AWA County Web
User Documentation

Change Control September 2009

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1 Change Control September 2009

This BRD only includes requirements for changes requested. This should not be viewed as complete requirements for any screen or function.

1.1 Summary of Changes Included

Request	Description
Add Next ISP Date	The Client Overview screen will be modified to include the Client’s Next ISP date.
New Tickler Screen	Add Tickler functionality. First tickler notifies Counties of the Clients with Next ISPs due in 60 days
Change Labels	Changes labels: Min Units/Month & Max Units/Month to Min Hours/Month and Max Hours/Month Adjust table columns to display data consistently.
Display Overall Employment Support Level	The Client Overview screen will be modified to include the Client’s Overall Employment Support Level
Add field to billing Upload/download	Add site hours to GSE and SI/PVS.

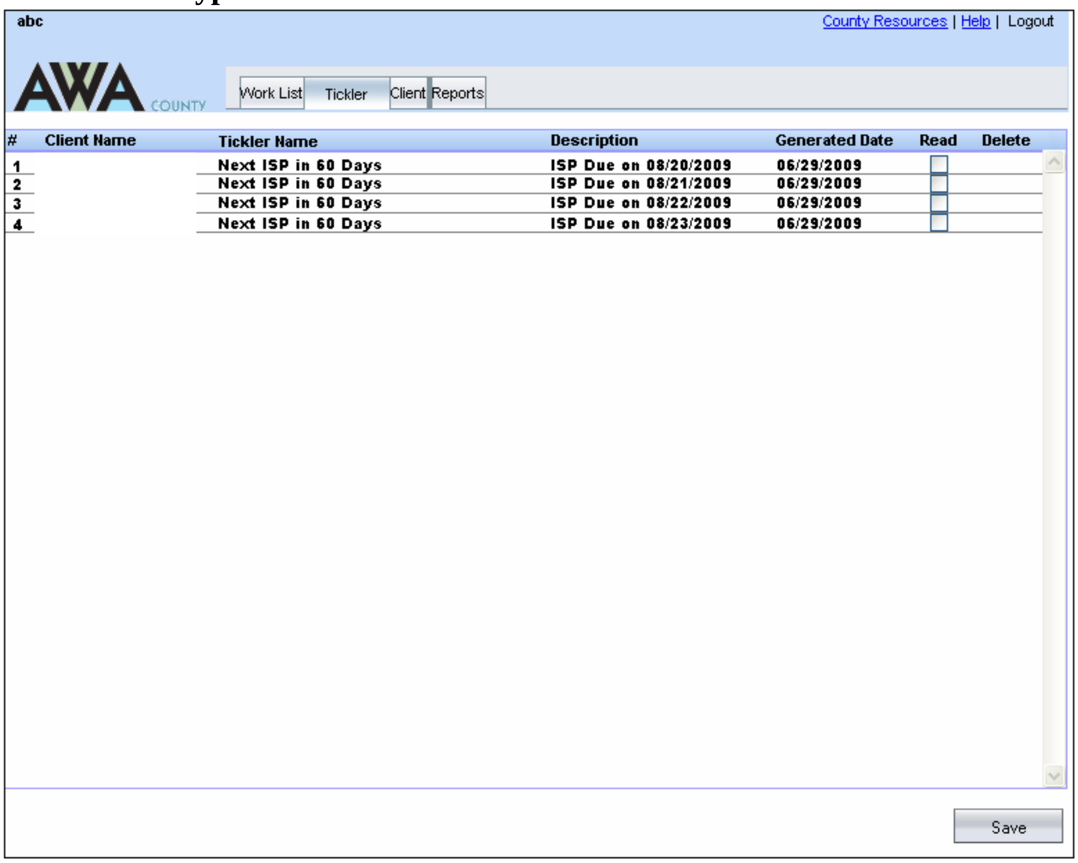
2 Screen Based Requirements

2.1 Tickler Tab

2.1.1 Tickler Inbox screen

The Tickler screen displays all ticklers generated for the County. Ticklers can be marked as Read. Ticklers remain on the list until they are marked as deleted by a County user or the tickler specified time frame is met.

