivity of note	Number	No	No	No
Entered By	The name (First and Last) of the user who keyed the note	String	No	No	No
Creation Date	Creation Date of the note	Date (MM/DD/YYYY HH:MM)	No	No	No
Status	Status of the note (Active or Cancelled)	String	No	No	No
Note History					
Note History	Displays all entries associated with the note	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Modify Note

CI	Document Name
CI-67748 - DSD SC Modify Note IMPLEMENTED	DSD_SC_Modify_Note.doc

When the Edit link associated to a specific note is selected from the Case Notes, Person Notes, or View Note screen, the Modify Note pop-up displays. The original note displays in the Note History cluster. This original note entry may not be modified, but additional notes may be added in the Text box in the Note Text cluster.

The screenshot shows a 'Modify Note' dialog box. At the top right are a question mark icon and a close button. Below them is a note history section with a red asterisk indicating it's a required field. The history shows a note from 'Entered By:' on '02/14/2018 15:47' with priority 'High' and sensitivity '1'. The main area contains a large text input field labeled 'Text: *' which is currently empty. Below this is a note history section for a previous entry on '02/14/2018 15:47' with the same details. At the bottom right are 'Save' and 'Cancel' buttons.

Figure – Modify Note

Actions/Functions

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

Action	Function
Screen Body	
Save	Saves the entered data and returns the user to the screen from which they accessed the screen (Case Notes, Person Notes, or View Note)
Cancel	Cancels the action returns the user to the screen from which they accessed the screen (Case Notes, Person Notes, or View Note)
Details	
Entered By	Displays the User's Home screen of the individual who keyed the note entry

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details					
Priority	Priority of note	Drop-down list	No	No	Yes
Sensitivity	Sensitivity of note	Drop-down list	No	No	Yes
Creation Date	Creation Date of note	Date (MM/DD/YYYY HH:MM)	No	No	Yes
Note Text					
Text	Text of notes (30,720 characters)	String	Yes	No	Yes
Note History					
Note History	History of notes	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Inactivate Note

CI	Document Name
CI-67782 - DSD SC Inactivate Note IMPLEMENTED	DSD_SC_Inactivate_Note.doc

When the Inactivate link is selected from the View Note screen, the Inactivate Note confirmation pop-up displays.

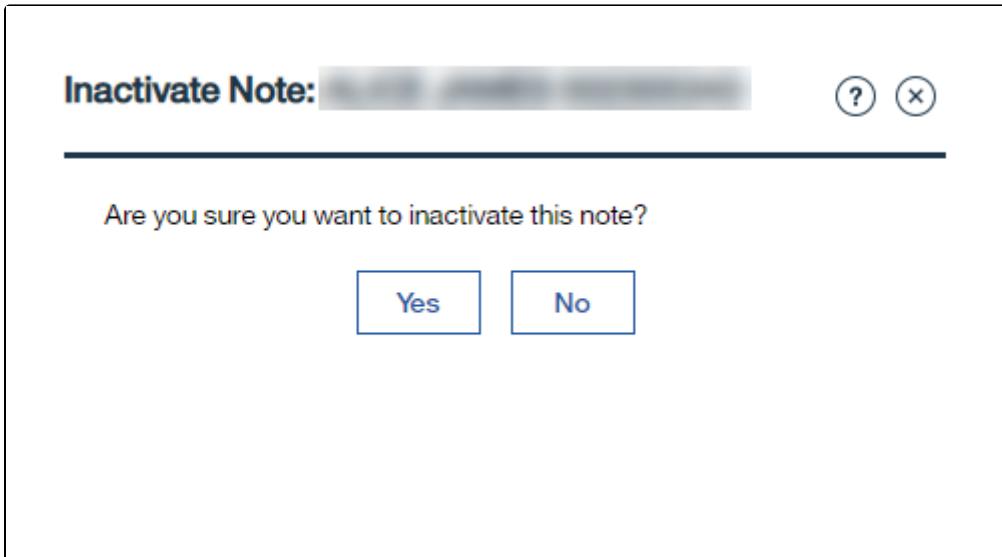


Figure – Inactivate Note

Actions/Functions

The following actions are associated with the Inactivate Note pop-up:

Action	Function
Yes	Changes the status of the note to Inactive and no further modifications can be made to the note. Returns the user to the Notes screen
No	Cancels the Inactivate Note action and returns the user to the View Note screen

Data Elements

There are no data elements associated to the Inactivate Note pop-up.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Merge Duplicate SSN

CI	Document Name
CI-446456 - DSD SC Merge Duplicate SSN IMPLEMENTED	DSD_SC_Merge_Duplicate_SSN.doc

When the user selects the Merge Duplicate SSN link from My Shortcuts on the My Workspace screen the Merge Duplicate SSN screen displays. This screen allows entry of up to 15 Duplicate records. Users with a security role other than "CaseMgmtProvMgmt", "CaseMgmtProvMgmtPayroll" or "CDSSProgramMgmt" will be prohibited from taking action on this screen.

Figure - Merge Duplicate SSN

Actions/Functions

The following actions are associated with the Merge Duplicate SSN screen:

Action	Function
Verify	Verifies the data entered does not contain errors. If errors exist the associated error message will be displayed in the Error column associated with the record which produced the error. If there are no errors when the data is verified, the Verify link will change to Save. When the Save Link is selected the screen is saved, the actions are processed and the user is returned to the My Workspace screen.

Data Elements

The following data elements are specific to the Merge Duplicate SSN screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Social Security Number	The Social Security Number to be associated with all indicated records	String	Yes	None	Yes
Master	The CMIPS case or Provider record which should be the Master record. Screen allows the entry of one (1) Master record.	String	Yes	None	Yes

Duplicate	The CMIPS case or Provider record(s) which should be indicated as a Duplicate SSN record. Screen allows for the entry of up to 15 Duplicate records.	String	Yes, at least one	None	Yes
Error Message	When the Duplicate record details does not exactly match to the Master record the error displays indicating the needed resolution	String	No, will only display if Duplicate record details does not pass verification edits.	None	No
Make Master	A user will be able to check the check box only when the informational message, "[Case Number*]" is currently a Master record. If you are sure you want the currently indicated case [Master Record Case] to be indicated as the Master Record, select the "Make Master" checkbox." displays.	Checkbx	No	None	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/My Cases

CI	Document Name
CI-451610 - DSD SC OS My Cases IMPLEMENTED	DSD_SC_OS_My_Cases.docx

When the My Cases Navigation Tab is selected from the top of the Cúram application, the My Cases screen displays. The My Cases screen displays a list of cases currently assigned to the user.

The screenshot shows the 'CMIPS II Case Management Information Payroll System II' interface. The title bar includes 'Case Number' and a search icon. The main area is titled 'By Users'. A table lists 14 cases, each with columns for ID, Language, Date Of Birth, Companion, Assigned, Reassessment Date, and Funding Source. The 'Assigned' column shows 'No' for most cases, except for one which has a red '12/31/2021' date. The 'Funding Source' column includes entries like '2N - IHSS-R', '2K - CFCO', '2M - PCSP', and '2K - CFCO'.

Figure – My Cases

Actions/Functions

The following actions are associated with the My Cases screen:

Action	Function
Case Number	Displays Case Home

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Recipient	Name of Recipient	String	No	None	No
Status	Case status – "In-Progress" will display on cases to which the user is the "Assigned Worker" on an "In-Progress" Inter-County Transfer case.	String	No	None	No
City	The residential city of the Recipient	String	No	None	No
Zip	ZIP code of Recipient. Note: Displays only the first 5 characters.	String	No	None	No
Language	Language of Recipient	String	No	None	No

Date of Birth	Date of birth of the Recipient	String (MM /DD/YYYY)	No	None	No
Companion	Indicates if a companion case has been added to this case (Y/N)	String	No	None	No
Assigned	Date of case when assigned to a worker	String (MM /DD/YYYY)	No	None	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	String (MM /DD/YYYY)	No	None	No
Funding Source	The current Funding Source for the case. Note: Terminated and ICT-in-progress cases will not display	String	No	None	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Content Tab Warning

CI	Document Name
 CI-740806 - DSD SC Open Tab Warning IMPLEMENTED	DSD_SC_Open_Tab_Warning.docx

When the limited number of content tabs have been opened in a user's workspace, the Content Tab Working pop-up displays. The user will need to close one of the open tabs to allow another tab to be opened.

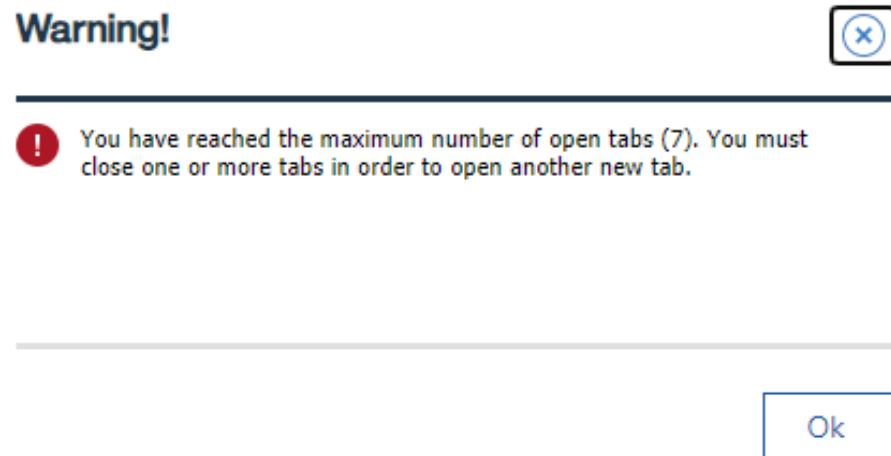


Figure – Open Tab Warning

Actions/Functions

The following actions are associated with the Content Tab Working pop-up:

Action	Function
OK	Returns the user to the current Content Tab

Data Elements

There are no data elements associated with the Content Tab Warning pop-up.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Content Tab Failure

CI	Document Name
 CI-740805 - DSD SC Open Tab Failure IMPLEMENTED	DSD_SC_Open_Tab_Failure.docx

When an attempt is made to open a sixth Content Tab for a user's workspace the system displays the following failure message.

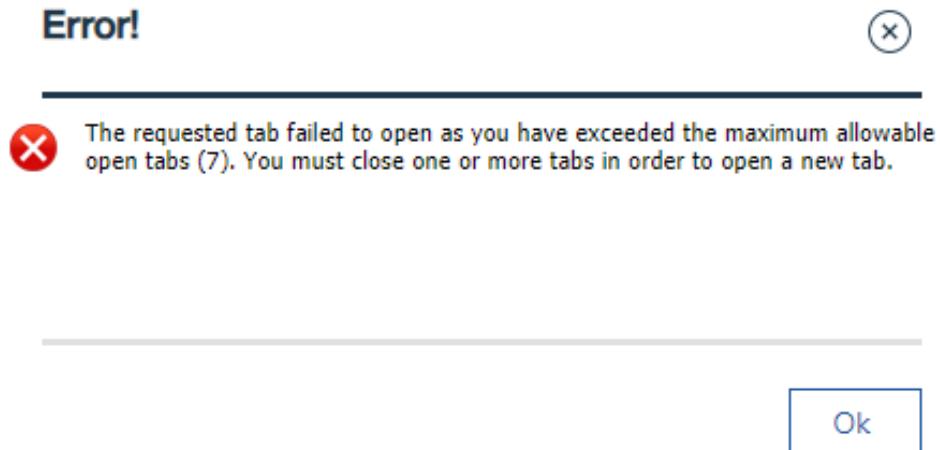


Figure – Open Tab Failure

Actions/Functions

The following actions are associated with the Content Tab Failure pop-up:

Action	Function
OK	Returns the user to the current Content Tab

Data Elements

There are no data elements associated with the Content Tab Failure pop-up.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Owner User Home Screen

Case Owner User Home Screen

CI	Document Name
CI-813442 - DSD SC Case Owner User Home Screen [IMPLEMENTED]	DSD_SC_Case_Owner_User_Home_Screen.docx

When the Case Owner Name link for a specific case is selected the Case Owner User Home pop up displays allowing a user to view a Case Owners information.

The Case Owner User Home pop-up is also accessible on the Recipient and Provider Message Center screen by selecting the linked name in the Entered By column for the respective message or within the View Message pop-up screen.

The screenshot shows a modal dialog box titled "User Home: [REDACTED]" with a close button. The main area is titled "Contact Details" and contains the following fields:

User Name:	[REDACTED]	Worker Number:	[REDACTED]
Location:	[REDACTED]	Unit Name:	[REDACTED]
Business Phone:	[REDACTED]	Business Mobile:	[REDACTED]
Business Phone Extension:	[REDACTED]	Business Pager:	[REDACTED]
Business Fax:	[REDACTED]	Business Email:	[REDACTED]
Primary Alternate Language:	[REDACTED]	Secondary Alternate Language:	[REDACTED]
Tasks Currently Redirected To:	Task Redirection...	Office Phone:	[REDACTED]

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

Figure – Case Owner User Home

Actions/Functions

The following actions are associated with the Case Owner User Home pop up:

Actions	Function
Close	Click Close to close the Case Owner User Home pop up.

<Task Currently Redirected To>	Click "Task Redirection" to redirect this user's tasks to another user. This link will be available to County Security Administrators and Supervisors. This link will display the Task Redirection screen.
--------------------------------	--

Data Elements

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

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
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
Unit Name	User's organization unit name	String	No	No	No
Business Mobile	User's business mobile number.	Number	No	No	No
Business Phone	User's business phone number.	Number	No	No	No
Business Pager	User's business pager number.	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
Primary Alternate Language	User's primary alternate language.	String	No	No	No
Secondary Alternate Language	User's secondary alternate language.	String	No	No	No
Office Phone	County or district office's main phone number.	Number	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/State Hearing Search

CI	Document Name
CI-67779 - DSD SC State Hearing Search IMPLEMENTED	DSD_SC_State_Hearing_Search.doc

When the Find a State Hearing Case link is selected from the My Shortcuts section of the My Workspace screen the State Hearing Search screen displays.

The screenshot shows the CMIPS II Case Management Information Payroll System II interface. At the top, there's a navigation bar with 'CMIPS II Case Management Information Payroll System II', 'Case Number' search, 'Welcome' dropdown, and a user icon. Below the navigation is a header with 'Inbox' and 'Caseload By Users'. The main area is titled 'State Hearing Search' and contains the following fields:

- State Hearing Scheduled:** A dropdown menu showing 'State Hearing Scheduled'.
- County:** A dropdown menu showing 'Yolo'.
- From Date:** A date input field with a calendar icon.
- To Date:** A date input field with a calendar icon.
- Recipient Name:** A text input field.
- State Hearing Status:** A dropdown menu.

At the bottom of the search form are 'Search' and 'Reset' buttons.

Figure – State Hearing Search

Actions/Functions

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

Actions	Function
Search	Performs search on search criteria
Reset	Resets all fields to their default values
<Case Number>	When selected, the Case Home screen displays

Data Elements – Search Criteria

The following data elements are associated with State Hearing Search. The State Hearing Search is limited to a six-month period. If no "To Date" is indicated, the search is based upon the State Hearing Status six months from the "From Date". The State Hearing search is limited to the county to which the user is assigned. If a user has statewide access, a county must be selected.

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
State Hearing Status	The State Hearing Status to be included in the search	Drop-down list	Yes	State Hearing Scheduled	Yes
County	Search State Hearing by County	Drop-down list	Yes	User's County	No, only for user's with statewide access have the ability to select a county
Hearing Request From Date	The State Hearing Request Date from which the search will begin	Date (MM/DD /YYYY)	Yes	No	Yes
Hearing Request To Date	The State Hearing Request Date to which the search will extend	Date (MM/DD /YYYY)	No	No	Yes

Data Elements – Search Results

The following data elements are associated with State Hearing Search Results:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Case Number	The Recipient case number. If selected displays the Case Home	Number	No	No	No
Recipient Name	The Recipient case name. If selected displays the Person Home	String	No	No	No
State Hearing Status	The status of the State Hearing. If selected displays the State Hearings screen.	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Management Header - Case Perspective



Updated Share of Cost functionality has been implemented in the CMIPS application; however, it is not yet enabled. The 'SOC Hours' and 'Available Hours' fields are not accessible to users. They will be enabled in a future release.

CI
CI-822909 - DSD SC CM Header - Case Perspective IMPLEMENTED

The Case Management Header - Case Perspective is a collapsible section that displays at the top of every non-popup screen in Case Management that is accessed from the Case Perspective. The header displays beneath the user's open tabs, but above the content tabs.

Figure – Case Management Header - Case Perspective

Actions/Functions

There are no actions/functions associated with the Case Management Header - Case Perspective.

Data Elements

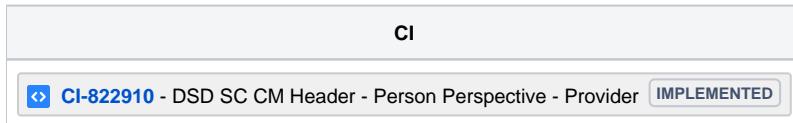
The following data elements are associated with Case Management Header - Case Perspective:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	The Recipient name associated with the case record (First Name Last Name).	String	No	N/A	No
Authorization Start Date	The Authorization Start Date of the most recent active evidence on the case (MM/DD/YYYY).	Date	No	N/A	No
Residence Address	The residence address associated with the Recipient on the case record.	String	No	N/A	No
Auth to Purchase after Adjusted Hours	The monthly authorized hours on the case for the most recent active evidence on the case.	Time (HH:MM)	No	00:00	No
Gender	The gender associated with the Recipient on the case.	String	No	N/A	No
Weekly Authorized Hours	The weekly authorized hours on the case for the most recent active evidence on the case.	Time (HH:MM)	No	00:00	No
Date of Birth/Death	The date of birth and if applicable, the date of death of the Recipient on the case. Format: Born <MM/DD/YYYY> - Died <MM/DD/YYYY>	String	No	N/A	No
Age	The age of the Recipient on the case in years. Note: If the person is deceased, the age reflects the age at death.	Numeric	No	N/A	No
Monthly OT Max	The monthly overtime maximum on the case for the most recent active evidence on the case.	Time (HH:MM)	No	00:00	No
Phone Number	The primary phone number associated with the Recipient on the case.	String	No	Not Recorded	No
Email Address	The email address associated with the Recipient on the case.	String	No	Not Recorded	No
IHSS Paid Hours	The number of hours paid on the case for the current month based upon the date the screen is viewed.	Time (HH:MM)	No	00:00	No

SOC Hours	The number of hours that the recipient is expected to pay providers in the current month as part of their share of cost.	Time (HH:MM)	No	00:00	No
Available Hours	The number of hours the IHSS program is expected to pay providers. These are the adjusted authorized IHSS hours after the SOC Hours are deducted.	Time (HH:MM)	No	See Note	No

Note: If there are 00:00 SOC hours in the current month then Available Hours = Auth To Purchase After Adjusted Hours.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Management Header - Person Perspective - Provider



The Case Management Header - Person Perspective - Provider is a collapsible section that displays at the top of every non-popup screen in Case Management that is accessed from the Person Perspective where the person is a Provider. The header displays beneath the user's open tabs, but above the content tabs.

Figure – Case Management Header - Person Perspective - Provider

Actions/Functions

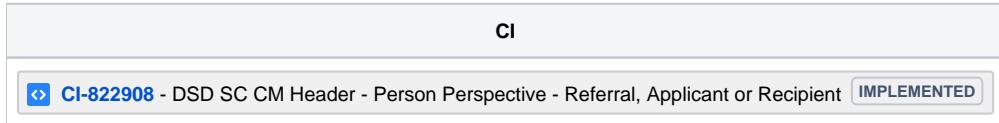
There are no actions/functions associated with the Case Management Header - Person Perspective - Provider.

Data Elements

The following data elements are associated with Case Management Header - Person Perspective - Provider:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	The name associated with the person record (First Name Last Name)	String	No	N/A	No
Weekly Maximum	The Weekly Maximum hours	Time (HH: MM)	No	N/A	No
Residence Address	The residence address associated with the person record	String	No	N/A	No
Number of Active Cases	The number of active cases the provider serves.	Numeric	No	N/A	No
Gender	The gender associated with the person record	String	No	N/A	No
Weekly Travel Hours	If applicable, the number of Travel Hours associated to the provider.	Time (HH: MM)	No	00:00	No
Date of Birth	The date (MM/DD/YYYY format) of birth of the person.	String	No	N/A	No
Age	The age of the person in years.	Numeric	No	N/A	No
Eligible	Indicates whether the provider is eligible to serve as an IHSS or WPCS provider.	String	No	N/A	No
Phone Number	The primary phone number associated with the person record	String	No	Not Recorded	No
Enrollment Effective Date	The effective date of the provider enrollment. (MM/DD/YYYY)	Date	No	N/A	No
Email Address	The email address associated with the person record	String	No	Not Recorded	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Case Management Header - Person Perspective - Referral, Applicant or Recipient



The Case Management Header - Person Perspective - Referral, Applicant or Recipient is a collapsible section that displays at the top of every non-popup screen in Case Management that is accessed from the Person Perspective where the person is a Referral, Applicant or Recipient. The header displays beneath the user's open tabs, but above the content tabs.



Figure – Case Management Header - Person Perspective - Referral, Applicant or Recipient

Actions/Functions

There are no actions/functions associated with the Case Management Header - Person Perspective - Referral, Applicant or Recipient.

Data Elements

The following data elements are associated with Case Management Header - Person Perspective - Referral, Applicant or Recipient:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Name	The name associated with the person record (First Name Last Name).	String	No	N/A	No
Authorization Start Date	The Authorization Start Date of the most recent active evidence on the case (MM/DD/YYYY).	Date	No	N/A	No
Residence Address	The residence address associated with the person record.	String	No	N/A	No
Auth to Purchase after Adjusted Hours	The monthly authorized hours on the case for the most recent active evidence on the case.	Time (HH: MM)	No	00:00	No
Gender	The gender associated with the person record.	String	No	N/A	No
Weekly Authorized Hours	The weekly authorized hours on the case for the most recent active evidence on the case.	Time (HH: MM)	No	00:00	No
Date of Birth/Death	The date of birth and if applicable, the date of death. Format: Born <MM/DD/YYYY> - Died <MM/DD/YYYY>	String	No	N/A	No
Age	The person's age in years. Note: If the person is deceased, the age reflects the age at death.	Numeric	No	N/A	No
Monthly OT Max	The monthly overtime maximum on the case for the most recent active evidence on the case.	Time (HH: MM)	No	00:00	No
Phone Number	The primary phone number associated with the person record.	String	No	Not Recorded	No
Email Address	The email address associated with the person record.	String	No	Not Recorded	No
IHSS Paid Hours	The number of hours paid on the case for the current month based upon the date the screen is viewed.	Time (HH: MM)	No	00:00	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Message Center



When the Message Center link is selected from under Case Home or Provider Content tabs the Message Center screen displays.

This screenshot shows a list of messages with a 'Next' button at the top. The table has five columns: Date, Subject, High Priority, Status, and Read Receipt.

Date	Subject	High Priority	Status	Read Receipt
18:06	Reminder to complete and return form	No	Inactive	Read
18:06	Reminder to complete and return form	No	Active	Read
18:06	Reminder to complete and return form	No	Active	Read
18:06	Reminder to complete and return form	No	Inactive	Read
18:05	Upcoming IHSS Assessment	No	Active	Read
18:05	Reminder to complete and return form	No	Active	Read
18:05	Reminder to complete and return form	No	Active	Read
18:05	Reminder to complete and return form	No	Inactive	Read
18:05	Reminder to complete and return form	No	Active	Unread
18:05	Reminder to complete and return form	No	Active	Unread
18:04	Reminder to complete and return form	No	Active	Unread
18:04	Reminder to complete and return form	No	Active	Unread
18:04	Reminder to complete and return form	No	Active	Unread
18:04	Reminder to complete and return form	No	Active	Unread
18:03	Reminder to complete and return form	No	Active	Unread
18:03	Reminder to complete and return form	No	Active	Unread
18:03	Reminder to complete and return form	No	Active	Unread

Figure – Message Center with Pagination

This screenshot shows a list of messages with 'Previous' and 'Next' buttons at the top. The table has five columns: Date, Subject, High Priority, Status, and Read Receipt.

Date	Subject	High Priority	Status	Read Receipt
22 12:41	Upcoming IHSS Assessment	No	Active	Unread
22 12:41	Upcoming IHSS Assessment	No	Active	Unread
23 13:51	Reminder to complete and return form	No	Active	Unread
23 13:22	Reminder to complete and return form	Yes	Active	Unread
23 10:45	Reminder to complete and return form	Yes	Active	Unread
23 10:45	Upcoming IHSS Assessment	No	Active	Unread

Figure – Message Center with Pagination (Page 2)

Actions/Functions

The following actions are associated with the Message Center screen:

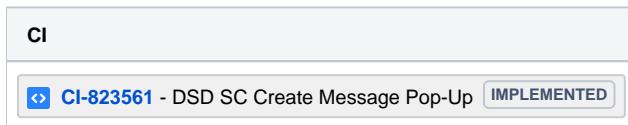
Actions	Function
New...	Displays the Create Message Pop-up screen.
Next	Displays the next page of messages.
Previous	Displays the previous page of messages.
View	Displays the View Message screen and an inactivate button will deactivate the message.
Entered By	Displays the User Home screen for the user that sent the message.

Data Elements

The following data elements are associated with the Message Center screen:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Creation Date	The date and time the message was sent to the user. Note: Default sorted by newest to oldest message.	Date and Time Integer (MM/DD/YYYY) (HH:MM)	No	No	No
Subject	The name of the pre canned message sent to the user.	String	No	No	No
High Priority	The priority of the message.	String	No	No	No
Status	The status of the record, either active or inactive.	String	No	No	No
Read Receipt	The read receipt of the message in ESP.	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Create Message Pop-Up



When the New button is selected from the Message Center screen, the Create Message Pop-Up displays.

A screenshot of the 'Create Message Pop-Up' window. It includes fields for 'Subject' (with a required asterisk), 'Form Name', 'Action Date' (with a calendar icon), 'High Priority' (checkbox), and 'Body'. There are also 'Preview' and 'Cancel' buttons at the bottom. The window has a header with a question mark and close buttons, and a note at the top right indicating '* required field'.

Figure – Create Message Pop-Up

Message: [REDACTED]

tails

Subject: Reminder to complete and return form	Form Name: SOC 332 - Recipient/Employer Responsibility Checklist
High Priority: Yes	Action Date: 01/30/2023

ssage Preview

Subject: Reminder to complete and return form
Body: Your IHSS county office has requested that you submit a completed SOC 332 - Recipient/Employer Responsibility Checklist for processing by 01/30/2023. As of the date of this notice, our records show you have not yet returned the requested form.
Please fill out, sign, and return the form to your IHSS county office. If you believe you have already submitted this form, please call your IHSS county office to ensure that the form has been received.
Submitting this form after 01/30/2023 may result in a delay. If you have any questions, please contact your IHSS county office.

[Send](#) [Send & New](#) [Cancel](#)

Figure - Create Message Pop-Up (Populated)

Actions/Functions

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

Hyperlink	Function
Preview	Populates the selected message in the Message Preview Cluster for review.
Send	Displays after the preview button has been selected. Sends the message and navigates back to the Message Center Screen. Note: If the Provider/Recipient is not registered in ESP, the message is not sent and an error message is displayed at the top of the Create Message pop-up.
Send & New	Displays after the preview button has been selected. Sends the message and opens a new Create Message pop-up. Note: If the Provider/Recipient is not registered in ESP, the message is not sent and an error message is displayed at the top of the Create Message pop-up.
Cancel	Closes the pop-up, discards the message draft, and navigates back to the Message Center Screen.

Data Elements

The following data elements are specific to the Create Message Pop-Up:

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details Cluster					
Subject	Allows the user to select the subject type of the new message Note: After the preview button is selected, the selected subject displays as static text only.	Dropdown	Yes	No	Yes
High Priority	Allows the user to indicate the message is High Priority	Checkbox	No	Low	No
Form Name	Allows the user to select a form name	Dropdown	No	No	Yes
Action Date	Allows the user to input an action date	Date (MM/DD/YYYY)	No	No	Yes

Message Preview Cluster					
Subject	Displays the subject selected from the dropdown after the Preview button is selected.	String	No	No	No
Body	Displays message content after the Preview button is selected.	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/View Message



When the View link is selected from the Message Center screen, the View Message screen displays.

A screenshot of a "View Message" window. At the top, there's a header with a question mark icon. Below it, message details are listed: "Entered By: Joes001", "Creation Date: 11/07/2022 10:45", "High Priority: No", "Read Date:", "Status: Active". Under "Message Details", the subject is "Upcoming IHSS Assessment" and the body contains a reminder about an upcoming assessment on 12/07/2022 at 00:00:00. It also includes a note about address changes and interpreter requests. A "Close" button is at the bottom right.

Figure – View Message

Actions/Functions

The following actions are associated with the View Message screen:

Hyperlink	Function
Entered By	Displays the Name of the user who created the message. Clicking the Name opens the Case Owner User Home screen.
Close	Closes the pop-up and navigates back to the Message Center Screen.

Data Elements

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

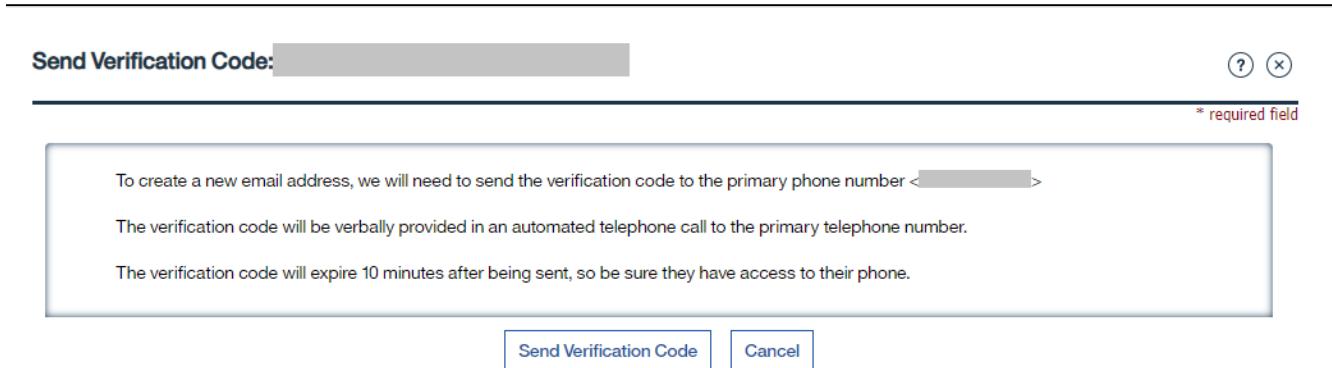
Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Details Cluster					
Creation Date	Displays the date and time the message was created by the user.	Date/Time (MM/DD/YYYY HH:MM)	No	No	No
High Priority	Displays the high priority selection, either Yes or No, entered by the user who created the message.	String	No	No	No

Status	Displays the status of the message, either Active or Inactive.	String	No	No	No
Read Date	Displays the date and time the Recipient or Provider read the message.	Date/Time (MM/DD/YYYY HH:MM)	No	No	No
Message Details Cluster					
Subject	Displays the subject selected on the Create Message Pop-Up screen.	String	No	No	No
Body	Displays message associated to the selected subject.	String	No	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Address Send Verification Code

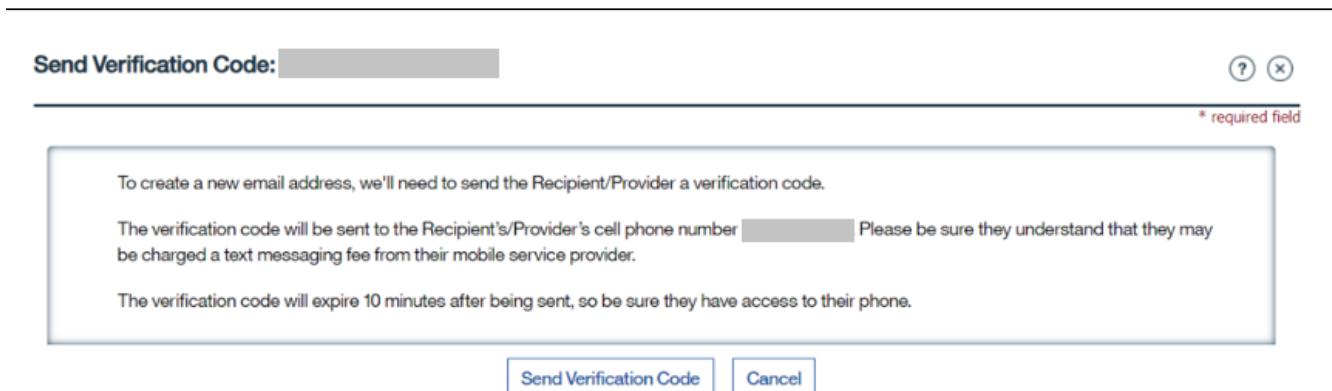
CI	Document Name
CI-823990 - DSD SC Email Address Send Verification Code IMPLEMENTED	DSD_SC_Email_Address_Send_Verification_Code.docx

When the "New" link is selected from the Email Addresses screen, the Send Verification Code pop-up displays. The verbiage displayed on the Send Verification Code pop-up depends on the contact information on file for that Provider or Recipient. This screen is available only to the Helpdesk users.



The dialog box has a title bar with 'Send Verification Code:' and two buttons on the right: a question mark icon and a close (X) icon. Below the title bar is a red asterisk followed by the text 'required field'. The main content area contains three lines of text: 'To create a new email address, we will need to send the verification code to the primary phone number < [REDACTED] >', 'The verification code will be verbally provided in an automated telephone call to the primary telephone number.', and 'The verification code will expire 10 minutes after being sent, so be sure they have access to their phone.' At the bottom are two buttons: 'Send Verification Code' and 'Cancel'.

Figure – Send Verification Code - (Provider/Recipient Has Primary Phone Only)



The dialog box has a title bar with 'Send Verification Code:' and two buttons on the right: a question mark icon and a close (X) icon. Below the title bar is a red asterisk followed by the text 'required field'. The main content area contains three lines of text: 'To create a new email address, we'll need to send the Recipient/Provider a verification code.', 'The verification code will be sent to the Recipient's/Provider's cell phone number [REDACTED]. Please be sure they understand that they may be charged a text messaging fee from their mobile service provider.', and 'The verification code will expire 10 minutes after being sent, so be sure they have access to their phone.' At the bottom are two buttons: 'Send Verification Code' and 'Cancel'.

Figure – Send Verification Code - (Provider/Recipient Has Cell Phone Only)

Send Verification Code: (?) (X)

* required field

To create a new email address, we'll need to send the Recipient/Provider a verification code.

If you select "Text me," the verification code will be sent to the Recipient's/Provider's cell phone number. Please be sure they understand that they may be charged a text messaging fee from their mobile service provider.

If you select "Call me," the verification code will be verbally provided to the Recipient/Provider in an automated telephone call to their primary telephone number.

The verification code will expire 10 minutes after being sent, so be sure they have access to their phone.

Select your verification option: Call me at: ▼

Send Verification Code
Cancel

Figure – Send Verification Code - (Provider/Recipient Has Primary & Cell Phone)

Actions/Functions

The following actions are associated with the Send Verification Code pop-up:

Action	Function
Send Verification Code	Sends a 6-digit verification code to the Provider's/Recipient's phone and takes the user to Enter Verification Code screen.
Cancel	Cancels the action and returns the user to the Email Addresses screen.

Data Elements

The following data element is associated with the Send Verification Code pop-up.

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Select your verification option	Drop down to select the phone number the Provider or Recipient wants the verification code sent to. The "Call me at" option will be selected by default.	Integer	Yes	No	No

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Address Enter Verification Code

CI	Document Name
CI-823988 - DSD SC Email Address Enter Verification Code IMPLEMENTED	DSD_SC_Email_Address_Enter_Verification_Code.docx

When the Send Verification Code button is selected on Send Verification Code pop-up, Enter Verification pop-up displays. The verbiage displayed on the Enter Verification Code pop-up depends on how the verification code was sent to the Provider or Recipient, i.e.. via a call or text message. This screen is available only to the Helpdesk users.

The screenshot shows a user interface for entering a verification code. At the top, there is a header with the text "Verification Code:" followed by a large input field. To the right of the input field are two small circular icons with question marks and crosses. Below the input field, a red asterisk indicates it is a required field. A descriptive message follows: "We sent a voice message with a verification code to the Recipient's/Provider's primary phone number. Please enter the code below." Another message states: "The code expires after 10 minutes. If they did not receive a code or if it expired, select "Resend Code" to receive a new code." At the bottom of the form are three buttons: "Verify", "Resend Code", and "Could Not Verify".

Figure – Enter Verification Code - (Verification Code Was Sent via Call (voice message))

The screenshot shows a user interface for entering a verification code. At the top, there is a header with the text "Verification Code:" followed by a large input field. To the right of the input field are two small circular icons with question marks and crosses. Below the input field, a red asterisk indicates it is a required field. A descriptive message follows: "We sent a text message with a verification code to the Recipient's/Provider's cell phone number. Please enter the code below." Another message states: "The code expires after 10 minutes. If they did not receive a code or if it expired, select "Resend Code" to receive a new code." At the bottom of the form are three buttons: "Verify", "Resend Code", and "Could Not Verify".

Figure – Enter Verification Code - (Verification Code Was Sent via Text Message)

Actions/Functions

The following actions are associated with the Enter Verification Code pop-up:

Action	Function
Verify	Verifies the verification code entered by the user and if successful, takes the user to Create Email Address screen.

Resend Code	Sends a new verification code to the user via text or call and displays the following text: "Verification code resent. Enter the code below. If the Recipient/Provider didn't receive a code or if it expired, select "Resend Code" to send a new one."
Could Not Verify	Cancels the action and returns the user to the Email Addresses screen and creates a Person Note and a Case Note. Case Note: "(High priority- Sensitivity- 1) On <mm/dd/yyyy hh:mm:ss> Recipient email address change requested. Service Desk unable to identify caller via verification code. As a result, email address not updated." Person Note: "(High Priority- Sensitivity- 1) On <mm/dd/yyyy hh:mm:ss> Provider email address change requested. Service Desk unable to identify caller via verification code. As a result, email address not updated."

Data Elements

The following data element is associated with the Enter Verification Code pop-up.

Field Name	Help	Data Type	Required Indicator	Default Value	Editable Field
Verification Code	This field allows the user to enter the 6-digit verification code sent to the Provider/Recipient.	Integer	Yes	No	Yes

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Email Address No Phone Numbers

CI	Document Name
CI-823989 - DSD SC Email Address No Phone Numbers IMPLEMENTED	DSD_SC_Email_Address_No_Phone_Numbers.docx

When the "New" link is selected from the Email Addresses screen, the No Phone Numbers pop-up displays. This screen is displayed where there is no phone number on file for that Provider or Recipient or if the phone number has been active for less than 24 hours. This screen is available only to the Helpdesk users.

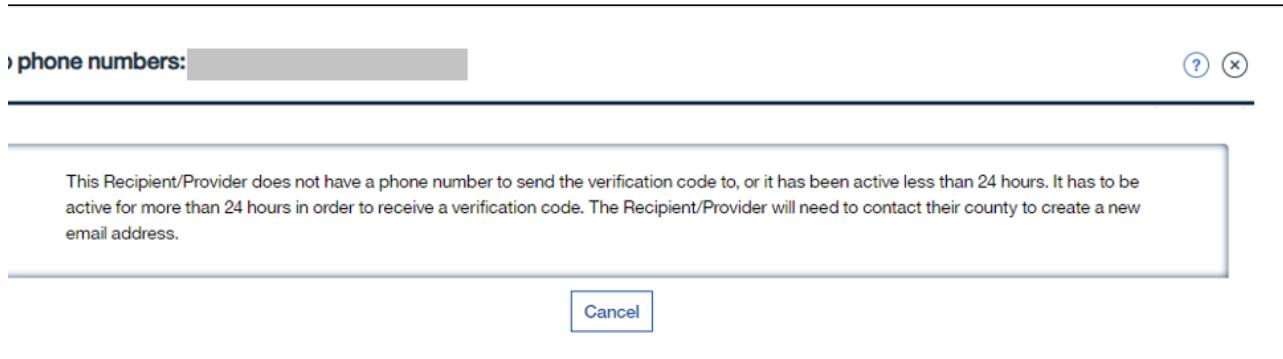


Figure – No Phone Numbers - (Provider/Recipient Has No Phone Number)

Actions/Functions

The following actions are associated with the No Phone Numbers pop-up:

Action	Function
Cancel	Cancels the action and returns the user to the Email Addresses screen.

Data Elements

There are no data elements associated with the No Phone Numbers pop-up.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Phone Number Email Not Available

CI	Document Name
 CI-823995 - DSD SC Phone Number Email Not Available CANCELLED	DSD_SC_Phone_Number_Email_Not_Available.docx

Cancelled.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Screen Designs/Phone Number Send Verification Code

CI	Document Name
 CI-823994 - DSD SC Phone Number Send Verification Code CANCELLED	DSD_SC_Phone_Number_Send_Verification_Code.docx

Cancelled.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Case Home Navigation

CI
 CI-740811 - DSD SF Case Home Navigation IMPLEMENTED

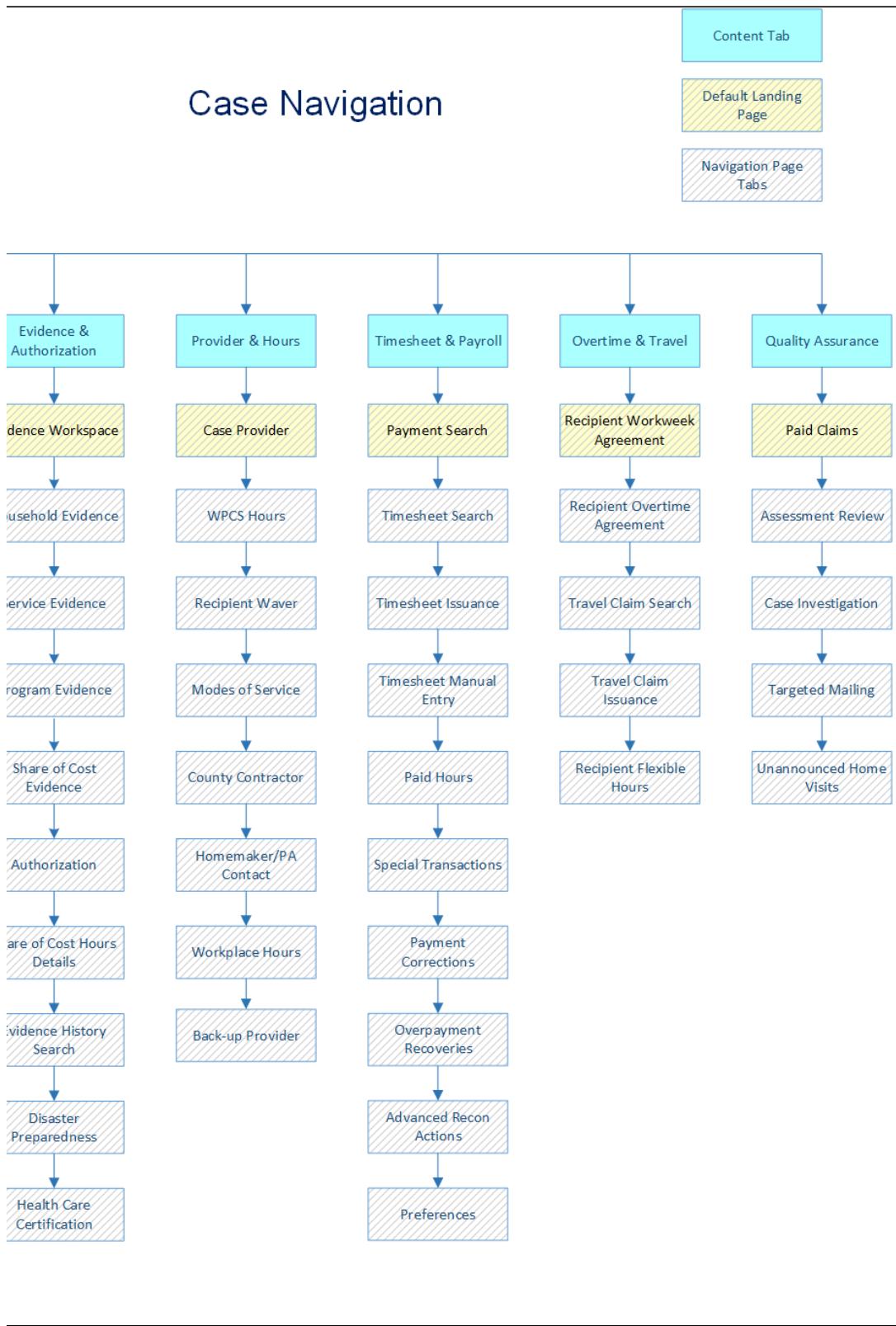


Figure – Case Home Navigation

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Person Navigation

CI
 CI-740810 - DSD SF Person Home Navigation IMPLEMENTED

The following Content and Navigation Page Tabs are associated with the Person Home:

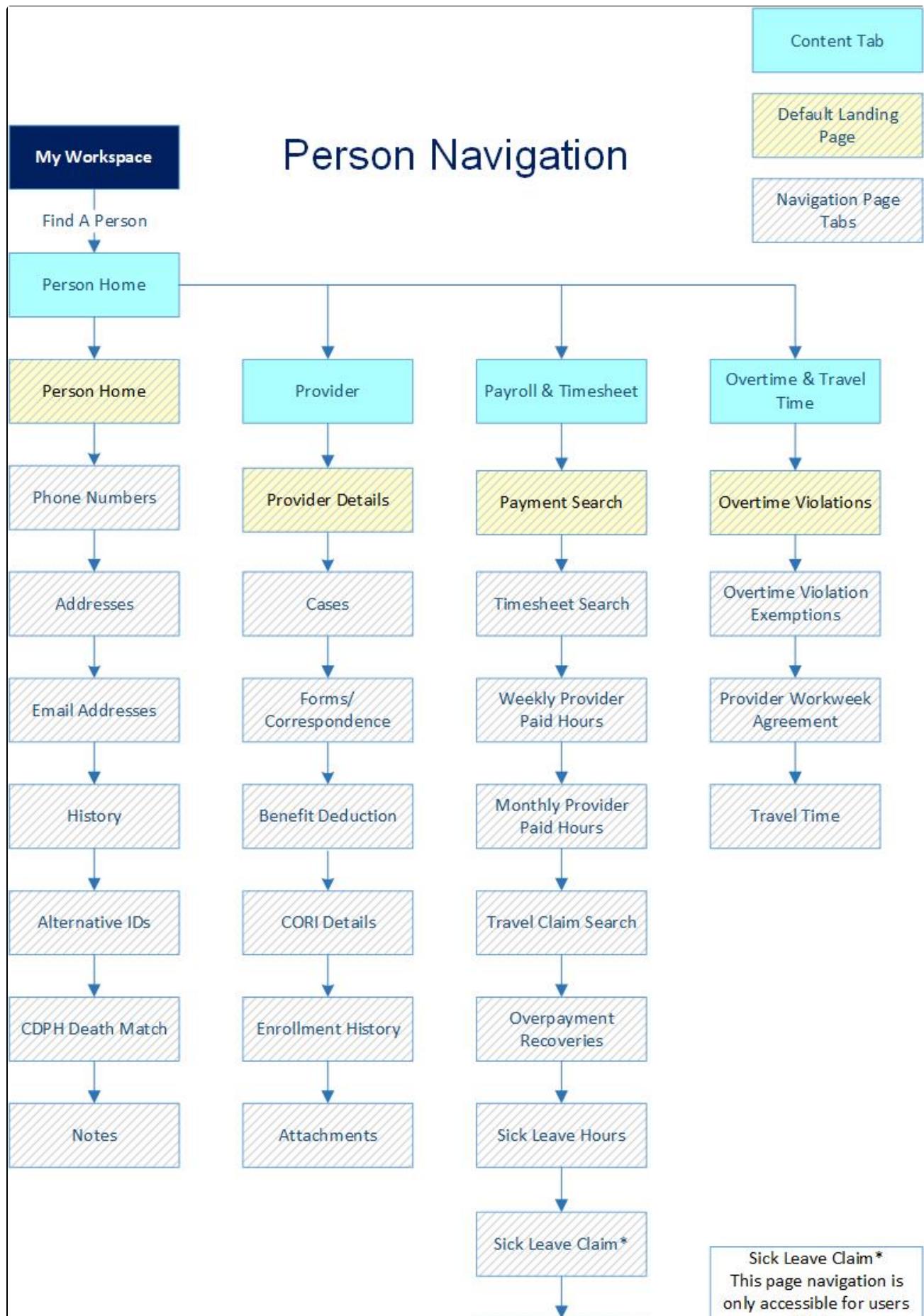




Figure – Person Navigational Elements

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Navigation Elements – My Workspace

CI	Document Name
CI-740807 - DSD SC My Workspace Navigation IMPLEMENTED	DSD_SC_My_Workspace_Navigation.docx

With the upgrade to Cúram 6.1 the system navigation has changed from a left navigational application to the usage of horizontal tabs, buttons and hyperlinks. The following is an example of the navigation of the My Workspace screen.

