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DSD - Section 30



CMIPS

D-4.2-03 – IHSS CMIPS Detailed System Design (DSD) (R2025.03.01) Section 30

Version 1.0

03/28/2025

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DSD 30/Tasks and Notifications

This section of the DSD will identify all Tasks and Notifications associated with the CMIPS Application. Tasks and Notifications lists will be associated with a specific DSD section. Additionally, the numbering (No) associated with the original DSD sections will be retained to allow the association to previous Test Case and Requirement traceability.

Section Notes

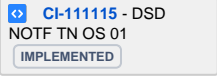

T/N: T = Task, N = Notification.

- Notifications may be closed without an action. Notifications are user specific and cannot be sent to a work queue.
- Tasks will auto close when the indicated Action occurs or may be manually closed by the user with a comment.

Deadline / Escalation: Task Escalation – Standard = 5 business days; If no action is taken, standard escalation is to a supervisor. There is no standard escalation beyond the supervisor role. If outside the Standard number of days or hours, the specific escalation will be indicated; Notifications will be indicated as N/A.



DSD 30/Tasks and Notifications/Online Search

The following is a list of Tasks and Notifications associated with DSD Section 20 – Online Search, Initial Contact, Intake Application:

No	T/N	Req ID	CI	Task/Notification Name	Trigger Condition/Screen Action	Task /Notification Recipient	Action Link To	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
1	N	11988		[case name] [case number] Case Assigned	When a case has been manually assigned to a Case Owner, notify the Case Owner	Case Owner	Case Home	N/A	N/A	N/A	N/A
2	T	12033		[case name][case number] Recipient address changed to Out of State.	When a user other than the Case Owner assigned to the Recipient case keys a change to the Recipient residence address indicating a State other than California (CA), CMIPS shall produce a Task to the Case Owner.	Case Owner	Case Home	Case Termination Close task with comment	Standard	High	N/A

DSD 30/Tasks and Notifications/Service Eligibility

The following Tasks and Notifications are associated with DSD Section 21 – Service Eligibility:

No	T/N	Req ID	CI	Task /Notification Name	Trigger Condition/Screen Action	Task/Notification Recipient	Action Link To	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
1	N	21164	 CI-822481 - DSD NOTF TN SE 01 	Case [case number]. Recipient requested CFCO Opt-Out.	Upon a submission of a change assessment with the Recipient Declines CFCO indicator marked as true, CMIPS shall produce a Notification to the Case Supervisor of the Case Worker who submitted the assessment.	Case Supervisor of the Case Worker who submitted the assessment.	Case Home page	N/A	N/A	N/A	N/A

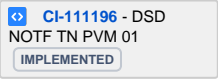
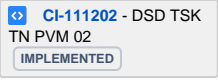
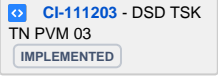
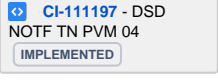
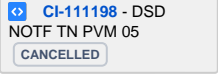
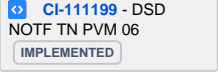
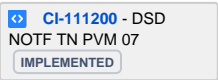
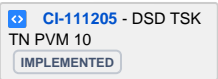
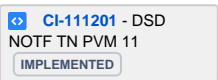
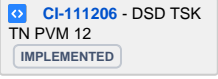
DSD 30/Tasks and Notifications/Final Determination

The following Tasks and Notifications are associated with DSD Section 22 – Final Determination:

No	T/N	Req ID	CI	Task/Notification Name	Trigger Condition/Screen Action	Task /Notification Recipient	Action Link To	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
1	T	12080	CI-111159 - DSD TSK TN FD 01 IMPLEMENTED	[case number] Case Ready for Review	When a county worker requiring supervisory review selected the Submit for Approval action.	Case Owner Supervisor	Evidence Worker package	Social Worker Supervisor must either Approve or Reject the case. This task will automatically close when pending evidence is deleted. Note: For ICT evidence, the Case Owner Supervisor can delegate the task to another supervisor in the receiving county for approval or rejection.	Standard	Medium	N/A
2	N	12083 16971	CI-111156 - DSD NOTF TN FD 02 IMPLEMENTED	[case number] Share of Cost Exceeds Need	When, calculated, the IHSS Share of Cost exceeds the Share of Cost Compare Cost for case with IPO, CFCO or PCSP Funding Source	Case Owner	Case Home	N/A	N/A	N/A	N/A
3	N	12081	CI-111157 - DSD NOTF TN FD 03 IMPLEMENTED	[case Number] Case Review Approval	When a case submitted for Approval is approved the by Supervisor.	Case Owner	Case Home	N/A	N/A	N/A	N/A
4	T	12081	CI-111160 - DSD TSK TN FD 04 IMPLEMENTED	[case number] Case Review Rejection [rejection reason text & rejection comment text]	When the case submitted for Approval is rejected the by Supervisor	Case Owner	Case Home	Make indicated correction and "Submit for Approval"	Standard	High	N/A
6	T	16600	CI-111161 - DSD TSK TN FD 06 IMPLEMENTED	[case number] Authorized Hours Less than Hours Paid	When the Current Case Status is Leave and the Paid Hours for a Service Month included in a previous Authorization Period exceed the Authorized hours for that Service Month	Case Owner	Case Home	Set up Overpayment Recovery for the difference in hours Close task with comment	Standard	Medium	N/A
7	T	12162	CI-111162 - DSD TSK TN FD 07 IMPLEMENTED	[case number] Request for Homemaker/PA Contract Services	When Homemaker/PA Contract Hours are assigned to a Recipient case, send task to Homemaker/PA Contract Supervisor queue.	Homemaker/PA Contract Supervisor	Case Home	Close task with comment	Standard	Low	N/A
8	T	16180	CI-111163 - DSD TSK TN FD 08 IMPLEMENTED	[case number] Change in Recipient Auth Hours; Verify Modes of Service	When the Pending Evidence is Approved and Activated and the previous Authorization Period has hours assigned to multiple Mode of Service and the current Auth to Purchase hours do not equal the previous Auth to Purchase Hours	Case Owner	Modes of Service	Update Assign Modes of Service Hours Close task with comment	Standard	High	N/A
9	T	16178	CI-111164 - DSD TSK TN FD 09 IMPLEMENTED	[case number] Assigned IP Hours are not equal to IP Mode of Service Hours. Provider Assigned Hours Form Update Required	When the Pending Evidence is Approved and Activated and the case has Individual Provider(s) with "Assigned Hours" and aggregated total of the assigned hours for that Provider(s) does not equal to or greater than the IP Mode of Service Hours	Case Owner	Case Home	Update Assigned Hours for IP with Assigned Hours Close task with comment	Standard	High	Friday - Assigned IP Hours are not equal to IP Mode of Service Hours
10	N	12521	CI-111158 - DSD NOTF TN FD 10 IMPLEMENTED	[case number] Authorization updated multiple times for a service month	When Pending Evidence is Approved and Activated and two previous Assessments exist with IHSS Determination Dates in the same calendar month	Case Owner Supervisor	Authorization	N/A	N/A	N/A	N/A

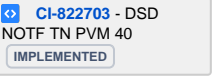
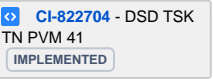
DSD 30/Tasks and Notifications/Provider Management





The following Tasks and Notifications as associated with DSD Section 23A and 23B – Provider Management:

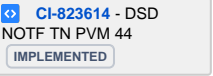
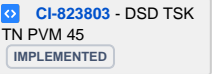
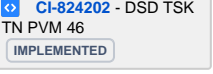
No	T/N	Req ID	CI	Task/Notification Name	Trigger Condition/Screen Action	Task/Notification Recipient	Action Link to Screen	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
1	N	1287 16608		[case name] [case number] Provider [Provider number] is Medi-Cal Suspended or Ineligible	Based upon a match of two of the following three items on the Medi-Cal Suspended and Ineligible Interface file: Provider Name, SSN and Date of Birth Provider is Terminated as of the effective date of the suspension. Notification to the Case Worker (12287) and their Supervisor (16608) for any case the Provider is assigned and in active or leave status.	Case Owner (12287) Case Owner Supervisor (16608)	View Case Provider	N/A	N/A	N/A	Weekly – Friday
2	T	16609		Provider [Provider name] [Provider number] is Medi-Cal Suspended or Ineligible	Based upon a match of two of the following three items on the Medi-Cal Suspended and Ineligible Interface file: Provider Name, SSN and Date of Birth and the Provider is registered with the Public Authority	Provider Management Work Queue	View Case Provider	Task is closed with comment	N/A	High	Weekly – Friday
3	T	16612		[case name] [case number] Provider [Provider number] is Medi-Cal Suspended or Ineligible	Based upon a match of two of the following three items on the Medi-Cal Suspended and Ineligible Interface file: Provider Name, SSN and Date of Birth and the Provider is serving as a WPCS Provider	WPCS Queue	View Case Provider	Task is closed with comment	N/A	High	Weekly – Friday
4	N	16226		[case name] [case number] Provider [Provider number] Added and Terminated in a Single Pay Period.	Provider Added and Terminated within a single pay period. Notice to the Case Owner	Case Owner	View Case Provider	N/A	N/A	N/A	N/A
5				Cancelled by ASR Sprint 47 Team CM&AS							
6	N	12313		[case name] [case number] Provider [Provider number] moved out of State	Provider address is changed to another state when the associated case is in Eligible, Presumptive Eligible or Leave Status	Case Owner	Case Home	N/A	N/A	N/A	N/A
7	N	16599		[case name] [case number] [Provider number] Active Provider [Provider number] End Date Within 30 Days	30 Days prior to the Active Provider End Date	Case Owner	View Case Provider	N/A	N/A	N/A	Weekly – Friday
9				Delete as Duplicate of Program Management #10 & 11							
10	T	16677		[Provider name] [Provider number] Ineligible Provider for Reinstatement Approval	When a previously ineligible Provider is indicated as eligible to serve IHSS on the Provider Enrollment screen.	User's Supervisor	Modify Provider Details	Supervisor must approve or reject update to the Provider's status.	Standard	Medium	N/A
11	N	16677		[Provider name] [Provider number] Ineligible Provider for Reinstatement Approved	When the Supervisor approves the request for Provider reinstatement.	Case Owner	N/A	N/A	N/A	N/A	N/A
12	T	16677		[Provider name] [Provider number] Ineligible Provider for Reinstatement Rejection	When the Supervisor rejects the request for Provider reinstatement.	Case Owner	View Provider Details	Update enrollment and resubmit	Standard	Medium	N/A