2.1.1.1 Prototype: Tickler screen



2.1.1.2 Business Requirements

2.1.1.2.1 List all Ticklers generated for the County.

2.1.1.2.2 Ticklers are generated by a nightly job based on Tickler specific criteria. See AWA County Web Ticklers for tickler specific criteria.

2.1.1.2.3 Default Sort Order: generated date, descending and then by client name & then by Tickler name.

2.1.1.2.4 Client Name on a tickler will link to the Client Tab, Client Overview for the specified Client.

2.1.1.2.5 Description is system generated based on the specific Tickler requirements.

2.1.1.2.6 Ticklers can be marked as “Read” by users with the security rights to update ticklers. See also Security and Help and Training sections.

2.1.1.2.7 Ticklers can be deleted by users with security rights to update ticklers. See also Security and Help and Training sections.

2.1.1.2.8 The Tickler list can be sorted by column heading except the “Read” and

"Delete" columns.

2.1.1.2.9 A Tickler item expires 60 days after it was generated and is removed from the list. Expiration Date = Generated Date + 60.

2.1.1.3 Screen Data Elements

Name	Values
2.1.1.3.1 Client Name	Display only: Last Name, First Name
2.1.1.3.2 Tickler Name	Display only: Tickler Name
2.1.1.3.3 Description	Display only: From Generated Text defined for the specific Tickler. E.g. for Next ISP in 60 Days the generated text = "ISP Due on MM/DD/YY, Multiple Auths = Y"
2.1.1.3.4 Generated Date	Display only: MM/DD/YYYY date the tickler was generated
2.1.1.3.5 Read	User-checked Checkbox.
2.1.1.3.6 Delete	User-selected Delete indicator.

2.1.1.4 Minimum Required Data Elements

2.1.1.4.1 None.

2.1.1.5 Security

2.1.1.5.1 Workers with update rights to Client data also have update/delete rights to Ticklers.

2.1.1.6 Help Screen and Training Content

2.1.1.6.1 Only the Read and Delete fields can be updated by users with the security rights.

2.1.1.6.2 To Mark a tickler as Read or to Delete a tickler the user must mark the appropriate field and Save the tickler.

2.1.1.6.3 A Tickler marked deleted and saved is removed from the tickler list.

2.1.1.6.4 A Tickler will automatically be removed from the list when Tickler Run Date – Generated Date >= 60 days.

2.1.2 AWA County Web Ticklers

2.1.2.1 Tickler Business Requirements

Tickler Name	Criteria	Notify	Frequency	Generated Text
Next ISP Due in 60 Days	• Clients in County (Both County of Residence and County of Service) who have an open (Status = Open) CSA excluding CSAs for CDS • AND CSA To Date >= Tickler Run Date • AND Tickler Run Date + 60 days >= Current Assessment Next ISP Date	County	Daily	Tickler Description = ISP Due on ***<Next ISP Date formatted MM/DD/YYYY>***, Multiple Auths ***<Yes or No>*** Multiple Auths = Yes if Client has more than one open CSA (excluding CDS) else the value = No.

2.2 Client Tab

2.2.1 Overview Screen

2.2.1.1 Description

Add Next ISP Date to Plan/Program section. This date is important in planning and review of Client services and upcoming Referrals/Authorizations. This field is used to generate the Work List – Next ISP Due in 60 Days.

Add Overall Employment Support Level to Plan/Program section. The Acuity Level will provide some information on the level of support required by the client. It is also important when determining the Planned Rate for the client.

2.2.1.2 Screen Prototype –

2.2.1.3 Business Requirements:

2.2.1.3.1 Display Next ISP Date from Current Assessment. Display this in line with Last Assessment Date and Last ISP Date. If no Current Assessment exists for the client display blank.