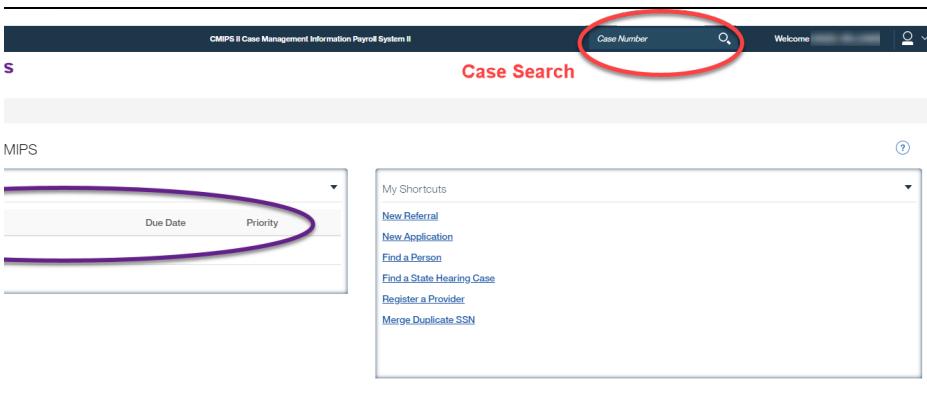


Figure – Navigation Elements – My Workspace

Cúram 7.0 Navigational Elements

Application Bar – At the very top of the screen the application bar displays as a black band with white font. Here a user will find the CMIPS "Application Name", the "User Name" and "Log out" links. The "Preference" link is a standard of the Cúram OOTB and cannot be removed.

Workspace Tabs – The tabs at the upper left of the screen, "My Workspace", "My Cases", "Inbox", etc. always display regardless of where a user might be in the application. These tabs act as shortcuts to other areas in the application.

Case Search – The Case Search now displays below the Log out link at the top right of the screen. This field can be used at any time to access a case.

Shortcut Panel – The Shortcut panel, on the left side of the screen, may be expanded or collapsed by using the (>>) (expand) or (<<) collapsed arrows. The buttons, "My Workspace", "Search", "Wage Rate", "County Contractor" and "Homemaker" are the same as the current CMIPS application. Two buttons, "Cases" and "Person", have been removed because the links are duplicative of existing functionality on other buttons.

In the **My Tasks** section of the screen, each column header is sortable. If the user had several tasks listed in the My Tasks section, selecting the Task, Subject, Due Date or Priority will re-sort the list. The sortable header is default Cúram OOTB functionality, but may be changed.

My Shortcuts – When logged on, the user will see the shortcuts associated with their security role.

To allow users to understand any changes in terminology and functionality, it is important to distinguish between the following:

- Buttons - Found on the expanded Shortcut Panel – My Workspace, Search, Wage Rate, County Contractor, Homemaker
- Tabs – Display horizontally across the screens. Depending upon where a user is in the application a user may see multiple tab rows.
- Actions - Still found throughout the application. Some are navigational, like the ones above found on the Expanded Shortcut Panel. Other times, they are functional like "Save", "Close", "Cancel", "View", "Edit", etc.

Shortcuts Tab – My Workspace

On the My Workspace screen, when the My Workspace tab is selected on the expanded Shortcuts panel on the left side of the screen users with access will see:

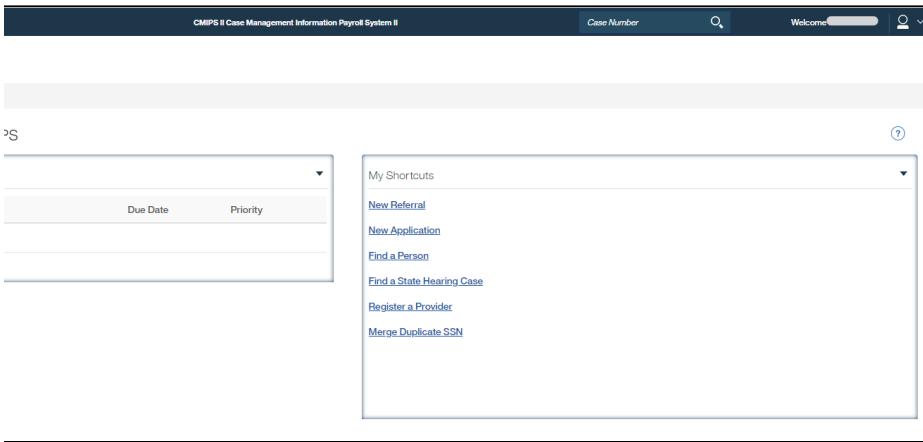


Figure – Shortcuts Tab – Search

Shortcuts Tab – Search

On the My Workspace screen, when the Search tab is selected on the expanded Shortcuts panel on the left side of the screen users with access will see:

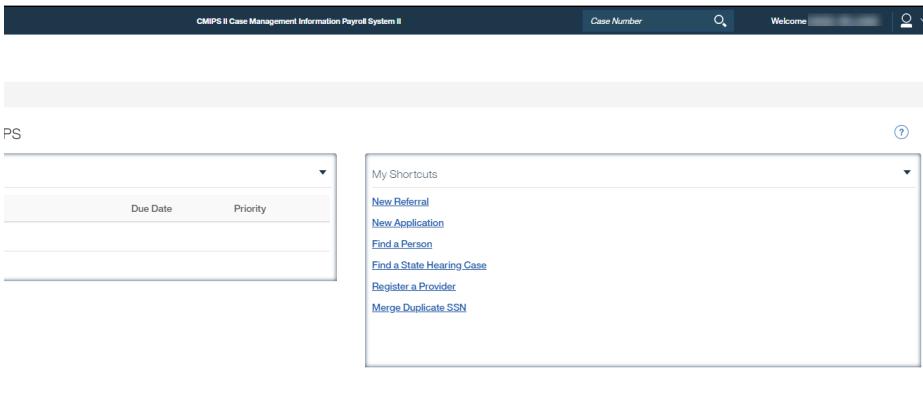


Figure – Shortcuts Tab – Search

Shortcuts Tab – Wage Rate

On the My Workspace screen, when the Wage Rate shortcut tab is selected on the expanded Shortcuts panel on the left side of the screen the Wage Rate Page Navigation links display. The user must select one of the displayed links "Public Authority Wage Rate" or "County Contractor Rate" and the associated screen displays.

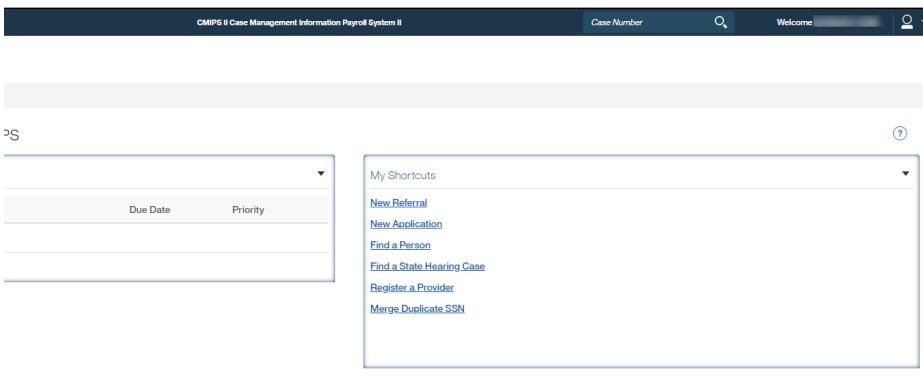


Figure – Shortcuts Tab – Wage Rate

Shortcuts Tab – County Contractor

On the My Workspace screen, when the County Contactor tab is selected on the expanded Shortcuts panel on the left side of the screen users with access will see:

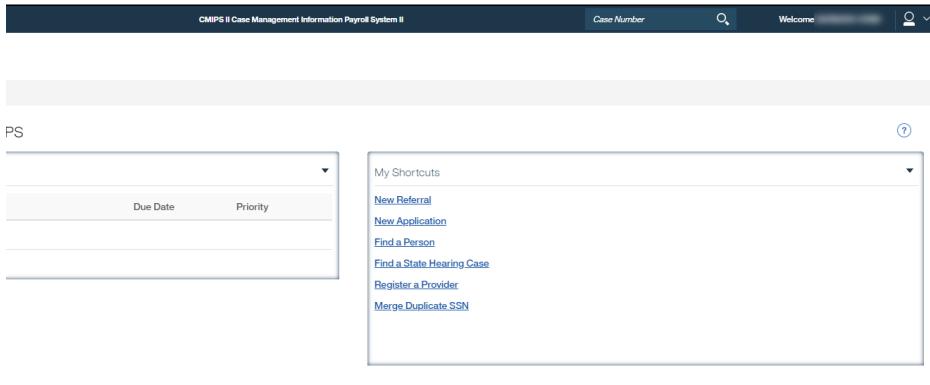


Figure – Shortcuts Tab – County Contractor

Shortcuts Tab – Homemaker

On the My Workspace screen, when the Homemaker tab is selected on the expanded Shortcuts panel on the left side of the screen users with access will see:

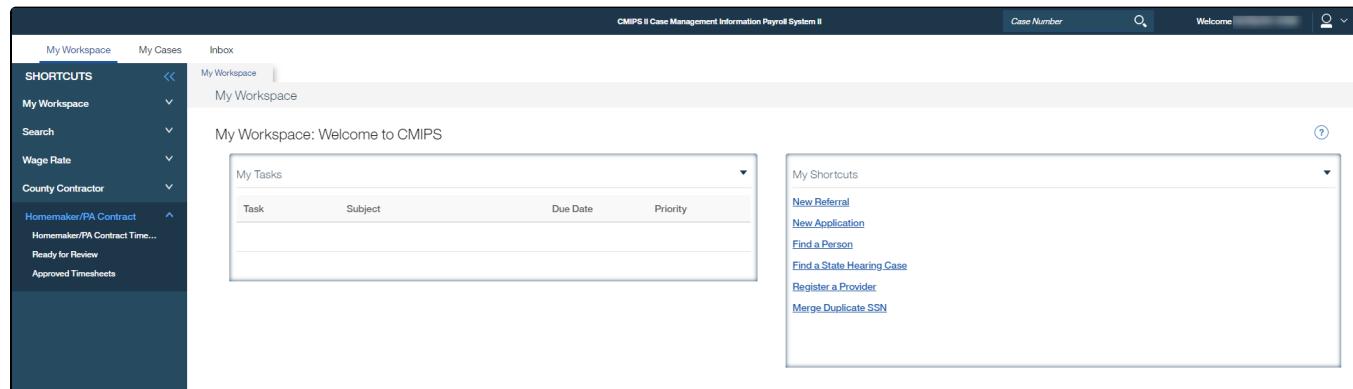


Figure – Shortcuts Tab – Homemaker

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Navigational/Navigation Elements County System Administrator Workspace

The following navigational links display on the Expanded Shortcut Panel when the Organization tab is selected for a user with access County System Administrator Workspace:

Expanded Shortcut Panel – Organization	Description
Home	Organization Unit Home (for the user)
Child Organization Units	Displays Organization Units list screen.
Positions	Displays the positions (for the County).
Users	Displays the users (for the County).

The following navigational link displays on the Expanded Shortcut Panel when the User Search tab is selected for a user with access County System Administrator Workspace:

Expanded Shortcut Panel – User Search	Description
Home	User's home screen.

The following navigational link displays on the Expanded Shortcut Panel when the Workflow Menu within the County System Administrator Workspace for a user with access County System Administrator Workspace:

Expanded Shortcut Panel – Workflow Menu	Description
Work Queues	Displays the Work Queues (for the County).

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/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. Error Messages – The indicated error must be resolved or further action will not be allowed.

- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (1-20)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (21-40)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (41-60)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (61-80)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (81-100)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (101-120)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (121-140)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (141-160)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (161-180)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (181-200)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (201-220)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (221-240)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (241-260)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (261-280)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (281-300)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
1	12650	CI-112139 - DSD EM OS 001 IMPLEMENTED	My Workspace – Case Search	When Case Search is initiated and the Case Number field is blank	Do not allow the action	Display the error message "Case Number required."
2	12650	CI-112111 - DSD EM OS 002 IMPLEMENTED	My Workspace – Case Search	When an entered case number does not match an existing case number	Do not allow the action	Display the error message "Case Number does not exist."
3	12650 20821 12667 12653	CI-112160 - DSD EM OS 003 IMPLEMENTED	Person Search, Person Search - Referral, Person Search – Application	When an attempt is made to search for a person and the following are true: <ul style="list-style-type: none"> • SSN is blank • CIN is blank • Provider Number is blank • Last Name is blank • Address is blank • Phone Number is blank • Email Address is blank • Other search criteria are or are not entered 	Do not allow the action	Display the error message, "One or more of the following search criteria are required: SSN, Full or Partial Last Name, CIN, Provider Number, Complete Address with or without Unit Type and Unit Number, Phone Number, or Email Address."
4	12318	CI-112171 - DSD EM OS 004 IMPLEMENTED	State Hearing Search	When Hearing Request date range is greater than 6 months.	Do not allow the action	Display the error message "State Hearing Request Date range cannot be more than 6 months."
7	16718	CI-112090 - DSD EM OS 007 IMPLEMENTED	Create Referral OR Create Alternative ID	When the Save link is selected on the "Create Referral" screen AND A "Blank SSN Reason" is indicated AND The SSN field is not blank OR When the Save link is selected on the "Create Alternative ID" screen AND The Alternative ID field is populated AND The Type = Social Security Number AND A "Blank SSN Reason" is indicated	Do not allow the action	Display the error message "SSN must be blank if Blank SSN Reason is indicated."
8			Removed per CR 568			

10	12051	CI-112165 - DSD EM OS 010 IMPLEMENTED	Create Referral	When the Save link is selected on the "Create Referral" screen and the indicated SSN matches an existing Alternative ID Type Social Security Number where the "Duplicates" field is blank	Do not allow the action	Display the error message "Person record with indicated SSN already exists. Please validate and re-enter SSN."
12			Removed per CR 568			
13	16718	CI-117948 - DSD EM OS 013 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen <ul style="list-style-type: none"> • and the SSN field is blank • and the "Blank SSN Reason" is not indicated 	Do not allow the action	Display the error message "Either SSN or Blank SSN Reason must be indicated."
14	12051	CI-112081 - DSD EM OS 014 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen and the indicated SSN matches an existing Alternative ID Type Social Security Number where the "Duplicates" field is blank	Do not allow the action	Display the error message "Person record with indicated SSN already exists. Please validate and re-enter SSN."
15	16718	CI-112108 - DSD EM OS 015 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen <ul style="list-style-type: none"> • and a Blank SSN Reason is indicated • and the SSN field is not blank 	Do not allow the action	Display the error message "SSN must be blank if Blank SSN Reason is indicated."
18	11952	CI-112102 - DSD EM OS 018 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen and the Mailing Address is blank or the "Same as Residence Address" is not indicated	Do not allow the action	Display the error message "Mailing Address or Same as Residence Address are required."
19	12650	CI-112118 - DSD EM OS 019 IMPLEMENTED	User Search	When the Search link is selected on the User Search screen and No User exists matching User Search criteria	Allow the action	Display the error message, "No user found matching User Search criteria."
20	16110 16112	CI-112079 - DSD EM OS 020 IMPLEMENTED	Create Case	When the Save link is selected on the "Create Case" screen and "Referral Date" is changed to a date more than two weeks prior to the previous date	Do not allow the action	Display the error message "Updated Referral Date may not be dated more than two week prior to previous Referral Date."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
21	12650	CI-112086 - DSD EM OS 021 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 100.	Allow the action	Display the error message "CIN does not exist for the applicant" on the Statewide Client Index – CIN Search screen
22	11952	CI-112122 - DSD EM OS 022 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the "Meets Residency Requirements" is blank for a Person Type of Applicant or Recipient	Do not allow the action	Display the error message "Meets Residency Requirements is required for Person Type Applicant or Recipient."
23	11982	CI-112154 - DSD EM OS 023 IMPLEMENTED	Maintain Street Address	During the address validation and standardization process, it is found that the Street number does not exist on the street entered	Allow the action	Display the message "The Street Number cannot be found on the Street specified."
24	11982	CI-112115 - DSD EM OS 024 IMPLEMENTED	Maintain Street Address	During the address validation and standardization process, it is found that the street entered does not exist in the Zip Code entered	Allow the action	Display the message "The Street cannot be found in the City or Zip Code specified."
25	11982	CI-112105 - DSD EM OS 025 IMPLEMENTED	All Maintain Address	During the address validation and standardization process, it is determined that not enough information was entered to find a matching address	Allow the action	Display the message "The City entered cannot be found."
26		Removed				
27	11982	CI-112097 - DSD EM OS 027 IMPLEMENTED	Maintain PO Box Address	During the address validation and standardization process it is found that the PO Box does not exist in the City and State entered	Allow the action	Display the message "The PO Box cannot be found in the City and State designated."

28	11982	CI-112134 - DSD EM OS 028 IMPLEMENTED	Maintain PO Box Address	During the address validation and standardization process no matching addresses could be found	Allow the action	Display the message "The address entered cannot be matched to a USPS address."
29		Removed				
30	11982	CI-112155 - DSD EM OS 030 IMPLEMENTED	Maintain Rural Route Address	During the address validation and standardization process no matching addresses could be found	Allow the action	Display the message "The address entered cannot be matched to a USPS address."
31		Removed				
32		Removed				
33		Removed				
34	11982	CI-112125 - DSD EM OS 034 IMPLEMENTED	Maintain Highway Address	During the address validation and standardization process no matching addresses could be found	Allow the action	Display the message "The address entered cannot be matched to a USPS address."
35		Removed				
36	11982	CI-112151 - DSD EM OS 036 IMPLEMENTED	Maintain Other Address	During the address validation and standardization process it is found that the house number does not exist on the street entered	Allow the action	Display the message "The Street Number cannot be found on the Street specified."
37	11982	CI-112166 - DSD EM OS 037 IMPLEMENTED	Maintain Other Address	During the address validation and standardization process it is found that the street entered does not exist in the ZIP code entered	Allow the action	Display the message "The Street cannot be found in the City or Zip Code specified."
38		Removed				
39		Removed				
40		Removed				

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
41			Removed			
42			Removed			
43	12051	CI-112103 - DSD EM OS 043 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the "Create Alternative ID" Pop-up AND The "Blank SSN Reason" field is blank AND The value entered for Alternative ID (Social Security Number) matches an existing Person record with an Alternative ID Type = Social Security Number where the 'Duplicates' field on the ConcernRoleID table is blank	Do not allow the action	Display the error message "Person record with indicated SSN already exists. Please validate and re-enter SSN."
44			Removed per CR 568			
45			Removed			
46			Removed			
47			Removed per CR 568			
48			Removed			
49		CI-112071 - DSD EM OS 049 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			

50		CI-112140 - DSD EM OS 050 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
51	16026	CI-112164 - DSD EM OS 051 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 305	Do not allow the action	Display "CIN does not match Applicant data" pop-up
52	16875 16877	CI-112104 - DSD EM OS 052 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is indicated and the Death Notification Source is blank	Do not allow the action	Display the error message "Death Notification Source required when Date of Death indicated."
53	16616 16875 16877	CI-112149 - DSD EM OS 053 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is indicated and the Reported Date of Death is blank	Do not allow the action	Display the error message "Reported Date of Death required when Date of Death indicated."
54	16875 16877	CI-112072 - DSD EM OS 054 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the either the Death Notification Source or the Reported Date of Death is indicated and the Date of Death is blank	Do not allow the action	Display the error message "Date of Death required."
55	16616 16875 16877	CI-112159 - DSD EM OS 055 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and a Death Outcome is Pending or Deceased and any of the following fields are blank: <ul style="list-style-type: none">• Date of Death• Death Notification Source• Reported Date of Death	Do not allow the action	Display the error message "Date of Death, Death Notification Source and Reported Date of Death are required when Death Outcome is indicated."
56	16875 16877	CI-112152 - DSD EM OS 056 IMPLEMENTED	Modify Person	When an attempt is made to save a Modify Person screen and the Date of Death is indicated and the Death Outcome is "Not Deceased"	Do not allow the action	Display the error message, "Date of Death not allowed for indicated Death Outcome."
57			Removed			
58			Removed			
59			Removed with CR 919			
60			Removed			

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
61			Removed with CR 919			
62	12650	CI-112091 - DSD EM OS 062 IMPLEMENTED	Create Referral	When the Save link is selected on the Create Referral screen and the Date of Birth is a future date	Do not allow the action	Display the error message, "Date of Birth may not be a future date."
63	12650	CI-112093 - DSD EM OS 063 IMPLEMENTED	Create Application	When the Save link is selected on the Create Application screen and the Date of Birth is a future date	Do not allow the action	Display the error message, "Date of Birth may not be a future date."
64	12650	CI-112148 - DSD EM OS 064 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Birth is a future date	Do not allow the action	Display the error message, "Date of Birth may not be a future date."
65			Removed			
66	11957	CI-112131 - DSD EM OS 066 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant or Recipient and the Ethnicity field is blank	Do not allow the action	Display the error message, "Ethnicity is required for Applicant or Recipient Person Type."

67	11952	CI-112128 - DSD EM OS 067 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and the "Assigned Worker" field is blank	Do not allow the action	Display the error message, "Assigned worker must be entered."
68			Removed			
69			Removed			
70	11952	CI-112116 - DSD EM OS 070 IMPLEMENTED	Create Application	When the Create Case link is selected on the Create Application screen and the area code is entered and is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
71	11952	CI-112156 - DSD EM OS 071 IMPLEMENTED	Create Application	When the "Save" link is selected on the Create Referral screen and the phone number is entered and is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
72			Removed			
73	11952	CI-112119 - DSD EM OS 073 IMPLEMENTED	Create Phone Number	When the "Save" link is selected on the Create Phone Number screen and the area code is entered and is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
74	11952	CI-112170 - DSD EM OS 074 IMPLEMENTED	Create Phone Number	When the "Save" link is selected on the Create Phone Number screen and the phone number is entered and is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
75	11952	CI-112169 - DSD EM OS 075 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and a Phone Number Type is selected and the Phone Number (either area code or phone numbers) is blank	Do not allow the action	Display the error message, "Area Code and Phone Number are required if the Phone Number Type is indicated".
76	11952	CI-112172 - DSD EM OS 076 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and the area code is entered and is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
77	11952	CI-112163 - DSD EM OS 077 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and the phone number is entered and is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
78	16193	CI-112083 - DSD EM OS 078 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and SSN entered is not nine (9) numeric digits.	Do not allow the action	Display the error message, "SSN must be nine numeric digits."
79			Removed			
80	11952	CI-112133 - DSD EM OS 080 IMPLEMENTED	Create Referral	When the "Save" links is selected on the Create Referral screen and either the Residence Address or the Primary Phone Numbers is not indicated	Do not allow the action	Display the error message, "Residence Address or Phone Number is required for Person Type Open Referral".

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
81	11952	CI-112142 - DSD EM OS 081 IMPLEMENTED	Modify Address	When the Save link is selected on a Maintain Address screen and the original From Date was a date in the past	Do not allow the action	Display the error message "Original From Date was a past date, modification not allowed. New Address record required."
82	11952	CI-112084 - DSD EM OS 082 IMPLEMENTED	Modify Address	When the Save link is selected on a Maintain Address screen and the original From Date was a future date and the date has been changed to the past date	Do not allow the action	Display the error message "Original From Date was a future date and cannot be changed to a past date."
83			Removed per CR 721			

84		 CI-112110 - DSD EM OS 084 <small>CANCELLED</small>	Cancelled by ASR Sprint 43 Team 1&2			
85		 CI-112098 - DSD EM OS 085 <small>CANCELLED</small>	Cancelled by ASR Sprint 43 Team 1&2			
86		 CI-112075 - DSD EM OS 086 <small>CANCELLED</small>	Cancelled by ASR Sprint 43 Team 1&2			
87	16876	 CI-112070 - DSD EM OS 087 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is a future date	Do not allow the action	Display the error message, "Date of Death may not be a future date".
88	16877	 CI-112101 - DSD EM OS 088 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Reported Date of Death is a future date	Do not allow the action	Display the error message, "Reported Date of Death may not be a future date".
89	11952	 CI-112076 - DSD EM OS 089 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is before the Date of Birth	Do not allow the action	Display the error message, "Date of Death may not be a before the Date of Birth".
90	16876	 CI-112145 - DSD EM OS 090 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Reported Date of Death is before the Date of Death	Do not allow the action	Display the error message, "Reported Date of Death may not be a before the Date of Death".
91	11952 12273	 CI-112080 - DSD EM OS 091 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Date of Birth field is blank.	Do not allow the action	Display the error message, "Date of Birth is required when Person Type is Applicant, Recipient or Provider".
92	16074 16212	 CI-112073 - DSD EM OS 092 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Gender field is blank.	Do not allow the action	Display the error message, "Gender is required when Person Type is Applicant, Recipient or Provider".
93	11956	 CI-112124 - DSD EM OS 093 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Spoken Language field is blank.	Do not allow the action	Display the error message, "Spoken Language is required when Person Type is Applicant, Recipient or Provider".
94	11956 16212	 CI-112094 - DSD EM OS 094 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Written Language field is blank.	Do not allow the action	Display the error message, "Written Language is required when Person Type is Applicant, Recipient or Provider".
95			Removed with CR 919			
96			Removed			
97	11952 12273 16212	 CI-112126 - DSD EM OS 097 <small>IMPLEMENTED</small>	Modify Phone Number	When the "Save" link is selected on the Modify Phone Number screen 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."
98	12025 16193	 CI-112150 - DSD EM OS 098 <small>IMPLEMENTED</small>	Modify Phone Number	When the "Save" link is selected on the Modify Phone Number screen 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."
99	12025 16193	 CI-112085 - DSD EM OS 099 <small>IMPLEMENTED</small>	Create Application	When the "Create Case" link is selected on the Create Application screen and the SSN entered is not nine (9) numeric digits.	Do not allow the action	Display the error message, "SSN must be nine numeric digits."
100	11952	 CI-112168 - DSD EM OS 100 <small>IMPLEMENTED</small>	Create Referral	When the "Save" link is selected on the Create Referral screen and the a Phone Number (Both Area Code or Phone Numbers) are entered, but a Phone Number Type is not selected	Do not allow the action	Display the error message, "Phone Number Type is required if Area Code and Phone Number are indicated".

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
101	11952	CI-112135 - DSD EM OS 101 IMPLEMENTED	Create Application	When the Create Case link is selected on the Create Application screen and the a Phone Number (Both Area Code or Phone Numbers) are entered, but a Phone Number Type is not selected	Do not allow the action	Display the error message, "Phone Number Type is required if Area Code and Phone Number are indicated".
102	11982	CI-112112 - DSD EM OS 102 IMPLEMENTED	Maintain Other Address	During the address validation and standardization process, if the Unit number is invalid or missing.	Allow the action	Display the message "The Unit Number is missing or invalid for the address specified."
103	11982	CI-112141 - DSD EM OS 103 IMPLEMENTED	Maintain Street Address	During the address validation and standardization process, if the Unit number is invalid or missing.	Allow the action	Display the message "The Unit Number is missing or invalid for the address specified."
104	11982	CI-112143 - DSD EM OS 104 IMPLEMENTED	All Address Screens	During the address validation and standardization process, if the ZIP code or ZIP+4 entered is invalid.	Allow the action	Display the message "The Zip Code or Zip+4 entered is an invalid format (99999-9999)."
105	11952 12273 16212	CI-112123 - DSD EM OS 105 IMPLEMENTED	Modify Phone Number	When the "Save" link is selected on the Modify Phone Number screen and the original From Date was a date in the past	Do not allow the action	Display the error message "Original From Date was a past date, modification not allowed. New Phone Number record required."
106		CI-112144 - DSD EM OS 106 IMPLEMENTED	Cancelled by ASR Sprint 60 Team 1&2			
107	11952 12273 16212	CI-112121 - DSD EM OS 107 IMPLEMENTED	Create Phone Number	When the "Save" link is selected on the Create Phone Number screen and the From Date was a date prior to the current date	Do not allow the action	Display the error message "From Date cannot be a past date."
108	12310	CI-112138 - DSD EM OS 108 IMPLEMENTED	Modify Address	The Person record Person Type is Provider and the Effective Date is later than the current date and this is the 1st address for a Provider	Do not allow the action	Display the error message, "Effective Date may not be in the future for the initial address."
109	12026 12032	CI-112127 - DSD EM OS 109 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 100	Do not allow the action	Display the error message. "CIN does not exist for the applicant."
110	16026 12030	CI-112106 - DSD EM OS 110 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 601	Do not allow the action	Display the error message. "Comma area length problem."
111	16026 16030 16032	CI-112113 - DSD EM OS 111 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 610	Do not allow the action	Display the error message. "Client Index XREF record not found."
112	12030 16026	CI-112162 - DSD EM OS 112 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 612	Do not allow the action	Display the error message. "Program ID error with SCIMEDS."
113	16026 16030 16032	CI-112137 - DSD EM OS 113 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 614	Do not allow the action	Display the error message. "Error with MEDS System ID."
114	16026 16030 16032	CI-112096 - DSD EM OS 114 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 616	Do not allow the action	Display the error message. "Error with linking SCIMEDS."
115	16026 16030 16032	CI-112147 - DSD EM OS 115 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 620	Do not allow the action	Display the error message. "Error with CINXREF read."

116	16026 16030 16032	CI-112100 - DSD EM OS 116 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 630	Do not allow the action	Display the error message. "MEDS record not found."
117	16026 16030	CI-112082 - DSD EM OS 117 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 640	Do not allow the action	Display the error message. "Error with MEDS read."
118	16026 16030	CI-112089 - DSD EM OS 118 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 600	Do not allow the action	Display the error message. "Invalid transaction type."
119	16026 16030 16032	CI-112092 - DSD EM OS 119 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 900	Do not allow the action	Display the error message. "SCI database problem."
120	16026 16030 16032	CI-112132 - DSD EM OS 120 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 999	Do not allow the action	Display the error message. "SCI system problem."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
121	12407 16026	CI-112117 - DSD EM OS 121 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 107	Do not allow the action	Display the error message, "SCI OU - Cannot update SSN on a minor consent case."
122	12407 16026	CI-112078 - DSD EM OS 122 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 707 or H07	Do not allow the action	Display the error message, "SCI OU - Application type is missing or invalid."
123	12407 16026	CI-112158 - DSD EM OS 123 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 801	Do not allow the action	Display the error message, "SCI OU - Client Index Number is missing or invalid."
124	12407 16026	CI-112095 - DSD EM OS 124 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 806	Do not allow the action	Display the error message, "SCI OU – Alien Number is missing or invalid."
125	12407 16026	CI-112136 - DSD EM OS 125 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 810	Do not allow the action	Display the error message, "SCI OU – Gender Code is missing or invalid."
126	12407 16026	CI-112161 - DSD EM OS 126 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 600	Do not allow the action	Display the error message, "Invalid transaction type."
127	12407 16026	CI-112114 - DSD EM OS 127 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 900	Do not allow the action	Display the error message, "SCI database problem."
128	12407 16026	CI-112107 - DSD EM OS 128 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 999	Do not allow the action	Display the error message, "SCI system problem."
129	16026	CI-112099 - DSD EM OS 129 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 600.	Allow the action	Display the error message, "Invalid transaction type."
130	16026	CI-112077 - DSD EM OS 130 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 900.	Allow the action	Display the error message, "SCI database problem."

131	16026	CI-112146 - DSD EM OS 131 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 999.	Allow the action	Display the error message, "SCI system problem."
132	16026	CI-112074 - DSD EM OS 132 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 811.	Allow the action	Display the error message, "SCI OI – Last name or first name is missing."
133			Removed with CR 919			
134			Removed with CR 919			
135			Removed with CR 919			
136	12025 12581	CI-116718 - DSD EM OS 136 IMPLEMENTED	Create Application OR Alternative ID	When the Create Case link is selected on the Create Application screen AND Social Security Number field is blank AND An Alternative ID Type SSN exists OR When the Save link is selected on the Alternative ID screen AND The Person Type for the individual <u>includes</u> Provider with Eligible = Yes OR The Person Type for the individual <u>includes</u> Provider with Eligible = No, where the individual has an active Cori Record with a Recipient Waiver AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN	Do not allow the action	Display the error message "SSN may not be deleted. Use New Alternative ID to correct an existing SSN."
137		CI-117922 - DSD EM OS 137 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
138		CI-117923 - DSD EM OS 138 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
139		CI-117924 - DSD EM OS 139 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
140		CI-117925 - DSD EM OS 140 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
141	16718	CI-117926 - DSD EM OS 141 IMPLEMENTED	Create Referral	When the Save link is selected on the Create Referral screen <ul style="list-style-type: none"> • and the Blank SSN Reason is "Duplicate Research" or "Applied for SSN" • and the SSN field is not blank 	Do not allow the action	Display the error message, "SSN must be blank if Blank SSN Reason is indicated."
142		CI-117927 - DSD EM OS 142 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			

143		 CI-117928 - DSD EM OS 143 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
144		 CI-117929 - DSD EM OS 144 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
145		 CI-117930 - DSD EM OS 145 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
146		 CI-117931 - DSD EM OS 146 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
147		 CI-117932 - DSD EM OS 147 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
148		 CI-117933 - DSD EM OS 148 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
149		 CI-117934 - DSD EM OS 149 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
150		 CI-117935 - DSD EM OS 150 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
151		 CI-117936 - DSD EM OS 151 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
152		 CI-117937 - DSD EM OS 152 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
153		 CI-117938 - DSD EM OS 153 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
154		 CI-117939 - DSD EM OS 154 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
155		 CI-117940 - DSD EM OS 155 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
156		 CI-117941 - DSD EM OS 156 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
157		 CI-117942 - DSD EM OS 157 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
158		 CI-117943 - DSD EM OS 158 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
159		 CI-117944 - DSD EM OS 159 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			

160		 CI-117945 - DSD EM OS 160 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
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No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
161		 CI-117946 - DSD EM OS 161 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
162		 CI-117947 - DSD EM OS 162 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
163		 CI-117724 - DSD EM OS 163 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
164		 CI-117725 - DSD EM OS 164 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
165		 CI-117726 - DSD EM OS 165 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
166		 CI-117727 - DSD EM OS 166 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
167		 CI-117728 - DSD EM OS 167 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
168		 CI-117729 - DSD EM OS 168 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
169		 CI-117730 - DSD EM OS 169 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
170		 CI-117731 - DSD EM OS 170 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
171		 CI-117918 - DSD EM OS 171 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
172		 CI-117917 - DSD EM OS 172 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
173		 CI-117916 - DSD EM OS 173 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			

174		 CI-117919 - DSD EM OS 174 CANCELLED	Cancelled ASR Sprint 42 Team 1&2			
175		 CI-118129 - DSD EM OS 175 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
176	16110 16112	 CI-290395 - DSD EM OS 176 IMPLEMENTED	Create Case	When the Save link is selected on the "Create Case" screen and "IHSS Referral Date" is changed to a date future to the displayed IHSS Referral Date	Do not allow the action	Display the error message "IHSS Referral Date may not be changed to a date future to the displayed IHSS Referral Date."
177	16927	 CI-434184 - DSD EM OS 177 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and an SCI search has not been performed	Do not allow the action	Display the error message, "Client Index Number search is required."
178	11993 12015	 CI-437231 - DSD EM OS 178 IMPLEMENTED	Maintain Street Address	When the "Select" link is selected on the Maintain Street Address screen and a Unit Number is indicated but the Unit Type field is blank	Do not allow the action	Display the error message, "Both Unit Type and Unit Number must be indicated."
179	11993 12015	 CI-437232 - DSD EM OS 179 IMPLEMENTED	Maintain Street Address	When the "Select" link is selected on the Maintain Street Address screen and a Unit Type is indicated but the Unit Number field is blank	Do not allow the action	Display the error message, "Both Unit Type and Unit Number must be indicated."
180	16937	 CI-444459 - DSD EM OS 180 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID and the Type is Client Index Number and the Person is not associated with a case (Person Type is not Applicant or Recipient)	Do not allow the action	Display the error message, "Create Alternate ID Type Client Index Number is not allowed without case. Use Create Case process to perform CIN clearance."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
181	16937	 CI-444460 - DSD EM OS 181 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID and the Type is Client Index Number and the case is in Terminated, Denied or Application Withdrawn status	Do not allow the action	Display the error message, "CIN Clearance is not allowed on case in [Status] status."
182	16937	 CI-444461 - DSD EM OS 182 IMPLEMENTED	Create Alternate ID – Type Client Index Number	When the Save link is selected on the Create Alternate ID screen and the Type is Client Index Number and the Duplicates field is other than blank	Do not allow the action	Display the error message, "Duplicates field must be blank when Alternate ID Type is Client Index Number."
183	16937	 CI-444462 - DSD EM OS 183 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID screen and the Type is Client Index Number and the Alternate ID field is blank and a CIN Clearance has been processed	Allow the action	Display the "Continue" link and the informational Message, "CIN not selected, Medi-Cal Eligibility Referral will be sent to SAWS."
184	16937	 CI-444463 - DSD EM OS 184 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID screen and the Type is Client Index Number and the Alternate ID field is blank and a CIN Clearance has not been performed	Do not allow the action	Display the Informational Message, "CIN search must be performed before Save action is allowed."
185	16937	 CI-444464 - DSD EM OS 185 IMPLEMENTED	Create Alternate ID – Type Client Index Number	When the Save link is selected on the Create Alternate ID – Type Client Index Number and the "From" date field is other than the current date	Do not allow the action	Display the error message, "From date must be the current date."

186	12032	CI-444465 - DSD EM OS 186 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen <ul style="list-style-type: none"> • and the Client Index Number field is blank • and a CIN Clearance has been performed 	Allow the action	Display the "Continue" link and the informational message, "CIN not selected, Medi-Cal Eligibility Referral will be sent to SAWS".
187	12032	CI-444466 - DSD EM OS 187 IMPLEMENTED	Statewide Client Index – CIN Search	When the CIN Search Results screen displays and a record is listed which matches the following fields on the CMIPS Person record: <ul style="list-style-type: none"> • First Name • Last Name • Date of Birth • Gender • Social Security Number, if present 	Allow the action	Display the informational message, "Valid matches were found, please review matches to obtain Medi-Cal Eligibility record. If matches are invalid select Cancel."
188		CI-444467 - DSD EM OS 188 CANCELLED	Cancelled by ASR Sprint 44 Team 1&2			
189	16937	CI-444468 - DSD EM OS 189 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the Create Alternative ID pop-up and the Type field is Client Index Number and the Alternative ID field is not blank but a Medi-Cal Eligibility record was not selected <p>Note: Client Index Number will be an alpha numeric value.</p>	Do not allow the action	Display the error message, "Save action is not allowed because indicated Alternative ID was not selected from SCI CIN Search. Please re-clear CIN and select the associated eligibility record."
190	16937	CI-444470 - DSD EM OS 190 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the Create Alternative ID pop-up and the Type field is Client Index Number and the Alternative ID field is either: <ul style="list-style-type: none"> • Less than nine characters • Or is more than nine characters • Or is not eight numeric characters followed by an alpha character 	Do not allow the action	Display the error message, "Client Index Number must be eight numeric characters followed by an alpha character."
191	12254	CI-445314 - DSD EM OS 191 IMPLEMENTED	Select Assessment Type	When the Save link is selected on the Select Assessment Type screen and the current case status is Terminated, Denied or Application Withdrawn	Do not allow the action	Display the error message, "New evidence may not be added to a case in Terminated, Denied or Application Withdrawn Status. Please take the appropriate Rescind or Reactivate action."
192	16943	CI-446462 - DSD EM OS 192 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the user taking the action is not assigned one of the following roles: <ul style="list-style-type: none"> • CaseMgmtProvMgmt • CaseMgmtProvMgmtPayroll • CDSSProgramMgmt • ProgramMgmt 	Do not allow the action	Display the error message, "You do not have sufficient privileges to view this page."
193	16943	CI-446463 - DSD EM OS 193 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and any of the following "parameters" on a record indicated as a "Duplicate" do not match one of the same parameter associated with the "Master" record: <ul style="list-style-type: none"> • First Name • Middle Name • Last Name • Date of Birth • Gender 	Do not allow the action	Display the error message for the erroneous record, "[parameter] on Duplicate person record does not match the Master person record". If more than one parameter does not match multiple parameters will display.

194	16943	CI-446464 - DSD EM OS 194 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record indicated as a "Duplicate" is a Person Type "Provider" the View Provider Details "Provider Status" is not Terminated	Do not allow the action	Display the error message for the erroneous record, "Duplicate Provider record associated with [case] currently has a Provider Status of "Active"". Records marked as Duplicates must be terminated from cases to allow this action. You must terminate the Provider before the merge action is allowed."
195	16943	CI-446465 - DSD EM OS 195 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record indicates as a Duplicate record is a Person Type "Applicant or Recipient" the case status is other than: <ul style="list-style-type: none">• Denied• Terminated• Application Withdrawn	Do not allow the action	Display the error message for the erroneous record, "Duplicate case Status must be Terminated, Denied or Application Withdrawn."
196	16943	CI-446466 - DSD EM OS 196 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the Social Security Number indicated is not nine (9) numeric characters	Do not allow the action	Display the error message associated with Social Security Number, "SSN must be nine numeric digits."
197	16943	CI-446467 - DSD EM OS 197 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record indicated as Master or Duplicate record and the value entered is not seven or nine numeric characters	Do not allow the action	Display the error message for the erroneous record, "Master or Duplicate entry must be either the seven digit case number or the nine digit Provider number."
198	16943	CI-446468 - DSD EM OS 198 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the seven digit (7) value entered is not found	Do not allow the action	Display the error message for the erroneous record, "Case Number does not exist"
199	16943	CI-446469 - DSD EM OS 199 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the nine digit (9) value entered is not found	Do not allow the action	Display the error message for the erroneous record, "No match found."
200	16943	CI-446470 - DSD EM OS 200 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the Master record indicated has as the most current Alternative ID Type Social Security Number a "Duplicates" field of "Duplicate SSN"	Do not allow the action	Display the error message for the erroneous record, "Master record indication not valid because it is indicated as a Duplicate SSN record. Please search all records with the indicated Social Security Number to find the current Master record and use that record as the Master. If current indication of Master Record is correct, please open an SR with the CMIPS Help Desk to have this issue resolved."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
201	16943	CI-446471 - DSD EM OS 201 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the Master Record is a Provider record and one or more of the Duplicate records is a case	Do not allow the action	Display the error message associated with the Master record, "A Provider may not be indicated as a Master record when any Duplicate record is a case. Please review entries and designate a case as the Master record."
202	16943	CI-446472 - DSD EM OS 202 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the most recent Master Record Alternative ID Type Social Security Duplicates field is indicated as Suspect SSN	Do not allow the action	Display the error message, "Master record is indicated as a Suspect SSN. Suspect SSN may not be merged as Duplicate SSN."
203	16943	CI-446473 - DSD EM OS 203 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and Social Security Number entered does not match the Alternative ID type Social Security Number or Conversion Duplicate of the Master Record	Do not allow the action	Display the error message, "Social Security Number entered must match Alternative ID Type Social Security Number or Conversion Duplicate for Master Record."
204	16943	CI-446474 - DSD EM OS 204 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record exists with the Alternative ID Type Social Security equal to the Social Security Number listed on the screen and the record is not indicated as the Master or a Duplicate	Do not allow the action	Display the error message, "[Case Number or Provider Number] is currently the Master Record, this record must be listed as either a Duplicate or Master."

