



FEI Systems

Connecting Every Dimension of
Health and Human Services

FASAMS Requirements Document

WI 316500 Create Archive Records Solution in FASAMS

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Dated: 7/19/2023

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GENERAL

VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
7/19/2023	1.0	Charlene Pitt	Initial Document Creation
7/26/2023	1.1		Updates
8/2/2023	1.2		Changes to update Daily Report Solution

STAKEHOLDERS

Role	Name
FEI Implementation Manager	Jesse Lindsey
FEI Account Manager	Anne Clements
FEI Business Analyst	Charlene Pitt
DCF OITS Project Director	Nathan McPherson
DCF SAMH Project Sponsor	Richard Power
DCF Business Analysts	Victor Gaines

SUPPORTING DOCUMENTS AND REFERENCES

TERMS AND DEFINITIONS

Terms	Description

SCOPE

INITIAL REQUEST & ASSUMPTIONS

Business Statement

DCF requires the ability to archive records from all staging tables that have an EntityCreatedTimestamp greater than one year old. All staging records will be moved to a new Archive Database named FASAMS.Archive. Records moved to this new archive database will be accessible via SSMS. A recurring process will be set up to move all staging records older than one year old to the new archive database. Submission Counts Tab on Daily Report should continue to provide the data expected after this Archiving solution.

Scope Definition

FEI will create two new archive databases, one for UAT and one for Production, named Bird.Portal.Database.FASAMS.UAT.Archive and Bird.Portal.Database.FASAMS.Archive respectively. FEI will archive all staging records with an EntityCreatedTimestamp greater than one year by moving them to the archive databases. FEI will create a recurring process to move all staging records greater than one year old to the new archive databases. FEI

will create a table called SubmissionModule.DailySubmissionCount to populate with the daily submission counts to support the Daily Report. The Daily Report Submission Count tab query logic will be updated to use the new table.

Assumptions, Constraints, Dependencies

- FASAMS users, who have the SSMS All Access Role, will be able to query the archived records via SSMS query
- Any future update to the database solution could potentially change the way records are archived.
- FEI expects that the Global Lock out will need to be utilized for the initial archiving of data to the new databases.

EXISTING FUNCTIONALITY

Currently, there is no archiving solution in FASAMS which has grown the staging tables to a size that has decreased system performance. This slowness affects the Daily Report, MCI Interface and Failed Records reports.

PROPOSED FUNCTIONALITY

FASAMS will archive all staging records with an EntityCreatedTimestamp greater than one year old. All staging records will be moved to the new archive database for all staging tables. A recurring process will be created to move all staging records, greater than one year old, to the new archive databases on a monthly cadance.

INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	TFS Item #(s)	Description	Estimate/ Quote
7/19/2023	316500	Initial Estimate	181-375
		Final Estimate	Final Estimate: Analysis - 32 Dev – 110 Test - 100 Acct / Project Management - 10 Total - 252

REQUIREMENTS

NOTES TO DEVELOPER

1. CREATE NEW ARCHIVE DATABASE

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	Create new UAT Archive Database <ul style="list-style-type: none"> • Name: Fasams.UAT.Inforbridge.Database Archive <ul style="list-style-type: none"> ○ <i>Name may change based on developer recommendation</i> 		<input type="checkbox"/>	<input type="checkbox"/>

