

WEB FOLLOW-UP
System Requirements Specifications

Revision 9
As of 05/01/2008

System Maintenance Change Request
SMCR 936
(SMCR200705-936)

DISCLAIMER: This document is not a user manual and is being provided here as an informational courtesy for the system users as early as possible. The documentation is intended for the developers only and is subject to change at any time. The final product may change for design improvements and the final system user instructions will be posted with the manual updates.

All questions and comments should be sent via email to CMSHelp@dhcs.ca.gov.

TABLE OF CONTENTS

TABLE OF CONTENTS	ii
1 INTRODUCTION	1
1.1 PURPOSE	1
1.2 SCOPE	1
1.3 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS	2
1.4 OVERVIEW	2
2 OVERALL DESCRIPTION	3
2.1 ASSUMPTIONS AND DEPENDENCIES	3
3 FUNCTIONAL REQUIREMENTS	4
3.1 FOLLOW-UP TERMS AND DEFINITIONS	4
3.2 ACCESSING FOLLOW-UPS	5
3.3 CREATE FOLLOW-UP VIA WEB MESSAGE	8
3.4 ADD TASK	20
3.5 ASSIGNED USERS' FOLLOW-UP LIST	26
3.6 REQUESTOR FOLLOW-UP LIST	28
3.7 ADD USERS TO FOLLOW-UP	30
3.8 REMOVE USERS FROM A FOLLOW-UP	32
3.9 COMPLETE TASK	36
3.10 DELETE TASK	38
3.11 TASK MESSAGE TEMPLATE	40
3.12 SEND FOLLOW-UP OR TASK MESSAGE TO USERS	41
3.13 COMPLETE FOLLOW-UP BY REQUESTOR	44
3.14 RESTORE FOLLOW-UP	47
3.15 SEARCH OPTION FOR FOLLOW-UPS	52
3.16 ATTACHMENTS	54
3.16.1 <i>Attach Patient</i>	55
3.16.2 <i>Attach Case Notes</i>	59
3.16.3 <i>Attach SAR</i>	64
3.17 PRINT FOLLOW-UPS	70

List of Figures

Figure 3-1, CMS Net Web Homepage	5
Figure 3-2, Access Follow-ups.....	6
Figure 3-3, View List by Follow-ups	7
Figure 3-4, Select Recipients to be an Assigned or Notified User	8
Figure 3-5, Use Check Box to Display Follow-up Details	9
Figure 3-6, Create New Follow-up	10
Figure 3-7, Follow-up Message Thread	12
Figure 3-8, New Thread Message drop-down list.....	13
Figure 9, Using the Expand/Collapse Icon.....	14
Figure 3-10, Pop-up Message Screen	15
Figure 3-11, Reply to Follow-up Message	16
Figure 3-12, Reply Message added to Follow-up Message Thread	17
Figure 3-13, Follow-up message with different subject description	18
Figure 3-14, Add Task to Follow-up.....	20
Figure 3-15, Assigned User Options.....	21
Figure 3-16, Task Message Thread.....	22
Figure 3-17, Task Added with new message in Task Message Thread	23
Figure 3-18, Task Message Template	24
Figure 3-19, Follow-up with additional task items added	25
Figure 3-20, Follow-up List of an Assigned User	26
Figure 3-21, Follow-up Details for the Assigned User	27
Figure 3-22, Requestors Follow-up List	28
Figure 3-23, Requestors Follow-up Details Screen	29
Figure 3-24, Add Additional Users	30
Figure 3-25, New Assigned User Added to the Follow-up	31
Figure 26, Remove User from Follow-up	32
Figure 27, Assigned User has been removed from the Follow-up.....	33
Figure 3-28, Notify Removed User	34
Figure 3-29, Former Assigned User Confirms Removal	35
Figure 3-30, Change Task Status to Complete.....	36
Figure 3-31, Task Completed	37
Figure 3-32, Select Tasks to Delete.....	38
Figure 3-33, System Follow-up message when Task is deleted.....	39
Figure 3-34, Send Follow-up or Task Message	41
Figure 3-35, Create Follow-up Message.....	42
Figure 3-36, Follow-up Message displays on Message Thread	43
Figure 3-37, Requestor Complete the Follow-up	44
Figure 3-38, Follow-ups are marked as New after completion	45
Figure 3-39, Confirm Follow-up Completion	46
Figure 3-40, Search for Completed Follow-ups to restore	47
Figure 3-41, Search for Completed Follow-ups	48
Figure 3-42, Change Complete Status to Pending to restore Follow-up.....	49
Figure 3-43, Follow-up Search Options	52
Figure 3-44, Search Results Displayed in Pop Up Screen	53
Figure 3-45, Attachments Pop-Up Screen	54
Figure 3-46, Attach Patient	55
Figure 3-47, Select Patient to Attach	56
Figure 3-48, Current Attachment Items.....	57
Figure 3-49, Display Patient Attachment	58
Figure 3-50, Attaching Case Notes.....	59

<i>Figure 3-51, Search Case Notes to Attach</i>	<i>60</i>
<i>Figure 3-52, Select Case Notes to Attach.....</i>	<i>61</i>
<i>Figure 3-53, Case Notes as Attachments</i>	<i>62</i>
<i>Figure 3-54, Display Case Note Attachment.....</i>	<i>63</i>
<i>Figure 3-55, Attach SAR.....</i>	<i>64</i>
<i>Figure 3-56, Search SAR to Add as Attachment</i>	<i>65</i>
<i>Figure 3-57, Select SAR</i>	<i>66</i>
<i>Figure 3-58, SAR Attachments Added.....</i>	<i>67</i>
<i>Figure 3-59, View SAR Attachment</i>	<i>68</i>
<i>Figure 3-60, Print Follow-up.....</i>	<i>70</i>

DRAFT

List of Tables

<i>Table 1-1, Definitions, Abbreviations and Acronyms</i>	2
<i>Table 3-2, Follow-up Fields in Web Messages Data Dictionary</i>	71
<i>Table 3-3, Search Follow-up Screen Data Dictionary</i>	50
<i>Table 3-4, Web Message Attachments</i>	69

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1 INTRODUCTION

1.1 PURPOSE

The purpose of this SMCR is to convert the current CMS Net Legacy Follow-up module to the CMS Net Web system and integrate its features with Web Messages module.

1.2 SCOPE

The scope of this SMCR is to:

1. Access from the CMS Net Web System
2. Make this available on the Internet Explorer browser
3. Replace the current Legacy Follow-up module with the web version
4. Integrate web Follow-up with the web messages module.
5. View Follow-ups by selected search criteria
6. Provide the option to create a Follow-ups using Web Messages
7. Follow-ups can only be accessed by users involved such as the Requestor and the assigned and notified users
8. Make the current Client Information header a static table on the page. It remains in view at the top of the screen when user scrolls down
9. Create ability to include attachments of patient header, case notes, correspondence, and SAR.
10. Modify the Homepage to include a summary of the user items such as Web Messages, Follow-ups, and Pending Letters.

1.3 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

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

Table 1-1, Definitions, Abbreviations and Acronyms

Term	Definition
CCS	California Children's Services
CIN	Client Index Number - a unique patient identifier assigned by CMS Net
CMS Net	Children's Medical Services Network
DHCS	Department of Health Care Services
SAR	Service Authorization Request
SMCR	System Maintenance Change Request
MTU	Medical Therapy Unit
MEDS	Medi-Cal Eligibility Data System

1.4 OVERVIEW

The Follow-up module needs to be converted to the CMS Net Web system and utilize the Web Messages module to create Follow-ups. This module allows Requestors to track actions items *assigned* to users while being able to notify other users.

2 OVERALL DESCRIPTION

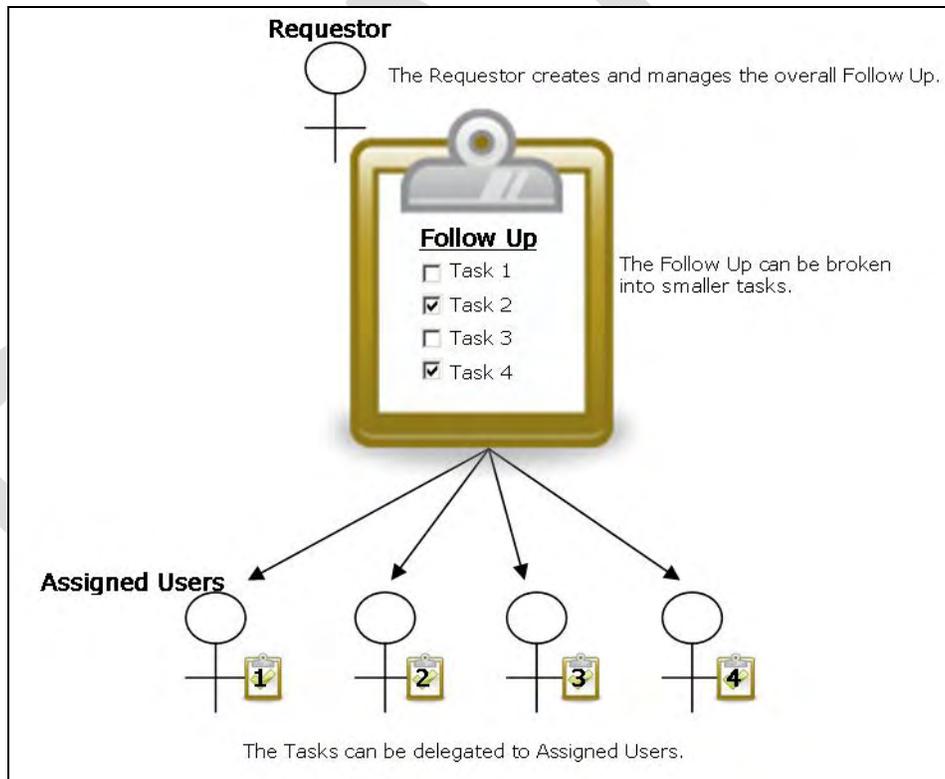
2.1 ASSUMPTIONS AND DEPENDENCIES

1. This SCMR uses the DHCS web design standards
2. This has the same “look and feel” of the SAR system
3. Create the option to print from the web
4. Save the existing or most recent patient identification until the session has expired or when the user chooses a different patient to work on. This allows the user to navigate through different modules or menus without having to perform a new search for that same patient. This feature should be similar to CMS Net Legacy.
5. The terms ‘Client’ and ‘Patient’ are used synonymously for this SMCR.
6. The Client Information Header used in this documentation is not accompanied by a data dictionary because it has already been developed and properties have been defined.
7. The requirements and design are meant for CCS, although it may serve the same requirements for GHPP.
8. Convert any pending Legacy Follow-ups to the web version
9. Add the ability to attach patient, case notes, correspondence, and SAR to the Web Messages.
10. Add the capability to use the Internet Explorer ‘Back’ and ‘Forward’ button

3 FUNCTIONAL REQUIREMENTS

3.1 FOLLOW-UP TERMS AND DEFINITIONS

1. **Follow-up** – An action item or project. Follow-ups are overseen by the Requestor.
2. **Requestor** – A person who creates a follow-up to be completed. This person is responsible (or through a surrogate) for managing the Follow-up. This person can divide the follow-up into smaller tasks and delegate them to other users (Assigned Users).
3. **Assigned User** – A person who has been assigned one or more tasks by the Requestor.
4. **Task** –Subdivision of a follow-up assigned by the Requestor to an Assigned User.
6. **Notified User** – A person notified of the follow-up. Specific action is not required from this person; however, he/she may participate in certain communications regarding the follow-up and monitor its progress.



3.2 ACCESSING FOLLOW-UPS

The CMS Net Web Homepage displays the status of the user's Web Messages, Follow-ups, and Pending Approval Letters as shown in Figure 3-1. The Pending Approval status is not in this SMCR, but will be added in the future. The name of each module is displayed as a hyperlink that links to the respective module with numbers in parentheses indicating the number of new, pending or updated items.

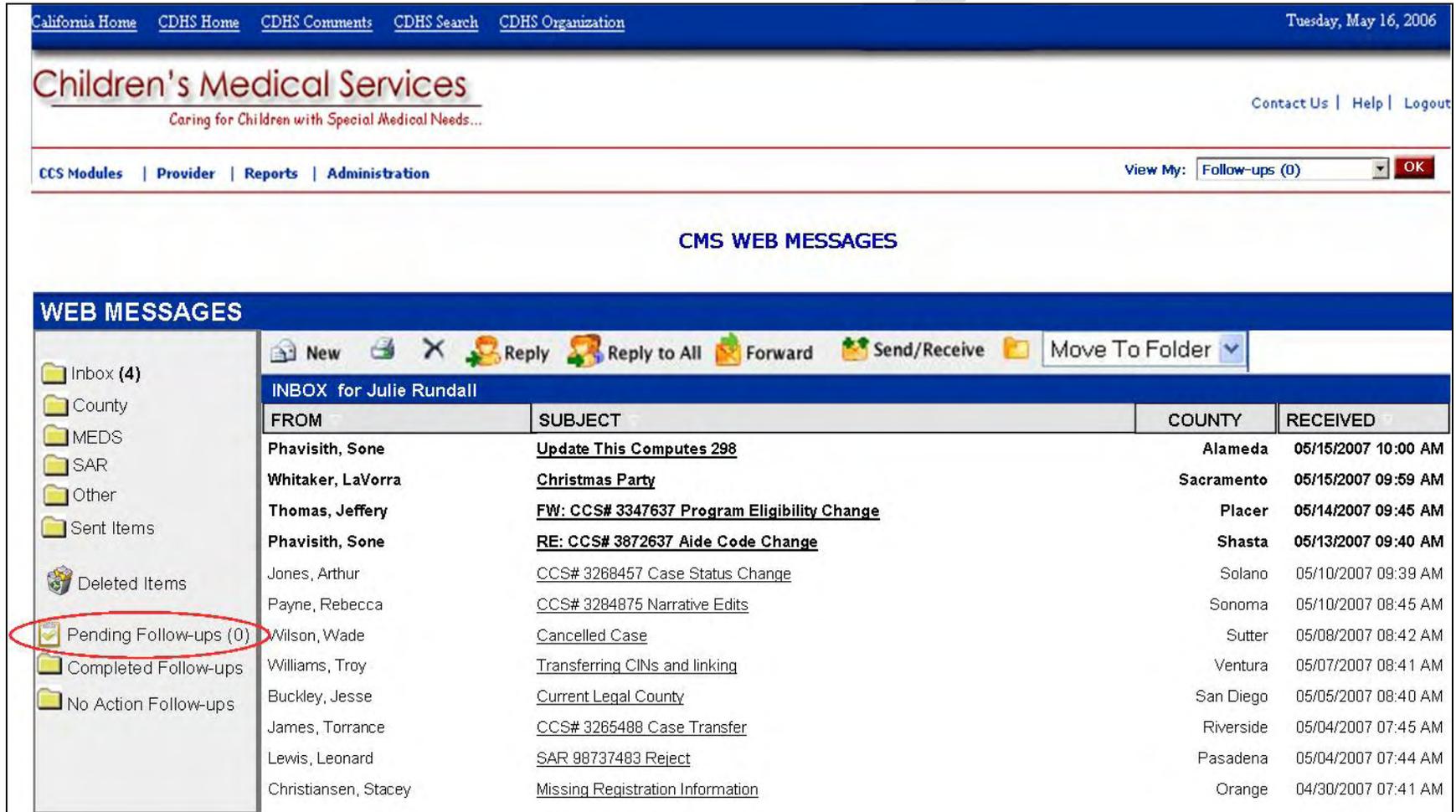


Figure 3-1, CMS Net Web Homepage

The 'View My' drop down list displays the follow-up option and a number in parentheses which indicates the number of tasks that needs to be completed by the current user or updates have been made regarding the follow-up.

Web Follow-up

The Follow-up module can also be accessed from within the Web Messages module by clicking the 'Pending Follow-ups' icon located on folder list as shown in Figure 3-2. In the example, the number in parentheses is zero; therefore, there are no new or updated follow-ups or tasks.



California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization Tuesday, May 16, 2006

Children's Medical Services

Caring for Children with Special Medical Needs... Contact Us | Help | Logout

CCS Modules | Provider | Reports | Administration View My: Follow-ups (0)

CMS WEB MESSAGES

WEB MESSAGES

INBOX for Julie Rundall

FROM	SUBJECT	COUNTY	RECEIVED
Phavisith, Sone	Update This Computes 298	Alameda	05/15/2007 10:00 AM
Whitaker, LaVorra	Christmas Party	Sacramento	05/15/2007 09:59 AM
Thomas, Jeffery	FW: CCS# 3347637 Program Eligibility Change	Placer	05/14/2007 09:45 AM
Phavisith, Sone	RE: CCS# 3872637 Aide Code Change	Shasta	05/13/2007 09:40 AM
Jones, Arthur	CCS# 3268457 Case Status Change	Solano	05/10/2007 09:39 AM
Payne, Rebecca	CCS# 3284875 Narrative Edits	Sonoma	05/10/2007 08:45 AM
Wilson, Wade	Cancelled Case	Sutter	05/08/2007 08:42 AM
Williams, Troy	Transferring CINs and linking	Ventura	05/07/2007 08:41 AM
Buckley, Jesse	Current Legal County	San Diego	05/05/2007 08:40 AM
James, Torrance	CCS# 3265488 Case Transfer	Riverside	05/04/2007 07:45 AM
Lewis, Leonard	SAR 98737483 Reject	Pasadena	05/04/2007 07:44 AM
Christiansen, Stacey	Missing Registration Information	Orange	04/30/2007 07:41 AM

Figure 3-2, Access Follow-ups

Follow-ups and tasks can also be accessed from the 'View My' drop down list located at the top right of the screen.

Web Follow-up

In Figure 3-3, it displays the current users pending follow-ups. All new or updated follow-ups are displayed in bold font. In the example, there are no new or updated follow-ups; therefore, the number in parentheses should be zero, as shown.

By default, the system will display the follow-ups list. However, the list can be changed to view by tasks by selecting the 'Tasks' option on the 'View by' drop down list. The view can be switched back to view by follow-ups by selecting the 'Follow-ups' option.

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization Tuesday, May 16, 2006

Children's Medical Services
Caring for Children with Special Medical Needs... Contact Us | Help | Logout

CCS Modules | Provider | Reports | Administration View My: Follow-ups (0)

CMS WEB MESSAGES

WEB MESSAGES

Inbox (4)
County
MEDS
SAR
Other
Sent Items
Deleted Items
Pending Follow-ups (0)
Completed Follow-ups
No Action Follow-ups

New Reply Reply to All Forward Send/Receive Search Follow-up View By:

Follow-ups for Rundall, Julie

ENTERED	REQUESTOR	FOLLOW-UP DESCRIPTION	STATUS	DUE DATE	PRIOR-ITY	ACTION CODE	COMPLETED DATE
05/14/2006	Whitaker, LaVorra	CCS# 3347637 Program Eligibility Change	Pending	07/30/2008	Routine	APPT	
05/10/2006	Paul, Yolonda	CCS# 3288457 Case Status Change	Pending	09/10/2007	Routine	ELDET	
05/05/2006	Paul, Yolonda	Submit Time Sheet	Pending	07/05/2008	Urgent	NA	
05/05/2007	Phelps, Mary Lou	Transfer to new CCS County	Pending	08/01/2007	Routine	XFR	
05/05/2007	Phelps, Mary Lou	Appointment	Pending	09/01/2007	Routine	APPT	

Figure 3-3, View List by Follow-ups

Pending Follow-ups with past due dates display in red font. New or updated Follow-ups display in bold font.

3.3 CREATE FOLLOW-UP VIA WEB MESSAGE

A follow-up is created using a web message. In this example, the current user is Julie Rundall and she is the one creating a follow-up.

Select a recipient as displayed in Figure 3-4. Recipients selected in the 'To' list are considered the Assigned users and recipients in the 'Cc' list are the Notified users.

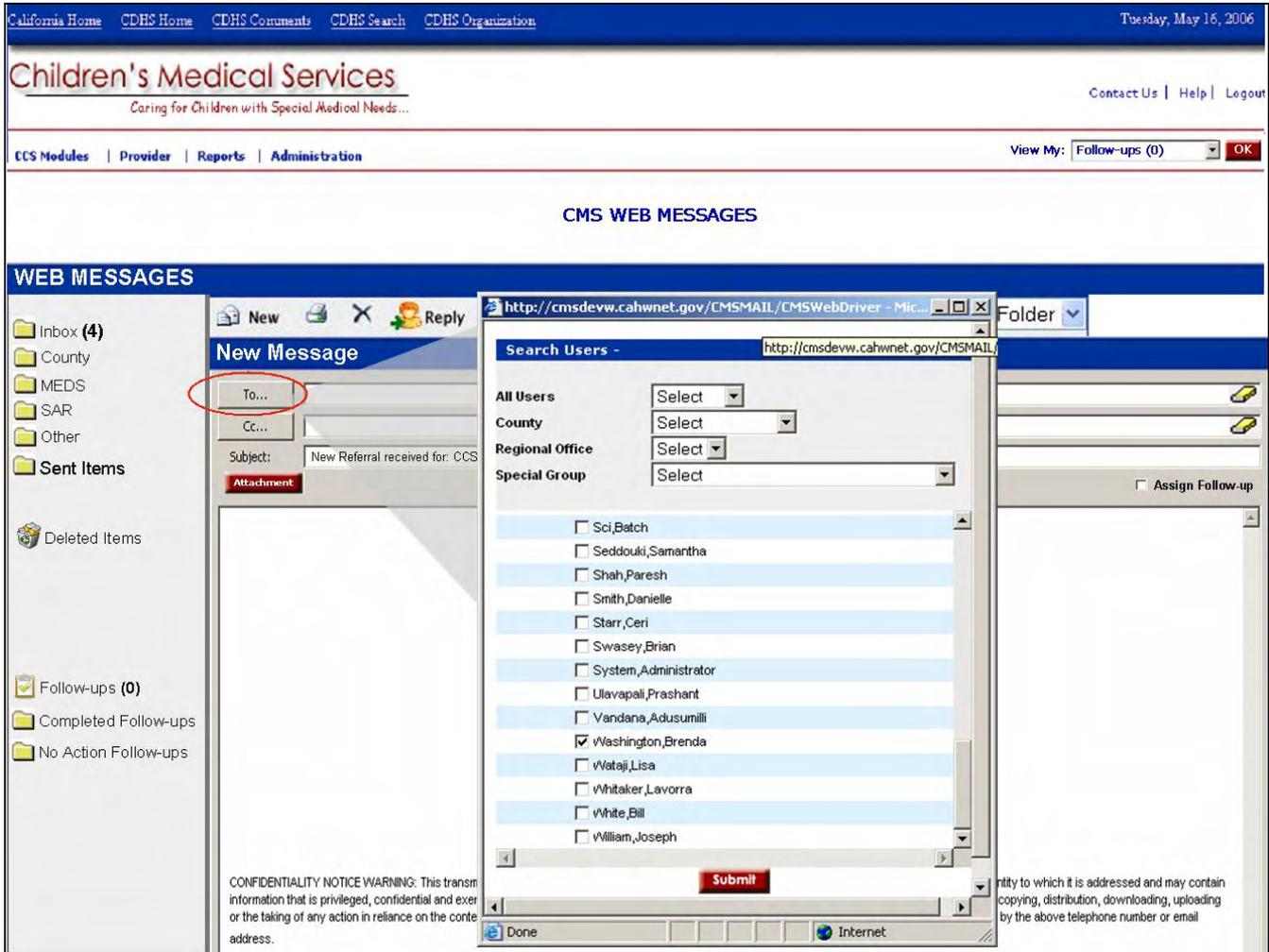


Figure 3-4, Select Recipients to be an Assigned or Notified User

Web Follow-up

After selecting the recipients, type in a relevant subject description for the Follow-up, then click the 'Assign Follow-up' check box as displayed in Figure 3-5.