205	11976	CI-489568 - DSD EM OS 205 IMPLEMENTED	Create Referral	When the Save link is selected on the Create Referral screen and the birth date year is more than 120 years prior to the current calendar year	Do not allow the action	Display the error message, "Birth year may not be more than 120 years in the past. Please verify Date of Birth."
206	11976	CI-489569 - DSD EM OS 206 IMPLEMENTED	Create Applicant	When the Save link is selected on the Create Applicant screen and the birth date year is more than 120 years prior to the current calendar year	Do not allow the action	Display the error message, "Birth year may not be more than 120 years in the past. Please verify Date of Birth."
207	11976	CI-489570 - DSD EM OS 207 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the birth date year is more than 120 years prior to the current calendar year	Do not allow the action	Display the error message, "Birth year may not be more than 120 years in the past. Please verify the Date of Birth."
208	20799	CI-497907 - DSD EM OS 208 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen And Person Type is Recipient And The Recipient Written Language is being updated from any language to Armenian And The Notice of Action Option is currently Audio CD	Do not allow the action	Display the message: "Notice of Action Option currently indicates Audio CD which is not available in Armenian. Please update the Notice of Action Option to other than Audio CD prior to updating the Recipient's written language to Armenian"
209	20799	CI-497908 - DSD EM OS 209 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen And Person Type is Recipient And The Recipient Written Language is being updated from any language to Cantonese And The Notice of Action Option is currently Audio CD	Do not allow the action	Display the message: "Notice of Action Option currently indicates Audio CD which is not available in Cantonese. Please update the Notice of Action Option to other than Audio CD prior to updating the Recipient's written language to Cantonese"
210	20799	CI-497909 - DSD EM OS 210 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen And Person Type is Recipient And The Recipient Written Language is being updated from any language to Mandarin And The Notice of Action Option is currently Audio CD	Do not allow the action	Display the message: "Notice of Action Option currently indicates Audio CD which is not available in Mandarin. Please update the Notice of Action Option to other than Audio CD prior to updating the Recipient's written language to Mandarin"
211		Error Message Removed with CR 1111				
212	20821	CI-507555 - DSD EM OS 212 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND an email address indicated has more than one "@"	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
213	20821	CI-507561 - DSD EM OS 213 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND an email address indicated has less than two (2) characters before the @	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
214	20821	CI-507562 - DSD EM OS 214 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND an email address indicated does not contain at least one "." in the domain name	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
215	20821	CI-507550 - DSD EM OS 215 IMPLEMENTED	Create Email Address	When the Save link is selected on the Create Email Address screen and the Begin Date is not the Current Date	Do not allow the action	Display the error message, "Begin date must be the current date."

216	20821	CI-507557 - DSD EM OS 216 IMPLEMENTED	Modify Email Address	When the Save link is selected on the Modify Email Address screen AND the From date has been change	Do not allow the action	Display the error message "From Date cannot be modified."
217			Cancelled ASR 1287 – Sprint 33			
218			Cancelled ASR 1287 – Sprint 33			
219			Cancelled ASR 1287 – Sprint 33			
220	12667	CI-507553 - DSD EM OS 220 IMPLEMENTED	Person Search, Person Search - Create Referral, Person Search – Create Application	When the Search link is selected and a Unit Type is indicated, but the Unit Number is blank	Do not allow the action	Display the error message, "Both the Unit Type and Unit Number are required when either is used as search criteria."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
221	12667	CI-507559 - DSD EM OS 221 IMPLEMENTED	Person Search, Person Search - Create Referral, Person Search – Create Application	When the Search link is selected and a Unit Number is indicated, but the Unit Type is blank	Do not allow the action	Display the error message, "Both the Unit Type and Unit Number are required when either is used as search criteria."
222	20821	CI-507560 - DSD EM OS 222 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND the email address indicated does not contain at least one character either before or after each "." in the domain name	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
223			Cancelled ASR 1287 – Sprint 33			
224	20821	CI-507554 - DSD EM OS 224 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND user name 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."
225			Cancelled ASR 1287 – Sprint 33			

226	20770	 CI-706205 - DSD EM OS 226 <small>IMPLEMENTED</small>	Edit Person Home	When the Save link is selected on the Person Home screen AND Person Type is Recipient AND The Recipient Written Language is being updated from any language to Armenian AND The IHSS Required Forms Option is Audio CD	Do not allow the action	Display the message, "IHSS Required Forms Option currently indicates Audio CD which is not available in Armenian. Please update the IHSS Required Forms Option to other than Audio CD prior to updating the Recipient's written language to Armenian"
227	20770	 CI-706206 - DSD EM OS 227 <small>IMPLEMENTED</small>	Edit Person Home	When the Save link is selected on the Person Home screen AND Person Type is Recipient AND The Recipient Written Language is being updated from any language to Cantonese AND The IHSS Required Forms Option is currently Audio CD	Do not allow the action	Display the message, "IHSS Required Forms Option currently indicates Audio CD which is not available in Cantonese. Please update the IHSS Required Forms Option to other than Audio CD prior to updating the Recipient's written language to Cantonese"
228	20770	 CI-706207 - DSD EM OS 228 <small>IMPLEMENTED</small>	Edit Person Home	When the Save link is selected on the Person Home screen AND Person Type is Recipient AND The Recipient Written Language is being updated from any language to Mandarin AND The IHSS Required Forms Option is currently Audio CD	Do not allow the action	Display the message, "IHSS Required Forms Option currently indicates Audio CD which is not available in Mandarin. Please update the IHSS Required Forms Option to other than Audio CD prior to updating the Recipient's written language to Mandarin"
229	11976 21082	 CI-790280 - DSD EM OS 229 <small>CANCELLED</small>	Cancelled by ASR Sprint 82 Team CM&AS			
230	11976 21083	 CI-790281 - DSD EM OS 230 <small>CANCELLED</small>	Cancelled by ASR Sprint 82 Team CM&AS			
231	20821	 CI-819666 - DSD EM OS 231 <small>IMPLEMENTED</small>	Inactivate Email Address	When the Inactive link is selected on the Email Addresses screen AND the person for that email address is registered as a User on the IHSS ESP	Do not allow the action	Display in the Inactivate Email Address e pop-up, the message, "Email address <person email address> cannot be Inactivated because <person first name last name> has an active IHSS Electronic Services Portal account."
232		Reserved by CR170 - SSR				
233		Reserved by CR170 - SSR				
234		Reserved by CR170 - SSR				

235	21254	CI-822871 - DSD EM OS 235 IMPLEMENTED	Create Alternative ID – Taxpayer ID for Provider	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Person Type is Provider</p> <p>ELSE IF</p> <p>The Person Type includes Provider and Applicant or Recipient with a Case Status of Denied, Application Withdrawn or Terminated</p> <p>AND</p> <p>The Alternative ID field is populated</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field is blank</p>	Do not allow the action	Display the message "Taxpayer ID entry is not allowed for a Provider."
236	21254	CI-822872 - DSD EM OS 236 IMPLEMENTED	Create Alternative ID – Blank SSN Reason for Taxpayer ID	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Alternative ID field is populated</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field = Applied for SSN</p>	Do not allow the action	Display the message "Blank SSN Reason field must be blank for Taxpayer ID entry."
237	21254	CI-822873 - DSD EM OS 237 IMPLEMENTED	Create Alternative ID – Blank or incomplete Alternative ID for Taxpayer ID	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field is blank</p> <p>AND</p> <p>The Alternative ID field is:</p> <ul style="list-style-type: none"> • Less than (9) numeric characters • OR more than (9) numeric characters • OR contains non-numeric characters 	Do not allow the action	Display the message "Taxpayer ID must be nine (9) numeric characters."

238	21254	CI-822874 - DSD EM OS 238 IMPLEMENTED	Create Alternative ID – Blank or incomplete Alternative ID for Taxpayer ID	When the Save link is selected on the Create Alternative ID pop-up AND The Type = Taxpayer ID AND The Blank SSN Reason field is blank AND The Alternative ID field is (9) numeric characters but begins with a number other than the number nine (9)	Do not allow the action	Display the message "A valid Taxpayer ID number must begin with the number nine (9). Please enter a valid TIN."
239	21254	CI-822875 - DSD EM OS 239 IMPLEMENTED	Create Alternative ID – Duplicate Taxpayer ID	When the Save link is selected on the Create Alternative ID pop-up AND The Type = Taxpayer ID AND The Blank SSN Reason field is blank AND The Alternative ID value entered matches an active (not end dated) Taxpayer ID on another person record in CMIPS	Do not allow the action	Display the message "The entered Taxpayer ID is already associated to Case Number <case number with the active Taxpayer ID>. Please verify/correct number and re-enter."
240	21254	CI-822876 - DSD EM OS 240 IMPLEMENTED	Create Alternative ID – No CIN Clearance for Taxpayer ID	When the CIN Clearance link is selected on the Create Alternative ID pop-up AND The Type = Taxpayer ID	Do not allow the action	Display the message "CIN Clearance is not allowed for a Taxpayer ID."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
241	21254	CI-822877 - DSD EM OS 241 IMPLEMENTED	Create Alternative ID – No Taxpayer ID if Active SSN Exists	When the Save button is selected on the Create Alternative ID pop-up AND The Alternative ID field contains (9) numeric characters AND The Type = Taxpayer ID AND The Blank SSN Reason field is blank AND The Person record has an Active (To = 12/31/9999 (high end date)) Alternative ID Type = SSN that contains a value in the Alternative ID field (not blank).	Do not allow the action	Display the message "Taxpayer ID cannot be created for a person with an existing SSN."

242	16718	CI-822883 - DSD EM OS 242 IMPLEMENTED	Create Alternative ID – No Existing SSN	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN AND There is not an existing SSN Alternative ID (not blank) for the individual	Do not allow the action	Display the error message, "There is no SSN for this individual. SSN cannot be removed."
243	16718	CI-822884 - DSD EM OS 243 IMPLEMENTED	Create Alternative ID – Blank SSN Reason Required	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field is blank	Do not allow the action	Display the error message, "A Blank SSN Reason must be selected."
244	21254	CI-822885 - DSD EM OS 244 IMPLEMENTED	Create Alternative ID – SSN Cannot Begin with '9'	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is populated with (9) numeric characters AND The Type = Social Security Number AND The Blank SSN Reason field is blank AND The number entered in the Alternative ID field begins with '9'	Do not allow the action	Display the error message, "A valid Social Security Number cannot begin with nine (9). Please enter a valid SSN."
245	16718	CI-822886 - DSD EM OS 245 IMPLEMENTED	Create Alternative ID – Comments Required When Removing SSN	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN AND The Comments field does not include any characters (cannot be only spaces)	Do not allow the action	Display the error message, "Comments are required when SSN is being removed."
246	21268	CI-822888 - DSD EM OS 246 IMPLEMENTED	Medi-Cal Eligibility Information – SCI Look-up ACCESSED FROM Create Alternative ID – CIN Clearance	When a Recipient or Applicant, where Alternative ID Type = Social Security Number for the individual has the 'Duplicates' field on the CONCERNROLEALTERNATEID table set as blank, selects the CIN Clearance link on the "Create Alternative ID" pop-up AND The indicated Alternative ID Type = Client Index Number AND The Alternative ID field is blank THEN The Eligibility link on the Statewide Client Index Search for the returned matching record where the CIN exists in CMIPS is selected	Do not allow the action	The user is taken to the Medi-Cal Eligibility Information - Home screen with no Medi-Cal information displayed where the following error message is displayed, "Person on record with indicated CIN already exists. Please resolve the conflict and perform CIN clearance again." AND A Return to CIN Select button is available.

247	21268	 CI-822889 - DSD EM OS 247 IMPLEMENTED	Medi-Cal Eligibility Information – SCI Look-up ACCESSED FROM Create Case – CIN Clearance	When an Applicant, where Alternative ID Type = Social Security Number for the individual has the 'Duplicates' field on the CONCERNROLEALTERNATEDID table set as blank, selects the search icon for CIN search where a CIN does not exist in CMIPS for the Applicant, but exists for another person on the Create Case screen AND Selects the CIN Clearance button THEN The Eligibility link on the Statewide Client Index Search for the returned matching record where the CIN exists in CMIPS is selected	Do not allow the action	The user is taken to the Medi-Cal Eligibility Information - Home screen with no Medi-Cal information displayed and an error message "Person record with indicated CIN already exists. Please resolve the conflict and perform CIN clearance again." AND A return to CIN Select button is available.
248	16718	 CI-822913 - DSD EM OS 248 IMPLEMENTED	Create Alternative ID – Removing a Removed SSN	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN AND The individual does not have an active SSN in CMIPS	Do not allow the action	Display the error message, "There is no current SSN for this individual. SSN cannot be removed."
249	21283	 CI-822946 - DSD EM OS 249 IMPLEMENTED	Create Alternative ID – Do Not Allow Creation of an SSN with a Single Number	When the Save button is selected on the Create Alternative ID pop-up AND The Type is selected as "Social Security Number" and the Alternative ID field contains any of the following numbers: '000000000' or '111111111' or '222222222' or '333333333' or '444444444' or '555555555' or '666666666' or '777777777' or '888888888' OR The Type is selected as "Taxpayer ID" and the Alternative ID field contains '999999999'	Do not allow the action	Display the error message, "This number is not a valid entry for this Alternative ID Type."
250	21284	 CI-822953 - DSD EM OS 250 IMPLEMENTED	Create Referral Screen - Do Not Allow Creation of an SSN Beginning with 'g'	When the Save button is selected on the Create Referral screen AND The entry in the "Social Security Number" field begins with a 'g'	Do not allow the action	Display the error message, "A valid Social Security Number cannot begin with nine (9). Please enter a valid SSN."
251	21283	 CI-822948 - DSD EM OS 251 IMPLEMENTED	Create Referral Screen - Do Not Allow Creation of an SSN with a Single Number	When the Save button is selected on the Create Referral screen AND The "Social Security Number" field contains any of the following numbers: '000000000' or '111111111' or '222222222' or '333333333' or '444444444' or '555555555' or '666666666' or '777777777' or '888888888'	Do not allow the action	Display the error message, "<entered number> is not a valid entry for the Social Security Number."
252	21284	 CI-822952 - DSD EM OS 252 IMPLEMENTED	Create Application Screen - Do Not Allow Creation of an SSN Beginning with 'g'	When the Create Case button is selected on the Create Application screen AND The entry in the "Social Security Number" field begins with a 'g'	Do not allow the action	Display the error message, "A valid Social Security Number cannot begin with nine (9). Please enter a valid SSN."
253	21283	 CI-822949 - DSD EM OS 253 IMPLEMENTED	Create Application Screen - Do Not Allow Creation of an SSN with a Single Number	When the Create Case button is selected on the Create Application screen AND The "Social Security Number" field contains any of the following numbers: '000000000' or '111111111' or '222222222' or '333333333' or '444444444' or '555555555' or '666666666' or '777777777' or '888888888'	Do not allow the action	Display the error message, "<entered number> is not a valid entry for the Social Security Number."

254	16212	CI-823063 - DSD EM OS 254 IMPLEMENTED	Create Phone Number Screen - Do Not Allow Multiple Phone Types as Primary OR Modify Phone Number Screen - Do Not Allow Multiple Phone Types as Primary	When a user edits or adds a new phone number of the same type on the Create Phone Number and Modify Phone Number screen AND Does not indicate that phone type as primary.	Do not allow the action	Display the error message, "Primary number required. Please choose a different phone type as primary to update this one."
255	11956	CI-823079 - DSD EM OS 255 IMPLEMENTED	Do Not Allow Special and Numeric Characters on Other Written Language Details Field	When the user attempts to save a special and/or numeric character in the Other Written Language Details field on Modify Person screen OR Person Home – Provider screen OR Create Referral screen OR Create Provider screen OR Create Application screen	Do not allow the action	Display the error message, "Other Written Language Details field allows only English language alpha characters"
256	11956	CI-823080 - DSD EM OS 256 IMPLEMENTED	Do Not Allow Special and Numeric Characters on Other Spoken Language Details Field	When the user attempts to save a special and/or numeric character in the Other Spoken Language Details field on Modify Person screen OR Person Home – Provider screen OR Create Referral screen OR Create Provider screen OR Create Application screen	Do not allow the action	Display the error message, "Other Spoken Language Details field allows only English language alpha characters."
257	11982	CI-823347 - DSD EM OS 257 IMPLEMENTED	Maintain General Delivery Address	During the address validation and standardization process on the Maintain General Delivery Address screen, no matching addresses could be found	Allow the action	Display the message, "The address entered cannot be matched to a USPS address."
258	21375	CI-823575 - DSD EM OS 258 IMPLEMENTED	Create Message Pop-Up - Reminder Date not valid	When the user clicks the Preview button on the Create Message Pop-Up screen AND Date entered is not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'Action Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered <'13/30/2023>."
259	21375	CI-823576 - DSD EM OS 259 IMPLEMENTED	Create Message Pop-Up - Reminder Date Required for Selected Subject	When the user clicks the Preview button on the Create Message Pop-Up screen AND The selected message type requires a date AND The Action Date field was not selected	Do not allow the action	Display the error message, "Action Date required for the selected Subject."
260	21375	CI-823577 - DSD EM OS 260 IMPLEMENTED	Create Message Pop-Up - Reminder Date selected has passed	When the user clicks the Preview button on the Create Message Pop-Up screen AND The selected message type requires a date AND The Action Date field was selected for a past date	Do not allow the action	Display the error message, "Action Date must be the current or a future date."

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
261	21375	CI-823578 - DSD EM OS 261 IMPLEMENTED	Create Message Pop-Up - User not Registered /Inactive	When the user clicks the Send button or Send & New button on the Create Message Pop-Up screen AND The user is not registered to ESP OR Their ESP registration status is Inactive	Do not allow the action	Display the error message, "This user is not registered to the ESP. Message not sent."

262	21375	CI-823579 - DSD EM OS 262 IMPLEMENTED	Create Message Pop-Up - Form Name not selected	When the user clicks the Preview button on the Create Message Pop-Up screen AND The selected message type requires a form name AND The Form Name field was not selected	Do not allow the action	Display the error message, "Form Name required for the selected Subject."
263	21375	CI-823600 - DSD EM OS 263 IMPLEMENTED	Create Message Pop-Up - Form Name not allowed	When the user clicks the Preview button on the Create Message Pop-Up screen AND The selected Subject type does not require a form name AND A Form Name was selected	Do not allow the action	Display the error message, "Form Name is not allowed for the selected Subject."
264	12650	CI-823463 - DSD EM OS 264 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, Person Search - Application screen AND Area code entered is not three numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
265	12650	CI-823464 - DSD EM OS 265 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen AND Phone number entered is not seven numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
266	12650	CI-823465 - DSD EM OS 266 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen AND Three digit Area Code is entered but Phone Number is blank OR Area Code is blank but seven digit Phone Number is entered	Do not allow the action	Display the error message, "Phone number must be entered."
267	12650	CI-823466 - DSD EM OS 267 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen 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."

268	12650	CI-823728 - DSD EM OS 268 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
269	11952 12273	CI-823730 - DSD EM OS 269 IMPLEMENTED	Create Referral, Modify Phone Number	When the user clicks the Save button on the Create Referral or Modify Phone Number screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
270	12273	CI-823731 - DSD EM OS 270 IMPLEMENTED	Create Phone Number	When the user clicks the Save or Save & New button on the Create Phone Number screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
271	11976	CI-823732 - DSD EM OS 271 IMPLEMENTED	Create Application	When the user clicks the Create Case button on the Create Application screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
272	16218	CI-823783 - DSD EM OS 272 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up with no data in the 'Creation To Date' Field	Do not allow the action	Display the error message, "Creation To Date" must be entered."
273	16218	CI-823784 - DSD EM OS 273 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up with no data in the 'Creation From Date' Field	Do not allow the action	Display the error message, "Creation From Date" must be entered."
274	16218	CI-823785 - DSD EM OS 274 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up AND The data in the 'Creation To Date' field display in a format that is not MM/DD/YYYY (date format can be M/DD/YYYY, M/D/YYYY, or MM/D/YYYY)	Do not allow the action	Display the error message, "The field 'Creation To Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<what the user entered>'."
275	16218	CI-823786 - DSD EM OS 275 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up AND The data in the 'Creation From Date' field display in a format that is not MM/DD/YYYY (date format can be M/DD/YYYY, M/D/YYYY, or MM/D/YYYY)	Do not allow the action	Display the error message, "The field 'Creation From Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<what the user entered>'."
276	21383	CI-823991 - DSD EM OS 276 IMPLEMENTED	Update Email Address - User enters an invalid Verification Code	When the user enters an invalid Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message: "Invalid verification code, please enter a valid verification code."
277	21383	CI-823992 - DSD EM OS 277 IMPLEMENTED	Update Email Address - User enters an expired Verification Code	When the user enters an expired Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message: "Verification code expired, please select "Resend Code" to receive a new one."
278	21383	CI-823993 - DSD EM OS 278 IMPLEMENTED	Update Email Address - User enters a blocked Verification Code	When the user enters a blocked Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message: "The verification code is blocked since you've entered an incorrect verification code more than 5 times. Please select "Resend Code" to receive a new one."
279	12667	CI-824449 - DSD EM OS 279 IMPLEMENTED	Person Search - Search by Last 4 SSN and All SSN	When the user doesn't select "Last 4 SSN" checkbox AND selects "All SSN" checkbox	Do not allow the action	Display the error message, "You must enter only last four digits when "Last 4 SSN" option is checked."

280	12667	 CI-824450 - DSD EM OS 280 IMPLEMENTED	Person Search - Search by Last 4 SSN	When the user select "Last 4 SSN" checkbox AND doesn't select "All SSN" checkbox AND does not enter 4-digit number	Do not allow the action	Display the error message, "You must enter only last four digits when "Last 4 SSN" option is checked."
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DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (1-20)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
1	12650	CI-112139 - DSD EM OS 001 IMPLEMENTED	My Workspace – Case Search	When Case Search is initiated and the Case Number field is blank	Do not allow the action	Display the error message "Case Number required."
2	12650	CI-112111 - DSD EM OS 002 IMPLEMENTED	My Workspace – Case Search	When an entered case number does not match an existing case number	Do not allow the action	Display the error message "Case Number does not exist."
3	12650 20821 12667 12653	CI-112160 - DSD EM OS 003 IMPLEMENTED	Person Search, Person Search - Referral, Person Search – Application	When an attempt is made to search for a person and the following are true: <ul style="list-style-type: none">• SSN is blank• CIN is blank• Provider Number is blank• Last Name is blank• Address is blank• Phone Number is blank• Email Address is blank• Other search criteria are or are not entered	Do not allow the action	Display the error message, "One or more of the following search criteria are required: SSN, Full or Partial Last Name, CIN, Provider Number, Complete Address with or without Unit Type and Unit Number, Phone Number, or Email Address."
4	12318	CI-112171 - DSD EM OS 004 IMPLEMENTED	State Hearing Search	When Hearing Request date range is greater than 6 months.	Do not allow the action	Display the error message "State Hearing Request Date range cannot be more than 6 months."
7	16718	CI-112090 - DSD EM OS 007 IMPLEMENTED	Create Referral OR Create Alternative ID	When the Save link is selected on the "Create Referral" screen AND A "Blank SSN Reason" is indicated AND The SSN field is not blank OR When the Save link is selected on the "Create Alternative ID" screen AND The Alternative ID field is populated AND The Type = Social Security Number AND A "Blank SSN Reason" is indicated	Do not allow the action	Display the error message "SSN must be blank if Blank SSN Reason is indicated."
8			Removed per CR 568			
10	12051	CI-112165 - DSD EM OS 010 IMPLEMENTED	Create Referral	When the Save link is selected on the "Create Referral" screen and the indicated SSN matches an existing Alternative ID Type Social Security Number where the "Duplicates" field is blank	Do not allow the action	Display the error message "Person record with indicated SSN already exists. Please validate and re-enter SSN."
12			Removed per CR 568			
13	16718	CI-117948 - DSD EM OS 013 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen <ul style="list-style-type: none">• and the SSN field is blank• and the "Blank SSN Reason" is not indicated	Do not allow the action	Display the error message "Either SSN or Blank SSN Reason must be indicated."
14	12051	CI-112081 - DSD EM OS 014 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen and the indicated SSN matches an existing Alternative ID Type Social Security Number where the "Duplicates" field is blank	Do not allow the action	Display the error message "Person record with indicated SSN already exists. Please validate and re-enter SSN."

15	16718	CI-112108 - DSD EM OS 015 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen <ul style="list-style-type: none"> • and a Blank SSN Reason is indicated • and the SSN field is not blank 	Do not allow the action	Display the error message "SSN must be blank if Blank SSN Reason is indicated."
18	11952	CI-112102 - DSD EM OS 018 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the "Create Application" screen and the Mailing Address is blank or the "Same as Residence Address" is not indicated	Do not allow the action	Display the error message "Mailing Address or Same as Residence Address are required."
19	12650	CI-112118 - DSD EM OS 019 IMPLEMENTED	User Search	When the Search link is selected on the User Search screen and No User exists matching User Search criteria	Allow the action	Display the error message, "No user found matching User Search criteria."
20	16110 16112	CI-112079 - DSD EM OS 020 IMPLEMENTED	Create Case	When the Save link is selected on the "Create Case" screen and "Referral Date" is changed to a date more than two weeks prior to the previous date	Do not allow the action	Display the error message "Updated Referral Date may not be dated more than two week prior to previous Referral Date."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (21-40)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
21	12650	CI-112086 - DSD EM OS 021 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 100.	Allow the action	Display the error message "CIN does not exist for the applicant" on the Statewide Client Index – CIN Search screen
22	11952	CI-112122 - DSD EM OS 022 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the "Meets Residency Requirements" is blank for a Person Type of Applicant or Recipient	Do not allow the action	Display the error message "Meets Residency Requirements is required for Person Type Applicant or Recipient."
23	11982	CI-112154 - DSD EM OS 023 IMPLEMENTED	Maintain Street Address	During the address validation and standardization process, it is found that the Street number does not exist on the street entered	Allow the action	Display the message "The Street Number cannot be found on the Street specified."
24	11982	CI-112115 - DSD EM OS 024 IMPLEMENTED	Maintain Street Address	During the address validation and standardization process, it is found that the street entered does not exist in the Zip Code entered	Allow the action	Display the message "The Street cannot be found in the City or Zip Code specified."
25	11982	CI-112105 - DSD EM OS 025 IMPLEMENTED	All Maintain Address	During the address validation and standardization process, it is determined that not enough information was entered to find a matching address	Allow the action	Display the message "The City entered cannot be found."
26		Removed				
27	11982	CI-112097 - DSD EM OS 027 IMPLEMENTED	Maintain PO Box Address	During the address validation and standardization process it is found that the PO Box does not exist in the City and State entered	Allow the action	Display the message "The PO Box cannot be found in the City and State designated."
28	11982	CI-112134 - DSD EM OS 028 IMPLEMENTED	Maintain PO Box Address	During the address validation and standardization process no matching addresses could be found	Allow the action	Display the message "The address entered cannot be matched to a USPS address."
29		Removed				
30	11982	CI-112155 - DSD EM OS 030 IMPLEMENTED	Maintain Rural Route Address	During the address validation and standardization process no matching addresses could be found	Allow the action	Display the message "The address entered cannot be matched to a USPS address."
31		Removed				
32		Removed				
33		Removed				
34	11982	CI-112125 - DSD EM OS 034 IMPLEMENTED	Maintain Highway Address	During the address validation and standardization process no matching addresses could be found	Allow the action	Display the message "The address entered cannot be matched to a USPS address."
35		Removed				
36	11982	CI-112151 - DSD EM OS 036 IMPLEMENTED	Maintain Other Address	During the address validation and standardization process it is found that the house number does not exist on the street entered	Allow the action	Display the message "The Street Number cannot be found on the Street specified."
37	11982	CI-112166 - DSD EM OS 037 IMPLEMENTED	Maintain Other Address	During the address validation and standardization process it is found that the street entered does not exist in the ZIP code entered	Allow the action	Display the message "The Street cannot be found in the City or Zip Code specified."
38		Removed				
39		Removed				
40		Removed				

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (41-60)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
41			Removed			
42			Removed			
43	12051	CI-112103 - DSD EM OS 043 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the "Create Alternative ID" Pop-up AND The "Blank SSN Reason" field is blank AND The value entered for Alternative ID (Social Security Number) matches an existing Person record with an Alternative ID Type = Social Security Number where the 'Duplicates' field on the ConcernRoleID table is blank	Do not allow the action	Display the error message "Person record with indicated SSN already exists. Please validate and re-enter SSN."
44			Removed per CR 568			
45			Removed			
46			Removed			
47			Removed per CR 568			
48			Removed			
49		CI-112071 - DSD EM OS 049 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
50		CI-112140 - DSD EM OS 050 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
51	16026	CI-112164 - DSD EM OS 051 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 305	Do not allow the action	Display "CIN does not match Applicant data" pop-up
52	16875 16877	CI-112104 - DSD EM OS 052 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is indicated and the Death Notification Source is blank	Do not allow the action	Display the error message "Death Notification Source required when Date of Death indicated."
53	16616 16875 16877	CI-112149 - DSD EM OS 053 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is indicated and the Reported Date of Death is blank	Do not allow the action	Display the error message "Reported Date of Death required when Date of Death indicated."
54	16875 16877	CI-112072 - DSD EM OS 054 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the either the Death Notification Source or the Reported Date of Death is indicated and the Date of Death is blank	Do not allow the action	Display the error message "Date of Death required."
55	16616 16875 16877	CI-112159 - DSD EM OS 055 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and a Death Outcome is Pending or Deceased and any of the following fields are blank: <ul style="list-style-type: none">• Date of Death• Death Notification Source• Reported Date of Death	Do not allow the action	Display the error message "Date of Death, Death Notification Source and Reported Date of Death are required when Death Outcome is indicated."

56	16875 16877	 CI-112152 - DSD EM OS 056 IMPLEMENTED	Modify Person	When an attempt is made to save a Modify Person screen and the Date of Death is indicated and the Death Outcome is "Not Deceased"	Do not allow the action	Display the error message, "Date of Death not allowed for indicated Death Outcome."
57			Removed			
58			Removed			
59			Removed with CR 919			
60			Removed			

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (61-80)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
61			Removed with CR 919			
62	12650	CI-112091 - DSD EM OS 062 IMPLEMENTED	Create Referral	When the Save link is selected on the Create Referral screen and the Date of Birth is a future date	Do not allow the action	Display the error message, "Date of Birth may not be a future date."
63	12650	CI-112093 - DSD EM OS 063 IMPLEMENTED	Create Application	When the Save link is selected on the Create Application screen and the Date of Birth is a future date	Do not allow the action	Display the error message, "Date of Birth may not be a future date."
64	12650	CI-112148 - DSD EM OS 064 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Birth is a future date	Do not allow the action	Display the error message, "Date of Birth may not be a future date."
65			Removed			
66	11957	CI-112131 - DSD EM OS 066 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant or Recipient and the Ethnicity field is blank	Do not allow the action	Display the error message, "Ethnicity is required for Applicant or Recipient Person Type."
67	11952	CI-112128 - DSD EM OS 067 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and the "Assigned Worker" field is blank	Do not allow the action	Display the error message, "Assigned worker must be entered."
68			Removed			
69			Removed			
70	11952	CI-112116 - DSD EM OS 070 IMPLEMENTED	Create Application	When the Create Case link is selected on the Create Application screen and the area code is entered and is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
71	11952	CI-112156 - DSD EM OS 071 IMPLEMENTED	Create Application	When the "Save" link is selected on the Create Referral screen and the phone number is entered and is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
72			Removed			
73	11952	CI-112119 - DSD EM OS 073 IMPLEMENTED	Create Phone Number	When the "Save" link is selected on the Create Phone Number screen and the area code is entered and is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
74	11952	CI-112170 - DSD EM OS 074 IMPLEMENTED	Create Phone Number	When the "Save" link is selected on the Create Phone Number screen and the phone number is entered and is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
75	11952	CI-112169 - DSD EM OS 075 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and a Phone Number Type is selected and the Phone Number (either area code or phone numbers) is blank	Do not allow the action	Display the error message, "Area Code and Phone Number are required if the Phone Number Type is indicated".
76	11952	CI-112172 - DSD EM OS 076 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and the area code is entered and is not three (3) numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
77	11952	CI-112163 - DSD EM OS 077 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and the phone number is entered and is not seven (7) numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."

78	16193	 CI-112083 - DSD EM OS 078 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and SSN entered is not nine (9) numeric digits.	Do not allow the action	Display the error message, "SSN must be nine numeric digits."
79			Removed			
80	11952	 CI-112133 - DSD EM OS 080 IMPLEMENTED	Create Referral	When the "Save" links is selected on the Create Referral screen and either the Residence Address or the Primary Phone Numbers is not indicated	Do not allow the action	Display the error message, "Residence Address or Phone Number is required for Person Type Open Referral".

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (81-100)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
81	11952	CI-112142 - DSD EM OS 081 IMPLEMENTED	Modify Address	When the Save link is selected on a Maintain Address screen and the original From Date was a date in the past	Do not allow the action	Display the error message "Original From Date was a past date, modification not allowed. New Address record required."
82	11952	CI-112084 - DSD EM OS 082 IMPLEMENTED	Modify Address	When the Save link is selected on a Maintain Address screen and the original From Date was a future date and the date has been changed to the past date	Do not allow the action	Display the error message "Original From Date was a future date and cannot be changed to a past date."
83			Removed per CR 721			
84		CI-112110 - DSD EM OS 084 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
85		CI-112098 - DSD EM OS 085 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
86		CI-112075 - DSD EM OS 086 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
87	16876	CI-112070 - DSD EM OS 087 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is a future date	Do not allow the action	Display the error message, "Date of Death may not be a future date".
88	16877	CI-112101 - DSD EM OS 088 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Reported Date of Death is a future date	Do not allow the action	Display the error message, "Reported Date of Death may not be a future date".
89	11952	CI-112076 - DSD EM OS 089 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Date of Death is before the Date of Birth	Do not allow the action	Display the error message, "Date of Death may not be before the Date of Birth".
90	16876	CI-112145 - DSD EM OS 090 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Reported Date of Death is before the Date of Death	Do not allow the action	Display the error message, "Reported Date of Death may not be before the Date of Death".
91	11952 12273	CI-112080 - DSD EM OS 091 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Date of Birth field is blank.	Do not allow the action	Display the error message, "Date of Birth is required when Person Type is Applicant, Recipient or Provider".
92	16074 16212	CI-112073 - DSD EM OS 092 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Gender field is blank.	Do not allow the action	Display the error message, "Gender is required when Person Type is Applicant, Recipient or Provider".
93	11956	CI-112124 - DSD EM OS 093 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Spoken Language field is blank.	Do not allow the action	Display the error message, "Spoken Language is required when Person Type is Applicant, Recipient or Provider".
94	11956 16212	CI-112094 - DSD EM OS 094 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the Person Type is Applicant, Recipient or Provider and the Written Language field is blank.	Do not allow the action	Display the error message, "Written Language is required when Person Type is Applicant, Recipient or Provider".
95			Removed with CR 919			

96			Removed			
97	11952 12273 16212	CI-112126 - DSD EM OS 097 IMPLEMENTED	Modify Phone Number	When the "Save" link is selected on the Modify Phone Number screen 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."
98	12025 16193	CI-112150 - DSD EM OS 098 IMPLEMENTED	Modify Phone Number	When the "Save" link is selected on the Modify Phone Number screen 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."
99	12025 16193	CI-112085 - DSD EM OS 099 IMPLEMENTED	Create Application	When the "Create Case" link is selected on the Create Application screen and the SSN entered is not nine (9) numeric digits.	Do not allow the action	Display the error message, "SSN must be nine numeric digits."
100	11952	CI-112168 - DSD EM OS 100 IMPLEMENTED	Create Referral	When the "Save" link is selected on the Create Referral screen and the a Phone Number (Both Area Code or Phone Numbers) are entered, but a Phone Number Type is not selected	Do not allow the action	Display the error message, "Phone Number Type is required if Area Code and Phone Number are indicated".

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (101-120)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
101	11952	CI-112135 - DSD EM OS 101 <small>IMPLEMENTED</small>	Create Application	When the Create Case link is selected on the Create Application screen and the a Phone Number (Both Area Code or Phone Numbers) are entered, but a Phone Number Type is not selected	Do not allow the action	Display the error message, "Phone Number Type is required if Area Code and Phone Number are indicated".
102	11982	CI-112112 - DSD EM OS 102 <small>IMPLEMENTED</small>	Maintain Other Address	During the address validation and standardization process, if the Unit number is invalid or missing.	Allow the action	Display the message "The Unit Number is missing or invalid for the address specified."
103	11982	CI-112141 - DSD EM OS 103 <small>IMPLEMENTED</small>	Maintain Street Address	During the address validation and standardization process, if the Unit number is invalid or missing.	Allow the action	Display the message "The Unit Number is missing or invalid for the address specified."
104	11982	CI-112143 - DSD EM OS 104 <small>IMPLEMENTED</small>	All Address Screens	During the address validation and standardization process, if the ZIP code or ZIP+4 entered is invalid.	Allow the action	Display the message "The Zip Code or Zip+4 entered is an invalid format (99999-9999)."
105	11952 12273 16212	CI-112123 - DSD EM OS 105 <small>IMPLEMENTED</small>	Modify Phone Number	When the "Save" link is selected on the Modify Phone Number screen and the original From Date was a date in the past	Do not allow the action	Display the error message "Original From Date was a past date, modification not allowed. New Phone Number record required."
106		CI-112144 - DSD EM OS 106 <small>IMPLEMENTED</small>	Cancelled by ASR Sprint 60 Team 1&2			
107	11952 12273 16212	CI-112121 - DSD EM OS 107 <small>IMPLEMENTED</small>	Create Phone Number	When the "Save" link is selected on the Create Phone Number screen and the From Date was a date prior to the current date	Do not allow the action	Display the error message "From Date cannot be a past date."
108	12310	CI-112138 - DSD EM OS 108 <small>IMPLEMENTED</small>	Modify Address	The Person record Person Type is Provider and the Effective Date is later than the current date and this is the 1st address for a Provider	Do not allow the action	Display the error message, "Effective Date may not be in the future for the initial address."
109	12026 12032	CI-112127 - DSD EM OS 109 <small>IMPLEMENTED</small>	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 100	Do not allow the action	Display the error message. "CIN does not exist for the applicant."
110	16026 12030	CI-112106 - DSD EM OS 110 <small>IMPLEMENTED</small>	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 601	Do not allow the action	Display the error message. "Comma area length problem."
111	16026 16030 16032	CI-112113 - DSD EM OS 111 <small>IMPLEMENTED</small>	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 610	Do not allow the action	Display the error message. "Client Index XREF record not found."
112	12030 16026	CI-112162 - DSD EM OS 112 <small>IMPLEMENTED</small>	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 612	Do not allow the action	Display the error message. "Program ID error with SCIMEDS."
113	16026 16030 16032	CI-112137 - DSD EM OS 113 <small>IMPLEMENTED</small>	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 614	Do not allow the action	Display the error message. "Error with MEDS System ID."
114	16026 16030 16032	CI-112096 - DSD EM OS 114 <small>IMPLEMENTED</small>	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 616	Do not allow the action	Display the error message. "Error with linking SCIMEDS."

115	16026 16030 16032	CI-112147 - DSD EM OS 115 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 620	Do not allow the action	Display the error message. "Error with CINXREF read."
116	16026 16030 16032	CI-112100 - DSD EM OS 116 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 630	Do not allow the action	Display the error message. "MEDS record not found."
117	16026 16030	CI-112082 - DSD EM OS 117 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 640	Do not allow the action	Display the error message. "Error with MEDS read."
118	16026 16030	CI-112089 - DSD EM OS 118 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 600	Do not allow the action	Display the error message. "Invalid transaction type."
119	16026 16030 16032	CI-112092 - DSD EM OS 119 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 900	Do not allow the action	Display the error message. "SCI database problem."
120	16026 16030 16032	CI-112132 - DSD EM OS 120 IMPLEMENTED	SCI - CIN Search	When user clicks the 'Eligibility' link associated with a CIN and the EL transaction response code is 999	Do not allow the action	Display the error message. "SCI system problem."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (121-140)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
121	12407 16026	↳ CI-112117 - DSD EM OS 121 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 107	Do not allow the action	Display the error message, "SCI OU - Cannot update SSN on a minor consent case."
122	12407 16026	↳ CI-112078 - DSD EM OS 122 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 707 or H07	Do not allow the action	Display the error message, "SCI OU - Application type is missing or invalid."
123	12407 16026	↳ CI-112158 - DSD EM OS 123 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 801	Do not allow the action	Display the error message, "SCI OU - Client Index Number is missing or invalid."
124	12407 16026	↳ CI-112095 - DSD EM OS 124 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 806	Do not allow the action	Display the error message, "SCI OU – Alien Number is missing or invalid."
125	12407 16026	↳ CI-112136 - DSD EM OS 125 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 810	Do not allow the action	Display the error message, "SCI OU – Gender Code is missing or invalid."
126	12407 16026	↳ CI-112161 - DSD EM OS 126 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 600	Do not allow the action	Display the error message, "Invalid transaction type."
127	12407 16026	↳ CI-112114 - DSD EM OS 127 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 900	Do not allow the action	Display the error message, "SCI database problem."
128	12407 16026	↳ CI-112107 - DSD EM OS 128 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and SCI OU returns response code 999	Do not allow the action	Display the error message, "SCI system problem."
129	16026	↳ CI-112099 - DSD EM OS 129 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 600.	Allow the action	Display the error message, "Invalid transaction type."
130	16026	↳ CI-112077 - DSD EM OS 130 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 900.	Allow the action	Display the error message, "SCI database problem."
131	16026	↳ CI-112146 - DSD EM OS 131 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 999.	Allow the action	Display the error message, "SCI system problem."
132	16026	↳ CI-112074 - DSD EM OS 132 IMPLEMENTED	SCI Search	When the "SCI Search" link is selected on the Create Case screen and no CIN is found, SCI – OI return code = 811.	Allow the action	Display the error message, "SCI OI – Last name or first name is missing."
133			Removed with CR 919			
134			Removed with CR 919			
135			Removed with CR 919			

136	12025 12581	CI-116718 - DSD EM OS 136 IMPLEMENTED	Create Application OR Alternative ID	<p>When the Create Case link is selected on the Create Application screen AND Social Security Number field is blank AND An Alternative ID Type SSN exists</p> <p>OR</p> <p>When the Save link is selected on the Alternative ID screen AND The Person Type for the individual includes Provider with Eligible = Yes OR The Person Type for the individual includes Provider with Eligible = No, where the individual has an active Cori Record with a Recipient Waiver AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN</p>	Do not allow the action	Display the error message "SSN may not be deleted. Use New Alternative ID to correct an existing SSN."
137		CI-117922 - DSD EM OS 137 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
138		CI-117923 - DSD EM OS 138 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
139		CI-117924 - DSD EM OS 139 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
140		CI-117925 - DSD EM OS 140 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (141-160)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
141	16718	CI-117926 - DSD EM OS 141 IMPLEMENTED	Create Referral	When the Save link is selected on the Create Referral screen <ul style="list-style-type: none"> and the Blank SSN Reason is "Duplicate Research" or "Applied for SSN" and the SSN field is not blank 	Do not allow the action	Display the error message, "SSN must be blank if Blank SSN Reason is indicated."
142		CI-117927 - DSD EM OS 142 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
143		CI-117928 - DSD EM OS 143 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
144		CI-117929 - DSD EM OS 144 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
145		CI-117930 - DSD EM OS 145 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
146		CI-117931 - DSD EM OS 146 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
147		CI-117932 - DSD EM OS 147 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
148		CI-117933 - DSD EM OS 148 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
149		CI-117934 - DSD EM OS 149 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
150		CI-117935 - DSD EM OS 150 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
151		CI-117936 - DSD EM OS 151 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
152		CI-117937 - DSD EM OS 152 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
153		CI-117938 - DSD EM OS 153 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
154		CI-117939 - DSD EM OS 154 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			

155		 CI-117940 - DSD EM OS 155 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
156		 CI-117941 - DSD EM OS 156 CANCELLED	Cancelled by ASR Sprint 42 Team 1&2			
157		 CI-117942 - DSD EM OS 157 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
158		 CI-117943 - DSD EM OS 158 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
159		 CI-117944 - DSD EM OS 159 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			
160		 CI-117945 - DSD EM OS 160 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2			

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (161-180)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
161		 CI-117946 - DSD EM OS 161 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
162		 CI-117947 - DSD EM OS 162 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
163		 CI-117724 - DSD EM OS 163 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
164		 CI-117725 - DSD EM OS 164 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
165		 CI-117726 - DSD EM OS 165 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
166		 CI-117727 - DSD EM OS 166 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
167		 CI-117728 - DSD EM OS 167 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
168		 CI-117729 - DSD EM OS 168 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
169		 CI-117730 - DSD EM OS 169 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
170		 CI-117731 - DSD EM OS 170 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
171		 CI-117918 - DSD EM OS 171 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
172		 CI-117917 - DSD EM OS 172 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
173		 CI-117916 - DSD EM OS 173 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
174		 CI-117919 - DSD EM OS 174 CANCELLED	Cancelled ASR Sprint 42 Team 1&2			

175		CI-118129 - DSD EM OS 175 CANCELLED	Cancelled ASR Sprint 43 Team 1&2			
176	16110 16112	CI-290395 - DSD EM OS 176 IMPLEMENTED	Create Case	When the Save link is selected on the "Create Case" screen and "IHSS Referral Date" is changed to a date future to the displayed IHSS Referral Date	Do not allow the action	Display the error message "IHSS Referral Date may not be changed to a date future to the displayed IHSS Referral Date."
177	16927	CI-434184 - DSD EM OS 177 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and an SCI search has not been performed	Do not allow the action	Display the error message, "Client Index Number search is required."
178	11993 12015	CI-437231 - DSD EM OS 178 IMPLEMENTED	Maintain Street Address	When the "Select" link is selected on the Maintain Street Address screen and a Unit Number is indicated but the Unit Type field is blank	Do not allow the action	Display the error message, "Both Unit Type and Unit Number must be indicated."
179	11993 12015	CI-437232 - DSD EM OS 179 IMPLEMENTED	Maintain Street Address	When the "Select" link is selected on the Maintain Street Address screen and a Unit Type is indicated but the Unit Number field is blank	Do not allow the action	Display the error message, "Both Unit Type and Unit Number must be indicated."
180	16937	CI-444459 - DSD EM OS 180 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID and the Type is Client Index Number and the Person is not associated with a case (Person Type is not Applicant or Recipient)	Do not allow the action	Display the error message, "Create Alternate ID Type Client Index Number is not allowed without case. Use Create Case process to perform CIN clearance."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (181-200)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
181	16937	CI-444460 - DSD EM OS 181 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID and the Type is Client Index Number and the case is in Terminated, Denied or Application Withdrawn status	Do not allow the action	Display the error message, "CIN Clearance is not allowed on case in [Status] status."
182	16937	CI-444461 - DSD EM OS 182 IMPLEMENTED	Create Alternate ID – Type Client Index Number	When the Save link is selected on the Create Alternate ID screen and the Type is Client Index Number and the Duplicates field is other than blank	Do not allow the action	Display the error message, "Duplicates field must be blank when Alternate ID Type is Client Index Number."
183	16937	CI-444462 - DSD EM OS 183 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID screen and the Type is Client Index Number and the Alternate ID field is blank and a CIN Clearance has been processed	Allow the action	Display the "Continue" link and the informational Message, "CIN not selected, Medi-Cal Eligibility Referral will be sent to SAWS."
184	16937	CI-444463 - DSD EM OS 184 IMPLEMENTED	Create Alternate ID Type – Client Index Number	When the Save link is selected on the Create Alternate ID screen and the Type is Client Index Number and the Alternate ID field is blank and a CIN Clearance has not been performed	Do not allow the action	Display the Informational Message, "CIN search must be performed before Save action is allowed."
185	16937	CI-444464 - DSD EM OS 185 IMPLEMENTED	Create Alternate ID – Type Client Index Number	When the Save link is selected on the Create Alternate ID – Type Client Index Number and the "From" date field is other than the current date	Do not allow the action	Display the error message, "From date must be the current date."
186	12032	CI-444465 - DSD EM OS 186 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen <ul style="list-style-type: none"> • and the Client Index Number field is blank • and a CIN Clearance has been performed 	Allow the action	Display the "Continue" link and the informational message, "CIN not selected, Medi-Cal Eligibility Referral will be sent to SAWS".
187	12032	CI-444466 - DSD EM OS 187 IMPLEMENTED	Statewide Client Index – CIN Search	When the CIN Search Results screen displays and a record is listed which matches the following fields on the CMIPS Person record: <ul style="list-style-type: none"> • First Name • Last Name • Date of Birth • Gender • Social Security Number, if present 	Allow the action	Display the informational message, "Valid matches were found, please review matches to obtain Medi-Cal Eligibility record. If matches are invalid select Cancel."
188		CI-444467 - DSD EM OS 188 CANCELLED	Cancelled by ASR Sprint 44 Team 1&2			
189	16937	CI-444468 - DSD EM OS 189 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the Create Alternative ID pop-up and the Type field is Client Index Number and the Alternative ID field is not blank but a Medi-Cal Eligibility record was not selected <p>Note: Client Index Number will be an alpha numeric value.</p>	Do not allow the action	Display the error message, "Save action is not allowed because indicated Alternative ID was not selected from SCI CIN Search. Please re-clear CIN and select the associated eligibility record."

