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## Automated Case Review System for transitional assistance

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AUTOMATED CASE REVIEW SYSTEM  
FOR TRANSITIONAL ASSISTANCE

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A Project  
Presented to the  
Faculty of  
California State University,  
San Bernardino

---

In Partial Fulfillment  
of the Requirements for the Degree  
Master of Science  
in  
Computer Science

---

by  
Don Minh Le  
March 2011

AUTOMATED CASE REVIEW SYSTEM  
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by  
Don Minh Le  
March 2011  
Approved by:

  
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Dr. Tong Yu, Advisor, Computer Science and Engineering

3/17/2011  
Date

  
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Dr. Josephine Mendoza

## ABSTRACT

The County of San Bernardino Transitional Assistance Department is held to strict standards by the State of California. Case Review System checks work to see if it matches these standards. The current Case Review System is a manual process that is being performed by Eligibility Lead Workers and Eligibility Worker Supervisors.

This proposed automated system, Case Review System is designed to track, catch mistakes in determining eligibility of the welfare applicants. Case Review System also provides the Transitional Assistance Department (TAD) the ability to report error trends as a training tool to reduce future case errors. This system will enhance the productivity, integrity, and accuracy of TAD's business, which is responsible for administering the financial support programs to persons in need of financial, and/or nutritional and/or medical assistance.

The users of this system are the District Managers (DM), Resource Supervisors (RS), Corrective Action Supervisors (CAS), Eligibility Worker Supervisors I (EWS I) and Eligibility Workers III (EW III). Also, Case Review System will help Eligibility Workers (EW) submitting the rebuttal requests and fixing their errors according to the state's requirements.



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I would like to express my gratitude to my employer, The County of San Bernardino, for making it possible for me to pursue a graduate degree at a full-time pace, and still make a living.

Finally, I would also like to acknowledge my parents for their support and sacrifice in many ways so that I could focus on my studies. Thank you to my pregnant wife, Donna — who is due to have our first baby in the peak time of submitting my project report and presentation. She has given me love, support, and motivation to finish my project on schedule. Most importantly, I am indebted to all powerful almighty God for all the blessings he showered on my life.

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# CHAPTER ONE

## INTRODUCTION AND BACKGROUND

### Background of the Problem

The Transitional Assistance Department (TAD) is a department of County of San Bernardino that is responsible for administering the Department's financial support programs to persons in need of financial, and/or nutritional and/or medical assistance. The list below is a detailed list of services provided by TAD.

- CalWORKs Program
- Food Stamp Program
- Medi-Cal Program
- Health Care Options
- Refugee Resettlement Program
- General Relief Program
- Cash Aid Program for Immigrants
- Child Care Programs
- Foster Care Program

Eligibility Workers (TAD's employees) screen potential applicants to determine if the applicant meets certain guidelines in order to be eligible for the program. In addition, applicants must be re-evaluated every six months to ensure that they are still eligible for the program. In order to ensure that applicants are being properly screened and to catch mistakes early for



determining eligibility, all TAD offices are required by the State of California to conduct case reviews on these cases.

The current Case Review System is a manual process that is being performed by Eligibility Workers Supervisors I's and Eligibility Workers III's.

### Definitions of Terms

The following table contains terms used in this document, the term's definition, and, if relevant, how the term corresponds to functionality in the Case Review Process.

Table 1. Definitions of Terms

<b>Term</b>	<b>Definition</b>
Annual	Once in 12 consecutive months.
Annual Re-Evaluation (RE) Date	Intake - The first annual RE will be due in the 12th month. Example: Application month 1/05, first RE date is 1/06.  Continuing - Scheduled the same calendar month of the following year.
API	An Application Program Interface is the specific method prescribed by a computer operating system or by an application program by which a programmer writing an

	application can make requests of the operating system or another application.
Application	Case Review System
Architecture	Application structure and database design.
Batch Process	Refers to execution of a series of programs ("jobs") on a computer without human interaction.
Beginning Date of Aid (BDA)	<p>The BDA is the first of the month when an application is received by TAD, or the first of the month all eligibility requirements have been met.</p> <p>The BDA for special Medi-Cal programs may have other benefit effective date rules. If BDA rules are not given in the specific instructions for special programs, follow the above.</p>
Case	Paper and electronic records of Eligibility stored in case folders and in the C-IV Web Application.
C-IV	<p>The Statewide Automated Welfare System (SAWS) Consortium-IV, a user-friendly, customer-based, on-line and fully integrated information system designed to</p>

	manage the data for social service programs.
C-IV Data Pull	A manual transfer of data from C-IV Oracle database to the case review system.
Continuing Worker	An Eligibility Worker who determines on-going eligibility for a case, completes the yearly re-evaluation, and discontinues cases when eligibility no longer exists. Also referred to as a Continuing Worker.
Continuing Case	Case that has been approved and transferred to a continuing worker.
Corrective Action Coordinator (CAC)	A district manager who coordinate the corrective actions for all regions.
Corrective Action Supervisor (CAS)	An EWS I who oversees corrective actions for their region.
Corrective Action Group (CAG)	The TAD unit which includes one Corrective Action Coordinator and many corrective Action Supervisors.
County Use Sections	Sections reserved for the use of County of San Bernardino personnel.
EW I, II	Eligibility Worker. Also called Case Worker.

EW III	Eligibility Lead Worker
EWS I	Eligibility Worker Supervisor
Full Case Review	<p>List of questions that are applicable to Medi-Cal cases that are open.</p> <ul style="list-style-type: none"> <li>• The available answers in a case review are “Hard” or “Procedural” and “N/A” (Not Applicable) for each question.</li> </ul> <p>When the review is complete a review sheet is printed showing the questions with “Hard” or “Procedural” selected.</p> <p>A hard error occurs if the:</p> <ul style="list-style-type: none"> <li>• Problem affects eligibility and/or benefits in the audit month.</li> <li>• Hard errors must be accompanied by the description and reason in the comments section</li> </ul> <p>A procedural error occurs if the:</p> <ol style="list-style-type: none"> <li>1. Problem cited affected eligibility and/or benefits in</li> </ol>

	<p>prior and/or future month's benefits.</p> <p>2. Problem cited does not affect eligibility and/or benefits in the audit, prior and/or future months, i.e. incorrect income used in the budget but family and/or person is still eligible to zero SOC Medi-Cal.</p> <p>Procedural errors must be accompanied by the description and reason in the comments section.</p>
ICT	Inter County Transfer. Process of transferring a case to a different county.
IDT	Inter District Transfer. Process of transferring a case to a different district office.
IEVS	<p>Income and Eligibility Verification System (IEVS). IEVS matches the applicant/recipient's name, SSN and DOB with:</p> <ol style="list-style-type: none"> <li>1. Employment Development Department (EDD)</li> <li>2. Unemployment/Disability benefits from EDD</li> <li>3. Interest and Dividend information from Franchise</li> </ol>

	<p>Tax Board (FTB)</p> <p>4. Social Security information from Social Security Administration (SSA)</p>
Intake Worker	An Eligibility Worker who conducts the initial interview, determines eligibility, and approves, or denies the case.
Intake Case	Case in the initial application and eligibility determination stage. Intake workers work on Intake cases.
Interoperability	It is the ability of a system or a product to work with other systems or products without special effort on the part of the customer.
MCRS	Medi-Cal Case Review System. Since the scope of the first phase of the Case Review System is only limited to the Medi-Cal program, the system is sometimes called the MCRS.
Pertinent Information	<ul style="list-style-type: none"> <li>• Any item that needs to be addressed and not meeting the definition of hard error or procedural error as defined.</li> <li>• Pertinent information must be accompanied by the</li> </ul>

	description and reason in the comments section.
Programming Interface	A programming interface, consisting of the set of statements, functions, options, and other ways of expressing program instructions and data provided by a program or language for a programmer to use.
Random Sample	The total number of randomly selected cases pulled per worker dependent on the worker's status.
Rebuttal	Process in which an EW disagrees with a review of a case that indicated an error occurred.
Resource Supervisor	An EWS I who is a resource for EWs in their office; also oversees corrective actions.
Review Sample	15 cases are required to be reviewed per worker with "Regular" status per month.  20 cases are required to be reviewed per worker with "Performance Issues" status per month.  15 cases are required to be reviewed per worker with "Probationary" status per month.
SAWS I	The current application form used in TAD offices, which is

	required when application is made in the district office or by phone application to preserve application date.
Statement of Fact	Statement of Citizenship, Alien, and Immigration Status (State Form)
Tier I Review	Full Reviews
User Interface	<p>A user interface, consisting of the set of dials, knobs, operating system commands, graphical display formats, and other devices provided by a computer or a program to allow the user to communicate and use the computer or program.</p> <p>A graphical user interface (GUI) provides its user a more or less "picture oriented" way to interact with technology. A GUI is usually a user-friendly interface to a computer system.</p>
Worker Number	C-IV Case Worker ID: 10 digit number ( {2 digits } - county,{2 digits } - Staff type, {2digits }- District, {4digits }- Worker ID)
Worker's status	Position or rank of a social worker in relation to his or her work performance. There are three types of status:



	Regular, Performance Issues, and Probationary.
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### Purpose of the Project

I am an employee of the Information Technology & Support Division (ITSD) of the County of San Bernardino, and have been assigned to be the Project Leader on this Case Review System project. With the ITSD director's permission, I am authorized to use this project in partial fulfillment of the requirements of the degree Master of Science.

The current Case Review System is a manual process that is being performed by EWS Is and EW IIIs. The reviewers utilize an Excel sheet to record every individual review's results and print out many copies for the appropriate parties. Since this paper-based process is very time-consuming, a reviewer is only able to review a very limited number (three) of cases per day. Also, the rebuttal and error corrective processes are not done in a timely manner because of the slow paper communication among the large number of TAD offices. Moreover, the overhead of administering the questionnaire and answer spreadsheet in Excel format is very high, especially when the State of California applies the new eligibility guidelines and regulations. Lastly, the biggest drawback of the manual process is the lack of ability to generate accurate and meaningful reports for the management decisions and training purposes.

This automated system, Case Review System is designed to track, catch mistakes in determining eligibility of the welfare applicants. Moreover, Case Review System provides the Transitional Assistance Department (TAD) the ability to report error trends as a training tool to reduce future case errors. This system shall enhance the productivity, integrity, and accuracy of the case review business.

Due to time constraint, the scope of this Master Project is limited to the Medi-Cal case reviews of the welfare programs provided by TAD. This automated system will provide the functionality to connect to the California State system to pull down the case for review purposes. The Medi-Cal case review business is very similar to the other welfare programs case review business. Therefore, this automated system can serve both as a framework of other case review programs as well as a pilot application that ultimately will completely replace the current manual business process.

## Current Business Process

### Introduction

The current business process focuses on how a Medi-Cal case review is conducted. The following is a very high level overview of how the process starts and completes.

- 1) The C-IV Cases are selected randomly then pulled and given to the reviewer.
- 2) The reviewer utilizes a Case Review Count Sheet (Excel spreadsheet) to determine if the number of cases to be reviewed for a particular worker has been met.
- 3) The reviewer uses a "Case Audit Sheet" in Excel to conduct the review. This excel sheet has the questions and the score card for the review.
- 4) The reviewer prints three copies of the Case Audit Score Card.
- 5) The reviewer then updates the Case Review Count Sheet to ensure the number of cases reviewed is accurate for the EW.

The above high level process flow shows the complete life cycle of a Medi-Cal case review from inception to conclusion or decision. The Excel spreadsheets are kept by the individual district offices and are not combined after the end of a review session.

### Context Diagram

The current business process is illustrated in the following context diagram. This high level overview shows that the case begins with the Eligibility

Worker and ends with the Eligibility Worker. The Eligibility Worker assigned to the case is a key factor in this process. This also shows that currently there is no automated system utilized when conducting a Medi-Cal Case Review

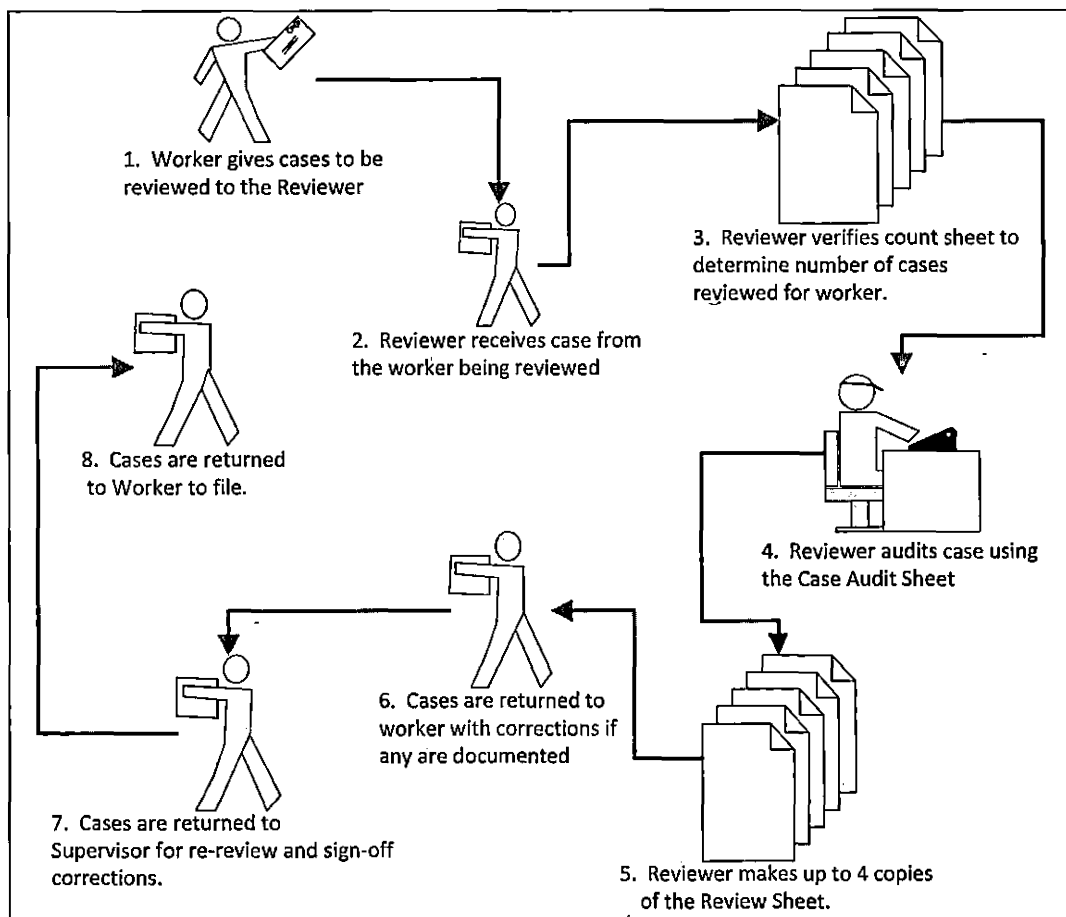


Figure 1. Current Business Context Diagram

### Case Review Business Process Decomposition

The following diagram identifies the tasks that are involved when completing a Medi-Cal Case Review.

# Medi-Cal Case Review Current Process

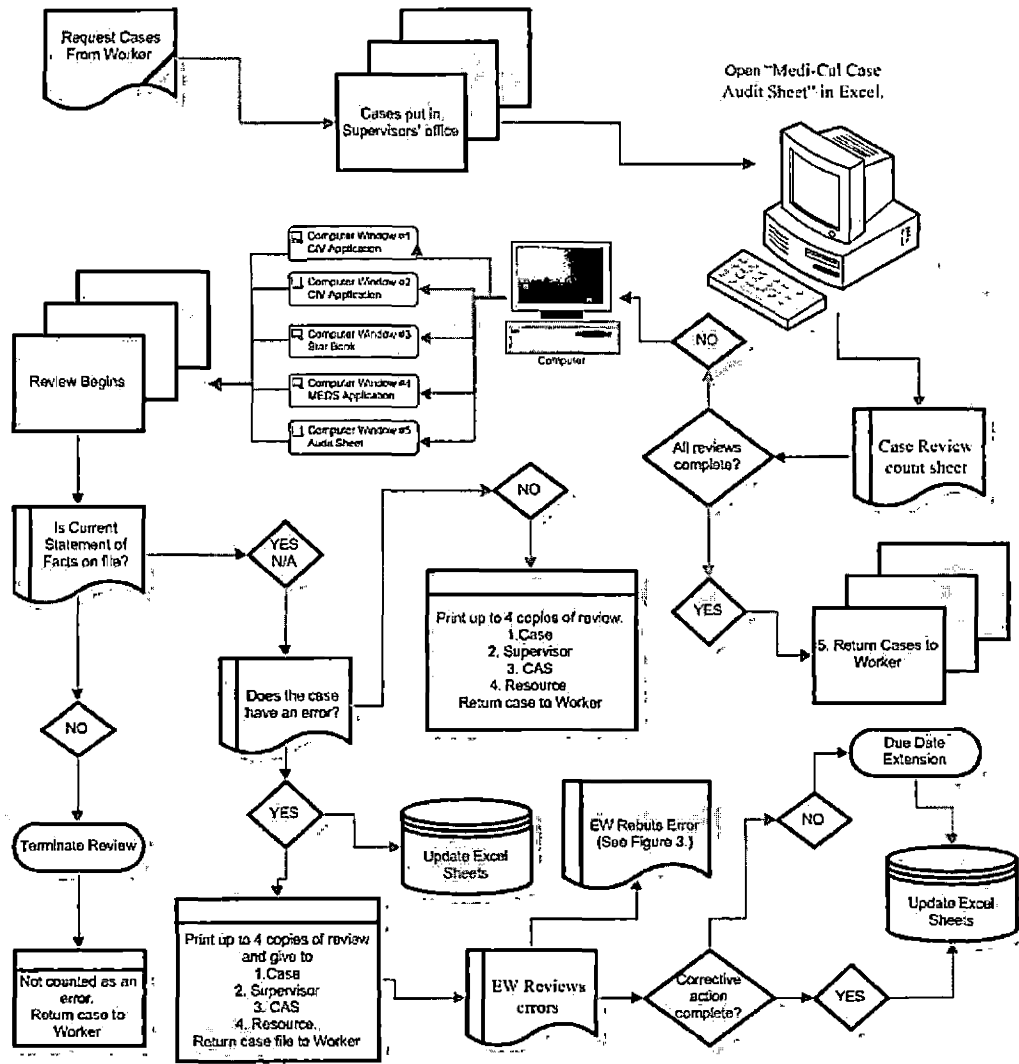


Figure 2. Case Review Process Decomposition Diagram

## Case Review Rebuttal Process Decomposition

The following diagram identifies the tasks that are involved when completing a Medi-Cal case review rebuttal.

### Medi-Cal Rebuttal Process

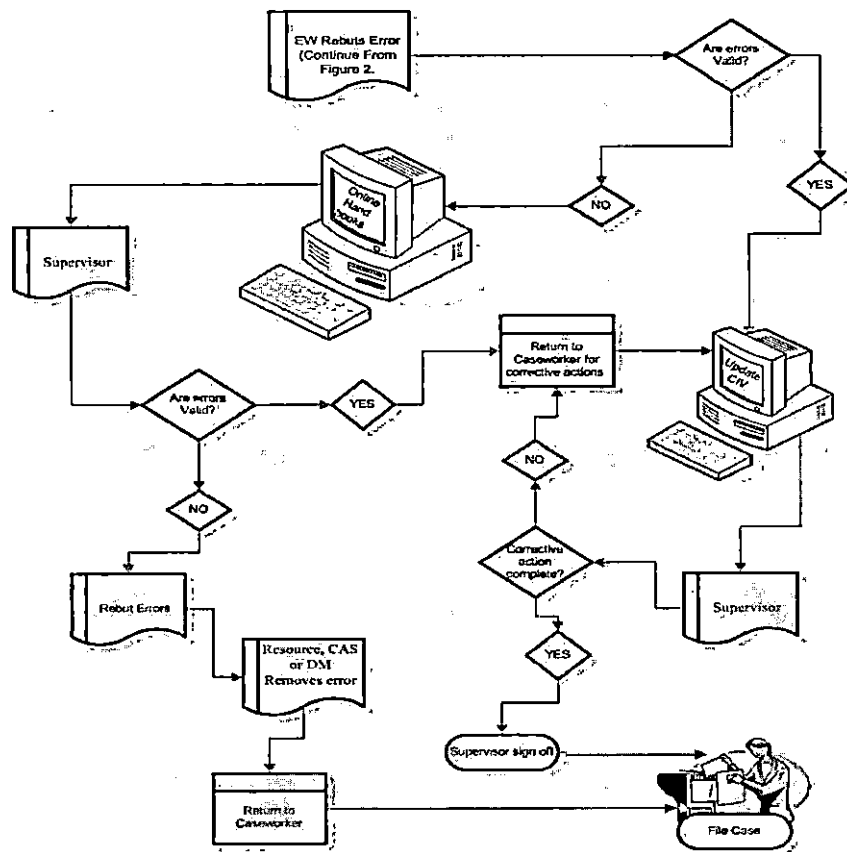


Figure 3. Rebuttal Process Decomposition Diagram

## Business Rules

### Overview

TAD Medi-Cal Case Review business rules further define the business process that applies to the case review process, and identify data relationships and/or a data hierarchy.