14	N	1 6 6 98	 CI-111207 - DSD NOTF TN PVM 14 IMPLEMENTED	[case name] [case number] Provider [Provider number] is Terminated due to updated Enrollment information – [Ineligible Reason].	When Provider is updated to ineligible and the Provider is assigned and active on an existing case	Case Owner	Case Provider	N/A	N/A	N/A	N/A
15	T	1 6 8 51	 CI-117116 - DSD TSK TN PVM 15 IMPLEMENTED	[case name] [case number] Provider [Provider number] is Terminated due to updated Enrollment information – [Ineligible Reason]	When Provider is updated to ineligible and the Provider is assigned as an active WPCS Provider on an existing case	WPCS Queue	Case Provider	WPCS worker must close the task with a comment.	Standard	High	N/A
16	T	2 0 8 55	 CI-637081 - DSD TSK TN PVM 16 IMPLEMENTED	[DO] Review Overtime Violation for Provider [Provider Name] [Provider Number] Case # [Case Number]	When an IHSS Overtime Violation is encountered on: A Timesheet OR a Payment Correction OR a Special Transaction	If Program Type is IHSS - Task is routed to the County Overtime Violation Work Queue associated to the case Else, if Program Type is WPCS – Task is routed to the WPCS Work Queue	View Overtime Violation for specific violation	County Review Outcome other than Pending Review	None	High	N/A
17	T	2 0 8 57	 CI-637082 - DSD TSK TN PVM 17 IMPLEMENTED	[DO] County Dispute Overtime Violation for Provider [Provider Name] [Provider Number] Case # [Case Number]	When the County Dispute Filed Date is populated	Task is routed to the County Overtime Violation Work Queue associated to the case at the time the Dispute was filed	View Overtime Violation for specific violation	County Dispute Outcome other than Pending Review	None	High	N/A
18	T	2 0 8 58	 CI-637083 - DSD TSK TN PVM 18 IMPLEMENTED	[DO] County Dispute Outcome due in four (4) business days [Provider Name] [Provider Number] Case # [Case Number]	When an Overtime Violation has a County Dispute Outcome of Pending Review AND six business days have passed since the "County Dispute Entered Date"	If Program Type is IHSS - Task is routed to the following Work Queues: <ul style="list-style-type: none">County Overtime ViolationSupervisor Overtime Violation Else, if Program Type is WPCS – Task is routed to WPCS Work Queue	View Overtime Violation for specific violation	County Dispute Outcome is other than Pending Review (Action taken by either user will close both worker and supervisor tasks)	None	High	Nightly Overtime Violation Batch
19	T	2 0 8 56	 CI-637084 - DSD TSK TN PVM 19 IMPLEMENTED	[DO] Supervisor Review for Overtime Violation [Provider Name] [Provider Number] Case # [Case Number]	When the County Review Outcome is set to "Override"	Task is routed to the Supervisor Overtime Violation Work Queue associated to the case	View Overtime Violation for specific violation	County Supervisor Review Outcome other than Pending	None	High	N/A
20	T	2 0 8 59	 CI-637085 - DSD TSK TN PVM 20 IMPLEMENTED	[DO] County Dispute Outcome due in two (2) business days [Provider Name] [Provider Number] Case # [Case Number]	When an Overtime Violation has County Dispute Outcome of Pending Review AND eight business days have passed since the "County Dispute Entered Date"	Task is routed to the following Work Queues: <ul style="list-style-type: none">County Overtime ViolationSupervisor Overtime Violation	View Overtime Violation for specific violation	County Dispute Outcome is other than Pending Review (Action taken by either user will close both worker and supervisor tasks)	None	High	Nightly Overtime Violation Batch
21	T	2 0 8 60	 CI-637086 - DSD TSK TN PVM 21 IMPLEMENTED	[DO] Supervisor Dispute Outcome due in two (2) business days [Provider Name] [Provider Number] Case # [Case Number]	When an Overtime Violation has a Supervisor Dispute Outcome of "Supervisor Review" AND eight business days have passed since the "County Dispute Entered Date"	Task is routed to the Supervisor Overtime Violation	View Overtime Violation for specific violation	Supervisor Dispute Outcome is other than Supervisor Review	None	High	Nightly Overtime Violation Batch

22	T	20861		[DO] Dispute Supervisor Review for Overtime Violation [Provider Name] [Provider Number] Case # [Case Number]	When the County Dispute Outcome is set to "Override"	Task is routed to the Supervisor Overtime Violation Work Queue associated to the case	View Overtime Violation for specific violation	County Supervisor Review Outcome other than Pending	No	High	N/A
23	T	20888		WPCS Recipient [Case Number] has no assigned providers.	When a WPCS recipient has active WPCS Hours and has no Active status WPCS Provider Hours segments	WPCS Work Queue	View Case Provider	Close with Comment	N/A	N/A	
24	N	20889		[Provider Name] Ineligible for [Provider Ineligible Reason]	When a provider is terminated for the 3rd or 4th Overtime Violation	Case Owner	Provider Details	N/A	N/A	N/A	
25	N	20890		[Provider Name] Ineligible for [Provider Ineligible Reason]	When a provider is terminated for the 3rd or 4th Overtime Violation	Case Owner Supervisor	Provider Details	N/A	N/A	N/A	
26	T	20891		[Provider Name] Ineligible for [Provider Ineligible Reason]	When a provider is terminated for the 3rd or 4th Overtime Violation	Provider Management Work Queue	Provider Details	Close with comment	N/A	N/A	
27	T	20892		[Provider Name] Ineligible for [Provider Ineligible Reason]	When a provider is terminated for the 3rd or 4th Overtime Violation	WPCS Work Queue	Provider Details	Close with comment	N/A	N/A	
28	N	20893		[Provider Name – Overtime Violation #] dismissed, provider may be reassigned to case."	When the Violation Status for Violation 3 or 4 is set from "Active" to "Inactive"	Case Owner	Provider Details	N/A	N/A	N/A	
29	N	20894		[Provider Name – Overtime Violation #] dismissed, provider may be reassigned to case."	When the Violation Status for Violation 3 or 4 is set from "Active" to "Inactive"	Case Owner Supervisor	Provider Details	N/A	N/A	N/A	
30	T	20895		[Provider Name – Overtime Violation #] dismissed, provider may be reassigned to case."	When the Violation Status for Violation 3 or 4 is set from "Active" to "Inactive"	Provider Management Work Queue	Provider Details	Close with comment	N/A	N/A	
31	T	20896		[Provider Name – Overtime Violation #] dismissed, provider may be reassigned to case."	When the Violation Status for Violation 3 or 4 is set from "Active" to "Inactive"	WPCS Work Queue	Provider Details	Close with comment	N/A	N/A	
32	N	20897		[Provider Name] 90 day ineligibility for Overtime Violation #3 has passed, provider may be reassigned to case."	When the Overtime Violation Ineligible Date for the 3rd Overtime Violation has passed	Case Owner	Provider Details	N/A	N/A	N/A	
33	N	20898		[Provider Name] 90 day ineligibility for Overtime Violation #3 has passed, provider may be reassigned to case."	When the Overtime Violation Ineligible Date for the 3rd Overtime Violation has passed	Case Owner Supervisor	Provider Details	N/A	N/A	N/A	
34	T	20900		[Provider Name] 90 day ineligibility for Overtime Violation #3 has passed, provider may be reassigned to case."	When the Overtime Violation Ineligible Date for the 3rd Overtime Violation has passed	Provider Management Work Queue	Provider Details	Close with comment	N/A	N/A	
35	T	20899		[Provider Name] 90 day ineligibility for Overtime Violation #3 has passed, provider may be reassigned to case."	When the Overtime Violation Ineligible Date for the 3rd Overtime Violation has passed	WPCS Work Queue	Provider Details	Close with Comment	N/A	N/A	
36	T	21045		[CO] [DO] Overtime Violation Exemption Expires in 60 days Case # [Case Number] [Recipient Name]; Provider [Provider Number] [Provider Name]	When Batch Job 600NINMN processes and the most recent Overtime Violation Exemption has an End Date within the next 60 calendar days.	Task is routed to the County Overtime Violation Work Queue	Overtime Violation Exemption	Close with Comment.	No	High	Monthly
37	T	12273		[provider number] Provider Enrollment Due by MM/DD/YYYY[Provider Enrollment Due Date]	When the provider enrollment begin date is 75 days in the past and the provider eligibility is in "Pending" Status	Provider Management Work Queue	Provider Details	Close with comment	N/A	N/A	
38			Cancelled CR 1313 Sprint 25								
39	T	21124		[provider number] Provider has been inactivated on case [case number]	When the pending provider has been inactivated on a case	Provider Management Work Queue	Person Notes	Assign Provider	N/A	N/A	

40	N	21220	<div>  </div>	<p>Provider [Provider name] [Provider number] has been assigned by [case name] [case number] from [Start Date] and timesheets were generated. Please verify that no additional assignment/timesheet issuance is needed for prior to the limited start date allowed for recipient assignments.</p>	<p>IF the Recipient's Initial Authorization Start Date OR ICT Authorization Start Date (if one exists) is prior to the Provider's Effective Date</p> <p>AND the Start Date for the Provider is later than the Provider Effective Date</p> <p>THEN generate the Notification</p> <p>ELSE IF the Recipient's Initial Authorization Start Date OR ICT Authorization Start Date (if one exists) is after the Provider's Effective Date</p> <p>AND the Start Date for the Provider is later than the Recipient ICT Authorization Start Date (if one exists)</p> <p>OR the Start Date for the Provider is later than the Recipient Initial Authorization Start Date (if an ICT does not exist)</p> <p>OR Conversion is the only non-Reassessment, Telehealth, or Change type then use most recent Assessment date</p> <p>THEN generate the Notification</p>	Case Owner	View Case Provider	N/A	N/A	N	Daily - every 15 minutes
41	T	21225	<div>  </div>	<p>Provider [Provider name] [Provider number] has been assigned by [case name] [case number] from [Start Date] and timesheets were generated. Please verify that no additional assignment/timesheet issuance is needed for prior to the limited start date allowed for recipient assignments.</p>	<p>IF the Recipient's Initial Authorization Start Date OR ICT Authorization Start Date (if one exists) is prior to the Provider's Effective Date</p> <p>AND the Start Date for the Provider is later than the Provider Effective Date</p> <p>THEN generate the Task</p> <p>ELSE IF the Recipient's Initial Authorization Start Date OR ICT Authorization Start Date (if one exists) is after the Provider's Effective Date</p> <p>AND the Start Date for the Provider is later than the Recipient ICT Authorization Start Date (if one exists)</p> <p>OR the Start Date for the Provider is later than the Recipient Initial Authorization Start Date (if an ICT does not exist)</p> <p>OR Conversion is the only non-Reassessment, Telehealth, or Change type then use most recent Assessment date</p> <p>THEN generate the Task</p>	Provider Management Queue	View Case Provider	Manual	Normal	Medium	Daily - every 15 minutes

42	T	21236	 CI-822749 - DSD TSK TN PVM 42 	<p>Provider [Provider Name] [Provider Number] was reassigned to [Case Number] by the Recipient using ESP. The Provider Relationship was reported as [Recipient Reported Provider Relationship]. This change was not applied automatically and requires county review.</p>	<p>Generate task during Provider Assignment (640HINDN) batch processing</p> <p>IF</p> <p>'PARENT' was received on webservice</p> <p>AND</p> <p>The Provider Relationship associated with the terminated segment is NOT 'Parent of Adult Child' (PMPR002)</p> <p>OR</p> <p>'SPOUSE' was received on webservice</p> <p>AND</p> <p>The Provider Relationship associated with the terminated segment is NOT 'Spouse' (PMPR003)</p> <p>OR</p> <p>'DOMESTIC PARTNER' was received on webservice</p> <p>AND</p> <p>The Provider Relationship associated with the terminated segment is NOT 'Domestic Partner' (PMPR012)</p> <p>OR</p> <p>'CHILD' was received on webservice</p> <p>AND</p> <p>The Provider Relationship associated with the terminated segment is NOT 'Adult Child' (PMPR005)</p> <p>OR</p> <p>'NONE OF THE ABOVE' was received on webservice</p> <p>AND</p> <p>The Provider Relationship associated with the terminated segment is one of the following:</p> <ul style="list-style-type: none"> 'Parent of Minor Child' (PMPR001) 'Parent of Adult Child' (PMPR002) 'Spouse' (PMPR003) 'Minor Child' (PMPR004) 'Adult Child' (PMPR005) 'Domestic Partner' (PMPR012) 	Provider Management Work Queue	View Case Provider	Close with comment	Standard	Medium	Daily - Every 15 Minutes
43	T	21287	 CI-822983 - DSD TSK TN PVM 43 	<p>Provider [First Name Last Name] [Provider Number] completed an address update using ESP. The new ['residence' OR 'mailing' OR 'residence and mailing'] address is in a state other than California.</p>	<p>Batch job 50XZINDN successfully saves a residence and/or mailing address and State does not = CA</p>	<p>Provider Management Work Queue in each county the Provider is assigned to a case (Active, On Leave or Pending assignment status)</p> <p>Note: One task is generated to the work queue for the county in which the Provider provides services. If multiple Recipients exist in a county, the Recipient with the lowest case number is selected for the task.</p>	Person Home for the Provider	Task is closed with comment	Standard	High	ESSPADress Update