190	16937	CI-444470 - DSD EM OS 190 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the Create Alternative ID pop-up and the Type field is Client Index Number and the Alternative ID field is either: <ul style="list-style-type: none">• Less than nine characters• Or is more than nine characters• Or is not eight numeric characters followed by an alpha character	Do not allow the action	Display the error message, "Client Index Number must be eight numeric characters followed by an alpha character."
191	12254	CI-445314 - DSD EM OS 191 IMPLEMENTED	Select Assessment Type	When the Save link is selected on the Select Assessment Type screen and the current case status is Terminated, Denied or Application Withdrawn	Do not allow the action	Display the error message, "New evidence may not be added to a case in Terminated, Denied or Application Withdrawn Status. Please take the appropriate Rescind or Reactivate action."
192	16943	CI-446462 - DSD EM OS 192 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the user taking the action is not assigned one of the following roles: <ul style="list-style-type: none">• CaseMgmtProvMgmt• CaseMgmtProvMgmtPayroll• CDSSProgramMgmt• ProgramMgmt	Do not allow the action	Display the error message, "You do not have sufficient privileges to view this page."
193	16943	CI-446463 - DSD EM OS 193 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and any of the following "parameters" on a record indicated as a "Duplicate" do not match one of the same parameter associated with the "Master" record: <ul style="list-style-type: none">• First Name• Middle Name• Last Name• Date of Birth• Gender	Do not allow the action	Display the error message for the erroneous record, "[parameter] on Duplicate person record does not match the Master person record". If more than one parameter does not match multiple parameters will display.
194	16943	CI-446464 - DSD EM OS 194 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record indicated as a "Duplicate" is a Person Type "Provider" the View Provider Details "Provider Status" is not Terminated	Do not allow the action	Display the error message for the erroneous record, "Duplicate Provider record associated with [case] currently has a Provider Status of "Active"". Records marked as Duplicates must be terminated from cases to allow this action. You must terminate the Provider before the merge action is allowed."
195	16943	CI-446465 - DSD EM OS 195 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record indicates as a Duplicate record is a Person Type "Applicant or Recipient" the case status is other than: <ul style="list-style-type: none">• Denied• Terminated• Application Withdrawn	Do not allow the action	Display the error message for the erroneous record, "Duplicate case Status must be Terminated, Denied or Application Withdrawn."
196	16943	CI-446466 - DSD EM OS 196 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the Social Security Number indicated is not nine (9) numeric characters	Do not allow the action	Display the error message associated with Social Security Number, "SSN must be nine numeric digits."
197	16943	CI-446467 - DSD EM OS 197 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record indicated as Master or Duplicate record and the value entered is not seven or nine numeric characters	Do not allow the action	Display the error message for the erroneous record, "Master or Duplicate entry must be either the seven digit case number or the nine digit Provider number."
198	16943	CI-446468 - DSD EM OS 198 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the seven digit (7) value entered is not found	Do not allow the action	Display the error message for the erroneous record, "Case Number does not exist"

199	16943	CI-446469 - DSD EM OS 199 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the nine digit (9) value entered is not found	Do not allow the action	Display the error message for the erroneous record, "No match found."
200	16943	CI-446470 - DSD EM OS 200 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the Master record indicated has as the most current Alternative ID Type Social Security Number a "Duplicates" field of "Duplicate SSN"	Do not allow the action	Display the error message for the erroneous record, "Master record indication not valid because it is indicated as a Duplicate SSN record. Please search all records with the indicated Social Security Number to find the current Master record and use that record as the Master. If current indication of Master Record is correct, please open an SR with the CMIPS Help Desk to have this issue resolved."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (201-220)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
201	16943	CI-446471 - DSD EM OS 201 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the Master Record is a Provider record and one or more of the Duplicate records is a case	Do not allow the action	Display the error message associated with the Master record, "A Provider may not be indicated as a Master record when any Duplicate record is a case. Please review entries and designate a case as the Master record."
202	16943	CI-446472 - DSD EM OS 202 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and the most recent Master Record Alternative ID Type Social Security Duplicates field is indicated as Suspect SSN	Do not allow the action	Display the error message, "Master record is indicated as a Suspect SSN. Suspect SSN may not be merged as Duplicate SSN."
203	16943	CI-446473 - DSD EM OS 203 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and Social Security Number entered does not match the Alternative ID type Social Security Number or Conversion Duplicate of the Master Record	Do not allow the action	Display the error message, "Social Security Number entered must match Alternative ID Type Social Security Number or Conversion Duplicate for Master Record."
204	16943	CI-446474 - DSD EM OS 204 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and a record exists with the Alternative ID Type Social Security equal to the Social Security Number listed on the screen and the record is not indicated as the Master or a Duplicate	Do not allow the action	Display the error message, "[Case Number or Provider Number] is currently the Master Record, this record must be listed as either a Duplicate or Master."
205	11976	CI-489568 - DSD EM OS 205 IMPLEMENTED	Create Referral	When the Save link is selected on the Create Referral screen and the birth date year is more than 120 years prior to the current calendar year	Do not allow the action	Display the error message, "Birth year may not be more than 120 years in the past. Please verify Date of Birth."
206	11976	CI-489569 - DSD EM OS 206 IMPLEMENTED	Create Applicant	When the Save link is selected on the Create Applicant screen and the birth date year is more than 120 years prior to the current calendar year	Do not allow the action	Display the error message, "Birth year may not be more than 120 years in the past. Please verify Date of Birth."
207	11976	CI-489570 - DSD EM OS 207 IMPLEMENTED	Modify Person	When the Save link is selected on the Modify Person screen and the birth date year is more than 120 years prior to the current calendar year	Do not allow the action	Display the error message, "Birth year may not be more than 120 years in the past. Please verify the Date of Birth."
208	20799	CI-497907 - DSD EM OS 208 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen And Person Type is Recipient And The Recipient Written Language is being updated from any language to Armenian And The Notice of Action Option is currently Audio CD	Do not allow the action	Display the message: "Notice of Action Option currently indicates Audio CD which is not available in Armenian. Please update the Notice of Action Option to other than Audio CD prior to updating the Recipient's written language to Armenian"
209	20799	CI-497908 - DSD EM OS 209 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen And Person Type is Recipient And The Recipient Written Language is being updated from any language to Cantonese And The Notice of Action Option is currently Audio CD	Do not allow the action	Display the message: "Notice of Action Option currently indicates Audio CD which is not available in Cantonese. Please update the Notice of Action Option to other than Audio CD prior to updating the Recipient's written language to Cantonese"
210	20799	CI-497909 - DSD EM OS 210 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen And Person Type is Recipient And The Recipient Written Language is being updated from any language to Mandarin And The Notice of Action Option is currently Audio CD	Do not allow the action	Display the message: "Notice of Action Option currently indicates Audio CD which is not available in Mandarin. Please update the Notice of Action Option to other than Audio CD prior to updating the Recipient's written language to Mandarin"
211			Error Message Removed with CR 1111			

212	20821	 CI-507555 - DSD EM OS 212 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND an email address indicated has more than one "@"	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
213	20821	 CI-507561 - DSD EM OS 213 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND an email address indicated has less than two (2) characters before the @	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
214	20821	 CI-507562 - DSD EM OS 214 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND an email address indicated does not contain at least one "." in the domain name	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
215	20821	 CI-507550 - DSD EM OS 215 IMPLEMENTED	Create Email Address	When the Save link is selected on the Create Email Address screen and the Begin Date is not the Current Date	Do not allow the action	Display the error message, "Begin date must be the current date."
216	20821	 CI-507557 - DSD EM OS 216 IMPLEMENTED	Modify Email Address	When the Save link is selected on the Modify Email Address screen AND the From date has been change	Do not allow the action	Display the error message "From Date cannot be modified."
217			Cancelled ASR 1287 – Sprint 33			
218			Cancelled ASR 1287 – Sprint 33			
219			Cancelled ASR 1287 – Sprint 33			
220	12667	 CI-507553 - DSD EM OS 220 IMPLEMENTED	Person Search, Person Search - Create Referral, Person Search – Create Application	When the Search link is selected and a Unit Type is indicated, but the Unit Number is blank	Do not allow the action	Display the error message, "Both the Unit Type and Unit Number are required when either is used as search criteria."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (221-240)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
221	12667	CI-507559 - DSD EM OS 221 IMPLEMENTED	Person Search, Person Search - Create Referral, Person Search – Create Application	When the Search link is selected and a Unit Number is indicated, but the Unit Type is blank	Do not allow the action	Display the error message, "Both the Unit Type and Unit Number are required when either is used as search criteria."
222	20821	CI-507560 - DSD EM OS 222 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND the email address indicated does not contain at least one character either before or after each "." in the domain name	Do not allow the action	Display the error message, "Not a valid email address. Please enter valid email address."
223			Cancelled ASR 1287 – Sprint 33			
224	20821	CI-507554 - DSD EM OS 224 IMPLEMENTED	Create Referral Create Application Create Email Address	When the Save link is selected on any of the following screens: <ul style="list-style-type: none">• Create Referral• Create Application• Create Email Address AND user name 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."
225			Cancelled ASR 1287 – Sprint 33			
226	20770	CI-706205 - DSD EM OS 226 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen AND Person Type is Recipient AND The Recipient Written Language is being updated from any language to Armenian AND The IHSS Required Forms Option is Audio CD	Do not allow the action	Display the message, "IHSS Required Forms Option currently indicates Audio CD which is not available in Armenian. Please update the IHSS Required Forms Option to other than Audio CD prior to updating the Recipient's written language to Armenian"
227	20770	CI-706206 - DSD EM OS 227 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen AND Person Type is Recipient AND The Recipient Written Language is being updated from any language to Cantonese AND The IHSS Required Forms Option is currently Audio CD	Do not allow the action	Display the message, "IHSS Required Forms Option currently indicates Audio CD which is not available in Cantonese. Please update the IHSS Required Forms Option to other than Audio CD prior to updating the Recipient's written language to Cantonese"

228	20770	CI-706207 - DSD EM OS 228 IMPLEMENTED	Edit Person Home	When the Save link is selected on the Person Home screen AND Person Type is Recipient AND The Recipient Written Language is being updated from any language to Mandarin AND The IHSS Required Forms Option is currently Audio CD	Do not allow the action	Display the message, "IHSS Required Forms Option currently indicates Audio CD which is not available in Mandarin. Please update the IHSS Required Forms Option to other than Audio CD prior to updating the Recipient's written language to Mandarin"
229	11976 21082	CI-790280 - DSD EM OS 229 CANCELLED	Cancelled by ASR Sprint 82 Team CM&AS			
230	11976 21083	CI-790281 - DSD EM OS 230 CANCELLED	Cancelled by ASR Sprint 82 Team CM&AS			
231	20821	CI-819666 - DSD EM OS 231 IMPLEMENTED	Inactivate Email Address	When the Inactive link is selected on the Email Addresses screen AND the person for that email address is registered as a User on the IHSS ESP	Do not allow the action	Display in the Inactivate Email Address e pop-up, the message, "Email address <person email address> cannot be Inactivated because <person first name last name> has an active IHSS Electronic Services Portal account."
232		Reserved by CR170 - SSR				
233		Reserved by CR170 - SSR				
234		Reserved by CR170 - SSR				
235	21254	CI-822871 - DSD EM OS 235 IMPLEMENTED	Create Alternative ID – Taxpayer ID for Provider	When the Save link is selected on the Create Alternative ID pop-up AND The Person Type is Provider ELSE IF The Person Type includes Provider and Applicant or Recipient with a Case Status of Denied, Application Withdrawn or Terminated AND The Alternative ID field is populated AND The Type = Taxpayer ID AND The Blank SSN Reason field is blank	Do not allow the action	Display the message "Taxpayer ID entry is not allowed for a Provider."
236	21254	CI-822872 - DSD EM OS 236 IMPLEMENTED	Create Alternative ID – Blank SSN Reason for Taxpayer ID	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is populated AND The Type = Taxpayer ID AND The Blank SSN Reason field = Applied for SSN	Do not allow the action	Display the message "Blank SSN Reason field must be blank for Taxpayer ID entry."

237	21254	CI-822873 - DSD EM OS 237 IMPLEMENTED	Create Alternative ID – Blank or incomplete Alternative ID for Taxpayer ID	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field is blank</p> <p>AND</p> <p>The Alternative ID field is:</p> <ul style="list-style-type: none"> • Less than (9) numeric characters • OR more than (9) numeric characters • OR contains non-numeric characters 	Do not allow the action	Display the message "Taxpayer ID must be nine (9) numeric characters."
238	21254	CI-822874 - DSD EM OS 238 IMPLEMENTED	Create Alternative ID – Blank or incomplete Alternative ID for Taxpayer ID	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field is blank</p> <p>AND</p> <p>The Alternative ID field is (9) numeric characters but begins with a number other than the number nine (9)</p>	Do not allow the action	Display the message "A valid Taxpayer ID number must begin with the number nine (9). Please enter a valid TIN."
239	21254	CI-822875 - DSD EM OS 239 IMPLEMENTED	Create Alternative ID – Duplicate Taxpayer ID	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field is blank</p> <p>AND</p> <p>The Alternative ID value entered matches an active (not end dated) Taxpayer ID on another person record in CMIPS</p>	Do not allow the action	Display the message "The entered Taxpayer ID is already associated to Case Number <case number with the active Taxpayer ID>. Please verify/correct number and re-enter."
240	21254	CI-822876 - DSD EM OS 240 IMPLEMENTED	Create Alternative ID – No CIN Clearance for Taxpayer ID	<p>When the CIN Clearance link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Type = Taxpayer ID</p>	Do not allow the action	Display the message "CIN Clearance is not allowed for a Taxpayer ID."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (241-260)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
241	21254	CI-822877 - DSD EM OS 241 IMPLEMENTED	Create Alternative ID – No Taxpayer ID if Active SSN Exists	When the Save button is selected on the Create Alternative ID pop-up AND The Alternative ID field contains (9) numeric characters AND The Type = Taxpayer ID AND The Blank SSN Reason field is blank AND The Person record has an Active (To = 12/31/9999 (high end date)) Alternative ID Type = SSN that contains a value in the Alternative ID field (not blank).	Do not allow the action	Display the message "Taxpayer ID cannot be created for a person with an existing SSN."
242	16718	CI-822883 - DSD EM OS 242 IMPLEMENTED	Create Alternative ID – No Existing SSN	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN AND There is not an existing SSN Alternative ID (not blank) for the individual	Do not allow the action	Display the error message, "There is no SSN for this individual. SSN cannot be removed."
243	16718	CI-822884 - DSD EM OS 243 IMPLEMENTED	Create Alternative ID – Blank SSN Reason Required	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field is blank	Do not allow the action	Display the error message, "A Blank SSN Reason must be selected."
244	21254	CI-822885 - DSD EM OS 244 IMPLEMENTED	Create Alternative ID – SSN Cannot Begin with '9'	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is populated with (9) numeric characters AND The Type = Social Security Number AND The Blank SSN Reason field is blank AND The number entered in the Alternative ID field begins with '9'	Do not allow the action	Display the error message, "A valid Social Security Number cannot begin with nine (9). Please enter a valid SSN."

245	16718	CI-822886 - DSD EM OS 245 IMPLEMENTED	Create Alternative ID – Comments Required When Removing SSN	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN AND The Comments field does not include any characters (cannot be only spaces)	Do not allow the action	Display the error message, "Comments are required when SSN is being removed."
246	21268	CI-822888 - DSD EM OS 246 IMPLEMENTED	Medi-Cal Eligibility Information – SCI Look-up ACCESSED FROM Create Alternative ID – CIN Clearance	When a Recipient or Applicant, where Alternative ID Type = Social Security Number for the individual has the 'Duplicates' field on the CONCERNROLEALTERNATEID table set as blank, selects the CIN Clearance link on the "Create Alternative ID" pop-up AND The indicated Alternative ID Type = Client Index Number AND The Alternative ID field is blank THEN The Eligibility link on the Statewide Client Index Search for the returned matching record where the CIN exists in CMIPS is selected	Do not allow the action	The user is taken to the Medi-Cal Eligibility Information - Home screen with no Medi-Cal information displayed where the following error message is displayed, "Person on record with indicated CIN already exists. Please resolve the conflict and perform CIN clearance again." AND A Return to CIN Select button is available.
247	21268	CI-822889 - DSD EM OS 247 IMPLEMENTED	Medi-Cal Eligibility Information – SCI Look-up ACCESSED FROM Create Case – CIN Clearance	When an Applicant, where Alternative ID Type = Social Security Number for the individual has the 'Duplicates' field on the CONCERNROLEALTERNATEID table set as blank, selects the search icon for CIN search where a CIN does not exist in CMIPS for the Applicant, but exists for another person on the Create Case screen AND Selects the CIN Clearance button THEN The Eligibility link on the Statewide Client Index Search for the returned matching record where the CIN exists in CMIPS is selected	Do not allow the action	The user is taken to the Medi-Cal Eligibility Information - Home screen with no Medi-Cal information displayed and an error message "Person record with indicated CIN already exists. Please resolve the conflict and perform CIN clearance again." AND A return to CIN Select button is available.
248	16718	CI-822913 - DSD EM OS 248 IMPLEMENTED	Create Alternative ID – Removing a Removed SSN	When the Save link is selected on the Create Alternative ID pop-up AND The Alternative ID field is blank AND The Type = Social Security Number AND The Blank SSN Reason field = Applied For SSN AND The individual does not have an active SSN in CMIPS	Do not allow the action	Display the error message, "There is no current SSN for this individual. SSN cannot be removed."
249	21283	CI-822946 - DSD EM OS 249 IMPLEMENTED	Create Alternative ID – Do Not Allow Creation of an SSN with a Single Number	When the Save button is selected on the Create Alternative ID pop-up AND The Type is selected as "Social Security Number" and the Alternative ID field contains any of the following numbers: '000000000' or '111111111' or '222222222' or '333333333' or '444444444' or '555555555' or '666666666' or '777777777' or '888888888' OR The Type is selected as "Taxpayer ID" and the Alternative ID field contains '999999999'	Do not allow the action	Display the error message, "This number is not a valid entry for this Alternative ID Type."

250	21284	CI-822953 - DSD EM OS 250 IMPLEMENTED	Create Referral Screen - Do Not Allow Creation of an SSN Beginning with '9'	When the Save button is selected on the Create Referral screen AND The entry in the "Social Security Number" field begins with a '9'	Do not allow the action	Display the error message, "A valid Social Security Number cannot begin with nine (9). Please enter a valid SSN."
251	21283	CI-822948 - DSD EM OS 251 IMPLEMENTED	Create Referral Screen - Do Not Allow Creation of an SSN with a Single Number	When the Save button is selected on the Create Referral screen AND The "Social Security Number" field contains any of the following numbers: '000000000' or '111111111' or '222222222' or '333333333' or '444444444' or '555555555' or '666666666' or '777777777' or '888888888'	Do not allow the action	Display the error message, "'<entered number>' is not a valid entry for the Social Security Number."
252	21284	CI-822952 - DSD EM OS 252 IMPLEMENTED	Create Application Screen - Do Not Allow Creation of an SSN Beginning with '9'	When the Create Case button is selected on the Create Application screen AND The entry in the "Social Security Number" field begins with a '9'	Do not allow the action	Display the error message, "A valid Social Security Number cannot begin with nine (9). Please enter a valid SSN."
253	21283	CI-822949 - DSD EM OS 253 IMPLEMENTED	Create Application Screen - Do Not Allow Creation of an SSN with a Single Number	When the Create Case button is selected on the Create Application screen AND The "Social Security Number" field contains any of the following numbers: '000000000' or '111111111' or '222222222' or '333333333' or '444444444' or '555555555' or '666666666' or '777777777' or '888888888'	Do not allow the action	Display the error message, "'<entered number>' is not a valid entry for the Social Security Number."
254	16212	CI-823063 - DSD EM OS 254 IMPLEMENTED	Create Phone Number Screen - Do Not Allow Multiple Phone Types as Primary OR Modify Phone Number Screen - Do Not Allow Multiple Phone Types as Primary	When a user edits or adds a new phone number of the same type on the Create Phone Number and Modify Phone Number screen AND Does not indicate that phone type as primary.	Do not allow the action	Display the error message, "Primary number required. Please choose a different phone type as primary to update this one."
255	11956	CI-823079 - DSD EM OS 255 IMPLEMENTED	Do Not Allow Special and Numeric Characters on Other Written Language Details Field	When the user attempts to save a special and/or numeric character in the Other Written Language Details field on Modify Person screen OR Person Home – Provider screen OR Create Referral screen OR Create Provider screen OR Create Application screen	Do not allow the action	Display the error message, "Other Written Language Details field allows only English language alpha characters"
256	11956	CI-823080 - DSD EM OS 256 IMPLEMENTED	Do Not Allow Special and Numeric Characters on Other Spoken Language Details Field	When the user attempts to save a special and/or numeric character in the Other Spoken Language Details field on Modify Person screen OR Person Home – Provider screen OR Create Referral screen OR Create Provider screen OR Create Application screen	Do not allow the action	Display the error message, "Other Spoken Language Details field allows only English language alpha characters."
257	11982	CI-823347 - DSD EM OS 257 IMPLEMENTED	Maintain General Delivery Address	During the address validation and standardization process on the Maintain General Delivery Address screen, no matching addresses could be found	Allow the action	Display the message, "The address entered cannot be matched to a USPS address."
258	21375	CI-823575 - DSD EM OS 258 IMPLEMENTED	Create Message Pop-Up - Reminder Date not valid	When the user clicks the Preview button on the Create Message Pop-Up screen AND Date entered is not in MM/DD/YYYY format	Do not allow the action	Display the error message, "The field 'Action Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<13/30/2023>'."

259	21375	 CI-823576 - DSD EM OS 259 IMPLEMENTED	Create Message Pop-Up - Reminder Date Required for Selected Subject	<p>When the user clicks the Preview button on the Create Message Pop-Up screen</p> <p>AND</p> <p>The selected message type requires a date</p> <p>AND</p> <p>The Action Date field was not selected</p>	Do not allow the action	Display the error message, "Action Date required for the selected Subject."
260	21375	 CI-823577 - DSD EM OS 260 IMPLEMENTED	Create Message Pop-Up - Reminder Date selected has passed	<p>When the user clicks the Preview button on the Create Message Pop-Up screen</p> <p>AND</p> <p>The selected message type requires a date</p> <p>AND</p> <p>The Action Date field was selected for a past date</p>	Do not allow the action	Display the error message, "Action Date must be the current or a future date."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Error Messages (261-280)

No	Req ID	CI	Screen Name or User Action	Condition	Action	Error
261	21375	CI-823578 - DSD EM OS 261 IMPLEMENTED	Create Message Pop-Up - User not Registered /Inactive	When the user clicks the Send button or Send & New button on the Create Message Pop-Up screen AND The user is not registered to ESP OR Their ESP registration status is Inactive	Do not allow the action	Display the error message, "This user is not registered to the ESP. Message not sent."
262	21375	CI-823579 - DSD EM OS 262 IMPLEMENTED	Create Message Pop-Up - Form Name not selected	When the user clicks the Preview button on the Create Message Pop-Up screen AND The selected message type requires a form name AND The Form Name field was not selected	Do not allow the action	Display the error message, "Form Name required for the selected Subject."
263	21375	CI-823600 - DSD EM OS 263 IMPLEMENTED	Create Message Pop-Up - Form Name not allowed	When the user clicks the Preview button on the Create Message Pop-Up screen AND The selected Subject type does not require a form name AND A Form Name was selected	Do not allow the action	Display the error message, "Form Name is not allowed for the selected Subject."
264	12650	CI-823463 - DSD EM OS 264 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, Person Search - Application screen AND Area code entered is not three numeric digits	Do not allow the action	Display the error message, "Area Code must be three numeric digits."
265	12650	CI-823464 - DSD EM OS 265 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen AND Phone number entered is not seven numeric digits	Do not allow the action	Display the error message, "Phone Number must be seven numeric digits."
266	12650	CI-823465 - DSD EM OS 266 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen AND Three digit Area Code is entered but Phone Number is blank OR Area Code is blank but seven digit Phone Number is entered	Do not allow the action	Display the error message, "Phone number must be entered."

267	12650	CI-823466 - DSD EM OS 267 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen 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."
268	12650	CI-823728 - DSD EM OS 268 IMPLEMENTED	Person Search, Person Search - Referral, Person Search - Application	When the user clicks the Search button on the Person Search, Person Search - Referral, or Person Search - Application screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
269	11952 12273	CI-823730 - DSD EM OS 269 IMPLEMENTED	Create Referral, Modify Phone Number	When the user clicks the Save button on the Create Referral or Modify Phone Number screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
270	12273	CI-823731 - DSD EM OS 270 IMPLEMENTED	Create Phone Number	When the user clicks the Save or Save & New button on the Create Phone Number screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
271	11976	CI-823732 - DSD EM OS 271 IMPLEMENTED	Create Application	When the user clicks the Create Case button on the Create Application screen AND The phone number entry is 000 0000000 or 999 9999999	Do not allow the action	Display the error message, "Not a valid phone number. Please enter valid phone number."
272	16218	CI-823783 - DSD EM OS 272 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up with no data in the 'Creation To Date' Field	Do not allow the action	Display the error message, "Creation To Date' must be entered."
273	16218	CI-823784 - DSD EM OS 273 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up with no data in the 'Creation From Date' Field	Do not allow the action	Display the error message, "Creation From Date' must be entered."
274	16218	CI-823785 - DSD EM OS 274 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up AND The data in the 'Creation To Date' field display in a format that is not MM/DD/YYYY (date format can be M/DD/YYYY, M/D/YYYY, or MM/D/YYYY)	Do not allow the action	Display the error message, "The field 'Creation To Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<what the user entered>'."
275	16218	CI-823786 - DSD EM OS 275 IMPLEMENTED	Print Person Notes Form Pop-Up	When the user attempts to save the Print Person Notes Form Pop-Up AND The data in the 'Creation From Date' field display in a format that is not MM/DD/YYYY (date format can be M/DD/YYYY, M/D/YYYY, or MM/D/YYYY)	Do not allow the action	Display the error message, "The field 'Creation From Date' is not valid. A date must be in the format 'MM/dd/yyyy', you have entered '<what the user entered>'."

276	21383	CI-823991 - DSD EM OS 276 IMPLEMENTED	Update Email Address - User enters an invalid Verification Code Selects the Verify button	When the user enters an invalid Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message: "Invalid verification code, please enter a valid verification code."
277	21383	CI-823992 - DSD EM OS 277 IMPLEMENTED	Update Email Address - User enters an expired Verification Code Selects the Verify button	When the user enters an expired Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message: "Verification code expired, please select "Resend Code" to receive a new one."
278	21383	CI-823993 - DSD EM OS 278 IMPLEMENTED	Update Email Address - User enters a blocked Verification Code Selects the Verify button	When the user enters a blocked Verification Code AND Selects the Verify button	Do not allow the action	Display the warning message: "The verification code is blocked since you've entered an incorrect verification code more than 5 times. Please select "Resend Code" to receive a new one."
279	12667	CI-824449 - DSD EM OS 279 IMPLEMENTED	Person Search - Search by Last 4 SSN and All SSN	When the user doesn't select "Last 4 SSN" checkbox AND selects "All SSN" checkbox	Do not allow the action	Display the error message, "You must enter only last four digits when "Last 4 SSN" option is checked."
280	12667	CI-824450 - DSD EM OS 280 IMPLEMENTED	Person Search - Search by Last 4 SSN	When the user select "Last 4 SSN" checkbox AND doesn't select "All SSN" checkbox AND does not enter 4-digit number	Do not allow the action	Display the error message, "You must enter only last four digits when "Last 4 SSN" option is checked."

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules

The following business rules apply to Referral/Intake process:

- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (1-10)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (11-20)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (21-30)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (31-40)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (41-50)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (51-60)
- DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (61-70)

No	Req ID	CI	Description	When	Action
1	12063	CI-111369 - DSD BR OS 01 IMPLEMENTED	CIN Selection	When CIN is selected from SCI during Case creation process	CMIPS will save MEDS information associated with the OM Transaction (Medi-Cal Eligibility transaction)
2	12650 12653	CI-111370 - DSD BR OS 02 IMPLEMENTED	Person Search	When the Search button is selected: <ul style="list-style-type: none"> • SSN is entered • CIN is or is not entered • Provider Number is or is not entered • Full or partial last name is or is not entered • Complete address is or is not entered • Other search criteria are or are not entered. 	The search will be executed. Only the SSN is used as the search criteria and other entered search criteria will be ignored. The value that matches the SSN entered will display.
3	12650 12653	CI-111371 - DSD BR OS 03 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none"> • SSN is not entered • CIN is entered • Provider Number is or is not entered • Full or partial last name is or is not entered • Complete address is or is not entered • Other search criteria are or are not entered. 	The search will perform. Only CIN is used as the search criteria and other entered search criteria will be ignored.
4	12650 12653	CI-111372 - DSD BR OS 04 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none"> • SSN is not entered • CIN is not entered • Provider Number is not entered • Full or partial last name is or is not entered • Complete address is or is not entered • Other search criteria are or are not entered. 	The search will perform. All search criteria (address and other search criteria) will be used together to do the search.
5	12650 12653	CI-111373 - DSD BR OS 05 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none"> • SSN is not entered • CIN is not entered • Provider Number is not entered • Full or partial last name is not entered and last name has at least two characters • Complete or incomplete address is entered • Other search criteria are or are not entered. 	The search will perform. All search criteria (address and other search criteria) will be used together to do the search.
6	12025	CI-111374 - DSD BR OS 06 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the Create Alternative ID screen <ul style="list-style-type: none"> • and the Type is Social Security Number • and the Alternative ID field is not blank • and the associated Person Record has "Blank SSN Reason" of Applied for SSN 	Allow the save action and reset the Person Home "Blank SSN Reason" field to "blank."
7	12273	CI-111375 - DSD BR OS 07 IMPLEMENTED	Create Phone Number	When the Save link is selected on the "Create Phone Number" screen and "Primary" is indicated and another "Phone Number" indicates "Primary"	<ul style="list-style-type: none"> • Indicate the current record as "Primary" • Deselect "Primary" on the previous "Phone Number" record

8	12273	CI-111376 - DSD BR OS 08 <small>IMPLEMENTED</small>	Modify Phone Number	When the Save link is selected on the "Modify Phone Number" screen and "Primary" is indicated and an existing "Phone Number" screen indicates "Primary"	<ul style="list-style-type: none"> Indicate the current record as "Primary" Deselect "Primary" on the previous "Phone Number" record
9	11989	CI-111377 - DSD BR OS 09 <small>IMPLEMENTED</small>	SAWS Send	When the Save link is selected on the "Create Case" screen for a Recipient with either no Medi-Cal or without active Medi-Cal. <ul style="list-style-type: none"> No Medi-Cal is determined as follows: If the SCI OI response return code = 100 (No match found). Without active Medi-Cal is determined as follows: The Medi-Cal eligibility status in the SCI OM response contains a 9 in both the first and third digits. 	Send SAWS S1 (CMSD4XXB) "IHSS Referral for Medi-Cal determination"
10	12263	CI-111378 - DSD BR OS 10 <small>IMPLEMENTED</small>	SAWS Receive	When S2 transaction is received from SAWS in response to S1 transaction AND The CIN received does not match the CIN on the Person record AND The CIN received does not match a CIN on another Person record in CMIPS	<ul style="list-style-type: none"> Update the CIN on the Person record Perform CIN re-clearance and Medi-Cal Eligibility selection Send MEDS IH18 (CMDS103C) – Pending Application

No	Req ID	CI	Description	When	Action
11	16052	CI-111379 - DSD BR OS 11 <small>IMPLEMENTED</small>	Update to applicant's demographic data	When there is an update to the IHSS applicant's demographic data <ul style="list-style-type: none"> When the Save link is selected on the "Modify Person" screen. When the "Change" link is selected on the "Case Home" screen. When the Save link is selected on the "Modify Phone Number" screen. When the link in "Action" column is selected on the "Maintain Street Address" screen. When the link in "Action" column is selected on the "Maintain PO Box Address" screen. When the link in "Action" column is selected on the "Maintain Rural Route Address" screen. When the link in "Action" column is selected on the "Maintain General Delivery Address" screen. When the link in "Action" column is selected on the "Maintain Highway Address" screen. When the link in "Action" column is selected on the "Maintain Other Address" screen. 	Send MEDS IH12 (CMDS103C) – Update Client Information
12	16052	CI-111380 - DSD BR OS 12 <small>IMPLEMENTED</small>	IHSS application is denied	When a case status changes from Pending to Denied	Send MEDS IH34 (CMDS103C) – Update Application Data
13	16052	CI-111381 - DSD BR OS 13 <small>IMPLEMENTED</small>	IHSS application created	When the Save link is selected on the "Create Case" screen and the CIN selected has active Medi-Cal: <ul style="list-style-type: none"> Active Medi-Cal - Any Medi-Cal eligibility status in the SCI OM response contains other than a 9 in both the first and third digits. 	Send MEDS IH18 (CMDS103C) – Pending Application
14	12047	CI-111382 - DSD BR OS 14 <small>IMPLEMENTED</small>	Modify Person	When the Save link is selected on the Modify Person screen and any of the following fields have been modified: <ul style="list-style-type: none"> Last Name First Name Middle Initial Date of Birth Gender 	Send OU transaction to SCI
15		CI-111383 - DSD BR OS 15 <small>CANCELLED</small>	Cancelled by ASR Sprint 43 Team 1&2		
16	11989	CI-111384 - DSD BR OS 16 <small>IMPLEMENTED</small>	SAWS Send	When the Save link is selected on the "Create Case" screen for a Recipient with active Medi-Cal: <ul style="list-style-type: none"> Active Medi-Cal is determined when the Medi-Cal eligibility status in the SCI OM response contains other than a nine (9) in both the first and third digits and the Medi-Cal Aid Codes is other than 10, 20 or 60. 	Send S8 (SMDS4XXB) Notification of IHSS "Pending" status
17	11952	CI-111385 - DSD BR OS 17 <small>IMPLEMENTED</small>	Create Referral	When the Save link is selected on the Create Referral screen and the current record has a Person Type of Provider	Add and display second Person Type of Open Referral

18	11953	CI-111386 - DSD BR OS 18 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and the current record has a Person Type of Provider	Add and display the second Person Type of Applicant
19	11953	CI-111387 - DSD BR OS 19 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and the current record has a Person Type of Open Referral	Update the Open Referral Person Type to Applicant
20	12650 12653	CI-116760 - DSD BR OS 20 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none">• SSN is not entered• CIN is not entered• Provider Number is entered• Full or partial last name is or is not entered and last name has at least two (2) characters• Complete or incomplete address is not entered• Other search criteria are or are not entered.	The search will perform. Only the Provider Number is used as the search criteria and other entered search criteria will be ignored.

No	Req ID	CI	Description	When	Action
21	16719	CI-117715 - DSD BR OS 21 IMPLEMENTED	Create Alternative ID – Type SSN	When the Save link is selected on the Create Alternative ID screen and the Type is Social Security Number <ul style="list-style-type: none">• and the Duplicate field is indicated as Duplicate SSN	Set the Person record Duplicate field to "Duplicate SSN".
22	16720	CI-117716 - DSD BR OS 22 IMPLEMENTED	Create Alternative ID – Type SSN	When the Save link is selected on the Create Alternative ID screen <ul style="list-style-type: none">• and the Type is Social Security Number• and the Duplicate field is indicated as Suspect SSN	Set the Person record Duplicate field to Suspect SSN. The indicated SSN shall be "released" Released SSN – This action will allow the Alternative ID – Type SSN indication to be used as the SSN on another Person record. If the associated Person record is a Type Provider all Provider/Recipient relationships must be terminated. If the associated Person record is a Type Applicant or Recipient the associated case must be "Withdrawn, Denied or Terminated." This record will display when CMIPS is search by SSN, but no further action will be allowed against this person record. Payroll activity will occur until the record was inactivated (Terminated). for use in the CMIPS application.
23		CI-117717 - DSD BR OS 23 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
24		CI-117718 - DSD BR OS 24 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
25		CI-117719 - DSD BR OS 25 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
26		CI-117720 - DSD BR OS 26 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
27		CI-117721 - DSD BR OS 27 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		

28	16829	 CI-116761 - DSD BR OS 28 IMPLEMENTED	Create Referral - Display Name in All Uppercase Letters	When the Save link is selected on the Create Referral screen and lowercase letters were used when entering the following fields: <ul style="list-style-type: none">• Last Name• First Name• Middle Name	Display the First Name, Last Name and Middle Name entries in all uppercase letters on the Person Home screen.
29	16829	 CI-116762 - DSD BR OS 29 IMPLEMENTED	Create Application - Display Name in All Uppercase Letters	When the Save link is selected on the Create Applicant screen and lowercase letters were used when entering the following fields: <ul style="list-style-type: none">• Last Name• First Name• Middle Name	Display the First Name, Last Name and Middle Name entries in all uppercase letters on the Person Home screen.
30	16829	 CI-116763 - DSD BR OS 30 IMPLEMENTED	Modify Person - Display Name in All Uppercase Letters	When the Save link is selected on the Modify Person screen and any of the following fields were modified using lowercase letters: <ul style="list-style-type: none">• Last Name• First Name• Middle Name	Display the First Name, Last Name and Middle Name entries in all uppercase letters on the Person Home screen.

No	Req ID	CI	Description	When	Action
31	16937	 CI-444453 - DSD BR OS 31 IMPLEMENTED	Create Alternate ID	When the Create Alternate ID screen displays	Set the "From" field to the current date
32	16937	 CI-444454 - DSD BR OS 32 IMPLEMENTED	SCI CIN Search – CIN on Case (Create Case, Reactivate Case or Create Alternative ID Type)	When a CIN Clearance is processed and an Alternate ID Type Client Index Number is indicated	If Medi-Cal Pseudo field is not checked send Client Index Number, First Name, Last Name, Date of Birth, Gender and Social Security Number if present as Statewide Client Index search criteria If Medi-Cal Pseudo field is checked send Client Index Number, First Name, Last Name, Date of Birth, and Gender if present as Statewide Client Index search criteria Notes: If Client Index Number is more than nine (9) characters send only the first nine (9) characters only Client Index Number may be alpha numeric value.
33	16937	 CI-444455 - DSD BR OS 33 IMPLEMENTED	SCI CIN Search – No CIN or SSN on Case (Create Case, Reactivate Case or Create Alternative ID Type)	When a CIN Clearance is processed and neither an Alternate ID Type Client Index Number nor is an Alternate ID Type Social Security Number indicated	Send Person First Name, Last Name, Date of Birth, and Gender as Statewide Client Index search criteria

34		Merge Duplicate SSN	When the Verify link is selected on the Merge Duplicate SSN screen and no errors are encountered	Change the Verify link to "Save".	
35		Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and <ul style="list-style-type: none"> • The Master Record has an Alternative ID Type of Conversion Duplicate • And the Person Type is Applicant or Recipient and the current case status is Pending, Eligible, Presumptive Eligible or Leave • And any of the records indicated as a "Duplicate" has an Alternative ID Type of Social Security Number and the Duplicates field is blank • And the Person Type is Applicant or Recipient and the current Case Status is <ul style="list-style-type: none"> ◦ Application Withdrawn ◦ Or Terminated ◦ Or Denied 	Change the Verify link to "Save" <ul style="list-style-type: none"> • Allow the user to select the "Make Master" check box • Display the informational message, "[Case Number]" is currently a Master record. If you are sure you want the currently indicated case [Master Record Case] to be indicated as the Master Record, select the "Make Master" checkbox. <p style="margin-left: 40px;">*The "Case Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)</p>	
36		Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and <ul style="list-style-type: none"> • The Master Record has an Alternative ID Type of Conversion Duplicate • And the Person Type is Provider and the current Provider Status is Active • And any one of the records indicated as a Duplicate has an Alternative ID Type of Social Security Number and the Duplicates field is blank • And the Person Type is Provider and the current View Provider Details Provider Status is "Terminated" 	Change the Verify link to "Save" <ul style="list-style-type: none"> • Allow the user to select the "Make Master" check box • Display the informational message, "[Provider Number**]" is currently a Master record. If you are sure you want the currently indicated Provider record [Master Record Provider Number] to be indicated as the Master Record, select the "Make Master" checkbox. <p style="margin-left: 40px;">**The "Provider Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)</p>	
37		Merge Duplicate SSN	When the Save link is selected on the Merge Duplicate SSN screen	Update Alternative ID Type Social Security Number: <ul style="list-style-type: none"> • If the current Alternative ID Type of Social Security Number does not exist for the Master Record, add an Alternative ID Type of Social Security Number with the following entry <ul style="list-style-type: none"> Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen Type Social Security Number Set Duplicates field to blank If Blank SSN Reason is indicated, clear the field For all records indicated as Duplicate SSN create an Alternative ID and populate as follows: • Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen • Type Social Security Number • Set Duplicates field to Duplicate SSN • If Blank SSN Reason is indicated, clear the field • In the Alternative ID Type Comment field enter "[User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable record." • If record being merged is a CMIPS case, <p style="margin-left: 40px;">Clear the current County Use field Populate the County Use field on the Case home with the comment "[Current Date] [User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable case."</p>	
38	16943		Merge Duplicate SSN	When the Verify link is selected on the Merge Duplicate SSN screen and no errors are encountered	Change the Verify link to "Save".

