



FEI Systems

Connecting Every Dimension of  
Health and Human Services

# FASAMS Requirements Document

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## Client Search Update WI 467372

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Created by: Jesse Lindsey

Dated: 9/28/2022

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## GENERAL

### VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
9/28/2022	1.0	Jesse Lindsey	Initial document creation
10/27/2021	1.1	Renee Sessions	Update requirements
11/4/2021	1.2	Renee Sessions	Update requirements per DCF and FEI review
12/02/2021	1.3	Renee Sessions	Final update per client feedback

### STAKEHOLDERS

Role	Name
FEI Implementation Manager	Jesse Lindsey
FEI Account Manager	Kristyn O'Reilly
FEI Product Manager	Jessica Knott
DCF OITS Project Director	Nathan McPherson
DCF SAMH Project Sponsor	Richard Power
DCF Business Analysts	Gregory Nix / Victor Gaines

### SUPPORTING DOCUMENTS AND REFERENCES

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### TERMS AND DEFINITIONS

Terms	Description

## SCOPE

### INITIAL REQUEST & ASSUMPTIONS

#### *Business Statement*

DCF requires the ability to quickly determine a client's Admission and Discharge dates plus Competency Status when running the Client Search report.

#### *Scope Definition*

FEI will also add three new columns to the Client Search report including:

- 'Admission Date' populated by AdmissionDate
- 'Discharge Date' populated by DischargeDate
- 'Competency Status' populated by CompetencyStatusDisplayName

*Assumptions, Constraints, Dependencies*

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**EXISTING FUNCTIONALITY**

The existing Client Search report includes the following columns.

- 'FASAMS Version'
- 'Last Name'
- 'First Name'
- 'Middle Name'
- 'Birth Date'
- 'Gender'
- 'Provider'
- 'Federal Tax Id'
- 'SSN'
- 'Pseudo SSN'
- 'Source Record Identifier'
- 'Unique Client Identifier'

**PROPOSED FUNCTIONALITY**

Users with the ability to run the Client Search report will now be able to see the columns 'Admission Date' and 'Discharge Date,' and most recent 'Competency Status' for a client's admissions for all submitting entities associated to the user.

**INITIAL ESTIMATE/ QUOTE HISTORY**

Phase/ Quote Date	TFS Item #(s)	Description	Estimate/ Quote
10/6/2021	467372	Initial Estimate	Small
10/27/2021	467372	Final Estimate	<b>Final Estimate:</b> Analysis – 12 Dev – 16 Test – 32 Acct / Project Management – 6 <b>Total – 66</b>

# REQUIREMENTS

## NOTES TO DEVELOPER

This is an update to the existing Client Search report in FASAMS. The three new columns should display at right of the existing report fields, as shown in the following mockup. DCF expects multiple rows for the same client in the event that the client has more than one admission over time.

Client Search												A	B	C
FASAMS Version	Last Name	First Name	Middle Name	Birth Date	Gender	Provider	Federal Tax Id	SSN	Pseudo SSN	Source Record Identifier	Unique Client Identifier	Admission Date	Discharge Date	Competency Status
Version 13	ROBERTS	ROBERT		01/01/30	Male	Agency for Community Treatment Services, Inc.	59-1860626	123456789		AB315		01/01/2017	12/01/2017	The individual is not under the jurisdiction of the court and is not involved in criminal justice system
Version 13	ROBERTS	ROBERT		01/01/30	Male	Mental Health Care, Inc. d/b/a Gracepoint	59-0747306	123456789		AB135		01/01/2018	12/01/2018	Rubio
Version 13	ROBERTS	ROBERT		01/01/30	Male	Operation PAR, Inc.	59-1349234	123456789		AB124		01/01/2019	12/01/2019	Mosher
Version 13	ROBERTS	ROBERT		01/01/30	Male	PEMHS	59-3153549	123456789		AB123		01/01/2021	N/A	Unknown

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### 1. ADD COLUMNS TO CLIENT SEARCH REPORT

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	Update Client Search report in FASAMS to include new columns at right of existing columns			
1.0.1	Add the following column: <ul style="list-style-type: none"> <li>Column name: <b>'Admission Date'</b> <ul style="list-style-type: none"> <li>Populate from Admission.AdmissionDate</li> <li>If no Admission exists for the client, display as 'N/A'</li> </ul> </li> </ul>	A	<input type="checkbox"/>	<input type="checkbox"/>
1.0.2	Add the following column: <ul style="list-style-type: none"> <li>Column name: <b>'Discharge Date'</b> <ul style="list-style-type: none"> <li>Populate from Discharge.DischargeDate</li> <li>If no Discharge exists for the admission, display as 'N/A'</li> </ul> </li> </ul>	B	<input type="checkbox"/>	<input type="checkbox"/>
1.0.3	Add the following column: <ul style="list-style-type: none"> <li>Column name: <b>'Competency Status'</b> <ul style="list-style-type: none"> <li>Populate from Legal.CompetencyStatusDisplayName</li> <li>If no CompetencyStatusCode exists, display as 'N/A'</li> </ul> </li> </ul>	C	<input type="checkbox"/>	<input type="checkbox"/>