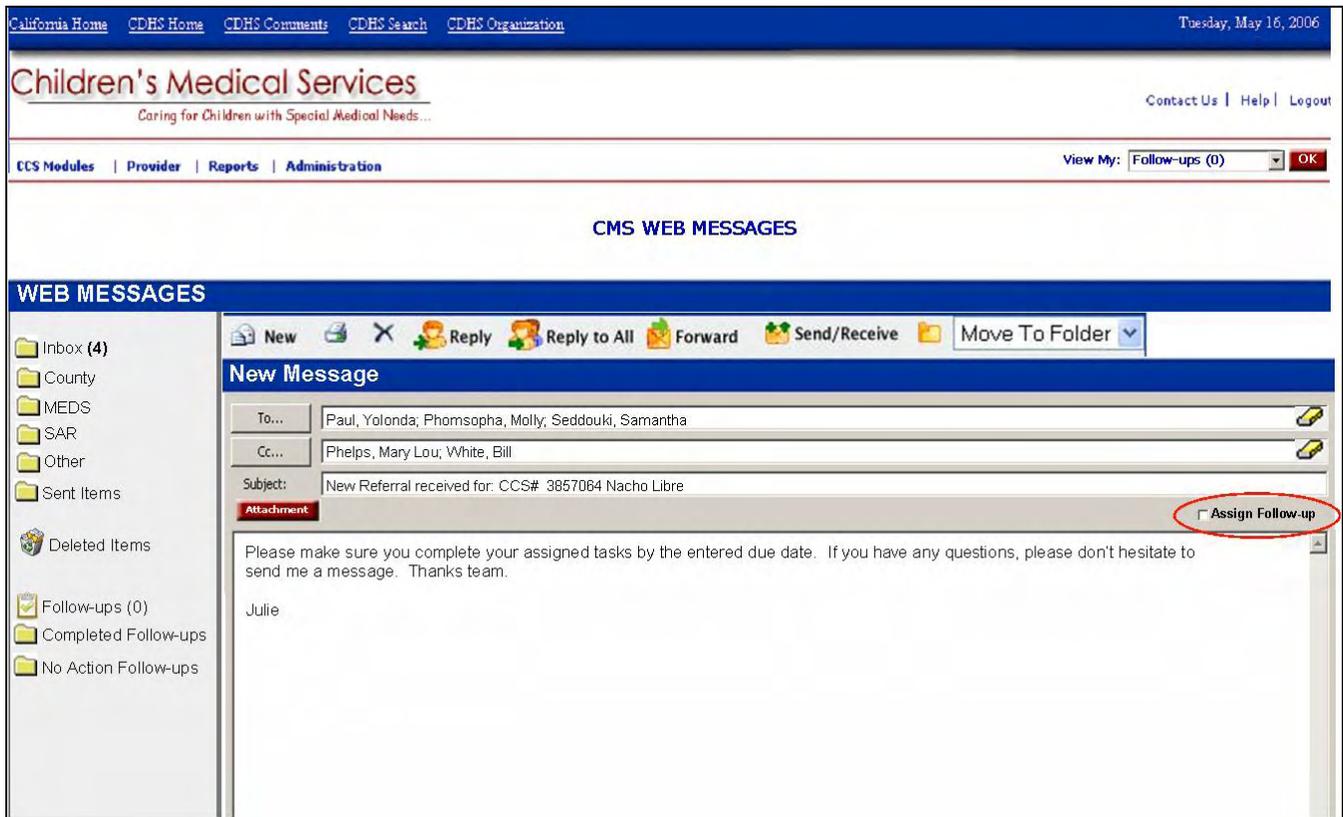


Figure 3-5, Use Check Box to Display Follow-up Details

Note: Removing the check mark changes the Follow-up back to a regular web message screen if the Follow-up has not yet been sent to the recipients. Once it is sent, the checkbox is locked.

Web Follow-up

The screen refreshes and displays the follow-up details screen once the 'Assign Follow-up' checkbox is checked as shown in Figure 3-6. The system displays the follow-up fields: Status, Due Date, Action Code, and Follow-up Completed Date. The required follow-up fields are marked with an asterisk.

The system also appends the 'Assigned Tasks' list to the web message. All fields and controls on this screen can be edited or used by the Requestor.

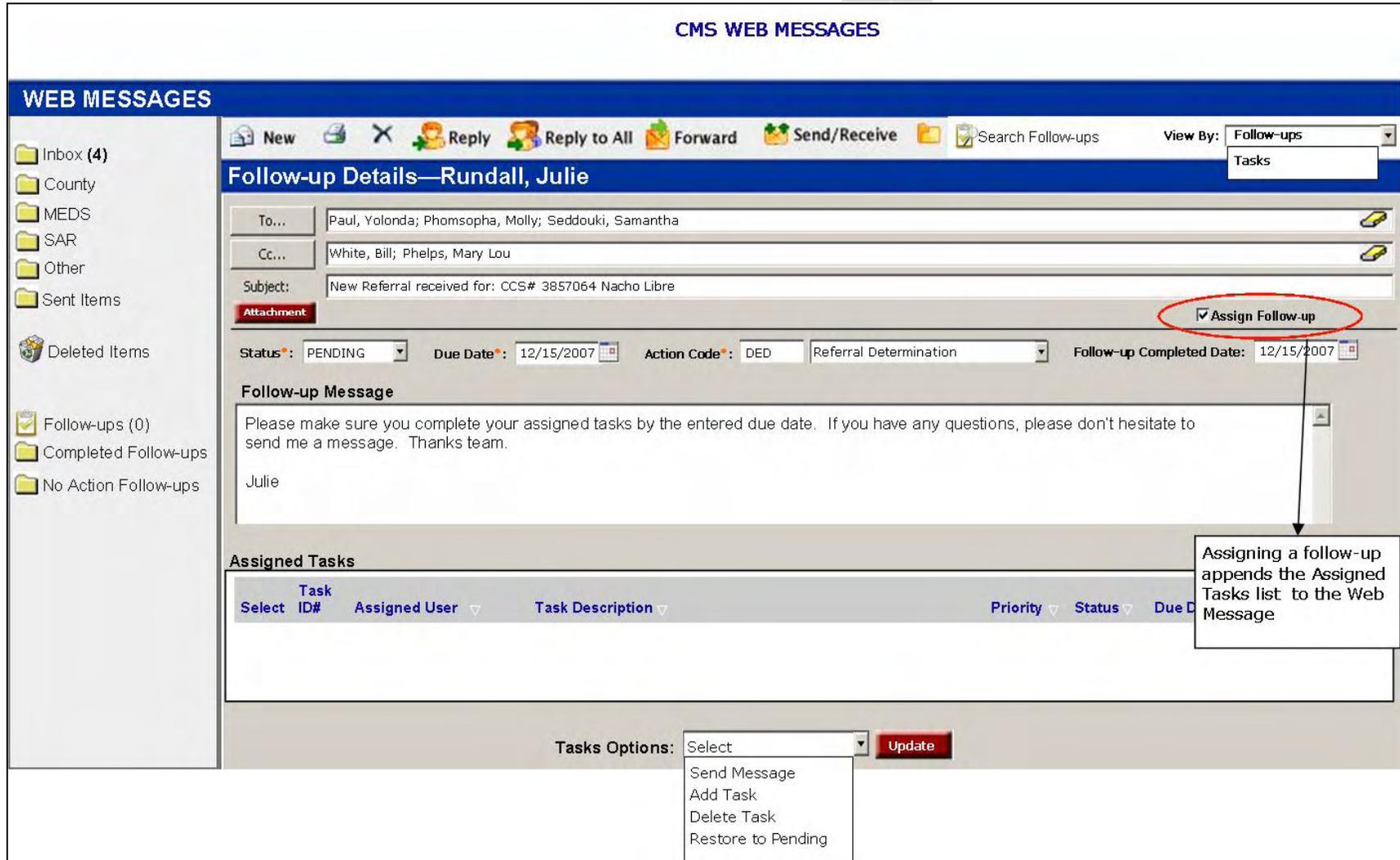


Figure 3-6, Create New Follow-up

Web Follow-up

The 'Task Options' drop down list displays four options that the Requestor can use:

1. Send Message
2. Add Task
3. Delete Task
4. Restore to Pending

Assigned and Notified users *only* have the option to use the 'Send Message' option.

At this point, the follow-up has no tasks added. Click the 'Send/Receive' icon to send the follow-up to the recipients.

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Figure 3-7 displays the follow-up after it has been sent. The body of the message has been rolled up in to a message thread. Click on the expand/collapse control icon ('+' sign) to display the follow-up message thread.

CMS WEB MESSAGES

WEB MESSAGES

Inbox (4)
County
MEDS
SAR
OTHER
Sent Items
Deleted Messages
Pending Follow-ups (1)
Completed Follow-ups
No Action Follow-ups

New Reply Reply to All Forward Send/Receive Search Follow-ups View By: Follow-ups

Follow-up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow-up

Status: PENDING Due Date: 12/15/2007 Action Code: DED Referral Determination Complete Date: 12/15/2007

+ Follow-up Message (1) ← After the Follow-up is sent the message will be formatted as a message thread

Assigned Tasks

Task Select	ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
-------------	-----	---------------	------------------	----------	--------	----------	----------------

Tasks Options: Select Update

Figure 3-7, Follow-up Message Thread

Web Follow-up

As a shortcut to view only new or unread follow-up messages, hover the mouse pointer over the expand/collapse control icon and the system will display a drop-down list of all the new and unread follow-up messages as displayed in Figure 3-8. This shortcut and feature is useful when message threads become large with many messages. The shortcut provides a way to display only the new messages without having to dig or drill down to look for them.

Click on the subject hyperlink to read the message. The message will display in a pop-up screen. As a rule, all messages in a thread will be read on a pop-up screen.

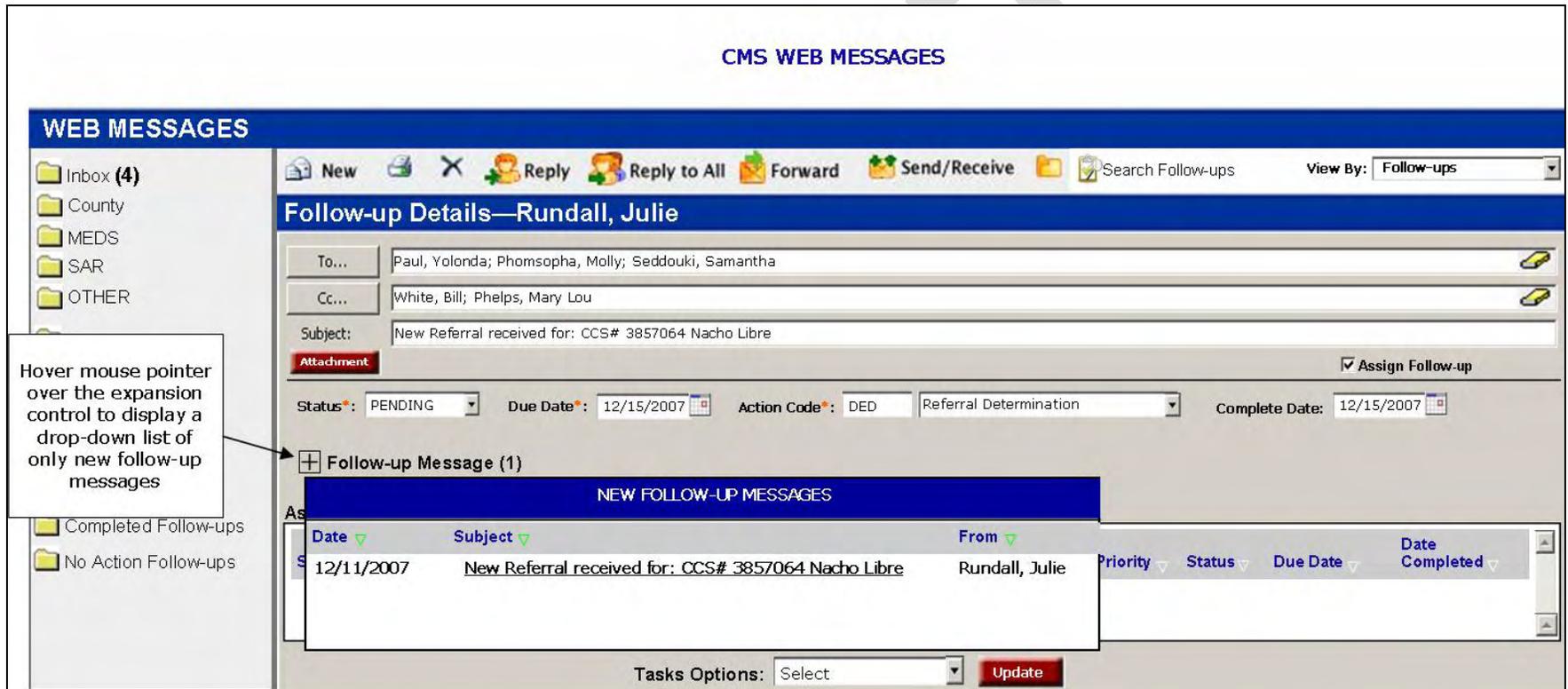


Figure 3-8, New Thread Message drop-down list

Figure 3-9 is an example of actually clicking on the expand/collapse control icon to expand the list of message in the follow-up thread. When the icon is clicked, the '+' sign changes to a '-' sign. Click the '-' sign to collapse the thread and the icon changes back to a '+' sign.

All new or unread follow-up messages will display in bold font. Click subject hyperlink to read the message.

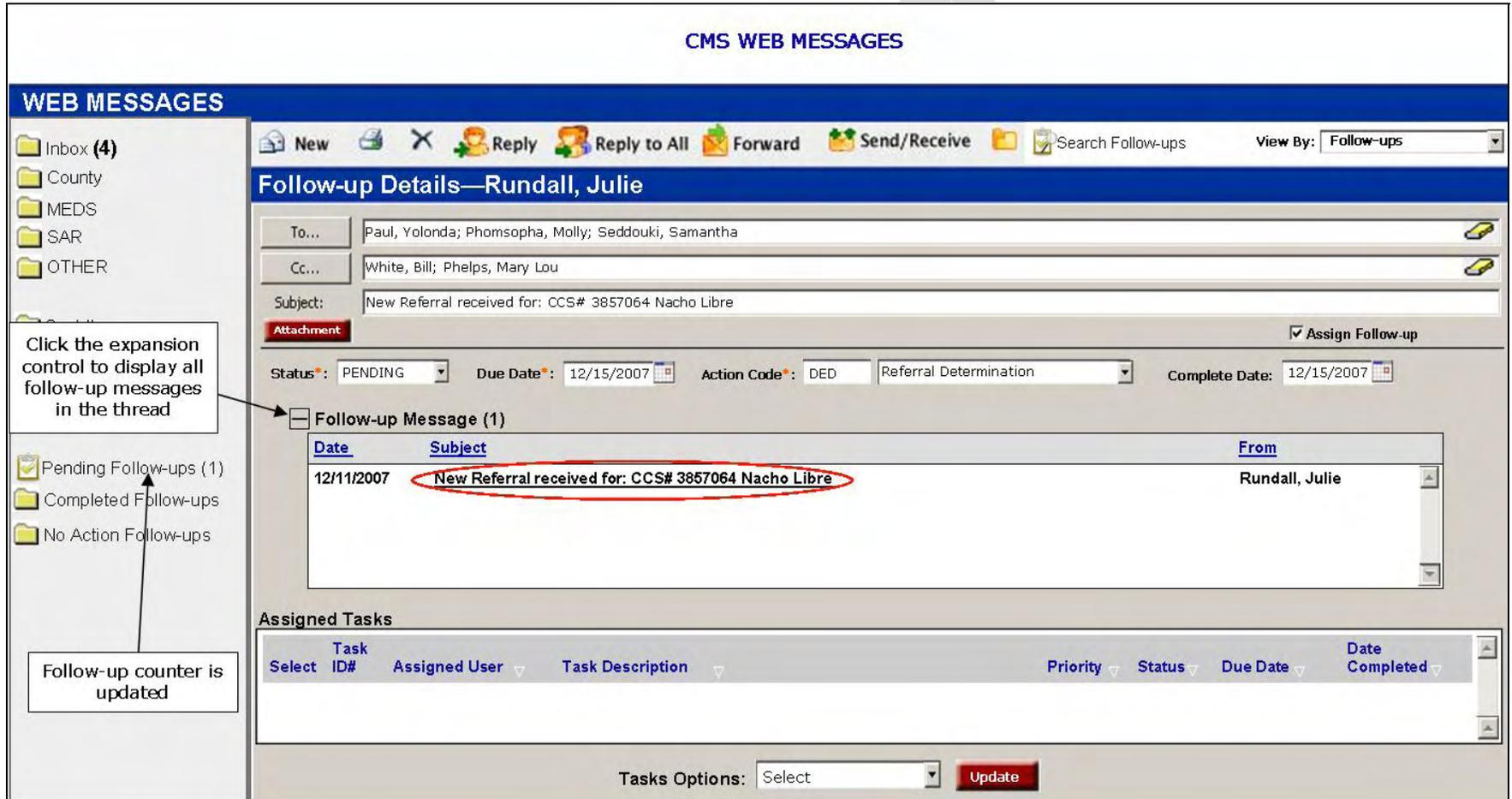


Figure 9, Using the Expand/Collapse Icon

Messages will be seen on the screen if the user is a Recipient of the message.

Web Follow-up

Figure 3-10 displays a pop-up screen of the message from the follow-up message thread. Notice the body of the message is the original message sent to the Recipients by the Requestor.

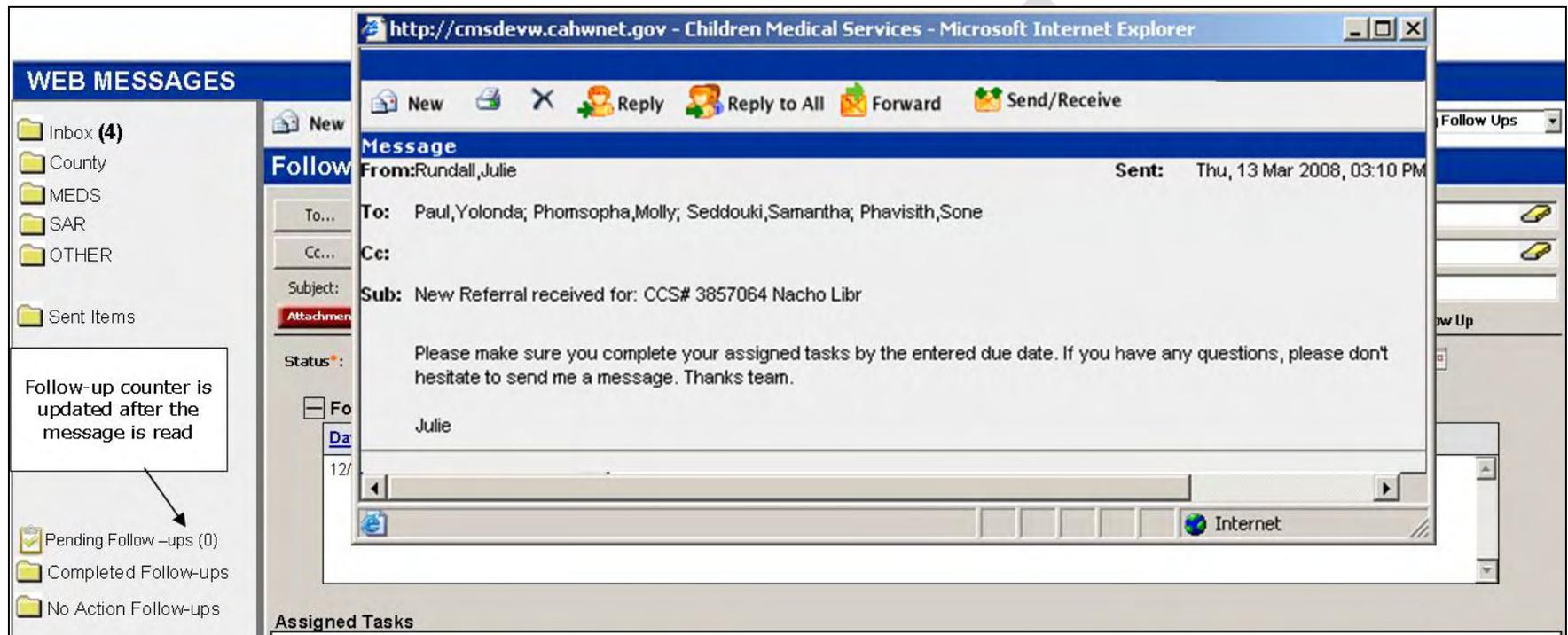


Figure 3-10, Pop-up Message Screen

The following Web Message functionalities can be used from the module menu bar:

1. **New** – Creates a new message. When sent, the message displays a new subject entry in the follow-up thread
2. **Print** – Prints the current message.
3. **Delete (X)** – Disabled. Not in use. Message threads cannot be deleted.
4. **Reply** – Creates a reply message to the sender. Displays underneath and indented to the right of the parent message.
5. **Reply to All** – Creates a reply message to the sender and all the Recipients. Displays underneath and indented to the right of the parent message.
6. **Forward** – Forwards the message to other Recipients.

The system will send the messages to the follow-up or task message thread if any of the Recipients are a part of the follow-up meaning the user is an assigned or notified user. For all other users not a part of the follow-up, the system will send the messages to the Web Message Inbox.

Figure 3-11 displays an example of a reply message to a follow-up message.

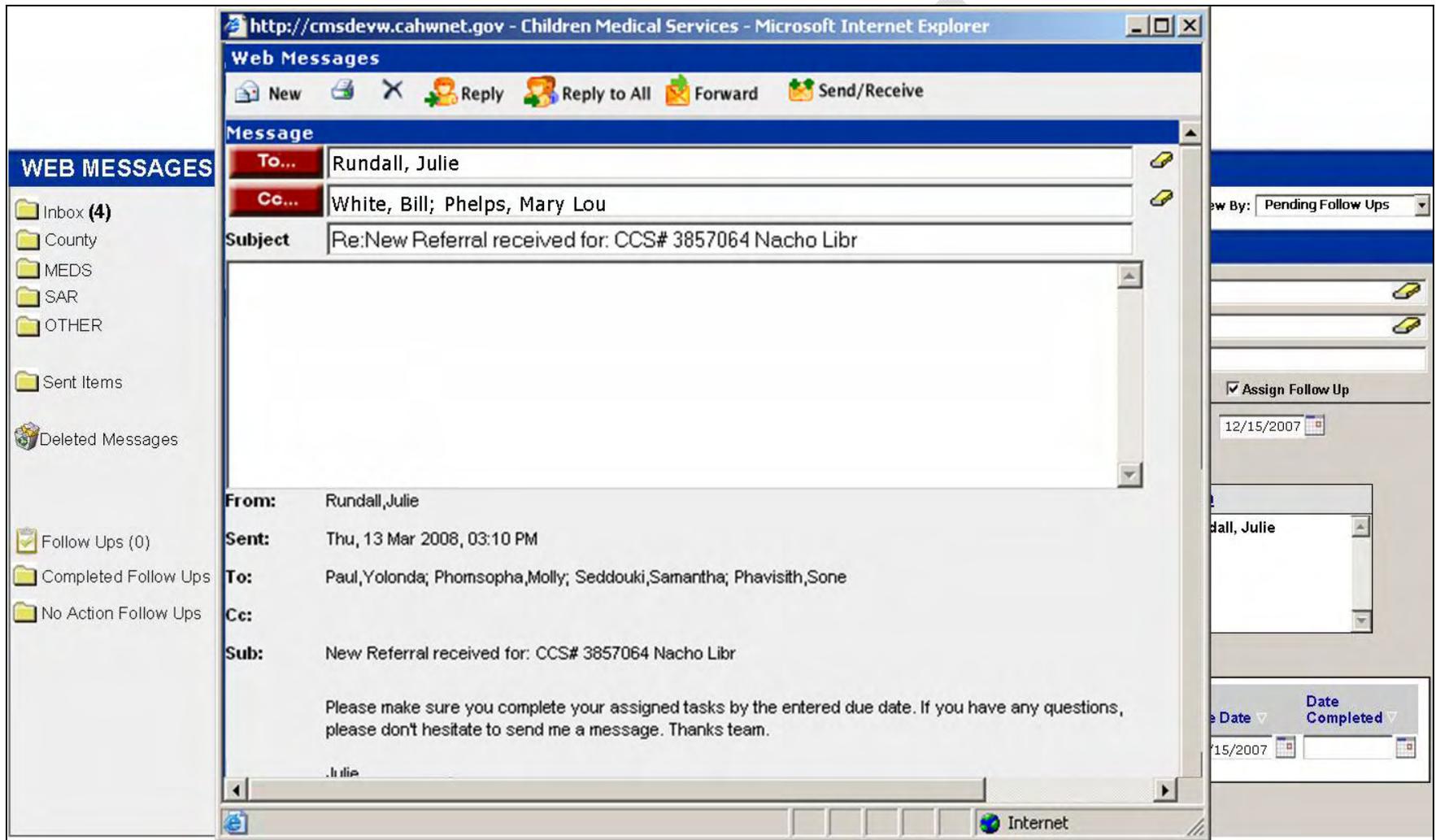


Figure 3-11, Reply to Follow-up Message

Figure 3-12 displays the reply message in the follow-up message thread. All reply messages will display underneath and be indented to right of the parent message.

CMS WEB MESSAGES

WEB MESSAGES

Inbox (4)

- County
- MEDS
- SAR
- OTHER

Sent Items

Deleted Messages

Follow-ups (1)

- Reply or new messages will be added to the message thread.
- A reply to a particular message will display below the original and indented to the right.
- Unread messages will display in bold font.

Follow-up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow-up

Status: PENDING **Due Date:** 12/15/2007 **Action Code:** DED Referral Determination **Complete Date:** 12/15/2007

Follow-up Message (1)

Date	Subject	From
12/11/2007	<input type="checkbox"/> New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Paul, Yolonda

Assigned Tasks

Task	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
Select ID#						

Tasks Options: Select Update

Figure 3-12, Reply Message added to Follow-up Message Thread

17

Figure 3-13 displays an example of a follow-up message thread with a different subject description.