39	16943	CI-446651 - DSD BR OS 39 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and <ul style="list-style-type: none"> • The Master Record has an Alternative ID Type of Conversion Duplicate • And the Person Type is Applicant or Recipient and the current case status is Pending, Eligible, Presumptive Eligible or Leave • And any of the records indicated as a "Duplicate" has an Alternative ID Type of Social Security Number and the Duplicates field is blank • And the Person Type is Applicant or Recipient and the current Case Status is <ul style="list-style-type: none"> ◦ Application Withdrawn ◦ Or Terminated ◦ Or Denied 	Change the Verify link to "Save" <ul style="list-style-type: none"> • Allow the user to select the "Make Master" check box • Display the informational message, "[Case Number]" is currently a Master record. If you are sure you want the currently indicated case [Master Record Case] to be indicated as the Master Record, select the "Make Master" checkbox. **The "Case Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)
40	16943	CI-446652 - DSD BR OS 40 IMPLEMENTED	Merge Duplicate SSN	When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and <ul style="list-style-type: none"> • The Master Record has an Alternative ID Type of Conversion Duplicate • And the Person Type is Provider and the current Provider Status is Active • And anyone of the records indicated as a Duplicate has an Alternative ID Type of Social Security Number and the Duplicates field is blank • And the Person Type is Provider and the current View Provider Details Provider Status is "Terminated" 	Change the Verify link to "Save" <ul style="list-style-type: none"> • Allow the user to select the "Make Master" check box • Display the informational message, "[Provider Number**]" is currently a Master record. If you are sure you want the currently indicated Provider record [Master Record Provider Number] to be indicated as the Master Record, select the "Make Master" checkbox. **The "Provider Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)

No	Req ID	CI	Description	When	Action
41	16943	CI-446653 - DSD BR OS 41 IMPLEMENTED	Merge Duplicate SSN	When the Save link is selected on the Merge Duplicate SSN screen	<p>Update Alternative ID Type Social Security Number:</p> <ul style="list-style-type: none"> • If the current Alternative ID Type of Social Security Number does not exist for the Master Record, add an Alternative ID Type of Social Security Number with the following entry • Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen • Type Social Security Number <ul style="list-style-type: none"> ◦ Set Duplicates field to blank ◦ If Blank SSN Reason is indicated, clear the field • For all records indicated as Duplicate SSN create an Alternative ID and populate as follows: <ul style="list-style-type: none"> ◦ Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen ◦ Type Social Security Number ◦ Set Duplicates field to Duplicate SSN ◦ If Blank SSN Reason is indicated, clear the field ◦ In the Alternative ID Type Comment field enter "[User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable record." • If record being merged is a CMIPS case, <ul style="list-style-type: none"> ◦ Clear the Current County Use field ◦ Populate the County Use field on the Case home with the comment "[Current Date] [User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable case."
42	16974	CI-463579 - DSD BR OS 42 IMPLEMENTED	Re-open Closed Referral	When the Save link is selected on the Re-open Referral screen and the current record has a Person Type of Closed Referral	<ul style="list-style-type: none"> • Update Person Type to Open Referral • Update the Person Home County to the County associated to the user taking the Re-open action • Update Referral Date to the current date • Update Referral Source to the indicated Referral Source
43			Business Rule Removed with CR 1183		

44	16110 20821	CI-507583 - DSD BR OS 44 IMPLEMENTED	Create Application	When the Create Case link is selected on the Create Application screen AND Any of the following have been updated: <ul style="list-style-type: none">• Residence Address• Mailing Address• Phone Number• Email Address	Allow the save action and create a new record in the appropriate Person Contact and set the From Date to the current date
45	16110 20821	CI-507584 - DSD BR OS 45 IMPLEMENTED	Create Case – Update Person Contact "From Date"	When the Save link is selected on the Create Case screen and the IHSS Referral Date has been modified AND Any of the following Person Contact records exist: <ul style="list-style-type: none">• Residence Address• Mailing Address• Phone Number• Email Address	Update the From Date on all existing Person Contacts to the IHSS Referral Date
46	20821	CI-507582 - DSD BR OS 46 IMPLEMENTED	Create Email Address	When the Save link is selected on the Create Email Address Screen	<p>Save the new email address record with:</p> <ul style="list-style-type: none">• Begin Date as Current Date• Status as Active• End Date as blank <p>IF An active email address record currently exists AND The Begin Date on that record is not the current date</p> <ul style="list-style-type: none">• Set the End Date of the current active email address to current date - 1• Set the status of the current active email address to "Inactive" <p>ELSE IF An active email address record currently exists AND The Begin Date on that record is the current date</p> <ul style="list-style-type: none">• Set the End Date of the current active email address to Current Date• Set the status of the current active email address to "Inactive" <p>AND IF The person is registered to the IHSS Website THEN ALSO Send AMQP modifyEmail to the CMIPS Message Broker</p> <p>AND IF Recipient with an E-Timesheet Option of "IHSS Website" OR Provider with an E-Timesheet Status of "Enrolled" or "Request Pending" THEN ALSO Generate Notification of Email Address Change (ETSE21) addressed to the old email address and to the new email address, and include the date of change</p>
47		CI-754675 - DSD BR OS 47 CANCELLED	Cancelled by ASR 1287 – Sprint 33		
48	20821	CI-819669 - DSD BR OS 48 IMPLEMENTED	Inactivate Email Address	When the Yes link is selected on the Inactivate Email Address screen	<ul style="list-style-type: none">• Save the record with the current date as the End Date• Set the status of the email address record to Inactive
49	20799	CI-822328 - DSD BR OS 49 IMPLEMENTED	Modify Person – Written Language	When the Recipient's Written Language is updated to English AND The Blind or Visually Impaired Notice of Action Option is one of the following: <ul style="list-style-type: none">• Large Font• Audio CD• Data CD	Update the Blind or Visually Impaired Notice of Action Option Language to English
50	20799	CI-822329 - DSD BR OS 50 IMPLEMENTED	Modify Person – Written Language	When the Recipient's Written Language is updated to Spanish AND The Blind or Visually Impaired Notice of Action Option is one of the following: <ul style="list-style-type: none">• Large Font• Audio CD• Data CD	Update the Blind or Visually Impaired Notice of Action Option Language to Spanish

No	Req ID	CI	Description	When	Action
51	20799	CI-822400 - DSD BR OS 51 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to one of the following:</p> <ul style="list-style-type: none"> • Cantonese • Mandarin <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to Chinese.
52	20799	CI-822401 - DSD BR OS 52 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to Armenian</p> <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to Armenian.
53	20799	CI-822402 - DSD BR OS 53 IMPLEMENTED	Modify Person – Written Language	<p>The Recipient's Written Language is updated to a non-threshold language</p> <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	The Blind or Visually Impaired Notice of Action Option Language will be updated to or remain English.
54	20799	CI-822403 - DSD BR OS 54 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to anything other than one of the following:</p> <ul style="list-style-type: none"> • English • Spanish • Cantonese • Mandarin • Armenian <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to English.
55	20799	CI-822404 - DSD BR OS 55 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to English</p> <p>AND</p> <p>The Blind or Visually Impaired IHSS Required Forms Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	Update the Blind or Visually Impaired IHSS Required Forms Option Language to English.
56	20799	CI-822405 - DSD BR OS 56 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to Spanish</p> <p>AND</p> <p>The Blind or Visually Impaired IHSS Required Forms Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	Update the Blind or Visually Impaired IHSS Required Forms Option Language to Spanish.

57	20799	CI-822406 - DSD BR OS 57 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to one of the following:</p> <ul style="list-style-type: none"> • Cantonese • Mandarin <p>AND</p> <p>The Blind or Visually Impaired IHSS Required Forms Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to Chinese.
58	20799	CI-822407 - DSD BR OS 58 IMPLEMENTED	Modify Person – Written Language	<p>The Recipient's Written Language is updated to Armenian</p> <p>AND</p> <p>The Blind or Visually Impaired IHSS Required Forms Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired IHSS Required Forms Option Language to Armenian.
59	20799	CI-822408 - DSD BR OS 59 IMPLEMENTED	Modify Person – Written Language	<p>The Recipient's Written Language is updated to a non-threshold language</p> <p>AND</p> <p>The Blind or Visually Impaired IHSS Required Forms Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	The Blind or Visually Impaired IHSS Required Forms Option will be updated to or remain English.
60	20799	CI-822409 - DSD BR OS 60 IMPLEMENTED	Modify Person – Written Language	<p>The Recipient's Written Language is updated to anything other than one of the following:</p> <ul style="list-style-type: none"> • English • Spanish • Cantonese • Mandarin • Armenian <p>AND</p> <p>The Blind or Visually Impaired IHSS Required Forms Option is:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired IHSS Required Forms Option Language to English.

No	Req ID	CI	Description	When	Action
61	21023	CI-822469 - DSD BR OS 61 IMPLEMENTED	Update IHSS ESP Written Language	<p>The "Written Language" for a Recipient or Provider is successfully updated AND IF</p> <p>The person is registered to the IHSS Website</p>	THEN Send AMQP modifyWrittenLanguage (IWOM885C) web service to the CMIPS Message Broker to update ESP written language
62		CI-822588 - DSD BR OS 62 CANCELLED	Cancelled by CR170		
63		CI-822589 - DSD BR OS 63 CANCELLED	Cancelled by CR170		
64		CI-822603 - DSD BR OS 64 CANCELLED	Cancelled by CR170		

65	21254	CI-822880 - DSD BR OS 65 IMPLEMENTED	Create Alternative ID – Add Taxpayer ID for Recipient	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Person Type is Applicant</p> <p>OR</p> <p>The Person Type is Recipient</p> <p>OR IF</p> <p>The Person Type includes Provider with Eligible = Yes</p> <p>AND</p> <p>The Case Status is Pending, Eligible, Presumptive Eligible or On-Leave</p> <p>AND</p> <p>The Alternative ID field is populated</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field is blank</p> <p>AND</p> <p>No errors are encountered</p>	<p>Save is successful</p> <p>AND</p> <p>If there is an existing Alternative ID record with Type = Taxpayer ID, then set 'To' date on the existing record to the day prior to current date.</p> <p>AND</p> <p>Create new Alternative ID record:</p> <ul style="list-style-type: none"> Set 'Alternative ID' to the entered value Set Type = Taxpayer ID Set 'From' date as current system date ('To' date = 12/31 /9999 (high end date)) Set Blank SSN Reason as blank Capture the username for Changed By Save the Comments <p>AND</p> <p>The Create Alternative ID pop-up is closed, and the user is returned to the Alternative IDs list screen.</p> <p>Note: Web service to Advantage is not invoked.</p>
66	16718	CI-822894 - DSD BR OS 66 IMPLEMENTED	Create Alternative ID – Remove SSN	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Alternative ID field is blank</p> <p>AND</p> <p>The Type = Social Security Number</p> <p>AND</p> <p>The Blank SSN Reason = Applied For SSN</p> <p>AND</p> <p>No errors are encountered</p>	<p>CM:</p> <p>Save is successful</p> <p>For the existing Alternative ID record with Type = Social Security Number</p> <ul style="list-style-type: none"> Set 'To' date to the day prior to current date <p>Create new Alternative ID record:</p> <ul style="list-style-type: none"> Set 'Alternative ID' to blank (NULL) Set Type = Social Security Number Set 'From' date as current system date Set Blank SSN Reason to 'Applied For SSN' Capture the username for Changed By Save the Comments <p>The Create Alternative ID pop-up is closed, and the user is returned to the Alternative IDs list screen.</p> <p>Webservice (PROO923A) to Advantage with blank SSN and Blank SSN Reason</p> <p>ADV:</p> <p>Process and apply SSN update to remove SSN and indicate Blank SSN Reason as Applied For SSN.</p>
67	16212 12273 12314 12315	CI-823015 - DSD BR OS 67 IMPLEMENTED	Addresses - Update Address	<p>When the Save link is selected on the Create Address pop-up</p> <p>AND</p> <p>No errors are encountered</p>	<p>Save is successful</p> <p>AND</p> <p>The new address "From" date is set to the current date</p> <p>AND</p> <p>The new address "To" date is set to blank</p> <p>AND</p> <p>The old address "To" date is set to the date prior to the current date</p> <p>AND</p> <p>If the address is a Recipient's Residential address, it is marked as pending in GeocodeAddressTrigger table.</p>

68	16218 16957	CI-823806 - DSD BR OS 68 IMPLEMENTED	Print Person Notes Form - Generate Person Notes File via Nightly Batch	When a user selects the Save button on the Print Person Notes Form screen AND The Print type = Print in Nightly Batch AND The person type is Provider	Case Management creates a new record on the Provider Forms screen that displays the following data: <ul style="list-style-type: none">• Action - Displays View and Edit links• Name - Displays Person Notes• Language - Displays English• Status - Displays Pending• Date Time - Display the date and time the record is created in the system Note: When a person is both a provider and a recipient - Recipient ID on the PDF file will take precedent. Provider ID is blank.
69	16218 16957	CI-823822 - DSD BR OS 69 IMPLEMENTED	Print Person Notes Form - Generate Person Notes File on Local County Printer	When a user selects the Save button on the Print Person Notes Form screen AND The Print type = Print Now on CMIPS II Printer or Generate Now for Local Print	Case Management creates a new record on the Provider Forms screen that displays the following data: <ul style="list-style-type: none">• Action - Displays View, Edit, and Print links• Name - Displays Person Notes• Language - Displays English• Status - Displays Printed• Date Time - Display the date and time the record is created in the system System launches the PDF form document when the user clicks the Print link. The form document is printed to the form requestor's local county printer when the request is from Print type = Print Now on CMIPS II Printer. Note: When a person is both a provider and a recipient - Recipient ID on the PDF file will take precedent. Provider ID is blank.
70	16212 12314	CI-824410 - DSD BR OS 70 IMPLEMENTED	Modify/Update Mailing/Residential Address Validations	When a CMIPS user enters a special character in an address field via copy/paste AND The user selects the Verify button on any impacted Address screens	Case Management will: <ul style="list-style-type: none">• Refine the data entered to remove special characters• Convert any special characters into keyboard recognized characters• Ensure UTF-8 encoding is used to process and store addresses Note: Special characters that are not allowed and will be removed are: <ul style="list-style-type: none">• Bullet Point (•)• Bullet Circle (○)• Bullet Square (□)• Bullet Diamond (◆)• Bullet Arrow (→)• Check Mark (✓)• Ellipsis (...)• em-dash (—)• Tab (Tab)• Exclamation (!)• Quotation Mark ("")• Ampersand (&)• Open/Left Parenthesis (())• Asterisk (*)• Plus (+)• Colon (:)• Semi Colon (;)• Greater Than (>)• Question Mark (?)• At (@)• Closed/Right Square Bracket ([])• Underscore (_)• Grave Accent (`)• Two (2) or more continuous spaces or special characters• Single quote/Apostrophe ('') Special characters that are allowed: <ul style="list-style-type: none">• Space• Slash (/)• Hyphen (-)• Pound sign (#)• Comma (,)• Period (.) The special characters will be limited based on the field they are being entered in to: <ul style="list-style-type: none">• Establishment Name, Number and Street Name can contain the following: Space, Slash, Hyphen, Pound sign, Comma and Period• Unit Number can contain the following: Space, Slash, Hyphen, Pound sign, and Period• City can contain the following: Space, Hyphen• Zip Code can contain the following: Hyphen

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (1-10)

No	Req ID	CI	Description	When	Action
1	12063	CI-111369 - DSD BR OS 01 IMPLEMENTED	CIN Selection	When CIN is selected from SCI during Case creation process	CMIPS will save MEDS information associated with the OM Transaction (Medi-Cal Eligibility transaction)
2	12650 12653	CI-111370 - DSD BR OS 02 IMPLEMENTED	Person Search	When the Search button is selected: <ul style="list-style-type: none">• SSN is entered• CIN is or is not entered• Provider Number is or is not entered• Full or partial last name is or is not entered• Complete address is or is not entered• Other search criteria are or are not entered.	The search will be executed. Only the SSN is used as the search criteria and other entered search criteria will be ignored. The value that matches the SSN entered will display.
3	12650 12653	CI-111371 - DSD BR OS 03 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none">• SSN is not entered• CIN is entered• Provider Number is or is not entered• Full or partial last name is or is not entered• Complete address is or is not entered• Other search criteria are or are not entered.	The search will perform. Only CIN is used as the search criteria and other entered search criteria will be ignored.
4	12650 12653	CI-111372 - DSD BR OS 04 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none">• SSN is not entered• CIN is not entered• Provider Number is not entered• Full or partial last name is or is not entered• Complete address is or is not entered• Other search criteria are or are not entered.	The search will perform. All search criteria (address and other search criteria) will be used together to do the search.
5	12650 12653	CI-111373 - DSD BR OS 05 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none">• SSN is not entered• CIN is not entered• Provider Number is not entered• Full or partial last name is not entered and last name has at least two characters• Complete or incomplete address is entered• Other search criteria are or are not entered.	The search will perform. All search criteria (address and other search criteria) will be used together to do the search.
6	12025	CI-111374 - DSD BR OS 06 IMPLEMENTED	Create Alternative ID	When the Save link is selected on the Create Alternative ID screen <ul style="list-style-type: none">• and the Type is Social Security Number• and the Alternative ID field is not blank• and the associated Person Record has "Blank SSN Reason" of Applied for SSN	Allow the save action and reset the Person Home "Blank SSN Reason" field to "blank."
7	12273	CI-111375 - DSD BR OS 07 IMPLEMENTED	Create Phone Number	When the Save link is selected on the "Create Phone Number" screen and "Primary" is indicated and another "Phone Number" indicates "Primary"	<ul style="list-style-type: none">• Indicate the current record as "Primary"• Deselect "Primary" on the previous "Phone Number" record
8	12273	CI-111376 - DSD BR OS 08 IMPLEMENTED	Modify Phone Number	When the Save link is selected on the "Modify Phone Number" screen and "Primary" is indicated and an existing "Phone Number" screen indicates "Primary"	<ul style="list-style-type: none">• Indicate the current record as "Primary"• Deselect "Primary" on the previous "Phone Number" record

9	11989	 CI-111377 - DSD BR OS 09 IMPLEMENTED	SAWS Send	<p>When the Save link is selected on the "Create Case" screen for a Recipient with either no Medi-Cal or without active Medi-Cal.</p> <ul style="list-style-type: none"> • No Medi-Cal is determined as follows: If the SCI OI response return code = 100 (No match found). • Without active Medi-Cal is determined as follows: The Medi-Cal eligibility status in the SCI OM response contains a 9 in both the first and third digits. 	Send SAWS S1 (CMSD4XXB) "IHSS Referral for Medi-Cal determination"
10	12263	 CI-111378 - DSD BR OS 10 IMPLEMENTED	SAWS Receive	<p>When S2 transaction is received from SAWS in response to S1 transaction AND The CIN received does not match the CIN on the Person record AND The CIN received does not match a CIN on another Person record in CMIPS</p>	<ul style="list-style-type: none"> • Update the CIN on the Person record • Perform CIN re-clearance and Medi-Cal Eligibility selection • Send MEDS IH18 (CMDS103C) – Pending Application

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (11-20)

No	Req ID	CI	Description	When	Action
11	16052	CI-111379 - DSD BR OS 11 IMPLEMENTED	Update to applicant's demographic data	<p>When there is an update to the IHSS applicant's demographic data</p> <ul style="list-style-type: none"> • When the Save link is selected on the "Modify Person" screen. • When the "Change" link is selected on the "Case Home" screen. • When the Save link is selected on the "Modify Phone Number" screen. • When the link in "Action" column is selected on the "Maintain Street Address" screen. • When the link in "Action" column is selected on the "Maintain PO Box Address" screen. • When the link in "Action" column is selected on the "Maintain Rural Route Address" screen. • When the link in "Action" column is selected on the "Maintain General Delivery Address" screen. • When the link in "Action" column is selected on the "Maintain Highway Address" screen. • When the link in "Action" column is selected on the "Maintain Other Address" screen. 	Send MEDS IH12 (CMDS103C) – Update Client Information
12	16052	CI-111380 - DSD BR OS 12 IMPLEMENTED	IHSS application is denied	When a case status changes from Pending to Denied	Send MEDS IH34 (CMDS103C) – Update Application Data
13	16052	CI-111381 - DSD BR OS 13 IMPLEMENTED	IHSS application created	<p>When the Save link is selected on the "Create Case" screen and the CIN selected has active Medi-Cal:</p> <ul style="list-style-type: none"> • Active Medi-Cal - Any Medi-Cal eligibility status in the SCI OM response contains other than a 9 in both the first and third digits. 	Send MEDS IH18 (CMDS103C) – Pending Application
14	12047	CI-111382 - DSD BR OS 14 IMPLEMENTED	Modify Person	<p>When the Save link is selected on the Modify Person screen and any of the following fields have been modified:</p> <ul style="list-style-type: none"> • Last Name • First Name • Middle Initial • Date of Birth • Gender 	Send OU transaction to SCI
15		CI-111383 - DSD BR OS 15 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
16	11989	CI-111384 - DSD BR OS 16 IMPLEMENTED	SAWS Send	<p>When the Save link is selected on the "Create Case" screen for a Recipient with active Medi-Cal:</p> <ul style="list-style-type: none"> • Active Medi-Cal is determined when the Medi-Cal eligibility status in the SCI OM response contains other than a nine (9) in both the first and third digits and the Medi-Cal Aid Codes is other than 10, 20 or 60. 	Send S8 (SMDS4XXB) Notification of IHSS "Pending" status
17	11952	CI-111385 - DSD BR OS 17 IMPLEMENTED	Create Referral	When the Save link is selected on the Create Referral screen and the current record has a Person Type of Provider	Add and display second Person Type of Open Referral
18	11953	CI-111386 - DSD BR OS 18 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and the current record has a Person Type of Provider	Add and display the second Person Type of Applicant
19	11953	CI-111387 - DSD BR OS 19 IMPLEMENTED	Create Case	When the Save link is selected on the Create Case screen and the current record has a Person Type of Open Referral	Update the Open Referral Person Type to Applicant
20	12650 12653	CI-116760 - DSD BR OS 20 IMPLEMENTED	Person Search	If the following are true: <ul style="list-style-type: none"> • SSN is not entered • CIN is not entered • Provider Number is entered • Full or partial last name is or is not entered and last name has at least two (2) characters • Complete or incomplete address is not entered • Other search criteria are or are not entered. 	The search will perform. Only the Provider Number is used as the search criteria and other entered search criteria will be ignored.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (21-30)

No	Req ID	CI	Description	When	Action
21	16719	CI-117715 - DSD BR OS 21 IMPLEMENTED	Create Alternative ID – Type SSN	When the Save link is selected on the Create Alternative ID screen and the Type is Social Security Number <ul style="list-style-type: none"> • and the Duplicate field is indicated as Duplicate SSN 	Set the Person record Duplicate field to "Duplicate SSN".
22	16720	CI-117716 - DSD BR OS 22 IMPLEMENTED	Create Alternative ID – Type SSN	When the Save link is selected on the Create Alternative ID screen <ul style="list-style-type: none"> • and the Type is Social Security Number • and the Duplicate field is indicated as Suspect SSN 	Set the Person record Duplicate field to Suspect SSN. The indicated SSN shall be "released" Released SSN – This action will allow the Alternative ID – Type SSN indication to be used as the SSN on another Person record. If the associated Person record is a Type Provider all Provider/Recipient relationships must be terminated. If the associated Person record is a Type Applicant or Recipient the associated case must be "Withdrawn, Denied or Terminated." This record will display when CMIPS is search by SSN, but no further action will be allowed against this person record. Payroll activity will occur until the record was inactivated (Terminated). for use in the CMIPS application.
23		CI-117717 - DSD BR OS 23 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
24		CI-117718 - DSD BR OS 24 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
25		CI-117719 - DSD BR OS 25 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
26		CI-117720 - DSD BR OS 26 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
27		CI-117721 - DSD BR OS 27 CANCELLED	Cancelled by ASR Sprint 43 Team 1&2		
28	16829	CI-116761 - DSD BR OS 28 IMPLEMENTED	Create Referral - Display Name in All Uppercase Letters	When the Save link is selected on the Create Referral screen and lowercase letters were used when entering the following fields: <ul style="list-style-type: none"> • Last Name • First Name • Middle Name 	Display the First Name, Last Name and Middle Name entries in all uppercase letters on the Person Home screen.

29	16829	 CI-116762 - DSD BR OS 29 IMPLEMENTED	Create Application - Display Name in All Uppercase Letters	When the Save link is selected on the Create Applicant screen and lowercase letters were used when entering the following fields: <ul style="list-style-type: none">• Last Name• First Name• Middle Name	Display the First Name, Last Name and Middle Name entries in all uppercase letters on the Person Home screen.
30	16829	 CI-116763 - DSD BR OS 30 IMPLEMENTED	Modify Person - Display Name in All Uppercase Letters	When the Save link is selected on the Modify Person screen and any of the following fields were modified using lowercase letters: <ul style="list-style-type: none">• Last Name• First Name• Middle Name	Display the First Name, Last Name and Middle Name entries in all uppercase letters on the Person Home screen.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (31-40)

No	Req ID	CI	Description	When	Action
31	16937	CI-444453 - DSD BR OS 31 IMPLEMENTED	Create Alternate ID	When the Create Alternate ID screen displays	Set the "From" field to the current date
32	16937	CI-444454 - DSD BR OS 32 IMPLEMENTED	SCI CIN Search – CIN on Case (Create Case, Reactivate Case or Create Alternative ID Type)	When a CIN Clearance is processed and an Alternate ID Type Client Index Number is indicated	If Medi-Cal Pseudo field is not checked send Client Index Number, First Name, Last Name, Date of Birth, Gender and Social Security Number if present as Statewide Client Index search criteria If Medi-Cal Pseudo field is checked send Client Index Number, First Name, Last Name, Date of Birth, and Gender if present as Statewide Client Index search criteria Notes: If Client Index Number is more than nine (9) characters send only the first nine (9) characters only Client Index Number may be alpha numeric value.
33	16937	CI-444455 - DSD BR OS 33 IMPLEMENTED	SCI CIN Search – No CIN or SSN on Case (Create Case, Reactivate Case or Create Alternative ID Type)	When a CIN Clearance is processed and neither an Alternate ID Type Client Index Number nor is an Alternate ID Type Social Security Number indicated	Send Person First Name, Last Name, Date of Birth, and Gender as Statewide Client Index search criteria
34		Merge Duplicate SSN		When the Verify link is selected on the Merge Duplicate SSN screen and no errors are encountered	Change the Verify link to "Save".
35		Merge Duplicate SSN		When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and <ul style="list-style-type: none"> • The Master Record has an Alternative ID Type of Conversion Duplicate • And the Person Type is Applicant or Recipient and the current case status is Pending, Eligible, Presumptive Eligible or Leave • And any of the records indicated as a "Duplicate" has an Alternative ID Type of Social Security Number and the Duplicates field is blank • And the Person Type is Applicant or Recipient and the current Case Status is <ul style="list-style-type: none"> ◦ Application Withdrawn ◦ Or Terminated ◦ Or Denied 	Change the Verify link to "Save" <ul style="list-style-type: none"> • Allow the user to select the "Make Master" check box • Display the informational message, "[Case Number*] is currently a Master record. If you are sure you want the currently indicated case [Master Record Case] to be indicated as the Master Record, select the "Make Master" checkbox. <p>*The "Case Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)</p>
36		Merge Duplicate SSN		When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and <ul style="list-style-type: none"> • The Master Record has an Alternative ID Type of Conversion Duplicate • And the Person Type is Provider and the current Provider Status is Active • And any one of the records indicated as a Duplicate has an Alternative ID Type of Social Security Number and the Duplicates field is blank • And the Person Type is Provider and the current View Provider Details Provider Status is "Terminated" 	Change the Verify link to "Save" <ul style="list-style-type: none"> • Allow the user to select the "Make Master" check box • Display the informational message, "[Provider Number**] is currently a Master record. If you are sure you want the currently indicated Provider record [Master Record Provider Number] to be indicated as the Master Record, select the "Make Master" checkbox. <p>**The "Provider Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)</p>

37			Merge Duplicate SSN	When the Save link is selected on the Merge Duplicate SSN screen	<p>Update Alternative ID Type Social Security Number:</p> <ul style="list-style-type: none"> If the current Alternative ID Type of Social Security Number does not exist for the Master Record, add an Alternative ID Type of Social Security Number with the following entry <p>Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen Type Social Security Number Set Duplicates field to blank If Blank SSN Reason is indicated, clear the field For all records indicated as Duplicate SSN create an Alternative ID and populate as follows:</p> <ul style="list-style-type: none"> Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen Type Social Security Number Set Duplicates field to Duplicate SSN If Blank SSN Reason is indicated, clear the field In the Alternative ID Type Comment field enter "[User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable record." If record being merged is a CMIPS case, <p>Clear the current County Use field Populate the County Use field on the Case home with the comment "[Current Date] [User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable case."</p>
38	16943	CI-446650 - DSD BR OS 38 IMPLEMENTED	Merge Duplicate SSN	When the Verify link is selected on the Merge Duplicate SSN screen and no errors are encountered	Change the Verify link to "Save".
39	16943	CI-446651 - DSD BR OS 39 IMPLEMENTED	Merge Duplicate SSN	<p>When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and</p> <ul style="list-style-type: none"> The Master Record has an Alternative ID Type of Conversion Duplicate And the Person Type is Applicant or Recipient and the current case status is Pending, Eligible, Presumptive Eligible or Leave And any of the records indicated as a "Duplicate" has an Alternative ID Type of Social Security Number and the Duplicates field is blank And the Person Type is Applicant or Recipient and the current Case Status is <ul style="list-style-type: none"> Application Withdrawn Or Terminated Or Denied 	<p>Change the Verify link to "Save"</p> <ul style="list-style-type: none"> Allow the user to select the "Make Master" check box Display the informational message, "[Case Number]" is currently a Master record. If you are sure you want the currently indicated case [Master Record Case] to be indicated as the Master Record, select the "Make Master" checkbox. *(The "Case Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)
40	16943	CI-446652 - DSD BR OS 40 IMPLEMENTED	Merge Duplicate SSN	<p>When the "Verify" link is selected on the Merge Duplicate SSN screen and all errors have been resolved and</p> <ul style="list-style-type: none"> The Master Record has an Alternative ID Type of Conversion Duplicate And the Person Type is Provider and the current Provider Status is Active And anyone of the records indicated as a Duplicate has an Alternative ID Type of Social Security Number and the Duplicates field is blank And the Person Type is Provider and the current View Provider Details Provider Status is "Terminated" 	<p>Change the Verify link to "Save"</p> <ul style="list-style-type: none"> Allow the user to select the "Make Master" check box Display the informational message, "[Provider Number**]" is currently a Master record. If you are sure you want the currently indicated Provider record [Master Record Provider Number] to be indicated as the Master Record, select the "Make Master" checkbox. **The "Provider Number" which should display in the above message will be the record indicated as a Duplicate which has an Alternative ID Type of Social Security Number and the Duplicates field is blank.)

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (41-50)

No	Req ID	CI	Description	When	Action
41	16943	CI-446653 - DSD BR OS 41 IMPLEMENTED	Merge Duplicate SSN	When the Save link is selected on the Merge Duplicate SSN screen	<p>Update Alternative ID Type Social Security Number:</p> <ul style="list-style-type: none"> If the current Alternative ID Type of Social Security Number does not exist for the Master Record, add an Alternative ID Type of Social Security Number with the following entry Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen Type Social Security Number Set Duplicates field to blank If Blank SSN Reason is indicated, clear the field <p>For all records indicated as Duplicate SSN create an Alternative ID and populate as follows:</p> <ul style="list-style-type: none"> Alternative ID = Social Security Number indicated on Merge Duplicate SSN screen Type Social Security Number Set Duplicates field to Duplicate SSN If Blank SSN Reason is indicated, clear the field In the Alternative ID Type Comment field enter "[User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable record." <ul style="list-style-type: none"> If record being merged is a CMIPS case, <ul style="list-style-type: none"> Clear the current County Use field Populate the County Use field on the Case home with the comment "[Current Date] [User County] County indicated this record as Duplicate SSN and is no longer usable. See [Master Record] for usable case."
42	16974	CI-463579 - DSD BR OS 42 IMPLEMENTED	Re-open Closed Referral	When the Save link is selected on the Re-open Referral screen and the current record has a Person Type of Closed Referral	<ul style="list-style-type: none"> Update Person Type to Open Referral Update the Person Home County to the County associated to the user taking the Re-open action Update Referral Date to the current date Update Referral Source to the indicated Referral Source
43			Business Rule Removed with CR 1183		
44	16110 20821	CI-507583 - DSD BR OS 44 IMPLEMENTED	Create Application	When the Create Case link is selected on the Create Application screen AND Any of the following have been updated: <ul style="list-style-type: none"> Residence Address Mailing Address Phone Number Email Address 	Allow the save action and create a new record in the appropriate Person Contact and set the From Date to the current date
45	16110 20821	CI-507584 - DSD BR OS 45 IMPLEMENTED	Create Case – Update Person Contact "From Date"	When the Save link is selected on the Create Case screen and the IHSS Referral Date has been modified AND Any of the following Person Contact records exist: <ul style="list-style-type: none"> Residence Address Mailing Address Phone Number Email Address 	Update the From Date on all existing Person Contacts to the IHSS Referral Date

46	20821	CI-507582 - DSD BR OS 46 IMPLEMENTED	Create Email Address	When the Save link is selected on the Create Email Address Screen	<p>Save the new email address record with:</p> <ul style="list-style-type: none"> • Begin Date as Current Date • Status as Active • End Date as blank <p>IF An active email address record currently exists AND The Begin Date on that record is not the current date</p> <ul style="list-style-type: none"> • Set the End Date of the current active email address to current date - 1 • Set the status of the current active email address to "Inactive" <p>ELSE IF An active email address record currently exists AND The Begin Date on that record is the current date</p> <ul style="list-style-type: none"> • Set the End Date of the current active email address to Current Date • Set the status of the current active email address to "Inactive" <p>AND IF The person is registered to the IHSS Website THEN ALSO Send AMQP modifyEmail to the CMIPS Message Broker</p> <p>AND IF Recipient with an E-Timesheet Option of "IHSS Website" OR Provider with an E-Timesheet Status of "Enrolled" or "Request Pending" THEN ALSO Generate Notification of Email Address Change (ETSE21) addressed to the old email address and to the new email address, and include the date of change</p>
47		CI-754675 - DSD BR OS 47 CANCELLED	Cancelled by ASR 1287 – Sprint 33		
48	20821	CI-819669 - DSD BR OS 48 IMPLEMENTED	Inactivate Email Address	When the Yes link is selected on the Inactivate Email Address screen	<ul style="list-style-type: none"> • Save the record with the current date as the End Date • Set the status of the email address record to Inactive
49	20799	CI-822328 - DSD BR OS 49 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to English</p> <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to English
50	20799	CI-822329 - DSD BR OS 50 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to Spanish</p> <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to Spanish

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (51-60)

No	Req ID	CI	Description	When	Action
51	20799	 CI-822400 - DSD BR OS 51 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to one of the following:</p> <ul style="list-style-type: none"> • Cantonese • Mandarin <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to Chinese.
52	20799	 CI-822401 - DSD BR OS 52 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to Armenian</p> <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to Armenian.
53	20799	 CI-822402 - DSD BR OS 53 IMPLEMENTED	Modify Person – Written Language	<p>The Recipient's Written Language is updated to a non-threshold language</p> <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	The Blind or Visually Impaired Notice of Action Option Language will be updated to or remain English.
54	20799	 CI-822403 - DSD BR OS 54 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to anything other than one of the following:</p> <ul style="list-style-type: none"> • English • Spanish • Cantonese • Mandarin • Armenian <p>AND</p> <p>The Blind or Visually Impaired Notice of Action Option is:</p> <ul style="list-style-type: none"> • Large Font • Data CD 	Update the Blind or Visually Impaired Notice of Action Option Language to English.
55	20799	 CI-822404 - DSD BR OS 55 IMPLEMENTED	Modify Person – Written Language	<p>When the Recipient's Written Language is updated to English</p> <p>AND</p> <p>The Blind or Visually Impaired IHSS Required Forms Option is one of the following:</p> <ul style="list-style-type: none"> • Large Font • Audio CD • Data CD 	Update the Blind or Visually Impaired IHSS Required Forms Option Language to English.

56	20799	 CI-822405 - DSD BR OS 56 IMPLEMENTED	Modify Person – Written Language	When the Recipient's Written Language is updated to Spanish AND The Blind or Visually Impaired IHSS Required Forms Option is one of the following: <ul style="list-style-type: none">• Large Font• Audio CD• Data CD	Update the Blind or Visually Impaired IHSS Required Forms Option Language to Spanish.
57	20799	 CI-822406 - DSD BR OS 57 IMPLEMENTED	Modify Person – Written Language	When the Recipient's Written Language is updated to one of the following: <ul style="list-style-type: none">• Cantonese• Mandarin AND The Blind or Visually Impaired IHSS Required Forms Option is one of the following: <ul style="list-style-type: none">• Large Font• Data CD	Update the Blind or Visually Impaired Notice of Action Option Language to Chinese.
58	20799	 CI-822407 - DSD BR OS 58 IMPLEMENTED	Modify Person – Written Language	The Recipient's Written Language is updated to Armenian AND The Blind or Visually Impaired IHSS Required Forms Option is one of the following: <ul style="list-style-type: none">• Large Font• Data CD	Update the Blind or Visually Impaired IHSS Required Forms Option Language to Armenian.
59	20799	 CI-822408 - DSD BR OS 59 IMPLEMENTED	Modify Person – Written Language	The Recipient's Written Language is updated to a non-threshold language AND The Blind or Visually Impaired IHSS Required Forms Option is one of the following: <ul style="list-style-type: none">• Large Font• Audio CD• Data CD	The Blind or Visually Impaired IHSS Required Forms Option will be updated to or remain English.
60	20799	 CI-822409 - DSD BR OS 60 IMPLEMENTED	Modify Person – Written Language	The Recipient's Written Language is updated to anything other than one of the following: <ul style="list-style-type: none">• English• Spanish• Cantonese• Mandarin• Armenian AND The Blind or Visually Impaired IHSS Required Forms Option is: <ul style="list-style-type: none">• Large Font• Data CD	Update the Blind or Visually Impaired IHSS Required Forms Option Language to English.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Rules (61-70)

No	Req ID	CI	Description	When	Action
61	21023	CI-822469 - DSD BR OS 61 IMPLEMENTED	Update IHSS ESP Written Language	The "Written Language" for a Recipient or Provider is successfully updated AND IF The person is registered to the IHSS Website	THEN Send AMQP modifyWrittenLanguage (IWOM885C) web service to the CMIPS Message Broker to update ESP written language
62		CI-822588 - DSD BR OS 62 CANCELLED	Cancelled by CR170		
63		CI-822589 - DSD BR OS 63 CANCELLED	Cancelled by CR170		
64		CI-822603 - DSD BR OS 64 CANCELLED	Cancelled by CR170		
65	21254	CI-822880 - DSD BR OS 65 IMPLEMENTED	Create Alternative ID – Add Taxpayer ID for Recipient	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Person Type is Applicant</p> <p>OR</p> <p>The Person Type is Recipient</p> <p>OR IF</p> <p>The Person Type includes Provider with Eligible = Yes</p> <p>AND</p> <p>The Case Status is Pending, Eligible, Presumptive Eligible or On-Leave</p> <p>AND</p> <p>The Alternative ID field is populated</p> <p>AND</p> <p>The Type = Taxpayer ID</p> <p>AND</p> <p>The Blank SSN Reason field is blank</p> <p>AND</p> <p>No errors are encountered</p>	<p>Save is successful</p> <p>AND</p> <p>If there is an existing Alternative ID record with Type = Taxpayer ID, then set 'To' date on the existing record to the day prior to current date.</p> <p>AND</p> <p>Create new Alternative ID record:</p> <ul style="list-style-type: none"> • Set 'Alternative ID' to the entered value • Set Type = Taxpayer ID • Set 'From' date as current system date ('To' date = 12/31 /9999 (high end date)) • Set Blank SSN Reason as blank • Capture the username for Changed By • Save the Comments <p>AND</p> <p>The Create Alternative ID pop-up is closed, and the user is returned to the Alternative IDs list screen.</p> <p>Note: Web service to Advantage is not invoked.</p>

66	16718	CI-822894 - DSD BR OS 66 IMPLEMENTED	Create Alternative ID – Remove SSN	<p>When the Save link is selected on the Create Alternative ID pop-up</p> <p>AND</p> <p>The Alternative ID field is blank</p> <p>AND</p> <p>The Type = Social Security Number</p> <p>AND</p> <p>The Blank SSN Reason = Applied For SSN</p> <p>AND</p> <p>No errors are encountered</p>	<p>CM:</p> <p>Save is successful</p> <p>For the existing Alternative ID record with Type = Social Security Number</p> <ul style="list-style-type: none"> • Set 'To' date to the day prior to current date <p>Create new Alternative ID record:</p> <ul style="list-style-type: none"> • Set 'Alternative ID' to blank (NULL) • Set Type = Social Security Number • Set 'From' date as current system date • Set Blank SSN Reason to 'Applied For SSN' • Capture the username for Changed By • Save the Comments <p>The Create Alternative ID pop-up is closed, and the user is returned to the Alternative IDs list screen.</p> <p>Webservice (PROO923A) to Advantage with blank SSN and Blank SSN Reason</p> <p>ADV:</p> <p>Process and apply SSN update to remove SSN and indicate Blank SSN Reason as Applied For SSN.</p>
67	16212 12273 12314 12315	CI-823015 - DSD BR OS 67 IMPLEMENTED	Addresses - Update Address	<p>When the Save link is selected on the Create Address pop-up</p> <p>AND</p> <p>No errors are encountered</p>	<p>Save is successful</p> <p>AND</p> <p>The new address "From" date is set to the current date</p> <p>AND</p> <p>The new address "To" date is set to blank</p> <p>AND</p> <p>The old address "To" date is set to the date prior to the current date</p> <p>AND</p> <p>If the address is a Recipient's Residential address, it is marked as pending in GeocodeAddressTrigger table.</p>
68	16218 16957	CI-823806 - DSD BR OS 68 IMPLEMENTED	Print Person Notes Form - Generate Person Notes File via Nightly Batch	<p>When a user selects the Save button on the Print Person Notes Form screen</p> <p>AND</p> <p>The Print type = Print in Nightly Batch</p> <p>AND</p> <p>The person type is Provider</p>	<p>Case Management creates a new record on the Provider Forms screen that displays the following data:</p> <ul style="list-style-type: none"> • Action - Displays View and Edit links • Name - Displays Person Notes • Language - Displays English • Status - Displays Pending • Date Time - Display the date and time the record is created in the system <p>Note: When a person is both a provider and a recipient - Recipient ID on the PDF file will take precedent. Provider ID is blank.</p>
69	16218 16957	CI-823822 - DSD BR OS 69 IMPLEMENTED	Print Person Notes Form - Generate Person Notes File on Local County Printer	<p>When a user selects the Save button on the Print Person Notes Form screen</p> <p>AND</p> <p>The Print type = Print Now on CMIPS II Printer or Generate Now for Local Print</p>	<p>Case Management creates a new record on the Provider Forms screen that displays the following data:</p> <ul style="list-style-type: none"> • Action - Displays View, Edit, and Print links • Name - Displays Person Notes • Language - Displays English • Status - Displays Printed • Date Time - Display the date and time the record is created in the system <p>System launches the PDF form document when the user clicks the Print link.</p> <p>The form document is printed to the form requestor's local county printer when the request is from Print type = Print Now on CMIPS II Printer.</p> <p>Note: When a person is both a provider and a recipient - Recipient ID on the PDF file will take precedent. Provider ID is blank.</p>

70	16212 12314	 CI-824410 - DSD BR OS 70 IMPLEMENTED	Modify/Update Mailing/Residential Address Validations	<p>When a CMIPS user enters a special character in an address field via copy/paste</p> <p>AND</p> <p>The user selects the Verify button on any impacted Address screens</p>	<p>Case Management will:</p> <ul style="list-style-type: none"> • Refine the data entered to remove special characters • Convert any special characters into keyboard recognized characters • Ensure UTF-8 encoding is used to process and store addresses <p>Note: Special characters that are not allowed and will be removed are:</p> <ul style="list-style-type: none"> • Bullet Point (•) • Bullet Circle (○) • Bullet Square (□) • Bullet Diamond (◇) • Bullet Arrow (→) • Check Mark (✓) • Ellipsis (...) • em-dash (–) • Tab (Tab) • Exclamation (!) • Quotation Mark ("") • Ampersand (&) • Open/Left Parenthesis (()) • Asterisk (*) • Plus (+) • Colon (:) • Semi Colon (;) • Greater Than (>) • Question Mark (?) • At (@) • Closed/Right Square Bracket ([]) • Underscore (_) • Grave Accent (`) • Two (2) or more continuous spaces or special characters • Single quote/Apostrophe ('') <p>Special characters that are allowed:</p> <ul style="list-style-type: none"> • Space • Slash (/) • Hyphen (-) • Pound sign (#) • Comma (,) • Period (.) <p>The special characters will be limited based on the field they are being entered in to:</p> <ul style="list-style-type: none"> • Establishment Name, Number and Street Name can contain the following: Space, Slash, Hyphen, Pound sign, Comma and Period • Unit Number can contain the following: Space, Slash, Hyphen, Pound sign, and Period • City can contain the following: Space, Hyphen • Zip Code can contain the following: Hyphen
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DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Tasks and Notifications

See DSD Section 31 for all CMIPS Tasks and Notifications.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Create Recipient in Payroll (PROO901A)

CI	Document Name
CI-69638 - DSD INTF Create Recipient in Payroll PROO901A IMPLEMENTED	DSD_INTF_Create_Recipient_in_Payroll_PROO901A.doc

The Case Management System sends Recipient data to the Payroll System to establish Recipients in the Payroll System. This interface identifies the data elements involved in this interface. Data Elements of Interface

Layout Name/Transaction: Create Recipient

This is the data layout for the Recipient Create interface transaction from Case Management system to the Payroll System to establish Recipient in Payroll System.