Req. ID	Requirement	Ref. ID	Dev	QA
	<p>Tables:</p> <ul style="list-style-type: none"> • StagingModule.EvaluationStaging • StagingModule.ClientDemographicStaging • StagingModule.SubstanceUseDisordersStaging • StagingModule.BedCapacityBedTypeStaging • StagingModule.BedCapacityStaging • StagingModule.ContractOutputMeasureStaging • StagingModule.BedUtilizationStaging • StagingModule.SubcontractOCAStaging • StagingModule.PayorClassBedOccupancyStaging • StagingModule.ServiceEventHcpcsProcedureModifierStaging • StagingModule.ProviderSitePhoneStaging • StagingModule.SubcontractStaging • StagingModule.HealthStaging • StagingModule.SubcontractServiceStaging • StagingModule.ProviderClientPhysicalAddressStaging • StagingModule.ProviderSiteProgramAreaStaging • StagingModule.SubcontractOutcomeMeasureStaging • StagingModule.FinancialAndHouseholdStaging • DataWarehouseModule.StagingSummary • StagingModule.SubcontractOutputMeasureStaging • StagingModule.ProviderTreatmentEpisodeStaging • StagingModule.ProviderClientEmailAddressStaging • StagingModule.ImmediateDischargeStaging • StagingModule.PlacementRecordStaging • StagingModule.ProviderClientPhoneStaging • StagingModule.RecoveryStaging • StagingModule.ProviderStaging • StagingModule.DiagnosisStaging • StagingModule.MentalHealthStaging • StagingModule.DischargeStaging • StagingModule.ServiceEventExpenditureModifierStaging • StagingModule.ServiceEventStaging • StagingModule.LegalStaging • StagingModule.ProviderClientIdentifierStaging • StagingModule.WaitingListStaging • StagingModule.ProviderClientStaging • StagingModule.ProviderSiteCoveredServiceStaging • StagingModule.ProviderSitePhysicalAddressStaging • StagingModule.ServiceEventCoveredServiceModifierStaging • StagingModule.EducationAndEmploymentStaging 			

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> • StagingModule.ProviderSiteStaging • StagingModule.ProviderSiteLicenseIdentifierStaging • StagingModule.StabilityOfHousingStaging • StagingModule.ContractTargetStaging • StagingModule.PerformanceOutcomeMeasureStaging • StagingModule.MedicationStaging • StagingModule.AdmissionStaging • StagingModule.ContractOutcomeMeasureStaging 			
1.1	<p>Create new PRD Archive Database</p> <ul style="list-style-type: none"> • Name: FASAMS.Prd.Infobridge.Database.Archive <ul style="list-style-type: none"> ○ <i>Name may change based on developer recommendation</i> <p>Tables:</p> <ul style="list-style-type: none"> • StagingModule.ClientDemographicStaging • StagingModule.EvaluationStaging • StagingModule.SubstanceUseDisordersStaging • StagingModule.BedCapacityBedTypeStaging • StagingModule.BedCapacityStaging • StagingModule.ContractOutputMeasureStaging • StagingModule.BedUtilizationStaging • StagingModule.SubcontractOCAStaging • StagingModule.PayorClassBedOccupancyStaging • StagingModule.ServiceEventHcpcsProcedureModifierStaging • StagingModule.ProviderSitePhoneStaging • StagingModule.SubcontractStaging • StagingModule.HealthStaging • StagingModule.SubcontractServiceStaging • StagingModule.ProviderClientPhysicalAddressStaging • StagingModule.ProviderSiteProgramAreaStaging • StagingModule.SubcontractOutcomeMeasureStaging • StagingModule.FinancialAndHouseholdStaging • DataWarehouseModule.StagingSummary • StagingModule.SubcontractOutputMeasureStaging • StagingModule.ProviderTreatmentEpisodeStaging • StagingModule.ProviderClientEmailAddressStaging • StagingModule.ImmediateDischargeStaging • StagingModule.PlacementRecordStaging • StagingModule.ProviderClientPhoneStaging • StagingModule.RecoveryStaging • StagingModule.ProviderStaging 		<input type="checkbox"/>	<input type="checkbox"/>

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> StagingModule.DiagnosisStaging StagingModule.MentalHealthStaging StagingModule.DischargeStaging StagingModule.ServiceEventExpenditureModifierStaging StagingModule.ServiceEventStaging StagingModule.LegalStaging StagingModule.ProviderClientIdentifierStaging StagingModule.WaitingListStaging StagingModule.ProviderClientStaging StagingModule.ProviderSiteCoveredServiceStaging StagingModule.ProviderSitePhysicalAddressStaging StagingModule.ServiceEventCoveredServiceModifierStaging StagingModule.EducationAndEmploymentStaging StagingModule.ProviderSiteStaging StagingModule.ProviderSiteLicenseIdentifierStaging StagingModule.StabilityOfHousingStaging StagingModule.ContractTargetStaging StagingModule.PerformanceOutcomeMeasureStaging StagingModule.MedicationStaging StagingModule.AdmissionStaging StagingModule.ContractOutcomeMeasureStaging 			
1.2	Identify and add Indexes to Archive Database tables for high performance			