CMS WEB MESSAGES

WEB MESSAGES

- Inbox (4)
- County
- MEDS
- SAR
- OTHER
- Sent Items
- Deleted Messages
- Follow Ups (1)
- Completed Follow Ups
- No Action Follow Ups

New Reply Reply to All Forward Send/Receive Search Follow Ups
View By: Follow Ups

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Assign Follow Up

Status*: PENDING Due Date*: 12/15/2007 Action Code*: DED Referral Determination Complete Date: 12/15/2007

Follow Up Message (1)

Date	Subject	From
12/11/2007	<input type="checkbox"/> New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Paul, Yolonda
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Phelps, Mary Lou
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	White, Bill
12/11/2007	<input type="checkbox"/> Need more help to complete the referral tasks	Phomsopha, Molly

Assigned Tasks

Task Select	ID#	Assigned User	Task Description	Status	Due Date	Date Completed

Tasks Options: Send Message Update

Use the 'Send Message' option to create a new thread or new message topic relating to the current follow up

Figure 3-13, Follow-up message with different subject description

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3.4 ADD TASK

Tasks can be added to the follow-up by selecting the 'Add Task' option from the Task Options drop-down list. The system will add the new task item in the task list.

CMS WEB MESSAGES

WEB MESSAGES

- 📁 Inbox (4)
- 📁 County
- 📁 MEDS
- 📁 SAR
- 📁 OTHER
- 📁 Sent Items
- 🗑️ Deleted Messages
- 📁 Pending Follow Ups (1)
- 📁 Completed Follow Ups
- 📁 No Action Follow Ups

New
 X
 Reply
 Reply to All
 Forward
 Send/Receive
 Search Follow Ups
View By: Follow Ups

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow Up

Status*: PENDING Due Date*: 12/15/2007 Action Code*: DED Referral Determination Complete Date: 12/15/2007

Follow Up Message (1)

Date	Subject	From
12/11/2007	<input type="checkbox"/> New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Paul, Yolonda
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Phelps, Mary Lou
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	White, Bill
12/11/2007	<input type="checkbox"/> Need more help to complete the referral tasks	Phomsopha, Molly

Assigned Tasks

Task Select	ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> Paul, Yolonda Phomsopha, Molly Seddouki, Samantha </div>	Register patient in CMS Net	Routine	Pending	12/15/2007	

Tasks Options: Add Task Update Default values

Assign a user using the drop-down list.

The list will only display the users listed as recipients in the 'To:' list.

Figure 3-14, Add Task to Follow-up

Web Follow-up

Figure 3-15 displays the assigned user control (red horizontal icon) where the Requestor can un-assign the task or add a new user to the follow-up. Hover the mouse pointer over the control to display a drop-down menu. Click the 'Unassigned Task' option to un-assign the current task. Click the 'Add New User' option to display the distribution list of users to add the follow-up.

CMS WEB MESSAGES

WEB MESSAGES

New Reply Reply to All Forward Send/Receive Search Follow Ups

View By: Follow Ups

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment
 Assign Follow Up

Status*: PENDING
Due Date*: 12/15/2007
Action Code*: DED Referral Determination
Complete Date: 12/15/2007

Follow Up Message (1)

Date	Subject	From
12/11/2007	<input type="checkbox"/> New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Paul, Yolonda
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Phelps, Mary Lou
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	White, Bill
12/11/2007	<input type="checkbox"/> Need more help to complete the referral tasks	Phomsopha, Molly

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	in CMS Net	Routine	Pending	12/15/2007	

Tasks Options: Select
Update

Hover the mouse pointer over the red triangle to display additional options for assigning a user to the task.

Unassigned Task
 Add New User

Figure 3-15, Assigned User Options

21

Web Follow-up

Once the task entry fields are entered, click the 'Update' button to save the changes. The screen will refresh and displays the task message control thread with one new message as shown in Figure 3-16. The task message thread and the controls work exactly the same as the follow-up message thread.

CMS WEB MESSAGES

WEB MESSAGES

New Reply Reply to All Forward Send/Receive Search Follow Ups

View By: Follow Ups

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Assign Follow Up

Status*: PENDING Due Date*: 12/15/2007 Action Code*: DED Referral Determination Complete Date: 12/15/2007

Follow Up Message (1)

Date	Subject	From
12/11/2007	<input type="checkbox"/> New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Paul, Yolonda
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	Phelps, Mary Lou
12/11/2007	<input type="checkbox"/> Re: New Referral received for: CCS# 3857064 Nacho Libre	White, Bill
12/11/2007	<input type="checkbox"/> Need more help to complete the referral tasks	Phomsopha, Molly

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Pending	12/15/2007	

Task Message (1)

Tasks Options: Select Update

After clicking 'Update' the system sends a task message of the updated task event.

Figure 3-16, Task Message Thread

Figure 3-17 displays the newly added task with the task message thread expanded.

The screenshot displays the 'CMS WEB MESSAGES' interface. On the left is a navigation pane with folders: 'Inbox (4)', 'County', 'MEDS', 'SAR', 'OTHER', 'Deleted Messages', 'Pending Follow Ups (1)', 'Completed Follow Ups', and 'No Action Follow Ups'. A callout box points to the 'OTHER' folder with the text 'Follow Up message thread is collapsed.' The main area is titled 'Follow Up Details—Rundall, Julie' and contains a form with fields for 'To...', 'Cc...', and 'Subject:'. Below this is an 'Assigned Tasks' table with columns for 'Task ID#', 'Assigned User', 'Task Description', 'Priority', 'Status', 'Due Date', and 'Date Completed'. A task with ID# 01 is assigned to 'Paul, Yolonda' with the description 'Register patient in CMS Net'. Below the task table is a 'Task Message (1)' section with a table showing a message dated '12/12/2007' with the subject 'Task Added' from 'Rundall, Julie'. A callout box points to the minus sign icon next to 'Task Message (1)' with the text 'Click to expand the task message thread'. At the bottom, there are 'Tasks Options' and an 'Update' button.

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow Up

Status*: PENDING Due Date*: 12/15/2007 Action Code*: DED Referral Determination Complete Date: 12/15/2007

+ Follow Up Message

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Pending	12/15/2007	

- Task Message (1)

Date	Subject	From
12/12/2007	- Task Added	Rundall, Julie

Tasks Options: Select Update

Figure 3-17, Task Added with new message in Task Message Thread

Web Follow-up

Click on the subject hyperlink to display a pop-up screen to read the task message as shown in Figure 3-18. Updates made to the task fields will generate a task message in the task thread. See more information in section 3.11 about task message templates.

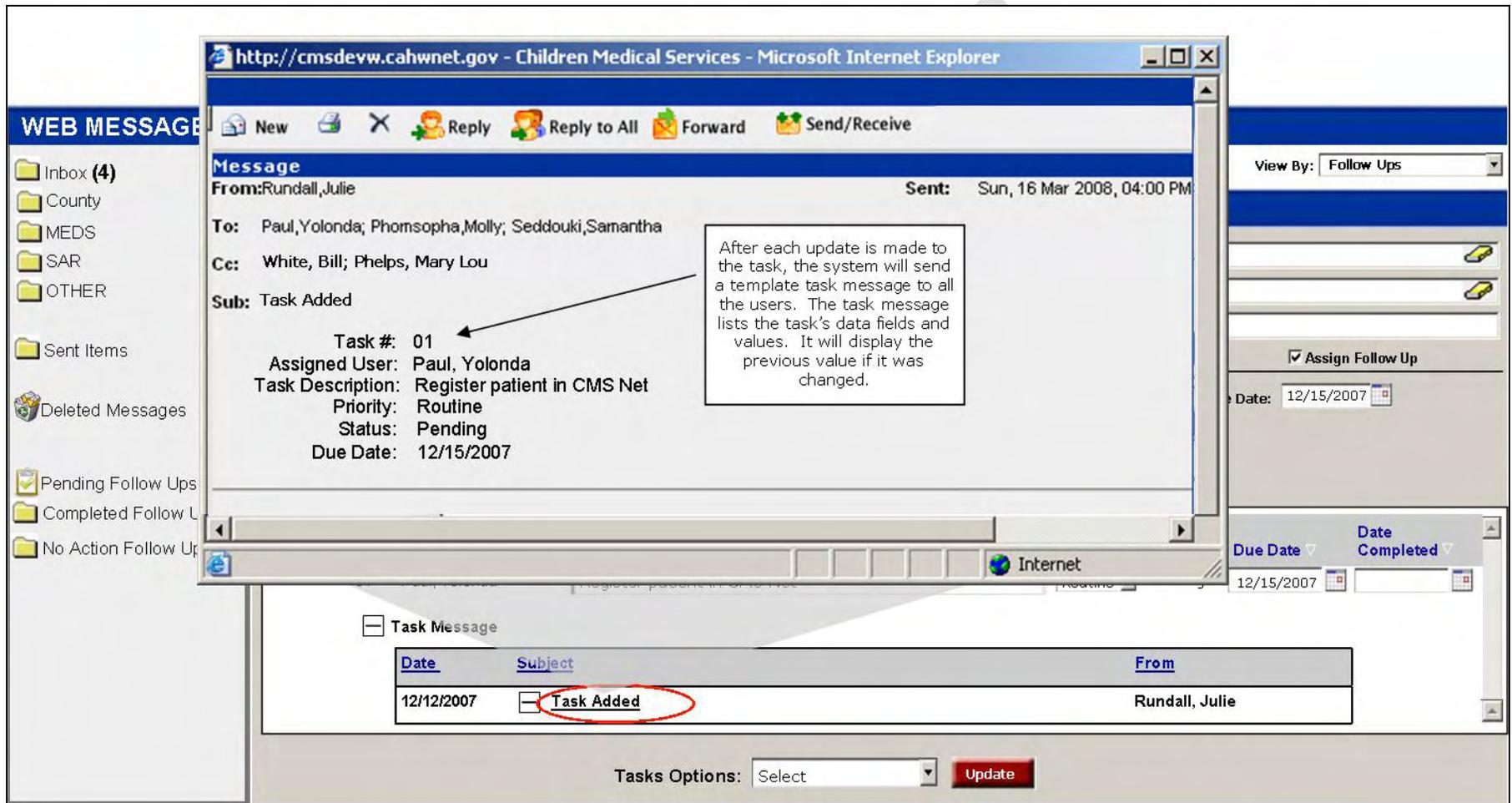


Figure 3-18, Task Message Template

Figure 3-19 displays the follow-up with additional tasks.

CMS WEB MESSAGES

WEB MESSAGES

New
 Reply
 Reply to All
 Forward
 Send/Receive
 Search Follow Ups

View By: Follow Ups

Follow Up Details—Rundall, Julie

To...: Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc...: White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Assign Follow Up

Status: PENDING
Due Date: 12/15/2007
Action Code: DED Referral Determination
Follow Up Completed Date: 12/15/2007

Follow Up Messages

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Pending	12/15/2007	
Task Message							
<input type="checkbox"/>	02	Seddouki, Saman-	Send out Application to family. Include PSA.	Routine	Pending	12/15/2007	
Task Message (1)							
<input type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential, Medi-	Routine	Pending	12/15/2007	
Task Message (3)							

NEW TASK MESSAGES

Date	Subject	From
12/11/2007	User Assigned	Rundall, Julie
12/11/2007	PSA has been signed	White, Bill
12/11/2007	Priority Escalated	Rundall, Julie

Hover mouse pointer over Task Message control to display the drop-down list of new task messages for the task

Figure 3-19, Follow-up with additional task items added

3.5 ASSIGNED USERS' FOLLOW-UP LIST

Figure 3-20 displays the list of Follow-ups for one of the assigned users, Yolonda Paul. Currently, the assigned user has four pending Follow-ups which include a *newly unread* one that was sent from Julie Rundall displayed in the bold format.

There are two types of views to list the items: Follow-ups or Tasks. The system defaults to the list of Follow-ups as shown below. The view can be changed to list the tasks by selecting the task option on the 'View By' drop down list.

The screenshot shows the 'Children's Medical Services' web application. At the top, there are navigation links for California Home, CDHS Home, CDHS Comments, CDHS Search, and CDHS Organization. The date is Tuesday, May 16, 2006. The main header includes the site name and tagline 'Caring for Children with Special Medical Needs...'. Below this is a navigation bar with 'CCS Modules | Provider | Reports | Administration' and a 'View My: Follow Ups (1)' dropdown menu. The main content area is titled 'CMS WEB MESSAGES' and contains a 'WEB MESSAGES' section. On the left is a folder tree with 'Inbox (4)', 'County', 'MEDS', 'SAR', 'OTHER', 'Sent Items', and 'Recycle Bin'. The 'Pending Follow Ups (1)' folder is circled in red. The main area shows a toolbar with icons for New, Reply, Reply to All, Forward, and Send/Receive, along with a search box. Below the toolbar is a table titled 'Follow Ups—Yolonda Paul' with the following data:

Entered	Requestor	Follow Up Description	Status	Due Date	Priority	Action Code	Completed Date
12/11/2007	Rundall, Julie	New Referral received for: CCS# 3657064 Nacho Libre	Pending	12/15/2007	Routine	DED	
05/14/2008	Whitaker, LaVorra	CCS# 3347837 Program Eligibility Change	Pending	07/30/2008	Routine	APPT	
05/10/2006	Paul, Yolonda	CCS# 3268457 Case Status Change	Pending	09/10/2007	Routine	ELDET	
05/05/2006	Paul, Yolonda	Submit Time Sheet	Pending	07/05/2008	Urgent	NA	

Figure 3-20, Follow-up List of an Assigned User

Notice the module header has changed when accessing the Follow-up folder. The folder drop down list and the new folder icon is not displayed and have been replaced with a new icon called 'Search Follow-up'. Follow-up items displayed in red font are past due. Click the subject hyperlink to view more details of Follow-up.

Figure 3-21 displays the details of the Follow-up for Yolonda Paul (assigned user). On this screen the assigned user can only change their task status and send a follow-up or task message.

CMS WEB MESSAGES

WEB MESSAGES

Inbox (4)
 County
 MEDS
 SAR
 OTHER
 Sent Items
 Deleted Messages
 Pending Follow Ups (1)
 Completed Follow Ups
 No Action Follow Ups

New Reply Reply to All Forward Send/Receive Search Follow Ups / Tasks View By: Follow Ups

Follow Up Details—Yolonda Paul

To: Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha
 Cc: White, Bill; Phelps, Mary Lou
 Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow Up

Status: PENDING Due Date: 12/15/2007 Action Code: DED Referral Determination Follow Up Date Completed: _____

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Pending 12/15/2007
+ Task Message					
<input type="checkbox"/>	02	Seddouki, Samantha	Send out Application to family. Include PSA.	Routine	Pending 12/15/2007
+ Task Message (1)					
<input type="checkbox"/>	03	Phomsopha, Molly	...ncial, Residential, Medical,	Routine	Pending 12/15/2007
+ Task Message (3)					

Tasks Options: Send Message

'Date Completed' is the only field available for edit by the Assigned/Notified user

'Send Message' is the only task option available to use by the Assigned/Notified user

Figure 3-21, Follow-up Details for the Assigned User

3.6 REQUESTOR FOLLOW-UP LIST

Figure 3-22 displays the six pending Follow-ups for the requestor, Julie Rundall. The Follow-up that was just created is the first one on the list.

The screenshot shows the 'Children's Medical Services' web application. At the top, there are navigation links for 'California Home', 'CDHS Home', 'CDHS Comments', 'CDHS Search', and 'CDHS Organization'. The date 'Tuesday, May 16, 2006' is displayed in the top right. Below the header, there are links for 'Contact Us', 'Help', and 'Logout'. A navigation bar contains 'CCS Modules', 'Provider', 'Reports', and 'Administration'. A 'View My:' dropdown menu is set to 'Follow Ups (4)'. The main content area is titled 'CMS WEB MESSAGES' and 'WEB MESSAGES'. On the left, there is a sidebar with folders: 'Inbox (4)', 'County', 'MEDS', 'SAR', 'OTHER', 'Sent Items', and 'Deleted Messages'. The main area shows a list of follow-up messages for Julie Rundall. The messages are as follows:

Entered	Requestor	Follow Up Description	Status	Due Date	Priority	Action Code	Completed Date
12/10/2007	Rundall, Julie	New Referral received for: CCS# 3857064 Nacho Libre	Pending	12/15/2007	Routine	DED	
05/10/2007	Rundall, Julie	Deny Request for Service	Pending	06/10/2007	Routine	PREQ	
05/05/2007	Rundall, Julie	Submit Time Sheet	Pending	07/05/2007	Urgent	NA	
05/05/2007	White, Bill	User Group Meeting 11-10-2007	Pending	11/01/2007	Routine	PEND	
05/05/2007	Phelps, Mary Lou	Transfer to new CCS County	Pending	08/01/2007	Routine	XFR	
05/05/2007	Phelps, Mary Lou	Appointment	Pending	08/01/2007	Routine	APPT	

Figure 3-22, Requestors Follow-up List

Click the subject hyperlink to view the Follow-up details for the Requestor.

Figure 3-23 displays the Requestors' Follow-up details screen. From this screen the requestor can edit all Follow-up and task fields.

CMS WEB MESSAGES

WEB MESSAGES

New Reply Reply to All Forward Send/Receive Search Follow Ups

View By: Follow Ups

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Assign Follow Up

Status: PENDING

Due Date: 12/15/2007

Action Code: DED Referral Determination

Follow Up Completed Date: 12/15/2007

Follow Up Messages

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Pending	12/15/2007	
<input type="checkbox"/> Task Message							
<input type="checkbox"/>	02	Seddouki, Saman-	Send out Application to family. Include PSA.	Routine	Pending	12/15/2007	
<input type="checkbox"/> Task Message (1)							
<input type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential, Medi-	Routine	Pending	12/15/2007	
<input type="checkbox"/> Task Message (3)							

Tasks Options: Select Update

Figure 3-23, Requestors Follow-up Details Screen

3.7 ADD USERS TO FOLLOW-UP

Additional users can be added by using the 'To' button or the assigned user control (red horizontal icon). Figure 3-24 displays the selection of a new Assigned user named Brenda Washington.

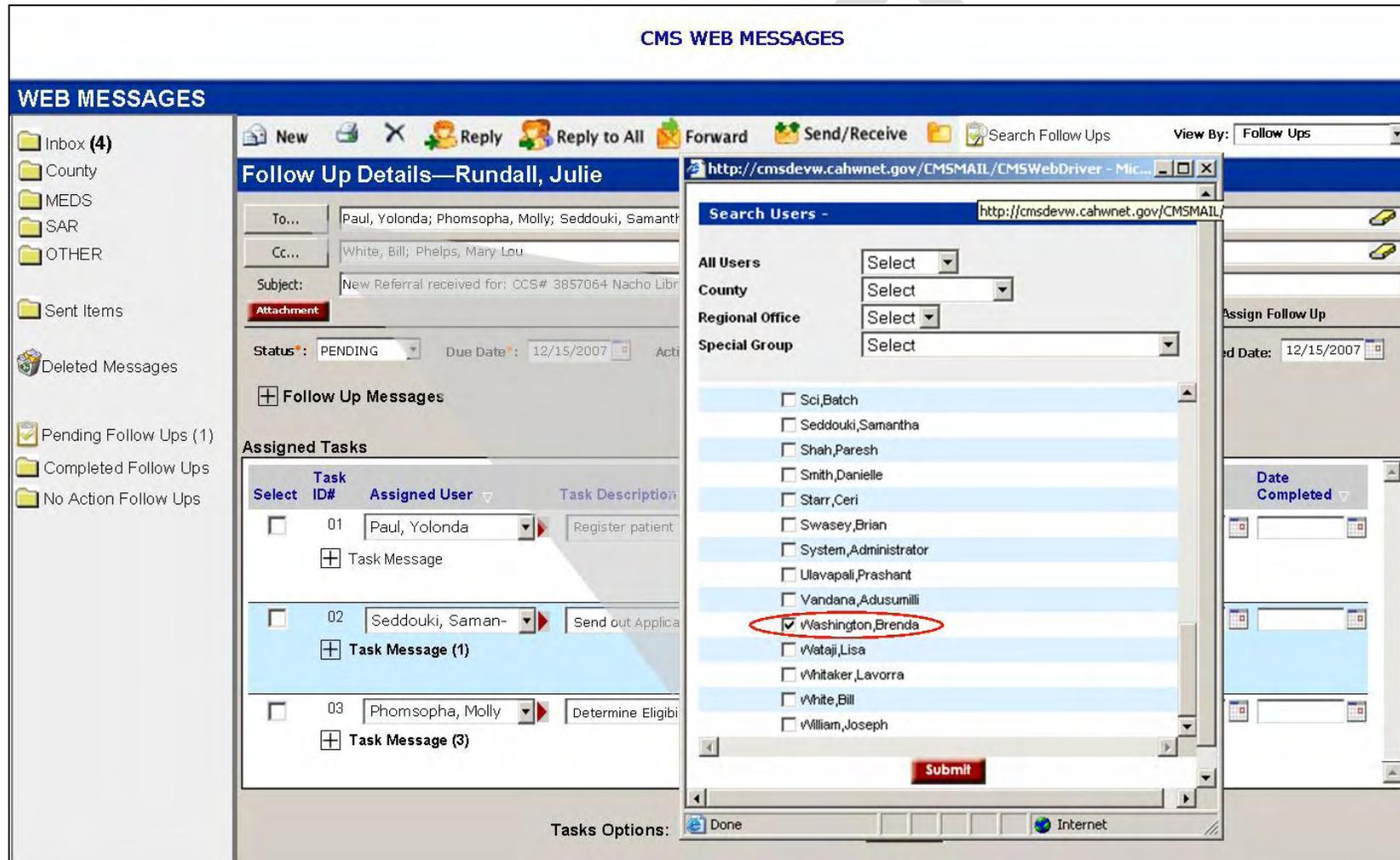


Figure 3-24, Add Additional Users

Figure 3-25 displays the new user as a Recipient and listed as an assigned user.

WEB MESSAGES

Inbox (4)
 County
 MEDS
 SAR
 OTHER
 Sent Items
 Deleted Messages
 Pending Follow-up (5)
 Completed Follow-ups
 No Action Follow-ups

Follow-up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha; **Washington, Brenda**

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment

Status: PENDING Due Date: 12/15/2007 Action Code: DED Ref

Assign Follow-up

Follow-up Completed Date: 12/15/2007

Follow-up Message (1)

Date	Subject	From
12/11/2007	+ New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	+ Need more help to complete the referral tasks	Phomsopha, Molly
12/11/2007	+ User added to the follow-up	Rundall, Julie

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Pending	12/15/2007	
+ Task Message							
<input type="checkbox"/>	02	Seddouki, Samantha	Send out Application to family. Include PSA.	Routine	Pending	12/15/2007	
+ Task Message (1)							
<input type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential,	Routine	Pending	12/15/2007	
+ Task Message (3)							

Tasks Options: Select

Figure 3-25, New Assigned User Added to the Follow-up

3.8 REMOVE USERS FROM A FOLLOW-UP

Assigned users can be removed by using the eraser icon located to the far right of the 'To' and 'Cc' field. Click on the icon to display the list of select Recipients and remove the check mark next the user name as shown in Figure 3-26. In this example, Yolonda Paul is being removed. When removed, user will be actually moved to the 'Bcc:' field.

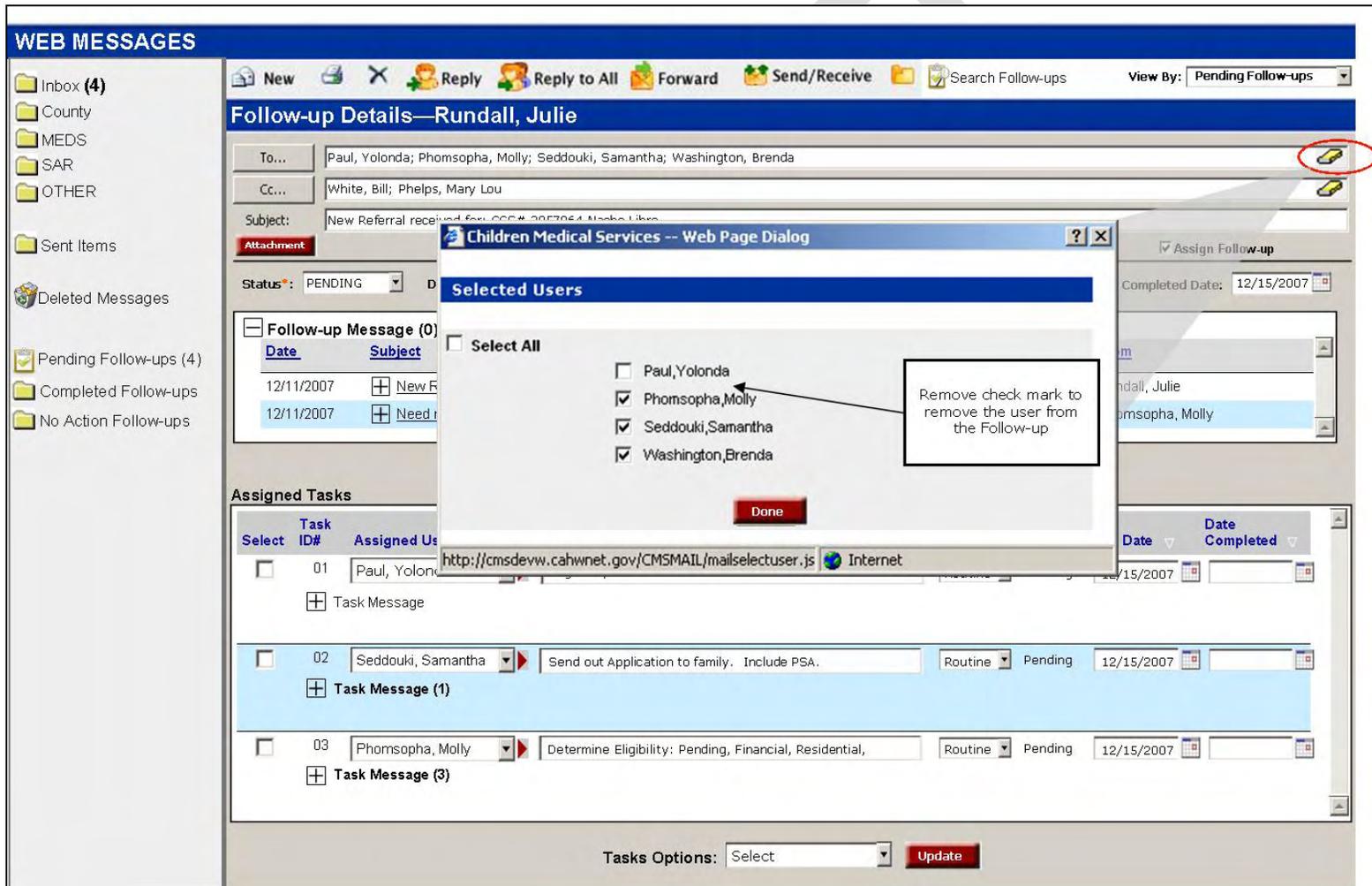


Figure 26, Remove User from Follow-up

WEB MESSAGES

New Reply Reply to All Forward Send/Receive Search Follow-ups

View By: Follow-ups

Inbox (4)

Yolonda Paul has been removed from the follow-up.