44	N	2 1 3 56		[provider name] [provider number] assigned as Back-Up Provider to [case name] [case number]	When a user other than the Case Owner assigns a new provider, or reassigns existing provider as a BUP to a case or an existing provider was not initially assigned then a user modifies an existing provider hours segment to indicate a BUP	Case Owner	View Case Provider	N/A	N/A	N/A	N/A
45	T	1 2 3 13		[case name] [case number] Provider [Provider number] Address matches Recipient Address	Provider residential address changes by CMIPS or ESP to match the Recipient's residential address OR Recipient Residential Address updates by CMIPS to match Provider Residential Address	Case Owner	Case Home	Task is closed with comment	N/A	Medium	N/A
46	T	2 1 3 75 2 1 3 78		[Provider name] [Provider number] Electronic Form <Form Short Name> is ready for review	When an electronic form associated with this Provider is submitted for review, either from CSP or ESP.	Provider Electronic Forms	Forms and Correspondence - Electronic Forms screen	User must Approve or Reject the electronic form.	N/A	Medium	N/A

DSD 30/Tasks and Notifications/Time and Attendance

The following Tasks and Notifications are associated with DSD Section 24 – Time and Attendance:



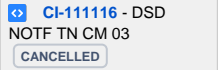
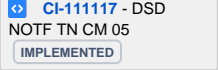

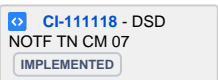

No	T/N	Req ID	CI	Task/Notification Name	Trigger Condition/Screen Action	Task/Notification Recipient	Action Link To	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
01	T	12014	CI-111209 - DSD TSK TN TA 01 IMPLEMENTED	[error code] [error text] Timesheet Exception for Case Number [case number] Provider Number [Provider number].	When a timesheet is processed through TPF and a timesheet exception (hard edit) halts payroll processing.	Task is routed to the county that owned the case when it was Pending, Eligible, Presumptive Eligible or Leave Status to one of the following work queues per the business rule associated to the error:	View Timesheet	Timesheet for same Recipient/Provider relationship and pay period is re-issued Payment correction is approved	One business day Tasks routed to the WPCS Work Queue are not subject to escalation	Low	Run at regular intervals during CMI PS business hours.
02	N	11985	CI-111208 - DSD NOTF TN TA 02 IMPLEMENTED	[case name] [case number] Cross County Timesheet Activity	When any of the following timesheet actions is taken on a case associated to a county other than the user's county location. <ul style="list-style-type: none"> • Timesheet Issuance – Issue • View Timesheet – Release Timesheet • View Timesheet – Reject Timesheet • Timesheet Manual Entry – Time Entries - Save and Save New • Confirm Timesheet Cancellation - Yes 	Case Owner	View Timesheet	The Case Owner should review the timesheet activity.	N/A	N/A	N/A
03	T	20873	CI-674776 - DSD TSK TN TA 03 IMPLEMENTED	[error code] [error text] Travel Claim Exception for Case Number [case number] Provider Number [Provider number].	When a supplemental travel claim is manually entered and the initial travel claim is in "Cancelled" status and the travel claim exception is created.	Task is routed to the county that owned the case when it was Pending, Eligible, Presumptive Eligible or Leave Status to one of the following work queues per the business rule associated to the error:	View Travel Claim	Manual Close	N/A	Low	N/A
04	T	20919	CI-706115 - DSD TSK TN TA 04 IMPLEMENTED	Late Timesheet submitted for Case Number [case number] Provider Number [Provider number]. Issue next timesheet.	When an initial IHSS or WPCS Arrears Timesheet for a pay period is processed from TPF or manually entered and the timesheet is received more than 15 days after the last day of the associated pay period AND A timesheet for the next pay period does not exist	IHSS Task is routed to the county that owned the case when it was Pending, Eligible, Presumptive Eligible or Leave Status to the following work queue per the business rule associated to the error: Timesheets on Hold Work Queue The WPCS Task is routed to the WPCS Work Queue	View Timesheet	User should review activity and should manually issue a Timesheet for the next pay period for the same Recipient/Provider relationship. THEN The Task will be resolved if a future dated timesheet is issued for the Provider/Recipient relationship OR If the Held Timesheet is released by a user or the batch job	N/A	Low	Run at regular intervals during CMI PS business hours.
05	T	21130	CI-819052 - DSD TSK TN TA 05 CANCELLED	Cancelled by CR115 CGI M&O – PSR – EVV Simplification							
06	T	21200	CI-822656 - DSD TSK TN TA 06 IMPLEMENTED	[case name] [case number] Review Timesheet Approval Request – Same County	When an IHSS or WPCS timesheet is submitted for approval by the user selecting the "Yes" button on the Submit Timesheet for Approval pop-up	The IHSS timesheet is routed to the Payments Pending Approval Queue The WPCS timesheet is routed to the WPCS Work Queue and is not subject to escalation	View Timesheet	County payroll approver user with with the TIMESHEETMODIFY or PaymentCorrectionApproval group access should review and reject or approve the pending request This task will be closed when the timesheet changes status from Pending Recipient Electronic Review	If not reserved within three (3) business days, the task will be escalated to the Payroll Supervisor Queue If reserved but not completed within two (2) business days, the task will be escalated to the supervisor of the person who reserved	High	N/A

07	T	21 201		[case name] [case number] Review Timesheet Approval Request – Cross County	When an IHSS timesheet is submitted for approval by a user with a the Cross County Security Group role for a case associated to a county other than the users county by selecting the "Yes" button on the Submit Timesheet for Approval pop-up	The IHSS timesheet is routed to the Payments Pending Approval Queue	View Timesheet	County payroll approver with the Cross County Security Group role should review and reject or approve the pending request This task will be closed when the timesheet changes status from Pending Recipient Electronic Review	If not reserved within three (3) business days, the task will be escalated to the Payroll Supervisor Queue If reserved but not completed within two (2) business days, the task will be escalated to the supervisor of person who reserved	High	N/A
08	N	21 202		[case name] [case number] Timesheet Approval Request Completed	When a payroll approver approves a timesheet approval request by selecting the "Yes" button from the Approval Timesheet pop-up screen and approves a timesheet approval request	Timesheet Approval Requester	View Timesheet	N/A	N/A	N/A	N/A
09	T	21 203		[case name] [case number] Timesheet Approval Request Rejection – See Task History for Rejection Comments	When a Payroll Approver rejects a timesheet approval request by selecting the "Yes" button and providing comments from the Reject Approval Request pop-up screen	Timesheet Approval Requester	View Timesheet	Requester reviews rejection comments and either: (1) Corrects the issue and resubmits for approval or (2) Rejects the timesheet back to the Provider	One Business Day	High	N/A
10	T	21 239 21 185 21 221		Timesheet(s) submitted for Recipient who is either Deceased or on Leave. Please review timesheet(s) and submit for approval, or reject the timesheet(s).	<p>When a Recipient is currently marked as Deceased (with the valid Death Outcome of, "Deceased - No Overpayment", "Deceased - Overpayment, Recovery Initiated" or "Deceased - Overpayment, Fraud Referral Initiated") and a IHSS timesheet is received from TTS or ESP and the timesheet status becomes 'Pending Recipient Electronic Review' status.</p> <p>OR</p> <p>When a Recipient is currently marked as On-Leave (with the valid leave reasons LV01, LV02, LV03, LV04, LV06 or LV07) and a IHSS timesheet is received from TTS or ESP and the timesheet status becomes 'Pending Recipient Electronic Review' status.</p> <p>OR</p> <p>When a IHSS timesheet exists in 'Pending Recipient Electronic Review' and the Recipient is marked as Deceased (with the valid Death Outcome of, "Deceased - No Overpayment", "Deceased - Overpayment, Recovery Initiated" or "Deceased - Overpayment, Fraud Referral Initiated") in CMIPS.</p> <p>OR</p> <p>When a IHSS timesheet exists in 'Pending Recipient Electronic Review' and the Recipient is placed in a status of On-Leave (with the valid leave reasons LV01, LV02, LV03, LV04, LV06 or LV07), in CMIPS, for a period that covers the current date.</p> <p>AND IF</p> <p>There is already an existing open task for a timesheet that met the conditions, and a new trigger occurs, do not create a new task.</p>	Timesheet Eligibility Errors Work Queue	Timesheet Eligibility Errors	Task is closed if all Pending Recipient Electronic Review timesheet(s) are approved/rejected via ESP, TTS, or TPF OR If all timesheet(s) in Pending Recipient Electronic Review have been submitted for approval/rejected by county user.	After one business day, if the task is not reserved, it is routed to the Payroll Supervisor Work Queue If a task is reserved by a user and the task is not completed within one business day, the task will be escalated to the supervisor of the person who reserved the task.	High	N/A

11	T	21 243 21 185 21 221	<div> <div>CI-822788 - DSD TSK TN</div> <div>TA 11 IMPLEMENTED</div> </div>	<p>Timesheet(s) submitted for Recipient who is either Deceased or on Leave. Please review timesheet(s) and submit for approval, or reject the timesheet(s).</p>	<p>When a Recipient is currently marked as Deceased (with the valid Death Outcome of, "Deceased - No Overpayment", "Deceased - Overpayment, Recovery Initiated" or "Deceased - Overpayment, Fraud Referral Initiated") and a WPCS timesheet is received from TTS or ESP and the timesheet status becomes 'Pending Recipient Electronic Review' status.</p> <p>OR</p> <p>When a Recipient is currently marked as On-Leave (with the valid leave reasons LV01, LV02, LV03, LV04, LV06 or LV07) and a WPCS timesheet is received from TTS or ESP and the timesheet status becomes 'Pending Recipient Electronic Review' status.</p> <p>OR</p> <p>When a WPCS timesheet exists in 'Pending Recipient Electronic Review' and the Recipient is marked as Deceased (with the valid Death Outcome of, "Deceased - No Overpayment", "Deceased - Overpayment, Recovery Initiated" or "Deceased - Overpayment, Fraud Referral Initiated") in CMIPS.</p> <p>OR</p> <p>When a WPCS timesheet exists in 'Pending Recipient Electronic Review' and the Recipient is placed in a status of On-Leave (with the valid leave reasons LV01, LV02, LV03, LV04, LV06 or LV07), in CMIPS, for a period that covers the current date.</p> <p>AND IF</p> <p>There is already an existing open task for a timesheet that met the conditions, and a new trigger occurs, do not create a new task.</p>	WPCS Work Queue	<p>Task is closed if all Pending Recipient Electronic Review timesheet(s) are approved/rejected via ESP, TTS, or TPF</p> <p>OR</p> <p>If all timesheet(s) in Pending Recipient Electronic Review have been submitted for approval/rejected by a WPCS user.</p>	N/A	Medium	N/A
12	T	21 224 21 185 21 221	<div> <div>CI-822789 - DSD TSK TN</div> <div>TA 12 IMPLEMENTED</div> </div>	<p>Timesheet(s) submitted for Recipient who is either Deceased or on Leave. Please review timesheet(s) and submit for approval, or reject the timesheet(s).</p>	<p>When a Recipient is currently marked as Deceased (with the valid Death Outcome of, "Deceased - No Overpayment", "Deceased - Overpayment, Recovery Initiated" or "Deceased - Overpayment, Fraud Referral Initiated") and a IHSS timesheet is received from TTS or ESP and the timesheet status becomes 'Pending Recipient Exception Review' status.</p> <p>OR</p> <p>When a Recipient is currently marked as On-Leave (with the valid leave reasons LV01, LV02, LV03, LV04, LV06 or LV07) and a IHSS timesheet is received from TTS or ESP and the timesheet status becomes 'Pending Recipient Electronic Review' status.</p> <p>OR</p> <p>When a IHSS timesheet exists in 'Pending Recipient Exception Review' and the Recipient is marked as Deceased (with the valid Death Outcome of, "Deceased - No Overpayment", "Deceased - Overpayment, Recovery Initiated" or "Deceased - Overpayment, Fraud Referral Initiated") in CMIPS.</p> <p>OR</p> <p>When a IHSS timesheet exists in 'Pending Recipient Exception Review' and the Recipient is placed in a status of On-Leave (with the valid leave reasons LV01, LV02, LV03, LV04, LV06 or LV07), in CMIPS, for a period that covers the current date.</p> <p>AND IF</p> <p>There is already an existing open task for a timesheet that met the conditions, and a new trigger occurs, do not create a new task.</p>	Timesheet Eligibility Errors Work Queue	<p>Task is closed if all Pending Recipient Exception Review timesheet(s) are approved/rejected via ESP, TTS, or TPF</p> <p>OR</p> <p>If all timesheet(s) in Pending Recipient Exception Review have been submitted for approval/rejected by county user.</p>	After one business day, Task is routed to the Payroll Supervisor Work Queue.	High	N/A