Case reviews are performed monthly for each Eligibility Worker. Five cases are reviewed for each worker who is on regular status. Ten cases are reviewed for each worker, who is on probationary or performance-issue status. A sample of at least fifteen cases will be pulled for each case review.

### Medi-Cal Cases

Medi-Cal cases will be pulled by identifying Medi-Cal Eligibility Workers in the C-IV system. In addition, continuing cases will be identified using the re-evaluation date. Reviews will be conducted two months after the re-evaluation date. For instance, if the review month is 10/2006, cases would be pulled based on a re-evaluation date of 08/2006. Intake case reviews will use the current benefit month to identify the case as an Intake case.

### Medi-Cal Case Reviews

There are four types of Medi-Cal case reviews. The Full Review Intake and Full Review Continuing will include the full set of questionnaire. The Focus Review Intake and Focus Review Continuing are partial reviews which contain a subset of questions from the Full Review.

## Case Review Rules

Following are the rules that govern the process for reviewing cases:

- A Medi-Cal case review may be completed in the same month that a CalWORKs or Food Stamp case review is completed on a case.
- Case reviews are conducted on the worker who has approved benefits for the review or benefit month.
- The same type of review cannot be conducted more than once in the same month.
- A Full Medi-Cal case review can only be completed once a year for a continuing review.

## Limitations of the Solution

Due to time constraint, the scope of this Master Project is limited to the Medi-Cal case reviews and does not include all of the welfare programs provided by TAD. However, the Medi-Cal Case Review business is very similar to the other welfare programs case review business.

Due to ITSD application development standard and policy, the system will need to be designed and developed as a web solution using ASP.net and C#. The web scripting language will be VB.net to be compliant with ITSD application development standard and policy.

Due to the size constraint of TAD as well as the limitation of budget and timeline constraints, this Medi-Cal Case Review is designed for less than 10,000



users; 50,000 reviews per month; and 100 review questionnaires per system.

The system will only hold five years of data. The data that are more than six years old will be archived and can be restored for auditing purposes.

## CHAPTER TWO

### SOLUTION OVERVIEW

#### Product Perspective

This automated system, Medi-Cal Case Review System is designed to track and catch mistakes in determining eligibility of the Medi-Cal applicants. Moreover, MCRS provides the Transitional Assistance Department (TAD) the ability to report error trends as a training tool to reduce future case errors.

The users of MCRS are the District Managers, Resource Supervisor (RS), Corrective Action Supervisor (CAS), Eligibility Worker Supervisors I (EWS I) and Eligibility Workers III (EW III). MCRS will help Eligibility Workers (EW) to submit the rebuttal requests and to fix according to the state's requirements their errors in a timely manner

#### System Components and Dependencies

- Web Server (Windows 2003-2008, IIS 7.5, Framework 3.5)
- Internet Explorer 7.0, or greater.
- SQL Server 2008 Database
- VS 2010 ASP.Net/VB Application
- ITSD Framework Library
- Microsoft Ajax framework
- About controls
- Infragistics ASP.net controls

- Team Foundation Server for code repository
- County WAN
- C-IV System data transfer through oracle connection.
- Data warehouse automated transfer.

### Subsystem Interconnections and Deployment Diagram

The following UML 2 diagram illustrates the subsystem interconnections and deployment infrastructure.

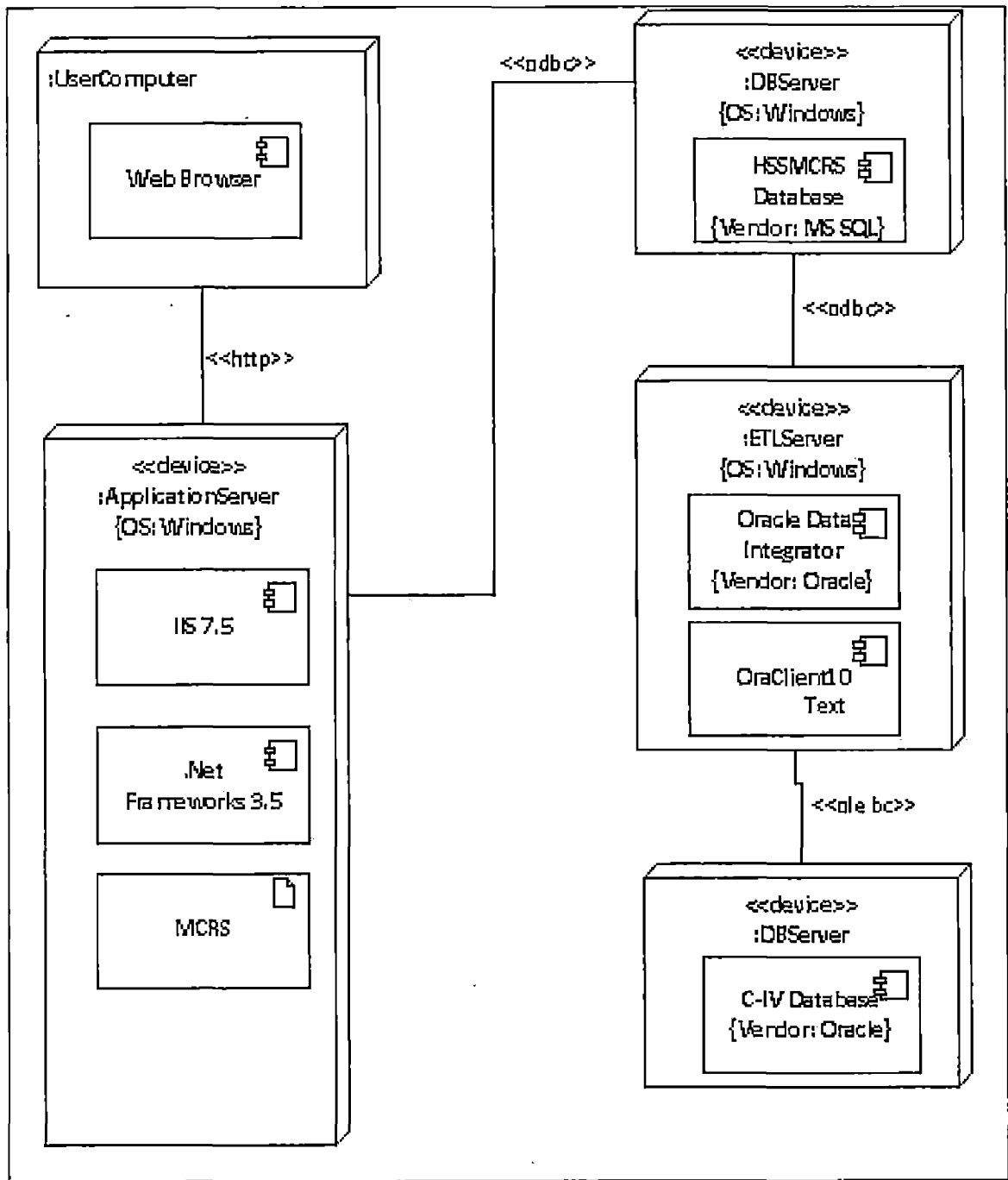


Figure 4. Deployment Diagram

## Product Functions

### System Administration

The ITSD support staff and TAD Administrator have the ability to adjust the application settings and business rule settings. They can also maintain the lookup tables and manage the application security settings. Moreover, the system includes the Questionnaire Builder Module that allows the administrator to build or modify the questionnaire reviews

### Cases Pulling

EWS I and EWIII will use the Case Selector Module to pull a list of cases from C-IV database to perform the case review process. Depending on the status of the case workers, the reviewers should get a pre-defined number of cases in their review lists. However, the users in certain profile levels can adjust this list of cases. For some review types, reviewer can manually add a case that does not exist in the C-IV database.

### Case Review

After pulling the Case-Review lists, reviewers will answer the questions based on the review questionnaires. Reviewers have the choice to finish a whole review, save their work or continue the review at a later time. Reviewers are not allowed to go back and modify the submitted (completed) reviews.

### Rebuttal of Cases in Error

Once a reviewer finished reviewing and cited error(s) to a case, the system notifies the case worker via email. The case worker has the ability to

review the error and rebut one or many errors. The case worker is required to submit a short declaration to justify his/her rebuttal request.

#### Rebuttal Requests Processing

The case worker's rebuttal requests are processed and evaluated by his/her supervisor and the reviewer (who had cited the errors.) The supervisor or the reviewer decides to approve or disapprove the rebuttal requests and provide the reason for approval or disapproval. The errors will be automatically removed once the rebuttal requests get approved. The Resource Supervisor (RS) or Corrective Action Supervisor (CAS) or District Manager (DM) can overwrite the EWS and EW III decisions. All of the changes will be tracked and recorded.

#### Error Correction

It is the case worker's responsibility to correct the errors (unless his or her error rebuttal requests are approved). The case worker will have 10 days from the error's cited date to correct his or her error. The DM has the authority to extend the correction due date. All of the error corrections have to be reviewed and checked off by the RS or CAS or DM.

#### User Characteristics

The following user roles will be defined in the MCRS:

- Case worker
- Case review Staff
- Corrective Action Group

- Manager
- System Administrator

### Case Worker

The Case workers have the authority to review their reviewed cases and rebut any cited errors. The following screens that they can access are:

- My Cases screen
- Rebuttal Request screen

### Case Review Staff

The Case Review Staff can do the following tasks after they log into the application system:

- Pull cases from C-IV data and enter Case information into the MCRS.
- Recall the existing Case-pull.
- Review a Tier Review or re-review for continuing case.
- Check a Rebuttal status and respond to Rebuttal Cases.
- Disapprove or approve the error rebuttal requests.
- View certain reports that are listed on the User Profile and report table at the end of a report session.

### Corrective Action Group

In addition to the task done by the Case Review Staff, CAG Staff can also perform the following:

- Overwrite the rebuttal conclusion made by the case worker.
- Remove error(s) in the rebuttal case(s).

- Verify and sign off the correction dues.
- Perform re-review.
- View all reports.

### Manager

The managers can perform the tasks done by the Case Review Staff as well as the following:

- Possess all the rights that the CAG has.
- Extend the correction due date, check and manage the rebuttal process.
- Overwrite the rebuttal conclusion made by the CAG.
- View all reports.
- Administer the MCRS such as change maintenance look up tables, manage the security settings, and manage the review questionnaire.

### System Administrators

- Administer the MCRS such as change maintenance look up tables, manage the security settings, and manage the review questionnaire.
- Configure system setting like connect the application to the correct database.



## CHAPTER THREE

### SYSTEM DESIGN OVERVIEW

#### Solution and Project Structure

The components, libraries, projects will be organized in a manner consistent with Microsoft Best Practice recommendations [5]. The below figure below describes the main structural organization.

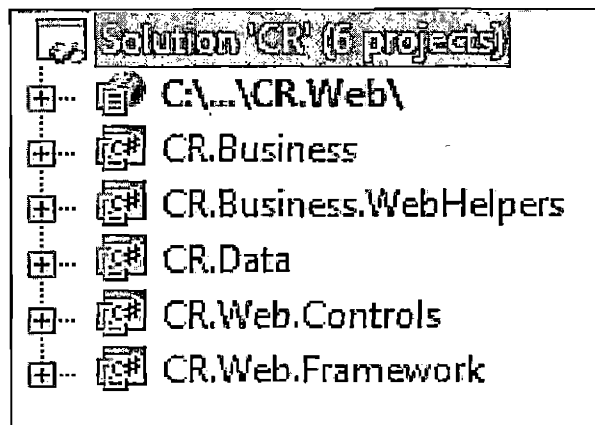


Figure 5. Solution and Projects Structure

The following table illustrates the directory structure of each project in the solution.

Table 2. Solution Directory Structure

Name (Tree structure)	Type	Comments/ Descriptions
MCR\	Folder	Solution Folder
CR.sln	File	Solution File
CR.Business\	Folder	Business Class Library Folder
CR.Business.vbproj	File	Business Class Library Project File
CR.Business.WebHelpers\	Folder	Utilities / Helper Function Class Library Folder
CR.BusinessWebHelpers.vbproj	File	Utilities / Helper Function Class Library Project File
CR.Data\	Folder	Data Class Library Folder
CR. Data.vbproj	File	Data Class Library Project File
CR.Web\	Folder	Web Application Folder
CR.Web.vbproj	File	Web Application Project File
Admin \	Folder	Administration Web Module Folder
App_GlobalResources\	Folder	Application resources folder
Resource.resx	File	This resource file stores the text of the following static web controls

RSMessages.resx	VS File	This resource file stores the text of the run-time messages.
App_Themes\	Folder	Application Theme and skin Folder (also including CSS file)
App_MasterPages\	Folder	Application Master page folder
App_Themes\	Folder	Application Theme and skin Folder (also including CSS file)
ClientScript\	Folder	This folder stores the JavaScript and Xml file
Images\	Folder	This folder stores the images used in the web application
Modules\	Folder	This folder stores the Web User Controls
CR.Web.Controls\	Folder	Custom Controls (Class Library) Folder
CR. Web.Controls.vbproj	File	Custom Controls (Class Library) Project File
CR.Web.Framework\	Folder	Web Framework (Class Library) Folder
CR. Web.Framework.vbproj	File	Web Framework (Class Library) Project File

## System Architecture

This MCRS system is designed using N Tier architecture, which allows the system to be divided into separate logical layers. Each layer interacts only with the adjacent layer for a specific function. The diagram below presents the architecture of the system.

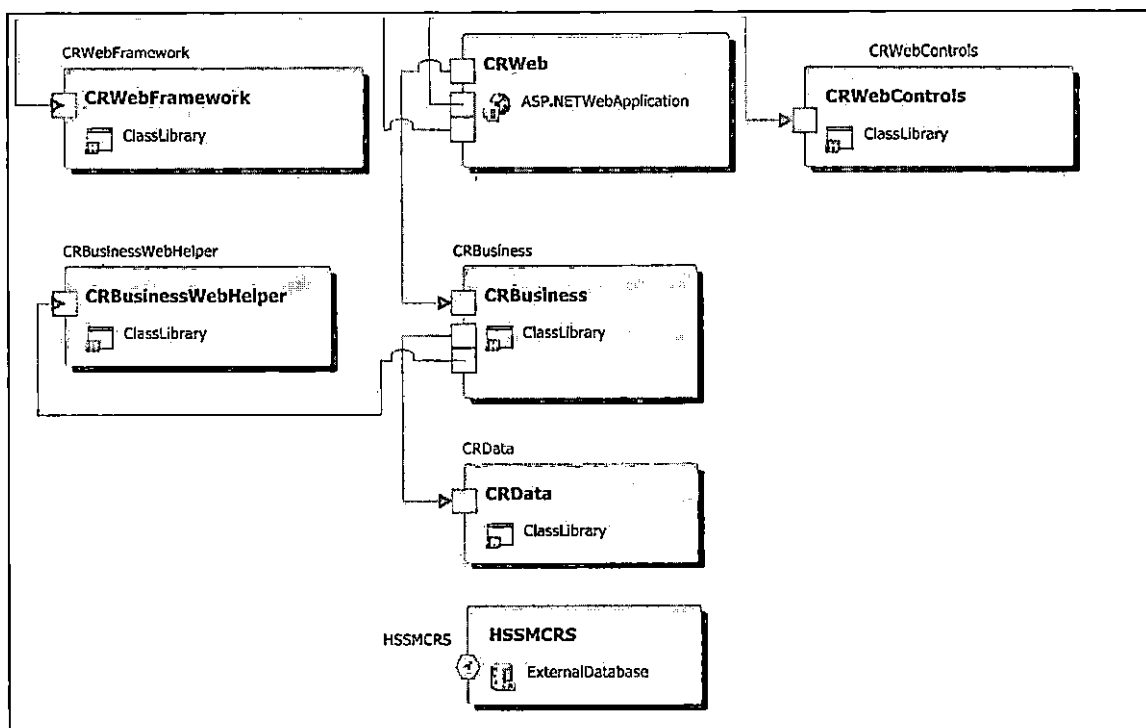


Figure 6. System Diagram

### CR.Web

This Tier is responsible for communication with the users and web service consumers. It uses Business Layer objects to respond to the GUI raised events.

### CR.Web.Controls

This is a namespace that is under the presentation tier. This namespace contains the custom control classes that help support the GUI.

### CR.Web.Framework

This is a namespace under the presentation tier. This namespace contains the web helper classes which provides support for the presentation layer.

### CR.Business

This is a logical tier that contains the logical business classes. This tier does not know about any GUI controls and how to access databases; the Data Access Tier classes supplies the required information from the databases to this sub tier.

### CR.Business.Webhelpers

This is a namespace under the business logical tier that contains the helper classes. The helper classes support the special requirements that relate to the web objects such as Web.Caching, Webparts, httpcontext, etc.

### CR.Data

This tier acts as an interface to the Data Tier. This tier knows how to retrieve and/or store information from the database.

## Object Oriented Architecture

### Major Objects in CR.Business

CR.Business is a logical tier which contains more than seventy logical business classes. The most important class in this project is the Questionnaire class. Because the reviews are in the format of a questionnaire, the Review class is derived from the Questionnaire Class. Review class inherits all attributes of the Questionnaire class. Since the MCRS system also supports the re-review, rebuttal, and error review processes, the ReReview, Rebuttal, and ErrorReview classes are introduced in CR.Business library. These classes represent the specific kinds of the Review. Therefore, the ReReview, Rebuttal, and ErrorReview classes are actually subclasses of the Review Class (See Figure 7).

### Major Objects in CR.Web.Control

The CR.Web.Control is the namespace that includes the set of twenty custom controls. With the same Object-Oriented Design approach, the custom controls are designed to start from the Questionnaire control (See Figure 8).