A new follow-up message is sent to only the removed user detailing the removal of the assigned user.

Deleted messages

Pending Follow-ups (3)

Completed Follow-ups

No Action Follow-ups

Follow-up Details—Rundall, Julie

To... Phomsopha, Molly; Seddouki, Samantha; Washington, Brenda

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Assign Follow-up

Status: PENDING **Due Date:** 12/15/2007 **Action Code:** DED Referral Determination **Follow-up Completed Date:** 12/15/2007

Follow-up Message (2)

Date	Subject	From
12/11/2007	+ New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	+ Need more help to complete the referral tasks	Phomsopha, Molly
12/11/2007	+ Assigned user added to follow-up	Rundall, Julie
12/11/2007	+ Assigned user removed from follow-up	Rundall, Julie

Assigned Tasks

Task Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Unassigned Task	Register patient in CMS Net	Routine	Pending	12/15/2007	
+ Task Message (1)							
<input type="checkbox"/>	02	Seddouki, Samantha	Send out Application to family. Include PSA.	Routine	Pending	12/15/2007	
+ Task Message							
<input type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential,	Routine	Pending	12/15/2007	
+ Task Message							

Tasks Options: Select Update

Figure 27, Assigned User has been removed from the Follow-up

33

Although the system did indicate Yolonda Paul was removed from the Follow-up, it remains in her Follow-up list marked as new. The feature makes the formerly-assigned user aware that changes have been made to the Follow-up. Figure 3-28 displays the Follow-up marked as new. Click the subject hyperlink to view the Follow-up.

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization Tuesday, May 16, 2006

Children's Medical Services

Caring for Children with Special Medical Needs...

Contact Us | Help | Logout

CCS Modules | Provider | Reports | Administration View My: Follow Ups (1)

CMS WEB MESSAGES

WEB MESSAGES

New ✕ Reply Reply to All Forward Send/Receive Search Follow Up

FOLLOW UPS for Yolonda Paul

ENTERED	REQUESTOR	FOLLOW DESCRIPTION	STATUS	DUE DATE	PRIOR-ITY	ACTION CODE	COMPLETED DATE
12/11/2007	Rundall, Julie	New Referral received for: CCS# 3857064 Nacho Libre	Pending	12/15/2007	Routine	DED	
05/14/2006	Whitaker, LaVorra	CCS# 3347837 Program Eligibility Change	Pending	07/30/2008	Routine	APPT	
05/10/2006	Paul, Yolonda	CCS# 3268457 Case Status Change	Pending	09/10/2007	Routine	ELDET	
05/05/2006	Paul, Yolonda	Submit Time Sheet	Pending	07/05/2008	Urgent	NA	

The **same** Follow Up will appear as a new item for the assigned user that was removed.

- Inbox (4)
- County
- MEDS
- SAR
- OTHER
- Sent Items
- Recycle Bin
- Pending Follow Ups (1)

Figure 3-28, Notify Removed User

Web Follow-up

When the formerly-assigned user opens the Follow-up, the system sets focus on a confirmation message indicating the user has been removed from the Follow-up. Click 'OK' to complete the removal process as shown in Figure 3-29.

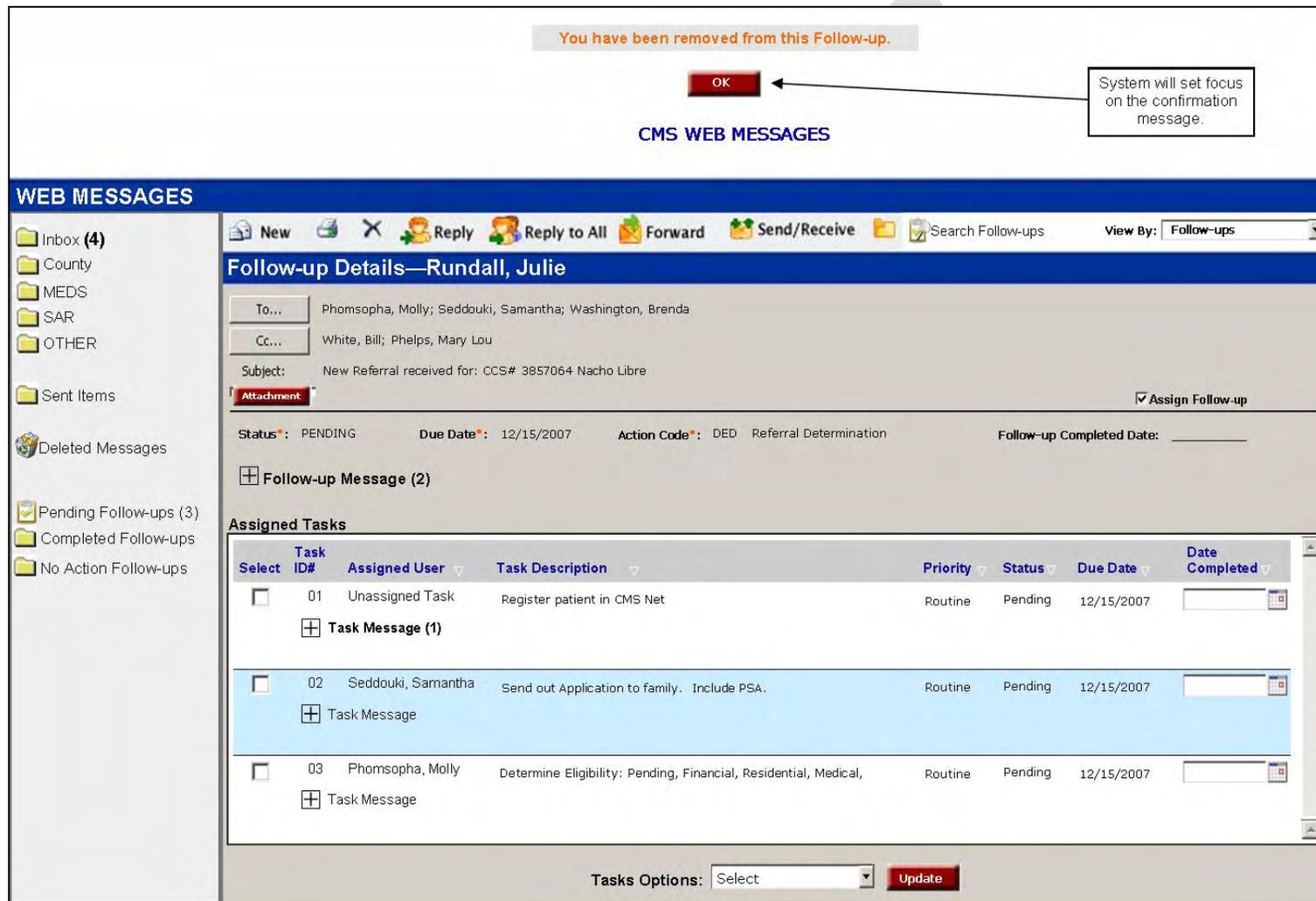


Figure 3-29, Former Assigned User Confirms Removal

This process confirms that the former user is aware that he/she was removed from the Follow-up. After removal, there is no association or tracking method to know that the former assigned user was involved with the Follow-up.

3.9 COMPLETE TASK

An Assigned user can complete a task by entering a valid date in the 'Date Completed' field as shown in Figure 3-30. Click 'Update' to save the changes.

WEB MESSAGES

Inbox (4)
County
MEDS
SAR
OTHER
Sent Items
Deleted Messages
Pending Follow Ups
Completed Follow Ups
No Action Follow Ups

New Reply Reply to All Forward Send/Receive Search Follow Ups / Tasks View By: Follow Ups

Follow Up Details—Washington, Brenda

To: Phomsopha, Molly; Seddouki, Samantha; Washington, Brenda
Cc: White, Bill; Phelps, Mary Lou
Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow Up

Status: PENDING Due Date: 12/15/2007 Action Code: DED Referral Determination Follow Up Date Completed:

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Washington, Brenda	Register patient in CMS Net	Routine	Pending	12/15/2007	12/12/2007
+ Task Message							
<input type="checkbox"/>	02	Seddouki, Samantha	Send out Application to family. Include PSA.	Routine	Pending	12/15/2007	
+ Task Message (1)							
<input type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential, Medical,	Routine	Pending	12/15/2007	
+ Task Message (1)							

Tasks Options: Select Update

Figure 3-30, Change Task Status to Complete

Web Follow-up

Once the screen is updated, the status of the task is changed to 'Complete' and a task message detailing the completion is sent to the task message thread as shown in Figure 3-31.

WEB MESSAGES

Inbox (4)
County
MEDS
SAR
OTHER
Sent Items
Deleted Messages
Pending Follow Ups (1)
Completed Follow Ups
No Action Follow Ups

New Reply Reply to All Forward Send/Receive Search Follow Ups / Tasks View By: Follow Ups

Follow Up Details—Washington, Brenda

To: Phomsopha, Molly; Seddouki, Samantha; Washington, Brenda
Cc: White, Bill; Phelps, Mary Lou
Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow Up

Status: PENDING Due Date: 12/15/2007 Action Code: DED Referral Determination Follow Up Date Completed:

+ Follow Up Messages

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Washington, Brenda	Register patient in CMS Net	Routine	Complete	12/15/2007	12/12/2007

- Task Message (1)

Date	Subject	From
12/11/2007	+ Task Added	Rundall, Julie
12/11/2007	+ Task Unassigned	Rundall, Julie
12/11/2007	+ Task Assigned	Rundall, Julie
12/12/2007	+ Task Complete	Washington, Brenda

02 Seddouki, Samantha Send out Application to family. Include PSA. Routine Pending 12/15/2007

+ Task Message (1)

03 Phomsopha, Molly Determine Eligibility: Pending, Financial, Residential, Medical, Routine Pending 12/15/2007

+ Task Message (1)

Tasks Options: Select Update

Figure 3-31, Task Completed

3.10 DELETE TASK

Requestors can delete any task of the Follow-up. Use the check box to select the tasks then select the delete task option from the 'Task Options' drop down list as shown in Figure 3-32. The system displays a confirmation message before the task is deleted.

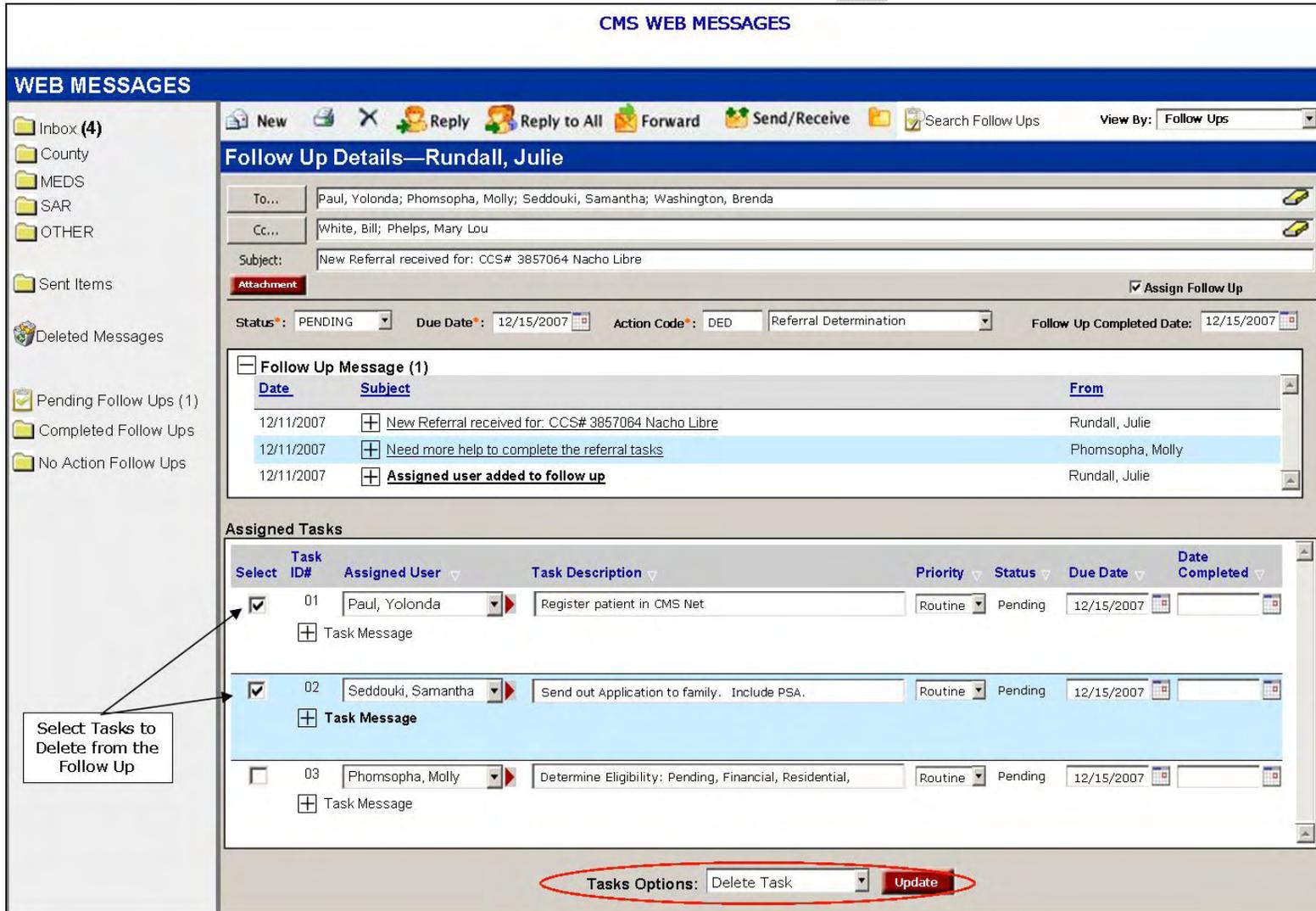


Figure 3-32, Select Tasks to Delete

Web Follow-up

Once the task is deleted, the system will send a *follow-up message* to the follow-up message thread to only the assigned user of that task for each task that is deleted as shown in Figure 3-33.

CMS WEB MESSAGES

WEB MESSAGES

Inbox (4)
County
MEDS
SAR
OTHER
Sent Items
Completed Follow Ups
No Action Follow Ups

New Reply Reply to All Forward Send/Receive Search Follow Ups View By: Follow Ups

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha; Washington, Brenda
Cc... White, Bill; Phelps, Mary Lou
Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow Up

Status*: PENDING Due Date*: 12/15/2007 Action Code*: DED Referral Determination Follow Up Completed Date: 12/15/2007

Follow Up Message (2)

Date	Subject	From
12/11/2007	+ New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	+ Need more help to complete the referral tasks	Phomsopha, Molly
12/11/2007	+ Assigned user added to follow up	Rundall, Julie
12/12/2007	+ Deleted Task 01: Register patient in CMS Net	Rundall, Julie
12/12/2007	+ Deleted Task 02: Send out Application to family. Include PSA	Rundall, Julie

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential, Medical,	Routine	Pending	12/15/2007	
<input type="checkbox"/>			+ Task Message				

Tasks Options: Delete Task Update

The system send a follow up message when each task is deleted.

Task 03 is the only remaining

Figure 3-33, System Follow-up message when Task is deleted.

3.11 TASK MESSAGE TEMPLATE

Listed below is an example of a task message template sent after each task field is updated. The example below will appear in the body of the task message. The text in brackets [] tracks the previous value of the task field if it was changed.

Task #:	01	
Assigned User:	Paul, Yolonda (Sacramento)	[was Washington, Brenda (Orange)]
Task Description:	Register in CMS Net	[was Register in Child-Watch]
Priority:	Routine	
Status:	Pending	
Due Date:	12/10/2007	
Date Completed:	12/09/2007	

Below is the list of events that will trigger the system to send a task message to the task message thread with the corresponding subject line listed on the right column.

Task Object Event Updates

Subject Lines

- | | |
|--|----------------------------|
| 1. New user is assigned to a task | Task Assigned / Reassigned |
| 2. Task is unassigned | Task Unassigned |
| 3. Task Description updated | Task Description Updated |
| 4. Priority changed to 'Urgent' | Task Priority Escalated |
| 5. Priority changed to 'Routine' | Task Priority Lowered |
| 6. Due Date is changed | Task Due Date Updated |
| 7. Date entered in Date Completed field | Task Completed |
| 8. Date removed from Date Complete field | Task Restored |
| 9. Task Deleted | Deleted Task |

If multiple fields are updated at once, the system will concatenate the subject lines in the order listed above.

3.12 SEND FOLLOW-UP OR TASK MESSAGE TO USERS

A message can be sent as a follow-up or task message by using the 'Send Message' option on the task options drop-down list. By default, the message type will be a follow-up message. The message type can be changed to a task message by selecting a task in regards to the new message.

In the example, Figure 3-34, a follow-up message will be created.

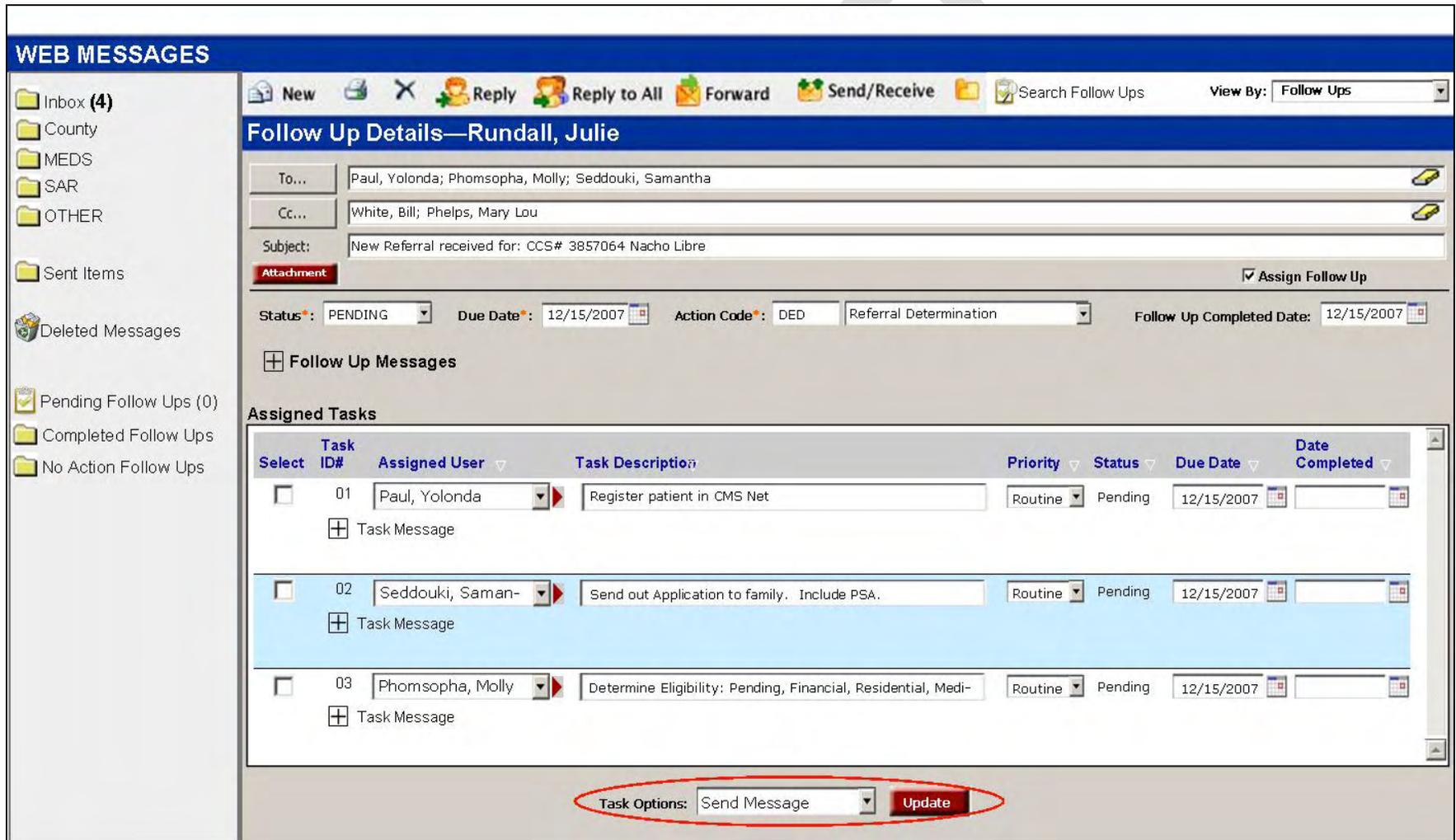


Figure 3-34, Send Follow-up or Task Message

Web Follow-up

Once the 'Send Message' option is selected, the system will display a pop-up screen of a new Web Message screen. For follow-up messages, the system will automatically include the Assigned and Notified users in 'To:' and 'Cc:' fields respectively. For task messages, the system will only include the Assigned user of that task.

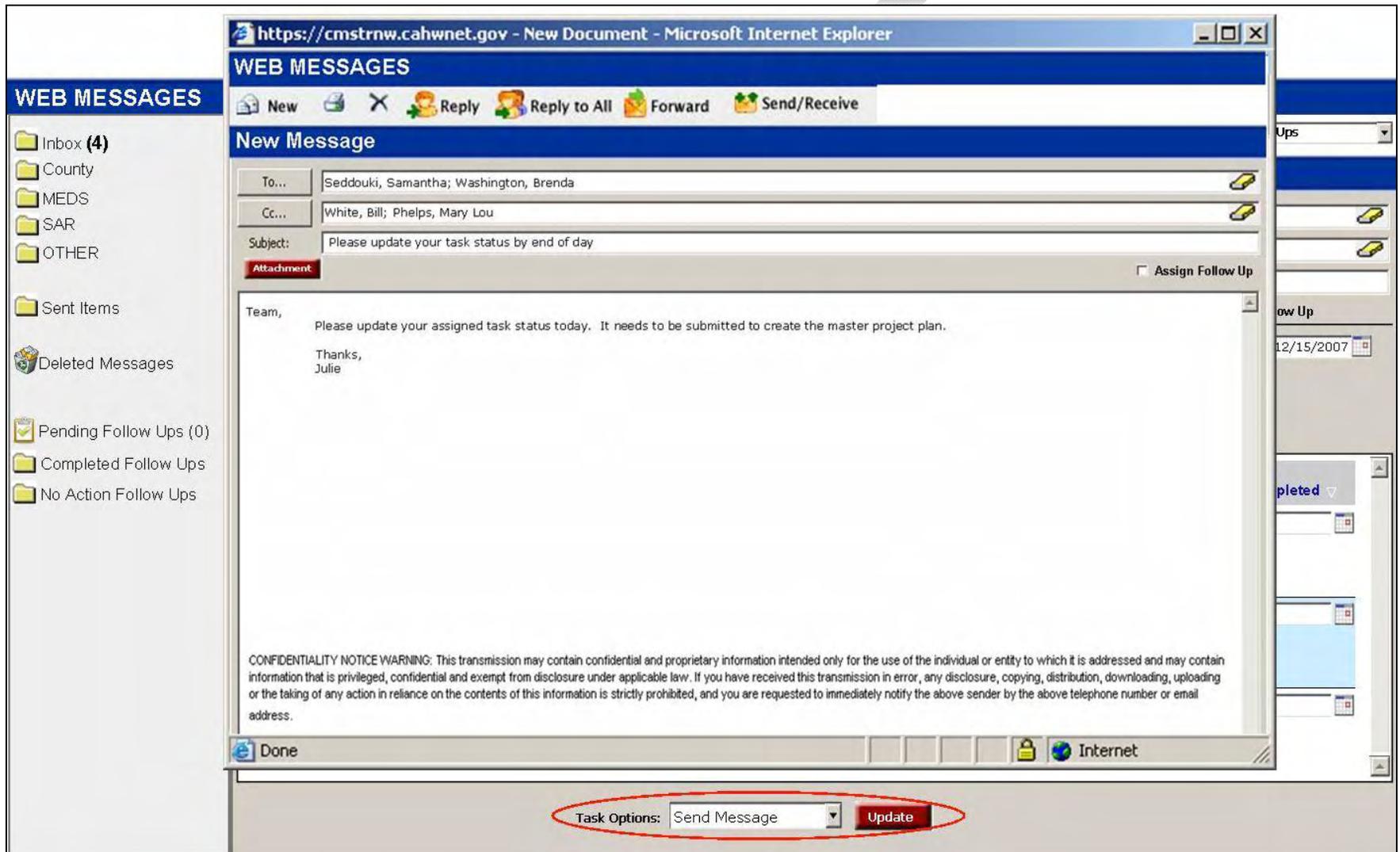


Figure 3-35, Create Follow-up Message

Additional users not involved with the follow-up can be recipients but the message will only appear in their Web Message Inbox.