DSD 30/Tasks and Notifications/Case Maintenance



























The following Tasks and Notifications are associated with DSD Section 25A and 25B – Case Maintenance:





















No	T/N	Req ID	CI	Task/Notification Name	Trigger Condition/Screen Action	Task /Notification Recipient	Action Link To	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
1	T	12033		[case name][case number] Recipient address changed to Out of State.	When a user other than the Case Owner assigned to the Recipient case keys a change to the Recipient residence address indicating a State other than California (CA), CMIPS shall produce a Task to the Case Owner.	Case Owner	Case Home	Case is Terminated Task is closed with comment	Standard	High	N/A
2	T	12103		[case name] [case number] Change in Medi-Cal Share of Cost	Upon receipt of a change to the Medi-Cal Share of Cost for the current Service Month via MEDS daily/monthly receive file, CMIPS shall produce a Task to the Case Owner.	Case Owner	Medi-Cal Eligibility Information	Create "Change Assessment" and update Income Evidence and authorize the evidence Close Task with a comment indicating the reason no action was necessary.	Standard	Medium	MEDS Daily Receive MEDS Monthly Receive
3				Cancelled with ASR Sprint 48 Team CM&AS							
4				Delete as Duplicate of #42 below. The indicated requirement is no longer valid for DOB change.							
5	N	12149		[case name] [case number] Recipient's SSN has been changed.	When a user other than the Case Owner keys a change to the Recipient's SSN or via an interface CMIPS, shall produce a Notification to the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	MEDS Daily Receive MEDS Monthly Receive
6	T	12163		[case name] [case number] Inter-County Transfer Referral from [sending county]	When the Create Inter-County Transfer screen is saved CMIPS shall send a Task associated to the Recipient case to the "Inter-County Transfer Coordinator" in the "Receiving County."	Inter-County Transfer Coordinator Queue in Receiving County	Case Home	Inter-County Transfer Coordinator assigns worker to Inter-County Transfer screen.	Standard	Medium	N/A
7	N	16268		[case name] [case number] Advance Pay Timesheet not received in 45 days.	When Advance Pay Hours have not been reconciled within 45 day of an Advance Payment issuance, CMIPS shall produce a Notification to the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	Daily or Weekend
8	T	12171		[case name] [case number] Advance Pay Timesheet not received in 75 days.	When Advance Pay Hours have not been reconciled within 75 day of an Advance Payment issuance, CMIPS shall produce a Task to the Case Owner.	Case Owner	Program Evidence	Create "Change Assessment" and change from Advance Pay to Arrears with NOA (Advance Pay to Arrears Pay) indicating change Close Task with a comment indicating the reason no action was necessary.	2 business days	High	Daily or Weekend




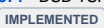









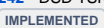
9	N /T	1 6 5 95	<p>T:</p> <p>CI-111143 - DSD TSK TN CM 09 IMPLEMENTED</p> <p>N:</p> <p>CI-120623 - DSD NOTF TN CM 09 IMPLEMENTED</p>	[case name] [case number] Inter-County Transfer – State Hearing Added	<p>When a State Hearing is created on a Recipient case with an "In-Progress" status Inter-County Transfer, CMIPS shall produce a Notification to the Social Worker, if the user taking the action is other than the case owner.</p> <p>(This task will also be sent to the Inter-County Coordinator)</p>	<p>Case Owner (Notification)</p> <p>Assigned Worker in Receiving County if assigned (Notification)</p> <p>(Task) to Inter-County Transfer Coordinator Queue in Receiving County</p>	Case Home	Close Task with a comment	N/A	High	N/A
10	N	1 2 1 79	<p>CI-111120 - DSD NOTF TN CM 10 IMPLEMENTED</p>	[case name] [case number] Inter-County Transfer requested – State Hearing Pending	When a Recipient requests an Inter-County Transfer and a State Hearing, with a status other than Resolved exists, CMIPS shall notify the Case Owner, if the individual taking the action is other than the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	N/A
11	N	1 2 2 61	<p>CI-111121 - DSD NOTF TN CM 11 IMPLEMENTED</p>	[case name] [case number] Recipient Application Withdrawal	When a Withdraw Case screen is saved, CMIPS shall produce a Notification to the Case Owner Supervisor.	Case Owner Supervisor	Case Home	N/A	N/A	N/A	N/A
13	N	1 2 3 04	<p>CI-120624 - DSD NOTF TN CM 13 IMPLEMENTED</p>	[case name] [case number] Case has no assigned Providers	When a Recipient case with IP Mode of Service has no Individual Provider's assigned, CMIPS shall produce a notification to the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	N/A
14	T	1 6 6 13	<p>CI-111144 - DSD TSK TN CM 14 IMPLEMENTED</p>	[case name] [case number] Recipient turns eighteen (18)	CMIPS shall produce a Task to the Case Owner the first of the month prior to the month in which the Recipient turns 18 years old.	Case Owner	Case Home	<p>Case Reassessment is required</p> <p>Close the Task manually after completing the Reassessment or with a comment indicating the reason no action was necessary</p>	Standard	Medium	Recipient turns 18
15	N	1 6 6 15	<p>CI-111123 - DSD NOTF TN CM 15 IMPLEMENTED</p>	[case name] [case number] Paramedical Service Authorization Expiring	CMIPS shall produce a Notification to the Case Owner 15 days prior to the date a Paramedical Services Authorization expires.	Case Owner	Case Home	<p>Case should be evaluated for need for continued services</p> <p>Close the Task with a comment indicating the reason no action was necessary.</p>	Standard	High	Daily and weekend
16	N	1 6 6 14	<p>CI-111124 - DSD NOTF TN CM 16 IMPLEMENTED</p>	[case name] [case number] Time Limited Service Expired	CMIPS shall produce a Notification to the Case Owner 15 days prior to the date when a time limited (one-time only) service, except Paramedical, has expired.	Case Owner	Case Home	N/A	N/A	N/A	Time Limit Service Expired
17	T	1 2 4 60	<p>CI-111125 - DSD TSK TN CM 17 IMPLEMENTED</p>	County Contractor Billing Invoice Received	When a County Contractor Invoice has been processed, CMIPS shall produce a Task to the County Contract Coordinator Work Queue	County Contractor Coordinator Work Queue	View County Contractor (County)	Closed by User	None	N/A	County Contractor Invoice Processing

18	T	1 2 4 96	<div> CI-111145 - DSD TSK TN CM 18 IMPLEMENTED </div>	[case name] [case number] Homemaker/PA Contract Time Ready for Review	When a Homemaker/PA Contract Timesheet has been "Submitted for Approval", CMIPS shall produce a Task to the Homemaker/PA Contract Supervisor.	Homemaker /PA Contract Worker Supervisor	View Homemaker /PA Contract Timesheet	User must Approve or Reject Homemaker /PA Contract Timesheet	Standard	Medium	N/A
19	T	1 6 0 62	<div> CI-111146 - DSD TSK TN CM 19 IMPLEMENTED </div>	[case name] [case number] Disability Determination received from Medi-Cal	When a Medi-Cal Disability Determination is received on a Recipient case CMIPS shall produce a Task to the Case Owner.	Case Owner	Medi-Cal Eligibility Information	Create "Change Assessment" deselecting "Presumptive Eligible" and authorize case Close the Task with a comment indicating the reason no action was necessary	Standard	High	MEDS Daily Receive
20	T	1 6 0 76	<div> CI-111147 - DSD TSK TN CM 20 IMPLEMENTED </div>	[case name] [case number] Recipient's child turned 14	On the first day of the month in which the "child" of a Recipient turns 14, CMIPS shall produce a Task to the Case Owner.	Case Owner	Case Home	Update Assessment Close the Task with a comment indicating the reason no action was necessary	Standard	Medium	Approaching 14th birthday
21				Delete Duplicate of Final Determination #8							
22				Delete Duplicate of Final Determination #9							
23	N /T	1 6 1 81	N: <div> CI-111126 - DSD NOTF TN CM 23 IMPLEMENTED </div> T: <div> CI-111148 - DSD TSK TN CM 23 IMPLEMENTED </div>	[case name] [case number] Inter-County Transfer Cancelled	When an Inter-county Transfer is Cancelled CMIPS shall: If the user cancelling the Inter-County Transfer is other than the Case Owner, produce a Notification to the Case Owner. Produce a Notification to the Inter-County Transfer Coordinator in the Receiving County. Produce a Task to the Inter-County Transfer Assigned Worker in the Receiving County.	Case Owner (Notification) Assigned Worker in Receiving County if assigned (Notification) Inter-County Transfer Coordinator Queue in Receiving County (Task)	Case Home	Close the Task with a comment	N/A	Medium	N/A
24			<div> CI-111127 - DSD TSK TN CM 24 CANCELLED </div>	Cancelled by ASR Sprint 47 Team CM&AS							
25	N	1 6 0 01	<div> CI-111128 - DSD NOTF TN CM 25 IMPLEMENTED </div>	[case name] [case number] Inter-County Transfer Case Assigned	When the Receiving County Inter-County Transfer Coordinator assigns an ICT to a Social Worker, Notification goes to the Assigned Case Owner.	Assigned Worker in Receiving County	Case Home	N/A	N/A	N/A	N/A
26	N	1 6 6 04	<div> CI-111129 - DSD NOTF TN CM 26 IMPLEMENTED </div>	[case name] [case number] Pending Protective Supervision	If the most current Active Evidence has a "Pending Receipt of Additional Information" indication associated with the Protective Supervision Service Type and 30 days have passed since the IHSS Determination Date, CMIPS shall produce a Notification to the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	Pending Protective Supervision