Data Elements

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
caseNumber	String	7	CaseHeader	caseReference	<p>Required.</p> <p>CM Case Number. This is a unique identifier for both systems.</p> <p>Create: This must be provided by CM.</p> <p>Update: This must be provided by CM.</p> <p>Sample: "1234567"</p>
applicationDate	String	8	IHSSCase	applicationdate	<p>CM Case Application Date.</p> <p>Create: This must be provided by CM.</p> <p>Update: This must be provided by CM.</p> <p>Format: CCYY-MM-DD.</p> <p>Sample: "2009-01-15"</p>
lastName	String	20	AlternateName	surname	<p>Rule Driven.</p> <p>Recipient's last name.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the value.</p> <p>Sample: "Smith"</p>
firstName	String	15	AlternateName	firstForename	<p>Rule Driven.</p> <p>Recipient's first name.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the value.</p> <p>Sample: "John"</p>
middleName	String	15	AlternateName	otherForename	<p>Optional.</p> <p>Recipient's middle name.</p> <p>Create: May be left blank (null) by CM.</p> <p>Update: Provided by CM if there is a change to the value.</p> <p>Sample: "James"</p>

nameSuffix	String	5	AlternateName	nameSuffix	<p>Optional.</p> <p>Recipient's name suffix.</p> <p>Create: May be left blank (null) by CM.</p> <p>Update: Provided by CM if there is a change to the value. Sample: "Jr"</p>
socialSecurityNumber	String	9	ConcernRoleAlternateID	alternateID where typeCode is "SSN"	<p>Rule Driven.</p> <p>Recipient's SSN.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the Recipient's SSN.</p> <p>Sample: "111223333"</p>
ssnType	String	1	Person	blankSsnReasonCd	<p>A = Applied for SSN</p> <p>R = Duplicate Research or Conversion Duplicate.</p>
blankSSNRSn	String	1			<p>A = Applied for SSN</p> <p>R = Duplicate Research or Conversion Duplicate. Duplicate Research will be identified as ^R with all zeroes for the SSN; ^R with an actual SSN (Alternative ID Type Conversion Duplicate) will identify the value as a Conversion Duplicate.</p>
dateOfBirth	String	20	Person	dateOfBirth	<p>Rule Driven.</p> <p>Recipient's Date of Birth.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the Recipient's date of birth.</p> <p>Sample: "1950-06-22"</p>
gender	String	1	PersonPerson	gender	<p>Gender of the Recipient.</p> <p>Sample: M for Male, F for Female.</p>
countyCode	String	2	IHSSCase	countyCode	<p>Rule Driven.</p> <p>Recipient's county where the case is being served.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the value.</p> <p>Sample: "01"</p>
districtOfficeCode	String	2	IHSSCase	Derived from prefPublicOfficeId	<p>Rule Driven.</p> <p>Recipient's district office where the case is being served.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the value.</p> <p>Sample: "01"</p>
workerNumber	String	4	Users	workerNumber	<p>Rule Driven.</p> <p>Social Worker Number.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the value.</p> <p>Sample: "8877"</p>
Mailing Address – Following fields belong to Address elements. Two (2) mailing addresses can exist in one transaction					
streetAddress1	String	75	Address	addressData	<p>Rule Driven.</p> <p>Recipient's Mailing street address line 1.</p> <p>As an employer, this does not need information regarding an Advance Pay Recipients fiduciary guardian – that is covered in the setup of the Recipient as a Provider to himself.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to mailing street name.</p> <p>Sample: "123 Main St"</p>

streetAddress2	String	75	Address	addressData	<p>Rule Driven.</p> <p>Recipient's Mailing street address line 2.</p> <p>As an employer, this does not need information regarding an Advance Pay Recipients fiduciary guardian – that is covered in the setup of the Recipient as a Provider to himself.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to mailing street name.</p> <p>Sample: "123 Main St"</p>
city	String	28	Address	addressData	<p>Rule Driven.</p> <p>Recipient's mailing city.</p> <p>Create: This must be provided by CM.</p> <p>Update: This must be provided by CM if there is a change to the mailing city name.</p> <p>Sample: = "Sacramento"</p>
state	String	2	Address	addressData	<p>Rule Driven.</p> <p>Recipients mailing state.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the mailing state.</p> <p>Sample: "CA"</p>
zip	String	10	Address	addressData	<p>Rule Driven.</p> <p>Recipient's mailing ZIP code.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the ZIP code.</p> <p>Sample: "95820-0000"</p>

Triggering Events

Screen Name	Trigger Point	Payroll Web service	Comments
Create Case	'Save' link	Create Recipient	After case is created.

Matching Criteria

CM Element Name	Payroll Element Name	Comments
Not applicable	Not applicable	Matching criteria is not applicable, as this is first time that the Recipient information is sent to Payroll.

Errors

Condition	Error Message
When there is an error in payroll	Display message to user "The Person Information could not be updated in Payroll. Please contact Help Desk."

Edits and Audits

All the Edits are applied as per the screen validations. When the transaction is sent to Payroll, the person data is logged in the CM log file.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Person Request (PROO922A)

CI	Document Name
CI-69640 - DSD INTF Update Person Request PROO922A IMPLEMENTED	DSD_INTF_Update_Person_Request_PROO922A.doc

The Case Management system sends person data to the Payroll System to update person information in the Payroll System.

Data Elements of Interface – UpdatePersonReq

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
caseNumber	String	7	CaseHeader	caseReference	Required. CM Case Number. This is a unique identifier for both systems. Create: This must be provided by CM. Update: This must be provided by CM. Sample: "1234567"
employeeID	String	10	CaseParticipantRole	employeeID	Required. Employee ID of the person.
nameSuffix	String	5	AlternateName	nameSuffix	Optional. Person's name suffix. Create: May be left blank (null) by CM. Update: Provided by CM if there is a change to the value. Sample: "Jr"
firstName	String	15	AlternateName	firstForename	Required. Person's first name. Create: This must be provided by CM. Update: Provided by CM if there is a change to the value. Sample: "John"
middleName	String	15	AlternateName	otherForename	Optional. Person's middle name. Create: May be left blank (null) by CM. Update: Provided by CM if there is a change to the value. Sample: "James"
lastName	String	20	AlternateName	surname	Required. Person's last name. Create: This must be provided by CM. Update: Provided by CM if there is a change to the value. Sample: "Smith"

effectiveDate	Date	10	Person	nameEffectiveDate	<p>Required.</p> <p>Effective date of Name Change.</p> <p>Update: Provided by CM if there is a change to the value.</p> <p>Format: CCYY-MM-DD.</p> <p>Sample: "2009-01-15"</p>
dateOfBirth	String	10	Person	dateOfBirth	<p>Rule Driven.</p> <p>Person's Date of Birth.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the Recipient's date of birth.</p> <p>Sample: "1950-06-22"</p>
gender	String	1	Person	gender	Person's gender.

Triggering Events

List of Triggering Events for the Interface: updatePersonReq

Screen Name	Trigger Point	Comments
Modify Person	'Save' link	Call this web service only if the Person Type is 'Applicant', 'Recipient' or 'Provider' and after applicant/Recipient/Provider is in the payroll system. Recipient in payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in 'CaseParticipantRole' table.

Matching Criteria

CM Element Name	Payroll Element Name	Comments
CaseParticipantRole.employeeID	EMPL.EMPLOYEE_ID	
CaseHeader.caseReference	TAXING_ENTITY.TAXING_ENTITY_CD	

Errors

Condition	Error Message
When Matching Criteria is not met	Display message to user 'The Person Information could not be updated in Payroll. Please contact helpdesk.'

Edits and Audits

All the Edits are applied as per the screen validations.

When the transaction is sent to Payroll and logging is enabled, the person data is logged in the Case management log file.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Person SSN (PROO923A)

CI	Document Name
CI-69642 - DSD INTF Update Person SSN PROO923A IMPLEMENTED	DSD_INTF_Update_Person_SSN_PROO923A.doc

The Case Management system sends person data to the Payroll System to update person information in the Payroll System.

Data Elements of Interface - updateSsnReq

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
caseNumber	String	7	CaseHeader	caseReference	Required. CM Case Number. This is a unique identifier for both systems. Create: This must be provided by CM. Update: This must be provided by CM. Sample: "1234567"
employeeID	String	10	CaseParticipantRole	employeeID	Required. Employee ID of the person.
ssn	String	9	ConcernRoleAlternateID	alternateID where typeCode is "SSN"	Rule Driven. Person's SSN. Create: This must be provided by CM. Update: Provided by CM if there is a change to the Recipient's SSN. Sample: "111223333"
startDate	Date	4	ConcernRoleAlternateID	startDate	From Date on the Modify Alternative ID
ssnType	String	1	ConcernRoleAlternateID	duplicatesCd	A = Applied for SSN

Triggering Events

List of Triggering Events for the Interface: updateSsnReq

Screen Name	Trigger Point	Comments
Modify Alternative ID	'Save' link	Call this Web service only if the Applicant/Recipient/Provider Alternate ID of type 'SSN' is edited from this screen and is in the Payroll system. Recipient will have multiple employee ids if the Recipient is also registered as a Provider. Recipient in Payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in 'CaseParticipantRole' table.

Matching Criteria

CM Element Name	Payroll Element Name	Comments
CaseParticipantRole.employeeID	EMPL.EMPLOYEE_ID	
CaseHeader.caseReference	TAXING_ENTITY.TAXING_ENTITY_CD	

Errors

Condition	Error Message
When Matching Criteria is not met	Display message to user 'The Person Information could not be updated in Payroll. Please contact helpdesk.'

Edits and Audits

All the Edits are applied as per the screen validations.

When the transaction is sent to Payroll and logging is enabled, the person data is logged in the Case Management log file.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Person Address (PROO924A)

CI	Document Name
CI-69639 - DSD INTF Update Person Address PROO924A IMPLEMENTED	DSD_INTF_Update_Person_Address_PROO924A.doc

The Case Management system sends person data to the Payroll System to update person information in the Payroll System.

Data Elements of Interface - updateAddressReq

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
caseNumber	String	7	CaseHeader	caseReference	<p>Required.</p> <p>CM Case Number. This is a unique identifier for both systems.</p> <p>Create: This must be provided by CM.</p> <p>Update: This must be provided by CM.</p> <p>Sample: "1234567."</p>
employeeID	String	10	CaseParticipantRole	employeeID	<p>Required.</p> <p>Employee ID of the person.</p>

Mailing Address – Following fields belong to Address elements.

StreetAddress1	String	75	Address	addressData	<p>Person's mailing street address 1.</p> <p>For address of type street address, Street address 1 consists of street number, pre, street name, suffix and post fields.</p> <p>For address of type PO box, Street address 1 consists of PO box number. The 'PO Box' will no longer be appended to this field.</p> <p>For address of type Rural Route, Street address 1 consists of Rural address.</p> <p>For address of type General delivery, Street address 1 consists of string 'General Delivery'.</p>
StreetAddress2	String	75	Address	addressData	<p>Person's mailing street address 2.</p> <p>For address of type street address, Street address 2 consists of unit type and unit number.</p> <p>For all other address types street address 2 is blank.</p>
cityName	String	28	Address	addressData	<p>Rule Driven.</p> <p>Person's mailing city name.</p> <p>Update: Provided by CM if there is a change to the mailing state.</p> <p>Sample: "Sacramento."</p>
stateCode	String	2	Address	addressData	<p>Rule Driven.</p> <p>Person's mailing state.</p> <p>Create: This must be provided by CM.</p> <p>Update: Provided by CM if there is a change to the mailing state.</p> <p>Sample: "CA."</p>

zip	String	10	Address	addressData	Rule Driven. Person's mailing Zip code. Create: This must be provided by CM. Update: Provided by CM if there is a change to the Zip code. Sample: "95820-1234."
beginDate	Date	10	ConcernRoleAddress	startDate	Required. Effective date of service (active from this date) for person's mailing address. Update: Provided by CM if there is a change to the value. Format: CCYY-MM-DD. Sample: "2009-01-15."
endDate	Date	10	ConcernRoleAddress	endDate	Default. This is always '12/31/9999' for new Person. Default value set by the interface process. Update: Provided by CM if there is a change to the value. Format: CCYY-MM-DD. Sample: "9999-12-31."
CASSMatch	String	1	ConcernRoleAddress	CASSMatch	If non-CASS validated address is selected, this value is "0" If CASS validated address is selected, this value is "1"
CASSUpdates	String	1	ConcernRoleAddress	CASSUpdates	If CASS or non-CASS validated address is selected, this value is "1"
CASSFailed	String	1	ConcernRoleAddress	CASSFailed	If non-CASS validated address is selected, this value is "1" If CASS validated address is selected, this value is "0"

Triggering Events

List of Triggering Events for the Interface: updateAddressReq

Screen Name	Trigger Point	Comments
Create Address	'Save' link	Call this Web service only if the Applicant/Recipient/Provider Mailing address is created after the case is approved. Recipient in Payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in CaseParticipantRole' table.
Maintain Street Address/ Maintain Other Address	Clicking 'User entered Address' or 'CASS Verified Address' in Action column	Call this Web service only if the Applicant/Recipient/Provider mailing address is modified. Recipient in Payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in CaseParticipantRole' table. Send combination of data from 'Number, Pre, Street, Suffix, Post' in order as 'Street1' on interface. Send combination of data from 'Unit Type & Unit Number' in order as 'Street2' on interface.
Maintain PO Box Address	Clicking 'User entered Address' or 'CASS Verified Address' in Action column	Call this Web service only if the Applicant/Recipient/Provider mailing address is modified. Recipient in Payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in CaseParticipantRole' table. Send 'PO Box' as 'Street1' on interface. 'Street2' is blank for this address type.
Maintain Rural Route Address	Clicking 'User entered Address' or 'CASS Verified Address' in Action column	Call this Web service only if the Applicant/Recipient/Provider mailing address is modified. Recipient in Payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in CaseParticipantRole' table. Send 'Rural Address' as 'Street1' on interface. 'Street2' is blank for this address type.

Maintain General Delivery Address	Clicking 'User entered Address' or 'CASS Verified Address' in Action column	Call this Web service only if the Applicant/Recipient/Provider mailing address is modified. Recipient in Payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in CaseParticipantRole table. Send 'Street Name' as 'Street1' on interface. 'Street2' is blank for this address type.
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Matching Criteria

CM Element Name	Payroll Element Name	Comments
CaseParticipantRole.employeeID	EMPL.EMPLOYEE_ID	
CaseHeader.caseReference	TAXING_ENTITY.TAXING_ENTITY_CD	

Errors

Condition	Error Message
When Matching Criteria is not met	Display message to user 'The Person Information could not be updated in Payroll. Please contact Help Desk.'

Edits and Audits

All the edits are applied as per the screen validations.

When the transaction is sent to Payroll and logging is enabled, person data is logged in the Case Management log file.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Internal Interfaces/Update Recipient Worker Number (PR00925A)

CI	Document Name
 CI-69641 - DSD INTF Update Recipient Worker Number PR00925A IMPLEMENTED	DSD_INTF_Update_Recipient_Worker_Number_PR00925A.doc

The Case Management system sends Recipient data to the Payroll System to update Worker Number for the case in the Payroll System.

Data Elements of Interface - updateWorkerNumberReq

Schema Element Name	Schema Element Type	Schema Element Length	CM Table	CM Table Column	Comments
caseNumber	String	7	CaseHeader	caseReference	Required. CM Case Number. This is a unique identifier for both systems. Create: This must be provided by CM. Update: This must be provided by CM. Sample: "1234567"
workerNumber	String	4	Users	WorkerNumber	Required. Worker Number associated with the case. Create: This must be provided by CM. Update: Provided by CM if Case Owner is changed.
districtoffice	String	2	IHSSCase	Derived from prefPublicOfficeId	Rule Driven. Recipient's district office where the case is being served. Create: This must be provided by CM. Update: Provided by CM if there is a change to the value. Sample: "01"

Triggering Events

List of Triggering Events for the Interface: updateWorkerNumberReq

Screen Name	Trigger Point	Comments
Case Home screen	'Change' link	Call this Web service only if the Recipient is in the Payroll system. Recipient in Payroll system can be verified by checking 'registeredPayrollDate' field in IHSSCase table and 'employeeID' field in CaseParticipantRole' table.

Matching Criteria

CM Element Name	Payroll Element Name	Comments
CaseParticipantRole. employeeID	EMPL.EMPLOYEE_ID	

CaseHeader.caseReference	TAXING_ENTITY.TAXING_ENTITY_CD	
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Errors

Condition	Error Message
When Matching Criteria is not met	Display message to user 'The Person Information could not be updated in Payroll. Please contact Help Desk.'

Edits and Audits

All the edits are applied as per the screen validations.

When the transaction is sent to Payroll and logging is enabled, person data is logged in the Case Management log file.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/External Interfaces

The following Interfaces will apply to Initial Contact – Intake Application. For the specific interfaces, see the Batch Processes section.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/External Interfaces/SCI Real Time – CMOO106A

CI	Document Name
CI-116395 - DSD EINTF SCI Real Time CMOO106A IMPLEMENTED	DSD_EINTF_SCI_Real_Time_CM00106A.doc

Internal Layout/System Mapping

Outbound SCI OI and SCI EL transaction

Source: Case Management		Target: Interface File			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-Length)	Description (Data Transformation Rules)	R/O (Required or Optional)
	N/A	SEARCH GROUP NUMBER	NUMERIC (2)	SCI can return a maximum of 25 records at one time. However, the user can use this field to ask for the next 25 records by indicating next search group number. Default value is '01' 01 = returns 1 – 25 02 = returns 26 – 50 03 = returns 51 – 75 ... 99 = returns 2,451 – 2,500	R
	CONCERNROLE /COUNTYCODE	COUNTY CODE	NUMERIC (2)	State identified county number	R
	N/A	TRANSACTION TYPE	STRING(2)	Possible Values: OI = Inquiry EL = Select with error OM = MEDS Eligibility OU = Update	R
	N/A	DELETE – REASON	FILLER(1)	Not populated for CMIPS	N/A
	N/A	DELETE – WORKER'S NAME	FILLER(10)	Not populated for CMIPS	N/A
	N/A	CLOSED INDICATOR	FILLER(1)	Not populated for CMIPS	N/A
	N/A	MINOR CONSENT INDICATOR	FILLER(1)	Not populated for CMIPS	N/A
	N/A	SEARCH LEVEL	STRING(1)	CMIPS Value = W Possible values are: W = Wide Address Search N = Narrow Address Search	R
	N/A	SUB-APPLICATION TYPE	FILLER(2)	Not populated for CMIPS	N/A
	N/A	APPLICATION TYPE	STRING(4)	Value = IHSS	R
	N/A	MOTHER'S FIRST NAME	FILLER(15)	N/A	N/A
	N/A	MOTHER'S LAST NAME	FILLER(18)	N/A	N/A
	N/A	SEARCH KEY INDICATOR	FILLER(1)	N/A	N/A

	N/A	HWDC ACCOUNT CODE	FILLER(10)	N/A	N/A
	N/A	CLIENT INDEX NUMBER	FILLER(9)	N/A	N/A
	N/A	CLIENT INDEX NUMBER CHECK-DIGIT	FILLER(1)	N/A	N/A
	CONCERNROLE /COUNTYCODE	COUNTY CODE	NUMERIC (2)	State identified county number	R
	N/A	ZIP CODE – 5	NUMERIC (5)	N/A	N/A
	N/A	ZIP CODE – 4	NUMERIC (4)	N/A	N/A
	N/A	ZIP CODE – 2	FILLER(2)	N/A	N/A
	N/A	ZIP CODE CHECK-DIGIT	FILLER(1)	N/A	N/A
	CONCERNROLE /PRIMARYALTER NATEID	SSN	STRING(9)	SSN/pseudo MEDSID without dashes. Invalid Numeric SSNs: '000000000' through '001010001', '111111111', '123456789', '222222222', '333333333', '444444444', '555555555', '666666666', '777777777', '800000000' through '999999999' Valid pseudo MEDSID/SSNs: '8____P' and '9____P'	R
	N/A	ALIEN NUMBER	FILLER(9)	N/A	N/A
	N/A	BIRTH COUNTY	FILLER(2)	N/A	N/A
	N/A	BIRTH STATE	FILLER(2)	N/A	N/A
	N/A	BIRTH COUNTRY	FILLER(2)	N/A	N/A
	N/A	RESIDENT STATE	STRING(2)	State Code	R
	PERSON /DATEOFBIRTH	DATE OF BIRTH – CENTURY AND YEAR	DATE (CCYY-4)		R
	PERSON /DATEOFBIRTH	DATE OF BIRTH – MONTH	DATE(MM- 2)	Values = 01 – 12	R
	PERSON /DATEOFBIRTH	DATE OF BIRTH – DAY	DATE(DD- 2)	Values = 01 – 31 (based on month and year)	R
	N/A	DATE OF BIRTH – TYPE	FILLER(1)	N/A	N/A
	PERSON /GENDER	GENDER	STRING(1)	Values: M = Male F = Female	R
	CONCERNROLE /CONCERNROLE NAME	NAME: LAST	STRING (20)	Special Characters Okay – Can include dashes or spaces	R
	CONCERNROLE /CONCERNROLE NAME	NAME: FIRST	STRING (15)	Special Characters Okay – Can include dashes or spaces Last name only if individual has a single name.	R
	N/A	NAME: MIDDLE	STRING (10)	N/A	N/A
	N/A	NAME: APPELLATION (SUFFIX)	STRING(3)	N/A	N/A
	N/A	FROZEN CIN	FILLER(9)	N/A	N/A
	N/A	FILLER	FILLER(11)	N/A	N/A
	N/A	NAME TYPE	FILLER(1)	N/A	N/A
	N/A	CORE DATA FLAG	FILLER(1)	N/A	N/A
	N/A	FILLER	FILLER(8)	N/A	N/A
	N/A	CONFIDENTIAL INDICATOR	FILLER(1)	N/A	N/A

	N/A	DEATH INDICATOR	FILLER(1)	N/A	N/A
	N/A	FROM – DATE OF BIRTH	FILLER(6)	N/A	N/A
	N/A	TO – DATE OF BIRTH	FILLER(6)	N/A	N/A
	N/A	FILLER	FILLER(22)	N/A	N/A
	N/A	STREET ADDRESS	STRING (46)	N/A	N/A
	N/A	CITY	STRING (20)	N/A	N/A

Inbound SCI OI/OU Return

Source: Interface File		Target: Case Management			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-Length)	Description (Data Transformation Rules)	R/O (Required or Optional)
	VERSION	N/A	NUMERIC (2)	Value = 01 (always)	R
	TOTAL MATCHES	N/A	NUMERIC (2)	Maximum of 25 for one group of return	R
	TRANSACTION TYPE	N/A	STRING(2)	Value = RT	R
	FILLER	N/A	FILLER(1)	SCI Future Use	R
	RETURN CODE	N/A	STRING(3)	<p>Values for transactions are: 600 = Invalid transaction type 900 = SCI database problem 999 = SCI system problem</p> <p>Values for OI transactions are: 000 = Match data returned –potential matches evaluated 100 = No matches found 811 = Input error return transaction – Last name or first name is missing</p> <p>Values for OU transactions are: 107 = Cannot update SSN on a minor consent case 300 = Confirmation of successful ADD or UPDATE – If transaction was an ADD, the Client Index system returns the new CIN and corresponding check digit 707 = Application type is missing or invalid H07 = Application type is missing or invalid 801 = Input error return transaction – Client Index Number is missing or invalid 806 = Input error return transaction – Alien Number is missing or invalid 810 = Input error return transaction – Sex Code is missing or invalid</p>	R
	SEQUENCE NUMBER	N/A	N/A	N/A	N/A
	TOTAL POTENTIAL MATCH RETURNS	N/A	NUMERIC (5)	Indicates total potential matches	R
	FILLER	N/A	N/A	N/A	N/A
	SUB-APPLICATION TYPE	N/A	N/A	N/A	N/A
	APPLICATION TYPE	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	TOTAL RETURN BYTES	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	SEARCH KEY	N/A	N/A	N/A	N/A
	TRANSACTION ID	N/A	N/A	N/A	N/A

	SEARCH TYPE	N/A	N/A	N/A	N/A
	SQL CODE	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	CLIENT INDEX NUMBER	CONCERNROLEAL TERNATEID /ALTERNATEID	STRING(9)		R
	CLIENT INDEX NUMBER CHECK-DIGIT	N/A	N/A	N/A	N/A
	SSN	N/A	STRING(9)		O
	ALIEN NUMBER	N/A	N/A	N/A	N/A
	SSN VERIFICATION CODE	N/A	N/A	N/A	N/A
	ALTERNATE SSN FLAG	N/A	N/A	N/A	N/A
	DATE OF BIRTH	N/A	DATE (CCYYMM DD-8)		O
	GENDER	N/A	STRING(1)	Values: M = Male F = Female U = Unknown	O
	NAME: LAST	N/A	STRING (20)	Special Characters Okay – Can include dashes or spaces	O
	NAME: FIRST	N/A	STRING (15)	Special Characters Okay – Can include dashes or spaces	O
	NAME: MIDDLE	N/A	N/A	N/A	N/A
	NAME: APPELLATION (SUFFIX)	N/A	N/A	N/A	N/A
	ALTERNATE NAME FLAG	N/A	N/A	N/A	N/A
	NAME TYPE	N/A	N/A	N/A	N/A
	COUNTY CODE	N/A	N/A	N/A	N/A
	ALTERNATE COUNTY FLAG	N/A	N/A	N/A	N/A
	ALTERNATE CIN FLAG	N/A	N/A	N/A	N/A
	FROZEN CIN	N/A	N/A	N/A	N/A
	FROZEN CIN APPLICATION TYPE	N/A	N/A	N/A	N/A
	FROZEN CIN COUNTY CODE	N/A	N/A	N/A	N/A
	CORE DATA FLAG	N/A	N/A	N/A	N/A
	HEALTHY FAMILIES FLAG	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	GHPP FLAG	N/A	N/A	N/A	N/A
	SFIS FLAG	N/A	N/A	N/A	N/A
	IHSS FLAG	N/A	N/A	N/A	N/A
	CHDP FLAG	N/A	N/A	N/A	N/A
	CALIFORNIA DRIVERS LICENSE/ID	N/A	N/A	N/A	N/A
	CONFIDENTIAL INDICATOR	N/A	N/A	N/A	N/A
	DEATH INDICATOR	N/A	N/A	N/A	N/A
	ALTERNATE DATA RETURN FLAG /ADDRESS TYPE	N/A	N/A	N/A	N/A

	MATCHING SCORE	N/A	N/A	N/A	N/A
	MEDS FLAG	N/A	N/A	N/A	N/A
	SAWS FLAG	N/A	N/A	N/A	N/A
	CATS FLAG	N/A	N/A	N/A	N/A
	CCS FLAG	N/A	N/A	N/A	N/A
	TIME STAMP	N/A	N/A	N/A	N/A

Inbound SCI OM and EL Return

Source: Interface File		Target: Case Management			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format- Length)	Description (Data Transformation Rules)	R/O (Required or Optional)
	VERSION	N/A	NUMERIC(2)	Value = 01 (always)	R
	TOTAL MATCHES	N/A	NUMERIC(2)	Maximum of 25 for one group of return	R
	TRANSACTION TYPE	N/A	STRING(2)	Value = RT	R
	FILLER	N/A	FILLER(1)	SCI Future Use	R
	RETURN CODE	N/A	STRING(3)	<p>Values are: 600 = Invalid Transaction Type 900 = SCI database problem 999 = SCI system problem</p> <p>Values for EL are: 300 = Confirmation of Successful ADD or UPDATE – If transaction was an ADD, the Client Index system returns the new CIN and corresponding check digit 305 = When user tries to link to an existing SCI record and transaction does not pass SCI evaluation. Link does not occur and data must be updated in CMIPS.</p> <p>Values for OM are: 000 = Match Data Returned – potential matches evaluated 100 = No matches found 601 = Comma/area length problem 610 = Client Index XREF record not found 612 = Program ID error with SCIMEDS 614 = Error with MEDS System ID 616 = Error with linking SCIMEDS 620 = Error with CINXREF read 630 = MEDS record not found 640 = Error with MEDS read</p>	R
	SEQUENCE NUMBER	N/A	N/A	N/A	N/A
	TOTAL POTENTIAL MATCH RETURNS	N/A	NUMERIC(5)	Indicates the total potential matches	R
	FILLER	N/A	N/A	N/A	N/A
	SUB- APPLICATION TYPE	N/A	N/A	N/A	N/A
	APPLICATION TYPE	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	TOTAL RETURN BYTES	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A

	SEARCH KEY	N/A	N/A	N/A	N/A
	TRANSACTION ID	N/A	N/A	N/A	N/A
	SEARCH TYPE	N/A	N/A	N/A	N/A
	SQL CODE	N/A	N/A	N/A	N/A
	FILLER	N/A	N/A	N/A	N/A
	MEDS – CIN	CONCERNROLEALTERNATEID /ALTERNATEID	STRING(9)		R
	MEDS – ID	CONCERNROLEALTERNATEID /ALTERNATEID	STRING(9)		O
	SSN VERIFICATION CODE	MEDICALELIGINFO /SSNVERIFICATIONCODE	STRING(1)	Values are: 0 = SSN-Ver previously submitted to MEDS 1 = SSN reported by client, not sight verified/no SSA referral 2 = SSN application filed at SSA district office, confirmation received by county 3 = SSN sight verified by county staff 5 = SSN not sight verified, SSA referral initiated 6 = No SSN, SSA referral initiated 7 = No valid input on county or MEDS 8 = SSN unattainable – undocumented person 9 = SSN not reported by client, no SSA referral A = SSN validated via SSA referral B = SSN via SSA referral – birth-date discrepancy identified C = SSN validated via SSA referral – sex discrepancy identified D = SSN validated by SSA referral – sex and birth-date discrepancy identified J = SSN validated via state validation K = SSN validated via state validation – birth-date discrepancy identified L = SSN validated via state validation – sex discrepancy identified M = SSN validated via state validation – sex and birth-date discrepancy identified P = Previously validated – SSN changed by SSI /SSP update or by MEB Q = Previously validated – birth-date changed outside of acceptable range R = Previously validated – SSN-Ver code changed by MB30 or EW03 T = Un-validated – SSN validated, not applied to MEDS due to subsequent birth-date change U = SSA referral matched MEDS, reported new SSN, MEDS-ID change notice sent to county V = Un-validated – SSA referral update failed, insufficient matching fields on MEDS W = Un-validated per SSA – name matched, birth-date did not match X = Un-validated per SSA – name matched, birth-date and sex did not match Y = Un-validated per SSA – name did not match, birth-date and sex not checked Z = Un-validated per SSA – SSN not known to SSA's Numident file	O
	MEDS BIRTHDAY	MEDICALELIGINFO /MEDSBIRTHDATE	DATE (CCYYMMDD-8)		O
	MEDS COUNTY CODE	MEDICALELIGINFO /MEDSCOUNTYCODE	NUMERIC(2)	State Identified County Number	O
	AID-CODE	MEDICALELIGINFO /PRIMARYCOUNTYID	STRING(2)	Reference MEDS Aid Code listing	O
	SERIAL	MEDICALELIGINFO/SERIAL AND MEDICALELIGINFO /PRIMARYCOUNTYID AND MEDICALELIGINFO /MEDICALCASENUMBER	STRING(10)	County Serial Number – 7 bytes County FBU – 1 byte County Person Number – 2 bytes	O
	BIC ISSUE DATE	MEDICALELIGINFO/ BICISSUEDATE	DATE (CCYYMMDD-8)		O

	SSI PAY STATUS	MEDICALELGINFO /SSIPAYSTATUSCODE	STRING(3)	<p>Values are: C01 = Current Pay E01 = Eligible but no payment due N01 = Non-pay Recipient's countable income exceeds Title XVI payment amount and his/her state's payment standard N02 = Non-pay Recipient is inmate of public institution N03 = Non-pay Recipient outside USA N04 = Non-pay Recipient's non-excludable resources exceed Title XVI limitations N07 = No longer disabled N10 = Failure to comply with approved drug or alcohol treatment plan N11 = Benefit sanction month because of failure to comply with approved treatment plan N13 = Not a citizen or is an ineligible alien N22 = Inmate of a penal institution N23 = Not a resident of the USA N24 = Claimant has been convicted of a felony or fraudulently misrepresenting residence N25 = Claimant is a fugitive felon or parole/probation violator S06 = Suspended – Recipient's address unknown S08 = Suspended – Representative payee development pending T01 = Terminated – Death of Recipient T30 = Terminated (manual termination) sort of an 'other' category T31 = Terminated (system generated termination) sort of an 'other' category T33 = Terminated (manual termination) no previous payment made</p>	O
	SSI DISTRICT OFFICE	MEDICALELGINFO /SSIDISTRICTOFFICE	STRING(3)		O
	SSI PAY STATUS DATE	MEDICALELGINFO /SSIPAYSTATUSDATE	DATE (CCYYMMDD-8)		O
	HEALTH INSURANCE COVERAGE	MEDICALELGINFO /HEALTHINSURANCECOVERAGEIND	STRING(12)	This field carries the Health Insurance Claim Number.	O
	MEDICARE STATUS	MEDICALELGINFO /MEDICARESTATUSCODE	NUMERIC(2)	<p>1st digit = Part A (Hospital) 2nd digit = Part B (Medical)</p> <p>Values are: 0 or blank = No coverage 1 = Paid for by beneficiary 2 = Paid for by State Buy-In 3 = Free (Part A only) 4 = Paid for by state other than California 5 = Paid for by Pension Fund 7 = Presumed eligible 9 = Aged alien ineligible for Medicare</p>	O
	OTHER HEALTH COVERAGE STATUS	MEDICALELGINFO /OTHERHEALTHCOVERSTATUSCODE	STRING(1)	<p>Values are: Pay and Chase OHC/Post Payment Recovery A = Any carrier (includes multiple coverage) Cost Avoidance OHC C = Campus Prime HMO D = Medicare Part D F = Medicare RISK HMO K = Kaiser L = Dental only policies P = PHP/HMO's & EPO (Exclusive Provider Option) not otherwise specified V = Any carrier (other than the above, includes multiple coverage) Other OHC Related Codes N = None O = Override</p>	O

	OTHER HEALTH COVERAGE SOURCE	MEDICALELGINFO /OTHERHEALTHCOVERSOURC ECODE	STRING(1)	Vales are: A = Update from SPE Accelerated Enrollment (AE) C = County Welfare Department (CWD) Blank = County Welfare Department (CWD) F = Healthy Families (HF) Administrative Vendor G = CMS-Net/GHPP System H = Update from other Health Coverage Recovery M = MEDS assigned from the OHC update logic O = CHDP Gateway Override P = Provider Initiated AE R = Batch update from the Other Health Coverage Master File S = Update from SSI/MEB T = Insurance information exchange with carrier U = Unknown (indicates problem in MEDS OHC logic) X = OHC '9' changed to 'A' based on Foster Care Eligibility	O
	RESTRICTION	MEDICALELGINFO /RESTRICTIONCODE	NUMERIC(3)	Values are: 1st and 2nd digits – State Assigned Restricted Service Status 01 = Drug Restriction 05 = Restricted scheduled drugs 11 = Restricted MD visits 12 = Restricted MD visits and drugs 14 = Restricted to Primary MD 15 = Restricted to Primary MD/drugs 20 = Prior authorization required for dental visits 21 = Prior authorization required for dental visits and drugs 23 = Prior authorization required for physicians visits, dental visits and drugs 24 = Recipient restricted to Primary Physician with prior authorization 60 = For claims payment, BIC Id number and issue date required 70 = CMSP OCCS Emergency Services Only 90 = Hospice services only 91 = Hospice services only 92 = Hospice services only 93 = Hospice Services plus other restriction 95 = Transfer of Assets - no LTC Scope 00 = Restriction Lifted 3rd digit – County-Identified Sensitive or Limited Service Cases 1 = County Confidential Case – Limited Service Cases 4 = Minor Consent Eligible – Services Related to Sexually Transmitted Diseases 5 = Minor Consent Eligible - Services Related to Mental Health Care 6 = Minor Consent Eligible - Services Related to Sexual Assault 7 = Minor Consent Eligible - Services Related to Drug or Alcohol Abuse 8 = Minor Consent Eligible - Services Related to Pregnancy or Family Planning 9 = Minor Consent Eligible - Services Related to Venereal Diseases	O
	ABAWD EFFECTIVE DATE	N/A	N/A	N/A	N/A
	ABAWD INDICATOR	N/A	N/A	N/A	N/A
	ABAWD STATUS	N/A	N/A	N/A	N/A
	INS ENTRY DATE	MEDICALELGINFO /INSENTRYDATE	DATE(CCYYMM-6)		O

	ALIEN STATUS	MEDICALELGINFO /ALIENSTATUSCODE	STRING(1)	Values are: A = Proven US citizen B = Alleged US citizen C = Conditional entrant admitted under INA section 203(a)(7) D = Deportation withheld admitted under INA section 243(h) or 241(b)(3) E = Amerasian refugee admitted under INA section 207 F = Refugee admitted under INA section 207 or 203 (a)(7) – SDX G = Parolee admitted under INA section 212(d)(5) – SDX H = Silva vs. Levi alien – SDX K = Lawful Permanent Resident (LPR) L = Asylee admitted under INA section 208 but not Kurdish or Iraqi asylee M = Residents of Northern Mariana Islands – SDX N = Identity and citizenship of the individual verified by the Numident interface (code was previously A or B) – SDX P = Pre-Jan 1, 1972 alien (presumed lawfully admitted for permanent residence) – SDX Q = Alleged born in US, corroborated by a US birthplace shown on online Numident – SDX R = Other refugee admitted under INA section 207 but not Amerasian or Indochinese refugee S = Other aliens (not a temporary visa holder) T = Alleged PRUCOL U = Undocumented alien V = Visitor/Student/VISA and other aliens with temporary documentation W = Parolee admitted under INA section 212(d)(5) with a period of parole over one year X = Indochinese refugee admitted under INA section 207 Y = Parolee admitted under INA section 212(d)(5) with a period of parole less than one year Z = Kurdish or Iraqi asylee admitted under INA section 208 5 = Citizen child born to refugee parent(s) 8 = Cuban/Haitian entrant	O
	DEATH DATE	MEDICALELGINFO /DEATHDATE	DATE (CCYYMMDD-8)		O
	DEATH SOURCE	MEDICALELGINFO /DEATHSOURCECODE	STRING(1)	Values are: B = Medicare Buy-in System C = CWD reported Death Date M = Medi-Cal Eligibility Branch O = Other State/County Health Program P = County Pickle status update R = Returned card S = SSA SSI/SSP update T = CWD reported Death Term Reason V = Vital Records System	O
	PICKLE STATUS	N/A	N/A	N/A	N/A
	PICKLE TYPE	N/A	N/A	N/A	N/A
	OHC PENDING	N/A	N/A	N/A	N/A
	OHC SOURCE PENDING	N/A	N/A	N/A	N/A
	PRIMARY ELIGIBILITY STATUS	MEDICALELGINFO /MEDICALPRIMARYELIGSTATU SCODE	NUMERIC(1)	CMIPS will use new field for Eligibility Status.	O
	FOOD STAMP ELIGIBILITY STATUS	N/A	N/A	N/A	N/A
	FOOD STAMP COUNTY ID	N/A	N/A	N/A	N/A
	1ST SPECIAL SEGMENT ELIGIBILITY STATUS	N/A	N/A	N/A	N/A
	1ST SPECIAL SEGMENT COUNTY ID	N/A	N/A	N/A	N/A

	2ND SPECIAL SEGMENT ELIGIBILITY STATUS	N/A	N/A	N/A	N/A
	2ND SPECIAL SEGMENT COUNTY ID	N/A	N/A	N/A	N/A
	3RD SPECIAL SEGMENT ELIGIBILITY STATUS	N/A	N/A	N/A	N/A
	3RD SPECIAL SEGMENT COUNTY ID	N/A	N/A	N/A	N/A
	PROCESS RETURN CODE	N/A	STRING(3)	<p>Values are:</p> <p>000 = Match Data Returned – potential matches evaluated</p> <p>100 = No matches found</p> <p>600 = Invalid Transaction Type 601 = Commarea length problem 610 = Client Index XREF record not found 612 = Program ID error with SCIMEDS 614 = Error with MEDS System ID 616 = Error with linking SCIMEDS 620 = Error with CINXREF read 630 = MEDS record not found 640 = Error with MEDS read</p> <p>900 = SCI database problem 999 = SCI system problem</p>	O
	PRIMARY ELIGIBILITY TERM DATE	MEDICALELGINFO /PRIMARYELIGTERMDATE	DATE (CCYYMMDD-8)		O
	PRIMARY ELIGIBILITY TERM REASON	MEDICALELGINFO /PRIMARYELIGTERMREASONCODE	STRING(2)	MEDS Medi-Cal Term Codes	O
	1ST SPECIAL SEGMENT ELIG TERM DATE	N/A	N/A	N/A	N/A
	1ST SPECIAL SEGMENT ELIG TERM REASON	N/A	N/A	N/A	N/A
	2ND SPECIAL SEGMENT ELIG TERM DATE	N/A	N/A	N/A	N/A
	2ND SPECIAL SEGMENT ELIG TERM REASON	N/A	N/A	N/A	N/A
	3RD SPECIAL SEGMENT ELIG TERM DATE	N/A	N/A	N/A	N/A
	3RD SPECIAL SEGMENT ELIG TERM REASON	N/A	N/A	N/A	N/A
	FOOD STAMP ELIGIBILITY TERM DATE	N/A	N/A	N/A	N/A
	BIRTHDATE VALIDATION	MEDICALELGINFO /BIRTHDATEVALIDATIONCODE	STRING(1)	<p>Values are:</p> <p>C = Client Reported G = Guess S = Verified per Reporting System</p>	O
	MEDS LAST NAME	MEDICALELGINFO/MEDSNAME	STRING(20)		O

	MEDS FIRST NAME	MEDICALELGINFO/MEDSNAME	STRING(15)	Blank if individual has single name	O
	MEDS MIDDLE INITIAL	N/A	N/A	N/A	N/A
	MEDS APPELLATION	MEDICALELGINFO /MEDSAPPELLATION	STRING(3)		O
	SSA BIRTHDATE	MEDICALELGINFO /SSABIRTHDATE	DATE (CCYYMMDD-8)		O
	MEDICARE PART D INDICATOR	N/A	N/A	N/A	N/A
	APPLICATION TYPE	MEDICALELGINFO /APPLICATIONTYPECODE	STRING(1)	<p>Values are:</p> <p>C = Consortia Conversion Transaction – not a new app D = CWD Annual Reevaluation, HF app referral E = CWD Other than annual reevaluation, HF app referral F = Fair Hearing Exception Referral (Retro Bridging) G = Pending app, general relief benefits, includes Medi-Cal N = Pending app, No Medi-Cal, No general relief O = Pending app, general relief benefits, No Medi-Cal P = Pending app, Includes Medi-Cal, No general relief B = Pending app, Includes Medi-Cal and Healthy Families (HF), from HF/SPE H = Pending app, Includes HF, from HF/SPE R = HF Annual Reevaluation, Medi-Cal app referral S = Pending app, includes Medi-Cal, for HF/SPE Z = Pending app, No Medi-Cal, No HF, from HF /SPE I = IEVS Inquiry only – not a new application M = Pending app, includes Medi-Cal, from MEB W = Pending CHDP Gateway application</p>	O
	DENIAL DATE	MEDICALELGINFO /MEDICALDENIALDATE	DATE (CCYYMMDD-8)		O
	DENIAL REASON	MEDICALELGINFO /MEDICALDENIALREASONCODE	STRING(1)	<p>Values are:</p> <p>A = Client Deceased B = Application Withdrawn C = Moved Out of State D = Loss of Contact/Unable to Locate Applicant E = Failure to Cooperate F = Does Not Meet CA Residency Requirements G = Excess Resources H = No Program Linkage I = Potential State Only Program Eligible did not apply for ongoing Medi-Cal (MEB only) J = No Deprivation K = Living in a Public Non-Medical Institution L = Existing AFDC/Medi-Cal/CMS Recipient M = Existing SSI/SSP Recipient N = Receiving Medicaid in Another State P = Duplicate Pending Application Q = IE/RR terminates accelerated enrollment (MEDS generated) R = Other S = Applicant can't apply for the person on the application Y = Erroneously reported application Z = No Valid Data Reported (MEDS generated)</p> <p>1 = Premium Not Paid (HF only) 2 = Income Does Not Meet Requirements (HF only) 3 = Home Address State Missing or Invalid (HF only) 4 = End Date for Employer Sponsored Insurance Missing or Invalid (HF only) 5 = Child is Eligible for Medicare Part A and B (HF only) 6 = Funding Not Available (HF only) 7 = Child age 19 or over not eligible for HFP</p>	O
	APPLICATION DATE	MEDICALELGINFO /APPLICATIONDATE	DATE (CCYYMMDD-8)		O
	MEDI-CAL SOC	MEDICALELGINFO /MEDICALSOC	NUMERIC(5)		O

	RV DUE MONTH	MEDICALELGINFO /RVDUEMONTH	STRING(2)	Values are: 01 – 12	O
	LAST RV COMPLETED DATE	MEDICALELGINFO /LASTRVCOMPLETEDDATE	DATE(CCYYMM-6)		O
	CITIZENSHIP DOC TYPE	MEDICALELGINFO /CITIZENSHIPDOCTYPENAME	STRING(2)	Refer to the MEDSCitizensDocType Code Table	O
	FILLER	N/A	N/A	N/A	N/A

	IDENTITY DOC TYPE	MEDICALELGINFO /IDENTITYDOCTYPECODE	STRING(2)	<p>Values are:</p> <p>1A = United States Passport issued without limitation 1B = Certificate of Naturalization (Form N-550 or N-570) 1C = Certificate of Citizenship (Form N-560 or N-561)</p> <p>2A = United States passport issued with limitations 2B = Driver's license issued by U.S. State or Territory with a photograph or other identifying information such as name, age, sex, race, height, weight and eye color 2C = School identification card with a photograph 2D = U.S. military card or draft record 2E = Identification card issued by Federal, State, or local government with the same information as a driver's license (a photograph or other identifying information such as name, age, sex, race, height, weight and eye color) 2F = U.S. Military dependent's identification card 2G = Certificate of Degree of Indian Blood or other U.S. American Indian/Alaskan Native Tribal document with a photograph or other personal identifying information 2H = U.S. Coast Guard Merchant Mariner card</p> <p>7A = School records including nursery or daycare records for a child under age 16 7W = Written Affidavit signed under penalty of perjury by a parent or guardian stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship) 7Z = Medi-Cal Application signed by a parent or guardian stating the date and place of birth for a child under age 16 (acceptable only when an affidavit was not used for citizenship)</p> <p>8B = Exempt from Verification – Confirmed Current SSI Eligible 8F = Exempt from Verification – Confirmed Medicare Entitlement 8G = Exempt from Verification – Confirmed receiving Title II Disability Benefits 8J = Exempt from Verification – Eligible under Foster Care or Adoption Assistance Program 8K = Exempt from Verification – Eligible under CalWORKs Cash Assistance Program 8P = Exempt from Verification – Eligible under Minor Consent Program 8Q = Exempt from Verification – Eligible under Deemed Infant Provision 8R = Exempt from Verification – Abandoned Baby Program eligible born in the U.S. 8S = Exempt from Verification – Confirmed Former SSI Eligible (No Longer SSI Eligible)</p> <p>9A = Unable to obtain identity documentation – Abandoned baby or child 9B = Unable to obtain identity documentation – Amnesia 9C = Unable to obtain identity documentation – Comatose client 9D = Unable to obtain identity documentation – Client otherwise incapacitated 9J = Unable to obtain identity documentation – County ended reasonable opportunity period due to client not making a good faith effort 9P = Unable to obtain identity documentation – Client says they cannot afford the cost to obtain an original document or written affidavit 9Q = Unable to obtain identity documentation – Client says they cannot locate an acceptable document and cannot get a written affidavit 9R = Unable to obtain identity documentation – Client requested end of reasonable opportunity period and did not provide any explanation or acceptable documentation</p>	O
	SSI LIVING ARRANGEMENT	MEDICALELGINFO /SSILIVINGARRANGE CODE	STRING(1)	<p>Values are:</p> <p>A = Own Household B = Another's Household C = Parent's Household (child cases only) D = Title XIX institution Blank = Individual is in a non-Title XIX institution or is outside the United States. Payment status is H10, N02, or N03.</p>	O

	OPTIONAL LIVING ARRANGEMENT	MEDICALELGINFO /OPTIONALLIVINGARRANGECODE	STRING(1)	Values are: A = Independent living with cooking facilities B = Out of Home Care C = Living in household of another E = Eligible Disabled Child to age 18 living in home of parent, guardian, or relative by marriage Z = Recipient not eligible or waives optional supplementation	O
	DISABILITY ONSET DATE	MEDICALELGINFO /DISABILITYONSETDATE	DATE(CCYYMM-6)		O
	FILLER	N/A	N/A	N/A	N/A
	MEDI-CAL ELIGIBILITY STATUS	MEDICALELGINFO /MEDICALELIGIBILITYSTATUS	NUMERIC(3)	Values are: 1st Digit = Medi-Cal/CMSP/Other Eligible Status 0 = Full Scope Medi-Cal Eligible (includes zero SOC) with no conditions 1 = Full Scope Medi-Cal LTC/SOC Eligible 2 = LTC/SOC Eligible with one or more conditions 3 = Eligible with one or more conditions – Certified SOC, Restricted Services, Minor Consent, CMSP Coverage, Limited Scope Medi-Cal Coverage and/or Partial Health Care Plan (HCP) Coverage 4 = Medi-Cal Eligible with Full Service Medi-Cal HCP Coverage 5 = Medi-Cal or CMSP Client with an Unmet Share of Cost Obligation 6 = Eligible for a Health or Welfare Program other than Medi-Cal or CMSP services 7 = Hold 8 = QMB Eligible pending Medicare part A & B confirmation 9 = Ineligible 2nd Digit = Normal/Exception Eligibility 0 = Normal Eligible 1 = Unconfirmed Immediate Need eligible reported more than one month prior 2 = Unconfirmed Immediate Need eligible reported 1 month prior 3 = Unconfirmed Immediate Need eligible reported in current month 4 = Forced eligible due to late termination 5 = Partial Month Eligibility (Healthy Families, etc.) 7 = Exception Eligible 8 = Forced eligible from MEDS Hold 9 = Full Month Eligibility (Healthy Families, etc.) 3rd Digit = Timelines/Misc. Information 1 = Regular eligible reported timely 2 = Regular eligible reported retroactively 3 = 3 month retroactive eligible 4 = Continuing eligible reported timely 5 = Continued eligible reported retroactively 6 = Ramos/Pickle/IHSS/Other Extended eligible 7 = Aid Paid Pending Ramos/Myers 8 = Hold from LTC/SOC status 9 = Ineligible or Regular Hold	R

Transaction Trigger Events

SCI OI transaction is triggered in real-time during case creation; rescind case with CIN and case reactivation.