Web Follow-up

After the message is sent, it will appear as a new follow-up message entry in the follow-up message thread as displayed in Figure 3-36.

By default, the system sends all messages as a follow up message if a task was not selected before selecting the 'Send Message' option

WEB MESSAGES

New Reply Reply to All Forward Send/Receive Search Follow Ups View By: Follow Ups

Follow Up Details—Rundall, Julie

To... Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha; Washington, Brenda

Cc... White, Bill; Phelps, Mary Lou

Subject: New Referral received for: CCS# 3857064 Nacho Libre

Attachment Assign Follow Up

Status*: PENDING Due Date*: 12/15/2007 Action Code*: DED Referral Determination Follow Up Completed Date: 12/15/2007

Follow Up Message (3)

Date	Subject	From
12/11/2007	New Referral received for: CCS# 3857064 Nacho Libre	Rundall, Julie
12/11/2007	Need more help to complete the referral tasks	Phomsopha, Molly
12/11/2007	Assigned user added to follow up	Rundall, Julie
12/12/2007	Deleted Task 01: Register patient in CMS Net	Rundall, Julie
12/12/2007	Deleted Task 02: Send out Application to family. Include PSA	Rundall, Julie
12/12/2007	Please provide a status update	Rundall, Julie

Assigned Tasks

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Pending	12/15/2007	
+ Task Message							
<input type="checkbox"/>	02	Seddouki, Saman-	Send out Application to family. Include PSA.	Routine	Pending	12/15/2007	
+ Task Message							
<input type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential, Medi-	Routine	Pending	12/15/2007	
+ Task Message							

Task Options: Send Message Update

Figure 3-36, Follow-up Message displays on Message Thread

3.13 COMPLETE FOLLOW-UP BY REQUESTOR

A requestor can change the status of the Follow-up to 'Complete' or 'No Action' at anytime regardless of whether there are incomplete assigned Follow-ups. Figure 3-37 displays a confirmation message to complete the Follow-up even though there are unfinished tasks by the assigned and notified users. Select 'Yes' to continue or 'No' to cancel.

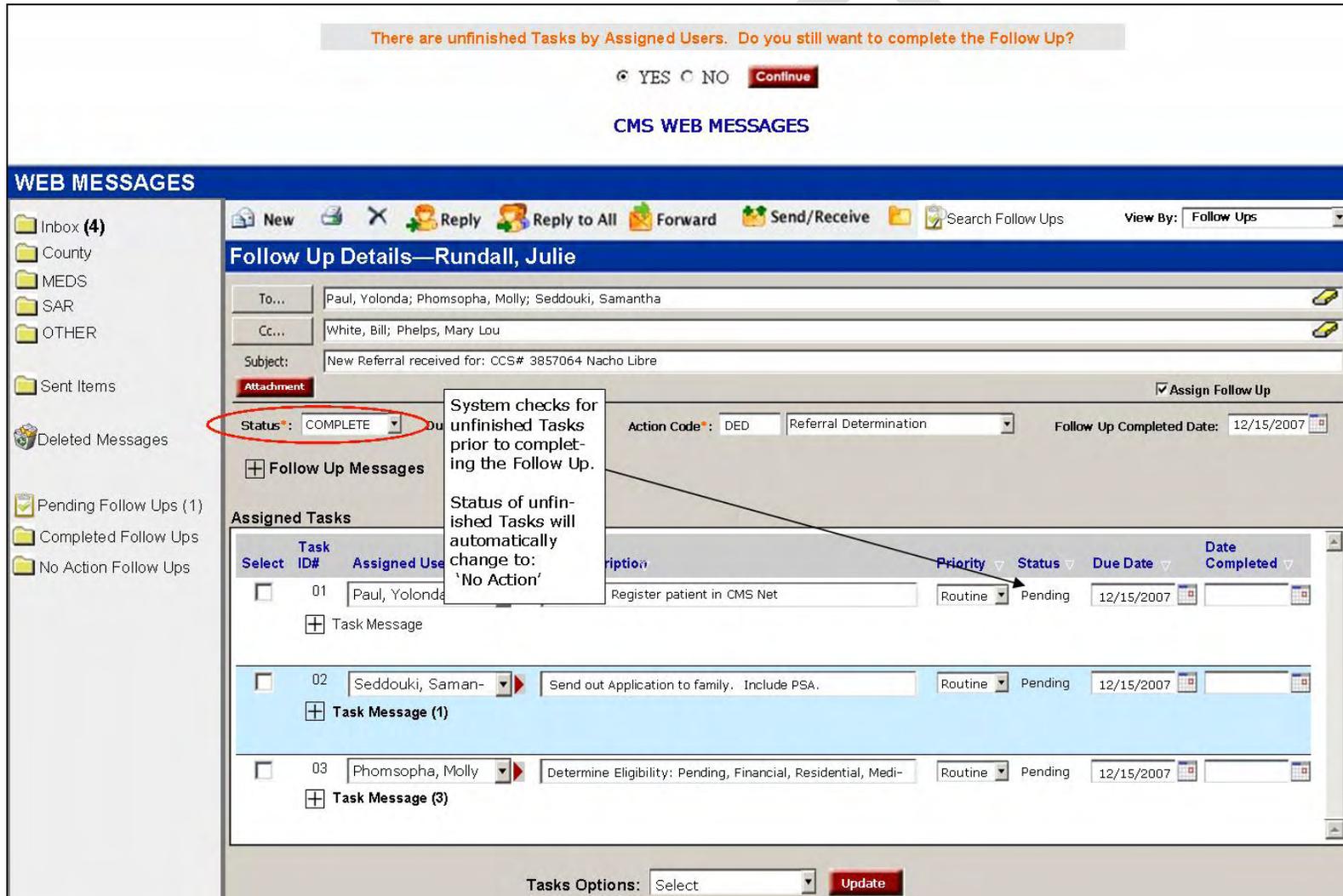


Figure 3-37, Requestor Complete the Follow-up

Web Follow-up

When the Requestor completes the Follow-up, the system marks the Follow-up as new for all the Assigned and Notified Users as displayed in Figure 3-33. Notice, there's also a completed date.

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization | Tuesday, May 16, 2006

Children's Medical Services

Caring for Children with Special Medical Needs...

CCS Modules | Provider | Reports | Administration | View My: Follow Ups (1) OK

CMS WEB MESSAGES

WEB MESSAGES

New | Reply | Reply to All | Forward | Send/Receive | Search Follow Up / Tasks | View By: Follow Ups

FOLLOW UPS for Washington, Brenda

ENTERED	REQUESTOR	SUBJECT	STATUS	DUE DATE	PRIOR-ITY	ACTION CODE	COMPLETED DATE
12/11/2007	Rundall, Julie	New Referral received for: CCS# 3857064 Nacho Libre	Complete	12/15/2007	Routine	DED	12/05/2007

Inbox (4)
County
MEDS
SAR
OTHER
Sent Items
Recycle Bin
Follow Ups (1)

The same Follow Up will appear as a new item for all the involved users.

Figure 3-38, Follow-ups are marked as New after completion

Web Follow-up

The system sets focus on the confirmation message about the completed Follow-up as displayed in Figure 3-39. The system has changed the status of all pending tasks to 'No Action'. Click 'OK' to confirm the completed Follow-up. The system will return to the user's follow-up list and the completed follow-up will be removed.

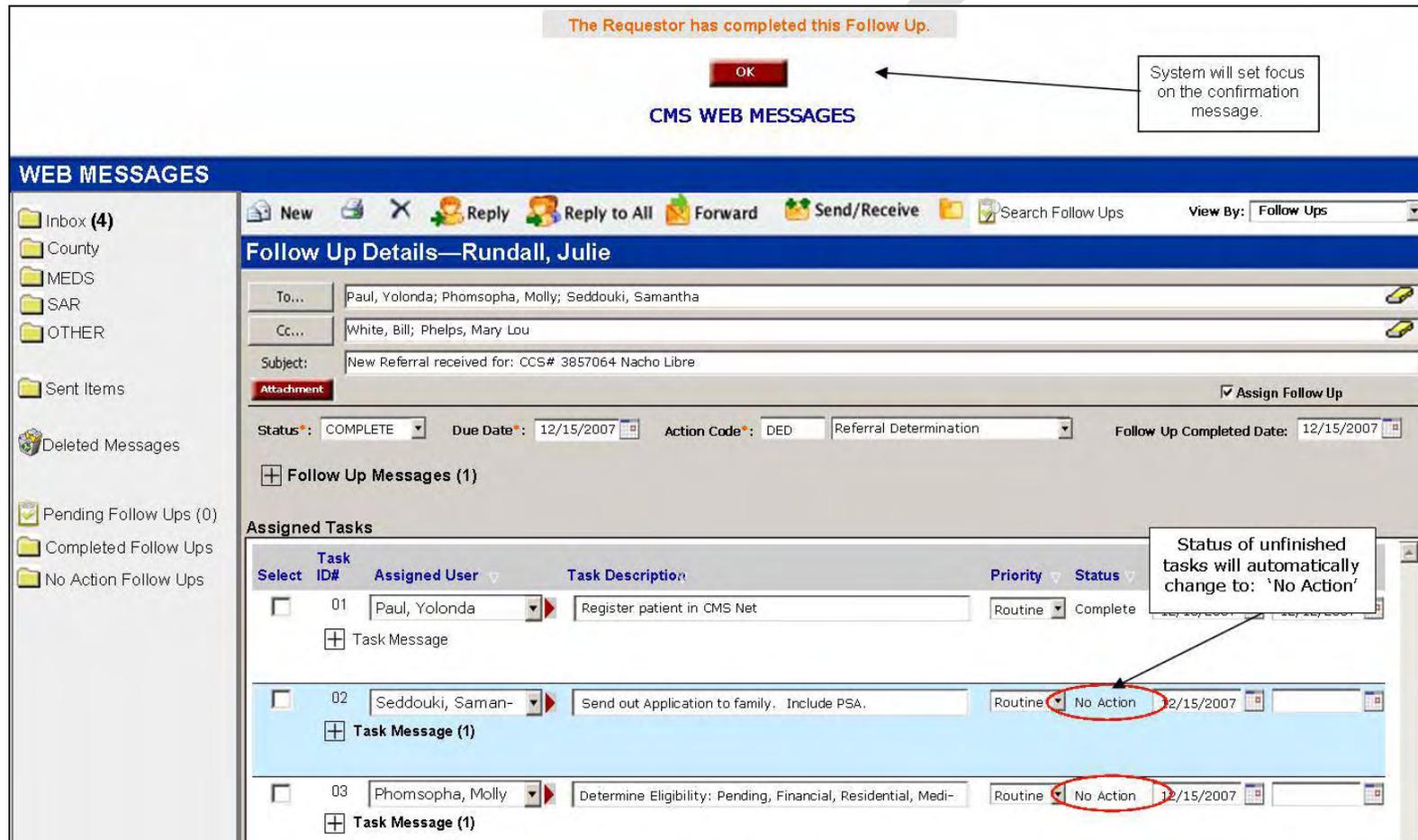


Figure 3-39, Confirm Follow-up Completion

If the follow-up status is changed to complete, the follow-up will be moved to 'Completed Follow-ups' folder. If the status is 'No Action' it will be moved to the 'No Action Follow-ups' folder. If the follow-up is restored back to a pending status, the system will move it back to the 'Pending Follow Ups' folder. The rules just mentioned will apply to Assigned and Notified users and their assigned tasks.

3.14 RESTORE FOLLOW-UP

If a follow-up status is complete or has no action, it can be changed to pending by the Requestor or State system administrator. Click on either the 'Completed Follow-ups' or 'No Action Follow-ups' folder as shown in Figure 3-40.

The screenshot shows the 'Children's Medical Services' web application. At the top, there are navigation links for 'California Home', 'CDHS Home', 'CDHS Comments', 'CDHS Search', and 'CDHS Organization'. The date 'Tuesday, May 16, 2006' is displayed in the top right. The main header includes the site name and tagline, along with 'Contact Us', 'Help', and 'Logout' links. Below this is a navigation bar with 'CCS Modules', 'Provider', 'Reports', and 'Administration'. A 'View My:' dropdown menu is set to 'Follow Ups (0)' with an 'OK' button.

The main content area is titled 'CMS WEB MESSAGES'. Below this is a 'WEB MESSAGES' section with a toolbar containing icons for 'New', 'Reply', 'Reply to All', 'Forward', and 'Send/Receive', along with a search box for 'Follow Ups / Tasks' and a 'View By:' dropdown set to 'Follow Ups'.

The left sidebar shows a folder tree with 'Inbox (4)', 'County', 'MEDS', 'SAR', 'Other', 'Sent Items', 'Deleted Items', 'Pending Follow Ups (0)', 'Completed Follow Ups' (highlighted with a red circle), and 'No Action Follow Ups'. A tooltip points to the 'Completed Follow Ups' folder with the text: 'Click to display all the completed follow ups for the current user.'

The main area displays a table titled 'Follow Ups for Julie Rundall' with the following data:

Entered	Requestor	Follow Up Description	Status	Due Date	Priority	Action Code	Completed
05/14/2007	Whitaker, LaVorra	Financial Eligibility	Pending	07/30/2008	Routine	APPT	
05/10/2007	Rundall, Julie	Deny Request for Service	Pending	09/10/2007	Routine	PREQ	
05/05/2007	Rundall, Julie	Submit Time Sheet	Pending	07/05/2008	Urgent	NA	
05/05/2007	White, Bill	User Group Meeting 11-10-2007	Pending	11/01/2007	Routine	PEND	
05/05/2007	Rhodes, Mary Lou	Transfer to new CCS County	Pending	12/01/2007	Routine	XFR	
05/05/2007		Appointment	Pending	12/15/2007	Routine	APPT	

Figure 3-40, Search for Completed Follow-ups to restore

Web Follow-up

Figure 3-41 displays the list of completed follow-ups for the Requestor. The system displays 'Completed Follow-ups' in red bold text to help identify to the user that they're working the folder of completed follow-ups. Similarly, the system will display 'No Action Follow-ups' when the user is in the folder of no action follow-ups. Click on the subject hyperlink to open the completed follow-up.

Children's Medical Services
Caring for Children with Special Medical Needs...

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization | Tuesday, May 16, 2006

Contact Us | Help | Logout

CCS Modules | Provider | Reports | Administration | View My: Follow Ups (0) OK

CMS WEB MESSAGES

Completed follow ups will be listed in reverse chronological order by entered date.

Completed follow ups indicator

WEB MAIL

Inbox (4)
County
MEDS
SAR
Other
Sent Items
Deleted Items
Pending Follow Ups (0)
Completed Follow Ups
No Action Follow Ups

New | Reply | Reply to All | Forward | Send/Receive | Search Follow Ups / Tasks | View By: Follow Ups

Follow Ups for Julie Rundall **COMPLETED FOLLOW UPS**

Entered	Requestor	Follow Up Description	Status	Due Date	Priority	Action Code	Completed
12/11/2007	Rundall, Julie	New Referral received for: CCS# 3857064 Nacho Libre	Complete	12/15/2007	Routine	DED	12/15/2007
12/01/2007	Rundall, Julie	New Referral received for: CCS# 3726874 Drunkn, Munky	Complete	12/05/2007	Routine	DED	12/05/2007
11/30/2007	Phelps, Mary Lou	FileMan Report of current legacy authorizations	Complete	11/30/2007	Routine	OTHER	11/30/2007
11/15/2007	Rundall, Julie	Business Object ad-hoc—HF client for fiscal 2006-2007	Complete	11/15/2007	Routine	OTHER	11/15/2007
11/01/2007	White, Bill	This Computes 100! revision	Complete	11/02/2007	Urgent	OTHER	11/01/2007
11/01/2007	Rundall, Julie	New Referral received for: CCS# 2876818 Prime, Optimus	Complete	11/05/2007	Routine	DED	12/15/2007

Click to view the completed Follow Up

Figure 3-41, Search for Completed Follow-ups

Web Follow-up

Change the status from 'Complete' to 'Pending' then click the 'Update' button to restore the Follow-up as shown in Figure 3-39. This allows the Requestor to change the status of each of assigned and notified user's Follow-up if necessary. The Follow-up is marked as new for all the Assigned and Notified users.

The screenshot displays the 'CMS WEB MESSAGES' interface. On the left is a navigation pane with folders: 'Inbox (4)', 'County', 'MEDS', 'SAR', 'OTHER', 'Sent Items', 'Deleted Messages', 'Pending Follow Ups (0)', 'Completed Follow Ups', and 'No Action Follow Ups'. The main area is titled 'WEB MESSAGES' and contains a toolbar with icons for 'New', 'Reply', 'Reply to All', 'Forward', 'Send/Receive', and 'Search Follow Ups'. Below the toolbar, the 'Follow Up Details—Rundall, Julie' section shows 'COMPLETED FOLLOW UPS'. The 'To...' field lists 'Paul, Yolonda; Phomsopha, Molly; Seddouki, Samantha' and 'Cc...' lists 'White, Bill; Phelps, Mary Lou'. The 'Subject' is 'New Referral received for: CCS# 3857064 Nacho Libre'. The 'Status' dropdown is currently set to 'COMPLETE' and is circled in red, with 'PENDING' as an option. The 'Due Date' is '12/15/2007', 'Action Code' is 'DED', and 'Referral Determination' is 'Referral Determination'. The 'Follow Up Completed Date' is '12/15/2007'. Below this is a section for 'Assigned Tasks' with a table:

Select	Task ID#	Assigned User	Task Description	Priority	Status	Due Date	Date Completed
<input type="checkbox"/>	01	Paul, Yolonda	Register patient in CMS Net	Routine	Complete	12/15/2007	12/12/2007
<input checked="" type="checkbox"/>	02	Seddouki, Saman-	Send out Application to family. Include PSA.	Routine	No Action	12/15/2007	
<input checked="" type="checkbox"/>	03	Phomsopha, Molly	Determine Eligibility: Pending, Financial, Residential, Medi-	Routine	No Action	12/15/2007	

At the bottom, the 'Task Options' dropdown is set to 'Restore to Pending' and the 'Update' button is visible. A callout box on the left contains the text: 'Restoring tasks is optional when restoring the overall follow up.' with arrows pointing to the 'No Action' status dropdowns in the task table and the 'Update' button.

Figure 3-42, Change Complete Status to Pending to restore Follow-up

Table 3-2, Search Follow-up Screen Data Dictionary

Obj #	Object Name	Type	Req?	Description/Comments
85.	Select Type	9 Alpha Numeric Text	Yes	Select type: 1. Follow-up 2. Task
86.	Date Type (Search Follow-up)	25 Alpha Numeric Drop down list	Yes	Select a date type. Follow-ups have three dates associated with it: -Entry Date -Follow-up Due Date -Follow-up Completed Date
87.	Follow-up Status (Search Follow-up)	7 Alpha Numeric Drop down list	No	Select the overall status of the Follow-up: 1. Pending - The Follow-up is still open and incomplete 2. Complete - The Follow-up is complete. 3. No Action - Used when no action or is needed..
88.	Begin Date (Search Follow-up)	10 Date 99/99/9999	Yes	Defaults to seven days from today's date. (T - 7) Enter the begin date for the date range. Date entered is based on the 'Date Type'
89.	End Date (Search Follow-up)	10 Date 99/99/9999	Yes	Defaults to today's date. Enter the end date for the date range. Date entered is based on the 'Date Type'
90.	Search Patient (Search for Patient)	1 Object Control Button	Yes	Required if no Users have been selected. Click the button to bring up the client search screen. Can select only one patient.
91.	Patient Name (Patient List)	30 Alpha Text box	Display Only	Displays the name of the patient selected.
92.	CCS# (Patient List)	7 Alpha Numeric Text box 9999999	Display Only	Displays the CCS number of the patient selected.
93.	CIN (Patient List)	11 Alpha/Numeric Text box 999999999 A	Display Only	Displays the CIN number of the patient selected.
94.	SSN (Patient List)	11 Numeric Text box 999-99-9999	Display Only	Displays the SSN number of the patient selected.

Web Follow-up

95.	DOB (Patient List)	10 Date 99/99/9999	Display Only	Displays the date of birth number of the patient selected.
96.	Gender (Patient List)	7 Alpha Drop down list	Display Only	Displays the gender number of the patient selected.
97.	Select User	1 Object Control Drop down list	No	Lists the users that have given the current user permission to view their Follow-ups. This is set up in the User Security module. Defaults to the current user's name. Search results display in the same pop-up screen when the selected user is other than the current user.
98.	Find (Search Follow-up)	1 Control Object Button	Optional	Click the 'Find' button to search for the subject line from the subject table screen.
99.	Action Code (Abbreviation)	4 Alpha	Display Only	This field is used to describe the action of the Follow-up using abbreviations. Default value is 'N/A'. Pointer to Action Code table. Uses abbreviation only.
100	Action Code (Drop down list)	60 Alpha Drop down list	Yes	This field is used to describe the action. After selecting an option, the system populates the 'Action Code' field with its corresponding abbreviation code. Default value is 'No further action' Pointer to Action Code table.
101	Search (Search Follow-up)	1 Control Object Button	Yes	Click 'Search' to begin the search for Follow-ups based on the search criteria.

3.15 SEARCH OPTION FOR FOLLOW-UPS

Follow-ups can be searched by date range, type, status, patient, and user. Click the 'Search Follow-ups' icon to display the pop-up search screen as shown in Figure 3-43.

The search by patient option references attachments that are linked to a patient. Attachments are discussed later in this document.