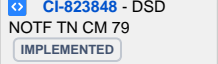
27	N	1 6 03	CI-111130 - DSD NOTF TN CM 27 IMPLEMENTED	[case name] [case number] Pending Paramedical Authorization	If the most current Active Evidence has a Paramedical Services service type with a Paramedical Services Form Sent Date indication, and a blank Paramedical Services Form Received Date and 30 days have passed since the IHSS Determination Date, CMIPS shall produce a Notification to the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	Pending Paramedical Authorization
28	N	1 6 5 97	CI-111149 - DSD NOTF TN CM 28 CANCELLED	[case name] [case number] Recipient SSN/ITIN pending for 60 days.	When the Person Record associated with a case in Pending, Eligible, Presumptive Eligible or Leave Status does not have an "Alternative ID Type Social Security Number" and 60 days have passed since the Application Date	Case Owner	Case Home	N/A	Standard	Medium	No SSN Received
29	T	1 6 5 90	CI-111150 - DSD TSK TN CM 29 IMPLEMENTED	[case name] [case number] No Initial Medi-Cal Eligibility Received	When a SAWS S3 transaction is received AND The 'Medi-Cal Status' is Denied AND The 'Medi-Cal Status Effective Date' is not older than 90 days from the Medi-Cal Eligibility Referral Date, CMIPS shall produce a Task to the Case Owner	Case Owner	Case Home	Issue Manual NOA (DN17); submit for Approval which will result in "Denied" status case Close the task with a comment.	Standard	High	No Initial Medi-Cal Eligibility Received
30	N	1 6 5 91	CI-111131 - DSD NOTF TN CM 30 IMPLEMENTED	[case name] [case number] Initial Medi-Cal Eligibility Received	When an initial Medi-Cal Eligibility transaction is received from MEDS, CMIPS shall produce a Notification to the Case Owner.	Case Owner	Medi-Cal Eligibility Information	N/A	N/A	N/A	MEDS Daily Receive
32	T	1 6 5 92	CI-111151 - DSD TSK TN CM 32 IMPLEMENTED	[case name] [case number] SAWS discontinuance of IHSS Recipient effective [discontinuance date] for reason [discontinuance reason]	When a Medi-Cal Discontinuance is received from SAWS (S3 Transaction), and the Medi-Cal Status Reason is other than 03, 04, 50, 60, 61, 64, 65, 89 or 97 CMIPS shall produce a Task to the Case Owner.	Case Owner	Case Home	Evaluate for Residual Eligibility If case is already Terminated close with comment	Standard	High	SAWS Daily Receive
33	N	1 6 5 93	CI-111132 - DSD NOTF TN CM 33 IMPLEMENTED	[case name] [case number] SAWS Rescission of Discontinuance	When a Medi-Cal Discontinuance Rescission is received from SAWS (S4), notify the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	SAWS Daily Receive
34	N	1 6 5 94	CI-111133 - DSD NOTF TN CM 34 IMPLEMENTED	[case name] [case number] Medi-Cal Eligibility Termination	When the MEDS Monthly Renewal processes and an IHSS case which previously had Medi-Cal Eligibility is no longer Medi-Cal eligible and the IHSS case is in a status of Eligible or Presumptive Eligible, CMIPS will produce a Notification the Case Owner and Case Owner Supervisor.	Case Owner Case Owner Supervisor	Case Home	Evaluate for Residual Eligibility Close with comment	N/A	N/A	MEDS Monthly Receive
35	T	1 6 5 96	CI-111152 - DSD TSK TN CM 35 IMPLEMENTED	[case name] [case number] State Hearing Compliance Form Due	When a Modify State Hearing screen is saved with an Outcome of Grant or Partial Grant/Partial Denial and the Compliance Form Sent Date field is blank, CMIPS shall produce a Task to the Case Owner. **Note – Task is created when Create or Modify State Hearing screen is saved with an Outcome of Granted or Partial Grant/Partial Denial is indicated and the Compliance Form Sent Date is blank	Case Owner	View State Hearing	Indicated the Compliance Form Sent Date on the Create or Modify State Hearing screen.	Standard	Medium	N/A
37	T	1 6 6 57	CI-111153 - DSD TSK TN CM 37 IMPLEMENTED	[case name] [case number] WPCS hours terminated because the IHSS Recipient is Terminated	When a Recipient case with WPCS hours is Terminated, CMIPS shall send a task to the WPCS queue.	WPCS Queue	N/A	Close with Comment	N/A	High	N/A
38	T	1 6 6 58	CI-111154 - DSD TSK TN CM 38 IMPLEMENTED	[case name] [case number] IHSS Recipient is on Leave – verify WPCS Hours	When a Recipient case with WPCS hours is placed in Leave status, CMIPS shall produce a task to the WPCS Work Queue of the case Leave status.	WPCS Queue	N/A	Close with Comment	N/A		N/A
39	N	1 6 6 59	CI-111134 - DSD NOTF TN CM 39 IMPLEMENTED	[case name] [case number] Recipient address change	When a Recipient address change is keyed by a worker other than the Case Owner, CMIPS shall produce a Notification to the Case Owner.	Case Owner	Case Home	N/A	N/A	N/A	N/A
40	T	1 6 6 60	CI-111155 - DSD TSK TN CM 40 IMPLEMENTED	[case name] [case number] WPCS Recipient case back from Leave	When the Recipient case status changes from Leave to Eligible or Presumptive Eligible and WPCS hours were associated with the previous eligibility. CMIPS shall produce a Task to the WPCS worker.	WPCS Queue	Case Home	Closed with Comment	N/A	Medium	N/A

41	N	1 2 1 49	 CI-111135 - DSD NOTF TN CM 41 	[Case Number] [Person Name] SSN updated by SAWS.	When the SSN is updated by the SAWS S2 transaction on a Pending Status case	Case Owner	Case Home	N/A	N/A	N/A	SAWS Daily Receive
42	N	1 2 1 49	 CI-111136 - DSD NOTF TN CM 42 	[Case Number] [Person Name] date of birth updated by SAWS.	When the date of birth of is updated by the SAWS S2 transaction on a Pending Status case.	Case Owner	Case Home	N/A	N/A	N/A	SAWS Daily Receive
43	N	1 6 84	 CI-111137 - DSD NOTF TN CM 43 	[Case Number] [Person Name] name updated by SAWS	When name is updated by the SAWS S2 transaction on a Pending Status case.	Case Owner	Case Home	N/A	N/A	N/A	SAWS Daily Receive
44	N	1 6 85	 CI-111138 - DSD NOTF TN CM 44 	[Case Number] [Person Name] gender updated by SAWS	When the gender is updated by the SAWS S2 transaction on a Pending Status case.	Case Owner	Case Home	N/A	N/A	N/A	SAWS Daily Receive
45	N	1 6 8 25	 CI-117736 - DSD NOTF TN CM 45 	[case name] [case number] Recipient SSN/ITIN pending for 90 days.	When an Applicant or Recipient Person Type record has had a "Blank SSN Reason" other than "Blank" for 90 days from the Application Date and the Case Status is Pending, Eligible, Presumptive Eligible or Leave	Case Owner	Pers on Home	N/A	N/A	N/A	No SSN Received
46	T	1 6 8 26	 CI-117739 - DSD TSK TN CM 46 	[case name] [case number] Recipient SSN/ITIN pending for 120 days.	When an Applicant or Recipient Person Type record has had a "Blank SSN Reason" other than "Blank" for 120 days from the Application Date and the Case Status is Pending, Eligible, Presumptive Eligible or Leave	Case Owner	Pers on Home	Create Alternative ID – Type SSN for the person record or close with comment.	Standard	Me di um	No SSN Received
47	N	1 6 8 24	 CI-117737 - DSD NOTF TN CM 47 	Provider [Provider number] converted without SSN.	When a "Provider" record exists With an Alternative ID Type – Conversion Duplicate And there is no Alternative ID Type – SSN record	Case Owner	Pers on Home	N/A	N/A	N/A	Validate Duplicate SSN Provider
48	N	1 6 7 21	 CI-117738 - DSD NOTF TN CM 48 	[case name] [case number] converted without SSN.	When a Person Type Applicant, or Recipient Person has a "Blank SSN Reason" of "Conversion Duplicate"	Case Owner	Pers on Home	N/A	N/A	N/A	Validate Duplicate SSN Recipient
49	T	1 6 8 44	 CI-117159 - DSD TSK TN CM 49 	[case number] [case name] Inter-County Transfer authorization completed, please assign WPCS Provider.	CMIPS shall produce a Task to WPCS Worker Queue when an Inter-County Transfer assessment is authorized and associated WPCS Providers were Terminated. One task per case is produced.	WPCS Worker	Case Home	Assign Case Provider action to assign WPCS Provider or close manually with comment.	N/A	Me di um	N/A
50	T	1 6 8 45	 CI-117160 - DSD TSK TN CM 50 	[case number] [case name] Inter-County Transfer has been initiated.	CMIPS shall produce a Task to WPCS Worker Queue when an Inter-County Transfer is created and the case currently has WPCS Hours authorized.	WPCS Worker	Case Home	Close with comment.	Standard	Me di um	N/A
51	T	1 6 8 46	 CI-117161 - DSD TSK TN CM 51 	[case number] [case name] Inter-County Transfer has been cancelled.	CMIPS shall produce a Task to WPCS Worker Queue when an Inter-County Transfer is cancelled and the case currently has WPCS Hours authorized.	WPCS Worker	Case Home	Close with comment.	Standard	Me di um	N/A
52	N	1 6 8 47	 CI-117158 - DSD NOTF TN CM 52 	[case number] [case name] Inter-County Transfer completed, please review Workplace Hours.	CMIPS shall produce a Notification to the Case Owner (in the Receiving County) when and Inter-County Transfer assessment is authorized and the associated Workplace Hours were ended.	Case Owner	Case Home	N/A	N/A	N/A	N/A
53	T	1 6 8 81	 CI-118149 - DSD TSK TN CM 53 	[case name] [case number] Health Care Certification due	When the current date is one business day before either the: Health Care Certification "Due Date" OR, if indicated, the Good Cause Extension Due Date AND the case status is not Denied or Application Withdrawn	Case Owner	Health Care Certification screen	Case Termination Or Case Denial Or Health Care Certification screen Health Care Certification Type	Standard	High	Health Care Certification