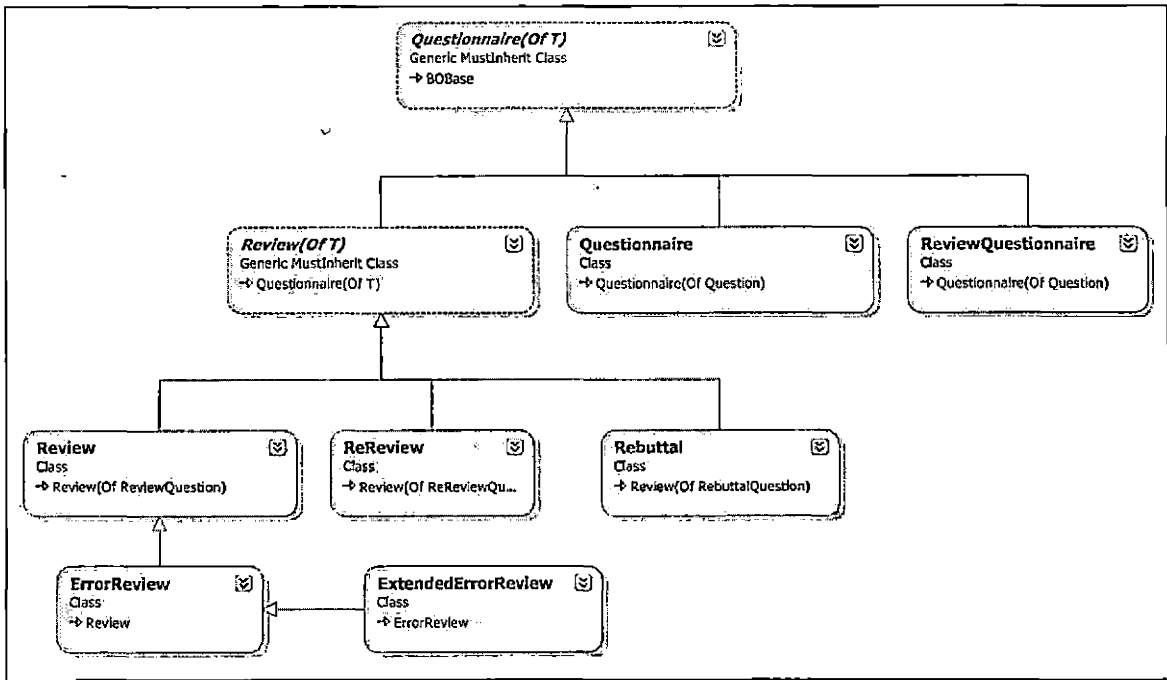


Figure 7. Review Classes

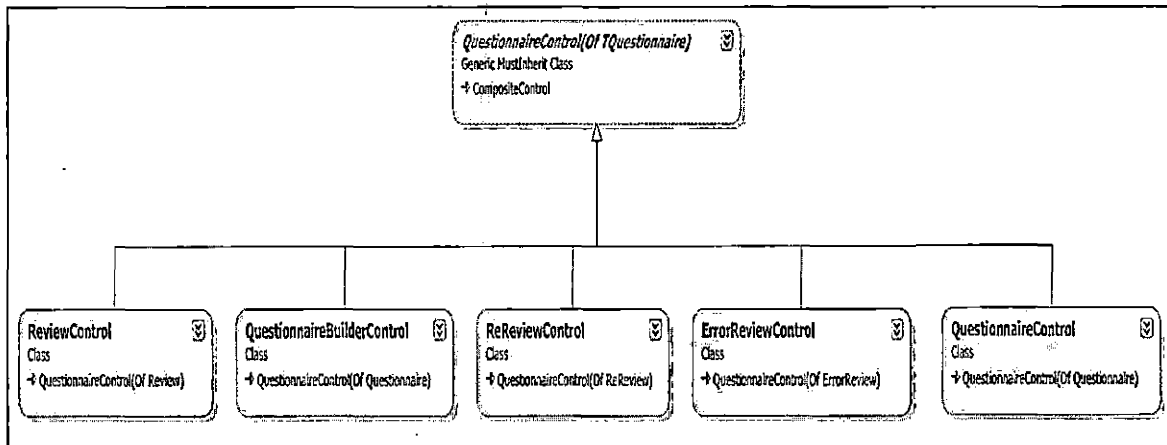


Figure 8. Custom Control Classes

## Programming Language and Technology

Due to ITSD application development standard and policy requirements, the system needs to be developed as a web solution using ASP.net. C# is the language for all project libraries including the business and data access layer. The web scripting language is in ASP. Microsoft SQL Server will be used for database services.

### ASP.Net

ASP.Net is a Microsoft web application framework which is developed for dynamic web application. The most important characteristics of ASP.net are the Common Language Runtime (CLR), Code-behind, and ASP.net page life cycle.

ASP.net uses CLR so that the coding can be done in VB.NET, C# and/or any other Dot Net languages. In the compilation process, the .Net compiler compiles the code into the Common Intermediate Language. At runtime, the Common Language Runtime compiler generates the Common Intermediate Language code into the native code. Therefore, Common Language Runtime allows cross-language integration, exception handling, security, versioning, and many other software development benefits.

Code-behind is a modeling pattern that separates the layout of the web page from the event driven code. In ASP.net, a web page is commonly presented in 2 files – the presentation file (with .ASPX file extension) and the Code-behind file (with code file extension such as .CS or .VB).



ASP.net Page Life Cycle is composed of seven main stages. The table below describes these stages:

Table 3. Page Life-Cycle Stages Table

<b>Page Life Cycle</b>	<b>Description</b>
Page Request	The page request occurs before the page life cycle begins. When the page is requested by a user, ASP.NET determines whether the page needs to be parsed and compiled (therefore beginning the life of a page), or whether a cached version of the page can be sent in response without running the page.
Start	In the start stage, page properties such as Request and Response are set. At this stage, the page also determines whether the request is a Postback or a new request and sets the IsPostBack property. (Postback is a mechanism for the communication between client side and server side in ASP.NET.) The page also sets the UICulture property. (The UICulture value determines which resources (such as the date, number, language, currency formatting and other cultural properties) are loaded for the page.)

Initialization	During page initialization, controls on the page are available and each control's UniqueID property is set. A master page and themes are also applied to the page if applicable. If the current request is a postback, the postback data has not yet been loaded and control property values have not been restored to the values from view state.
Load	During load, if the current request is a postback, control properties are loaded with information recovered from view state and control state.
Postback event handling	If the request is a postback, control event handlers are called. After that, the Validate method of all validating controls is called, which sets the IsValid property of individual validating controls and the IsValid property of the page.
Rendering	Before rendering, view state is saved for the page and all controls. During the rendering stage, the page calls the Render method for each control, providing a text writer that writes its output to the Output Stream object of the page's Response property.

Unload	The Unload event is raised after the page has been fully rendered, sent to the client, and is ready to be discarded.  At this point, page properties such as Response and Request are unloaded and cleanup is performed.
--------	--

Source: "ASP.NET Page Life Cycle Overview." MSDN Library, Microsoft Corporation, May 2010. [2]

## C Sharp

C Sharp (C#) is a multi-paradigm programming language developed by Microsoft with the Dot Net initiative. C# was also approved by ECMA and ISO.

C# is chosen as the programming language for this project because it:

- supports Object-Oriented Design.
- is a Dot Net programming language.
- has very strong type safety.
- has syntax and keywords similar to C and C++.
- includes automatic garbage collection.
- uses delegates rather than function pointers for increased type safety and security

Visual Basic .Net (VB.Net) and C# are the common languages in Dot Net web application development. There are some advantages and disadvantages of one language over the other. This is a matter of personal preference, which is

likely to depend on the previous programming experience of the programmer. For Visual Basic 6 developers, VB.Net is a lot friendlier than C#. However, for Java, C or C++ programmers, C# syntax and keywords are not so much different. I chose C# over VB.Net. C# allows programmers to use pointers and directly memory access. C# does not allow undeclared variables, un-typed variables, and un-typed methods like in VB.Net. C# binding is early, which help programmers catch errors easily. More importantly, C# compilers exist for almost all non-Microsoft platforms such as Mac, Linux, Windows, Solaris, etc. This is not true for VB.Net

The following figure shows C# code captured from the MCRS project and illustrates the implementation of an object and its functions.

```
namespace CR.Business
{
    public class ReReview : Review<ReReviewQuestion>
    {

        #region Private Properties
        private System.Nullable<DateTime> _restarted;
        private System.Nullable<DateTime> _recompleted;
        private CR.Business.Person _reviewer;
        private string _rereviewerID;
        private string _comments;
        #endregion

        #region Constructors
        public ReReview()
        {
            _isNew = true;
        }

        public ReReview(int, id)
        {
            if (Load(id))
            {
                _isNew = true;
            }
        }
        #endregion
    }
}
```

```

#region Public Properties
public System.Nullable<DateTime> ReStartDate
{
    get
    {
        return _restarted;
    }
    set
    {
        if (_restarted != value)
        {
            _restarted = value;
            base._isDirty = true;
        }
    }
}
public System.Nullable<DateTime> ReCompletedDate
{
    get
    {
        return _recompleted;
    }
    set
    {
        if (_recompleted != value)
        {
            _recompleted = value;
            base._isDirty = true;
        }
    }
}

public Person ReReviewer
{
    get
    {
        if (_reviewer == null)
        {
            _reviewer = new Person(_reviewerID);
        }
        return _reviewer;
    }
    set
    {
        _reviewer = value;
        _rereviewerID = (string) value.UserID;
        _isDirty = true;
    }
}

public string ReReviewComments
{
    get
    {
        return _comments;
    }
}

```

```

        set
        {
            if (_comments != value)
            {
                _comments = value;
                base._isDirty = true;
            }
        }
    }
    public override ReviewStatus Status
    {
        get
        {
            return DetermineStatus(_restarted, _recompleted);
        }
    }
}
#endregion

#region Private Methods
protected internal override bool Load(int id)
{
    DataRow dr;
    DataTable dt;

    if (id < 1){
        return false;
    }

    dt = CR.Data.DBReview.Load(id);
    if ((dt != null) && dt.Rows.Count > 0){
        dr = dt.Rows[0];
        try
        {
            Load(dr);
            base.ID = id;
            _isDirty = false;
            return true;
        }
        catch (Exception ex)
        {
            _log.LogError(ex);
            return false;
        }
    }
    else{
        return false;
    }
}
}

```



from the server asynchronously in the background without re-rendering the entire display and behavior of the existing page. The MCRS utilizes AJAX for the following benefits:

- Reduced time spent to complete a particular task and only refresh the necessary portion of the page instead of reload the whole page
- Reduced the bandwidth consumed by completing the only requested task
- Reduced the number of steps to complete a task
- Improved application responsiveness

The following scenario is a simple example of implementing AJAX in the Case Review System. For instance, the District Office Lookup screen (See Figure 7) is fully Ajax implemented.



☐ Look Up Table - District Office

Region Name	District	Code	Description	Edit	
Region 1	San Bernardino - 01	01	SB TAD 01/ESP/Child Care/PID	Edit	✕
	San Bernardino - 02	02	SB TAD 02/ESP/Child Care/PID	Edit	✕
Region 2	District Ontario - 75	75	Ontario 75	Edit	✕
	Ontario - 15	15	Ontario TAD/ESP/Child Care/PID	Edit	✕
	Rancho Cucamonga - 25	25	Rancho Cucamonga TAD/ESP/Child Care/PID	Edit	✕
Region 3	Adelanto - 48	48	Adelanto TAD/ESP/Child Care	Edit	✕
	Barstow - 06	06	Barstow TAD/ESP/Child Care/PID	Edit	✕
	Hesperia - 08	08	Hesperia TAD/ESP/Child Care/PID	Edit	✕
	Hesperia - 26	26	Hesperia Medi-cal/ESP Job Services	Edit	✕
	Needles - 10	10	Needles TAD/ESP/Child Care/DCS/DAAS/PID	Edit	✕
	Victorville - 18	18	Victorville TAD/ESP/Child Care/PID	Edit	✕

Figure 10. District Office Lookup Page

Let us review the Ajax implementation with the delete function in this District Office Lookup page. User will initiate the command by clicking on the "X" icon on a selected record. Then, the "X" icon will invoke the JavaScript method called "DeleteOfficerWConfirmation". The implementation is as follows:

```
function DeleteOfficerWConfirmation(strRID) {
    var agree = confirm("By deleting this Office, you will be deleting all
    associated units. Would you want to delete the District Office?");
    if (agree) { //if user click OK
```

```

//Making an AJAX call to the server side method named
//DeleteOffice to perform the deletion
Anthem_InvokePageMethod("DeleteOffice", [strRID],
function(result) { // this function will be execute afterward
    //”result” is the return value of DeleteOffice method
    If (result.value) {
        alert("This office has been deleted");
    }
    else {
        alert("Error occurred! This office cannot be
        deleted");
    }
});
}
}

```

In the above JavaScript function, after sending a confirmation to the user, the function continues to call the JavaScript Ajax method named Anthem\_InvokePageMethod. This JavaScript Ajax method has three parameters: the server-side function name, the parameter array to be passed to the server-side function, and the Javascript function code with the return value of the server-side function. This Anthem\_InvokePageMethod Ajax method allows making a call

directly from a client-side JavaScript function to a server-side method. In this case, the server-side method named DeleteOffice is called. This DeleteOffice method is implemented as follows:

```
<Anthem.Method()> _  
  
Public Function DeleteOffice(ByVal id As String) As Boolean  
    Dim officeid As New System.Guid(id)  
    _office = New CR.Business.Office(officeid)  
    _office.updatedBy = m_UserID  
    _office.updatedOn = Now  
    If _office.Delete() Then  
        LoadOfficeList() // refresh the office list after deleting record  
        Return True  
    Else  
        Return False  
    End If  
End Function  
  
Private Sub LoadOfficeList()  
    Dim dv As DataView  
    dv = Office.GetListOfficeDT().DefaultView  
    gv_OfficeList.DataSource = dv
```

```
gv_OfficeList.DataBind()  
gv_OfficeList.UpdateAfterCallBack = True
```

End Sub

Overall, the server-side method DeleteOffice is implemented as any other normal server-side method. In this case, the Office object is created, and the delete public method is called to deactivate the mentioned Office record. After the deletion, the server-side method named LoadOfficeList is called to refresh the new list of offices. With Ajax, we do not want the whole screen to be post-backed after the deletion. On the browser, the only change required after the deletion is the ASP.net Gridview control. Therefore, the property UpdateAfterCallBack is set equal to true on the gv\_OfficeList Gridview control. This entire Ajax implementation makes the delete function become very fast and friendly without any screen post-back.

CHAPTER FOUR  
DATABASE DESIGN

Tables and Attributes

The Case Review database consists of the following tables and attributes:

Table 4. Database Tables and Attributes

Table	Attribute	Description
Answer		Stores all possible answers for a given question.
	AnswerID	Primary Key identifying the Answer in the local db.
	QuestionID	Foreign Key identifying the question with which this answer is identified.
	AnswerValue	Value/text of answer
	DisplayOrder	Display order of answer
	ValidatorID	Foreign Key identifying the validator with which this answer is identified.
AnswerType		Stores the possible control types that can be used for certain question type (ex. Dropdown List, Radio Button control can be used for single choice question. Checkbox list can be used for multiple choice questions.)
	AnswerTypeID	Primary Key identifying the Answer Type in the local db.

	ControlTypeID	Foreign Key identifying the Control Type with which this answer type is identified.
	QuestionTypeID	Foreign Key identifying the Question Type with which this answer type is identified.
ApplicationReport		Stores the list of reports built in the system including all of its properties
	ReportID	Primary Key identifying the Application Report in the local db.
	ReportTypeID	Foreign Key identifying the Report Type with which this Application Report is identified.
	ReportScope	Scope of report such as region, office, unit
	ReportName	Name of report
Case		Stores all cases in a normalized way, that come from C-IV or manual entry
	CaseID	Primary Key identifying the Case/File in the local db
	ProgramID	Foreign Key identifying the program with which this Case is identified.
	DistrictOfficeID	District office ID, links to the District Office Table
	CaseSerialNumber	Identify a case uniquely within a county. It is the Case Number that is familiar to the customer and worker and appears on pages, reports and forms and is used for lookup in C-IV system.
	CaseName	Case Name is made of first name, middle name and last name for the person asking for medical benefits.

	Case workerNumber	This is a worker number kept here for tracking purposes.
	CaseworkerID	Worker ID pointing to the Users table.
	Case workerSupervisorID	This is the ID from Safe and represents the Worker supervisor.
	Case workerSupervisor WorkerNumber	Supervisor worker number kept here for tracking purposes.
	ApplicationDate	This is the application date and is used in Intake Cases
	AuthorizationDate	Date the benefits recipient was initially authorized to begin receiving program benefits (this value may be greater than, less than, or equal to the Application Date)
	IsManualEntry	Boolean value (0=false, 1=true) indicating this Case was not identified in the C-IV system and needed to be manually entered (Intake Cases may be an example of this)
CasePull		Stores the case-pulls information
	CasePullID	Internal Unique Identifier.
	ProgramID	The program ID this review belongs to Medical in this case.
	ReviewMonth	Link to refReviewMonth table
	CasePullByID	User ID of person who pulled this case
	CasePullOn	Date when this case is pulled
	Case workerID	User ID of person who worked on this case

	Case workerNumber	Case Worker Number of person who worked this case
	CreatedOn	Date when the review was created.
	CreatedBy	User ID of person who created the review
	ModifiedOn	Date when was the last time that someone saved the review
	ModifiedBy	User ID of person who was the last one saving the review
CaseRepull		Stores the case-repulls information
	CaseRepullID	Internal Unique Identifier.
	CaseRePullOn	Date when this case is re-pulled.
	CaseRePullByID	User ID of person who is re-pulled this case. This is linked to the person table.
	OriginalCaseID	Original Case ID
	CaseReviewID	Foreign Key identifying the case review with which this Case Re-pull is identified.
CaseRereview		Stores re-reviews data
	CaseReviewID	Foreign Key identifying the case review with which this Case Re-review is identified.
	CaseRereviewerID	Internal Unique Identifier.
	CaseRereviewStart Date	Date the re-review has been initiated (a null value indicates the re-review has not yet been started).
	CaseRereviewCompletedDate	Date the re-review has been submitted (a null value indicates the re-review has not yet been completed).



CaseRereviewAnswerItem		Stores answers of the re-review Questions
	CaseReReviewAnswerItemID	Internal Unique Identifier.
	IsRereviewDiscrepancy	Boolean value (0=false, 1=true) indicating whether or not the re-reviewer disagree with the reviewer's answer.
	CaseReviewID	Foreign Key identifying the case review with which this Case Re-review Answer Item is identified.
CaseReview		Stores Reviews data
	CaseReviewID	Internal Review ID Primary Key
	CaseID	Case ID
	CasePullID	Foreign Key identifying the Pull that selected the Case ID for review.
	CaseReviewerID	Foreign Key identifying the Worker reviewing the Case, normally a Supervisor or EW3 , linked to wpid
	CaseReviewStartDate	Date the review has been initiated (a null value indicates the review has not yet been started).
	CaseReviewCompletedDate	Date the review has been submitted (a null value indicates the review has not yet been completed).
	ReviewStatusID	Foreign Key identifying the Review Status that this selected Case Review is identified.
	CaseReviewComments	Free-text from the Case reviewer

	ReviewMonth	Integer value (1-12) indicating the month the Case was pulled for review (may not be necessary since this is also available in the CasePull Table).
	ReviewQuestionarie ID	The questionnaire to be used to completed this review.
	CreatedOn	Date the Case was pulled for review (may be different from the date identified on the CasePull Table if the Case was picked using the re-pool option).
	ModifiedOn	Date when was the last time that someone saved the review.
	ModifiedBy	User ID of person who was the last one saving the review
CaseReviewAnswerItem		Stores answers of the re-review Questions
	CaseReviewAnswerItemID	Internal Unique Identifier.
	CaseReviewID	Foreign Key identifying the case review with which this Case review Answer Item is identified.
	AnswerID	Foreign Key identifying the answer with which this Case Re-review Answer Item is identified.
CaseReviewAnswerText		Stores the "free form text" answers of the Review Questions
	CaseReviewAnswerItemID	Internal Unique Identifier.
	AnswerFreeForm	Free-text answer value

CaseReviewRebuttal		Stores Rebuttal information for the Reviewed Answers
	RebuttalID	Internal Unique Identifier.
	CaseReviewAnswerItemID	Foreign Key identifying the case review answer item with which this case review rebuttal is identified.
	RebuttalDeclaration	Rebuttal Declaration
	CreatedOn	Date when this record was created
	CreatedBy	User ID of person who created this record
	CIVData	
CIVCaseID		Primary Key for Table
ProgramCode		Program Code
CaseName		Case Name
SerialID		C-IV Case ID
Caseworker		Case Worker of person who worked on the case
DistrictOfficeID		Code uniquely identifying the local District office.
StaffID		10-digit code uniquely identifying the case worker in the C-IV system which can be used to match against the local db.
WorkerLastName		Last Name of the case worker to whom the case is assigned (to be used for matching case data to local db in the event the Staff ID does not match).
WorkerFirstName		First Name of the case worker to whom the case is assigned (to be used for matching case data to local db in the event the Staff ID does not match)