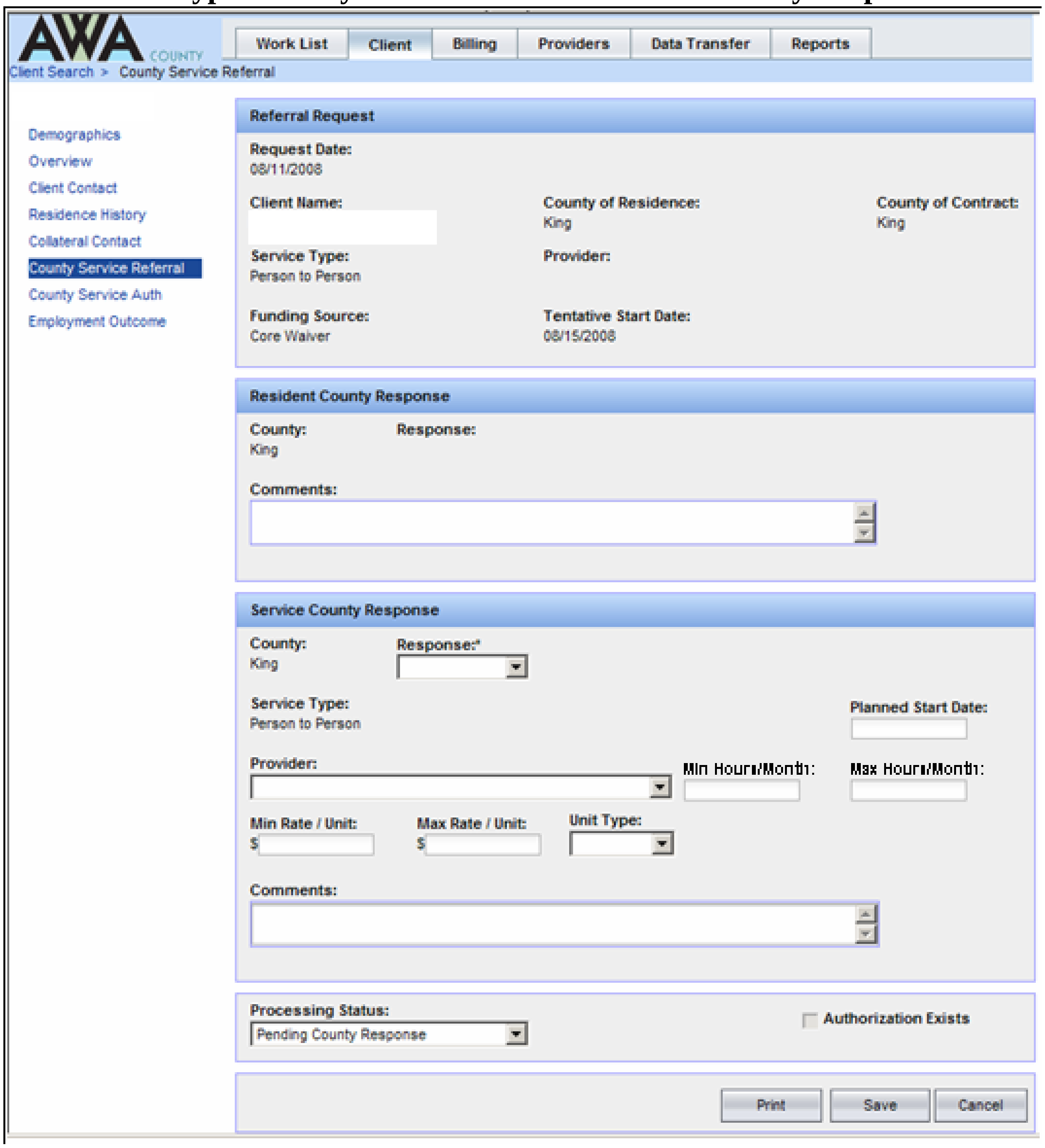
2.2.1.3.2 Display Overall Employment Support Level from the CARE Finalize Plan screen Service Details for the County Service from the client's Current Assessment. If no Current Assessment exists for the client display blank

2.2.1.4 Data Elements

Name	Values
2.2.1.4.1 Next ISP Date	Display only From Current Assessment ISP Summary Screen
2.2.1.4.2 Overall Employment Support Level	Display only Blank if no Current Assessment From Current Assessment/ISP/Finalize Plan screen/Service Details Classification/Level for County Employment Services.