54	T	1 6 9 31	 CI-444446 - DSD TSK TN CM 54 	[case number] CIN Re-Clearance needed to sync Medi-Cal Eligibility	CMIPS shall trigger a Task to the Case Owner when a Person Type Recipient or Applicant has had a change to any of the following fields First Name And/or Middle Name And/or Last Name And/or Date of Birth And/or Gender and three (3) business days have passed since the change occurred	Case Owner	Alternate ID List	Create Alternate ID Type Client Index Number. Manual closure not allowed.	Standard	Medium	Daily
55	T	1 6 9 32	 CI-444447 - DSD TSK TN CM 55 	[case number] CIN Re-Clearance needed to sync Medi-Cal Eligibility	CMIPS shall trigger a Task to the Case Owner when a Person Type Recipient or Applicant has had a change to Alternate ID Type Social Security Number and three (3) business days have passed	Case Owner	Alternate ID List	Create Alternate ID Type Client Index Number. Manual closure not allowed.	Standard	Medium	Daily
56	T	1 6 9 33	 CI-444448 - DSD TSK TN CM 56 	[case number] Name update received update from SCI [SCI Name First; Middle Name; or Last Name]. Update person name and then process CIN Re-Clearance to sync with Medi-Cal Eligibility	CMIPS shall trigger a Task to the Case Owner when an SCI Daily Update is received and Field Codes 411, 412 or 413 (First Name Middle Name Last Name) are indicated when the CMIPS Case Status is Pending, Eligible, Presumptive Eligible or Leave	Case Owner	Person Home	Create Alternate ID Type Client Index Number. Manual closure not allowed.	Standard	Medium	Daily
57	T	1 6 9 34	 CI-444449 - DSD TSK TN CM 57 	[case number] Date of Birth Update received from SCI [Date of Birth]. Update case Date of Birth and then process CIN Re-Clearance to sync with Medi-Cal Eligibility	CMIPS shall trigger a Task to the Case Owner when an SCI Daily Update is received and the Field Code indication of 408 (Date of Birth) is indicated when the CMIPS Case Status is Pending, Eligible, Presumptive Eligible or Leave	Case Owner	Person Home	Create Alternate ID Type Client Index Number. Manual closure not allowed.	Standard	Medium	Daily
58	T	1 6 9 35	 CI-444450 - DSD TSK TN CM 58 	[case number] Gender Update received from SCI [Gender]. Update case Gender and then process CIN Re-Clearance to sync with Medi-Cal Eligibility	CMIPS shall trigger a Task to the Case Owner when an SCI Daily Update is received and the Field Code indication of 410 (Sex) is indicated when the CMIPS Case Status is Pending, Eligible, Presumptive Eligible or Leave	Case Owner	Person Home	Create Alternate ID Type Client Index Number. Manual closure not allowed.	Standard	Medium	Daily
59	T	1 6 9 36	 CI-444451 - DSD TSK TN CM 59 	[case number] Social Security Number Update received from SCI [Social Security Number]. Update case Social Security Number and then process CIN Re-Clearance to sync with Medi-Cal Eligibility	CMIPS shall trigger a Task to the Case Owner when an SCI Daily Update is received and the Field Code indication of 405 (Social Security Number) is indicated when the CMIPS Case Status is Pending, Eligible, Presumptive Eligible or Leave	Case Owner	Alternate ID List	Create Alternate ID Type Client Index Number. Manual closure not allowed.	Standard	Medium	Daily
60	T	2 0 7 70	 CI-486349 - DSD TSK TN CM 60 	[case number] Incorrect Recipient Authentication Number entered three (3) times. Contact [Recipient name] at [primary Recipient telephone number] to establish a new Recipient Authentication Number.	CMIPS shall trigger a Task to the Timesheet Eligibility Error Work Queue when Case Management receives notice that the incorrect Recipient Authentication Number has been provided to a BVI Assistance Line Agent three (3) times.	Timesheet Eligibility Errors Work Queue	Blind or Visually Impaired screen	Contact BVI Recipient and enter new Recipient Authentication Number	One Day / Timesheet Eligibility Errors Work Queue Supervisor	Medium	Daily
61	T	2 0 7 88	 CI-489867 - DSD TSK TN CM 61 	[case name] [case number] Recipient case Rescission	When a Rescind Case screen is saved CMIPS shall produce a Task to the WPCS Queue when the case had WPCS Hours prior to the termination action	WPCS Queue	Case Home	Close the Task with a comment	N/A	N/A	N/A
62	T	2 0 7 89	 CI-489868 - DSD TSK TN CM 62 	[case name] [case number] SAWS discontinuance of IHSS Recipient effective [discontinuance date] for reason [discontinuance reason]	When a Medi-Cal Discontinuance is received from SAWS (S3 Transaction) on a case with current WPCS Hours, CMIPS shall produce a Task to the WPCS Work Queue.	WPCS Queue	Case Home	Close the Task with a comment	N/A	N/A	SAWS Daily Receive
63	T	2 0 7 90	 CI-489869 - DSD TSK TN CM 63 	[case name] [case number] Medi-Cal Eligibility Termination – WPCS Hours Terminated	When the MEDS Monthly Renewal processes and an IHSS case which previously had Medi-Cal Eligibility (FFP Y) is no longer Medi-Cal eligible (FFP N) AND the IHSS case status is Eligible AND the case has current WPCS Hours CMIPS shall produce a Task to the WPCS Work Queue	WPCS Queue	Case Home	Close the Task with a comment	N/A	N/A	MEDS Monthly Receive

64	T	20791	 CI-489870 - DSD TSK TN CM 64 	[case name] [case number] Companion Case Rescission – Authorization Update Required	When a case in Terminated Status is included in a Companion Case Collection AND the Rescind Case action occurs on the terminated case CMIPS shall produce a Task to the Case Owner on any other case in the Companion Case Collection in Eligible or Presumptive Eligible status.	Case Owner	Case Home	Close the Task with a comment	Standard	High	Case Rescind Action occurs on any case in the Companion Case Collection
65	T	20792	 CI-489871 - DSD TSK TN CM 65 	[case name] [case number] Companion Case – Funding Source Update	When an Update Funding Source is processed against any case in a Companion Case Collection CMIPS shall produce a Task to the Case Owner for all cases in the Companion Case Collection which are in Eligible, or Presumptive Eligible Status	Case Owner	Case Home	Close the Task with a comment	Standard	High	Update Funding Source on any case in Companion Case Collection
66	T	20774	 CI-489933 - DSD TSK TN CM 66 	<Case Number> Case Recipient Phone Number needs to be updated	CMIPS shall trigger a Task to the Case Owner when Case Management receives notice that the telephone number used by TTS to reach a Recipient for Timesheet Review is incorrect.	Case Owner	Phone Numbers	Task Closed by the User OR When Primary Telephone Number of the Recipient is Updated	One Day / N/A	Medium	Daily
67	T		 CI-489934 - DSD TSK TN CM 67 	Cancelled by SCF130							
68				Removed with CR 1183							
69			 CI-507536 - DSD NOTF TN CM 69 	Cancelled by ASR Sprint 47 Team CM&AS							
70	T	16688 16691 16692	 CI-718159 - DSD TSK TN CM 70 	[case name] [Case Number]: Recipient is at risk for termination due to non-compliance with Unannounced Home Visit. Contact county QA staff.	When a Modify Unannounced Home Visit screen is saved (Final visit) And the Outcome is 'Entry Denied' Or the Outcome is 'Uncooperative' Or the Outcome is 'No Contact Made' Or the Outcome is 'Not Available'	Case Owner	Case Home	Terminate the case for reason 'Non-Compliance - UHV'	If no action within five (5) business days, the task will be escalated to the Case Supervisor Queue.	Medium	Daily or Weekend
71	T	16881	 CI-775242 - DSD TSK TN CM 71 	[case name] [case number] Health Care Certification due in 10 days	When the current date is ten (10) business day before either the: Health Care Certification "Due Date" OR, if indicated, the Good Cause Extension Due Date AND the case status is not Denied or Application Withdrawn	Case Owner	Health Care Certification screen	Close with comment	Standard	High	Daily

72	T	2110021193	<div><div></div></div>	The IHSS Electronic Services Portal account for [case name] [case number] was [inactivated/reactivated] on [MM/DD/YYYY] and the recipient has not yet registered for an electronic method of timesheet review to meet the required EVV reporting with their provider(s). Please follow up with the recipient.	When batch job 500DINAN is executed AND The IHSS ESP Status for the recipient is 'Inactive' or 'Reactivated' AND The Case Status is active (Eligible, Presumptive Eligible or Leave) AND The CaseEVVDetails.EVVEffectiveDate IS NOT 12/31/9999 AND CaseEVVDetails.EVVExceptionStatus = NULL AND There is no active TTS Registration AND A task does not already exist for this Case AND The batch date is greater than the IHSS ESP Status Date plus (2) calendar days	Task – Payroll Supervisor Work Queue	View Recipient Timesheet Preferences	Task will automatically close when IHSS ESP Status is updated to 'Active' OR Task will automatically close when TTS registration is completed and updated in CMIPS (IVR or County/Service Desk User Entry)	N/A		Medi-Cal	Trigger the 2 Day ESP Inactivation Task (500DINAN)
73	N	16592	<div><div></div></div>	[case name] [case number] Case Terminated due to SAWS discontinuance of IHSS Recipient effective [discontinuance date] for reason [discontinuance reason]	When a Medi-Cal Discontinuance is received from SAWS (S3 Transaction), and the Medi-Cal Status Reason is 03, 04, 50, 60, 61, 64, 65, 89 or 97 CMIPS shall terminate the case and send a Notification to the Case Owner.	Case Owner	Case Home Screen	N/A	N/A	N/A	SAWS Daily Receive	
74	N	160502119021194	<div><div></div></div>	[case name] [case number] Case Terminated due to SAWS discontinuance was rescinded on [rescind date]. Please review case to determine provider reinstatement and case needs.	Process MEDS file with restored eligibility information for case AND Verify that the case rescind AND Confirm that the new notification was sent to the Case Owner	Case Owner	Case Home	N/A	N/A	N/A	501DINMN	
75	N	211901202716050212204	<div><div></div></div>	[case name] [case number] It has been 90 days since this case was terminated for Non-Compliance with Medi-Cal. The auto rescind function is now disabled.	When batch job 501DINMN is executed AND the case that was terminated for Non-Compliance is still in terminated status after 90 days.	Case Owner	Case Home	N/A	N/A	N/A	501DINMN	
76	T	21249	<div><div></div></div>	SAWS provided SSN [S2 SSN Value] for [case name] [case number]. This SSN matches an SSN for another person in CMIPS. SAWS transaction was not processed.	When an S2 transaction is received for a 'Pending' IHSS Case: IF the Applicant SSN on the S2 does not match the SSN on the Person record associated with the IHSS Case Number AND It does match an Active (non-ended) SSN Alternative ID value for another person in CMIPS	Case Owner	Person Home	Task is closed with comment	Standard	High	SAWS Daily Receive	

77	T	2 1 2 55		SAWS provided CIN [S2 CIN Value] for [case name] [case number]. This CIN matches a CIN for another person in CMIPS. SAWS transaction was not processed. CIN must now be updated manually.	<p>When an S2 transaction is received for a 'Pending' IHSS Case:</p> <p>IF the Applicant CIN on the S2 does not match the CIN on the Person record associated with the IHSS Case Number</p> <p>AND</p> <p>It does match an Active (non-end dated) CIN Alternative ID value for another person in CMIPS</p>	Case Owner	N/A	Task is closed with comment	Standard	High	SAWS Daily Receive
78	N	1 6 1 92		[case name] [case number] Recipient case - Rescission	When a Rescind Case screen is saved CMIPS shall produce a notification to the Case Owner Supervisor.	Case Owner Supervisor	Case Home	N/A	N/A	N/A	N/A
79	T	1 2 3 13		[case name] [case number] Recipient Address Matches Provider [provider number] Address	<p>Provider residential address changes by CMIPS or ESP to match the Recipient's residential address</p> <p>OR</p> <p>Recipient Residential Address updates by CMIPS to match Provider Residential Address</p>	Case Owner	Case Home	Task is closed with comment	N/A	Medium	N/A
80	T	2 1 3 86		[case name][case number] Electronic Form <Form Name> is ready for review	When an electronic form associated with this Recipient is submitted for review from CSP, when the submitter is not the Case Owner.	Case Owner	Forms and Correspondence - Electronic Forms screen	User must Approve or Reject the electronic form.	N/A	Medium	N/A
81	T	2 1 3 87		[case name][case number] Electronic Form <Form Name> is ready for review	When an electronic form associated with this Recipient is submitted for review from ESP.	Case Owner	Forms and Correspondence - Electronic Forms screen	User must Approve or Reject the electronic form.	N/A	Medium	N/A

DSD 30/Tasks and Notifications/Program Management

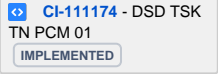
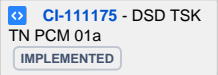
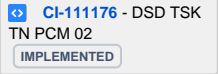
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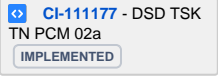
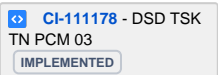
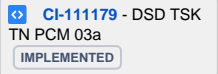

