Connecting Every Dimension of
Health and Human Services

FASAMS Requirements Document

MCI Numbers for SEs WI 8376

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CONTENTS

GENERAL

VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
04/15/2019	1.0	Jesse Lindsey	Initial document creation
4/17/2019	1.1	Yiwen Ma	FEi Internal Review
4/22/2019	1.2	Jesse Lindsey	Final Estimate added

STAKEHOLDERS

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SCOPE

INITIAL REQUEST & ASSUMPTIONS

Business Statement

The submitting entities (SE) need to have the ability to view all of their clients that have received a new or updated unique client identifier (UCI) number that was received from the MCI process or clients who have not received a UCI number. The UCI numbers are used by the MEs and their providers.

Scope Definition

Create two new reports:

- The first would be pull all clients associated to a User's SE, and a user can filter the report to see Clients with UCI only or Client with no UCI only.
- The second would pull all clients associates with a user's SE whose UCI is null and who received services before based on data in FASAMS.

EXISTING FUNCTIONALITY

Currently FASAMS has the ability to search for a client's UCI number using demographic data on the Reports tab.

PROPOSED FUNCTIONALITY

FASAMS will have two new reports that do the following:

- Clients UCIs
    - Returns only clients submitted by the end user's associated submitting entity
    - Allows user to filter to see only clients with UCIs or only clients who have no UCIs

- Clients missing Unique Client Identifier with Services
  - Returns only clients submitted by the end user’s associated submitting entity who have no UCIs
  - Only client who have Service Event(s) will be returned in this report

Initial Estimate/ Quote History

Phase/ Quote Date	Item(s)	Description	Estimate/ Quote
2/20/2019	8376	Initial Estimate	Up to 90
4/22/2019	8376	Final Estimate	Development: 32 Testing: 48 Analysis: 20 Acct/Project Management: 8 Total: 108

REQUIREMENTS

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	Create “**Clients UCIs**” report		☐	☐
1.1	Access: • The report should be available in the Client folder under the Report tab. • All end users can access report		☐	☐
1.2	Report search criteria:			
1.2.1	• “Submitting Entity” – Multi-selection Dropdown ○ Required ○ Should populate all Submitting Entities that the current user is associated with ○ Should contain a “Select All” option which will select all Submitting Entities available to the current user. “Select All” should be selected by default. ○ Should return only clients who were submitted by the selected Submitting Entities		☐	☐
1.2.2	• “Has UCI” – Single-selection Dropdown ○ Required ○ Should contain these options: ▪ “Clients with UCIs” – should return only Clients who have Unique Client Identifier (UCI) ▪ “Clients without UCIs” – should return only Clients who do not have Unique Client Identifier (UCI) ▪ “All Clients” – should return all clients for the selected Submitting Entity		☐	☐
1.3	The report should return all clients, with or without UCIs (Req. 1.1.2), of the selected Submitting Entities by these columns: • Last Name • First Name • Birth Date • Gender • SSN • Pseudo SSN • Unique Client Identifier • Medicaid PIN		☐	☐

Req. ID	Requirement	Ref. ID	Dev	QA
	• Submitting Entity • Provider • Federal Tax Identifier • Source Record Identifier			
1.3.1	The report should display the clients at ProviderClient level: If a client was submitted by multiple Submitting Entities or associated to multiple Providers, s/he will be displayed with multiple rows in the report.		☐	☐
1.4	The generated report should contain the following standard component: • Report Title: “Client UCIs” • 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>”		☐	☐
2.0	Create “**Clients missing UCIs with Services**” report		☐	☐
2.1	Access: • The report should be available in the Exception folder under the Report tab. • Only roles with new permission, **DCF Admin UCI,** can access this report		☐	☐
2.1.1	Report search criteria:		☐	☐

	• “Submitting Entity” – Multi-selection Dropdown
	    ○ Required
	    ○ Should populate all Submitting Entities that the current user is associated with
	    ○ Should contain a “Select All” option which will select all Submitting Entities available to the current user. “Select All” should be selected by default.
	    ○ Should return only clients who were submitted by the selected Submitting Entities
			☐	☐

2.2	The report should return all clients that meet all following criteria • Is associated with the Submitting Entities selected; • Does NOT have Unique Client Identifier (UCI) • Has at least one Service Event associated, regardless of its Service Date.		☐	☐
2.2.1	The report should display the clients at ProviderClient level: If a client was submitted by multiple Submitting Entities or associated to multiple Providers, s/he will be displayed with multiple rows in the report.		☐	☐
2.3	The report should display the client found by these columns: • Last Name • First Name • Birthdate • Gender • SSN • Pseudo SSN • Unique Client Identifier • Medicaid PIN • Submitting Entity • Provider • Federal Tax Identifier • Source Record Identifier		☐	☐