2.2.2 Client Tab / County Service Referral

2.2.2.1 Prototype: County Service Referral / Service County Response section



2.2.2.2 Business Requirements

2.2.2.2.1 Change label Min Units/Month to **Min Hrs./Month**

2.2.2.2.2 Change label Max Units/Month to **Max Hrs./Month**

2.2.2.2.3 Rearrange fields Min Rate / Unit, Max Rate / Unit and Unit Type on one line with Min Hrs./Month and Max Hrs./Month on separate line.

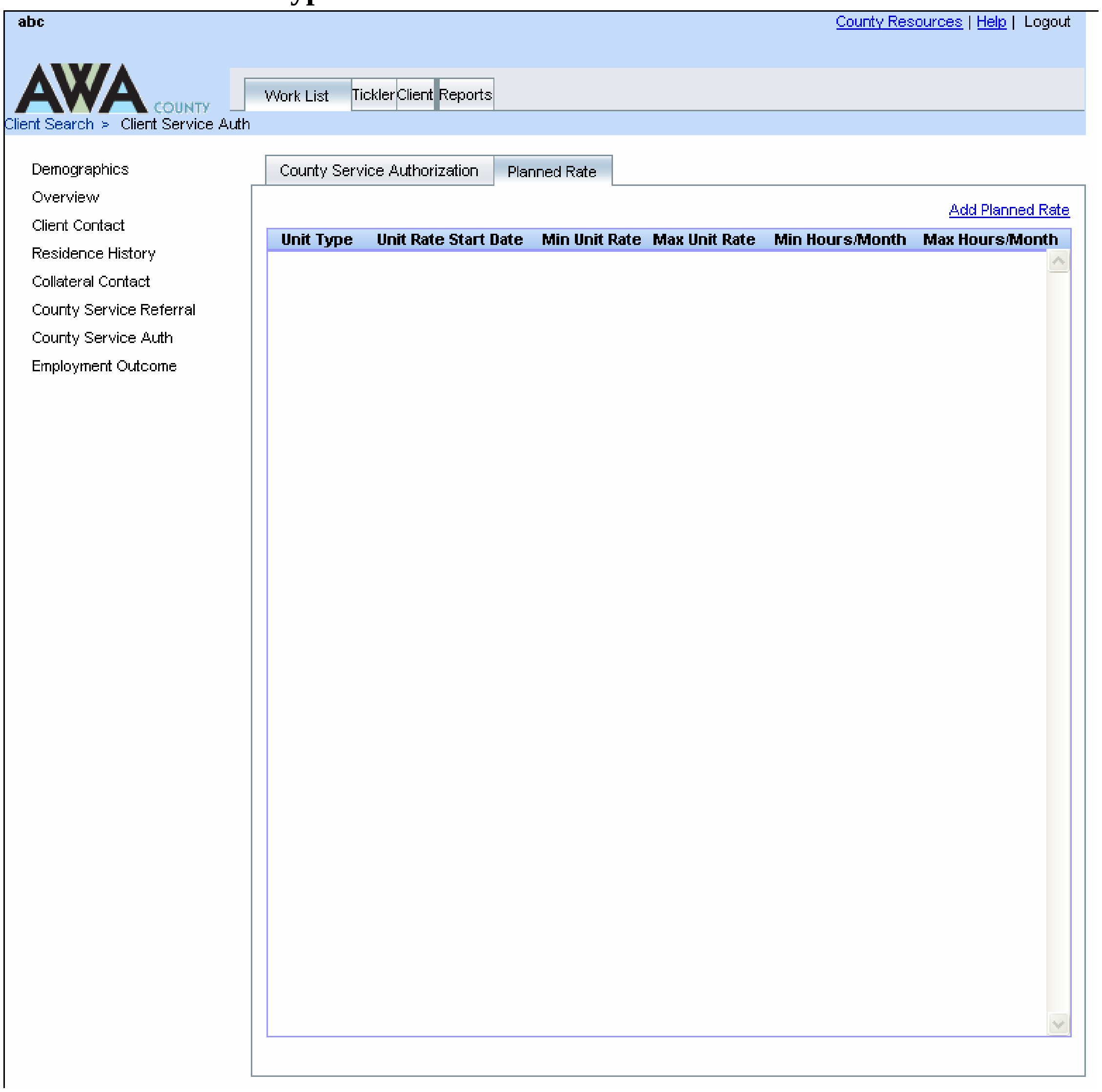
2.2.2.2.4 Delete the following Unit Type values: Contact and Project.