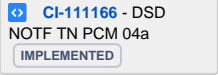
No	T/N	Req ID	CI	Task/Notification Name	Trigger Condition/Screen Action	Task/Notification Recipient	Action Link To	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
1	T/N	12081	<p>T: CI-111188 - DSD TSK TN PGM 01 IMPLEMENTED</p> <p>N: CI-111180 - DSD NOTF TN PGM 01 IMPLEMENTED</p>	<p>[case name] [case number] Case Review Approval</p> <p>[case number] Case Review Rejection - [reason]</p>	Upon Approval (Notification) or Rejection (Task) of a Case Authorization by the Supervisor	Case Owner	Case	Rejection case authorization, the Case Worker must resubmit the case for approval.	Standard	High	N/A
2	N	11988	CI-111181 - DSD NOTF TN PGM 02 IMPLEMENTED	Multiple New Cases Assigned: <# of cases> cases have been assigned to you.	When multiple new cases are assigned to a Case Owner through Bulk Caseload Assignment batch job (700MINDN).	Case Owner	My Cases	N/A	N/A	N/A	N/A
3	N	12350	CI-111182 - DSD NOTF TN PGM 03 IMPLEMENTED	[case name] [case number] Case pending approval 5 days	When a case is submitted for approval and has not been approved or rejected by the Supervisor for 5 business days	Case Owner	Case	N/A	N/A	N/A	Daily
4	T/N	12529 12658 12659 12660 12661	<p>N: CI-111183 - DSD NOTF TN PGM 04 IMPLEMENTED</p> <p>T: CI-111189 - DSD TSK TN PGM 04 IMPLEMENTED</p>	<p>[case name] [case number] Treatment Authorization Request (TAR) Approval for [claim type] units [units] effective [start date] to [end date]</p>	<p>Upon receipt of a TAR for a case through the DHCS TAR Interface for a case in Pending, Eligible, Presumptive Eligible or Leave status</p> <p>Task is sent to Case Worker for any case with approved In-patient or Long Term Care TAR (12529)</p> <p>Notification sent to Case Worker for any case with approved Adult Day Health Care TAR (16558, 16559, 16561)</p> <p>Notification sent to Case Worker for any case with a pending In-patient, Long Term Care of Adult Day Health Care TAR (16558, 16559, 16561)</p>	<p>Task is sent to Case Worker for any case with approved In-patient or Long Term Care TAR (12529)</p> <p>Notification sent to Case Worker for any case with approved Adult Day Health Care TAR (16560)</p> <p>Notification sent to Case Worker for any case with a pending In-patient, Long Term Care of Adult Day Health Care TAR (16558, 16559, 16561)</p>	Case	<p>Action Required for Task for Inpatient/Long Term Care:</p> <p>Update the Recipient Case Assessment or close the task with comment.</p>	Standard	High	Weekly – Friday
5	N	12519	CI-111184 - DSD NOTF TN PGM 05 IMPLEMENTED	[case name] [case number] [Provider number] has Multiple Forged Warrant Affidavits	Notification to the Supervisor when more than 1 forged Warrant affidavit is submitted in a year for a Provider or Recipient	Case Owner Supervisor	Payment Search	N/A	N/A	N/A	N/A
6				Delete Duplicate Provider Management #4							
7				Delete Duplicate Final Determination #10							
8	T	126581	CI-111190 - DSD TSK TN PGM 08 IMPLEMENTED	[case name] [case number] Paid Claim Match for [mm/yy] month	Upon receipt of the monthly Medi-Cal Service Match file.	QA Queue	Paid Claims List	<p>Update the Outcome on the Modify Paid Claim screen</p> <p>Close the task with comment</p>	Standard – Escalation goes to QA Supervisor	High	Medi-Cal Service Match

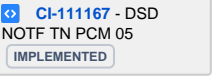
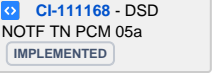
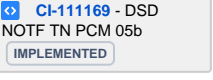
9	T	1 6 5 82		[case name] [case number] Paid Claim Match for [mm/yy] month not reserved	Five business days after the task is initially assigned to the QA queue and is not reserved to a user.	QA Supervisor Queue	P a i d C l a i m s L i s t	Task to the QA Supervisor queue if the paid claim task in the QA queue is not reserved by a QA worker within five business days. Action Required: The task must be closed with a comment.	N/A	L o w	Medi-Cal Service Match Escalation
10	T	1 2 2 66 1 6 6 05		Recipient: [case name] [case number] Recipient Death Notification - Source [MEDS, CDPH,] Provider: [case name] [case number] Provider [Provider number] Provider Death Notification - Source [source] (SSA, CDPH)	When a death match record is received from CDPH, MEDS, or SSA and the Date of Death is not populated for the Person	Case Owner	P e r s o n H o m e	Send Case Owner a task indicating individual has been indicated as deceased. Action Required: The Case Worker must investigate the death match and update the Death Outcome.	Standard	H i g h	MEDS Daily CDPH Death Match SSA SSN Verification
11	T	1 6 6 45		Recipient: [case name] [case number] Recipient Death Notification - Source SCO Provider: [case name] [case number] Provider [Provider number] Provider Death Notification - Source SCO	When a death match record is received from SCO and the Date of Death is not populated for the Person	QA Queue	P e r s o n H o m e	Send QA queue a task indicating individual has been indicated as deceased. Action Required: The QA Worker must investigate the death match and update the Death Outcome.	Standard	H i g h	SCO Death Match
12	T	1 2 2 66		[name] [case number] Death Confirmed	When a death is confirmed on the Person screen by a user other than the case owner and person is active as a Recipient.	Case Worker	P e r s o n H o m e	Terminate the case	2 business days	H i g h	N/A
13	N	1 6 6 93		[case name] [case number] [Provider number] Provider Terminated due to Confirmed Death	When a death is confirmed on the Person screen and the active Provider has been terminated by the system.	Case Worker	V i e w C a s e P r o v i d e r	N/A	N/A	N /A	N/A
14	T	1 6 6 93		[case name] [case number] [Provider number] Provider Terminated due to Confirmed Death	When a death is confirmed on the Person screen and the active WPCS Provider has been terminated by the system.	WPCS Queue	V i e w C a s e P r o v i d e r	Close the task with a comment	N/A	H i g h	N/A

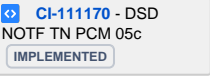
DSD 30/Tasks and Notifications/Payroll within Case Management

The following Tasks and Notifications are associated with DSD Section 27A & 27B – Payroll within Case Management:

No	T/N	Req ID	CI	Task/Notification Name	Trigger Condition /Screen Action	Task/Notification Recipient	Action Link To	Required Action for Closure	Deadline / Escalation	Task Priority	Batch Cycle
1	T	16205 12732		[case name] [case number] Review Special Transaction Request	When a Special Transaction is submitted for approval for a case associated to the user's county location	Payments Pending Approval Queue (IHSS) Notes: (1) Tasks related to WPCS transactions are routed to the WPCS work queue and are not subject to escalation. (2) Tasks related to Buyout Reimbursement, Writ of Administrative Mandamus, or Legislative Change Special Transactions are routed to the CDSS Payment Pending Approval work queue and are not subject to escalation.	View Special Transaction	The Payroll Approver should approve or reject the pending request.	If not reserved within three (3) business days, the task will be escalated to the Payroll Supervisor Queue. If reserved but not completed within two (2) business days, the task will be escalated to the supervisor of person who reserved.	High	N/A
1a	T	16205		[case name] [case number] Review Payment Correction Request	When a Payment Correction is submitted for approval for a case associated to the user's county location Submit Payment Correction for Approval – Yes	Payments Pending Approval Queue Notes: (1) Tasks related to WPCS payment corrections are routed to the WPCS work queue and are not subject to escalation.	View Payment Correction	The Payroll Approver should approve or reject the pending request.	If not reserved within three (3) business days, the task will be escalated to the Payroll Supervisor Queue. If reserved but not completed within two (2) business days, the task will be escalated to the supervisor of person who reserved.	High	N/A
2	T	16205 12732		[case name] [case number] Review Special Transaction Request – Cross County	When a Special Transaction is submitted for approval by a user with a Security Role that includes the Cross County Security Group for a case associated to a county other than the user's county location Submit Special Transaction for Approval – Yes	Payments Pending Approval Queue	View Special Transaction	A Payroll Approver with a Security Role that includes the Cross County Security Group should approve or reject the pending request.	If not reserved within three (3) business days, the task will be escalated to the Payroll Supervisor Queue. If reserved but not completed within two (2) business days, the task will be escalated to the supervisor of person who reserved.	High	N/A

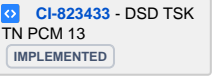
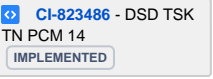
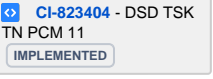
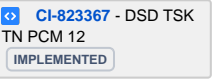
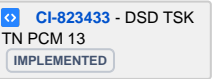
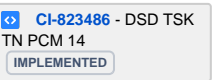
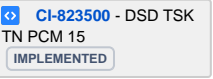
2a	T	1 6 2 05		[case name] [case number] Review Payment Correction Request – Cross County	When a Payment Correction is submitted for approval by a user with a Security Role that includes the Cross County Security Group for a case associated to a county other than the user's county location Submit Payment Correction for Approval – Yes	Payments Pending Approval Queue	View Payment Correction	A Payroll Approver with a Security Role that includes the Cross County Security Group should approve or reject the pending request.	If not reserved within three (3) business days, the task will be escalated to the Payroll Supervisor Queue. If reserved but not completed within two (2) business days, the task will be escalated to the supervisor of person who reserved.	High	N/A
3	T	1 6 6 55 1 2 7 32		[case name] [case number] Special Transaction Request Rejection – See Task History for Rejection Comments	When a Payroll Approver rejects a Special Transaction request Reject Special Transaction – Reject Special Transaction	Special Transaction Requester	View Special Transaction	Requester reviews rejection comments and either (1) Corrects the issue and resubmits for approval (2) Cancels the request.	Standard	High	N/A
3a	T	1 6 6 55 1 2 7 32		[case name] [case number] Payment Correction Request Rejection – See Task History for Rejection Comments	When a Payroll Approver rejects a Payment Correction request Reject Payment Correction – Reject Payment Correction	Special Transaction Requester	View Payment Correction	Requester reviews rejection comments and either (1) Corrects the issue and resubmits for approval (2) Cancels the request.	Standard	High	N/A
4	N	1 6 6 56 1 2 7 32		[case name] [case number] Special Transaction Request Approval	When a Payroll Approver approves a Special Transaction request Approve Special Transaction – Yes	Special Transaction Requester	View Special Transaction	N/A	N/A	N/A	N/A
4a	N	1 6 6 56 1 2 7 32		[case name] [case number] Payment Correction Request Approval	When a Payroll Approver approves a Payment Correction request Approve Payment Correction – Yes	Special Transaction Requester	View Payment Correction	N/A	N/A	N/A	N/A


5	N	1 2 0 62 1 2 7 46 1 6 4 49		[case name] [case number] Cross County [Void/Reissue /Replacement or Copy of Cashed Warrant or Forged Endorsement Affidavit] [Request or Create or Cancel or Modify] Activity on Warrant Number [warrant number]	When a payroll action is taken on a case associated to a county other than the user's county location. Request Void/Reissue /Replacement - Submit Request Cancel Void/Reissue /Replacement Request - Yes Request Copy of Cashed Warrant - Yes Modify Cashed Warrant Copy Request - Save Cancel Cashed Warrant Copy Request - Yes Create Forged Endorsement Affidavit - Save Cancel Forged Endorsement Affidavit - Yes Modify Forged Endorsement Affidavit - Save Note: Actions taken by WPCS users are not subject to notification.	Case Worker	View Payment Details	No Action is required, but the Case Owner should review the payroll activity.	N/A	N /A	N /A
5a	N	1 2 1 93 1 6 6 55 1 6 6 56 1 2 7 32		[case name] [case number] Cross County Special Transaction [Approve or Cancel] Activity	When a payroll action is taken on a case associated to a county other than the user's county location. Approve Special Transaction – Yes Cancel Special Transaction (after Approval only) – Yes Note: Actions taken by WPCS users are not subject to notification.	Case Owner	View Special Transaction	No Action is required, but the Case Owner should review the payroll activity.	N/A	N /A	N /A
5b	N	1 6 6 55 1 6 6 56 1 2 7 32		[case name] [case number] Cross County Payment Correction [Approve or Cancel] Activity	When a payroll action is taken on a case associated to a county other than the user's county location. Approve Payment Correction – Yes Cancel Payment Correction (after Approval only) - Yes Note: Actions taken by WPCS users are not subject to notification.	Case Owner	View Payment Correction	No Action is required, but the Case Owner should review the payroll activity.	N/A	N /A	N /A

