

Quarter 1, 2004-2005 Programming Changes
Freeze Date: October 15, 2004
Implementation Date: December 1, 2004

1. **Issue:** Add option to review and print assessments with all data and fields visible.

Resolution: On the 'intermediate' screen a button (labeled INQ) will be placed at the beginning of each assessment record. When the INQ button is accessed a detailed data screen will display with all data fields that have been updated/completed for the particular assessment. The user will be able to print the data details.

2. **Issue:** Add "Case Number" sort to existing Incomplete reports to identify a single case with multiple incomplete records.

Resolution:

- **ADD:** sort criteria and "SORT BY" radio button for sorting the **246:R&DM Incompl/Provider Compl Assessments-Adult** report by "Case Number".
 - **ADD:** sort criteria and "SORT BY" radio button for sorting the **264: R&DM Incomplete Assessments - Child** report by "Case Number".
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3. **Issue:** Repeat Component Code and Case Number at the bottom of each detail assessment screen so that when the screen is printed, the Comp/Case is on both pages of the assessment.

Resolution:

ADD: to each detail assessment screen (below the Medical Necessity LPHA Signature, Credential and Date line)

- **COMP:** (component number)
 - **CASE NO:** (case number)
 - **LAST NAME:** (consumer last name)
 - **FIRST NAME:** (consumer first name).
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4. **Issue:** For adult assessments, prevent the addition of a new assessment when the Effective Date (Section 1 or Discharge Date) of the new assessment is earlier than the LOC-A (Section 2) Effective Date.

Resolution: Change adult programming to resolve issue.

5. **Issue:** Allow 17-18 year olds to have either children or adult assessments. Change Error Code 11266: Consumer is Under 18 Must Use Children's Assessment. Change Reason for Discharge "A=Age is 18 years or older". Add a warning if child is near 19 years of age, LOC-A Authorization End Date set to the day before child's 19th birthday, and the authorization period is less than 90 days.

WebCARE Functionality Changes for 18 Year-Olds

Currently, in WebCARE:

1. Consumers who are a 17 years of age or younger require a Child/Adolescent (CA) Assessment.
2. Consumers age 18 years or older require an Adult Assessment.
3. When a CA consumer turns 18 years of age, no further CA Assessments may be entered.
4. When the first Adult Assessment is entered for a consumer, no further CA Assessments may be entered or updated (consumer cannot return to CA services). The Adult Assessment will close any outstanding CA assessments.
5. If a CA Assessment is entered for a consumer, that consumer must meet the eligibility requirements for a CA consumer.
6. If an Adult Assessment is entered for a consumer, that consumer must meet the eligibility requirements for an adult consumer.

Resolution:

Proposed changes to WebCARE:

1. Consumers who are under 17 years of age require a CA Assessment.
2. **Consumers who are 17 or 18 years of age may be assessed as a CA or Adult.**
3. Consumers age 19 years or older require an Adult Assessment.
4. When a CA consumer turns **19** years of age, no further CA assessments may be entered. The CA LOC-A End Date (authorization period) must end on the day before the consumer's 19th birthday, even if the period is less than 90 days from the Section 1: TRAG Assessment Date. In this case, display a warning that the authorization period is less than 90 days.
5. When the first Adult Assessment is entered for a consumer, no further CA Assessments may be entered or updated (consumer cannot return to CA services). The Adult Assessment will close any outstanding CA assessments.
6. If a CA Assessment is entered for a consumer, that consumer must meet the eligibility requirements for a CA consumer.
7. If an Adult Assessment is entered for a consumer, that consumer must meet the eligibility requirements for an adult consumer.
8. The undischarged CA assessments for consumers age 19 or over will be auto-closed after their latest CA assessment expires.
9. Change CA 'Discharge Reason' to A=Consumer no longer meets child criteria for services. Change 'Error Code 11266' to 'CONSUMER IS UNDER 17 - MUST USE CHILDREN'S ASSESSMENT'. Change 'Error Code 11320' to 'DATE IS AFTER 19th BIRTHDAY. CANNOT ENTER DATES AFTER AGE 19.'

CHANGE: The definition for **Discharge Reason Code A: Consumer no longer meets child criteria for services.**

CHANGE: EDTS, BATCH and North Star files and file layout decode detail/descriptions for **Discharge Reason Code A.**

CHANGE: 'Error Code 11266' to 'CONSUMER IS UNDER 17 - MUST USE CHILDREN'S ASSESSMENT'.