SCI EL transaction is triggered in real-time during case creation; rescind case with CIN and case reactivation. SCI EL transaction is triggered during CIN clearance in SCI Daily update and SAWS S2 batch jobs.

SCI OU transaction is triggered in real-time when person information is updated on the Modify Person screen.

Processing Criteria

For SCI OI transaction, RETURN CODE should be '000.'

For SCI OU transaction, RETURN CODE should be '300.'

For SCI EL/OM transaction, RETURN CODE should be '000' or '300.'

Error Processing

For SCI OI transaction, if RETURN CODE is not '000' then an error message will be displayed based on RETURN CODE value.

For SCI OU transaction, if RETURN CODE is not '300' then an error message will be displayed based on RETURN CODE value.

For SCI EL/OM transaction, if RETURN CODE is not '000' or '300' then an error message will be displayed based on RETURN CODE value.

Refer to [DSD Section 20 - Error Messages](#) - Numbers 21, 51, and 109-132.

Related Components

Business Process Functions

Refer to [Person, Case and State Hearing Search](#).

Business Flows

Refer to [SCI/MEDS Interfaces](#).

Business Rules

Refer to [DSD Section 20 - Business Rules](#) - Numbers 1, 14, 15, 52, 53, 63 – 66 and 68 – 72

Tasks/Notifications

N/A

Screens

Refer to [Create Case Screen Flow Diagram](#).

Refer to [Create Case](#), [Statewide Client Index – CIN Search](#), [Medi-Cal Eligibility Information](#), [CIN data does not match Applicant data](#), [Create case without CIN](#), [Alternate IDs](#), [View Alternate ID](#), [Rescind Case with Client Index Number search](#), [Reactivate Case](#), [Medi-Cal Eligibility List](#), [View Medi-Cal Eligibility](#) and [Share of Cost Details](#).

Reports

N/A

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/External Interfaces/IHSS ESP CM Written Language AMQP Update Msg (IWOM885C)

CI	Document Name
 CI-822430 - DSD EINTF IHSS ESP CM Written Language AMQP Update Msg IWOM885C IMPLEMENTED	DSD_EINTF_IHSS_ESP_CM_Written_Language_AMQP_Update _Msg_IWOM885C.docx

Internal Layout/System Mapping

Data Elements – Event

Source: Cúram		Target: IHSS Website			
Table Name/ File Name /WSDL Name	Field Name	Field Name	Data Type (Format-length)	Description (Data Transformation rules)	R/O (Required or optional)
IWOM885C Message	operationname	operationname	STRING(32)	"modifyWrittenLan"	R
	uuid	uuid	STRING(16)		R
	caseheader. CaseReferenceNumber	payload.recipientid	STRING(16)		R
	concernrolealternateid. alternateid	payload.providerid	STRING(18)		R
	concernrolealternateid. writtenlinaguage	payload. preferredlanguage	STRING(1)	Case management language code	R
	N/A	payload.isprovider	STRING(4)	"true", "false"	R
	N/A	payload.isrecipient	STRING(4)	"true", "false"	R

Data Elements – Response

N/A

Trigger Events

This interface is called when the provider or recipient person Written Language is added or updated within Case Management.

Processing Criteria

N/A

Error Processing

N/A.

Related Components

Business Process Functions

DSD_BF_Create_Referral_Recipient.doc

Business Flows

N/A

Business Rules

Recipient IHSS Website Registration – inactivation and reactivation

Tasks/Notifications

N/A

Screens

Person Home, Modify Person, Create Referral, Create Application, Create Case, Create Provider

Reports

N/A

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Batch Processing

The following Batch Processes will apply to Initial Contact – Intake Application:

No	Batch Process Name	CI	Description	Estimated Size (Records)	Frequency	Send/Receive/Maintenance
1	Address Cleanup	 CI-69327 - DSD BTCH PRO CRM 700aindn IMPLEMENTED	Cleaning temporary address data. During referral creation or application creation if user entered the address data and did not save the referral or application. This process will clean up the unlinked address data either to a referral or an application.	Unknown	Daily	Maintenance
2	Case count	 CI-77970 - DSD BTCH PRO CRM 600aindn IMPLEMENTED	This batch job will run every night and update the case counts for each user in CMIPS. Case count is based on all case statuses other than terminated or denied.	Unknown	Daily	Maintenance
3	Updated Concernrole address foreign key (500AINDN)	 CI-291210 - DSD BTCH PRO CRM p 500aindn IMPLEMENTED	This batch job updates the concern role address foreign key in Concernrole table to match the current address.	N/A	Daily	Maintenance
4	Updated Concernrole case status foreign key (500CINDN)	 CI-291220 - DSD BTCH PRO CRM p 500cindn IMPLEMENTED	This batch job updates the concern role case status foreign key of Concernrole table to match the current case status.	N/A	Daily	Maintenance
5	Updated Concernrole phone number foreign key (500BINDN)	 CI-291224 - DSD BTCH PRO CRM p 500bindn IMPLEMENTED	This batch job updates the concern role phone number foreign key of Concernrole table to match the current phone number.	N/A	Daily	Maintenance
6	Fetch In Progress Bulk Case Load Triggers (701MINDN)	 CI-818775 - DSD BTCH PRO CRM p 701mindn IMPLEMENTED	This batch job fetches all the in progress Bulk Case Load triggers and cleans up all the associated tasks.	N/A	Daily	Maintenance
7	Address Special Characters Clean Up (700DINRN)	 CI-824423 - DSD BTCH PRO CRM 700dinnr IMPLEMENTED	This batch job will clean up current addresses where there is at least one unwanted special character present in either the Residence or Mailing Address of a Provider, Recipient or Contact.	N/A	Ad Hoc	Maintenance

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Reporting

See DSD Section 28A, 28B, 28C or 28D for all CMIP Reports.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Forms

See DSD Section 31A, 31B or 31C for CMIPS Forms.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions

This section will document each of the code tables and their values and descriptions that will be utilized by the CMIPS Application. Examples of CMIPS code tables are Provider pay rates, county names, address types, or family relationship types.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Person Type

CI	Document Name
 CI-68065 - DSD CT Person Type IMPLEMENTED	DSD_CT_Person_Type.doc

Table - Code Table: Person Type

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
PER001	Recipient	No	1	No	Yes	
PER002	Provider	No	2	No	Yes	
PER003	Applicant	No	3	No	Yes	
PER004	Open Referral	No	4	No	Yes	
PER005	Closed Referral	No	5	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Gender

CI	Document Name
 CI-68064 - DSD CT Gender IMPLEMENTED	DSD_CT_Gender.doc

Table - Code Table: Gender

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SX1	Male	No	1	No	Yes	
SX2	Female	No	2	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Payroll Gender

CI	Document Name
 CI-68067 - DSD CT PayRollGender-child code table to Gender IMPLEMENTED	DSD_CT_PayRollGender-child_code_table_to_Gender.doc

Table – Code Table: PayRollGender (Child Code Table to Gender)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
M	Male	No	1	SX1	No	
F	Female	No	2	SX2	No	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/County

CI	Document Name
CI-68046 - DSD CT County IMPLEMENTED	DSD_CT_County.doc

Table - Code Table: County

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
01	Alameda	No	1	No	Yes	
02	Alpine	No	2	No	Yes	
03	Amador	No	3	No	Yes	
04	Butte	No	4	No	Yes	
05	Calaveras	No	5	No	Yes	
06	Colusa	No	6	No	Yes	
07	Contra Costa	No	7	No	Yes	
08	Del Norte	No	8	No	Yes	
09	El Dorado	No	9	No	Yes	
10	Fresno	No	10	No	Yes	
11	Glenn	No	11	No	Yes	
12	Humboldt	No	12	No	Yes	
13	Imperial	No	13	No	Yes	
14	Inyo	No	14	No	Yes	
15	Kern	No	15	No	Yes	
16	Kings	No	16	No	Yes	
17	Lake	No	17	No	Yes	
18	Lassen	No	18	No	Yes	
19	Los Angeles	No	19	No	Yes	
20	Madera	No	20	No	Yes	
21	Marin	No	21	No	Yes	
22	Mariposa	No	22	No	Yes	
23	Mendocino	No	23	No	Yes	
24	Merced	No	24	No	Yes	
25	Modoc	No	25	No	Yes	
26	Mono	No	26	No	Yes	
27	Monterey	No	27	No	Yes	
28	Napa	No	28	No	Yes	
29	Nevada	No	29	No	Yes	
30	Orange	No	30	No	Yes	
31	Placer	No	31	No	Yes	
32	Plumas	No	32	No	Yes	
33	Riverside	No	33	No	Yes	
34	Sacramento	No	34	No	Yes	
35	San Benito	No	35	No	Yes	

36	San Bernardino	No	36	No	Yes	
37	San Diego	No	37	No	Yes	
38	San Francisco	No	38	No	Yes	
39	San Joaquin	No	39	No	Yes	
40	San Luis Obispo	No	40	No	Yes	
41	San Mateo	No	41	No	Yes	
42	Santa Barbara	No	42	No	Yes	
43	Santa Clara	No	43	No	Yes	
44	Santa Cruz	No	44	No	Yes	
45	Shasta	No	45	No	Yes	
46	Sierra	No	46	No	Yes	
47	Siskiyou	No	47	No	Yes	
48	Solano	No	48	No	Yes	
49	Sonoma	No	49	No	Yes	
50	Stanislaus	No	50	No	Yes	
51	Sutter	No	51	No	Yes	
52	Tehama	No	52	No	Yes	
53	Trinity	No	53	No	Yes	
54	Tulare	No	54	No	Yes	
55	Tuolumne	No	55	No	Yes	
56	Ventura	No	56	No	Yes	
57	Yolo	No	57	No	Yes	
58	Yuba	No	58	No	Yes	
59	All	Yes	59	No	Yes	
60	Out of State	Yes	60	No	Yes	
99	Undetermined at Conversion	Yes	61	No	No	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/State Hearing Status

CI	Document Name
 CI-68051 - DSD CT Search State Hearing Status IMPLEMENTED	DSD_CT_Search_State_Hearing_Status.doc

Table - Code Table: Search State Hearing Status

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SSHS001	Requested	No	1	No	Yes	
SSHS002	Scheduled	No	2	No	Yes	
SSHS003	Resolved	No	3	No	Yes	
SSHS004	Requested And Scheduled	No	4	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Person Title

CI	Document Name
CI-68049 - DSD CT Title-Name IMPLEMENTED	DSD_CT_Title-Name.doc

Table - Code Table: PersonTitle

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	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Suffix (Name)

CI	Document Name
 CI-68061 - DSD CT Suffix-Name IMPLEMENTED	DSD_CT_Suffix-Name.doc

Table - Code Table: Suffix (Name)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SFX001	Jr.	No	1	No	Yes	
SFX002	Sr.	No	2	No	Yes	
SFX003	I	No	3	No	Yes	
SFX004	II	No	4	No	Yes	
SFX005	III	No	5	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Payroll Suffix

CI	Document Name
 CI-67996 - DSD CT PayRollSuffix IMPLEMENTED	DSD_CT_PayRollSuffix.doc

Table: Code Table: PayRollSuffix (Child Code Table to Suffix)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
JR	Jr.	No	1	SFX001	No	
SR	Sr.	No	2	SFX002	No	
I	I	No	3	SFX003	No	
II	II	No	4	SFX004	No	
III	III	No	5	SFX005	No	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Meets Residency Requirements

CI	Document Name
 CI-68063 - DSD CT Meets Residency Requirements IMPLEMENTED	DSD_CT_Meets_Residency_Requirements.doc

Table: Code Table: Meets Residency Requirements

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
MRR001	Met	No	1	No	Yes	
MRR002	Living in Home of Relative receiving Board & Care Rate	No	2	No	Yes	Only used on Case Denial
MRR003	Non-California Residency	No	3	No	Yes	Denial or Termination
MRR004	Not living in own home	No	4	No	Yes	Denial or Termination
MRR005	Whereabouts unknown	No	5	No	Yes	Denial or Termination
MRR006	Converted Case	No	6	No	No	For terminated, denied or record cases (T, D or R) status at conversion time.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Referral Source

CI	Document Name
CI-68069 - DSD CT Referral Source IMPLEMENTED	DSD_CT_Referral_Source.doc

Table: Code Table: Referral Source

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
RFS001	Self	No	1	No	Yes	
RFS002	Adult Daughter	No	2	No	Yes	
RFS003	Other	No	3	No	Yes	
RFS004	Other Relative	No	4	No	Yes	
RFS005	Friend	No	5	No	Yes	
RFS006	County Social Service Worker	No	6	No	Yes	
RFS007	Mother	No	7	No	Yes	
RFS008	Other Community Agency	No	8	No	Yes	
RFS009	Adult Son	No	9	No	Yes	
RFS010	Home Health Agency	No	10	No	Yes	
RFS011	Social Security Administration	No	11	No	Yes	
RFS012	Unknown	No	12	No	Yes	
RFS013	Regional Center	No	13	No	Yes	
RFS014	Spouse	No	14	No	Yes	
RFS015	Hospital Discharge Planner	No	15	No	Yes	
RFS016	Physician	No	16	No	Yes	
RFS017	Neighbor	No	17	No	Yes	
RFS018	Adult Day Health Care Center	No	18	No	Yes	
RFS019	Father	No	19	No	Yes	
RFS020	Area Agency on Aging	No	20	No	Yes	
RFS021	Community Care Facility	No	21	No	Yes	
RFS022	Health Services Department	No	22	No	Yes	
RFS023	Senior Center	No	23	No	Yes	
RFS024	County Eligibility Worker	No	24	No	Yes	
RFS025	Mental Health Department	No	25	No	Yes	
RFS026	Multi-Purpose Senior Services Program	No	26	No	Yes	
RFS027	Early Hospital Discharge (Diagnostically Related Group)	No	27	No	Yes	
RFS028	Linkage Program	No	28	No	Yes	
RFS029	Medi-Cal Review (AB 3398)	No	29	No	Yes	
RFS030	Skilled Nursing Facility Discharge Planner	No	30	No	Yes	
RFS031	Rehabilitation Department	No	31	No	Yes	
RFS032	Reported Adult Abuse	No	32	No	Yes	
RFS033	Senior Day Care Center	No	33	No	Yes	
RFS034	Guardian	No	34	No	Yes	
RFS035	Religious Organization	No	35	No	Yes	

RFS036	Intermediate Care Facility Discharge Planner	No	36	No	Yes	
RFS037	Preadmission Screening (Gatekeeper)	No	37	No	Yes	
RFS038	Law Enforcement	No	38	No	Yes	
RFS039	Conservator	No	39	No	Yes	
RFS040	Nutrition Center	No	40	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Ethnicity

CI	Document Name
CI-68068 - DSD CT Ethnicity IMPLEMENTED	DSD_CT_Ethnicity.doc

Table: Code Table: Ethnicity

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
1	White	No	1	No	Yes	
2	Hispanic	No	2	No	Yes	
3	Black	No	3	No	Yes	
4	Asian or Pacific Islander	No	4	No	Yes	
5	Alaskan Native or American Indian	No	5	No	Yes	
7	Filipino	No	6	No	Yes	
8	No Valid Data Reported	No	7	No	Yes	
9	No Response; client declined to state	No	8	No	Yes	
A	Amerasian	No	9	No	Yes	
C	Chinese	No	10	No	Yes	
H	Cambodian	No	11	No	Yes	
J	Japanese	No	12	No	Yes	
K	Korean	No	13	No	Yes	
M	Samoan	No	14	No	Yes	
N	Asian Indian	No	15	No	Yes	
P	Hawaiian	No	16	No	Yes	
R	Guamanian	No	17	No	Yes	
T	Laotian	No	18	No	Yes	
V	Vietnamese	No	19	No	Yes	
Z	Other	No	20	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Spoken Language

CI	Document Name
CI-68048 - DSD CT Spoken Language IMPLEMENTED	DSD_CT_Spoken_Language.doc

Table: Code Table: Spoken Language

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
0	American Sign Language	No	1	No	Yes	
1	Spanish	No	2	No	Yes	
2	Cantonese	No	3	No	Yes	
3	Japanese	No	4	No	Yes	
4	Korean	No	5	No	Yes	
5	Tagalog	No	6	No	Yes	
6	Other Non-English	No	7	No	Yes	
7	English	No	8	No	Yes	
8	No Valid Data Reported	No	9	No	Yes	
9	No response; client declined to state	No	10	No	Yes	
A	Other Sign Language	No	11	No	Yes	
B	Mandarin	No	12	No	Yes	
C	Other Chinese Languages	No	13	No	Yes	
D	Cambodian	No	14	No	Yes	
E	Armenian	No	15	No	Yes	
F	Ilocano	No	16	No	Yes	
G	Mien	No	17	No	Yes	
H	Hmong	No	18	No	Yes	
I	Lao	No	19	No	Yes	
J	Turkish	No	20	No	Yes	
K	Hebrew	No	21	No	Yes	
L	French	No	22	No	Yes	
M	Polish	No	23	No	Yes	
N	Russian	No	24	No	Yes	
P	Portuguese	No	25	No	Yes	
Q	Italian	No	26	No	Yes	
R	Arabic	No	27	No	Yes	
S	Samoan	No	28	No	Yes	
T	Thai	No	29	No	Yes	
U	Farsi	No	30	No	Yes	
V	Vietnamese	No	31	No	Yes	
W	Hindi	No	32	No	Yes	
X	Punjabi	No	33	No	Yes	
Y	Ukrainian	No	34	No	Yes	
CONV	No Value at conversion	No	35	No	No	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Written Language

CI	Document Name
CI-68054 - DSD CT Written Language IMPLEMENTED	DSD_CT_Written_Language.doc

Table: Code Table: Written Language

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
1	Spanish	No	1	No	Yes	
2	Cantonese	No	2	No	Yes	
3	Japanese	No	3	No	Yes	
4	Korean	No	4	No	Yes	
5	Tagalog	No	5	No	Yes	
6	Other Non-English	No	6	No	Yes	
7	English	No	7	No	Yes	
8	No Valid Data Reported	No	8	No	Yes	
9	No response, client declined to state	No	9	No	Yes	
B	Mandarin	No	10	No	Yes	
C	Other Chinese Languages	No	11	No	Yes	
D	Cambodian	No	12	No	Yes	
E	Armenian	No	13	No	Yes	
F	Ilocano	No	14	No	Yes	
G	Mien	No	15	No	Yes	
H	Hmong	No	16	No	Yes	
I	Lao	No	17	No	Yes	
J	Turkish	No	18	No	Yes	
K	Hebrew	No	19	No	Yes	
L	French	No	20	No	Yes	
M	Polish	No	21	No	Yes	
N	Russian	No	22	No	Yes	
P	Portuguese	No	23	No	Yes	
Q	Italian	No	24	No	Yes	
R	Arabic	No	25	No	Yes	
S	Samoan	No	26	No	Yes	
T	Thai	No	27	No	Yes	
U	Farsi	No	28	No	Yes	
V	Vietnamese	No	29	No	Yes	
W	Hindi	No	30	No	Yes	
X	Punjabi	No	31	No	Yes	
Y	Ukrainian	No	32	No	Yes	
CONV	No Value at conversion	No	33	No	No	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Address Type

CI	Document Name
 CI-68056 - DSD CT Address Type IMPLEMENTED	DSD_CT_Address_Type.doc

Table: Code Table: Address Type

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
PAT1	Residential	No	1	No	Yes	
AT4	Mailing	No	2	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Residence Address Type

CI	Document Name
 CI-68043 - DSD CT Residence Address Type IMPLEMENTED	DSD_CT_Residence_Address_Type.doc

Table: Code Table: Residence Address Type

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
RAT001	Street Address	Yes	1	No	Yes	
RAT002	Rural Route Address	No	2	No	Yes	
RAT003	Highway Address	No	3	No	Yes	
RAT004	Other Address	No	4	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Mailing Address Type

CI	Document Name
 CI-68066 - DSD CT Mailing Address Type IMPLEMENTED	DSD_CT_Mailing_Address_Type.doc

Table: Code Table: Mailing Address Type

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
ADT001	Street Address	No	1	No	Yes	
ADT002	PO Box Number	No	2	No	Yes	
ADT003	Rural Route Address	No	3	No	Yes	
ADT004	General Delivery	No	4	No	Yes	
ADT005	Highway Address	No	5	No	Yes	
ADT006	Other Address	No	6	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Pre (Street)

CI	Document Name
 CI-68062 - DSD CT Pre-Street IMPLEMENTED	DSD_CT_Pre-Street.doc

Table: Code Table: Pre (Street)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
E	East	No	1	No	Yes	
N	North	No	2	No	Yes	
NE	North-East	No	3	No	Yes	
NW	North-West	No	4	No	Yes	
S	South	No	5	No	Yes	
SE	South-East	No	6	No	Yes	
SW	South-West	No	7	No	Yes	
W	West	No	8	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Street Suffix

CI	Document Name
CI-68057 - DSD CT Suffix-Street IMPLEMENTED	DSD_CT_Suffix-Street.doc

Table: Code Table: Suffix (Street)

Code Value	Description	Default Value	Sort Order	Parent Code	Enabled	Notes
ALY	Alley	No	1	No	Yes	
ANX	Annex	No	2	No	Yes	
ARC	Arcade	No	3	No	Yes	
AVE	Avenue	No	4	No	Yes	
BCH	Beach	No	5	No	Yes	
BG	Burg	No	6	No	Yes	
BGS	Burgs	No	7	No	Yes	
BLF	Bluff	No	8	No	Yes	
BLFS	Bluffs	No	9	No	Yes	
BLVD	Boulevard	No	10	No	Yes	
BND	Bend	No	11	No	Yes	
BRCH	Branch	No	12	No	Yes	
BRDG	Bridge	No	13	No	Yes	
BRK	Brook	No	14	No	Yes	
BRKS	Brooks	No	15	No	Yes	
BTM	Bottom	No	16	No	Yes	
BYPS	Bypass	No	17	No	Yes	
BYU	Bayou	No	18	No	Yes	
CIR	Circle	No	19	No	Yes	
CLB	Club	No	20	No	Yes	
CLF	Cliff	No	21	No	Yes	
CLFS	Cliffs	No	22	No	Yes	
COM	Common	No	23	No	Yes	
CP	Camp	No	24	No	Yes	
CPE	Cape	No	25	No	Yes	
CRD	Crossroad	No	26	No	Yes	
CRDS	Crossroads	No	27	No	Yes	
CRES	Crescent	No	28	No	Yes	
CRK	Creek	No	29	No	Yes	
CRNR	Corner	No	30	No	Yes	
CRSE	Course	No	31	No	Yes	
CRSG	Crossing	No	32	No	Yes	
CSWY	Causeway	No	33	No	Yes	
CT	Court	No	34	No	Yes	
CTR	Center	No	35	No	Yes	

CUR	Curve	No	36	No	Yes	
CV	Cove	No	37	No	Yes	
CYN	Canyon	No	38	No	Yes	
DM	Dam	No	39	No	Yes	
DR	Drive	No	40	No	Yes	
DV	Divide	No	41	No	Yes	
EST	Estate	No	42	No	Yes	
EXPY	Expressway	No	43	No	Yes	
EXT	Extension	No	44	No	Yes	
FALL	Fall	No	45	No	Yes	
FLD	Field	No	46	No	Yes	
FLS	Falls	No	47	No	Yes	
FLT	Flat	No	48	No	Yes	
FRD	Ford	No	49	No	Yes	
FRDS	Fords	No	50	No	Yes	
FRG	Forge	No	51	No	Yes	
FRGS	Forges	No	52	No	Yes	
FRK	Fork	No	53	No	Yes	
FRKS	Forks	No	54	No	Yes	
FRST	Forest	No	55	No	Yes	
FRY	Ferry	No	56	No	Yes	
FT	Fort	No	57	No	Yes	
FWY	Freeway	No	58	No	Yes	
GDN	Garden	No	59	No	Yes	
GDNS	Gardens	No	60	No	Yes	
GLN	Glens	No	61	No	Yes	
GN	Glen	No	62	No	Yes	
GRN	Green	No	63	No	Yes	
GRNS	Greens	No	64	No	Yes	
GRV	Grove	No	65	No	Yes	
GRVS	Groves	No	66	No	Yes	
GTWY	Gateway	No	67	No	Yes	
HBR	Harbor	No	68	No	Yes	
HL	Hill	No	69	No	Yes	
HLS	Hills	No	70	No	Yes	
HOLW	Hallow	No	71	No	Yes	
HTS	Heights	No	72	No	Yes	
HVN	Haven	No	73	No	Yes	
HWY	Highway	No	74	No	Yes	
INLT	Inlet	No	75	No	Yes	
IS	Island	No	76	No	Yes	
ISLE	Isle	No	77	No	Yes	
JCT	Junction	No	78	No	Yes	
JCTS	Junctions	No	79	No	Yes	
KNL	Knoll	No	80	No	Yes	
KNLS	Knolls	No	81	No	Yes	
KY	Key	No	82	No	Yes	

KYS	Keys	No	83	No	Yes	
LAND	Land	No	84	No	Yes	
LCK	Lock	No	85	No	Yes	
LDG	Lodge	No	86	No	Yes	
LF	Loaf	No	87	No	Yes	
LGT	Light	No	88	No	Yes	
LK	Lake	No	89	No	Yes	
LKS	Lakes	No	90	No	Yes	
LN	Lane	No	91	No	Yes	
LNDG	Landing	No	92	No	Yes	
LOOP	Loop	No	93	No	Yes	
LPS	Loops	No	94	No	Yes	
MALL	Mall	No	95	No	Yes	
MDW	Meadow	No	96	No	Yes	
MDWS	Meadows	No	97	No	Yes	
MEWS	Mews	No	98	No	Yes	
ML	Mill	No	99	No	Yes	
MLS	Mills	No	100	No	Yes	
MNR	Manor	No	101	No	Yes	
MNRS	Manors	No	102	No	Yes	
MSN	Mission	No	103	No	Yes	
MT	Mount	No	104	No	Yes	
MTN	Mountain	No	105	No	Yes	
MTWY	Motorway	No	106	No	Yes	
NCK	Neck	No	107	No	Yes	
OPAS	Overpass	No	108	No	Yes	
ORCH	Orchard	No	109	No	Yes	
OVAL	Oval	No	110	No	Yes	
PARK	Park	No	111	No	Yes	
PASS	Pass	No	112	No	Yes	
PATH	Path	No	113	No	Yes	
PIKE	Pike	No	114	No	Yes	
PINE	Pine	No	115	No	Yes	
PKS	Parks	No	116	No	Yes	
PKWY	Parkway	No	117	No	Yes	
PL	Place	No	118	No	Yes	
PLN	Plain	No	119	No	Yes	
PLNS	Plains	No	120	No	Yes	
PLZ	Plaza	No	121	No	Yes	
PNES	Pines	No	122	No	Yes	
PR	Prairie	No	123	No	Yes	
PRT	Port	No	124	No	Yes	
PRTS	Ports	No	125	No	Yes	
PSGE	Passage	No	126	No	Yes	
PT	Point	No	127	No	Yes	
PTS	Points	No	128	No	Yes	
RADL	Radial	No	129	No	Yes	

RAMP	Ramp	No	130	No	Yes	
RD	Road	No	131	No	Yes	
RDEX	Road Extension	No	132	No	Yes	
RDG	Ridge	No	133	No	Yes	
RDGS	Ridges	No	134	No	Yes	
RIV	River	No	135	No	Yes	
RNCH	Ranch	No	136	No	Yes	
RPD	Rapid	No	137	No	Yes	
RST	Rest	No	138	No	Yes	
RTE	Route	No	139	No	Yes	
RUE	Rue	No	140	No	Yes	
RUN	Run	No	141	No	Yes	
RW	Row	No	142	No	Yes	
SHL	Shoal	No	143	No	Yes	
SHLS	Shoals	No	144	No	Yes	
SHR	Shore	No	145	No	Yes	
SKWY	Skyway	No	146	No	Yes	
SMT	Summit	No	147	No	Yes	
SPG	Spring	No	148	No	Yes	
SPGS	Springs	No	149	No	Yes	
SPUR	Spur	No	150	No	Yes	
SQ	Square	No	151	No	Yes	
ST	Street	No	152	No	Yes	
STA	Station	No	153	No	Yes	
STRA	Street Avenue	No	154	No	Yes	
STRM	Stream	No	155	No	Yes	
TER	Terrace	No	156	No	Yes	
TPKE	Turnpike	No	157	No	Yes	
TRAK	Track	No	158	No	Yes	
TRCE	Trace	No	159	No	Yes	
TRFY	Trafficway	No	160	No	Yes	
TRL	Trail	No	161	No	Yes	
TRWY	Throughway	No	162	No	Yes	
TUNL	Tunnel	No	163	No	Yes	
UN	Union	No	164	No	Yes	
UNS	Unions	No	165	No	Yes	
UPAS	Underpass	No	166	No	Yes	
VIA	Viaduct	No	167	No	Yes	
VIS	Vista	No	168	No	Yes	
VL	Ville	No	169	No	Yes	
VLG	Village	No	170	No	Yes	
VLGS	Villages	No	171	No	Yes	
VLY	Valley	No	172	No	Yes	
VLYS	Valleys	No	173	No	Yes	
VW	View	No	174	No	Yes	
VWS	Views	No	175	No	Yes	
WALK	Walk	No	176	No	Yes	

WALL	Wall	No	177	No	Yes	
WAY	Way	No	178	No	Yes	
WL	Well	No	179	No	Yes	
WLKS	Walks	No	180	No	Yes	
WLS	Wells	No	181	No	Yes	
WYPL	Way Place	No	182	No	Yes	
XING	Crossing	No	183	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Post (Street)

CI	Document Name
 CI-68052 - DSD CT Post-Street IMPLEMENTED	DSD_CT_Post-Street.doc

Table: Code Table: Post (Street)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
E	East	No	1	No	Yes	
N	North	No	2	No	Yes	
NE	North-East	No	3	No	Yes	
NW	North-West	No	4	No	Yes	
S	South	No	5	No	Yes	
SE	South-East	No	6	No	Yes	
SW	South-West	No	7	No	Yes	
W	West	No	8	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Unit Type

CI	Document Name
CI-68050 - DSD CT Unit Type-Address IMPLEMENTED	DSD_CT_Unit_Type-Address.doc

Table: Code Table: Unit Type (Address)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
APT	Apartment	No	1	No	Yes	
BLDG	Building	No	2	No	Yes	
BSMT	Basement	No	3	No	Yes	
DEPT	Department	No	4	No	Yes	
FL	Floor	No	5	No	Yes	
FRNT	Front	No	6	No	Yes	
HNGR	Hangar	No	7	No	Yes	
LBBY	Lobby	No	8	No	Yes	
LOT	Lot	No	9	No	Yes	
LOWR	Lower	No	10	No	Yes	
OFC	Office	No	11	No	Yes	
PIER	Pier	No	12	No	Yes	
PMB	Post Mail Box	No	13	No	Yes	
REAR	Rear	No	14	No	Yes	
RM	Room	No	15	No	Yes	
SIDE	Side	No	16	No	Yes	
SLIP	Slip	No	17	No	Yes	
SPC	Space	No	18	No	Yes	
STE	Suite	No	19	No	Yes	
STOP	Stop	No	20	No	Yes	
TRLR	Trailer	No	21	No	Yes	
UNIT	Unit	No	22	No	Yes	
UPPR	Upper	No	23	No	Yes	
#	Number	No	24	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/State

CI	Document Name
CI-68047 - DSD CT State	DSD_CT_State.doc

Table: Code Table: State

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
AK	Alaska	No	1	No	Yes	
AL	Alabama	No	2	No	Yes	
AR	Arkansas	No	3	No	Yes	
AS	American Samoa	No	4	No	Yes	
AZ	Arizona	No	5	No	Yes	
CA	California	No	6	No	Yes	
CO	Colorado	No	7	No	Yes	
CT	Connecticut	No	8	No	Yes	
DC	District of Columbia	No	9	No	Yes	
DE	Delaware	No	10	No	Yes	
FL	Florida	No	11	No	Yes	
FM	Federated States of Micronesia	No	12	No	Yes	
GA	Georgia	No	13	No	Yes	
GU	Guam	No	14	No	Yes	
HI	Hawaii	No	15	No	Yes	
IA	Iowa	No	16	No	Yes	
ID	Idaho	No	17	No	Yes	
IL	Illinois	No	18	No	Yes	
IN	Indiana	No	19	No	Yes	
KS	Kansas	No	20	No	Yes	
KY	Kentucky	No	21	No	Yes	
LA	Louisiana	No	22	No	Yes	
MA	Massachusetts	No	23	No	Yes	
MD	Maryland	No	24	No	Yes	
ME	Maine	No	25	No	Yes	
MI	Michigan	No	26	No	Yes	
MN	Minnesota	No	27	No	Yes	
MO	Missouri	No	28	No	Yes	
MS	Mississippi	No	29	No	Yes	
MT	Montana	No	30	No	Yes	
NC	North Carolina	No	31	No	Yes	
ND	North Dakota	No	32	No	Yes	
MP	Northern Mariana Islands	No	33	No	Yes	
NE	Nebraska	No	34	No	Yes	
NH	New Hampshire	No	35	No	Yes	

NJ	New Jersey	No	36	No	Yes	
NM	New Mexico	No	37	No	Yes	
NV	Nevada	No	38	No	Yes	
NY	New York	No	39	No	Yes	
OH	Ohio	No	40	No	Yes	
OK	Oklahoma	No	41	No	Yes	
OR	Oregon	No	42	No	Yes	
PA	Pennsylvania	No	43	No	Yes	
PR	Puerto Rico	No	44	No	Yes	
RI	Rhode Island	No	45	No	Yes	
SC	South Carolina	No	46	No	Yes	
SD	South Dakota	No	47	No	Yes	
TN	Tennessee	No	48	No	Yes	
TX	Texas	No	49	No	Yes	
UT	Utah	No	50	No	Yes	
VA	Virginia	No	51	No	Yes	
VI	Virgin Islands	No	52	No	Yes	
VT	Vermont	No	53	No	Yes	
WA	Washington	No	54	No	Yes	
WI	Wisconsin	No	55	No	Yes	
WV	West Virginia	No	56	No	Yes	
WY	Wyoming	No	57	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Type (Phone)

CI	Document Name
 CI-68059 - DSD CT Type-Phone IMPLEMENTED	DSD_CT_Type-Phone.doc

Table: Code Table: Type (Phone)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
PH1	Personal	No	1	No	Yes	
PH2	Business	No	2	No	Yes	
PH3	Mobile	No	3	No	Yes	
PH4	Fax	No	4	No	Yes	
PH5	Pager	No	5	No	Yes	
PH6	Other	No	6	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Type (Alternate ID)

CI	Document Name
 CI-68044 - DSD CT Type-Alternate ID IMPLEMENTED	DSD_CT_Type-Alternate_ID.doc

Table: Code Table: Type (Alternate ID)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
CA1	SSN	No	1	No	Yes	OOTB Code Value
ATI001	MEDS ID	No	None	No	No	Will be populated from: <ul style="list-style-type: none">• SCI OM Transaction• SAWS S2 Daily Receive transaction
ATI002	CIN	No	None	No	Yes	Will be populated from any of the following: <ul style="list-style-type: none">• the SCI OM Transaction (CIN Clearance)• The SAWS S2 Daily Receive transaction• Daily SCI updates
ATI003	Legacy (ten-digit) Recipient ID	No	None	No	No	Will be set at Conversion with the legacy 10-digit Recipient case number
ATI004	Provider Number	No	None	No	No	Provider number
ATI005	Legacy (sixteen-digit) Provider ID	No	None	No	No	Will be set at Conversion with the legacy 16-digit Provider number
ATI006	Conversion Duplicate	No	None	No	No	Will be set a Conversion if Person SSN matches an existing
ATI007	Taxpayer ID	No	2	No	Yes	Taxpayer ID (Recipient Only)

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Sensitivity

CI	Document Name
 CI-68058 - DSD CT Sensitivity IMPLEMENTED	DSD_CT_Sensitivity.doc

Table: Code Table: Sensitivity

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
1	1	Yes	1	No	Yes	
2	2	No	2	No	Yes	
3	3	No	3	No	Yes	
4	4	No	4	No	Yes	
5	5	No	5	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Priority

CI	Document Name
CI-68045 - DSD CT Priority IMPLEMENTED	DSD_CT_Priority.doc

Table: Code Table: Priority

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
PTY001	Low	No	1	No	Yes	
PTY002	Medium	Yes	2	No	Yes	
PTY003	High	No	3	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Death Notification Source

CI	Document Name
 CI-68042 - DSD CT DeathNotificationSource IMPLEMENTED	DSD_CT_DeathNotificationSource.doc

Table: Code Table: DeathNotificationSource

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
DNS001	MEDS	No	1	No	No	System Generated
DNS002	CDPH Interface	No	2	No	No	System Generated
DNS003	SCO Interface	No	3	No	No	System Generated
DNS004	Family Member	No	4	No	Yes	Selectable by User
DNS005	Other	No	5	No	Yes	Selectable by User
DNS006	SSA	No	6	No	No	Selectable by User

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/MEDS Transaction Type

CI	Document Name
 CI-68055 - DSD CT MEDSTransaction Type IMPLEMENTED	DSD_CT_MEDSTransaction_Type.doc

Table: Code Table: MEDSTransactionType

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
1	MEDS Monthly Renewal Eligibility Record	No	2	No	Yes	
2	New IHSS/PCSP Eligibility Reported	No	3	No	Yes	
3	Medi-Cal Eligibility Reported For Existing IHSS/PCSP Eligible	No	4	No	Yes	
4	Medi-Cal Case Number Change Reported On Existing IHSS/PCSP Eligible	No	5	No	Yes	
5	Medi-Cal SOC Amount Change Reported On Existing IHSS/PCSP Eligible	No	6	No	Yes	
6	SCI – OM Transaction	No	1	No	Yes	
N	No MEDS Eligibility	No	7	No	Yes	
7	Manual Update	No	N/A	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Blank SSN Reason

CI	Document Name
 CI-117920 - DSD CT BlankSSNReason IMPLEMENTED	DSD_CT_BankSSNReason.doc

Table: Code Table: BlankSSNReason

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
BSR001	Applied For SSN/ITIN	No	1	No	Yes	
BSR002	Duplicate Research	No	2	No	No	Disabled with CAT-3167

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Duplicates (Alternative ID SSN Type)

CI	Document Name
 CI-117921 - DSD CT Duplicates Alternative ID Type SSN IMPLEMENTED	DSD_CT_Duplicates_Alternative_ID_Type_SSN.doc

Table: Code Table: Duplicates (Alternative ID Type SSN)

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
ATD001	Duplicate SSN	No	1	No	Yes	
ATD002	Suspect SSN	No	2	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Gender Identity

CI	Document Name
 CI-790282 - DSD CT Gender Identity IMPLEMENTED	DSD_CT_Gender_Identity.docx

Table – Code Table: Gender Identity

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SGI001	Male	N	1	N	Yes	
SGI002	Female	N	2	N	Yes	
SGI003	Transgender Male to Female	N	3	N	Yes	
SGI004	Transgender Female to Male	N	4	N	Yes	
SGI005	Another Gender Identity	N	5	N	Yes	
SGI006	Decline to State	N	6	N	Yes	
SGI007	Non-Binary	N	7	N	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Sexual Orientation

CI	Document Name
 CI-790283 - DSD CT Sexual Orientation IMPLEMENTED	DSD_CT_Sexual_Orientation.docx

Table – Code Table: Sexual Orientation

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SXO001	Straight or Heterosexual	N	1	N	Yes	
SXO002	Gay or Lesbian	N	2	N	Yes	
SXO003	Bisexual	N	3	N	Yes	
SXO004	Queer	N	4	N	Yes	
SXO005	Another Sexual Orientation	N	5	N	Yes	
SXO006	Decline to State	N	6	N	Yes	
SXO007	Unknown	N	7	N	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/MEDS Citizen Document Type