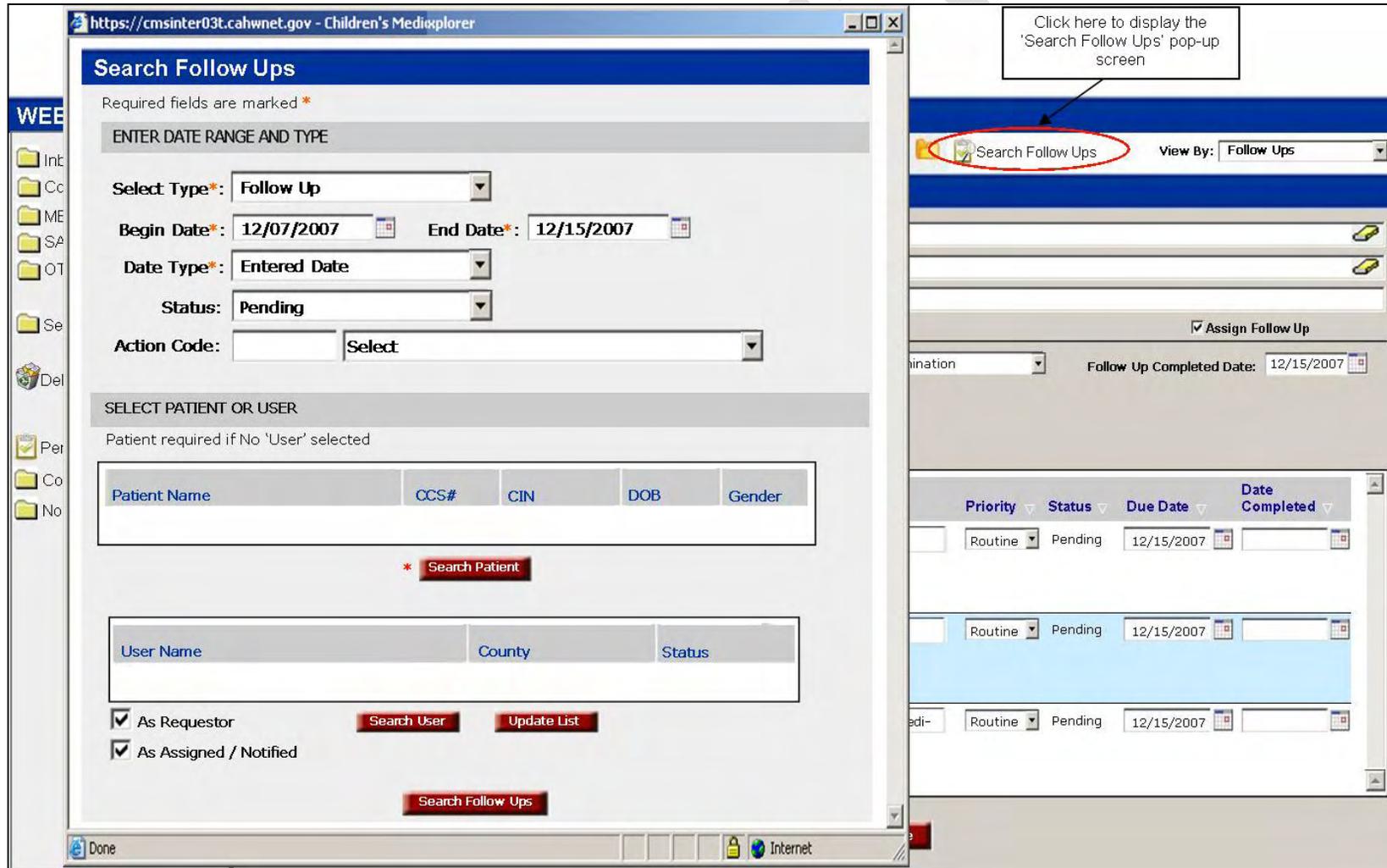
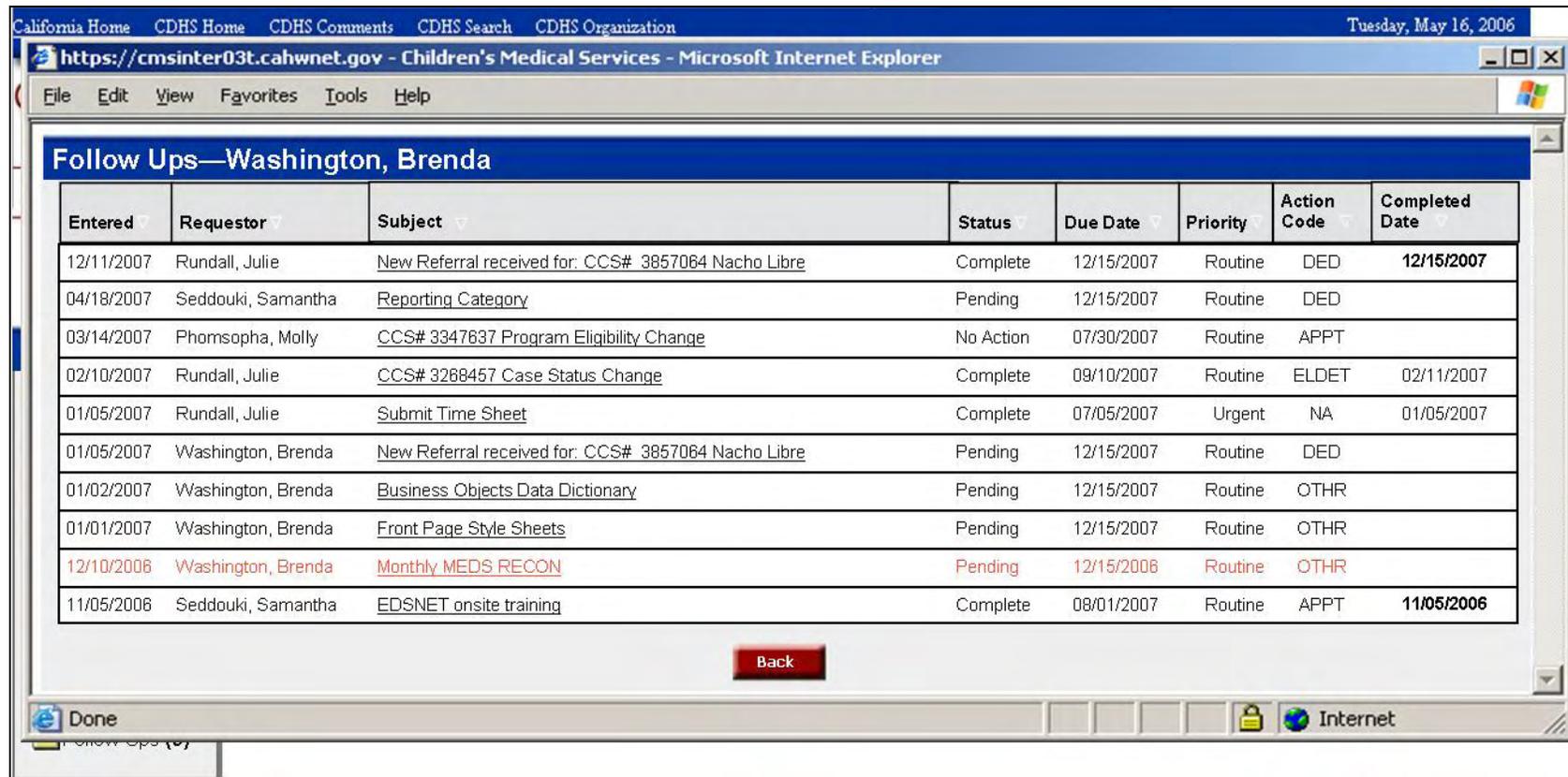


Figure 3-43, Follow-up Search Options

Web Follow-up

The follow-up search results will display in the same pop-up screen as shown in Figure 3-44.



The screenshot shows a Microsoft Internet Explorer browser window displaying search results for 'Follow Ups—Washington, Brenda'. The browser's address bar shows the URL 'https://cmsinter03t.cahwnet.gov - Children's Medical Services - Microsoft Internet Explorer'. The search results are presented in a table with the following columns: Entered, Requestor, Subject, Status, Due Date, Priority, Action Code, and Completed Date. A 'Back' button is visible below the table.

Entered	Requestor	Subject	Status	Due Date	Priority	Action Code	Completed Date
12/11/2007	Rundall, Julie	New Referral received for: CCS# 3857064 Nacho Libre	Complete	12/15/2007	Routine	DED	12/15/2007
04/18/2007	Seddouki, Samantha	Reporting Category	Pending	12/15/2007	Routine	DED	
03/14/2007	Phomsopha, Molly	CCS# 3347837 Program Eligibility Change	No Action	07/30/2007	Routine	APPT	
02/10/2007	Rundall, Julie	CCS# 3288457 Case Status Change	Complete	09/10/2007	Routine	ELDET	02/11/2007
01/05/2007	Rundall, Julie	Submit Time Sheet	Complete	07/05/2007	Urgent	NA	01/05/2007
01/05/2007	Washington, Brenda	New Referral received for: CCS# 3857064 Nacho Libre	Pending	12/15/2007	Routine	DED	
01/02/2007	Washington, Brenda	Business Objects Data Dictionary	Pending	12/15/2007	Routine	OTHR	
01/01/2007	Washington, Brenda	Front Page Style Sheets	Pending	12/15/2007	Routine	OTHR	
12/10/2006	Washington, Brenda	Monthly MEDS RECON	Pending	12/15/2006	Routine	OTHR	
11/05/2006	Seddouki, Samantha	EDSNET onsite training	Complete	08/01/2007	Routine	APPT	11/05/2006

Figure 3-44, Search Results Displayed in Pop Up Screen

3.16 ATTACHMENTS

Attachments can be added to a Web message using the 'Attachment' button as shown in Figure 3-45. The system allows three types of attachments: Patient, Case Notes, and SAR. Correspondence will be added as the fourth option after the Web Correspondence module is complete.

When a search is based on a patient, the system references the attachments that are linked to a patient.

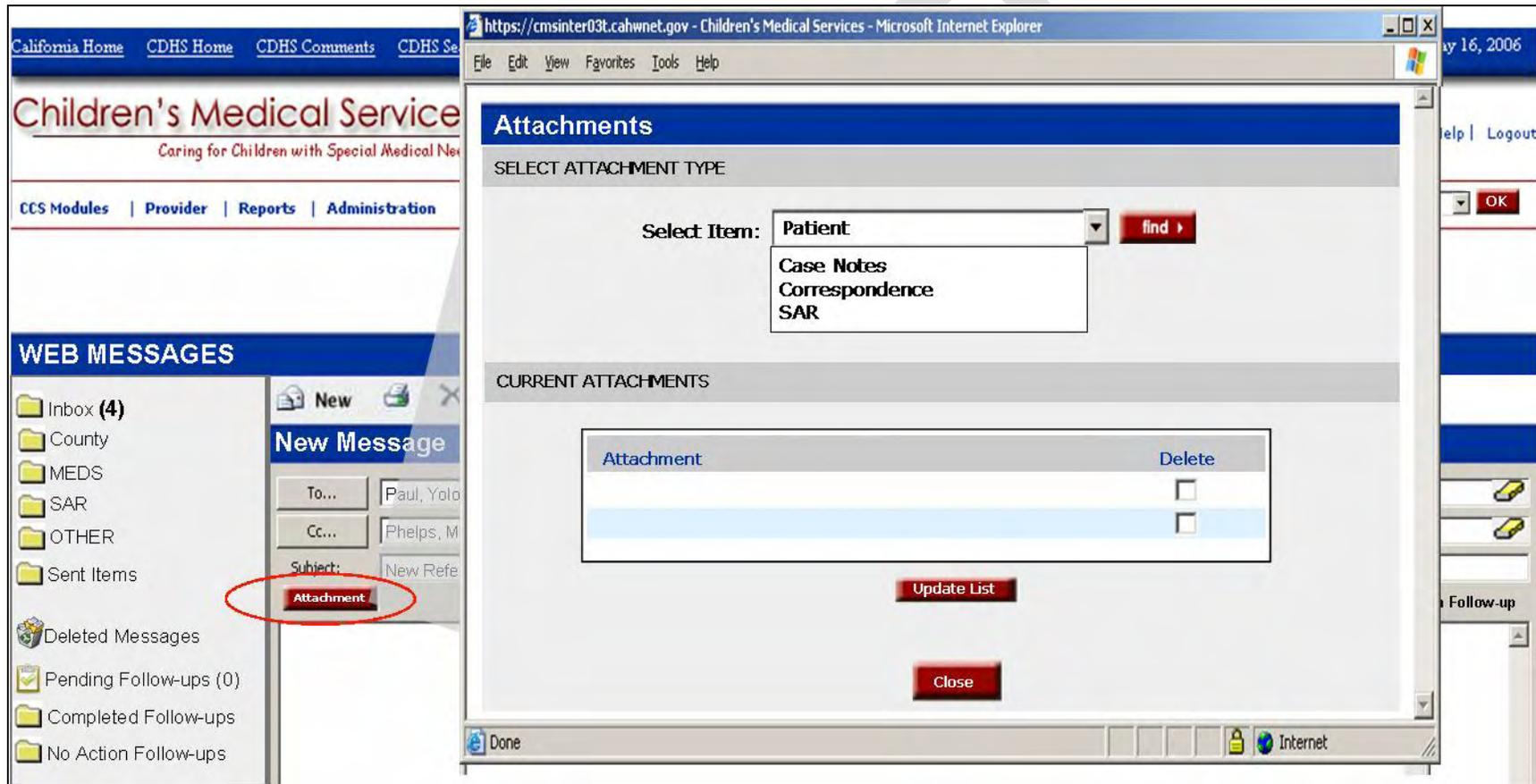


Figure 3-45, Attachments Pop-Up Screen

The attachments pop-up screen is where attachments can be added or removed. It also displays the current attachments for the Web message. Attachments can from different patients.

3.16.1 Attach Patient

Patients can be attached to a Web Message. Attaching a patient displays all the fields in the client header information. Select the 'Patient' option from the drop-down list, then click 'Find'. The system will display the client search screen as shown in Figure 3-46.

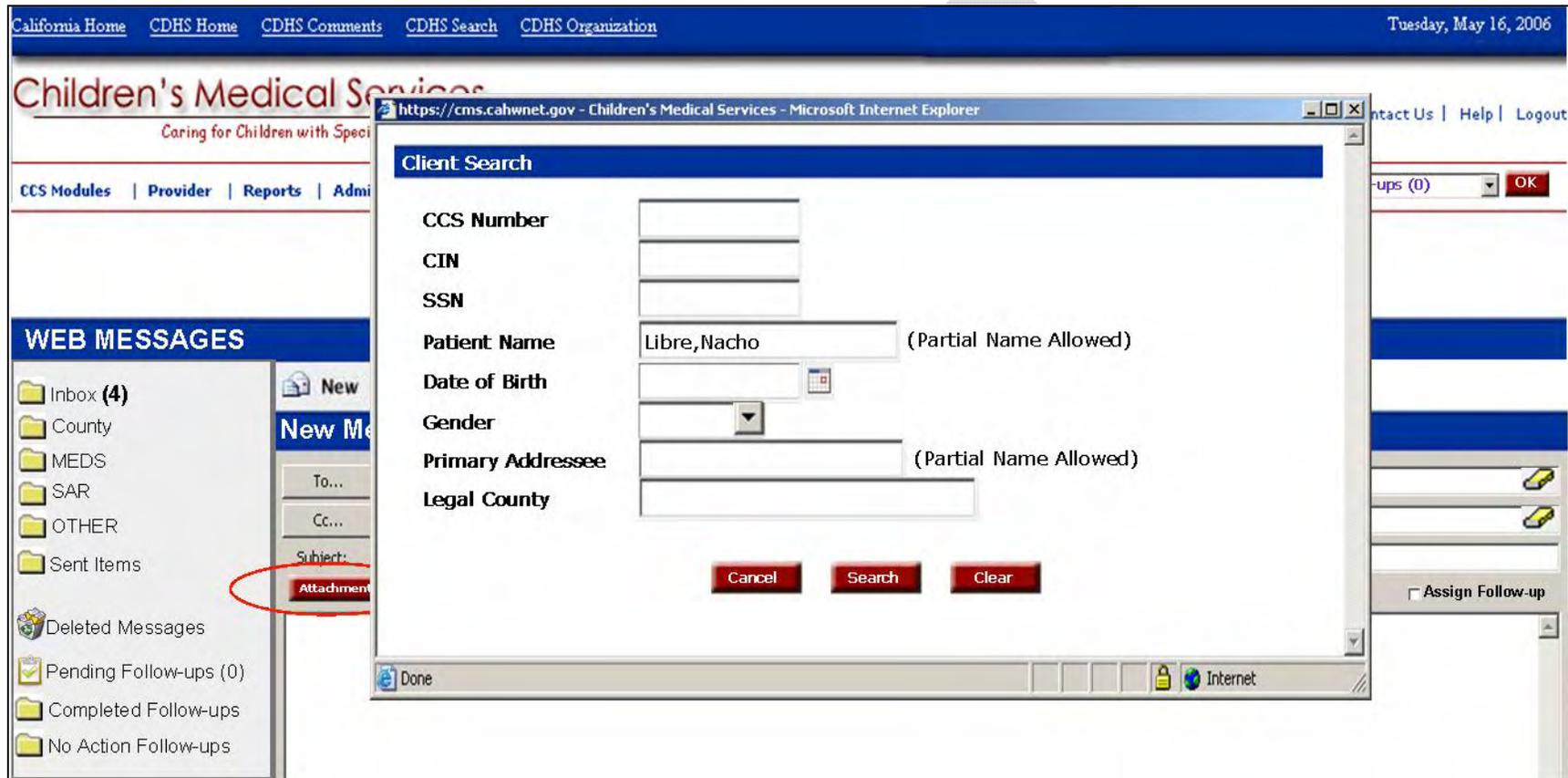


Figure 3-46, Attach Patient

Web Follow-up

Figure 3-47 displays the search results for Nacho Libre. If the patient is not displayed in the search results, click 'Back' to return to the client search screen and use a different search criteria. If the patient is found, click the client name hyperlink to select the patient and the system will refresh (and return) to the attachment list.



Figure 3-47, Select Patient to Attach

Web Follow-up

After the patient is selected, it appears on the current attachment list as a hyperlink as shown in Figure 3-48.

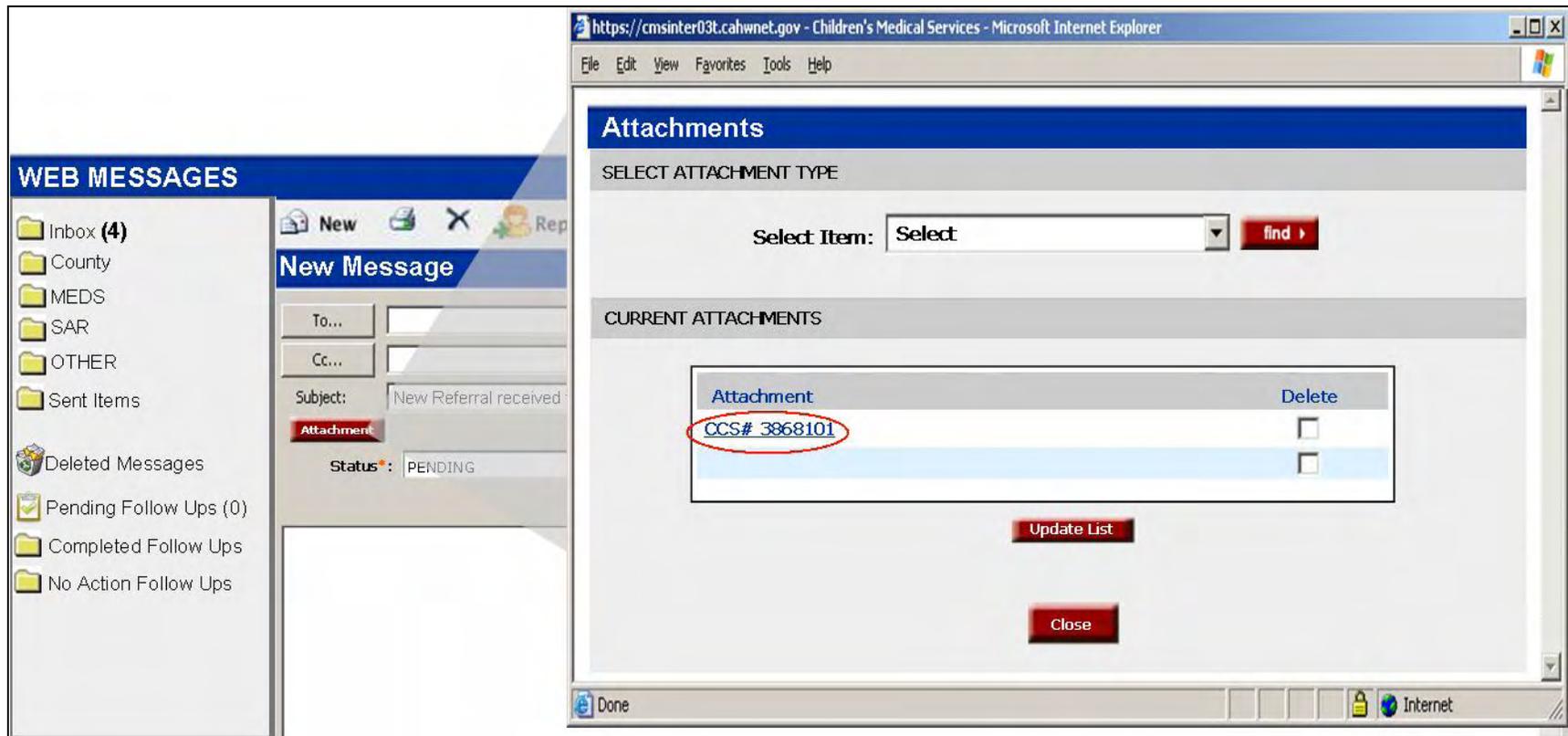


Figure 3-48, Current Attachment Items

Web Follow-up

Figure 3-49 displays the client header information pop up screen when the attachment is clicked.

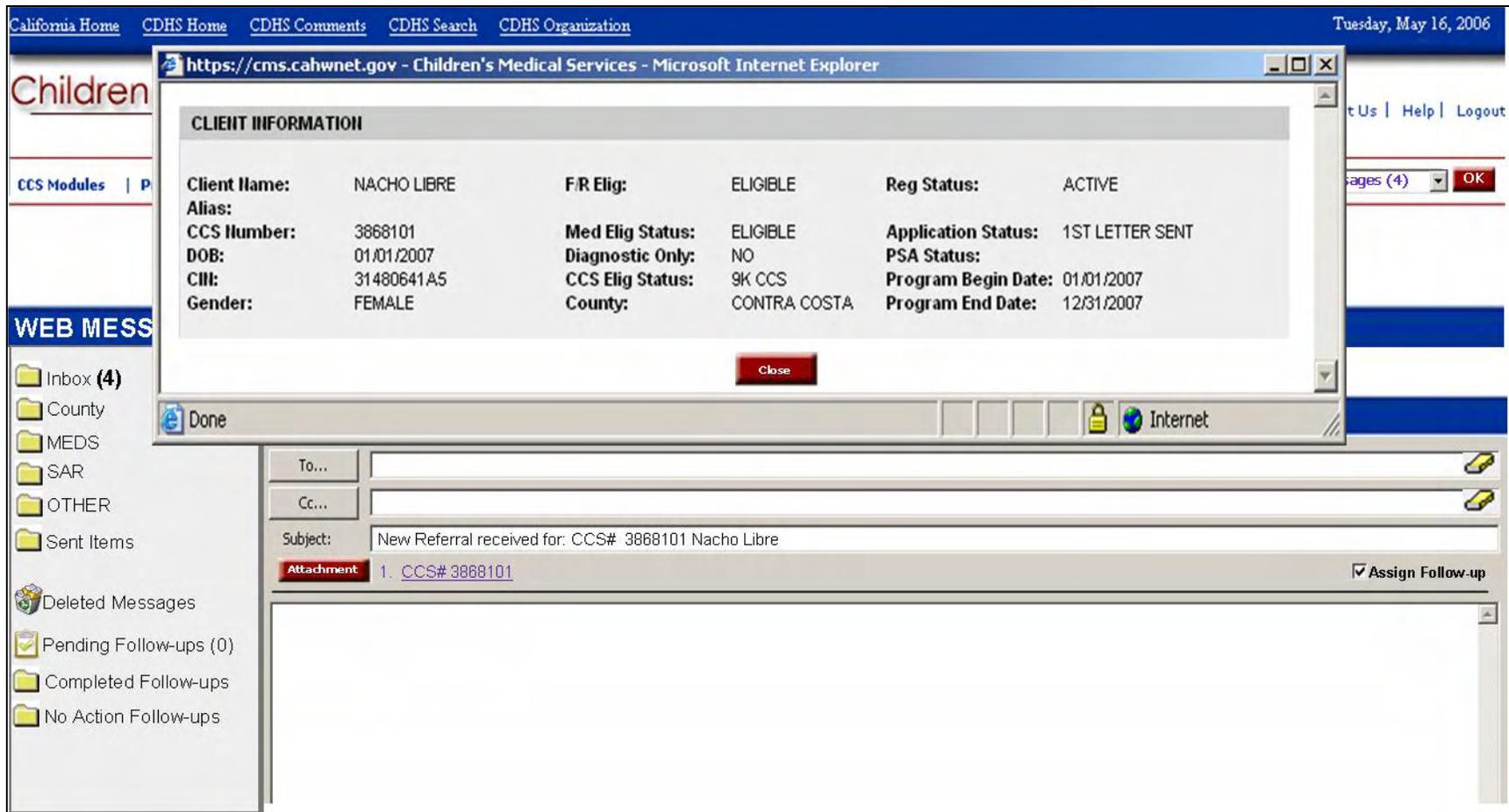


Figure 3-49, Display Patient Attachment

The same steps can be repeated to attach more patients. Attachments are grouped by patients when there are more than one patient.

3.16.2 Attach Case Notes

Case notes can be attached by selecting the 'Case Note' option then clicking the 'Find' button as displayed in Figure 3-50.

