



FEI Systems

Connecting Every Dimension of
Health and Human Services

FASAMS Requirements Document

Create Placement Record Exception report WI 14710

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GENERAL

VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
6/9/2020	1.0	Jesse Lindsey	Initial document creation
6/10/2020	1.1	Jesse Lindsey	Update document and added final estimate
6/23/2020	1.2	Jesse Lindsey	Update document with input from managing entities
7/2/2020	1.3	Jesse Lindsey	Update doc based on discussion with DCF

STAKEHOLDERS

Role	Name
FEI Implementation Manager	Jesse Lindsey
FEI Account Manager	Kory Schnoor
FEI Product Manager	Jessica Knott
DCF OITS Project Director	Nathan McPherson
DCF SAMH Project Sponsor	Jonathan Hall
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SUPPORTING DOCUMENTS AND REFERENCES

TERMS AND DEFINITIONS

Terms	Description

SCOPE

INITIAL REQUEST & ASSUMPTIONS

Business Statement

DCF and Managing Entities need a way to identify when a placement record has not had a service event submitted against it based on a specified amount of time. A new report will be created to assist in the identification of placement records with no recent service event submissions.

Scope Definition

A new report will be created that shows Placement Records that have not had a Service Event submitted against them based on a defined number of days. The report will be available to end users via permissions.

EXISTING FUNCTIONALITY

Currently there is no report to identify when Placement Records have not had Service Events submitted against them based on a specific number of days.

PROPOSED FUNCTIONALITY

FASAMS users will be able to run a report based on 'Submitting Entity', 'Provider', 'Placement Code Type', or 'Number of Days' parameter that shows Placement Records that have not had a Service Event in the specified span of time. The report will be exportable.

INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	Item(s)	Description	Estimate/ Quote
6/11/2020	14710	Initial Estimate	90 - 180
6/11/2020	14710	Final Estimate	Final Estimate: Analysis = 24 Dev = 96 Test = 82 Acct / Project Management = 8 Total = 210

REQUIREMENTS

1. CREATE PLACEMENT RECORD EXCEPTION REPORT

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	Create "Placement Record Exception" report that will run off ODS tables <ul style="list-style-type: none"> This table should be able to return data in real time 		<input type="checkbox"/>	<input type="checkbox"/>
1.1	Access: <ul style="list-style-type: none"> The report should be available in the Job Submission performance folder under the Report tab. Users whose role includes the <i>"View Job Submission Performance Reports"</i> permission should see this report 		<input type="checkbox"/>	<input type="checkbox"/>
1.2	Report search criteria: <ul style="list-style-type: none"> Search criteria will display under the report name once report is run 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.1	<ul style="list-style-type: none"> "Submitting Entity" – single-selection Dropdown <ul style="list-style-type: none"> Required Should populate all Submitting Entities that the current user is associated with Should return only Placement Records that were submitted by the selected Submitting Entities 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.2	<ul style="list-style-type: none"> "Provider" – multi-selection Dropdown <ul style="list-style-type: none"> Required Should populate all Providers that are associated with selected Submitting Entity Should contain a "Select All" option which will select all Providers <ul style="list-style-type: none"> "Select All" should be selected by default Should return only clients who were submitted by the selected Submitting Entities 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.3	<ul style="list-style-type: none"> "Placement Code type" dropdown <ul style="list-style-type: none"> Required Should populate all PlacementCodes that are currently in the FASAMS vocabulary Should contain a "Select All" option which will select all PlacementCodes <ul style="list-style-type: none"> "Select All" should be selected by default. 			
1.2.4	<ul style="list-style-type: none"> "Number of Days w/o Service Event submitted against Placement Record" Dropdown <ul style="list-style-type: none"> Optional 		<input type="checkbox"/>	<input type="checkbox"/>

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> ○ Dropdown selection options: 'Null', 1, 10, 15, 30, 90, 180, 270, 365 <ul style="list-style-type: none"> ▪ If the 'Null' option is selected then the report will return all Placement Records that satisfy the other selection criteria ▪ If a Placement Record has no Service Events submitted against it, then the report will only pull Placement Records whose StartDate is older than the 'Number of Days w/o Service Event submitted against Placement Record' selected 			
1.2.5	<ul style="list-style-type: none"> ● "Client SourceRecordIdentifier" <ul style="list-style-type: none"> ○ Optional ○ String field ○ Pulls from ProviderVersion14Module.ProviderClient table ○ Should operate similar to Client Search report 			
1.2.6	<ul style="list-style-type: none"> ● "SSN" <ul style="list-style-type: none"> ○ Optional ○ String field ○ Pulls from ProviderVersion14Module.ProviderClientIdentifier table ○ Should operate similar to Client Search report 			
1.2.7	<ul style="list-style-type: none"> ● "Pseudo SSN" <ul style="list-style-type: none"> ○ Optional ○ String field ○ Pulls from ProviderVersion14Module.ProviderClientIdentifier table ○ Should operate similar to Client Search report 			
1.2.8	<ul style="list-style-type: none"> ● "Unique Client Identifier" <ul style="list-style-type: none"> ○ Optional ○ String field ○ Pulls from ProviderVersion14Module.ProviderClient table ○ Should operate similar to Client Search report 			
1.2.9	<ul style="list-style-type: none"> ● "Active Placement Record Beginning Date Range" <ul style="list-style-type: none"> ○ Should return all active Placement records \geq PlacementRecord.StartDate ○ Date picker ○ Includes a Null check box ○ Null check box is checked by default 			
1.2.10	<ul style="list-style-type: none"> ● "Active Placement Record Ending Date Range" <ul style="list-style-type: none"> ○ Should return all active Placement records \leq PlacementRecord.EndDate ○ Date picker ○ Includes a Null check box ○ Null check box is checked by default 			
1.3	The report should only return Placement Records whose Admission does not have a Discharge associated to it.			
1.3.1	<p>The report should return all Placement Record SRIs, and their associated data in the below columns (in the below order):</p> <ul style="list-style-type: none"> ● Submitting Entity ● Provider ● ProviderClientSourceRecordIdentifier ● Treatment Episode SRI ● Admission SRI ● Admission Date ● Placement Record SRI ● Placement Record Start Date 		<input type="checkbox"/>	<input type="checkbox"/>

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> • Placement Code Type • Days since last Service Event submission <ul style="list-style-type: none"> ○ This is a calculation: (current date) – (last Service Event date submitted that references the Placement Record) 			
1.4	The generated report should contain the following standard component: <ul style="list-style-type: none"> • Report Title: “Placement Record Exception” • Report Criteria – lists all criteria that the report is run on (Req. 1.2) • Report Table (Req. 1.3) • The date and time when the report was generated: “Data as if <date and time>” 		<input type="checkbox"/>	<input type="checkbox"/>