	PgmId	Foreign Key identifying the Program this case is categorized under (may be redundant since ProgramID is also identified on the case Table).
	AuthorizationDate	Date the benefits recipient was qualified to begin receiving benefits (may be greater than, less than or equal to the Application Date).
	ApplicationDate	Date the benefits recipient initially applied for benefits.
	CaseFirstName	First name of the person receiving benefits.
	CaseLastName	Last name of the person receiving benefits.
	EffDate	Date the C-IV data was downloaded to local db.
Condition		Stores the list of the condition rules that are applied to the questions or groups of questions.
	ConditionID	Internal ID Unique Identifier.
ConditionRule		Stores the detailed logic of the condition rules
	ConditionRuleID	Internal ID Unique Identifier.
	ConditionID	Foreign Key identifying the condition with which this condition rule is identified.
	AnswerID	Foreign Key identifying the answer with which this condition rule is identified.
	ConditionalOperator	Value of a Boolean expression such as 0, 1, and, or.
confCasePull		Stores the configuration of case-pull process
	CasePullGroupID	Internal ID Unique Identifier.
	GroupName	Description of group name.
	NumberofCase	Number of case to be pulled of a particular case-

		pull group
confErrorCorrection		Stores the configuration of rebuttal and error correction process
	DayForRebttal	The number of days for rebuttal process
	DayForCorrectError	The number of days for correct error process
confInterface		Stores the configuration of layout of the application
	NumberofRecentReview	Number of recent Review
ControlType		Stores the Control Types such as Dropdown List, Radio Button, Textbox etc.
	ControlTypeID	Internal ID Unique Identifier.
	DataType	Text, Integer, Date
	Description	Text Box, Date Box, DropDown Box, Correct Incorrect / Na, Yes No Checkbox
ErrorCaseReview		Stores the error reviewed cases data and its correction information
	CaseReviewID	Internal ID Unique Identifier.
	CorrectionDueDate	Correction due date
	CorrectionCompletedDate	Correction completed date
	CorrectionVerifiedByID	Person who verified the correction
	IsCorrectionMade	Boolean value to indicate if the correction is made.
	OriginalCorrectionD	Original correction due date

	ueDate	
	ExtendedBy	Person who extended the correction due date
	ExtendedOn	Date when correction due date was extended
	ReasonOfExtention	Reason of correction due date extension
GroupCondition		Stores the condition of whether or not the group of a questionnaire will be skipped
	ConditionID	Foreign Key identifying the condition with which this group condition is identified.
	QuestionGroupID	Internal ID Unique Identifier.
Person		Stores All Personnel related to the Case Review App
	UserID	The County Employee ID and the link To SAFE, not everybody has a SafeUserID (Employee id)
	DistrictManagerID	District Manager of this person.
	FirstName	First name of the person.
	LastName	Last name of the person.
	MiddleName	Middle name of the person.
	Email	Email can be used for communication purposes not yet defined.
	PhoneNumber	Phone number for this person.
	PositionID	Foreign Key identifying the position with which this person is identified.
	CasePullGroupID	Foreign Key identifying the case pull group with which this person is identified.
	SupervisorID	Supervisor of this person
IsSupervisor	Boolean to indicate whether or not the person is	

		a supervisor.
	IsDistrictManager	Boolean to indicate whether or not the person is a district manager.
	IsActive	Indicate if this Person Active.
	CreatedOn	When this record was created
	CreatedBy	Who created this record
	UpdatedOn	Date when was the last time that the record was updated
	UpdatedBy	User ID of person who was the last one to update this record
Question		Stores all the questions that the user can choose to build a questionnaire
	QuestionID	Identifier for question table.
	QuestionGroupID	Foreign Key identifying the question group type with which this question is identified.
	AnswerTypeID	Foreign Key identifying the answer type with which this question is identified.
	Question	Text of the question
	Toolbox	This text is the help description for user review questions.
	DisplayOrder	This number for question display order.
	LayoutModelID	Link to refLayoutMode table.
	isRequired	This for validate required field when user review the case.
	EnteredBy	User ID of person who created this record.
	EnteredOn	Date when this record was created.

QuestionCondition		Stores the condition of the question
	ConditionID	Primary Key identifying the unique record for this table.
	SetAnswerID	Foreign Key identifying the set answer with which this question condition is identified.
QuestionGroup		Stores all the groups of the different questionnaire
	QuestionGroupID	Primary Key identifying the unique record for this table.
	ReviewQuestionnaireID	Foreign Key identifying the questionnaire this group will show in.
	QuestionGroupDescription	Text value to be shown in the questionnaire.
	ProgramID	Foreign Key identifying the program with which this question group is identified.
	DisplayOrder	Display order of question group
QuestionType		Stores the kind of questions such as pre-built standard format, multiple choice, single choice and free text field.
	QuestionTypeID	Identifier for question type table.
	Description	Description of the question type, that display on the screen.
	ProgramID	Foreign Key identifying the program with which this question type is identified.
	ScreenshotURL	This is an image of question type address, when user select different question type and the screen



		will show different type image.
RebuttalConclusion		Stores the conclusions to a rebuttal request
	ConclusionID	Primary Key identifying the unique record for this table.
	RebuttalID	Foreign Key identifying the rebuttal with which this rebuttal conclusion is identified.
	isErrorRemoved	Boolean that indicate whether or not the error was removed
	ConclusionDesc	Conclusion Description
	RespondedBy	Person who responded the rebuttal conclusion
	RespondedOn	Date when the rebuttal conclusion was responded
refDistrictOffice		Stores all the different District Offices for the workers.
	DistrictOfficeID	Primary Key identifying the unique record for this table.
	RegionID	The Region this office belongs 2, Link to Region Table
	OfficeName	The Office name can be something like 02,03,04,05.
	BuildingName	Building name 29 Palms, Ontario TAD etc.
	IsActive	Indicate if the Region is Active
	CreatedBy	Who created this record.
	CreatedOn	When this record was created
	UpdatedBy	User ID of person who was the last one to update this record.

	UpdatedOn	Date when was the last time that the record was updated.
refLayoutMode		Stores the options of a questions layout in a questionnaire
	LayoutModelID	Primary Key identifying the unique record for this table.
	LayoutModeDesc	Layout mode description
refProgram		Stores the Program information (the current system only support Medical Program)
	ProgramID	Primary Key identifying the unique record for this table.
	Program	The Program, this case is MEDI-CAL, but the system allows having more program in the later phase
	ProgramShortName	The program Short Name MD = medical, FS= food stamps, etc
	EnteredBy	Identifies the person who initially created this record.
	EnteredOn	Date the record was initially created.
	UpdatedOn	When the record was updated last.
	UpdatedBy	Who was the last one to update this record.
	Active	Boolean (0=false, 1=true) value indicating whether or not this program is considered to be in use for continuing case reviews.
refRegion		Stores all Regions and function as a lookup
	RegionID	Primary Key identifying the unique record for this

		table.
	RegionName	Region Name
	CreatedOn	Date when this record was created.
	CreatedBy	User ID of person who created this record.
	UpdatedBy	User ID of person who was the last to update this record.
	UpdatedOn	User ID of person when was the last time that the record was updated.
refReportParameter		Stores the parameters in the report module
	ParameterID	Primary Key identifying the unique record for this table.
	ParaDescription	Parameter description
refReportType		Stores the report type
	ReportTypeID	Primary Key identifying the unique record for this table.
	Description	Report type description
refReviewMonth		Stores all review months and control what is the Current Active Month for the application.
	ReviewMonth	The Review Month that the users will see in the screen, example 082007, 072007, etc.
	Description	Description of the review month, example 082007, 072007.
	IsActive	Represent if the month is available as current choice.
	UpdatedBy	User ID of person who updated this record last.
	UpdatedOn	Date when the record was updated last.

	EnteredBy	User ID of person who created this record
	EnteredOn	Date when the record was created.
refReviewStatus		Stores the review's status options
	ReviewStatusID	Identifier for Review status table.
	ReviewStatusDesc	Description of the review status, that display on the screen.
refReviewType		Stores the Review Types for a given program and represent the kinds of reviews that the application can do like Intake or Continuing review types.
	ReviewTypeID	Identifier for Review Type Table
	ReviewTypeName	The Review kind like Continuing or Intake.
	ProgramID	The program ID this reviews belongs to Medical in this case.
	UpdatedOn	Date when the record was updated last.
	UpdatedBy	User ID of person who updated the record last.
	EnteredOn	Date when the record was created.
	EnteredBy	User ID of person who created this record
	IsActive	Indicate if this review type active.
	refStandardQuestionTypeAnswer	
StandardQuestionTypeID		Primary Key identifying the unique record for this table.
AnswerValue		Answer value
DisplayOrder		Display Order
refValidator		Stores the validation "regExpresion" for the

		freeform fields in the questionnaires.
	ValidatorID	Internal ID Unique Identifier.
	Description	Description
	regExpression	Custom expression string that will validate user entered information.
	regExMessage	Validate message that will display on alert warning, when user submit but not correct and required every fields.
ReviewQuestionnaire		Stores the questionnaires built by the end user
	ReviewQuestionnaireID	Primary Key identifying the questionnaire
	ReviewTypeID	The type of review this Questionnaire is about, Link to Review Type Table.
	ReviewMonth	Integer value (1-12) identifying the month this questionnaire pertains to (may be insufficient or unnecessary).
	ProgramID	Foreign Key identifying the Program for which this questionnaire is used.
	ReviewMonthAfterAuthorizationDate	Review month after authorization date
	isRereviewNeeded	Boolean value (0=false, 1=true) indicating whether or not reviews using this questionnaire require a re-review.
	QuestionnaireName	Intake questionnaire , or Continuing Questionnaire
	QuestionnaireDescription	Free-Text value used to describe the

	ption	questionnaire.
	DisplayOrder	Display order
	EnteredBy	User ID of person who created this questionnaire.
	EnteredOn	Date when the record was created.
	OutServiceMonth	Date when was taken out of service.
	UpdatedBy	Identifies the person who last made modifications to this questionnaire.
	UpdatedOn	Date when this questionnaire was last modified.
	isActive	Boolean value (0=false, 1=true) indicating whether or not this questionnaire is considered in use for current case reviews
Worker Number		Stores all worker numbers related to personnel
	WorkerNumberID	Internal ID Unique Identifier.
	WorkerNumber	CIV Worker Number The current format as 2 d{County}2 d {Office} 4 d{WorkerID}
	UserID	The county employee ID for this worker, link To person.
	DistrictOfficeID	Link to refDistrictOffice table
	DateStart	Start date for this worker use the worker number.
	DateEnd	End date for this worker use the worker number.

### Database Diagram

(See Appendix A for the Database Diagrams)

CHAPTER FIVE  
SYSTEM SPECIFICATIONS

Case Review System has the following modules (See Appendix B for the detailed specifications):

Table 5. Case Review List of Modules

Module	Functions
Master Page	<p>This page should provide the following features:</p> <ol style="list-style-type: none"> <li>1. The Main menu and navigation of the application (Shortcut to main pages and a short cut to the last 10 reviewed cases.)</li> <li>2. The current logged on user and his/her profile.</li> <li>3. The ability to change the review month. (The review month will be defaulted in current month.)</li> <li>4. A shortcut to locate a case by using the case number.</li> </ol>
Your Desktop	<p>This page should provide the following features based on logged on user's profile:</p> <ul style="list-style-type: none"> <li>• Manager / Resource Supervisor / Corrective Action Supervisor / Corrective Action Coordinator</li> </ul>

	<ul style="list-style-type: none"><li>1) The "My district review progress" stacked cylinder chart to compare between the current review progress and the last month review</li><li>2) The "My district review performance" stacked bar chart to represent the review performance among of the reviewer within a district</li></ul> <ul style="list-style-type: none"><li>• Reviewer / Supervisor<ul style="list-style-type: none"><li>1) The logged on user's review summary including the number of reviews with different review status (pending, completed, completed with error, not started)</li><li>2) The list of workers that the current logged user is reviewing in the current month with the count of number reviewed cases and the rebuttal requests</li></ul></li><li>• Case worker<ul style="list-style-type: none"><li>1. The Case worker's reviewed cases with the number of errors and corrections information</li><li>2. The logged on user's rebuttal requests and its rebuttal status</li></ul></li></ul>
--	--



Case Selector	<p>This page should provide the following features:</p> <ol style="list-style-type: none"> <li>1. The ability to pull the cases from C-IV database to perform different types of review (<i>Tier I or Tier I re-review...</i>).</li> <li>2. The ability to randomly generate the list of cases to review for the worker based on the review month, district and worker status (<i>ex. regular, performance issues.</i>)</li> <li>3. The ability to check the review status and continue reviewing the "pending" reviews</li> <li>4. The ability to manually add a case that does not exist in C-IV database</li> <li>5. The ability to print the list of cases</li> </ol>
Case Rebuttals	<p>This page should provide the following features:</p> <ol style="list-style-type: none"> <li>1. The ability to locate the reviews that have the rebuttal request(s) by using different criteria such as <i>case number, case name, reviewer, district, case worker</i></li> <li>2. The ability to approve or disapprove the rebuttal requests</li> </ol>

Corrections Due	<p>This page should provide the following features:</p> <ol style="list-style-type: none"> <li>1. The ability to locate the cases with error that required corrections by district, case worker and reviewer</li> <li>2. The ability to set the <i>Corrections Completed Flag</i> and <i>Completed Date</i> for an individual case review</li> <li>3. The ability to extend the <i>Correction Due Date</i></li> </ol>
History Search	<p>This page should provide the following features:</p> <ol style="list-style-type: none"> <li>1. The ability to Search for cases by using the different filters such as <i>review months, case number, file number, review type, reviewer, and review status</i></li> </ol>
Main Reports	<p>This page should provide the following features:</p> <ol style="list-style-type: none"> <li>1. A screen where the user can get the System Reports by selecting the report parameters.</li> </ol>
Administration	<p>This page should provide the following features:</p> <ol style="list-style-type: none"> <li>1. The ability to adjust the application settings and business rule variables (for IT staff use only).</li> <li>2. The ability to maintain the lookup tables.</li> <li>3. The ability to manage the application security settings.</li> </ol>

	4. The ability to build / modify the questionnaire reviews
--	--

The Case Review System consists of the following main screen (See Appendix C for the detailed specifications).

- Master page (masterPage.master)
- My desktop (default.aspx)
- Search page (search.aspx)
- Case selector page (caseselector.aspx)
- Continuing case selector page (continuingcaseselector.aspx)
- Intake case selector page (intakecaseselector.aspx)
- Case review page (casereview.aspx)
- Case review manager page (casereviewmanager.aspx)
- Case re-review manager page (casereviewmanager.aspx)
- Score card (scorecard.aspx)
- Toolbox (toolbox.aspx)
- My cases (mycases.aspx)
- Rebuttal request page (rebuttalrequest.aspx)
- Rebuttal page (rebuttal.aspx)
- Rebuttal process page (rebuttalprocess.aspx)
- Correction due page (correctiondue.aspx)

- Manager desktop page ([managerdesktop.aspx](#))
- Report page ([report.aspx](#))
- Administration page ([admin/default.aspx](#))
- Application settings page ([admin/applicationsettings.aspx](#))
- Business rules page ([admin/businessrules.aspx](#))
- Table maintenance page ([admin/maintenance.aspx](#))
- Questionnaire page ([admin/questionnaire.aspx](#))
- Questionnaire builder page ([admin/questionnairebuilder.aspx](#))
- New question page ([admin/questionchoice.aspx](#))
- Question page ([admin/question.aspx](#))
- Group conditions page ([admin/grouppcondition.aspx](#))
- Question conditions page ([admin/questioncondition.aspx](#))
- User administration page ([admin/adminuser.aspx](#))

## CHAPTER SIX

### REPORT SPECIFICATIONS

The following reports are required in the Case Review system (see Appendix C for the detailed specification):

1. Discrepancy found by Re-Reviewer Detail
2. Top 5 Discrepancy found by Re-Reviewer Error Trend
3. Reviewer Proficiency Report
4. Incomplete reviews By Reviewer
5. Incomplete re-reviews By Re-Reviewer
6. Completed Counts By Reviewer
7. Completed Counts By Re-Reviewer
8. Delinquent Case Corrections
9. Corrections Completed Detailed Report
10. Rebuttal Removed Report
11. Case Review Summary Report
12. Detail Report-County by Region
13. Detail Report-District by Supervisor
14. Detail Report-Region by District
15. Detail Report-Supervisor by Worker
16. Detail Report-Worker by Question-Group (option by Date)
17. Detail Report-Worker by Question-Group by (option by Question)

18. Top 5 Error Trend Report-County
19. Top 5 Error Trend Report-District
20. Top 5 Error Trend Report-Region
21. Top 5 Error Trend Report-Supervisor
22. Top 5 Error Trend Report-Worker

CHAPTER SEVEN  
SYSTEM VERIFICATIONS

Items and Functions to be Tested

ITSD has its own Software Quality Assurance unit who is responsible for the system testing. The following functional requirements were categorized in high priority testing list:

Table 6. High Priority Testing Items

Test Item #	Description
H-1	Only the authorized users can access the application.
H-2	The application must protect data from unauthorized access.
H-3	The application need to provide administrative functionality to maintain users, user roles, and maintenance tables.
H-4	The application need to allow multiple users to use the application concurrently.
H-5	The application need to reduce input errors through system standards and input validation.
H-6	The application will include functionality for the reviewer to pull a random sampling of fifteen cases per worker per month.

H-7	The application need to include functionality to complete a Full Continuing or Intake case review.
H-8	The application need to include functionality for the case worker to summit the rebuttal process.
H-9	The application need to include functionality to remove errors from the worker stats in the rebuttal process.
H-10	The application will provide the ability to print blank review form showing all questions for the review type selected.

### Test Run Procedures and Results

The following table demonstrates the test run procedures and results:

Table 7. Test Run Procedures and Results

Test Item #	Test run procedure(s)	Expecting Result	Status
H-1	Authorized user opens the web browser and navigates to the Case Review System.	The system authenticates authorized user and redirect the logged	Passed



		on user to the My Desktop page.	
H-1	Unauthorized user opens the web browser and navigates to the Case Review System.	The system denies the user access and redirects the user to the Error page.	Passed
H-2	<ul style="list-style-type: none"> <li>• A Reviewer enters into the Case Review system.</li> <li>• The reviewer then navigates to the Administration page.</li> </ul>	The system verifies the authorizations of the logged in reviewer and disables all links in the administration page except the User Look-up link.	Passed
H-3	<ul style="list-style-type: none"> <li>• A System Administrator enters into the Case Review system.</li> <li>• The Administrator then navigates to the Administration page.</li> <li>• From the Administrator page, the logged in Administrator</li> </ul>	The logged in administrator has full access to perform the administrative tasks.	Passed

	<p>access the User Administration, Table Maintenance, Review Manager, and many other administrative page to perform the administrative tasks.</p>		
H-4	<ul style="list-style-type: none"> <li>From different machines, the user A and user access the Case Review system at the same time.</li> <li>Also, the concurrency and stress test is performed using Mercury - an automated testing tool.</li> </ul>	<p>The application allows more than 10000 concurrent users accessing the system at the same time without any problem or delay.</p>	Passed
H-5	<ul style="list-style-type: none"> <li>An authorized user navigates to the Advanced Search page.</li> <li>He or she then tries to enter the text "john doe" into the Case Number text box.</li> </ul>	<p>The system validates the input data and returns an error message to prevent the non-numeric data in the Case Number text box.</p>	Passed
H-6	<ul style="list-style-type: none"> <li>A reviewer navigates to the</li> </ul>	<p>The system randomly</p>	Passed

	<p>Case Selector page.,</p> <ul style="list-style-type: none"> <li>• He or she selects a case worker and then click the Pull Cases button.</li> </ul>	<p>returns 15 cases assigned to the selected case worker.</p>	
H-7	<ul style="list-style-type: none"> <li>• A reviewer navigates to the Case Selector page and then pulls the set of random cases from a case worker.</li> <li>• He or she then selects a case and goes through the questionnaire to review the selected case.</li> </ul>	<p>The system allows the user to go through all questions and finish the review. Before submitting the review to the database, the system also performs the validation checks.</p>	Passed
H-8	<ul style="list-style-type: none"> <li>• If there is an error found in a review, the system emails to the responsible case worker.</li> <li>• The case worker follows the link included in the email to be navigated to the Rebuttal Request page.</li> <li>• The case worker then can rebut</li> </ul>	<p>The system records the rebuttal request into the database and sends an email to the reviewer, the reviewer supervisor, and the case worker supervisor.</p>	Passed

	for any unexpired error by entering the rebuttal declaration.		
H-9	After received an emailed from the system notified the rebuttal request, the reviewer can review the rebuttal declaration, and remove the error if the rebuttal request is correct.	The system records the rebuttal conclusion in the database. The successful rebuttal error will be removed out in the report.	Passed
H-10	From the case selector page. User can click on the link said "print blank review sheet".	The system returns a blank questionnaire review.	Passed

## CHAPTER EIGHT

### CONCLUSIONS

#### Summary

This project is completed successfully on time and under budget and is currently being used in the production by about four thousand users. Within a month being in production, the Case Review System had served more than ten thousand case reviews and about five hundred of rebuttal claims. ITSD received a lot of positive feedback about the system. Commented by the Corrective Action Coordinator of the County of San Bernardino and TAD management, the system has truly contributed the following benefits to the TAD department:

- MCRS improves the integrity and productivity of the case review business. It helps increasing the sufficiency and effectiveness of review process.
- MCRS allows the TAD staffs to review the real-time data in C-IV database for the timely corrections.
- MCRS also works as a collaboration, knowledge discovery and training tools. It helps caseworker to get on the right track and keeps everyone on the same page in maintaining the integrity of the social service programs.