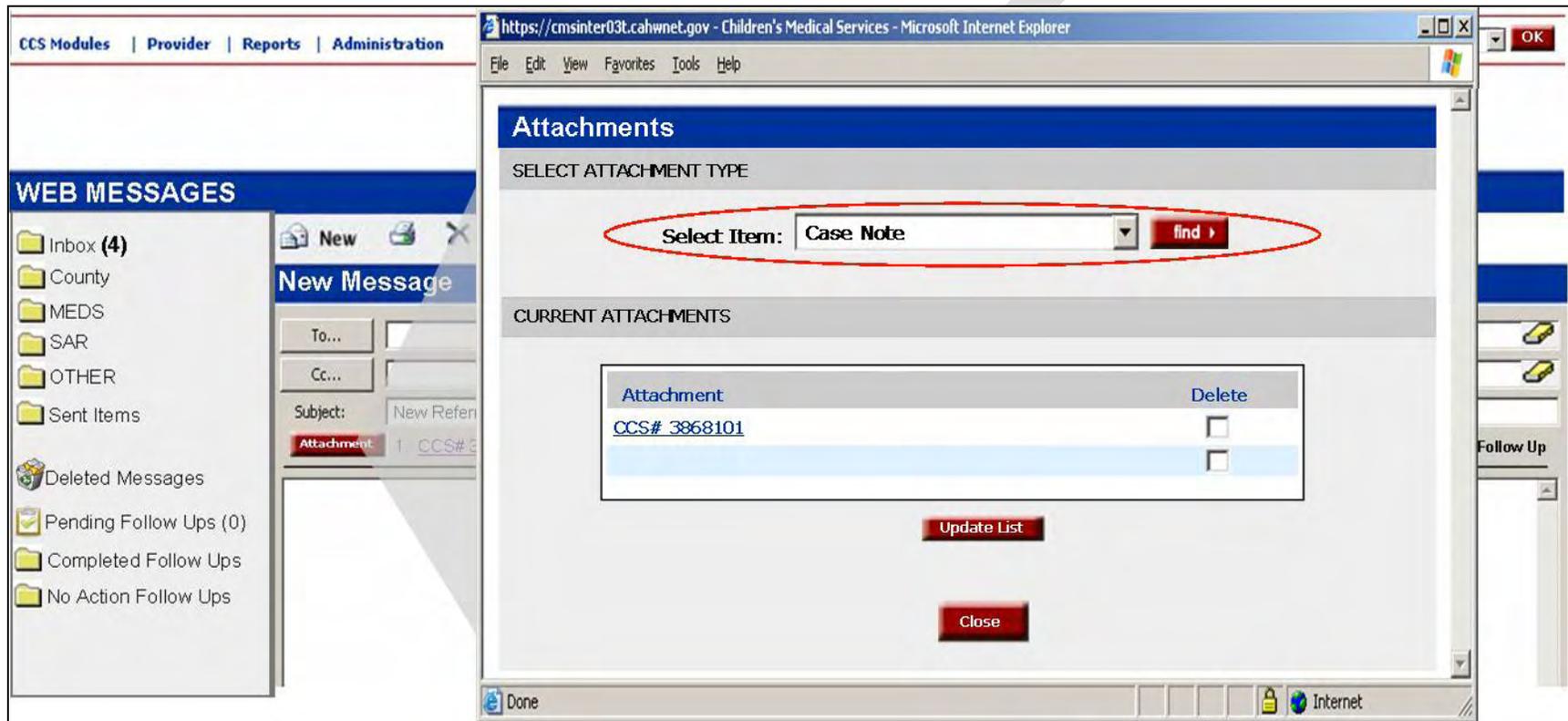


Figure 3-50, Attaching Case Notes

Web Follow-up

The system displays the case notes search screen as shown in Figure 3-51. Enter a search criterion, and then click the 'Search' button. Click 'Clear' to clear all searchable field entries. Click 'Cancel' to return to the attachments screen.

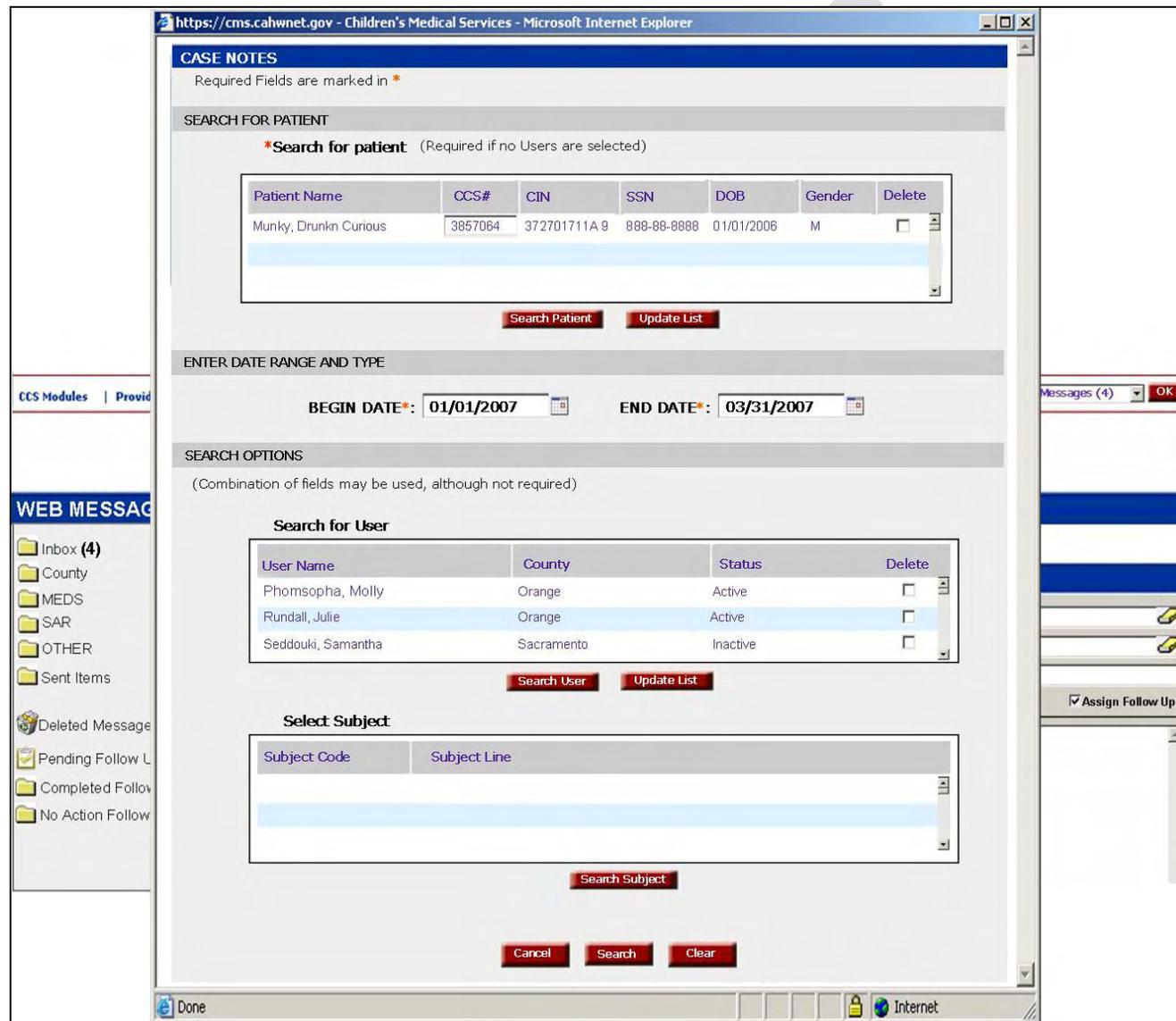


Figure 3-51, Search Case Notes to Attach

Web Follow-up

The search result for case notes is shown in Figure 3-52. Use the check box to select the case note to be the attachment then click the 'Select' button. Click the 'View' button to view the selected case notes. Click the 'Back' button to return to the case notes search screen.

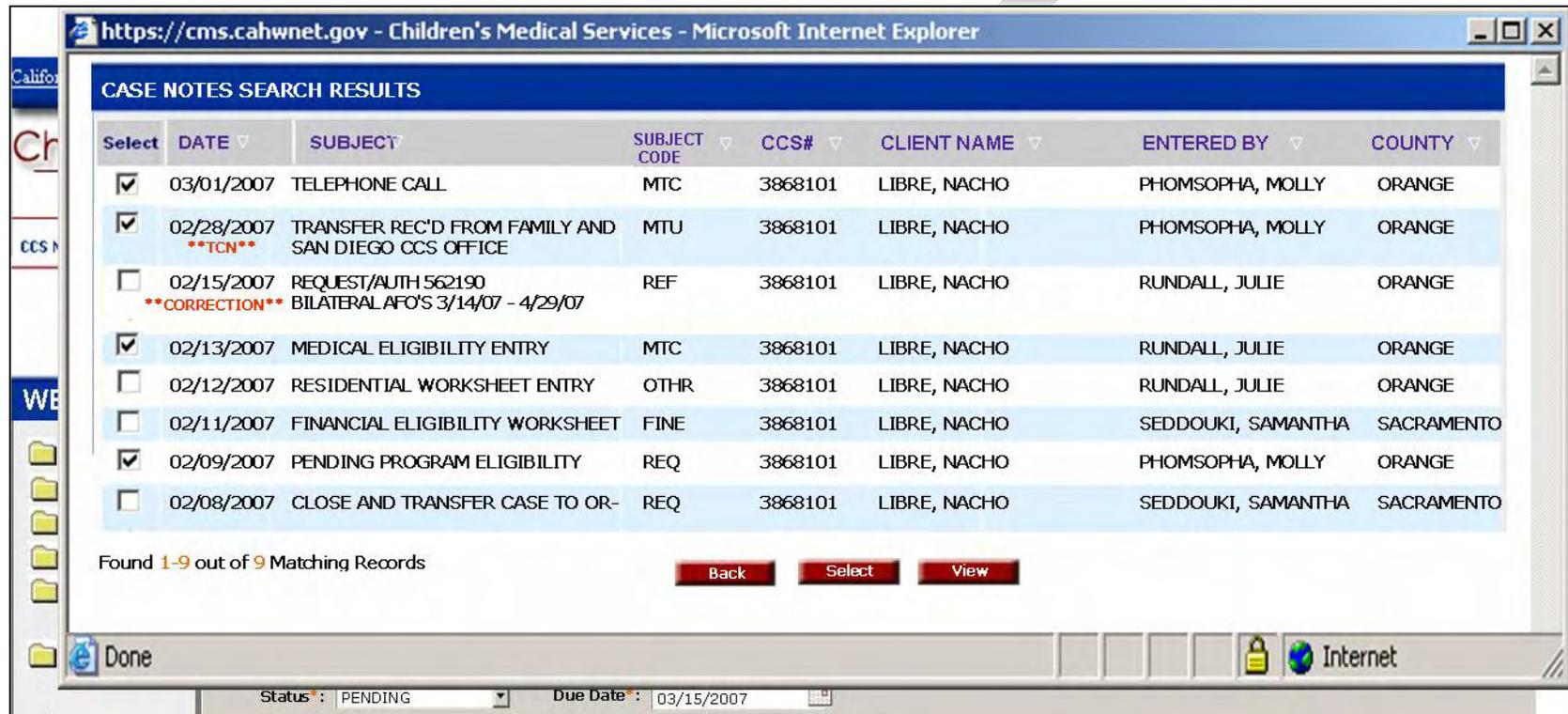


Figure 3-52, Select Case Notes to Attach

Figure 3-53 shows the added case notes as attachments on the attachment pop up screen.

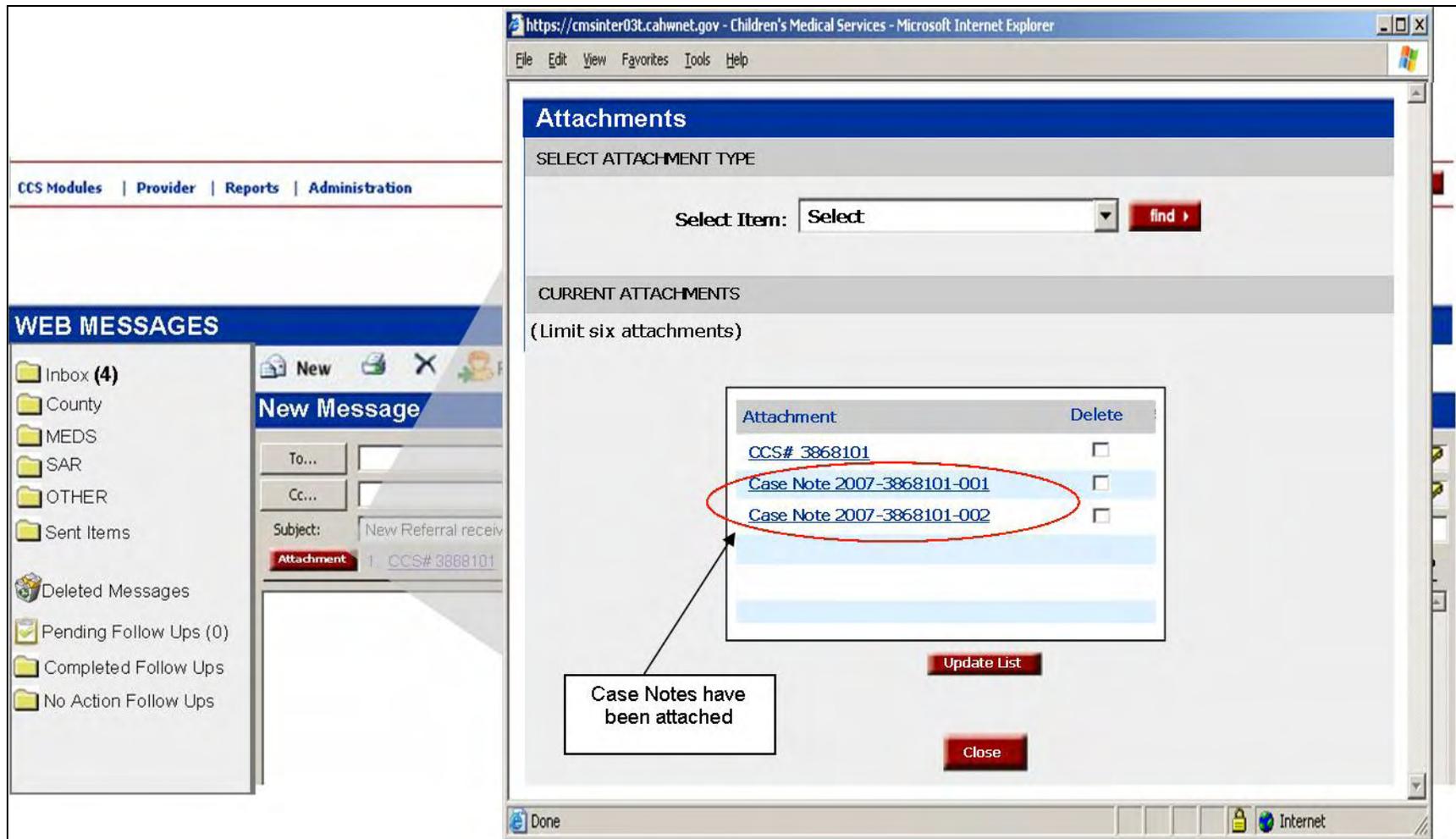


Figure 3-53, Case Notes as Attachments

Figure 3-54 shows a case note attachment item as displayed when the attachment hyperlink is clicked.

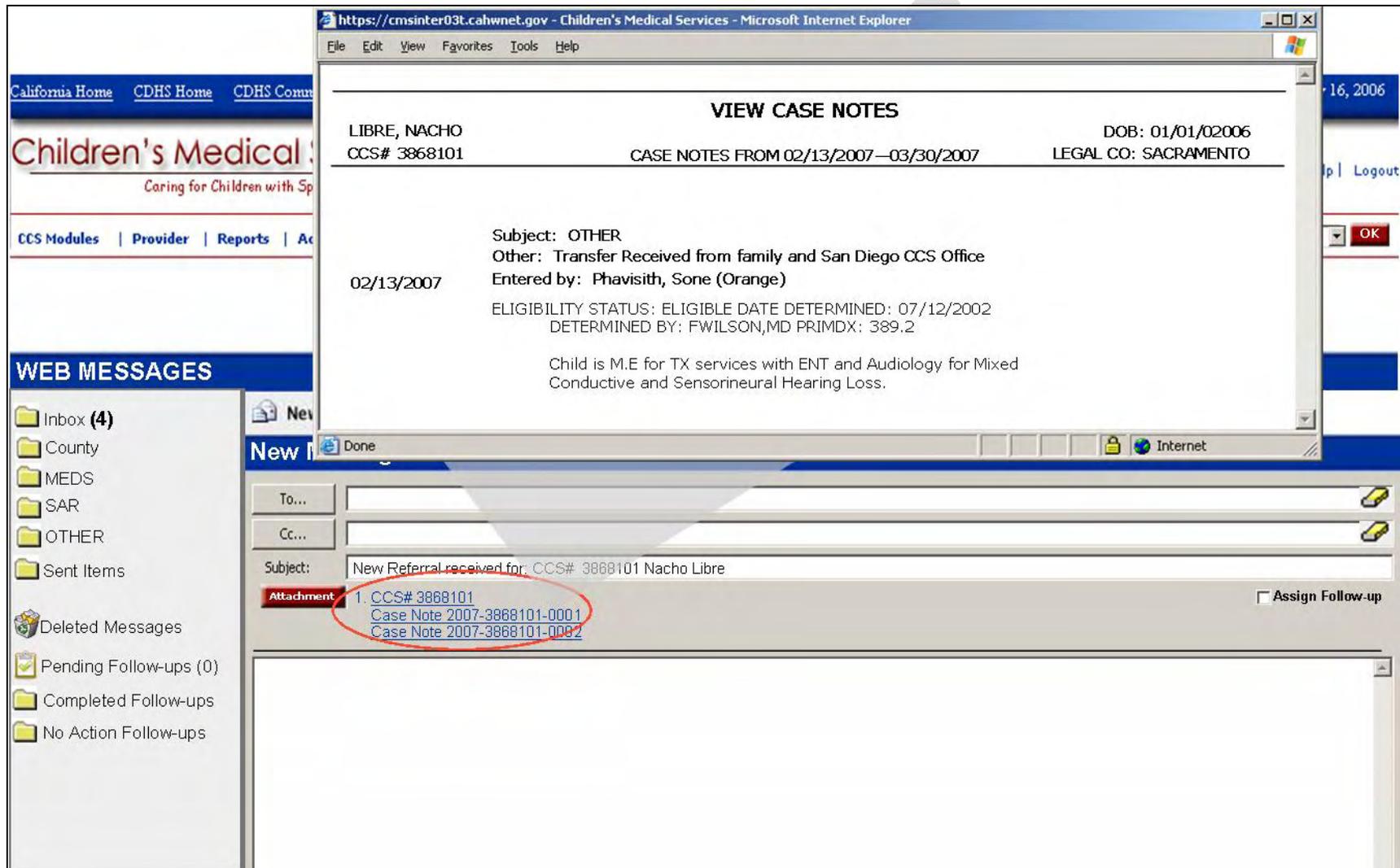


Figure 3-54, Display Case Note Attachment

3.16.3 Attach SAR

Select the 'SAR' option on the attachment pop up screen as shown in Figure 3-55.

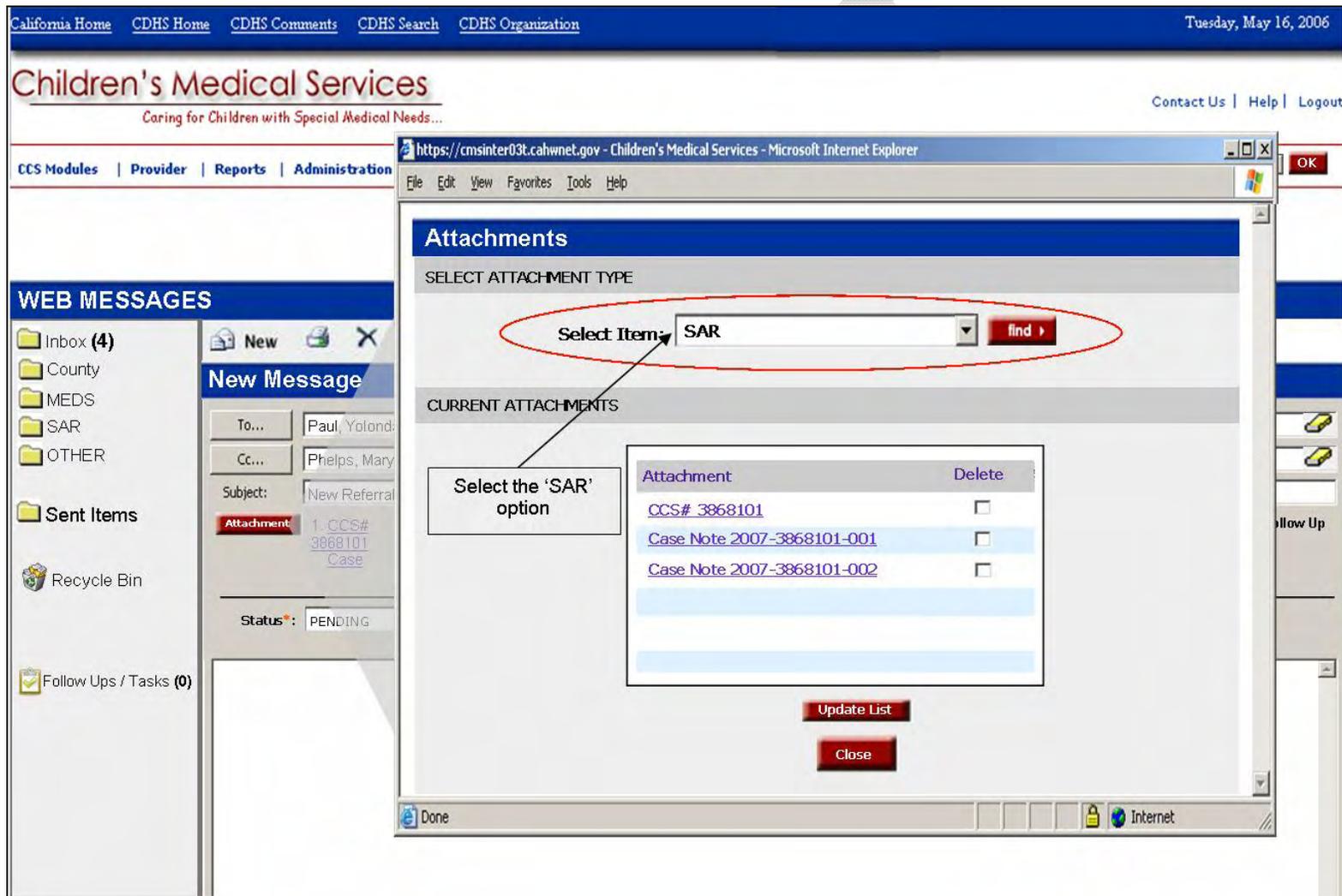


Figure 3-55, Attach SAR

The SAR search screen will appear as shown in Figure 3-56. Enter a search criteria to search for the SAR.

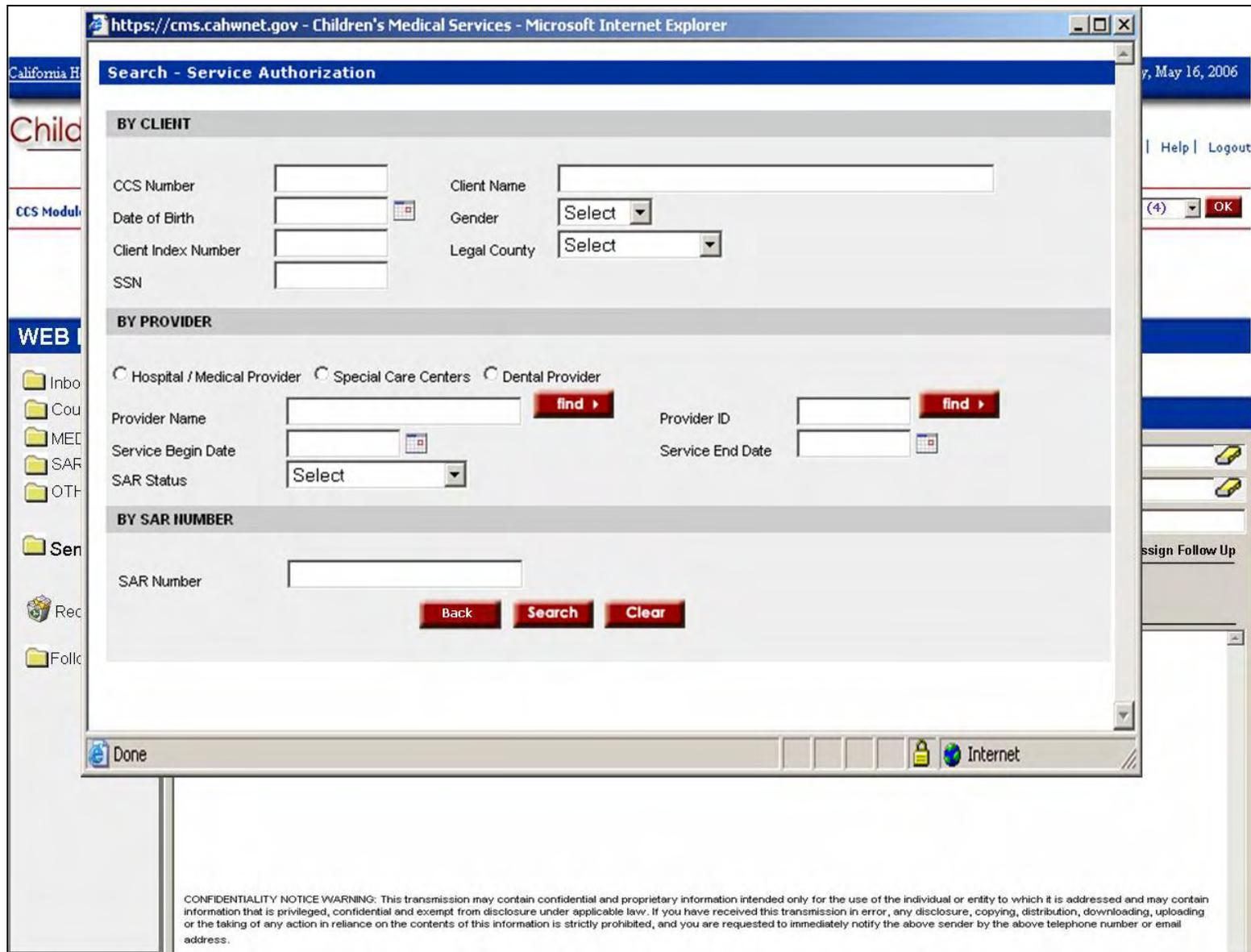


Figure 3-56, Search SAR to Add as Attachment

Web Follow-up

The search results of the SAR are shown in Figure 3-57. Click the SAR number hyperlink to view a print display of the SAR. Use the checkbox to select the SAR to attach, and then click the 'Select' button. Click the 'Back' button to return to the SAR search screen.