2.2.2.3 Data Elements

Name	Values
2.2.2.3.1 Unit Type	User-selected: Day Hour Month Delete the following values: Contact Project

2.2.3 Client Tab / County Service Auth / Planned Rate Tab

2.2.3.1 Screen Prototype – Planned Rate Tab



2.2.3.2 Business Requirements

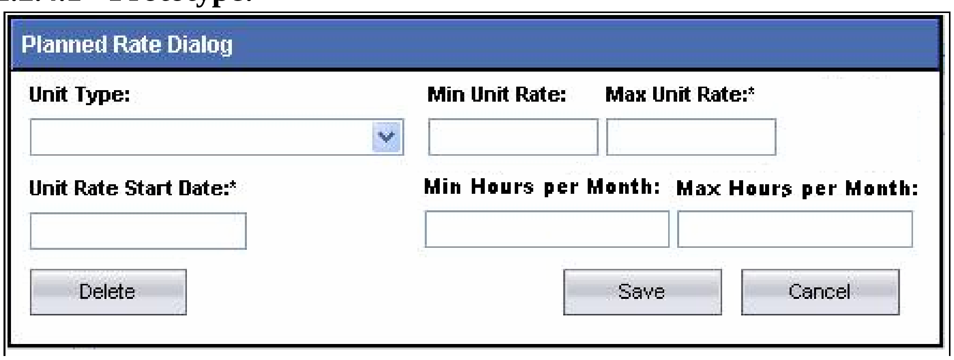
2.2.3.2.1 Realign Columns to match order in Client Tab / County Service Auth / Planned Rate Tab / Planned Rate Dialog
2.2.3.2.2 Change label Min Units/Month to **Min Hrs./Month**
2.2.3.2.3 Change label Max Units/Month to **Max Hrs./Month**

2.2.3.3 Data Elements in preferred order

Name	Values
2.2.3.3.1 Unit Type	From Planned Rate Dialog Unit Type
2.2.3.3.2 Unit Rate Start Date	From Planned Rate Dialog Start Date
2.2.3.3.3 Min Unit Rate	From Planned Rate Dialog Min Unit Rate
2.2.3.3.4 Max Unit Rate	From Planned Rate Dialog Max Unit Rate
2.2.3.3.5 Min Hrs./Month	From Planned Rate Dialog Min Number of Units/Month
2.2.3.3.6 Max Hrs./Month	From Planned Rate Dialog Max Number of Units/Month

2.2.4 Client Tab / County Service Auth / Planned Rate Tab / Planned Rate Dialog

2.2.4.1 Prototype:



2.2.4.2 Business Requirements

2.2.4.2.1 Change label Min Units/Month to **Min Hrs./Month**
2.2.4.2.2 Change label Max Units/Month to **Max Hrs./Month**
2.2.4.2.3 Rearrange fields Min Rate / Unit, Max Rate / Unit and Unit Type on one line with Min Hrs./Month and Max Hrs./Month on separate line.
2.2.4.2.4 Delete the following Unit Type values: Contact and Project.

