
Future Closure

SMCR 616

1/9/2008

System Maintenance Change Request (SMCR)

AMENDMENTS

Amendment #	Description	Date
1.0	Allow SAR Cancellation for both the Future Closure along with Current and Past closures.	1/28/09
1.1		
1.2		

TABLE OF CONTENTS

- AMENDMENTS 1**
- TABLE OF CONTENTS 2**
- 1 INTRODUCTION 3**
 - 1.1 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS 3
 - 1.2 PURPOSE 4
 - 1.3 OVERVIEW 4
 - 1.4 SCOPE 4
 - 1.5 BUSINESS FLOW 5
 - 1.6 ASSUMPTIONS AND DEPENDENCIES 7

1 INTRODUCTION

1.1 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Table 1-2 lists the definitions, abbreviations and acronyms that may be used within this document:

Table 1-2, Definitions, Abbreviations and Acronyms

Term	Definition
CCS	California Children's Services
CIN	Client Index Number
CMS	Children's Medical Services
DHCS	Department of Health Care Services
HAP	Health Access Program
MEDS	Medi-Cal Eligibility Data System
SMCR	System Maintenance Change Request
NOA	Notice of Action

1.2 PURPOSE

The purpose of this SMCR is to create a process for CMS Net System to allow users to close client's cases in the future and all SARs cancelled automatically.

1.3 OVERVIEW

The CMS Net System currently does not allow for future closure dates in the Client Eligibility screen. Due to the large county caseload size and automatic processing, the CMS Net System must be modified to accommodate such processing.

1.4 SCOPE

	Business Rules
1.	Be able to set a future closure in the date closed field in client eligibility (CMSCE-10). The case will remain in active status. The future date must be on day after the current date up to 60 days in the future not to exceed the current program end date.
2.	Do not allow a user to enter in a date greater then two month from the current date or the program eligibility end date.
3.	Be able to bypass the case status field and leave it active in order to enter in a future closure date.
4.	Display error message if user bypasses the case status field to the date closed field and enters in a current or past date.
5.	Be able to enter a future date in the "Date Closed" field in client eligibility (CMSCE-10).
6.	Be able to select "Closure Reason" field in client eligibility (CMSCE-10).
7.	Be able to select "Determined by" field in client eligibility (CMSCE-10).
8.	Be able to enter "Date Determined" field in client eligibility (CMSCE-10).
9.	Allow closure regardless of status.
10.	Create a Taskman generated closure in the Background to execute. Evaluate system back ups to see when future closures can be ran.
11.	Update the "Program Eligibility End" date to be the same as the closure date unless the reason for closure for "Residential Eligibility Criteria Not Met" which translates as a county transfer. See rules below.
12.	Cancel all Authorized SARs with service end dates on all closures past, current and future. The SARs will be given a service end date effective date the closure date.
13.	Cancel all SAR's without generating a NOA or cancellation letter from the SAR system for each individual SAR.
14.	Apply "Reason for Closure" from client eligibility to all cancelled SARs.
15.	Delete all Pending SARs.
16.	Only send one NOA to Web Correspondence effective date of closure from Client Eligibility.
17.	Create System generated Case Note for executed Future Closure with a list of the cancelled SAR's.
18.	Evaluate future closure impact on removing outstanding tickler dates.
19.	Give access to County System Administrators to modify reauthorize cancelled SARs.
20.	Do no allow a future closure date to be used for closure reason "Aid Code Change" and "Death of Patient."
21.	Allow users to clear the date field only if the case is still active and the date in the field is in the future.
22.	If the date closed field is cleared then remove the reason for closure, determined by, and date determined automatically.

1.5 BUSINESS FLOW

User Security:

County System Administrator's will be given the ability to modify cancelled SARs. (BR#20)

Client Eligibility:

If the client's case is active, the user will be able to bypass the active case status field and go directly to the date closed field (BR#2) to enter a date at least one day after the current date up to 60 days in the future (BR#3). The user will select a reason for closure (BR#7), determined by (BR#8), and the date determined (BR#9) in "Client Eligibility (CMSCE-10)" screen to set the "Future Closure."