Search Results - List of SARs for NACHO LIBRE

SAR Number	Provider Name	Provider ID	SAR Status	Service Begin Dt	Service End Dt	Location Code
<input type="checkbox"/> 97002080100	COOK, AARON C MD	00A438170	Authorized	06/01/2007	06/01/2007	
<input type="checkbox"/> 97002077640	ORIENTE, STEVEN D MD	00A445492	Denied	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078540	ORIENTE, STEVEN D MD	00A445492	Denied	01/01/2007	02/01/2007	
<input type="checkbox"/> 97002078550	ORIENTE, STEVEN D MD	00A445492	Cancelled	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078560	ORIENTE, STEVEN D MD	00A445492	Cancelled	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078570	ORIENTE, STEVEN D MD	00A445492	Denied	01/01/2007	05/01/2007	
<input type="checkbox"/> 97002078580	ORIENTE, STEVEN D MD	00A445492	Cancelled	02/01/2007	02/01/2007	
<input type="checkbox"/> 97002078590	ORIENTE, STEVEN D MD	00A445492	Denied	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078610	ORIENTE, STEVEN D MD	00A445492	Cancelled	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078620	ORIENTE, STEVEN D MD	00A445492	Denied	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078630	ORIENTE, STEVEN D MD	00A445492	Denied	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078640	ORIENTE, STEVEN D MD	00A445492	Cancelled	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078650	ORIENTE, STEVEN D MD	00A445492	Cancelled	01/01/2007	01/01/2007	
<input type="checkbox"/> 97002078900	ORIENTE, STEVEN D MD	00A445492	Cancelled	02/02/2007	02/02/2007	
<input type="checkbox"/> 97002079800	ORIENTE, STEVEN D MD	00A445492	Authorized	03/01/2007	03/30/2007	
<input type="checkbox"/> 97002079810	ORIENTE, STEVEN D MD	00A445492	Authorized	04/01/2007	05/01/2007	
<input checked="" type="checkbox"/> 97002079840	ORIENTE, STEVEN D MD	00A445492	Authorized	03/01/2007	04/01/2007	
<input checked="" type="checkbox"/> 97002077630	WALL, DEREK B MD	00A643680	Cancelled	01/01/2007	01/01/2007	

1-18 out of 18 Matching Records

Back Select

Done Internet

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Figure 3-57, Select SAR

Figure 3-58 displays two SAR attachments on the attachment pop up screen.

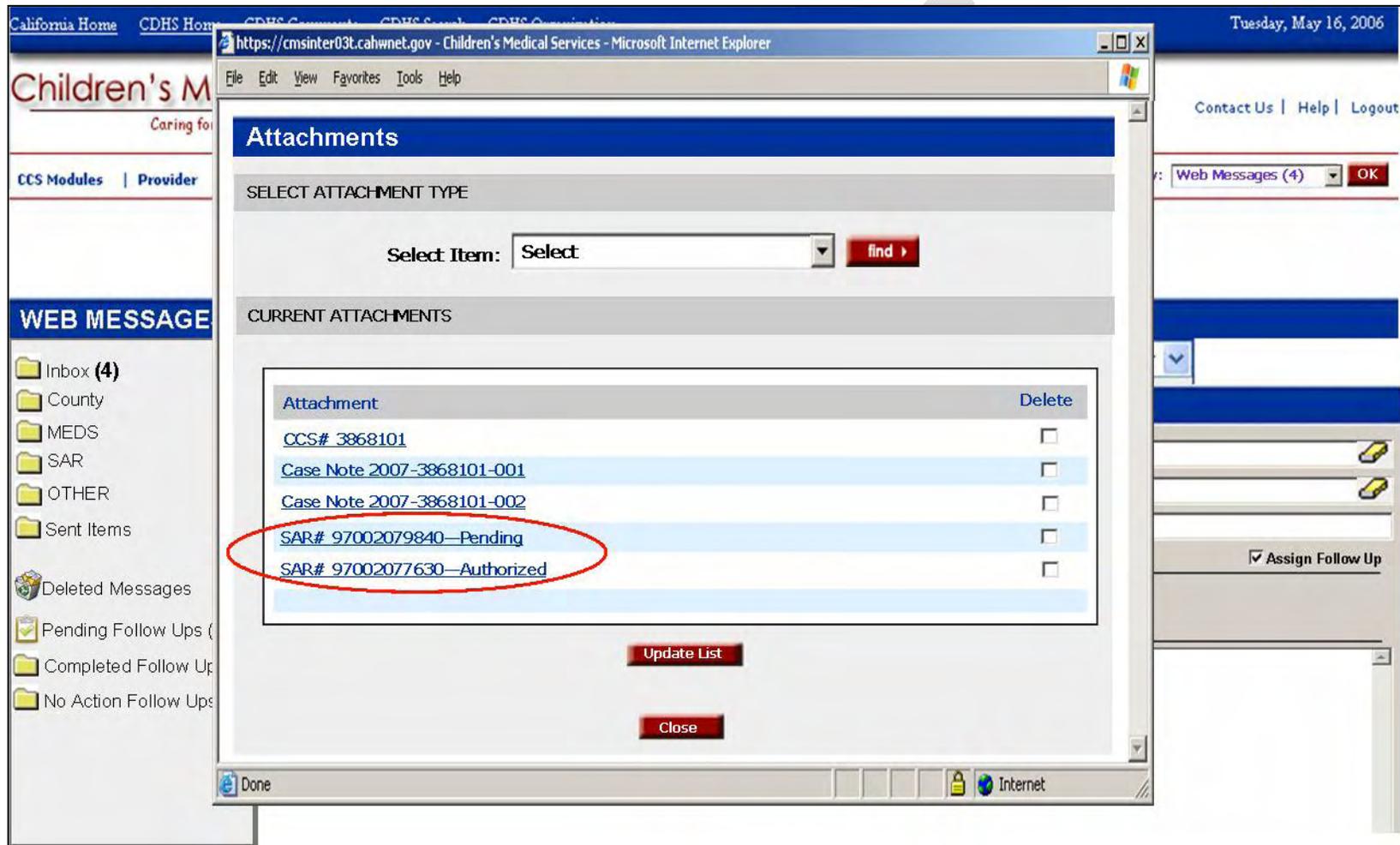


Figure 3-58, SAR Attachments Added

Web Follow-up

Figure 3-59 is a display of the SAR attachment when the attachment hyperlink is clicked.

The screenshot shows a web browser window displaying an email interface on the left and a PDF document on the right. The email interface is titled "New Message" and shows a subject line "New Referral received for: CCS# 3868101 Na". Below the subject line, there is an attachment list with one item: "1. CCS# 3868101 Case Note 2007-3868101-0001 Case Note 2007-3868101-0002 SAR# 97002079840- Pending SAR# 97002077630- Authorized". The attachment "SAR# 97002077630- Authorized" is circled in red. The PDF document is titled "CONFIDENTIAL CALIFORNIA CHILDREN'S SERVICES (CCS) SRO-SACRAMENTO REGIONAL OFFICE" and contains the following information:

Authorized Provider: ORIENTE, STEVEN D MD
17101 ARMSTRONG AVE
STE 201
IRVINE, CA 92614-5742

Provider Number: 00A445492
Telephone: (949) 476-2172

AUTHORIZATION FOR SERVICES
Authorization is for services and effective dates indicated below, in accordance with CCS program policies and fee schedule. Authorization for additional services not listed below must be requested in advance. By providing these authorized services, you agree to accept payment from the CCS program as payment in full. If you have a Service Code Grouping (SCG) authorization, please check your Medi-Cal manual for services included in the SCG.

CCS CLIENT INFORMATION

Client Name: NACHO LIBRE	Client Index Number: 31480641A5
Alias: APT #9999	County ID: 3868101
Address: 1111 K STREET ORANGE, CA 92862	CCS Case Number: 3868101
Parent/Guardian: MOM LIBRE	Date Of Birth: 01/01/2007
Address: 8888 FREEWAY BLVD APT #500 ORANGE, CA 92862	Gender: FEMALE
Medical Home: CENTRAL COAST ALLIANCE FOR HEALTH	Client Telephone: (916) 237-2378
Address: 1600 GREEN HILLS RD SCOTT'S VALLEY, CA 95066	Parent/Guardian Tel: (916) 237-2378
County: CONTRA COSTA	
Primary Diagnosis: 110.0 DERMATOPHYTOSIS OF SCALP AND BEARD	
Secondary Diagnosis:	

AUTHORIZATION INFORMATION

Effective Dates: 03/01/2007 through 04/01/2007

Service Code	Modifier	Service Description	Units	Amount
01		PHYSICIAN	1	

SPECIAL INSTRUCTIONS
THIS AUTHORIZATION VALID ONLY AS LONG AS CLIENT IS ENROLLED IN MEDI-CAL. FAMILY HAS NOT SIGNED CCS PROGRAM PAPERS; THEREFORE, CLIENT WILL NOT BE ENROLLED IN CCS WITH LOSS OF MEDI-CAL COVERAGE

Thank you for your continued participation in the California Children's Services Program

Issued By: PHAVISITH.SONE (SRO) **Date Authorized:** 08/07/2007

Printed On: Thu Oct 04 12:56:17 PDT 2007 **SAR #:** 97002079840

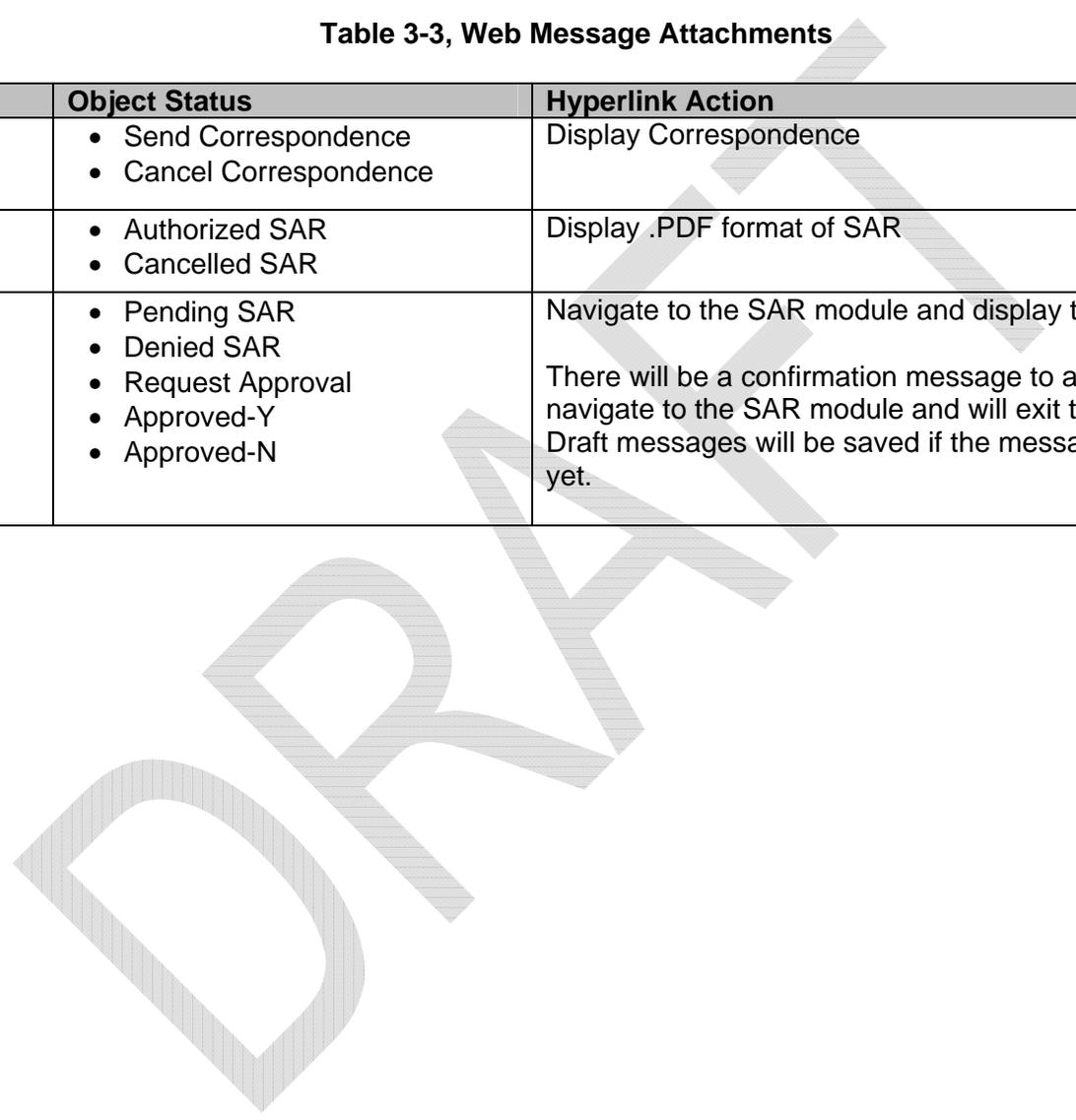
Page 1 of 1

Figure 3-59, View SAR Attachment

Table 3-4 displays the events and action of the attachments for correspondences and SARs.

Table 3-3, Web Message Attachments

Module	Object Status	Hyperlink Action
Web Correspondence	<ul style="list-style-type: none"> • Send Correspondence • Cancel Correspondence 	Display Correspondence
SAR	<ul style="list-style-type: none"> • Authorized SAR • Cancelled SAR 	Display .PDF format of SAR
SAR	<ul style="list-style-type: none"> • Pending SAR • Denied SAR • Request Approval • Approved-Y • Approved-N 	Navigate to the SAR module and display the SAR. There will be a confirmation message to ask if the user wants to navigate to the SAR module and will exit the Case Notes module. Draft messages will be saved if the message hasn't been sent yet.



3.17 PRINT FOLLOW-UPS

Follow-ups can be printed similarly to how Web messages are printed. The Follow-up must be opened by clicking the subject hyperlink. Click the printer icon to print the current Follow-up. Figure 3-60 displays the print format of the Follow-up with the list of tasks and grouping of attachments. Follow-up and task message threads are not displayed.

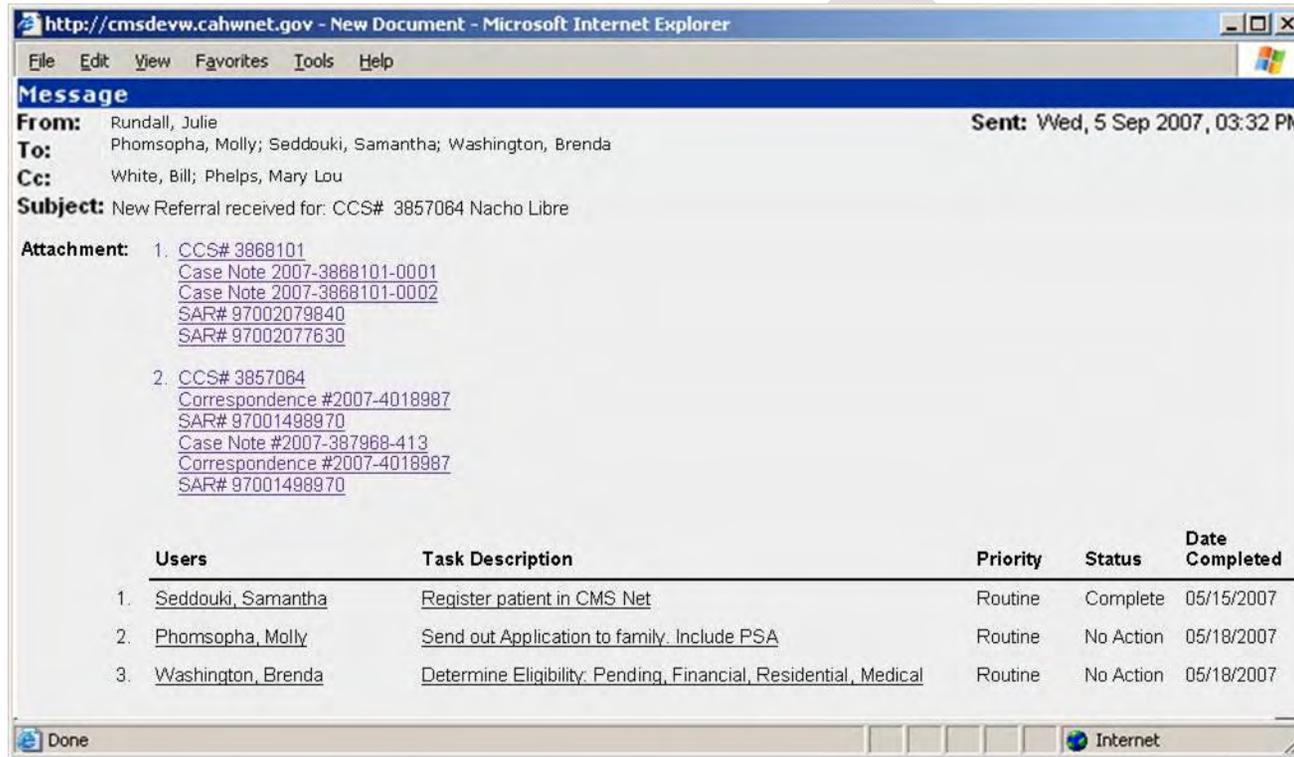


Figure 3-60, Print Follow-up

The printouts can include the list of involved users and their status, attachments, body of the message, and subject line. Figure 3-60 illustrates how the attachments are grouped by patient.

Table 3-4, Follow-up Fields in Web Messages Data Dictionary

Obj #	Field Name	Length Type Format	Req?	Description/Comments
1.	To	1 Control Object Button	Yes	Click the 'To' button to select Recipients. Recipients selected from the 'To' option are considered the Assigned users of the Follow-up.
2.	To (Recipient List)	List box	Yes	Displays the name of the Recipients. List Recipients in the 'To' list box are considered Assigned users of the Follow-up. 1. Users listed are the only ones that can be assigned to a task of the Follow-up. 2. A Follow-up item displays on the Follow-up list for all listed Recipients regardless if they are assigned to a task. 3. The Requestor can send the follow-up to him/herself
3.	Attachment	1 Control Object Button	No	System allows attachments of hyperlink to be added to the Web message to view the following: Patient, SAR, Correspondence, and Case Notes
4.	Hyperlinks	1 Control Object Hyperlink	No	Attached hyperlinks are used to view: Patient, SAR, Correspondence, and Case Notes. 1. Attachments are unlimited in number. 2. System automatically attaches the Patient when SAR, Correspondence, or Case Note is attached first. 3. System groups the attachments by Patient and displays them with hyperlinks.
5.	Assign Follow-up	1 Control Object Check box	Yes	Click check box to display the required Follow-up fields. 1. Check box can be unchecked prior to sending the Follow-up to Recipients 2. Check box is locked once Follow-up has been sent.
6.	Status (Follow-up)	8 Control Object Drop down list	Yes	Default value is Pending. Possible Values are: 1. Pending 2. Complete 3. No Action 4. Past Due
7.	Due Date (Follow-up)	10 Date	Yes	Enter the due date of the Follow-up. Cannot be a past date.

		99/99/9999		Default date is five days from today.
8.	Priority (Follow-up)	8 Control Object Drop down list	Yes	Default value is Routine Possible Values are: 1. Routine 2. Urgent
9.	Action Code (Abbreviation)	6 Alpha Numeric	Display only	Value is controlled by what action description was selected. This field is used to describe the action of the Follow-up using abbreviations. Points to the action code table. Default value is 'N/A'. Use abbreviation only. N/A - no further action AddlInfo - additional information required AER - Annual Eligibility Review Appt - appointment date Det - referral determination EIDet - eligibility determination MDDet - medical determination EPSDTPend - EPSDT pending Closure - Closure Over21Pend - Pending closure age over 21 FEIPend - Pending FEI Paperwork IDNPend - Pending Insurance Detail RptPend - Pending Reports ReqstPend - Pending Request TSAPend - Pending Treatment Services Agreement TAPPend - Pending Treatment Assessment Plan CTTPend - Pending Consent to Treat DMEPend - Pending DME RxBend - Pending prescription Xfer - Transfer of case Review - Review AppPend - Pending Application ContactFam - Contact Family CC - Courtesy / Carbon Copy
10.	Action Code (Description)	60 Alpha Numeric Drop Down list	Yes	This field is used to describe the action of the Follow-up using abbreviations. Points to the action code table. Default value is 'N/A'.
11.	Follow-up Completed Date	10 Date 99/99/9999	No	The Requestor enters the date of when the follow-up is complete.
Follow-up Message Objects				
12.	Follow-up Message control (expand/collapse)	1 Control Object Icon	No	Used to expand and collapse the follow-up message thread. Also displays a drop down list of any new or unread messages when the mouse pointer hovers over the control.

				Recipients can only see follow-up messages sent to them.
13.	Date (Follow-up message)	10 Date 99/99/9999	Display Only	Displays the date of when the follow-up message was sent.
14.	Subject (Follow-up message)	1 Control Object Hyperlink	No	Click the Subject hyperlink of the follow-up message to display a pop-up screen that contains the message sent. Subject descriptions will be indented to the right of the original message.
15.	Subject Message control (Follow-up message)	1 Control Object Icon	No	Used to expand and collapse the follow-up message thread. Also displays a drop down list of any new or unread messages when the mouse pointer hovers over the control.
16.	From (Follow-up message)	35 Alpha numeric Text	Display Only	Displays the name of the user that sent the follow-up message.
Task Objects				
17.	Select (check box)	1 Control Object Check box	No	Use check box to select tasks to delete, reassign, or use to send Web message.
18.	Task ID #	2 Numeric Auto number	Display Only	Each task gets assigned a Task ID. The ID numbers are auto numbers generated by the system. The highest number is 15; therefore, only 15 tasks can be created.
19.	Assigned Users	35 Alpha Numeric	Display Only	Displays the name of the Assigned user of the tasks. 1. Assigned users can only be the ones listed on 'To' list. 2. Assigned users can be assigned or reassigned to more than one tasks at a time 3. Users must be unassigned from all tasks prior to being removed from the Follow-up ('To' list) Assigning a user to a task is not required.
20.	Task Description	200 Alpha Numeric	Yes	Tasks descriptions are required prior to being sent to the Assigned and Notified Users. 1. Updated by the Requestor Only.
21.	Priority (Task)	7 Alpha Numeric Drop down list	Yes	Default value is Routine. This priority applies to the individual task. 1. Updated by the Requestor Only.
22.	Status (Task)	7 Alpha Numeric Drop down list	Yes	Display only. Default value is 'Pending'. Values can only be changed by the Requestor. Values are: 1. Pending – default value 2. No Action – displays when the Requestor completes the overall follow-up before the task

Web Follow-up

				<p>is complete.</p> <p>3. Complete – displays when the Assigned user enters a valid date of completion.</p> <p>4. Past Due – displays when the task is pending and the due date is in the past.</p>
23.	Date Completed (Task)	10 Date 99/99/9999	Display Only	Date entered in by the assigned user. Cannot be before the date when the overall follow-up was created / sent.
24.	Due Date	10 Date 99/99/9999	Yes	<p>Default value equals the current Follow-up's due date. Updated by the Requestor only.</p> <ol style="list-style-type: none"> 1. Cannot be greater than Follow-up's due date 2. Cannot be a past date
25.	Task Message control (expand/collapse)	1 Control Object Icon	No	<p>Used to expand and collapse the task message thread. Also displays a drop down list of any new or unread messages when the mouse pointer hovers over the control.</p> <p>Recipients can only see task messages sent to them.</p>
26.	Date (task message)	10 Date 99/99/9999	Display Only	Displays the date of when the task message was sent.
27.	Subject (task message)	1 Control Object Hyperlink	No	<p>Click the Subject hyperlink of the task message to display a pop-up screen that contains the message sent.</p> <p>Subject descriptions will be indented to the right of the original message.</p>
28.	Subject Message control (task message)	1 Control Object Icon	No	Used to expand and collapse the task message thread. Also displays a drop down list of any new or unread messages when the mouse pointer hovers over the control.
29.	From (task message)	35 Alpha numeric Text	Display Only	Displays the name of the user that sent the task message.
30.	Tasks Options	16 Alpha Numeric Drop down list	No	<p>Listed options:</p> <ol style="list-style-type: none"> 1. Send Message 2. Assign 3. Un-assign 3. Add Task 4. Delete Task <p>All options are available to the Requestor.</p> <p>All other users will only be able to use the 'Send Message' option.</p>
31.	Update	1 Control Object Button	No	<p>Click 'Update' to save changes to the following fields:</p> <ol style="list-style-type: none"> 1. Status (Follow-up)

Web Follow-up

				<ul style="list-style-type: none">2. Due Date (Follow-up)3. Subject (Follow-up)4. Action Code & Subject5. Follow-up Completed Date6. Task Description7. Priority (Task)8. Date Completed (Task)9. Due Date (Task)
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