2.2.4.3 Data Elements

Name	Values
2.2.4.3.1 Unit Type	User-selected: Day Hour Month Delete the following values: Contact Project

2.3 Interfaces

2.3.1 County Web Billing Interface

Table 1. County Billing Data Elements by Service Type at a glance

Description	Comments	ADC	CA	GSE	IE	PTP	SI	CDS
County Identifiers								
County ID - Residence	System Value	X	X	X	X	X	X	X
County ID - Provider	System Value	X	X	X	X	X	X	X
Client Identifiers								
ADSA Client ID	Systematical Assigned Number	X	X	X	X	X	X	X
Client First Name	System supplied	X	X	X	X	X	X	X
Client MI	System supplied	X	X	X	X	X	X	X
Client Last Name	System supplied	X	X	X	X	X	X	X
Provider Identifiers								
Provider Number	System Value	X	X	X	X	X	X	X
Provider Name	System supplied	X	X	X	X	X	X	X
Service Information								
Authorization Number	System Value	X	X	X	X	X	X	X
Service Code	System Value	X	X	X	X	X	X	X
Service From Date	System supplied	X	X	X	X	X	X	X
Service Year Month	System supplied	X	X	X	X	X	X	X
Service To Date	System supplied	X	X	X	X	X	X	X
Projected End Date	System calculated							X
Billing Information								
Billing Month and Year	System Determined	X	X	X	X	X	X	X
Fund Source	System supplied	X	X	X	X	X	X	X
Unit Type	System supplied from authorization	X	X	X	X	X	X	X
Number of Units		X	X	X	X	X	X	
Unit Rate	Dollar Amount	X	X	X	X	X	X	
Natural Number of Units								X
Natural Unit Rate	Dollar Amount							X
Other Number of Units								X
Other Unit Rate	Dollar Amount							X
Additional Expense	Dollar Amount							X
Results Information								
Provider Staff Hrs		X	X		X	X		
Job Prep					X	X		
Job Development					X	X		
Job Coaching					X	X		
Record Keeping					X	X		
Client Hours Paid				X	X	X	X	
Client Pathway Hours Volunteer				X	X	X	X	
Client Pathway Hours Other				X	X	X	X	
Client Hours Volunteer			X					

Description	Comments	ADC	CA	GSE	IE	PTP	SI	CDS
Client Hours Other			X					
Gross Wages	For Service Month			X	X	X	X	
Age In Months	Calculated by the System							X
Personal Agent Hours						X		
Personal Agent Cost	Dollar Amount					X		
Site Hours	Hours			X			X	

ADC Adult Day Care
CA Community Access
GSE Group Supported Employment
IE Individual Employment
PTP Person to Person
SI Pre Voc Employment/Sheltered Industries
CDS Child Development

2.3.2 County Billing Data Requirements

2.3.2.1 Add Site Hours to Group Supported Employment and Pre-Voc Employment/Sheltered Industries. This column is required when interfacing these services.

2.3.2.2 Site Hours is an optional field.

2.3.2.3 If a value is entered for Site Hours it must be numeric with up to 8 digits and 2 decimals.

2.3.3 County Billing Data Record Layouts

2.3.3.1 Group Supported Employment Billing Record Data Elements

Column Name	Required on Input	Column Datatype	Data Definition/Input Rules
Authorization Number	✓	Char(7)	Enter the Referral Number from the CSA DDD authorized the service.
Service Year Month	✓	Char(6)	6 characters. The year and month (YYYYMM) for which services are being reported.
Service Code	✓	Varchar	1 to 5 characters – value 'GSE'.
Provider Name			1 to 60 characters. Enter your agency's name.
Provider Number	✓	Char(7)	Enter the Provider Number, which has been assigned to your agency by CARE.
Client Last Name	✓	Varchar(30)	1 to 30 characters. Client authorized for GSE services by the case manager on the County Services Authorization (CSA).
Client First Name	✓	Varchar(30)	1 to 30 characters.
Client MI		Char	1 character. Pre-filled in Output.