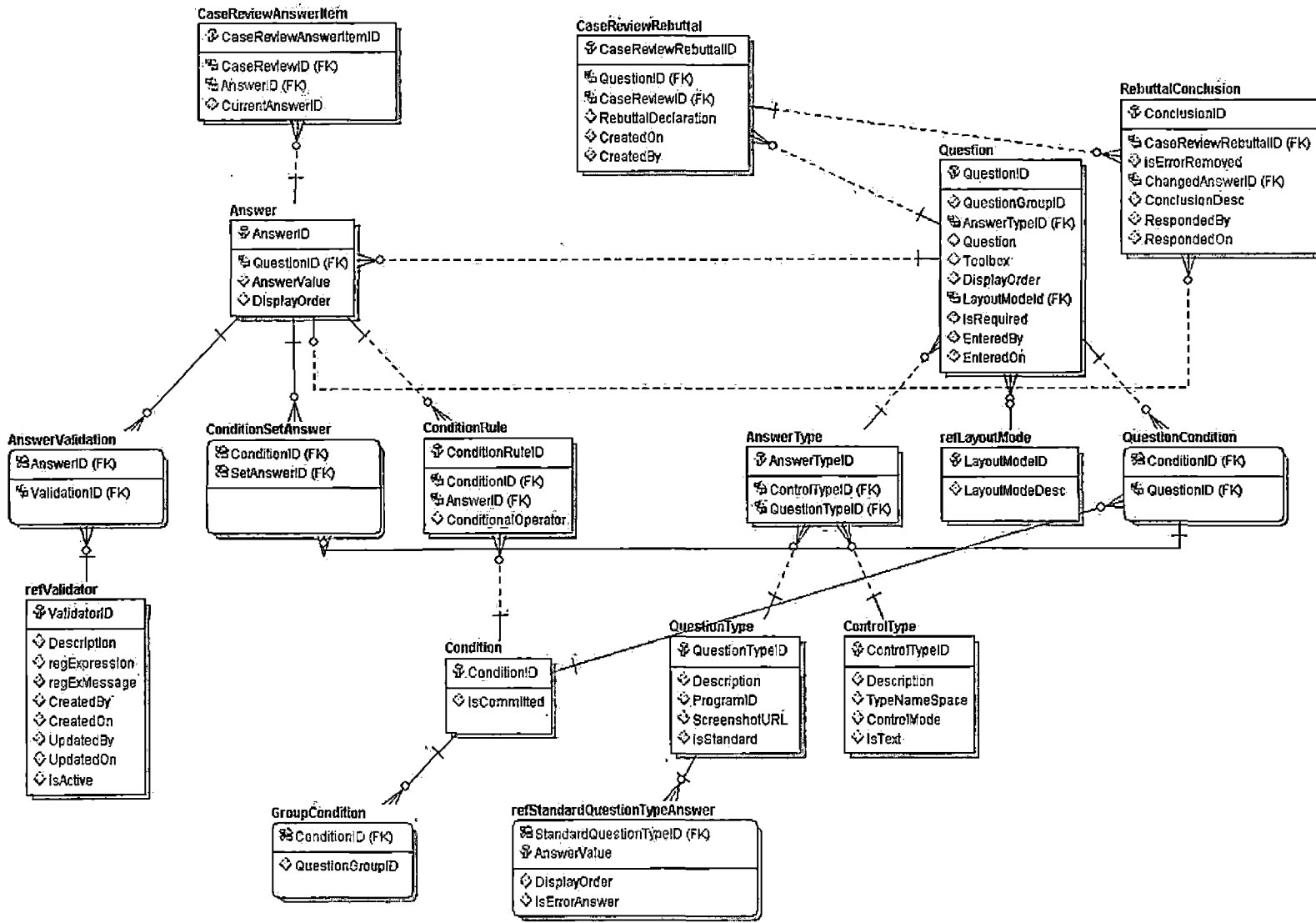
#### Suggestions for Future Extensions to Project

In the current phase, this Case Review System only supports Medi-Cal case review process. Since the Medi-Cal case review business is similar to the

other welfare programs case review business; this automated system can be served as the framework of the other case review programs. Taking this into consideration, the core engine of the system will be able to support multiple reviews and programs. The next phase of this project will be adding CalWORKs and Food Stamp program into this Case Review System.

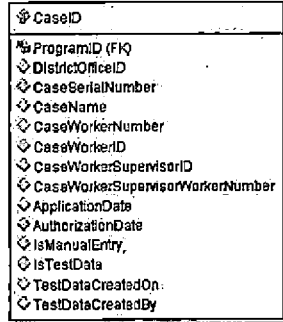
Currently, the report query directly the production database, and the average response time for the most complex report takes up to thirty seconds. This problem can be improved by implementing an OLAP database for multi-dimensional analytical queries and providing better data mining tools. Also, the user experience can be improved by implementing the Request-response design pattern in which the user can make a request for a particular report to a Report Replier module. After processing the report requests, the Report Replier module delivers the requested report straight to the user inbox.

APPENDIX A  
DATABASE DIAGRAM

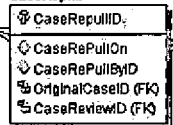




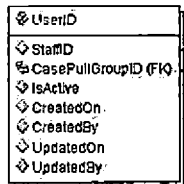
Case



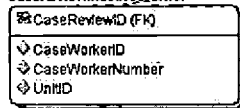
CaseRepull



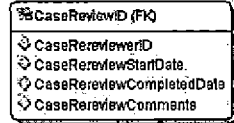
Person



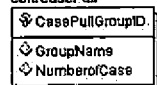
CaseReviewInactiveWorker



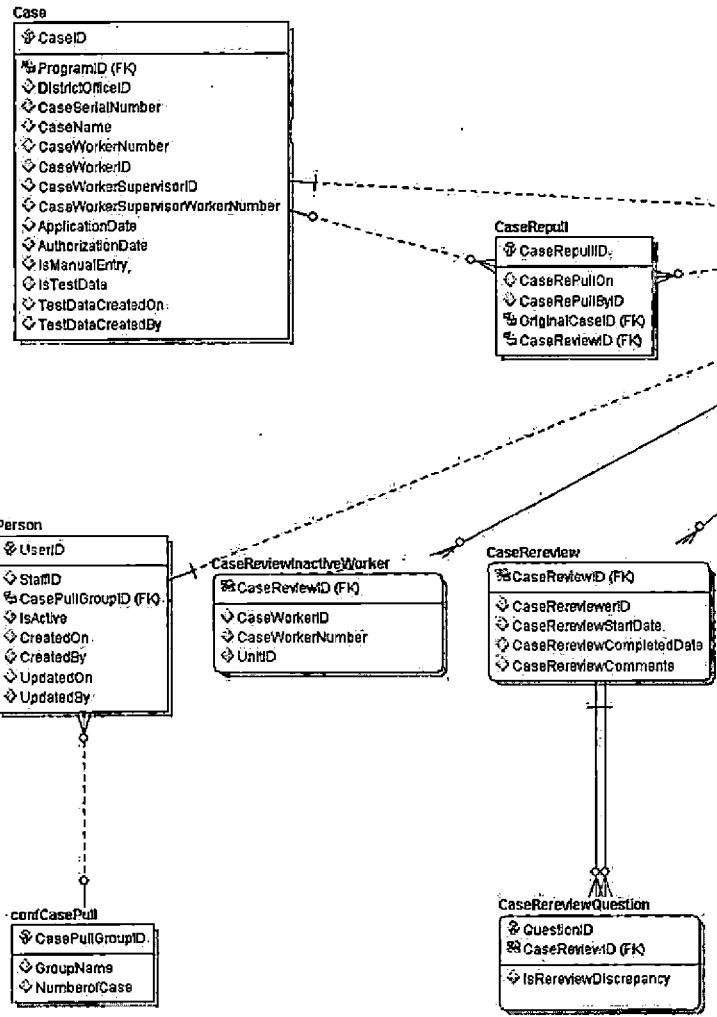
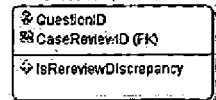
CaseReview

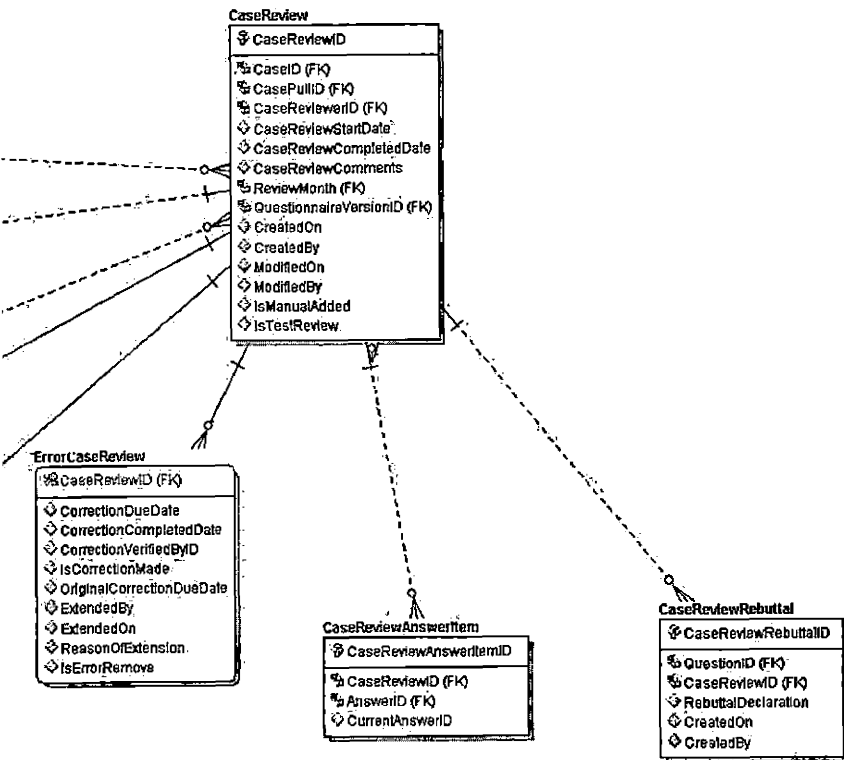


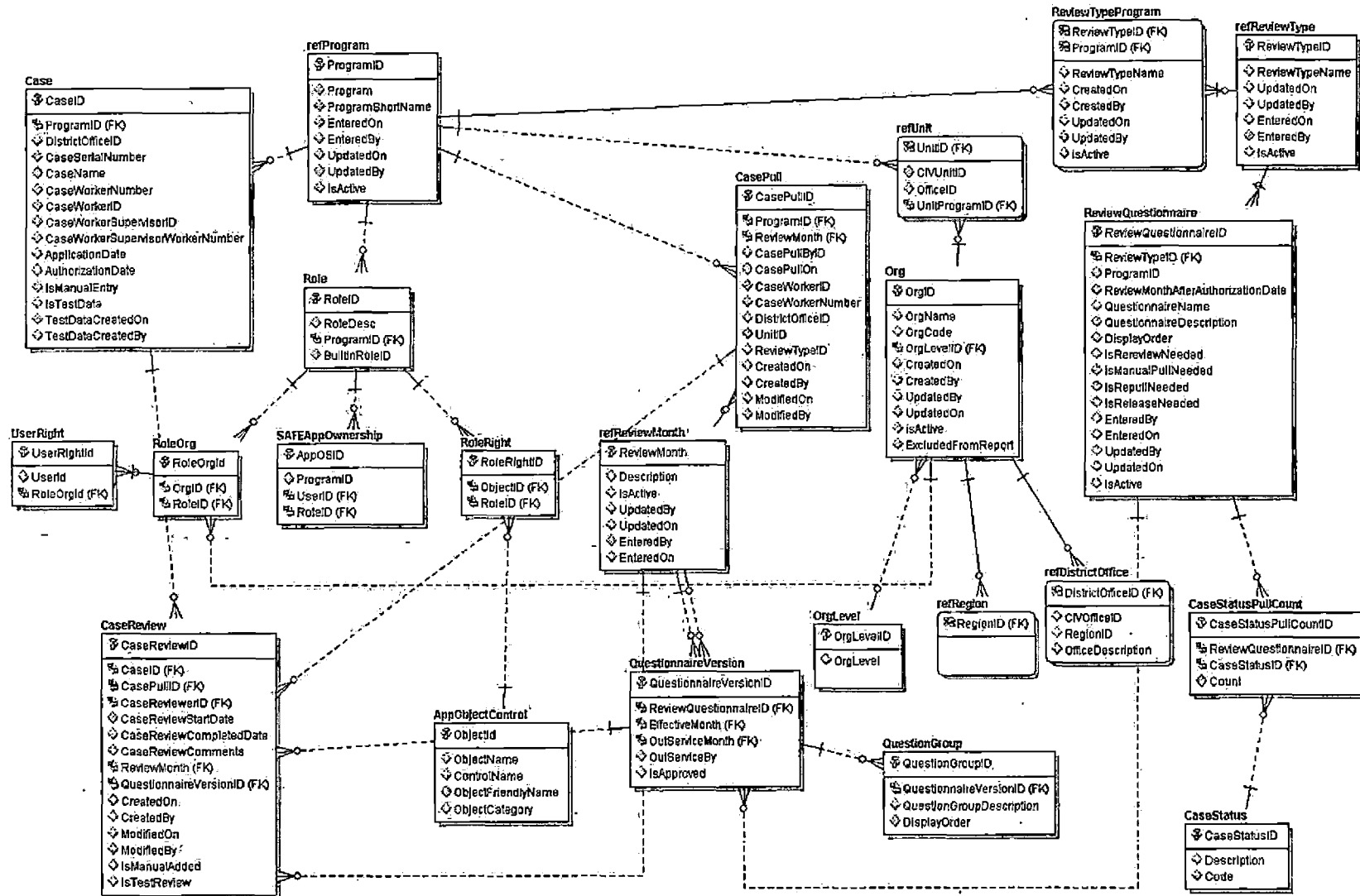
CasePull



CaseReviewQuestion







APPENDIX B  
WEBPAGES SPECIFICATIONS

## WEBPAGES SPECIFICATIONS

Master page (MasterPage.Master)

### Page Description:

This page provides a banner and a navigation menu for all main pages except pop-ups.

Page Name: MasterPage.Master

### Page Layout:

The screenshot shows the Medi-Cal Case Review website interface. At the top, the title "Medi-Cal Case Review" is displayed in large white text on a dark background. Below the title, it says "STARS Integrated Database Medi-Cal Case Review System Website". In the top right corner, it indicates "Logged in: Minh Le Hoang [Logout]". A navigation menu is located below the title, with links for "My Desktop", "Case Selectors", "Rebuttals", "Correction Due", "Reports", and "Administration". The main content area is divided into two sections. On the left, there is a "Search for a case" section with a "Case Number" input field, a "Search" button, and a "History Search" link. Below this is a "Review Month" section with a navigation bar showing "<< Prev. April 2008 Next >>". On the right side of the main content area, there is a large bracketed area labeled "CONTENT PLACE HOLDER". At the bottom of the page, a footer contains the text "© 2008 STARS Integrated Database | Designed and Maintained by: HS-ITSD".

Initial load process: Everyone has access to the master page.

Page Controls:

Object	Type	Source	Validation	Remarks
Main Menu	Menu			Options available are dependent on the security profile.
Logged-in User	Label			Person logged-in user's full name.
Logout	Link			Redirect to the common Logout page and abandon all of the session variable
Case #	Text Box		Format: Numbers 7 digits?	Works as an input for a case lookup.
Search	Button			OnClick: the system will redirect to the Search page.
Review month	Label			This label shows the review month. The default value of this should be the current month (based on the web server clock). This review month can be changed by clicking on "<< Prev" and "Next >>" link.
<< Prev	Link			OnClick: the review month label will be changed to the previous month.
Next >>	Link		The review month cannot be 2 months greater than the current month.	OnClick: the review month label will be changed to the next month.

Main Menu Definition:

Object	Type	Destination Page	Remarks
My Desktop	Menu Option	Default.aspx	

Case Selector	Menu Option	CaseSelector.aspx	
Rebuttals	Menu Option	CaseRebuttals.aspx	
Corrections Due	Menu Option	CorrectionsDue.aspx	
Reports	Menu Option	Reports	
Administration	Menu Option	Admin/Default.aspx	

### My Desktop (Default.aspx)

Page Description: This is the Main Page of the application. This page shows two sections: My Reviews Summary and My Case Worker.

- The first section allows the logged-in user to see the reviews summary for the selected Review Month. The summary displays the count of the reviewed cases with different review statuses. Also from here the user can click on the links to view the detailed list.
- The second section allows the logged-in supervisor view the list of their case workers (supervises) with the number of reviewed cases and number of the rebuttal requests. In the left panel control, there is a web user control that lists the most 10 pending recent reviews.

Page Name: Mydefault.aspx

Page Layout:

**Medi-Cal Case Review**  
 STARS Integrated Database Medi-Cal Case Review System Website

Logged in: Minh Le Hoang | Logout

My Desktop Case Selectors Rebuttals Correction Due Reports Administration

Search for a case  My Reviews Summary

June 2008

History Search In progress (7) Completed (5) W/ Errors (2) Rebuttals (1)

Review Month  My Caseworkers

<< Prev. June 2008 Next >>

Worker Name	Caseworker ID	# of Reviewed Case(s)	Rebuttal Submitted Requests
	36LS01	14 Cases	3
	36LS01	11 Cases	1
	36LS01	12 Cases	2
	36LS01	10 Cases	2

Recent Reviews

M-5623

M-1935

M-1254

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Initial load process: All users have access to this page.

Page Controls:

Group A: My Reviews Summary

Showing the log in user's case status based on selected month. The case statuses are:

- In Progress
- Completed
- With Error
- Rebuttals

Group B: My Case Workers

If a log in user is a supervisor then this section will be available. There will be 4 columns in this grid view:



- Worker Name
- Case Worker ID
- Number of Reviewed Case(s)
- Rebuttal Submitted Requests

Label	Type	Source	Validation	Remarks
My Reviewing Summary	Web User Control	Case - Casereview - CasereviewRebuttal		This control has 2 public properties: logged-in User ID and Review Month.
Month - Year	Label			Display the current month as default. It can be changed if needed.
In progress (#)	Link			The link provides the count of the cases that are reviewed by the logged-in user and does not have the [CaseReviewStartDate].
Completed (#)	Link			The link provides the count of the cases that are reviewed by the logged-in user and does have the [CaseReviewCompletedDate].
With Error (#)	Link			The link provides the count of the cases that are reviewed by the logged-in user and does have the [CorrectionDueDate].
Rebuttal (#)	Link			The link provides the count of the rebuttal request which the case was reviewed by the logged-in user.
My Case workers	Web User Control	Person - Workernumber - Case - Casereview - CasereviewRebuttal		This control has 2 public properties: logged-in User ID and Review Month. The list of the case workers is displayed in a Gridview control with the standard features.
Worker Name	Label			
Case Worker ID	Label			
# of Reviewed Case(s)	Link			The link provides the count of the reviewed cases (Completed review only) of the indicated Case worker within

				the selected Review Month.
Rebuttal Submitted Requests	Link			The link provides the count of the rebuttal request of the indicated Case worker within the selected Review Month.
Recent Reviews	Web User Control			This control has 2 public properties: logged-in User ID and Review Month. The list of the recent reviews should be implemented on a data list control. The number of the displayed recent reviews are located in the configuration table [confApplicationSetting].[NumberOfRecentReview].
List of Case Number	Data List Control			The list of case numbers are the list of links that allow users to link to the Review page.