CHANGE: 'Error Code 11320' to 'DATE IS AFTER 19th BIRTHDAY. CANNOT ENTER DATES AFTER AGE 19.'

6. **Issue:** Add a date and timestamp and UserID for Notes and Comments on both Adult and Children's assessments.

Resolution: When the component updates the Notes and Comment fields the program capture the date (MM/DD/YYYY format), timestamp and UserID of the person updating the information.

The note, date, timestamp, and UserID will be displayed at the beginning in the Notes and Comment fields. **ALL** notes and comments will be displayed. There will be no conversion of historical notes/comments to be displayed with associated date, timestamp or UserID.

Each individual note/comment will be limited to a 230-character data entry field. If more than 230-characters are needed for one note/comment entry, additional or multiple entries will be required.

7. **Issue:** Add 'Local Case Number', 'Last Update ID' and 'Unit'. Add sorts by 'Last Update ID' and 'Unit' to all reports.

Resolution:

ADD: Add sort criteria and "SORT BY" radio button for sorting the:

246:R&DM Incompl/Provider Compl Assessments-Adult

247:Assessments Expiring By Section - Adult

248: Assessments to Expire - Adult

251:Completed Assessments – Adult

264:Incomplete Assessments - Child

265:Assessments Expiring – Child

267:Completed Assessments – Child

reports by "Local Case", "Last Update ID" and "Unit".

8. **Issue:** Add 'Provider Complete' to the title of Report 264 (like Report 246).

Resolution: Change title of the 264 report from: **264: R&DM Incomplete Assessments - Child** to **264:R&DM Incompl/Provider Compl Assessments-Child**

9. **Issue:** Request received to report the number of consumers with visual and hearing impairment receiving services.
- Resolution:** Modify the Diagnostics online screen and batch processing to *require* Axis 3 diagnosis for community center mental health clients. If there is no physical diagnosis, then use code: **V65.5 = Person with feared complaint in whom no diagnosis was made.**
- ADD:** The diagnostics batch file process will be changed to require Axis 3 level 1 data.
- ADD:** Edit, error message and error code to the **diagnostic screen** in WebCARE to display when the field has been left blank.
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10. **Issue:** Add links to WebCARE Error Code Database on Intranet to WebCARE screens.
- Resolution:**
- CHANGE:** The adult and children's programming to allow the user to link to the WebCARE Error Database.
- ADD:** A button to *all* the WebCARE screens (located above the 'Client ID' number field) so that when the user clicks on the link a new browser window will open. The user will be able to:
- Enter the specific screen number and error code (number), and
 - Receive the resolution (how to resolve the error) and associated business rule(s).
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11. **Issue:** For Adult assessments, allow Crisis authorizations for up to 14 days when an open assignment H0-36 (Crisis Stabilization Unit) code has been entered in CARE on the 321 screen.
- Resolution:**
- CHANGE:** Change edits to the Adult RDM assessment program and screens and allow CRISIS authorization for up to 14 days, if there is a **open** H0-36 assignment.
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12. **Issue:** Header label changes for reports need to be consistent. Header column label change.
- Resolution:** The **246:R&DM Incompl/Provider Compl Assessments-Adult Resolution** needs to have the header labels consistent with other report screens.
- CHANGE:** Label of column header from **PURPOSE** to **TYPE**.
- CHANGE:** Column label for *all* reports from **LAST UPDATER** to **LAST UPDATED BY**.
- 246:R&DM Incompl/Provider Compl Assessments-Adult**
247:Assessments Expiring By Section - Adult
248: Assessments to Expire - Adult
251:Completed Assessments – Adult
264:Incomplete Assessments - Child
265:Assessments Expiring – Child
267:Completed Assessments – Child
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13. **Issue:** Extended Review for Adult assessments maybe in conflict with authorization 90-day timeframe.
- Resolution:**
- CHANGE:** Place edits in the Adult RDM assessment programming that will NOT allow an Extended Review, if the 90-day timeframe expires before the 180 day extended review period.
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14. **Issue:** Operationalize the 'Percentage, CONSUMERS WITH ASSIGNMENTS BUT NO ASSESSMENTS, and CONSUMERS WITH ASSIGNMENTS AND EXPIRED ASSESSMENTS reports that are currently being distributed by Field Support.
- Resolution:** **ADD** reports to X/PTR report file.
- NOTIFY** users that X/PTR Instructions and User Guide are available on the Intranet at:
<http://www2.mhmr.state.tx.us/655/CIS/Training/jhsxptr.html>. Users will have to have mainframe CARE access to access X/PTR reports.