5c	N /T	2 1 1 15		<p>[case name] [case number]/[provider name] Cross County Overpayment Recovery [Submit or Cancel or Stop] Activity</p> <p>When a payroll action is taken on an Overpayment Recovery associated to a case in a county other than the user's county location.</p> <p>Submit Overpayment Recovery – Yes</p> <p>Cancel Overpayment Recovery – Yes</p> <p>Stop Overpayment Collection – Stop</p> <p>IF the payee is a recipient – Trigger Notification to case owner</p> <p>ELSE the payee is a provider – Trigger Task to Payroll Supervisor Work Queue</p> <p>Note: Actions taken by WPCS users are not subject to notification.</p>	<p>Task – Payroll Supervisor Work Queue</p> <p>Notification – Case Owner</p>	View Overpayment Recovery	No Action is required, but the Case Owner should review the payroll activity.	N/A	N /A	N /A
5d	N /T	2 1 1 16		<p>[case name] [case number]/[provider name] Cross County Overpayment Collection [Create or Cancel] Activity on [Date Collected]</p> <p>When a payroll action is taken on a case associated to a county other than the user's county location.</p> <p>Create Overpayment Collection – Save and Save & New</p> <p>Cancel Overpayment Collection – Yes</p> <p>IF the payee is a recipient – Trigger Notification to case owner</p> <p>ELSE the payee is a provider – Trigger Task to Payroll Supervisor Work Queue</p> <p>Note: Actions taken by WPCS users are not subject to notification.</p>	<p>Task – Payroll Supervisor Work Queue</p> <p>Notification – Case Owner</p>	Overpayment Recovery Collections	No Action is required, but the Case Owner should review the payroll activity.	N/A	N /A	N /A
5e	N	1 2 1 58		<p>[case name] [case number] Cross County Advance Pay [No Further Action or Un-Reconcile] Activity for Service Month [Service Month From Date – Service Month To Date]</p> <p>When a payroll action is taken on a case associated to a county other than the user's county location.</p> <p>Advance Pay Recon Actions – Save</p> <p>Note: Actions taken by WPCS users are not subject to notification</p>	Case Owner	Payment Search by Case	No Action is required, but the Case Owner should review the payroll activity.	N/A	N /A	N /A

6	N /T	2 1 1 17	<div><div><div><div><div></div><div>CI-111173 - DSD NOTF TN PCM 06</div><div>IMPLEMENTED</div></div></div></div></div>	[case name] [case number]/ [provider name] [provider number] Overpayment Recovery Complete	When a collection is made that fully satisfies the overpayment (balance is drawn down to zero) and no additional Overpayment Recoveries exist for the payee. Create Overpayment Collection – Save Modify Overpayment Collection - Save Internal Interface – Receive Payroll Overpayment Collection IF the payee is a recipient – Trigger Notification to case owner ELSE the payee is a provider – Trigger Task to Payroll Supervisor Work Queue Note: WPCS overpayments are not subject to notification	Task – Payroll Supervisor Work Queue Notification – Case Owner	View Overpayment Recovery	The Case Owner should review the case to determine if there are any Provider payments pending due to the overpayment.	N/A	N /A	N /A
07	N	2 0 8 73	<div><div><div><div><div></div><div>CI-673789 - DSD NOTF TN PCM 07</div><div>IMPLEMENTED</div></div></div></div></div>	Case Number [case number] Provider Number [Provider number] – Travel Claim [Travel Claim Number] has been cancelled by voided payment.	When a travel claim is updated to “Cancelled” status by a voided payment.	Notification is routed to the county that owned the case when it was Pending, Eligible, Presumptive Eligible or Leave Status to one of the following work queues per the business rule associated to the error: - Case Owner	View Travel Claim	User should review the travel claim activity.	N/A	N /A	N /A
08	T	2 0 8 73	<div><div><div><div><div></div><div>CI-673788 - DSD TSK TN PCM 08</div><div>IMPLEMENTED</div></div></div></div></div>	Case Number [case number] Provider Number [Provider number] – Travel Claim [Travel Claim Number] has been cancelled by voided payment.	When a travel claim is updated to “Cancelled” status by a voided payment.	Task is routed to the county that owned the case when it was Pending, Eligible, Presumptive Eligible or Leave Status to one of the following work queues per the business rule associated to the error: WPCS Work Queue	View Travel Claim	Manual Close	N/A	L ow	N /A
09	T	2 1 1 13	<div><div><div><div><div></div><div>CI-813304 - DSD TSK TN PCM 09</div><div>IMPLEMENTED</div></div></div></div></div>	[case name] [case number]/[provider name] [provider number] Overpayment Recovery Completed – additional Pending Overpayments exist	When a collection is made that fully satisfies the overpayment (balance is drawn down to zero). AND the status is set to “Closed” AND a “Pending” Status Overpayment Recovery exists trigger the Task to the Payroll Supervisor Work Queue Note: WPCS overpayments are not subject to notification	Task – Payroll Supervisor Work Queue	View Overpayment Recovery	Provider Management staff should review the case and notify their Payroll Department to review existing Pending Overpayments for submission	N/A	Hi gh	D aily

10	T	2 1 1 14		[provider name] [provider number] has been assigned to [case name] [case number] in [county name] County and has a [Overpayment Recovery Status] status Overpayment Recoveries	When either the "Assign Case Provider" or "Create Provider Hours" action are taken against a provider who was previously terminated for all recipient cases AND that provider is the Payee on a "Pending" or "Active" status Overpayment Recovery Note: WPCS overpayments are not subject to notification	Task – Payroll Supervisor Work Queue	View Overpayment Recovery	The Provider Management staff should review the Overpayment Recovery recover and take action as needed.	N/A	N/A	N/A
11	T	2 1 3 52		Training Time Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker has submitted a Training Time Claim for approval in CM.	CDSS Payments Pending Approval	View Training Time Claim	Task is closed when Training Time Claim is approved or the approval request is rejected (No manual closure) or when worker cancels an approval request (1st level approval cancels the request).	N/A	High	N/A
11	T	2 1 3 52		Training Time Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker has submitted a Training Time Claim for approval in CM.	CDSS Payments Pending Approval	View Training Time Claim	Task is closed when Training Time Claim is approved or the approval request is rejected (No manual closure) or when worker cancels an approval request (1st level approval cancels the request).	N/A	High	N/A
12	T	2 1 3 50		Training Time Claim for Case [Case Number] Provider [Provider Number]	When a Provider submits a Training Time claim in ESP.	CDSS Career Pathways work queue	View Training Time Claim - clicking this link will navigate the user to the training time claim record	Task is closed when CDSS worker submits the Training Time claim for approval or rejects it (no payment).	N/A	High	N/A
13	T	2 1 3 52		Rejected Training Time Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker has rejected a training time claim approval request in CM.	The 'Submitted By' worker on the claim record	View Training Time Claim - clicking this link will navigate the user to the training time claim record	Task is closed when Training Time Claim is submitted for approval or rejected	N/A	High	N/A
11	T	2 1 3 52		Training Time Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker has submitted a Training Time Claim for approval in CM.	CDSS Payments Pending Approval	View Training Time Claim	Task is closed when Training Time Claim is approved or the approval request is rejected (No manual closure) or when worker cancels an approval request (1st level approval cancels the request).	N/A	High	N/A
12	T	2 1 3 50		Training Time Claim for Case [Case Number] Provider [Provider Number]	When a Provider submits a Training Time claim in ESP.	CDSS Career Pathways work queue	View Training Time Claim - clicking this link will navigate the user to the training time claim record	Task is closed when CDSS worker submits the Training Time claim for approval or rejects it (no payment).	N/A	High	N/A

13	T	2 1 3 52		Rejected Training Time Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker has rejected a training time claim approval request in CM.	The 'Submitted By' worker on the claim record	View Training Time Claim - clicking this link will navigate the user to the training time claim record	Task is closed when Training Time Claim is submitted for approval or rejected	N/A	High	N/A
14	T	2 1 3 52 2 1 3 55		[Training Incentive] Claim for Case [Case Number] Provider [Provider Number]	Provider submits an incentive claim type in ESP.	CDSS Career Pathways work queue	View Incentive Claim - clicking this link will navigate the user to the incentive claim record	Task is closed when the incentive claim is submitted for approval or rejected.	N/A	High	N/A
11	T	2 1 3 52		Training Time Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker has submitted a Training Time Claim for approval in CM.	CDSS Payments Pending Approval	View Training Time Claim	Task is closed when Training Time Claim is approved or the approval request is rejected (No manual closure) or when worker cancels an approval request (1st level approval cancels the request).	N/A	High	N/A
12	T	2 1 3 50		Training Time Claim for Case [Case Number] Provider [Provider Number]	When a Provider submits a Training Time claim in ESP.	CDSS Career Pathways work queue	View Training Time Claim - clicking this link will navigate the user to the training time claim record	Task is closed when CDSS worker submits the Training Time claim for approval or rejects it (no payment).	N/A	High	N/A
13	T	2 1 3 52		Rejected Training Time Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker has rejected a training time claim approval request in CM.	The 'Submitted By' worker on the claim record	View Training Time Claim - clicking this link will navigate the user to the training time claim record	Task is closed when Training Time Claim is submitted for approval or rejected.	N/A	High	N/A
14	T	2 1 3 52 2 1 3 55		[Training Incentive] Claim for Case [Case Number] Provider [Provider Number]	Provider submits an incentive claim type in ESP.	CDSS Career Pathways work queue	View Incentive Claim - clicking this link will navigate the user to the incentive claim record	Task is closed when the incentive claim is submitted for approval or rejected.	N/A	High	N/A
15	T	2 1 3 52 2 1 3 55		[Training Incentive] Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker submits an incentive claim for approval in CM.	CDSS Payments Pending Approval work queue	View Incentive Claim - clicking this link will navigate the user to the incentive claim record	Task is closed when incentive claim is approved or the approval request is rejected (No manual closure) or when worker cancels an approval request (1st level approval cancels the request).	N/A	High	N/A

16	T	2 1 3 52 2 1 3 55	<div>  CI-823501 - DSD TSK TN PCM 16 <div>IMPLEMENTED</div> </div>	Rejected [Training Incentive] Claim for Case [Case Number] Provider [Provider Number]	When a CDSS worker rejects the incentive claim approval request.	The 'Submitted By' worker on the claim record	View Training Time Claim - clicking this link will navigate the user to the training time claim record	Task is closed when the CDSS worker re-submits the incentive claim for approval or rejects it.	N/A	High	N/A
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DSD 30/Tasks and Notifications/Internal Operations

The following Tasks and Notifications as associated with DSD Section 32 - Internal Operations

No	T/N	Req ID	CI	Task/ Notification Name	Trigger Condition/Screen Action	Task/Notification Recipient	Action Link to	Required Action for Closure	Deadline/ Escalation	Task Priority	Batch Cycle
01	T	20873 20874 21147 21148	 CI-822312 - DSD TSK TN IO 01 IMPLEMENTED	[error code] [error text] - Travel Claim Exception	While processing TPF Travel Claim and TPF Error is present.	Task is routed to the TravelClaimErrors Work Queue	View Travel Claim (Internal Operations)	Auto Close	10 days (No escalation)	Low	N/A
02	T	21149	 CI-822321 - \$exception Message	[error code] [error text] - Sick Leave Claim Exception	While processing Sick Leave Claim TPF Error is present.	Task is routed to the SickLeaveClaimErrors Work Queue	View Sick Leave Claim	Auto Close	10 days (No escalation)	Low	N/A