### Search Page (search.aspx)

Page Description: This Page will allow the user to Search for cases. The system will provide a list of cases matching the criteria. From here the user can open a case review when they click in a specific review.

Page Name: Search.aspx

Page Layout:

**Medi-Cal Case Review**  
 STARS Integrated Database Medi-Cal Case Review System Website

Logged in: Minh Le Hoang | Logout

My Desktop Case Selectors Rebuttals Correction Due Reports Administration

**Search for a case**

Review Month: 05/2008

Case Number: \_\_\_\_\_

File Number: \_\_\_\_\_

Review Type: \_\_\_\_\_

District: \_\_\_\_\_

Reviewer: \_\_\_\_\_

Review Status: \_\_\_\_\_

With Error?  Yes  No

In Rebuttal Process?  Yes  No

Search Results

Case Name	Case Number	File Number	Review Type	Review Status
	MC-156	1536LS01	Tier I	In Progress
	MC-136	1536LS01	Tier I	In Progress
	MC-336	1536LS01	Tier I Re-review	In Progress
	MC-236	1536LS01	Tier I Re-review	In Progress
	MC-336	1536LS01	Intake	In Progress
	MC-236	1536LS01	Intake	In Progress
	MC-336	1536LS01	Intake	In Progress

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Page Controls:

Section 1:

This is the section that is located at the left of the screen to collect the criteria for searching operation.

Label	Type - Remarks																								
Search for a case	Label																								
Review Month	List box - Show past months of report only.																								
Case Number	Text box - Validation required: Prefix "MC" is optional. Numerical only after MC																								
File Number	Text box - Validation required: (ex: worker 36AS16230C) <table border="1" data-bbox="489 638 1336 928"> <thead> <tr> <th>Order</th> <th>Name</th> <th>Sample</th> <th>Validation</th> </tr> </thead> <tbody> <tr> <td>First 2</td> <td>SB County</td> <td>36</td> <td>yes</td> </tr> <tr> <td>Next 2</td> <td>Worker type</td> <td>LS</td> <td>yes</td> </tr> <tr> <td>Next 2</td> <td>District</td> <td>16</td> <td>Number only. Based on active District table in the maintenance table.</td> </tr> <tr> <td>Next 2</td> <td>Unit</td> <td>23</td> <td>Number only</td> </tr> <tr> <td>Next 2</td> <td>Position</td> <td>0C</td> <td>Alpha Numerical only</td> </tr> </tbody> </table>	Order	Name	Sample	Validation	First 2	SB County	36	yes	Next 2	Worker type	LS	yes	Next 2	District	16	Number only. Based on active District table in the maintenance table.	Next 2	Unit	23	Number only	Next 2	Position	0C	Alpha Numerical only
Order	Name	Sample	Validation																						
First 2	SB County	36	yes																						
Next 2	Worker type	LS	yes																						
Next 2	District	16	Number only. Based on active District table in the maintenance table.																						
Next 2	Unit	23	Number only																						
Next 2	Position	0C	Alpha Numerical only																						
Review Type	List box. Ex: Tier I Review; Tier I Re-review; Intake Review																								
District	List box - This shows the list of the districts.																								
Reviewer	List box - This shows the list of the reviewer in the above selected district.																								
Review Status	List box - Ex: In progress; Completed																								
With Error No?	Optional Radio button. Default to "No"																								
In Rebuttal Process No?	Optional Radio button																								
Search	It will show the results on section 2.																								

**Section 2:**

This section is the search results and is located at the right of the screen.

Label	Type	Remarks
Search Results	Web User Control	The search criteria in section 1 should be the list of the public properties of this control. The control uses Gridview control to display the search results.
Case Name		
Case Number	Link	OnClick: link to the Review Page.
File Number		
Review Type		
Review Status		

### Case Selector Page (Caseselector.aspx)

Page Description: From this page, users have the ability to select a Case Selector for a desired reviews type.

Page Name: CaseSelector.aspx

Page Layout:

**Medi-Cal Case Review**  
 STARS Integrated Database, Medi-Cal Case Review System Website

Logged in: Minh Le Hoang | Logout

My Desktop Case Selectors Rebuttals Correction Due Reports Administration

---

**Search for a case**

Case Number

History Search

Review Month

<< Prev. April 2008 Next >>

**Continuing Case Selector**

- **Tier I review**  
Tier I review's case selector pulls 15 continuing cases of a selected case worker.
- **Tier I re-review**  
This case selector pulls Tier I Review's questionnaire to perform a re-review.

**Intake Case Selector**

- **Intake Review**  
The purpose of this cursory review is not to lead you to believe you must answer all the review questions from memory; rather, it is to give you a "feel" for the case.  
The expectation is that you will refer back to the case record as many times as needed when answering the questions.

Page Controls:

Label	Type	Source	Remarks
Type of Case Selector	Label	refReviewType	Each review type has its own Case Selector (ex. Continuing Case Selector, Intake Case Selector).
Review (Questionnaire) Name	Link	refReviewType - ReviewQuestionnaire	<p>Under each type of Case Selector, there are a list of the reviews and its descriptions (stored in the database - [ReviewQuestionnaire].[ReviewMonthAfterAuthorizationDate])</p> <p>OnClick: if user clicks on a Continuing Review, the system redirects to the Continuing Case Selector (ContinuingCaseSelector.aspx) and passes the appropriate parameters as follows:  <i>ContinuingCaseSelector.aspx?ReviewID={reviewQuestionnaireID}</i></p> <p>If user clicks on a Continuing Re-Review, the system redirects to the Continuing Case Selector (ContinuingCaseSelector.aspx) and passes the appropriate parameters as follows:</p>

			<p>ContinuingCaseSelector.aspx?ReviewID={reviewQuestionnaireID&amp;Rereview=1}</p> <p>If user clicks on an Intake Review, the system redirects to the Intake Case Selector (IntakeCaseSelector) and passes the appropriate parameters as follows: IntakeCaseSelector.aspx?ReviewID={reviewQuestionnaireID}</p>
--	--	--	--

### Continuing Case Selector Page (Continuingcaseselector.aspx)

Page Description: From this page, users have the ability to pull out a list of the monthly continuing cases for a selected case worker.

Page Name: ContinuingCaseSelector.aspx

Page Layout:

Initial Load (before pulling cases)

Search for a case

Tier I Review

Case Number

Select the review month you want to review from the list provided in the drop down box. Next select the district you are going to review from the list provided in the drop down box. Then select the worker number of the person you want to review from the list provided in the drop down box. Click "Get Cases".

History Search

Review Month

District

<< Prev. April 2008 Next >>

Case Worker   Just Worker I Supervise

Case List

Case Name	Case Number	Review Status	Re-pull	Release
	MC-156	In Progress		
	MC-136	In Progress		
	MC-336	In Progress		
	MC-236	Not Started		
	MC-336	Not Started		
	MC-236	Not Started		
	MC-336	Not Started		
	MC-236	Not Started		
	MC-336	Not Started		
	MC-236	Not Started		
	MC-336	Not Started		
	MC-236	Not Started		
	MC-336	Completed		
	MC-236	Completed		

After click on the [Get Cases] button



provided in the drop down box. Click "Get Cases".

District:

**ADD NEW CASE TO REVIEW LIST**

Case Number

Case Name

Application Date

Authorization Date

Caseworker Number

Caseworker Name

Not Started



Not Started

Add new case to review list Modal Popup

Page Controls:

Label	Type	Source	Validation	Remarks
Tier I Review	Label			The text of the label dynamically displays the selected review's name (URL parameter).
District	DD List box	[District]	Required	Only active Districts are displaying.
Case Worker	DD List box		Required	This dropdown list box is populated based on the district selection.
Just Worker I supervise	Check box			This checkbox is only available if the logged-in user is a supervisor. Default to "unchecked".

Get Cases	Button			<p>OnClick: on the very first time of every month when the reviewer clicks on this button to pull out the number of cases of the selected case worker to perform the reviews, the system shall randomly pull out a number of cases of the selected case worker from the C-IV database and store those into the MCRS database. On the next time of the same month when the reviewer clicks on this button, the system shall re-call out the same list of cases stored in the MCRS database.</p> <ul style="list-style-type: none"> <li>- Based on the case workers status, the system will pull out a number of cases accordingly (ex "Regular" case worker status will be reviewed 15 cases; "Performance issues" case worker status will be reviewed 20 cases.).</li> <li>- The list of cases will be displayed in a Gridview showed in the Screenshot 5.5 2.</li> </ul>
Case List	Grid view			<ul style="list-style-type: none"> <li>- This case list will be displayed after selecting Get Cases button.</li> <li>- This Case List Gridview Control composes the following columns: <ul style="list-style-type: none"> <li>• Case Name</li> <li>• Case Number</li> <li>• Review Status</li> <li>• Re-pull</li> <li>• Release</li> </ul> </li> </ul>
Case Name	Grid view Column			User will have the ability to sort by Case Name.
Case number	Grid view Column			<ul style="list-style-type: none"> <li>- User will have the ability to sort by Case Number.</li> <li>- User can click on the case number to open out the Review Page.</li> </ul> <p>(CaseReview.aspx?CaseReviewID={CaseReviewID}&amp;Re</p>

				<i>review=</i> <i>{QueryString(Rereview)}</i>
Review Status	Grid view Column			<ul style="list-style-type: none"> <li>- User should also have the ability to sort by Review Status.</li> <li>- There are 3 types of Review Status:  Not started - This status is applied for a review that does not have a Start Date ([CaseReview].[CaseReviewStartDate] is null).  In progress - This status is applied for a review that does have a Start Date ([CaseReview].[CaseReviewStartDate] is not null) and does not have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is null).  Completed - This status is applied for a review that does have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is not null).</li> </ul>
Re-pull 	Grid view Column - Image Button			<ul style="list-style-type: none"> <li>- This Gridview column is only available if the logged-in user has "District Manager" profile.</li> <li>- This "re-pull" option is only available for the review that is in the "Not Started" status.</li> <li>- OnClick: the system will randomly pull a different case and replace the existing one.</li> </ul>
Remove 	Grid view Column - Image Button			<ul style="list-style-type: none"> <li>- This Gridview column is only available if the logged-in user has "District Manager" profile.</li> <li>- This "remove" option is only available for the review that is in the "Not Started" status.</li> <li>- OnClick: the system will remove the selected item out of the list.</li> </ul>

Add new case to review list	Button				- Display together with the below Case List Gridview after clicking the Get Cases button. - OnClick: displays a popup modal as the Screenshot 5.5_3.
Add new case to review list	Modal Popup - Web User Control				This modal popup is implemented with Microsoft Ajax ModalPopup Extender.
Case Name	Textbox		Required		
Case Number	Textbox		Required		This field shall have the following validation: - Prefix "MC" is optional. - 7 Numerical character only after MC
Application Date	Textbox		-Required -Date field		This textbox will come with a calendar picker extender.
Authorization Date	Textbox		-Required -Date field		This textbox will come with a calendar picker extender.
Case worker Number	Textbox		-Required -- File number format		Validation required: (ex: worker 36AS16230C)
	Order	Name	Sample	Validation	
	First 2	SB County	36	yes	
	Next 2	Worker type	LS	yes	
	Next 2	District	16	Number only. Based on active District table in the maintenance table.	
	Next 2	Unit	23	Number only	
	Next 2	Position	0C	Alpha Numerical only	
Case worker Name	Textbox		required		This field should be populated automatically based on the Case worker number (file number).

## Intake Case Selector Page (Intakecaseselector.aspx)

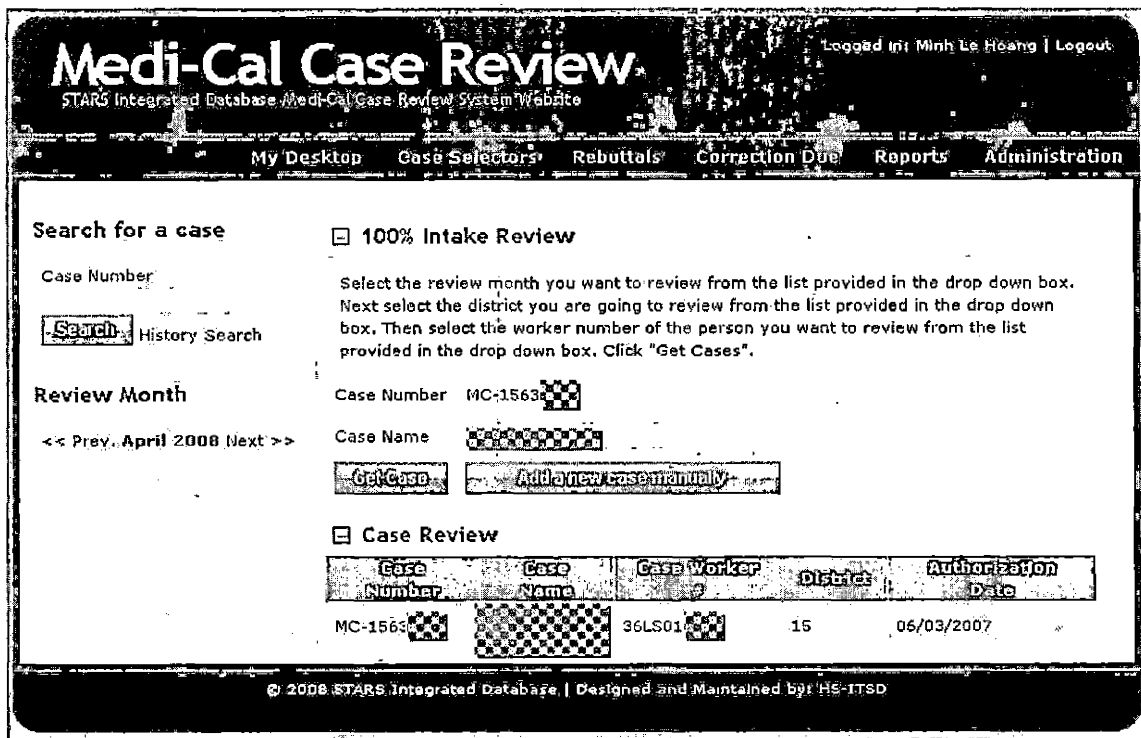
Page Description: From this page, users have the ability to pull out an intake case to perform a case review.

Page Name: IntakeCaseSelector.aspx

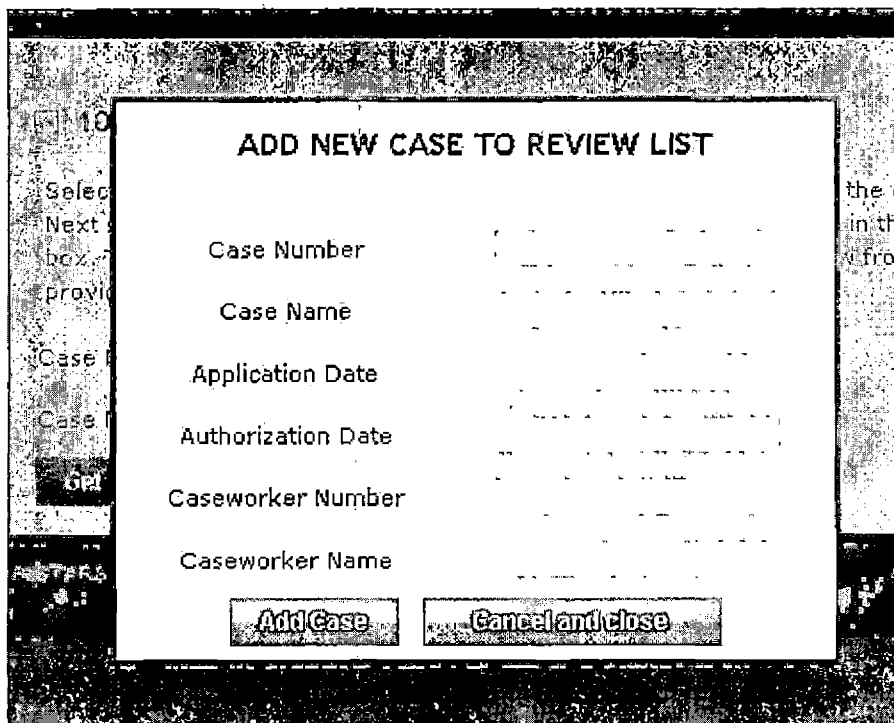
Page Layout:

The screenshot shows the 'Medi-Cal Case Review' web application. At the top, it says 'STARS Integrated Database Medi-Cal Case Review System Website' and 'Logged in: Michelle Hanna | Logout'. A navigation menu includes 'My Desktop', 'Case Selectors', 'Rebuttals', 'Correction Due', 'Reports', and 'Administration'. The main content area is titled 'Search for a case' and features a '100% Intake Review' checkbox. There are input fields for 'Case Number' and 'Case Name', a 'Search' button, and a 'History Search' link. A 'Review Month' section shows '<< Prev. April 2008 Next >>'. Below the search fields are 'Get Case' and 'Add a new case manually' buttons. The footer contains the copyright notice: '© 2008 STARS Integrated Database. Designed and Maintained by DHS-ITSD'.

Initial Load



After click on the [Get Case] button or [Add a new case manually] button



## Add new case to review list Modal Popup

### Page Controls:

Label	Type	Source	Validation	Remarks
Intake Review	Label			The text of the label dynamically displays the selected review's name (URL parameter).
Case Number	Textbox		Required	This field shall have the following validation: - Prefix "MC" is optional. - 7 Numerical character only after MC
Case Name	Textbox		Required	
Get Case	Button			OnClick: lookup and display the case based on the above criteria.
Add a new case manually	Button			- OnClick: displays a popup modal as the above Screenshot
Add new case to review list	Modal Popup - Web User Control			This modal popup is implemented with Microsoft Ajax ModalPopup Extender.
Case Name	Textbox		Required	
Case Number	Textbox		Required	This field shall have the following validation: - Prefix "MC" is optional. - 7 Numerical character only after MC
Application Date	Textbox		-Required -Date field	This textbox will come with a calendar picker extender.
Authorization Date	Textbox		-Required -Date field	This textbox will come with a calendar picker extender.
Case worker Number	Textbox		-Required -- File number format	Validation required: (ex: worker 36AS16230C)

	Order	Name	Sample	Validation
	First 2	SB County	36	yes
	Next 2	Worker type	LS	yes
	Next 2	District	16	Number only. Based on active District table in the maintenance table.
	Next 2	Unit	23	Number only
	Next 2	Position	0C	Alpha Numerical only
Case worker Name	Textbox		required	This field should be populated automatically based on the Case worker number (file number).
Case Review	Grid view			- This control displays the result of the searching criteria. - This Case Review Gridview Control composes the following columns: <ul style="list-style-type: none"> <li>• Case Name</li> <li>• Case Number</li> <li>• Review Status</li> <li>• Re-pull</li> <li>• Release</li> </ul>
Case number	Grid view Column			- User will have the ability to sort by Case Number. - User can click on the case number to open the Review Page ( <i>CaseReview.aspx?CaseReviewID={CaseReviewID}</i> )
Case Name	Grid view Column			User will have the ability to sort by Case Name.
Case Worker #	Grid view Column			User will have the ability to sort by Case Worker #.
District	Grid view Column			User will have the ability to sort by District.
Authorization Date	Grid view Column			User will have the ability to sort by Authorization Date.



## Case Review Page (Casereview.aspx)

Page Description: This page displays the initial question to allow users to start a review.

Page Name: CaseReview.aspx

Page Layout:

The screenshot shows the Medi-Cal Case Review web application. At the top, there is a header with the title "Medi-Cal Case Review" and navigation links for "My Desktop", "Case Selections", "Rebuttal", "Correction Dual", "Reports", and "Administration". Below the header, there is a "Case Information" panel on the left and a main review area on the right.