CI
CI-822523 - DSD CT MEDSCitizenDocType IMPLEMENTED

Table: Code Table: MEDSCitizenDocType

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
BR	Birth Records Match Requested for Client Born in California	N/A	1	N/A	Yes	
1A	United States Passport - issued without limitation	N/A	2	N/A	Yes	
1B	Certificate of Naturalization (Form N-550 or N-570)	N/A	3	N/A	Yes	
1C	Certificate of Citizenship (Form N-560 or N-561)	N/A	4	N/A	Yes	
2A	U.S. Public Birth Record issued before age 5 showing birth in one of the 50 U.S. states, the District of Columbia, American Samoa, Swains Island	N/A	5	N/A	Yes	
2B	U.S. Citizenship Based on Collective Naturalization for certain citizens or residents of Puerto Rico, U.S. Virgin Islands or Northern Mariana	N/A	6	N/A	Yes	
2C	Certification of Report of Birth (DS-1350)	N/A	7	N/A	Yes	
2D	Consular Report of Birth Abroad of a Citizen of the United States of America (FS-240)	N/A	8	N/A	Yes	
2E	Certification of Birth Abroad (Form FS-545)	N/A	9	N/A	Yes	
2F	U.S. Citizen I.D. Card (Form I-197 or I-179)	N/A	10	N/A	Yes	
2G	Northern Mariana Identification Card (I-873)	N/A	11	N/A	Yes	
2H	American Indian Card (I-872) issued by the Department of Homeland Security with the classification code KIC	N/A	12	N/A	Yes	
2I	Final Adoption Decree showing the child's name and a U.S. place of birth	N/A	13	N/A	Yes	
2J	Evidence of U.S. Government civil service employment before 6/1/76	N/A	14	N/A	Yes	
2K	Official U.S. Military record of service (e.g., DD-214 or similar official document) showing a U.S. place of birth	N/A	15	N/A	Yes	
2L	Proof of adoption under the Child Citizenship Act for a child born outside the U.S.	N/A	16	N/A	Yes	
2M	U.S. Citizenship verified via Systematic Alien Verification for Entitlements (SAVE)	N/A	17	N/A	Yes	
2Z	SSA confirmed U.S. Citizenship consistent with SSA data via State Verification Exchange System (SVES)	N/A	18	N/A	Yes	
3A	Extract of a hospital record on hospital letterhead established at the time of the person's birth showing a U.S. place of birth and created at least	N/A	19	N/A	Yes	
3B	Life or health or other insurance record showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date	N/A	20	N/A	Yes	
3C	Religious record showing a U.S. place of birth recorded within 3 months of birth	N/A	21	N/A	Yes	
3D	Early school record showing a U.S. place of birth	N/A	22	N/A	Yes	
4A	Federal or State census record showing U.S. citizenship or a U.S. place of birth and the person's age (generally for persons born 1900 through 1950)	N/A	23	N/A	Yes	
4B	Seneca Indian tribal census record showing a U.S. place of birth and created at least 5 years before the initial Medicaid application date	N/A	24	N/A	Yes	
4C	Bureau of Indian Affairs tribal census record of the Navaho Indians showing a U.S. place of birth and created at least 5 years before the initial	N/A	25	N/A	Yes	
4D	U.S. State Vital Statistics official notification of birth registration showing a U.S. place of birth and created at least 5 years before the	N/A	26	N/A	Yes	
4E	An amended U.S. public birth record amended more than 5 years after the person's birth and created at least 5 years before the initial Medicaid	N/A	27	N/A	Yes	
4F	Statement signed by the birth physician or midwife who was in attendance at the time of birth showing a U.S. place of birth and created	N/A	28	N/A	Yes	
4G	Institutional admission papers from a nursing facility, skilled care facility or other institution showing a U.S. place of birth and created at least	N/A	29	N/A	Yes	

4H	Medical (clinic, doctor or hospital but not immunization) record showing a U.S. place of birth and created at least 5 years before the initial	N/A	30	N/A	Yes	
4I	Roll of Alaska Natives maintained by the Bureau of Indian Affairs	N/A	31	N/A	Yes	
7W	Written Affidavits - requires affidavits signed under penalty of perjury by at least two individuals (other than the applicant or recipient)	N/A	32	N/A	Yes	
8B	Exempt from Verification - Confirmed Current SSI Eligible	N/A	33	N/A	Yes	
8F	Exempt from Verification - Confirmed Medicare Entitlement	N/A	34	N/A	Yes	
8G	Exempt from Verification - Confirmed receiving Title II Disability Benefits	N/A	35	N/A	Yes	
8J	Exempt from Verification - Eligible under Foster Care or Adoption Assistance Program	N/A	36	N/A	Yes	
8K	Exempt from Verification - Eligible under CalWORKs Cash Assistance Program	N/A	37	N/A	Yes	
8P	Exempt from Verification - Eligible under Minor Consent Program	N/A	38	N/A	Yes	
8Q	Exempt from Verification - Eligible under Deemed Infant Provision	N/A	39	N/A	Yes	
8R	Exempt from Verification - Abandoned Baby Program eligible born in the U.S.	N/A	40	N/A	Yes	
8S	Exempt from Verification - Confirmed Former SSI Eligible (No Longer SSI Eligible)	N/A	41	N/A	Yes	
9A	Unable to obtain Citizenship documentation - Abandoned baby or child	N/A	42	N/A	Yes	
9B	Unable to obtain Citizenship documentation - Amnesia	N/A	43	N/A	Yes	
9C	Unable to obtain Citizenship documentation - Comatose client	N/A	44	N/A	Yes	
9D	Unable to obtain Citizenship documentation - Client otherwise incapacitated	N/A	45	N/A	Yes	
9J	Unable to obtain Citizenship documentation - County ended reasonable opportunity period due to client not making a good faith effort	N/A	46	N/A	Yes	
9P	Unable to obtain Citizenship documentation - Client says they cannot afford the cost to obtain an original document or written affidavit	N/A	47	N/A	Yes	
9Q	Unable to obtain Citizenship documentation - Client says they cannot locate an acceptable document and cannot get a written affidavit	N/A	48	N/A	Yes	
9S	SSN Verification removal also removed SSA Citizenship/Identity verification - alternate verification pending	N/A	49	N/A	Yes	
9Z	New applicant who has not yet provided required citizenship documentation	N/A	50	N/A	Yes	
9T	9T	N/A	51	N/A	Yes	
3E	U.S. Citizenship verified via CalHEERS Federal Data Services Hub (FDSH) Social Security Administration (SSA) Composite Service	N/A	52	N/A	Yes	
9U	9U	N/A	53	N/A	Yes	
9R	Unable to obtain Citizenship documentation - Client requested end of reasonable opportunity period and did not provide any explanation or acceptable	N/A	54	N/A	Yes	
3F	US Citizenship verified with CalHEERS through Verify Lawful Presence Service	N/A	55	N/A	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Message Center Subject

CI
 CI-823581 - DSD CT Message Center Subject IMPLEMENTED

Table: Code Table: MessageCenterSubject

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
subjClntr	Upcoming IHSS Interview	No	1	No	Yes	
subjCrmdr	Reminder to complete and return form	No	2	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Message Center Provider Forms

CI
 CI-823582 - DSD CT Message Center Provider Forms IMPLEMENTED

Table - Code Table: MessageCenterFormsProv

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SOC2305	SOC 2305 - Request For Exemption From Workweek Limits For Extraordinary Circumstances (Exemption 2)	No	1	No	Yes	
SOC2308	SOC 2308 - Exemption From Workweek Limits For Extraordinary Circumstances Approved Exemption Provider Agreement	No	2	No	Yes	
SOC2313	SOC 2313 - Exemption From Workweek Limits For Extraordinary Circumstances (Exemption 2) State Administrative Review Request Form	No	3	No	Yes	
SOC426	SOC 426 - Provider Enrollment Form	No	4	No	Yes	
SOC846	SOC 846 - Provider Enrollment Agreement	No	5	No	Yes	
SOC2255	SOC 2255 - Provider Workweek & Travel Time Agreement	No	6	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Code Table Definitions/Message Center Recipient Forms

CI
CI-823583 - DSD CT Message Center Recipient Forms IMPLEMENTED

Table - Code Table: MessageCenterFormsRecip

Code Value	Code Description	Default Value	Sort Order	Parent Code	Enabled	Notes
SOC295	SOC 295 - Application For In-Home Supportive Services	No	1	No	Yes	
SOC321	SOC 321 - Request For Order And Consent - Paramedical Services	No	2	No	Yes	
SOC332	SOC 332 - Recipient/Employer Responsibility Checklist	No	3	No	Yes	
SOC450	SOC 450 - Voluntary Services Certification	No	4	No	Yes	
SOC838	SOC 838 - Recipient Request For Assignment Of Authorized Hours To Providers	No	5	No	Yes	
SOC864	SOC 864 - Individualized Back-up Plan and Risk Assessment	No	6	No	Yes	
SOC873	SOC 873 - Health Care Certification Form	No	7	No	Yes	
CR6181	CR 6181 - Interpreter Services Statement and Confidentiality Agreement	No	8	No	Yes	
SOC821	SOC 821 - Assessment Of Need For Protective Supervision	No	9	No	Yes	
SOC825	SOC 825 - Protective Supervision 24-hours-a-day Coverage Plan	No	10	No	Yes	
SOC839	SOC 839 - Designation of Authorized Representative	No	11	No	Yes	
SOC839A	SOC 839A - Designation of Signatory for Timesheets and Other Provider-related Documents	No	12	No	Yes	
SOC839B	SOC 839B - Cancellation of Authorized Representative/TPRD Signatory	No	13	No	Yes	

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/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 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/User Page Access Log

Table - Table Name: USERPAGEACCESSLOG

Description: This table includes the logging details when the Alternative IDs and Medi-Cal Eligibility screen are accessed by the user.

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
USERPAGEACCESSLOGID	BIGINT	8	N	System generated	Primary key for Address.
USERNAME	CHARACTER	30	N	N/A	User accessing the screen.
USERROLE	CHARACTER	30	N	N/A	User's role type.
ACCESSEDPAGE	CHARACTER	100	N	N/A	Screen that is being accessed.
CONCERNROLEID	BIGINT	8	Y	N/A	N/A
CASEID	BIGINT	8	Y	System Generated	Foreign key for CaseHeader. Populated only for the Medi-Cal Eligibility screen and will show NULL for Alternative IDs screen.
PERSONTYPE	CHARACTER	10	N	N/A	PER001 is for Recipient. PER002 is for Provider. When the case is both Recipient and Provider, it is populated as PER002.
CREATEDBY	CHARACTER	30	Y	N/A	Created by user.
CREATEDON	TIMESTAMP		Y	N/A	Created on date.
LASTUPDATEDBY	CHARACTER	30	Y	N/A	Last updated by user.
LASTUPDATEDON	TIMESTAMP		Y	N/A	Last updated on date.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role

Table - Table Name: CONCERNROLE

Note: This table is OOTB functionality associated with Curam. Only customized fields for CMIPS are displayed for the DSD.

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
PREFEREDSECONDLANGUAGE	CHARACTER	10	Yes	Create Referral – Written language Create Application – Written language Person Home – Written language	The language that the person uses to write.
COUNTYCODE	CHARACTER	10	Yes	Create Referral – County Create Application – County Person Home – County	The county where the person is authorized for IHSS.
CREATEDBY	CHARACTER	30	No	N/A	User who created the row
CREATEDON	TIMESTAMP	N/A	No	N/A	Date the row was created on
LASTUPDATEDBY	CHARACTER	30	No	N/A	User who last updated the row
LASTUPDATEDON	TIMESTAMP	N/A	No	N/A	Date the row was last updated on
VERSIONNO	INTEGER	N/A	No	N/A	Internal version number
LASTWRITTEN	TIMESTAMP	N/A	No	N/A	Date the row was last updated on
OTHERWRITTENLANGUAGE	STRING	25	No	Person Home – Other Written Language Detail Modify Person – Other Written Language Detail Create Referral – Other Written Language Detail Create Application – Other Written Language Detail Create Provider – Other Written Language Detail	Recipient's Other Written Language
OTHERSPOKENLANGUAGE	STRING	25	No	Person Home – Other Spoken Language Detail Modify Person – Other Spoken Language Detail Create Referral – Other Spoken Language Detail Create Application – Other Spoken Language Detail Create Provider – Other Spoken Language Detail	Recipients Other Spoken Language

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Snapshot

Table - Table Name: CONCERNROLESAPSHOT

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
preferedSecondLanguage	CHARACTER	10	Yes	Person History - Written language	The language that the person uses to write.
countyCode	CHARACTER	10	Yes	Person History - County	The county where the person is authorized IHSS.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Person

Table - Table Name: Person

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
concernroleid	BIGINT	8	No	N/A	Primary Key of the table.
personBirthName	CHARACTER	65	Yes	N/A	Person Birth Name
dateOfBirth	DATE	4	Yes	Create Application , Referral and Modify Person	Date of Birth
dateofDeath	DATE	4	Yes	Modify Person – Date of Death	An identification date to record the date, month and year of death.
gender	CHARACTER	10	Yes	Create Application , Referral and Modify Person	Gender
specialInterestCode	CHARACTER	10	Yes	N/A	Special Interest code
maritalStatusCode	CHARACTER	10	Yes	N/A	Martial Status code
nationalityCode	CHARACTER	10	Yes	N/A	Nationality Code
residencyabroadInd	CHARACTER	1	No	N/A	Residence Abroad Indicator
motherBirthSurName	CHARACTER	65	Yes	N/A	Mothers Brith Sur Name
comments	CHARACTER	200	Yes	N/A	Comments
type	CHARACTER	10	Yes	N/A	Type
dateofBirthverInd	CHARACTER	1	No	N/A	Date of birth Indicator
dateofDeathverInd	CHARACTER	1	No	N/A	Date of Death
primaryAlternateID	CHARACTER	18	Yes	N/A	Primary Alternated id
countryofBirth	CHARACTER	10	Yes	N/A	County of Birth
placeofBirth	CHARACTER	30	Yes	N/A	Place of Birth
pinnumber	CHARACTER	4	Yes	N/A	Pin Number
primaryAlternatenameID	BIGINT	8	No	N/A	Foreign Key to Alternate name table
ethnicOriginCode	CHARACTER	10	Yes	Create Application , Referral and Modify Person	Ethnicity Origin Code
paymentFrequency	CHARACTER	9	Yes	N/A	Payment Frequency
nextPaymentDate	DATE	4	Yes	N/A	Next Payment date
currencyType	CHARACTER	10	Yes	N/A	Currency Type
methodofPmtCode	CHARACTER	10	Yes	N/A	Method of Payment Code
upperPersonBirthName	CHARACTER	65	Yes	N/A	Person birth name in upper characters
upperMotherBirthsurName	CHARACTER	65	Yes	N/A	Mother Birth surname in upper characters
race	CHARACTER	200	Yes	N/A	Race
indigenousGroupCode	CHARACTER	250	Yes	N/A	Indigenous group code
indigenousPersonInd	CHARACTER	1	Yes	N/A	Indigenous person indicator
referralSrcCode	CHARACTER	10	Yes	Create Referral – Referral Source Create Application – Referral Source Person Home – Referral Source	The source of the referral.
blankSSNReasonCd	CHARACTER	10	Yes	Create Referral – Blank SSN Reason Create Application – Blank SSN Reason Person Home – Blank SSN Reason	Indicates that the person has Blank SSN reason.
meetsResidencyReqCode	CHARACTER	10	Yes	Create Referral – Meets Residency Requirements Create Application – Meets Residency Requirements Person Home – Meets Residency Requirements	Indicates that the person meets the residency requirements.
nameEffectiveDate	DATE	4	Yes	Person – Effective Date	The date that the most recent name is effective from.
appliedForSSNDate	DATE	4	Yes	N/A	Date of SSN application
deathNotificationSourceCode	CHARACTER	10	Yes	Modify Person – Death Notification Source	Death Notification Source
deathNotifyOutcomeCode	CHARACTER	10	Yes	Modify Person – Death Outcome	Death Outcome

reportedDateofDeath	DATE	10	Yes	Modify Person – Reported Date of Death	Reported Date Of Death
fingerprintExemptionCode	CHARACTER	10	Yes	N/A	Finger Print exemption code
dateFingerPrinted	CHARACTER	4	Yes	N/A	Date of finger print taken
referralDate	DATE	4	Yes	Create Case – IHSS Referral Date Case Home – IHSS Referral Date	Date that the case was referred.
createdBy	CHARACTER	30	Yes	N/A	Audit Field - The record creation time stamp.
createdOn	DATE TIME	8	Yes	N/A	Audit Field - The record created by.
lastupdatedBy	CHARACTER	30	Yes	N/A	Audit Field - The record modified time stamp.
lastupdatedOn	DATE TIME	8	Yes	N/A	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	Yes	N/A	System Generated – How many times the record modified.
lastWritten	DATE TIME	8	Yes	N/A	Audit Field - The record modified time stamp
pseudoMedical	CHARACTER	1	No	Create Referral - Medi-Cal Pseudo Create Application - Medi-Cal Pseudo Person Home - Medi-Cal Pseudo Modify Person - Medi-Cal Pseudo	Used for CIN search.
isihssConsumerPortalUserlnd	CHARACTER	1	No	N/A	Indicates whether the person is an IHSS Consumer Portal User Default is '0'
ihssConsumerPortalUserRe gisterDate	DATE	4	Yes	N/A	Ihss Consumer Portal Registration Date
genderIdentity	CHARACTER	10	Yes	Create Referral – Gender Identity Create Application - Gender Identity Person Home - Gender Identity Modify Person - Gender Identity	Gender Identity of the person
specifyOtherGI	CHARACTER	25	Yes	Create Referral – Specify Other GI Create Application - Specify Other GI Person Home - Specify Other GI Modify Person - Specify Other GI	Specify Other Gender Identity of the person
sexualOrientation	CHARACTER	10	Yes	Create Referral – Sexual Orientation Create Application - Sexual Orientation Person Home - Sexual Orientation Modify Person - Sexual Orientation	Sexual Orientation of the person
specifyOtherSO	CHARACTER	25	Yes	Create Referral – Specify Other SO Create Application - Specify Other SO Person Home - Specify Other SO Modify Person - Specify Other SO	Specify Other Sexual Orientation of the person

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Person Snapshot

Table - Table Name: PersonSnapshot

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
personSnapshotID	BIGINT	8	No	N/A	Primary Key of the table.
concernroleid	BIGINT	8	No	N/A	Foreign Key to the person table.
personBirthName	CHARACTER	65	Yes	N/A	Person Birth Name
dateOfBirth	DATE	4	Yes	Create Application , Referral and Modify Person	Date of Birth
dateofDeath	DATE	4	Yes	Modify Person – Date of Death	An identification date to record the date, month and year of death.
gender	CHARACTER	10	Yes	Create Application , Referral and Modify Person	Gender
specialInterestCode	CHARACTER	10	Yes	N/A	Special Interest code
maritalStatusCode	CHARACTER	10	Yes	N/A	Martial Status code
nationalityCode	CHARACTER	10	Yes	N/A	Nationality Code
residencyabroadInd	CHARACTER	1	No	N/A	Residence Abroad Indicator
motherBirthSurName	CHARACTER	65	Yes	N/A	Mothers Brith Sur Name
comments	CHARACTER	200	Yes	N/A	Comments
type	CHARACTER	10	Yes	N/A	Type
dateofBirthverInd	CHARACTER	1	No	N/A	Date of birth Indicator
dateofDeathverInd	CHARACTER	1	No	N/A	Date of Death
primaryAlternateID	CHARACTER	18	Yes	N/A	Primary Alternated id
countryofBirth	CHARACTER	10	Yes	N/A	County of Birth
placeofBirth	CHARACTER	30	Yes	N/A	Place of Birth
pinnumber	CHARACTER	4	Yes	N/A	Pin Number
primaryAlternatenameID	BIGINT	8	No	N/A	Foreign Key to Alternate name table
ethnicOriginCode	CHARACTER	10	Yes	Create Application , Referral and Modify Person	Ethnicity Origin Code
paymentFrequency	CHARACTER	9	Yes	N/A	Payment Frequency
nextPaymentDate	DATE	4	Yes	N/A	Next Payment date
currencyType	CHARACTER	10	Yes	N/A	Currency Type
methodofPmtCode	CHARACTER	10	Yes	N/A	Method of Payment Code
upperPersonBirthName	CHARACTER	65	Yes	N/A	Person birth name in upper characters
upperMotherBirthsurName	CHARACTER	65	Yes	N/A	Mother Birth surname in upper characters
race	CHARACTER	200	Yes	N/A	Race
indigenousGroupCode	CHARACTER	250	Yes	N/A	Indigenous group code
indigenousPersonInd	CHARACTER	1	Yes	N/A	Indigenous person indicator
referralSrcCode	CHARACTER	10	Yes	Create Referral – Referral Source Create Application – Referral Source Person Home – Referral Source	The source of the referral.
blankSSNReasonCd	CHARACTER	10	Yes	Create Referral – Blank SSN Reason Create Application – Blank SSN Reason Person Home – Blank SSN Reason	Indicates that the person has Blank SSN reason.
meetsResidencyReqCode	CHARACTER	10	Yes	Create Referral – Meets Residency Requirements Create Application – Meets Residency Requirements Person Home – Meets Residency Requirements	Indicates that the person meets the residency requirements.
nameEffectiveDate	DATE	4	Yes	Person – Effective Date	The date that the most recent name is effective from.
appliedForSSNDate	DATE	4	Yes		
deathNotificationSourceCode	CHARACTER	10	Yes	Modify Person – Death Notification Source	Death Notification Source

deathNotifyOutcomeCode	CHARACTER	10	Yes	Modify Person – Death Outcome	Death Outcome
reportedDateofDeath	DATE	10	Yes	Modify Person – Reported Date of Death	Reported Date Of Death
fingerprintExemptionCode	CHARACTER	10	Yes	N/A	Finger Print exemption code
dateFingerPrinted	CHARACTER	4	Yes	N/A	Date of finger print taken
referralDate	DATE	4	Yes	Create Case – IHSS Referral Date Case Home – IHSS Referral Date	Date that the case was referred.
createdBy	CHARACTER	30	Yes	N/A	Audit Field - The record creation time stamp.
createdOn	DATE TIME	8	Yes	N/A	Audit Field - The record created by.
lastupdatedBy	CHARACTER	30	Yes	N/A	Audit Field - The record modified time stamp.
lastupdatedOn	DATE TIME	8	Yes	N/A	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	Yes	N/A	System Generated – How many times the record modified.
lastWritten	DATE TIME	8	Yes	N/A	Audit Field - The record modified time stamp
pseudoMedical	CHARACTER	1	No	Create Referral - Medi-Cal Pseudo Create Application - Medi-Cal Pseudo Person Home - Medi-Cal Pseudo Modify Person - Medi-Cal Pseudo	Used for CIN search.
isihssConsumerPortalUserInd	CHARACTER	1	No	N/A	Indicates whether the person is an IHSS Consumer Portal User Default is '0'
ihssConsumerPortalUserRegisterDate	DATE	4	Yes	N/A	Ihss Consumer Portal Registration Date
genderIdentity	CHARACTER	10	Yes	Create Referral – Gender Identity Create Application - Gender Identity Person Home - Gender Identity Modify Person - Gender Identity	Gender Identity of the person
specifyOtherGI	CHARACTER	25	Yes	Create Referral – Specify Other GI Create Application - Specify Other GI Person Home - Specify Other GI Modify Person - Specify Other GI	Specify Other Gender Identity of the person
sexualOrientation	CHARACTER	10	Yes	Create Referral – Sexual Orientation Create Application - Sexual Orientation Person Home - Sexual Orientation Modify Person - Sexual Orientation	Sexual Orientation of the person
specifyOtherSO	CHARACTER	25	Yes	Create Referral – Specify Other SO Create Application - Specify Other SO Person Home - Specify Other SO Modify Person - Specify Other SO	Specify Other Sexual Orientation of the person

Table— Table Name: IHSSCase

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
caseID	BIGINT	8	No	System generated	Primary key for IHSSCase and foreign key to CaseHeader.
sentToSawsInd	CHARACTER	1	No	System populated	Has this case been sent to SAWS?
createdBy	CHARACTER	30	Yes	System assigned from Users table.	Foreign key to Users.
countyCode	CHARACTER	10	Yes	Case Home - County	The county code for the owner of this case.
mailDesigneeID	BIGINT	8	No	Case Home – mail Designee	A foreign key to the ConcernRole table for the ConcernRole who is to receive the mail.
interpreterAvailableInd	CHARACTER	1	No	Create Case – Interpreter Available Case Home – Interpreter Available	Indicates that an interpreter is available for the case.
registeredPayrollDate	DATE	4	Yes	System populated	Date that the Recipient was successfully registered with the Payroll system.
applicationDate	DATE	4	Yes	Create Case – IHSS Application Date Case Home – IHSS Application Date	Date that IHSS services were applied for.
mediCalReferralDate	DATE	4	Yes	Case Home – Medi-Cal Eligibility Referral Date	Date that the referral was sent to Medi-Cal.
mediCalEligNotifyDate	DATE	4	Yes	Case Home – Medi-Cal Initial Eligibility Notification Date	Date on which the Initial Medi-Cal Eligibility record is received from MEDS.
caseStatusDate	Date	4	Yes	Case Home – Case Status Date	Date on which the latest case status has been effective.

NeedSCIClearenceInd	CHARACTER	1	No	System generated	Indicates that SCI clearance task needs to be triggered.
demographicsUpdate d Date	DATE	4	Yes	System populated	Date that Person Demographics was changed.
activeProviders	SMALLINT	10	No	Case Home – Number of active Providers	No. Of Providers active on a particular Case.
spcComments1	CHARACTER	20	Yes	View Case Home – County Use 1	Free form text can be used by a county for special project coding
spcComments2	CHARACTER	20	Yes	View Case Home – County Use 2	Free form text can be used by a county for special project coding
spcComments3	CHARACTER	20	Yes	View Case Home – County Use 3	Free form text can be used by a county for special project coding
spcComments4	CHARACTER	20	Yes	View Case Home – County Use 4	Free form text can be used by a county for special project coding

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/User Zip Code

Table - Table Name: UserZipCode

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
userZipCodeID	BIGINT	8	No	System generated	Primary key for UserZipCode
userName	CHARACTER	30	No	System assigned from Users table	Foreign key to users
zipCode	INTEGER	5	No	User Search – Zip Code	The ZIP code of the case owner

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Users

Table – Table Name: Users

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
firstAltLanguage	CHARACTER	10	Yes	User Search – Language1	The user's first language besides English.
secondAltLanguage	CHARACTER	10	Yes	User Search – Language2	The user's second language besides English.
workerNumber	CHARACTER	4	Yes	User Search – Worker Number	The legacy worker number that identifies the Case Owner within the county.
caseCount	INTEGER	6	No	User Search – Case Count	The number of cases assigned to the user (updated daily).

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Person Referral

Table - Table Name: PersonReferral

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
personReferralID	BIGINT	8	No	System generated.	The primary key for the PersonReferral table.
countyCode	CHARACTER	10	Yes	Create Referral – County Create Application – County	The county where the person is authorized for IHSS.
referralDate	DATE	4	Yes	Create Case – IHSS Referral Date Case Home – IHSS Referral Date	The date that the referral was entered into the system.
referralSourceCode	CHARACTER	10	Yes	Create Referral – Referral Source Create Application – Referral Source Person Home – Referral Source	The source of the referral.
concernRoleID	BIGINT	4	No	System assigned from ConcernRole table	The foreign key to the ConcernRole whom the referral is for.
referralClosedDate	DATE	4	Yes	N/A	This is used for storing the closed referral date.
caseCreatedDate	DATE	4	Yes	N/A	This date is populated when the case is created
recordStatus	CHARACTER	10	Yes	N/A	This field captures the status of the record (Active or Inactive).

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Alternate ID

Table - Table Name: Concernrolealternateid

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
concernRoleID	BIGINT	8	no	System generated	Primary key of concernrole table.
alternateID	CHARACTER	18	yes	Create Alternate ID – Alternate ID Modify Alternate ID – Alternate ID Person Home – SSN Modify Person – SSN	The value of Alternate ID such as SSN, Provider ID based on type code.
typeCode	CHARACTER	10	yes	Create Alternate ID – Type Modify Alternate ID – Type Alternate IDs – Type	The Type of Alternate ID.
startDate	DATE	4	yes	Create Alternate ID – From Modify Alternate ID – From Alternate IDs – From	The date that alternate ID is effective from.
endDate	DATE	4	yes	N/A	The date that alternate ID is effective to.
statusCode	CHARACTER	10	yes	Alternate IDs – Status	The status of alternate ID.
concernRoleAlternateID	BIGINT	8	no	System generated	Primary key of concernRoleAlternateID table.
comments	CHARACTER	200	yes	Create Alternate ID – Comments Modify Alternate ID – Comments	Comments
duplicatesCd	CHARACTER	10	yes	Create Alternate ID – Duplicates Modify Alternate ID – Duplicates Person Home – Duplicates	Indicates that the person has Duplicate or Suspect SSN.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Email Address

Table - TableName: Concern Role Email Address

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
concernRoleEmailAddressID	BIGINT	8	No	System Generated	Primary key for ConcernRoleEmailAddress
concernRoleID	BIGINT	8	No	System Generated	Foreign key to ConcernRole
emailAddressID	BIGINT	8	No	System Generated	Foreign Key to EmailAddress table
typeCode	CHARACTER	10	No	N/A	Email address type code, Business – ET1, Personal – ET2. Only Personal Email address will be stored as part of CR919.
startDate	DATE	4	No	Email Address screens	Email Address begin date
endDate	DATE	4	Yes	N/A	Email Address end date
versionNo	INTEGER	4	No	N/A	System Generated – How many times the record modified.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Email Address

Table - TableName: Email Address

Field Name	Field Type	Size	Null	Screen Name – Field Name	Comments
emailAddressID	BIGINT	8	No	System Generated	Primary key for EmailAddress
emailAddress	CHARACTER	50	Yes	Email Address screens	Email ID of a person
statusCode	CHARACTER	10	Yes	N/A	Record Status, Active - RST1, Inactive – RST2
comments	VARCHAR	200	Yes	N/A	Email comments. The column will not be populated through CR919.
createdOn	DATETIME	8	Yes	NA	Audit Field - The record creation time stamp.
createdBy	CHARACTER	30	Yes	NA	Audit Field - The record created by.
lastUpdatedOn	DATETIME	8	Yes	NA	Audit Field - The record modified time stamp.
lastUpdatedBy	CHARACTER	30	Yes	NA	Audit Field - The record modified time stamp.
versionNo	INTEGER	4	No	NA	System Generated – How many times the record modified.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Contact Phone Number

Table – Table Name: ContactPhoneNumber

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
CONTACTPHONENUMBERID	BIGINT	N/A	No	N/A	Primary key
CONTACTID	BIGINT	N/A	No	N/A	Foreign key
PHONENUMBERID	BIGINT	N/A	No	N/A	Phone number
TYPECODE	CHARACTER	10	Yes	N/A	Phone number type
STARTDATE	DATE	N/A	Yes	N/A	Start date of the phone record
ENDDATE	DATE	N/A	Yes	N/A	End date of the phone record
VERSIONNO	INTEGER	N/A	No	N/A	Version number
CREATEDON	TIMESTAMP	N/A	Yes	N/A	CURRENT TIMESTAMP
LASTUPDATEDBY	CHARACTER	30	Yes	N/A	Date last updated
CREATEDBY	CHARACTER	30	Yes	N/A	User who created the record
LASTUPDATEDON	TIMESTAMP	N/A	Yes	N/A	CURRENT TIMESTAMP

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Address

Table - Table Name: Address

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
ADDRESSID	BIGINT	8	N	System generated	Primary key for Address
COUNTRYCODE	CHARACTER	10	Y	N/A	Country code
MODIFIABLEIND	CHARACTER	1	N	N/A	Indicator whether the address is modifiable
ADDRESSDATA	VARCHAR	2048	Y	View Address - Address	The address
ADDRESSLAYOUTTYPE	CHARACTER	10	Y	View Address - Type	Address layout type
GEOCODE	VARCHAR	2048	Y	N/A	Geocode info
LATITUDE	DOUBLE	8	Y	N/A	Latitude of address
LONGITUDE	DOUBLE	8	Y	N/A	Longitude of address
CREATEDBY	CHARACTER	30	Y	N/A	Created by user
CREATEDON	TIMESTAMP	10	Y	N/A	Created on date
LASTUPDATEDBY	CHARACTER	30	Y	N/A	Last updated by user
LASTUPDATEDON	TIMESTAMP	10	Y	N/A	Last updated on date
VERSIONNO	INTEGER	4	N	N/A	Version number
LASTWRITTEN	TIMESTAMP	10	Y	N/A	Last written to timestamp
GEOCODESCORE	DOUBLE	8	Y	N/A	Geocode score
GEOCODEADDRESSTYPE	CHARACTER	50	Y	N/A	Geocode address type
GEOCODETIMESTAMP	TIMESTAMP	10	Y	N/A	Geocode timestamp
GEOCODESTATUS	CHARACTER	10	Y	N/A	Geocode status
GEOCODEMATCHADDRESS	VARCHAR	2048	Y	N/A	Geocode match address

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Concern Role Address

Table - Table Name: CONCERNROLEADDRESS

Note: This table is OOTB functionality associated with Curam. Only customized fields for CMIPS are displayed for the DSD.

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
CASSMatch	CHARACTER	1	N	N/A	Indicator of address verification match
CASSUpdates	CHARACTER	1	N	N/A	Indicator of address verification updates
CASSFailed	CHARACTER	1	N	N/A	Indicator of address verification failure
CREATEDBY	CHARACTER	30	Y	N/A	User who created the row
CREATEDON	TIMESTAMP	N/A	Y	N/A	Date the row was created on
LASTUPDATEDBY	CHARACTER	30	Y	N/A	User who last updated the row
LASTUPDATEDON	TIMESTAMP	N/A	Y	N/A	Date the row was last updated on
VERSIONNO	INTEGER	N/A	N	N/A	Internal version number
LASTWRITTEN	TIMESTAMP	N/A	Y	N/A	Date the row was last updated on

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Phone Number

Table – Table Name: PhoneNumber

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
PHONENUMBERID	BIGINT	N/A	No	N/A	Generated when row created on the table
PHONECOUNTRYCODE	CHARACTER	5	No	N/A	Country code assigned to a phone number record that is specific to new or update phone numbers.
PHONEAREACODE	CHARACTER	8	No	N/A	Area code assigned to a phone number record that is specific to new or update phone numbers.
PHONENUMBER	CHARACTER	20	No	N/A	Phone number assigned to a phone number record that is specific to new or update phone numbers.
PHONEEXTENSION	CHARACTER	15	Yes	N/A	Extension assigned to a phone number record that is specific to new or update phone numbers.
STATUSCODE	CHARACTER	10	No	N/A	Indicates the status of the phone record.
COMMENTS	VARCHAR	200	Yes	N/A	Comments assigned to a phone number record that is specific to phone number.
ISSTOPPED	CHARACTER	1	No	N/A	isStopped assigned to a phone number record that is specific to stop the text notification
ISPHONENUMBERVERIFIED	CHARACTER	1	No	N/A	ISPHONENUMBERVERIFIED assigned to a phone number record that is specific to phone number verification.
STOPREQUESTEDON	TIMESTAMP	N/A	No	N/A	STOPREQUESTEDON assigned to a phone number record that is specific to stop the text notification.
PHONE	CHARACTER	10	No	N/A	Phone column to capture the combined area code and seven-digit phone number.
CREATEDBY	CHARACTER	30	Yes	N/A	Audit Field - The record created by.
CREATEDON	TIMESTAMP	N/A	Yes	N/A	Audit Field - The record creation time stamp.
LASTUPDATEDBY	CHARACTER	30	Yes	N/A	Audit Field - The user id who last updated the record.
LASTUPDATEDON	TIMESTAMP	N/A	Yes	N/A	Audit Field - The date timestamp the record was last modified
VERSIONNO	INTEGER	N/A	No	N/A	System Generated – How many times the record modified.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Database Entities/Address Trigger Data

Table - Table Name: AddressTriggerData

Field Name	Field Data Type	Size	Null	Screen Name – Field Name	Comments
ADDRESSTRIGGERDATAID	BIGINT	8	N	System generated	Primary key for Address Trigger Data
CONCERNROLEID	BIGINT	8	Y	N/A	N/A
CONCERNROLEADDRESSID	BIGINT	8	Y	N/A	N/A
CONTACTID	BIGINT	8	Y	N/A	N/A
MAILDESIGNEECASEID	BIGINT	8	Y	N/A	N/A
ADDRESSID	BIGINT	8	Y	N/A	N/A
STARTDATE	DATE	4	Y	N/A	State date
ENDDATE	DATE	4	Y	N/A	End date
PROCESSSTATUS	CHARACTER	10	Y	N/A	Process Status
GEOCODESCORE	DOUBLE	10	N	N/A	Geocode score
GEOCODESTATUS	CHARACTER	10	Y	N/A	Geocode status
GEOCODETIMESTAMP	TIMESTAMP	10	Y	N/A	Geocode timestamp
GEOCODEADDRESSTYPE	CHARACTER	50	Y	N/A	Geocode address type
GEOCODEMATCHADDRESS	VARCHAR	2048	Y	N/A	Geocode match address
LATITUDE	DOUBLE	10	Y	N/A	Latitude of address
LONGITUDE	DOUBLE	10	Y	N/A	Longitude of address
LASTWRITTEN	TIMESTAMP	10	Y	N/A	Last written to timestamp

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions

This section will document the high-level business classes that will be developed to support the CMIPS business processes. Examples of these are the IHSS SOC calculation or the class definitions for the SAVE business process.

Another definition of a business class is the core application classes that will be developed for the CMIPS Application. The definition of a business class is based on the Unified Modeling Language (UML) definition. This section of the DSD will contain both UML class diagrams and UML object interaction diagrams.

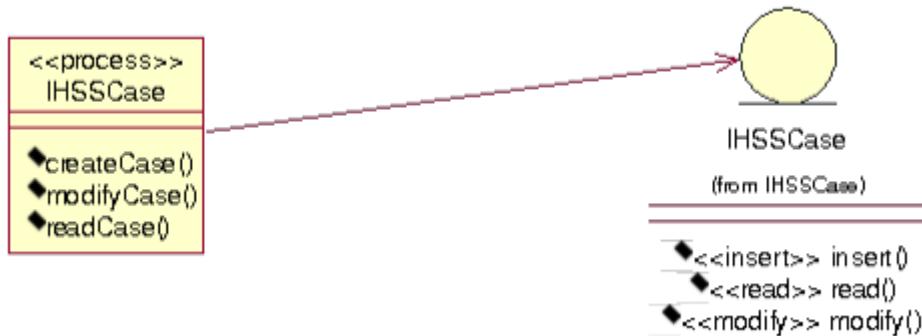
At a high-level, each business class definition will include:

- 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

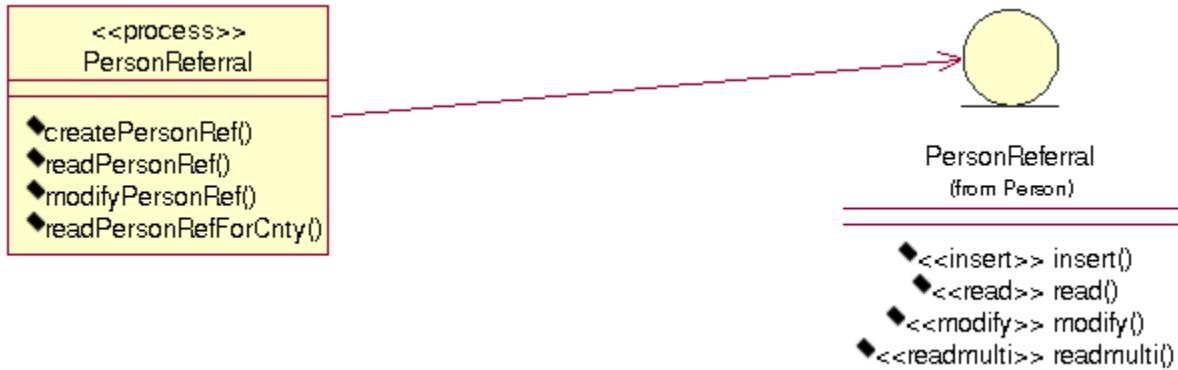
DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions/IHSSCase



Operations

Class	Operation	Description	Exceptions
IHSSCase	createCase()	Will create a record in IHSSCase table for the new case.	
IHSSCase	readCase()	Will query the IHSSCase table to retrieve the case record.	
IHSSCase	modifyCase()	Will update the record in IHSSCase table for the modified case.	

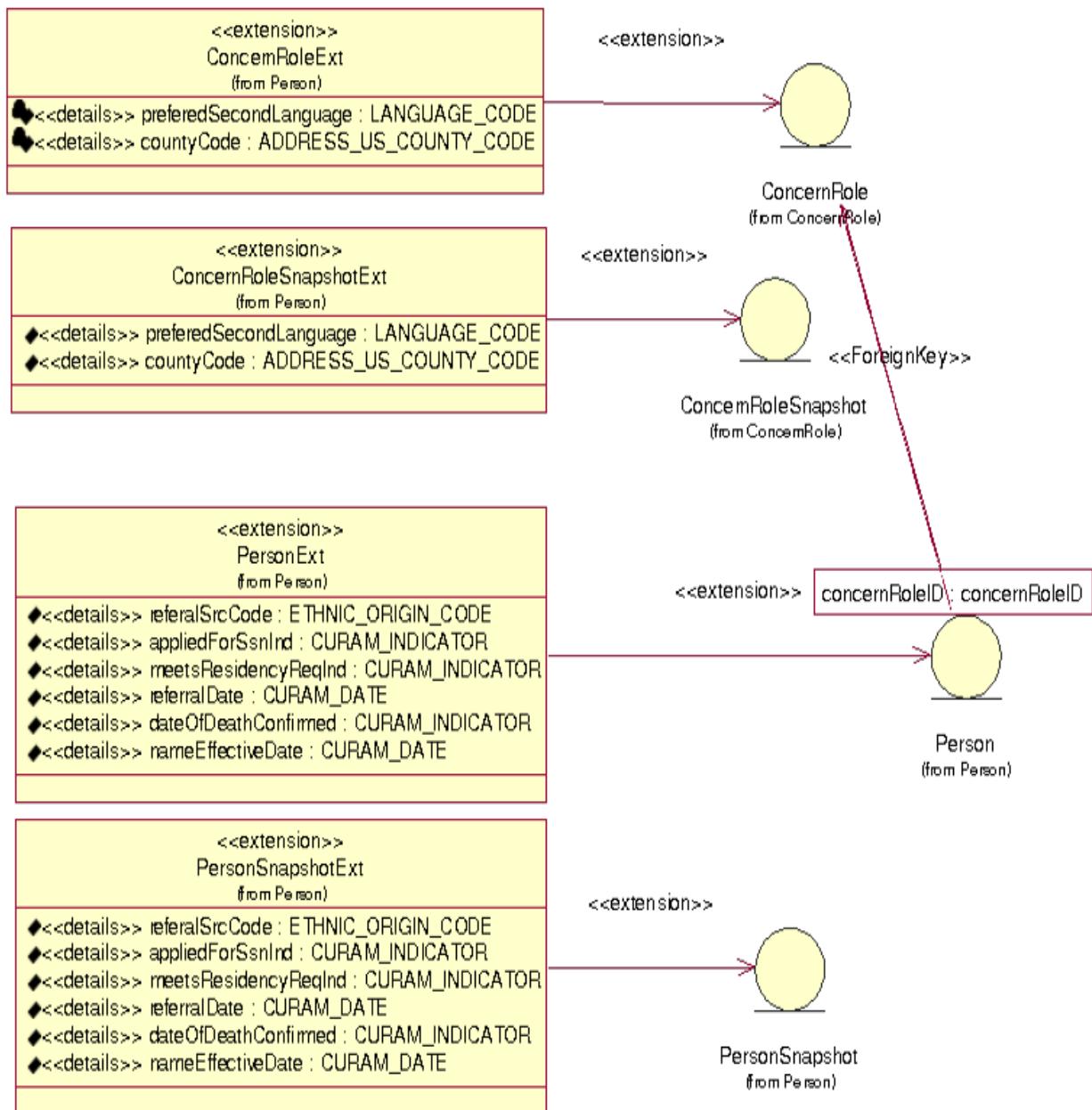
DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions /PersonReferral



Operations

Class	Operation	Description	Exceptions
PersonReferral	createPersonRef()	Will create a record in PersonReferral table for the new referral.	
PersonReferral	readPersonRef ()	Will query the PersonReferral table to retrieve the referral record.	
PersonReferral	modifyPersonRef ()	Will update the record in PersonReferral table for the modified referral.	
PersonReferral	readPersonRefForCnty ()	Will query the PersonReferral table to retrieve referral records for a county.	

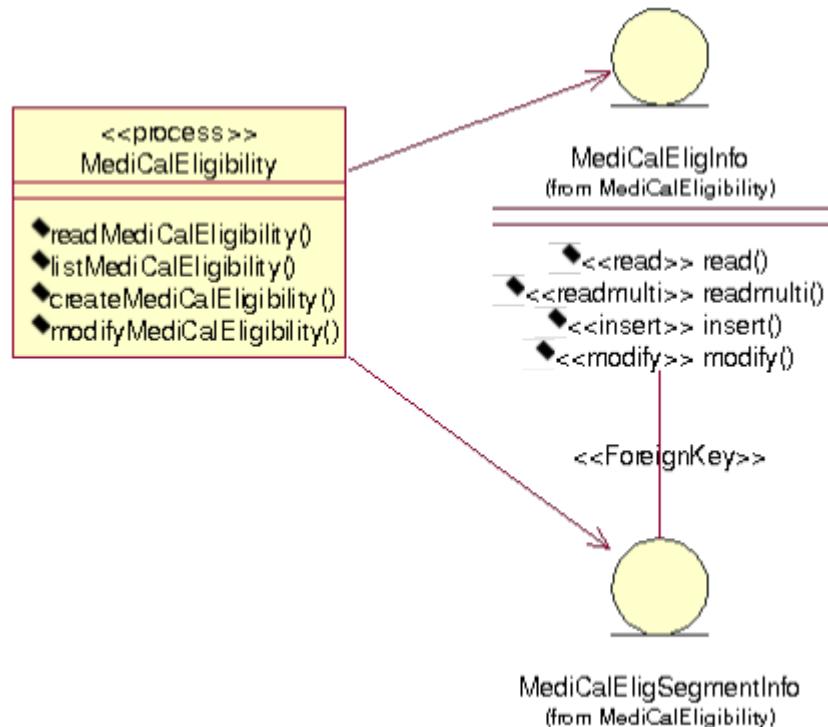
DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions /ConcernRole, ConcernRoleSnapshot, Person, PersonSnapshot (Extensions)



Operations

There are no Operations associated with these extensions.

DSD 20/Recip CM & OS – Online Search, Initial Contact, Intake Application/Business Class Definitions /MediCalEligInfo



Operations

Class	Operation	Description	Exceptions
MediCalEligInfo	createMediCalEligInfo()	Will create a record in MediCalEligInfo table for the new referral.	
MediCalEligInfo	readMediCalEligInfo()	Will query the MediCalEligInfo table to retrieve the MediCalEligInfo record.	
MediCalEligInfo	modifyMediCalEligInfo()	Will update the record in MediCalEligInfo table for modified eligibility information.	
MediCalEligInfo	listMediCalEligInfo()	Will list all the records in MediCalEligInfo table for the selected case.	