2. MOVE ALL STAGING RECORDS TO ARCHIVE GREATER THAN ONE YEAR OLD

Req. ID	Requirement	Ref. ID	Dev	QA
2.0	Create a post deployment script that moves all staging tables records, older than one year, from the ODS database staging tables (List of tables in 1.0 and 1.1) to the archive database tables.		<input type="checkbox"/>	<input type="checkbox"/>

3. SET UP RECURRING PROCESS TO MOVE ARCHIVE RECORDS OVER 1 YEAR OLD

Req. ID	Requirement	Ref. ID	Dev	QA
3.0	Create recurring process to move all staging records older 1 year from ODS Databases (UAT/Prod) to the new Archive databases on a monthly cycle.		<input type="checkbox"/>	<input type="checkbox"/>

4. SET UP SYNONYMS TO ACCESS ARCHIVE DATABASE

Req. ID	Requirement	Ref. ID	Dev	QA
4.0	Create synonyms to access Archive database staging tables: <ul style="list-style-type: none"> One synonym will be created per table 		<input type="checkbox"/>	<input type="checkbox"/>

5. USER PERMISSIONS FOR ARCHIVING TABLES UNDER ADMINISTRATION TAB

Req. ID	Requirement	Ref. ID	Dev	QA
5.0	Configure "SSMS All Access" permission as follows: <ul style="list-style-type: none"> • If user has 'SSMS All Access' permission, then user shall be able to query archive information. • If user <i>does not</i> have 'SSMS All Access' permission, then shall not be able to query archive database 		<input type="checkbox"/>	<input type="checkbox"/>

6. UPDATE STEPS TO POPULATE SUBMISSION COUNTS ON DAILY REPORT

Req. ID	Requirement	Ref. ID	Dev	QA
6.0	Create solution to update steps to populate Submission Counts on Daily Report		<input type="checkbox"/>	<input type="checkbox"/>
6.1	Create new table called " DataWarehouseModule.StagingSummaryCalculatedByDay " <ul style="list-style-type: none"> • Columns: <ul style="list-style-type: none"> ○ DataSetName ○ SubmissionDate ○ Submitted RecordCount ○ EntityCreatedTimestamp ○ EntityUpdatedTimestamp 		<input type="checkbox"/>	<input type="checkbox"/>
6.2	Create a new nightly process that calculates submitted records for the previous day and populates all columns in the DataWarehouseModule.StagingSummaryCalculatedByDay table			
6.3	Update Daily Report Submission Count tab query to pull historical weekly records from the DataWarehouseModule.StagingSummaryCalculatedByDay table			

7. TESTING

Req. ID	Requirement	Ref. ID	Dev	QA
7.0	Verify via SSMS query that all Staging Records older than 1 year are moved to new Archive databases (QC/UAT/PRD).		<input type="checkbox"/>	<input type="checkbox"/>
7.1	Verify via SSMS query that all database staging tables, not Archive tables, only display records less than a year old (QC/UAT/PRD)			
7.2	Verify the numbers are correct on the submission counts tab based on numbers from the DataWarehouseModule.StagingSummary Table		<input type="checkbox"/>	
7.3	Verify script is in place to move all records 1 year and older to Archive database <ul style="list-style-type: none"> • Script scheduled to run daily 			
7.4	Verify new table " DataWarehouseModule.StagingSummaryCalculatedByDay " has been created and the following columns display: <ul style="list-style-type: none"> ○ DataSetName ○ SubmissionDate ○ Submitted RecordCount ○ EntityCreatedTimestamp ○ EntityUpdatedTimestamp <p>Note: Data populated DataWarehouseModule.StagingSummary</p>			
7.5	Verify Daily Report Submission Count pull historical weekly records from the DataWarehouseModule.StagingSummaryCalculatedByDay table			
7.6	Verify "SSMS All Access" permission to archiving database: <ul style="list-style-type: none"> • If user has 'SSMS All Access' permission, then user shall be able to query archive information. • If user does not have 'SSMS All Access' permission, then shall not be able to query archive database 			

ARE PAMPHLET UPDATE REQUIRED? YES **NO**

Update ID	Pamphlet Chapter/Sections requiring change	Completed by FEI	Approved by DCF
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
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