**Case Information**

Application Date: 05/02/2006  
Review Date: 05/19/2006 8:42:44 AM  
Case Name: [REDACTED]  
Case Number: 1115735  
Worker Name: [REDACTED]  
File Number: 36LS01 [REDACTED]  
Reviewer Name: [REDACTED]  
Supervisor Name: [REDACTED]  
Review Type: MC-Tier I

**Supervisory Tool for Accurate Reviews**

Is there a current Statement of Facts on file or imaged in C-IV?  Yes  No  N/A

The reviewer will respond to this question as follows:

If the Statement of Facts is...	And...	Then the reviewer will select...	And...
Required	is on file or imaged in C-IV	"Yes"	Continue with the review
Required	is not on file or imaged in C-IV	"No"	Terminate the review
Not required	is or is not on file or imaged in C-IV	"N/A" for not applicable	Continue with the review

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Page Controls:

This page contains two sections:

Section 1: The first section is the General Case Information panel located on the left of the screen.

Label	Type - Descriptions
Case Information	Web User Control - This user control displays the information of the selected case (URL parameter CaseReviewID).
Application Date	Label - Data is populated based on the URL parameter CaseReviewID.
Review Date	Label - This label displays the server date & time.
Case Name	Label - Data is populated based on the URL parameter CaseReviewID.
Case number	Label - Data is populated based on the URL parameter CaseReviewID.
Worker Name	Label - Data is populated based on the URL parameter CaseReviewID.
File Number	Label - Data is populated based on the URL parameter CaseReviewID.
Reviewer Name	Label - This label displays the logged-in username.
Supervisor Name	Label - Supervisor name of the logged-in user.
Review Type	Label - Data is populated based on the URL parameter CaseReviewID.

Section 2: This section displays the initial review question located on the right of the screen

Label	Type	Source	Validation	Remarks
Supervisory Tool for Accurate Reviews	Label			
The initial question				Is there a current Statement of Facts on file or imaged in C-IV?

Begin Review	Button			OnClick: if user answered "yes" in the above initial question, the system will save the reviewer information (logged-in user) and the Review Start Date (system date & time) into the database and will redirect to the Case Review Manager page. <i>(CaseReviewManager.aspx?CaseReviewID={CaseReviewID})</i>
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### Case Review Manager Page (Casereviewmanager.aspx)

Page Description: This page will render the Review Questionnaire. User can start to response the questions in the questionnaire to review the selected case.

Page Name: CaseReviewManager.aspx

Page Layout:

# Medi-Cal Case Review

STARS Integrated Case Management System Website

My Desktop Case Selectors Rebuttal Correction Due Reports Administration

## Case Information

**Application Date:**  
05/02/2006  
**Review Date:**  
05/19/2006 8:42:44 AM  
**Case Name:**  
[REDACTED]  
**Case Number:**  
111  
**Worker Name:**  
[REDACTED]  
**File Number:**  
36LS01  
**Reviewer Name:**  
[REDACTED]  
**Supervisor Name:**  
[REDACTED]  
**Review Type:**  
MC-Tier I

## Review Information

**Review Status:**  
In Progress  
**Review Statistics:**  
View Score Card  
H: 3  
P: 2  
**Review Comments:**  
[REDACTED]

## Supervisory Tool for Accurate Reviews

ID	Question	Y	N	P	NA
----	----------	---	---	---	----

### CASE SUMMARY

1 (?)	Is the RE date correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 (?)	Was the correct beginning date of aid determined?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 (?)	Is the Medi-Cal Program Type correct for each program person?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 (?)	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### CASE CONTACT

5 (?)	Is the correct address entered for each MFBU member?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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### ROOT QUESTIONS - APPLICATION

6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Is there an original completed application in case record (SAWS1, CA1, etc)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Is there a current MC219 or Journal entry addressing it in case record?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Were appropriate procedures followed for the DHS7068?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Is there a correctly reconciled IEVS 410 for all required person(s)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Were correct procedures followed for any retroactive Medi-Cal request?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	If Minor Consent, is there a current and correctly completed MC4026 in case record?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	If Minor Consent is for Mental Health, is there a correct and current Mental Health statement in case record?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### INDIVIDUAL DEMOGRAPHICS

### HOUSEHOLD STATUS

### RELATIONSHIPS

### CITIZENSHIP

### PREGNANCY

### RESIDENCY

### OTHER PROGRAM ASSISTANCE

### ELIGIBILITY NON-COMPLIANCE

10/17/06

Page Controls:

This page contains two sections.

Section 1: The first section is the General Case Information panel located on the left of the screen.

Label	Type - Descriptions
Case Information	Web User Control - This user control displays the information of the selected case (URL parameter CaseReviewID).
Application Date	Label - Data is populated based on the URL parameter CaseReviewID.
Review Date	Label - This label displays the server date & time.
Case Name	Label - Data is populated based on the URL parameter CaseReviewID.
Case number	Label - Data is populated based on the URL parameter CaseReviewID.
Worker Name	Label - Data is populated based on the URL parameter CaseReviewID.
File Number	Label - Data is populated based on the URL parameter CaseReviewID.
Reviewer Name	Label - This label displays the logged-in username.
Supervisor Name	Label - Supervisor name of the logged-in user.
Review Type	Label - Data is populated based on the URL parameter CaseReviewID.
Review Status	- There are 3 types of Review Status: Not started - This status is applied for a review that does not have a Start Date ([CaseReview].[ CaseReviewStartDate] is null). In progress - This status is applied for a review that does have a Start Date ([CaseReview].[ CaseReviewStartDate] is not null) and does not have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is null).

	Completed - This status is applied for a review that does have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is not null).
View Score Card	OnClick: it will link to ScoreCard.aspx.
H: [#]	This label provides the count number of "H" answer.
P: [#]	This label provides the count number of "P" answer.
Review Comments	Text box (maximum 500 characters). Required field
Save	Button - OnClick: save the review comments into database.

Section 2: This section displays the initial review question located on the right of the screen.

Label	Type	Source	Remarks
Supervisory Tool for Accurate Reviews	User Control		Based on the CaseReviewID URL parameter, the questionnaire, all of the client scripts and logics will be rendered accordingly.
Y	Table Header		This is the standard format of MC review questionnaire.
H	Table Header		This is the standard format of MC review questionnaire.
P	Table Header		This is the standard format of MC review questionnaire.
NA	Table Header		This is the standard format of MC review questionnaire.
Group of Question	Label	[QuestionGroup]. [QuestionGroupDescription]	Example: Case Summary

Collapse / Expand Questions group ☐	Image Button		This image button is the Expand and Collapse Control of the "CollapsiblePanelExtender".
Order #	Label		This label displays the order number of the question in a questionnaire.
(?)	Link		This link will open the Toolbox page (toolbox.aspx?QuestionID={QuestionID}) in a popup window.
Question	Label	[Question].[Question]	
Answer		[Answer]	The answer can be displayed on different type of controls. In the first initial deployment, the system will support the following controls: Radio Button OnCheckChanged: save the answer to the database ([CaseReviewAnswerItem]) Checkbox OnCheckChanged: save the answer to the database ([CaseReviewAnswerItem]) Dropdown list box OnSelectChanged: save the answer to the database ([CaseReviewAnswerItem]) Free form text OnTextChanged: save the answer to the database ([CaseReviewAnswerItem])
Submit	Button		OnClick: validate all of the questions & answers and record the Review Completed Date & Time.

### Case Re-Review Manager Page (Casereviewmanager.aspx)

Page Description: This page will render the Re-Review Questionnaire. User can start to response the questions in the questionnaire to perform the re-review the selected case.

Initial Load process: This initial load is a different mode of the Case Review Manager Pager when the ReReview URL parameter is "1".

<p>My Desktop Case Selector Rebuttals Correction Due Reports Administration</p>																																																																																																																																																																		
<p><b>Case Information</b></p> <p>Application Date: 05/02/2006                  Review Date: 05/19/2008 8:42:44 AM                  Case Name: [REDACTED]                  Case Number: 111 [REDACTED]                  Worker Name: [REDACTED]                  File Number: 36LS01 [REDACTED]                  Reviewer Name: [REDACTED]                  Supervisor Name: [REDACTED]                  Review Type: MC-Tier I - Re-review</p>																																																																																																																																																																		
<p><b>Supervisory Tool for Accurate Reviews</b></p> <table border="1"> <thead> <tr> <th>ID</th> <th>Question</th> <th>Y</th> <th>N</th> <th>NA</th> <th>NC</th> <th>MT</th> </tr> </thead> <tbody> <tr> <td colspan="7"><b>CASE SUMMARY</b></td> </tr> <tr> <td>1 (?)</td> <td>Is the RE date correct?</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>2 (?)</td> <td>Was the correct beginning date of aid determined?</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>3 (?)</td> <td>Is the Medi-Cal Program Type correct for each program person? 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Page Controls:

This page contains two sections.


Section 1: The first section is the General Case Information panel located on the left of the screen.

Label	Type - Descriptions
Case Information	Web User Control - This user control displays the information of the selected case (URL parameter CaseReviewID).
Application Date	Label - Data is populated based on the URL parameter CaseReviewID.
Review Date	Label - This label displays the server date & time.
Case Name	Label - Data is populated based on the URL parameter CaseReviewID.
Case number	Label - Data is populated based on the URL parameter CaseReviewID.
Worker Name	Label - Data is populated based on the URL parameter CaseReviewID.
File Number	Label - Data is populated based on the URL parameter CaseReviewID.
Reviewer Name	Label - This label displays the logged-in username.
Supervisor Name	Label - Supervisor name of the logged-in user.
Review Type	Label - Data is populated based on the URL parameter CaseReviewID.
Review Status	- There are 3 types of Review Status: Not started - This status is applied for a review that does not have a Start Date ([CaseReview].[ CaseReviewStartDate] is null). In progress - This status is applied for a review that does have a Start Date ([CaseReview].[ CaseReviewStartDate] is not null) and does not have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is null).

	Completed - This status is applied for a review that does have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is not null).
View Score Card	OnClick: it will link to ScoreCard.aspx.
H: [#]	This label provides the count number of "H" answer.
P: [#]	This label provides the count number of "P" answer.
Review Comments	Text box - This will displays the review comments. This textbox will be in disable mode.
Re-Review Comments	Text box (maximum 500 characters). Required field
Save	Button - OnClick: Save the re-review comments into database.

Section 2: This section displays the initial review question located on the right of the screen.

Label	Type	Source	Remarks
Supervisory Tool for Accurate Reviews	User Control		Based on the CaseReviewID URL parameter, the questionnaire, all of the client scripts and logics will be rendered accordingly.
Y	Table Header		This is the standard format of MC review questionnaire.
H	Table Header		This is the standard format of MC review questionnaire.
P	Table Header		This is the standard format of MC review questionnaire.
NA	Table Header		This is the standard format of MC review questionnaire.

Re-review	Table Header		This is the standard format of MC re-review questionnaire.
Group of Question	Label	[QuestionGroup] . [QuestionGroup Description]	Example: Case Summary
Collapse / Expand Questions group 	Image Button		This image button is the Expand and Collapse Control of the "CollapsiblePanelExtender".
Order #	Label		This label displays the order number of the question in a questionnaire.
(?)	Link		This link will open the Toolbox page (toolbox.aspx?QuestionID={QuestionID}) in a popup window.
Question	Label	[Question].[Question]	
Answer		[Answer]	The answer can be displayed on different type of controls. All of these controls will be in disable mode.
Re-review	Checkbox		OnCheckChanged: the system will save the re-review discrepancy indicator into the database [CaseReviewAnswerItem]. isRereviewDiscrepancy.
Submit	Button		OnClick: validate all of the questions & answers and record the re-review Completed Date & Time.

### Score Card (Scorecard.aspx)

Page Description: This page will render the score card based on the list of questions and answers of the review.

Initial Load process: The page will read the URL parameter CaseReviewID to render the score card.

Page Name: ScoreCard.aspx

Page Layout:

Case Name: [REDACTED] Case Number: 1115 [REDACTED]  
Worker Name: [REDACTED] Worker Number: 36LS01B [REDACTED]  
Supervisor: [REDACTED] Audit Month: 06/2008

**Medi-Cal Case Audit Score Card**

1:	13:	25:	37:	49:	61:
2:	14:	26:	38:	50:	62:
3:	15:	27:	39:	51:	63:
4:	16:	28:	40:	52:	64:
5:	17:	29:	41:	53:	65:
6:	18:	30:	42:	54:	66:
7:	19:	31:	43:	55:	67:
8:	20:	32:	44:	56:	68:
9:	21:	33:	45:	57:	69:
10:	22:	34:	46:	58:	
11:	23:	35:	47:	59:	
12:	24:	36:	48:	60:	

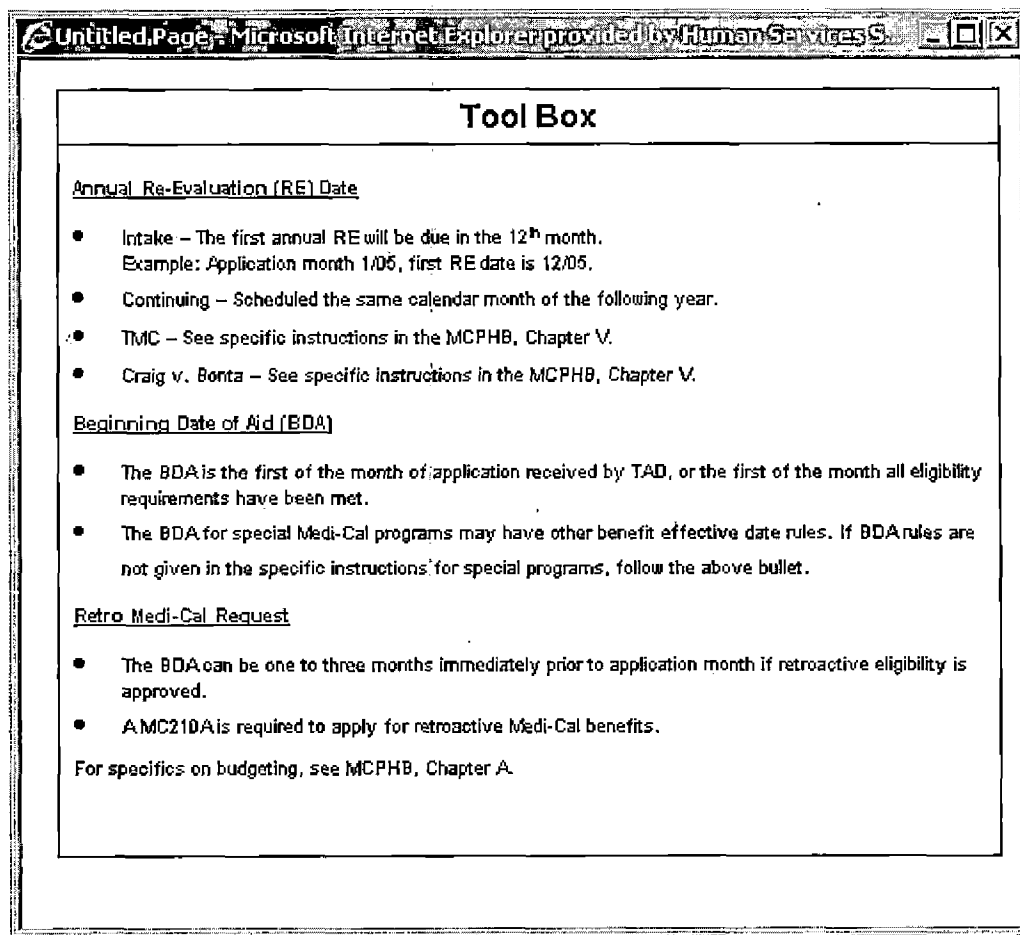
**Toolbox (Toolbox.AspX)**

Page Description: This page allows users view the online tool box of each question in the review questionnaire.

Initial Load process: The page will read the URL parameter QuestionID to display the toolbox accordingly.

Page Name: Toolbox.aspx

Page Layout:



### My Cases (Mycases.aspx)

Page Description: This is the Main Page of the case workers. This page shows two sections: My Cases and My Rebuttal Requests.

- The first section allows the case worker to see the list of his/her cases that had been reviewed in the selected Review Month.

- The second section allows the case worker to view the status of his/her rebuttal requests and its detailed information.

Page Name: MyCases.aspx

Page Layout:

**Medi-Cal Case Review**  
STARS Integrated Database / Medi-Cal Case Review System Website

Logged in: Minh Le Hoang | Logout

My Cases

Review Month: << Prev. May 2008 Next >>

My Cases

Case Name	Case number	Correction Due	Error (s)	Correction Status
	MC-136	NA	0	
	MC-156	NA	0	
	MC-136	05/12/2008	4	Complete
	MC-336	05/22/2008	1	Complete
	MC-336	05/20/2008	1	Incomplete

My Rebuttal Requests

Case Name	Case number	Review Date	Question ID	Rebuttal Status
	MC-156	05/02/2008	17	Closed
	MC-156	05/02/2008	14	Pending
	MC-156	05/02/2008	16	Pending

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Initial load process: All of the case workers have access to this page. The users with other profiles cannot see this page and will be redirect to the default.aspx page.

Page Controls:

Label	Type	Source	Remarks
My Cases	Web User Control	Case - Casereview - CasereviewRebuttal	This control has 2 public properties: logged-in User ID and Review Month. The list of cases is displayed in a Gridview control with the standard features.
Case name	Gridview Column		
Case number	Gridview Column		OnClick: link to the Rebuttal Request page (RebuttalRequest.aspx?CaseReviewID={CaseReviewID})
Correction Due	Gridview Column		
Error(s)	Gridview Column		This label provides the count of the errors in the displayed review.
Correction Status	Gridview Column		There are 2 types of corrections status: Complete - This status is applied for the case review that does have the Correction Completed Date ([CorrectionCompletedDate] is not null). Incomplete - This status is applied for the case review that does not have the Correction Completed Date ([CorrectionCompletedDate] is null).
My Rebuttal Requests	Web User Control	Person - Workernumber - Case - Casereview - CasereviewRebuttal	This control has 2 public properties: logged-in User ID and Review Month. The list of the case workers is displayed in a Gridview control with the standard features.
Case name	Gridview Column		
Case Number	Gridview Column		
Review Date	Gridview Column		
Question ID	Gridview Column		This link is implemented the Microsoft Ajax HoverMenuExtender to display detailed information of the selected rebuttal request.

		<table border="1"> <thead> <tr> <th>ID</th> <th>Rebuttal Date</th> <th>Rebuttal Information</th> <th>Remove Item</th> <th>Responded by</th> </tr> </thead> <tbody> <tr> <td>17</td> <td>05/26/2008</td> <td>           Caseworker Declaration:            Correct verification of identity is in case record            Conclusion:            Item dismissed!         </td> <td> <input checked="" type="radio"/> Yes  <input type="radio"/> No         </td> <td>Minh Le (06/02/2008)</td> </tr> <tr> <td>12</td> <td></td> <td>Closed</td> <td></td> <td></td> </tr> </tbody> </table>	ID	Rebuttal Date	Rebuttal Information	Remove Item	Responded by	17	05/26/2008	Caseworker Declaration: Correct verification of identity is in case record Conclusion: Item dismissed!	<input checked="" type="radio"/> Yes <input type="radio"/> No	Minh Le (06/02/2008)	12		Closed		
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12		Closed															
Rebuttal Status	Gridview Column		<p>There are 2 types of rebuttal status:</p> <p>Pending - This status is applied for the rebuttal request that does not have any rebuttal conclusion ([RebuttalConclusion]).</p> <p>Closed - This status is applied for the rebuttal request that does have at least a rebuttal conclusion ([RebuttalConclusion]).</p>														

### RebuttalRequest Page (RebuttalRequest.aspx)

Page Description: This page allows the case worker submitting the rebuttal requests and rebuttal declaration. This page shows two sections: Case Information and Rebuttal Requests.

- The first section is the General Case Information panel located on the left of the screen.
- The second section allows the case worker to rebut any item in the review.

Page Name: RebuttalRequest.aspx

Page Layout:



# Medi-Cal Case Review

STARIS Integrated Database Medi-Cal Case Review System

Home | My Cases | Logout

My Cases

## Case Information

**Application Date:**  
05/02/2006

**Review Date:**  
05/19/2008 8:42:44 AM

**Case Name:**  
[REDACTED]

**Case Number:**  
111 [REDACTED]

**Worker Name:**  
[REDACTED]

**File Number:**  
06LS01 [REDACTED]

**Reviewer Name:**  
[REDACTED]

**Supervisor Name:**  
[REDACTED]

**Review Type:**  
MC-Tier I

## Rebuttal Requests

ID	Rebut	Rebuttal Date	Rebuttal Description
3	<input type="radio"/> Yes <input type="radio"/> No		
14	<input type="radio"/> Yes <input type="radio"/> No		
16	<input type="radio"/> Yes <input type="radio"/> No		
17	<input type="radio"/> Yes <input type="radio"/> No		

## Review Information

**Review Status:**  
In Progress

**Review Statistic:**  
View Score Card

H: 3  
P: 1

## Reviewed Questionnaire

(Click here to collapse or expand content)

## Review Comments:

unable to verify 285 A-1 from last RE also no 3/06 QR 7 on file or imaged unable to determine income correct, unable to determine if shelter, utility, and child care deduction correct as verif not imaged or on file. no journal entries.