The process for manually closing a case with the date either being current or in the past will not change. The user must change the case status field to closed. However, If the user bypasses the case status field to enter in a current or past date in the date closed field the system will give the following error:

- CURRENT OR PAST DATE ARE NOT ALLOW UNLESS THE CASE STATUS FIELD IS CHANGED TO CLOSED (BR#5).

Error Messages:

If reason for closure is Aid Code Change, the following error message shall display:

- FUTURE CLOSURE IS NOT ALLOWED FOR "AID CODE CLOSURES" (BR#21)

If reason for closure is Death of Patient, the following error shall display

- FUTURE CLOSURE IS NOT ALLOWED FOR "DEATH OF PATIENT" (BR#21)

If the user tries to put in a date either greater than 60 days from current date or greater than program eligibility date, the following error shall display:

- FUTURE CLOSURE DATE OVER 2 MONTHS ARE NOT ALLOWED. (BR#2)

Program Eligibility:

Change the program eligibility end date to the closure date if the following rules apply (BR#12):

- If the closure reason is "RESIDENTIAL ELIGIBILITY IS NOT MET" do not change the end date to the date of closure.
- If the closure reason is "DEATH OF PATIENT" change the end date to the date of closure.

- If the closure reason is “CCS TREATMENT SERVICES ARE COMPLETED” change the end date to the date of closure.
- If the closure reason is “CLIENT IS OVER 21 YEAR OF AGE” change the end date to the date of closure.

Pending Eligibility:

If the system already has a future closure set up and the user goes to create a new program eligibility without removing it then display the a message warning the user that there is future closure in place.

- FUTURE CLOSURE IS SET IN CLIENT ELIGIBILITY. PLEASE REMOVE BEFORE CREATING A NEW PERIOD.

SAR Cancellation:

All Authorized and Pending SARs will be cancelled or deleted on the Date of Closure. This will be performed on closures that in are in the past, current and future.

System Closure:

1. The task man will execute the background job the a TBD time. (BR#11)
2. All Authorized SARs with end dates after the closure date will automatically be cancelled and Pending SARs with service dates after the closure will be deleted. (BR#13,16)
3. The effective date of the cancellations will be the date of closure (BR#13).
4. The closure reason will be applied to each individual SAR. (BR#15)
5. Cancel all SARs without generating a NOA for each individual SAR. (BR#14)
6. Only one NOA will be sent out for both the case closure and all cancelled SARs from client eligibility effect the date of closure. (BR#17)
7. Automatic case note will be entered with the following closure information. (BR#18)

- List of Cancelled and Deleted SARs

Future Closure Date Removal:

Users will be able to removed future closure dates to stop the process from happening in client eligibility end date (BR#22).

- Because the future closure date process will be date driven, If the client’s case has a future closure date saved, the user will be able to clear the date closed field by selecting “F7” in client eligibility.
- Once the field has been cleared automatically remove the reason for closure, determined by, and date determined.

- Having these fields cleared from client eligibility will stop the future closure and SAR cancellation from executing.

Ticklers:

Evaluate the impact of Future Closure on removing Ticklers. All dates should be removed from the ticklers once the case is closed (BR#18).

1.6 ASSUMPTIONS AND DEPENDENCIES

- 1) Processing rules for Aid Code changes currently taking place shall remain the same. The option to enter a future closure date for an Aid Code change or closure will not be allowed.
- 2) Future Closure Dates will not be greater than 60 days.
- 3) Past or Same day closures current functionality will remain the same.
- 4) The automated cancellations of SAR(s) will only be done for cases closed in the future.
- 5) Send HAP/Meds transactions with closure information on the day of closure.