Column Name	Required on Input	Column Datatype	Data Definition/Input Rules
ADSAClient Id	✓	Char(6)	The ADSA Client ID from the CSA.
Fund Source	✓	VarChar(5)	1 to 5 characters. Enter the Funding Source code from the CSA.
Service From Date			The date (YYYY/MM/DD) from the CSA DDD authorized the service.
Service To Date			The date (YYYY/MM/DD) from the CSA DDD authorized the service.
–Residence County ID			The number (1-39) of the county in which the client resides
Provider County ID	✓		The number (1-39) of the county in which your agency provided this service
Unit Type	✓	Char	1 character. The unit of service defined in the County Program Agreement**:** • **C** for contact • **H** for hour • **D** for day • **M** for month • **P** for project.
Number of Units	✓	Numeric(8,2)	Enter total number of service units received by the client. The "Number of Units" should be consistent with the "Unit Type". A number 999999.99
Unit Rate	✓	Numeric(8,2)	Enter the rate paid for each service as authorized by the county. A number 999999.99
Site Hours		Numeric(8,2)	Optional Field
Client Hours Paid		Numeric(8,2)	Enter the total number of hours the client spent in paid community employment (including paid hours for vacation, sick or holiday) during the service month. A number 999999.99

Column Name	Required on Input	Column Datatype	Data Definition/Input Rules
Client Pathway Hours Volunteer		Numeric(8,2)	Enter the total number of hours the client spent in Volunteer activity during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. A number 999999.99
Client Pathway Hours Other		Numeric(8,2)	Enter the total number of hours the client spent in Other activities during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. Do not include lunchtime. A number 999999.99
Gross Wages		Numeric(8,2)	Enter the total earnings of the client during the reporting month. This should include all wages, any paid holiday or sick leave. A number 999999.99
Input Error		Varchar(100)	Used by the application.

2.3.3.2 Pre-Voc Employment Billing Record Data Elements

Column Name	Required on Input	Column Datatype	Data Definition/Input Rules
Authorization Number	✓	Char(7)	Enter the Referral Number from the CSA DDD authorized the service.
Service Year Month	✓	Char(6)	6 characters. The year and month (YYYYMM) for which services are being reported.
Service Code	✓	Varchar	1 to 5 characters – value 'SI'.
Provider Name			1 to 60 characters. Enter your agency's name.
Provider Number	✓	Char(7)	Enter the Provider Number, which has been assigned to your agency by CARE.
Client Last Name	✓	Varchar(30)	1 to 20 characters. Client authorized for PTP services by the case manager on the County Services Authorization (CSA).
Client First Name	✓	Varchar(30)	1 to 20 characters.
Client MI		Char	1 character.

Column Name	Required on Input	Column Datatype	Data Definition/Input Rules
ADSA Client Id	✓	Char(6)	The ADSA Client ID from the CSA.
Fund Source	✓	VarChar(5)	1 to 5 characters. Enter the Funding Source code from the CSA.
Service From Date			The date (YYYY/MM/DD) from the CSA DDD authorized the service.
Service To Date			The date (YYYY/MM/DD) from the CSA DDD authorized the service.
Residence County ID			The number (1-39) of the county in which the client resides
Provider County ID	✓		The number (1-39) of the county in which your agency provided this service
Unit Type	✓	Char	1 character. The unit of service defined in the County Program Agreement**:** • **C** for contact • **H** for hour • **D** for day • **M** for month • **P** for project.
Number of Units	✓	Numeric(8,2)	Enter total number of service units received by the client. The "Number of Units" should be consistent with the "Unit Type". A number 999999.99
Unit Rate	✓	Numeric(8,2)	Enter the rate paid for each service as authorized by the county. A number 999999.99
Site Hours		Numeric(8,2)	Optional Field
Client Hours Paid		Numeric(8,2)	Enter the total number of hours the client spent in paid production (including paid hours for vacation, sick or holiday) during the service month. A number 999999.99

Column Name	Required on Input	Column Datatype	Data Definition/Input Rules
Client Pathway Hours Volunteer		Numeric(8,2)	Enter the total number of hours the client spent in Volunteer activity during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. A number 999999.99
Client Pathway Hours Other		Numeric(8,2)	Enter the total number of hours the client spent in Other activities during the service month in non-segregated community activities designed to build skills and broaden awareness of job opportunities. Do not include lunchtime. A number 999999.99
Gross Wages		Numeric(8,2)	Enter the total earnings of the client during the reporting month. This should include all wages, any paid holiday or sick leave. A number 999999.99
Input Error		Varchar(100)	Used by the application.