# Medi-Cal Case Review

STARIS Integrated Database Medi-Cal Case Review System Website

Home | My Cases | Search | Logout

My Cases

## Case Information

**Application Date:**  
05/02/2006  
**Review Date:**  
05/19/2008 6:42:44 AM  
**Case Name:**  
[REDACTED]  
**Case Number:**  
111 [REDACTED]  
**Worker Name:**  
[REDACTED]  
**File Number:**  
36LS01E [REDACTED]  
**Reviewer Name:**  
[REDACTED]  
**Supervisor Name:**  
[REDACTED]  
**Review Type:**  
MC-Tier I

## Review Information

**Review Status:**  
In Progress  
**Review Statistic:**  
View Score Card  
 H: 3  
 P: 1

### Review Comments:

unable to verify 285 A-1 from last RE also no 3/08 QR 7 on file or imaged unable to determine income correct, unable to determine if shelter, utility, and child care deduction correct as verif not imaged or on file. no journal entries.

## Rebuttal Requests

ID	Rebut?	Rebuttal Date	Rebuttal Declaration
3	<input type="radio"/> Yes <input type="radio"/> No		
14	<input type="radio"/> Yes <input type="radio"/> No		
16	<input type="radio"/> Yes <input type="radio"/> No		
17	<input type="radio"/> Yes <input type="radio"/> No		

## Reviewed Questionnaire

(Click here to collapse or expand content)

ID	Question	Y	N	D	NT
<b>CASE SUMMARY</b>					
1 (?)	Is the RE date correct?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2 (?)	Was the correct beginning date of aid determined?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3 (?)	Is the Medi-Cal Program Type correct for each program person?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4 (?)	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>CASE CONTACT</b>					
5 (?)	Is the correct address entered for each MFBU member?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>ROOT QUESTIONS - APPLICATION</b>					
6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Is there an original completed application in case record (SAWS1, CA1, etc)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Is there a current MC219 or Journal entry addressing it in...				

Page Controls:

This page contains two sections.

Section 1: The first section is the General Case Information panel located on the left of the screen.

Label	Type	Descriptions
Case Information	Web User Control	- This user control displays the information of the selected case (URL parameter CaseReviewID)
Application Date	Label	- Data is populated based on the URL parameter CaseReviewID.
Review Date	Label	- This label displays the server date & time.
Case Name	Label	- Data is populated based on the URL parameter CaseReviewID.
Case number	Label	- Data is populated based on the URL parameter CaseReviewID.
Worker Name	Label	- Data is populated based on the URL parameter CaseReviewID.
File Number	Label	- Data is populated based on the URL parameter CaseReviewID.
Reviewer Name	Label	- This label displays the logged-in username.
Supervisor Name	Label	- Supervisor name of the logged-in user.
Review Type	Label	- Data is populated based on the URL parameter CaseReviewID.
Review Status		- There are 3 types of Review Status: Not started - This status is applied for a review that does not have a Start Date ([CaseReview].[ CaseReviewStartDate] is null). In progress - This status is applied for a review that does have a Start Date ([CaseReview].[ CaseReviewStartDate] is not null) and does not have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is null).

	Completed - This status is applied for a review that does have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is not null).
View Score Card	OnClick, it will link to ScoreCard.aspx.
H: [#]	This label provides the count number of "H" answer.
P: [#]	This label provides the count number of "P" answer.
Review Comments	Text box - This will displays the review comments. This textbox will be in disable mode.

Section 2: The second section is the rebuttal request form and the read-only detailed version of the reviewed questionnaire.

Label	Type - Descriptions
Rebuttal Request Form	Web User Control
ID	Label - This is the order number of the question in the review questionnaire.
Rebut	Yes/ No Checkbox list - The default selection of this checkbox list is "No" OnSelectChanged: if the selection is "yes", the application automatically populates the "Rebuttal Date" to the server's date.
Rebuttal Date	Label - The text of this label is populated based on the selection of the above checkbox list control.
Rebuttal Declaration	Multiple line textbox - This textbox becomes a required field if the user selected to rebut the selected item.
Submit	Button - OnClick: the application will validate the data in the above form and save it to the database ([CaseReviewRebuttal]).
Reset	Button - OnClick: refresh the Rebuttal Request Page

Reviewed Questionnaire	Link Button - This link is implemented with the Collapsible Control Extender to show or hide the detailed reviewer questionnaire. (Screenshot 5.12_2)
------------------------	---

### Rebuttal Page (Rebuttal.aspx)

Page Description: This page allows the users to lookup and view the rebuttal request and its detailed information.

Page Name: Rebuttal.aspx

Page Layout:

**Medi-Cal Case Review**  
 STARR Integrated Database (Medi-Cal Case Review System) Website

My Desktop Case Selector Rebuttals Correction Due Reports Administration

**Search for a case**  
 Case Number: \_\_\_\_\_  
 Case Name: \_\_\_\_\_  
 District: 01  
 Case Worker: \_\_\_\_\_  Just Worker I Supervise  
 Reviewer: \_\_\_\_\_  
 Review Month: << Prev. April 2008 Next >>  
 [Search] [History Search]

**Rebuttal for Review**  
 [Cases]

**Case List**

Case Name	Case Number	Case Worker	Review Date	Rebuttal Request Date	Rebuttal Status
	MC-156	36LS01B	05/15/2008	05/20/2008	Pending
	MC-136	36LS01B	05/17/2008	05/21/2008	Pending
	MC-336	36LS01B	05/19/2008	05/22/2008	Closed

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Page Controls:

Label	Type	Source	Validation	Remarks
Rebuttal for Review	Label			
Case Number	Text box			
Case Name	Text box			
District	List box	refDistrict Office		
Case Worker	List box	refPerson - Worker Number		This dropdown list box will populate the list of case workers accordingly based on the selection on the above District dropdown list box.
Just Workers I supervise	Check box			This checkbox is only available if the logged-in user is a supervisor. This checkbox will filter the list of the case workers and only show the case workers who is supervised by the logged-in user.
Reviewer	List box			
Get Cases	Button			OnClick: lookup for the rebuttal requests that are matched with the above searching criteria.
Case List	Web User Control			This control displays the result of the above search form.
Case Number	Grid view Column - Link			OnClick: link to the Rebuttal Process Page and pass the {rebuttalID} ( <i>RebuttalProcess.aspx?RebuttalID={RebuttalID}</i> )
Case Name	Grid view Column			
Case Worker #	Grid view Column			

Review Date	Grid view Column			
Rebuttal Request Date	Grid view Column			
Rebuttal Status	Grid view Column			<p>There are 2 types of rebuttal status:</p> <ul style="list-style-type: none"> <li>• Pending - This status is applied for the rebuttal request that does not have any rebuttal conclusion ([RebuttalConclusion]).</li> <li>• Closed - This status is applied for the rebuttal request that does have at least a rebuttal conclusion ([RebuttalConclusion]).</li> </ul>

### Rebuttal Process Page (RebuttalProcess.aspx)

Page Description: This page allows the MCRS user (except the Case worker profile) to process the Case workers rebuttal requests. This page shows two sections: Case Information and Rebuttal Requests Process panel.

- The first section is the General Case Information panel located on the left of the screen.
- The second section allows too process the case workers rebuttal requests.

Page Name: RebuttalProcess.aspx

# Medi-Cal Case Review

STARs Integrated Database Medi-Cal Case Review System Website

[My Desktop](#) | 
 [Case Selectors](#) | 
 [Rebuttals](#) | 
 [Correction Due](#) | 
 [Reports](#) | 
 [Administration](#)

**Case Information**

**Application Date:**  
05/02/2006

**Review Date:**  
05/19/2008 8:42:44 AM

**Case Name:**  
[REDACTED]

**Case Number:**  
111 [REDACTED]

**Worker Name:**  
[REDACTED]

**File Number:**  
36LS01 [REDACTED]

**Reviewer Name:**  
[REDACTED]

**Supervisor Name:**  
[REDACTED]

**Review Type:**  
MC-Tier I

**Review Information**

**Review Status:**  
In Progress

**Review Statistic:**  
View Score Card

H: 3  
P: 1

**Review Comments:**  
unable to verify 285 A-1 from last RE also no 3/08 QR 7 on file or imaged unable to determine income correct, unable to determine if shelter, utility, and child care deduction correct as verif not imaged or on file. no journal entries.

**Rebuttal Items**

ID	Rebuttal Date	Rebuttal Information	Remove Error	Conclusion
14	05/22/2008	<p><b>Caseworker Declaration:</b> Correct verification of identity is in case record</p> <p><b>Conclusions:</b> [REDACTED] 05/21/2008 - Error Unremoved - No verification of identify in case record</p>	<input type="radio"/> Yes  <input checked="" type="radio"/> No	
16	05/22/2008	<p><b>Caseworker Declaration:</b> Correct verification of identity is in case record</p> <p><b>Conclusions:</b> [REDACTED] 05/21/2008 - Error Unremoved - No verification of identify in case record</p>	<input type="radio"/> Yes  <input checked="" type="radio"/> No	
17	05/22/2008	<p><b>Caseworker Declaration:</b> Correct verification of identity is in case record</p> <p><b>Conclusions:</b> [REDACTED] 05/21/2008 - Error Unremoved - No verification of identify in case record</p>	<input type="radio"/> Yes  <input checked="" type="radio"/> No	

**Reviewed Questionnaire**

(Click here to collapse or expand content)



**Case Information**

Application Date:  
05/02/2006  
Review Date:  
05/19/2008 8:42:44 AM  
Case Name:  
[REDACTED]  
Case Number:  
111 [REDACTED]  
Worker Name:  
[REDACTED]  
File Number:  
36LS01 [REDACTED]  
Reviewer Name:  
[REDACTED]  
Supervisor Name:  
[REDACTED]  
Review Type:  
MC-Tier I

**Review Information**

Review Status:  
In Progress  
Review Statistic:  
View Score Card  
H: 3  
P: 1

Review Comments:  
unable to verify 285 A-1 from last RE also no 3/08 QR 7 on file or imaged unable to determine income correct, unable to determine if shelter, utility, and child care deduction correct as verif not imaged or on file. no journal entries.

**Rebuttal Items**

ID	Rebuttal Date	Rebuttal Information	Remove Error	Conclusion
14	05/22/2008	<p><b>Caseworker Declaration:</b> Correct verification of identity is in case record.</p> <p><b>Conclusions:</b> [REDACTED] 05/21/2008 - Error Unremoved - No verification of identity in case record.</p>	<input type="radio"/> Yes  <input type="radio"/> No	
16	05/22/2008	<p><b>Caseworker Declaration:</b> Correct verification of identity is in case record.</p> <p><b>Conclusions:</b> [REDACTED] 05/21/2008 - Error Unremoved - No verification of identity in case record.</p>	<input type="radio"/> Yes  <input type="radio"/> No	
17	05/22/2008	<p><b>Caseworker Declaration:</b> Correct verification of identity is in case record.</p> <p><b>Conclusions:</b> [REDACTED] 05/21/2008 - Error Unremoved - No verification of identity in case record.</p>	<input type="radio"/> Yes  <input type="radio"/> No	

**Reviewed Questionnaire**

(Click here to collapse or expand content)

ID	Question	Y	N	NA
----	----------	---	---	----

**CASE SUMMARY**

- 1 (?) Is the RE date correct?  Y  N  NA
- 2 (?) Was the correct beginning date of aid determined?  Y  N  NA
- 3 (?) Is the Medi-Cal Program Type correct for each program person?  Y  N  NA
- 4 (?) If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?  Y  N  NA

**CASE CONTACT**

- 5 (?) Is the correct address entered for each MFBU member?  Y  N  NA

Page Controls:

This page contains two sections.

Section 1: The first section is the General Case Information panel located on the left of the screen.

Label	Type - Descriptions
Case Information	Web User Control - This user control displays the information of the selected case (URL parameter CaseReviewID).
Application Date	Label - Data is populated based on the URL parameter CaseReviewID.
Review Date	Label - This label displays the server date & time.
Case Name	Label - Data is populated based on the URL parameter CaseReviewID.
Case number	Label - Data is populated based on the URL parameter CaseReviewID.
Worker Name	Label - Data is populated based on the URL parameter CaseReviewID.
File Number	Label - Data is populated based on the URL parameter CaseReviewID.
Reviewer Name	Label - This label displays the logged-in username.
Supervisor Name	Label - Supervisor name of the logged-in user.
Review Type	Label - Data is populated based on the URL parameter CaseReviewID.
Review Status	- There are 3 types of Review Status: Not started - This status is applied for a review that does not have a Start Date ([CaseReview].[ CaseReviewStartDate] is null). In progress - This status is applied for a review that does have a Start Date ([CaseReview].[ CaseReviewStartDate] is not null) and does not have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is null).

	Completed - This status is applied for a review that does have a Completed Date ([CaseReview].[CaseReviewCompletedDate] is not null).
View Score Card	OnClick: it will link to ScoreCard.aspx.
H: [#]	This label provides the count number of "H" answer.
P: [#]	This label provides the count number of "P" answer.
Review Comments	Text box - This will displays the review comments. This textbox will be in disable mode.

Section 2: The second section is the rebuttal request form and the read-only detailed version of the reviewed questionnaire.

Label	Type - Descriptions
Rebuttal Request Processor Control	Web User Control
ID	Label - This is the order number of the question in the review questionnaire.
Rebuttal Date	Label - The text of this label is populated based on the selection of the above checkbox list control.
Rebuttal Information	This session provides the following information: <ul style="list-style-type: none"> <li>• Case worker Declaration</li> <li>• Conclusions <ul style="list-style-type: none"> <li>○ Responded by</li> <li>○ Responded on</li> <li>○ Error removal decision</li> <li>○ Conclusion description</li> </ul> </li> </ul>
Remove Error	Yes/ No Checkbox list
Conclusion	Textbox - This field becomes required if user makes selection on the above "Remove Error" checkbox.
Submit	Button - OnClick: the application will validate the data in the above form and save it to the database ([CaseReviewRebuttal]).

Reset	Button - OnClick: refresh the Rebuttal Request Page
Reviewed Questionnaire	Link Button - This link is implemented with the Collapsible Control Extender to show or hide the detailed reviewer questionnaire.

### Correction Due Page (Correctiondue.aspx)

Page Description: This page will allow the user to pull a list of cases with Corrections due by worker number and review month. Cases that have been corrected will not appear in the list.

Page Name: CorrectionsDue.aspx

Page Layout:

**Medi-Cal Case Review**  
STARS Integrated Database Medi-Cal Case Review System Website

Logged In: Minh Le Hoang | Logout

My Desktop Case Selectors Rebuttals **Correction Due** Reports Administration

**Search for a case**

Case Number:  District:  Case Worker:   Just Worker I Supervise

History Search

**Review Month**

<< Prev. April 2008 Next >>

**Case List**

Case Name	Case Number	Review Date	Due Date	Correction Completed / Approved	Correction Date	Extend Due Date
	MC-156	05/15/2008	06/21/2008	<input type="checkbox"/>		<input type="button" value="E"/>
	MC-136	05/17/2008	06/30/2008	<input type="checkbox"/>		<input type="button" value="E"/>
	MC-336	05/18/2008	06/31/2008	<input type="checkbox"/>		<input type="button" value="E"/>

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Case Worker

### EXTENDED CORRECTION DUE DATE INFORMATION


Original Due Date      05/25/2008

Extended Due Date     

Extended By             

Extended On

Label	Type	Source	Validation	Remarks
Correction Due Lookup	Web User Control			
District	List box	refDistrict Office	Required field	
Case Worker	List box	Person - WorkerN umber	Required field	This list box will automatically populate the case worker in the selected district.
Get Cases	Button			OnClick: display the Correction Due List Control
Correction Due List	Web User Control	ErrorCas ereview - Case		
Case Number	Grid view column	Case		
Case Name	Grid view column	Case		
Review Date	Grid view column	ErrorCas ereview. CaseRevi ewCompl etedDate		

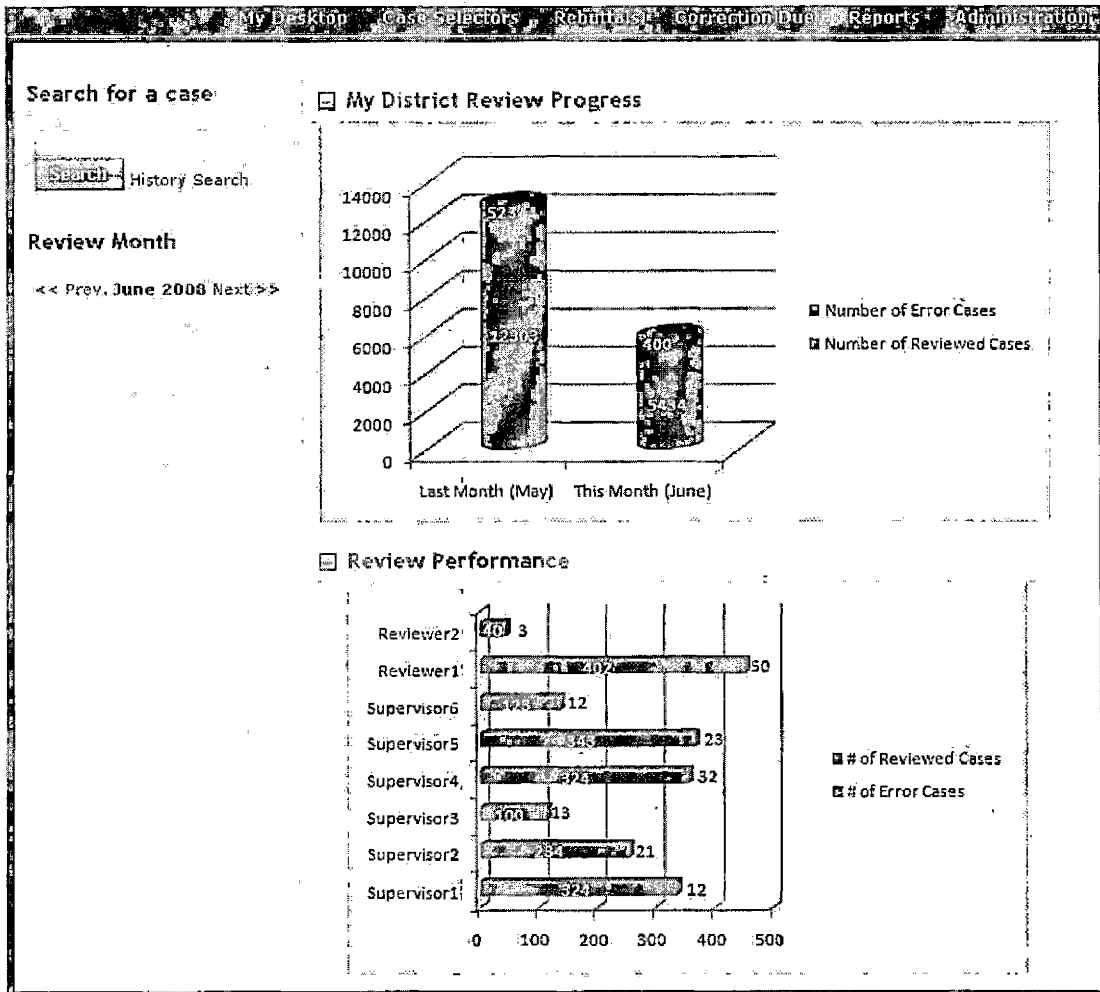
Due Date	Grid view column	ErrorCaseReview.CorrectionDueDate		
Correction Completed / Approved By	Grid view column - Checkbox			OnClickChanged: if the box is checked, the application will populate the logged-in user's name and the server's date on the textbox in [Correction Date] column.
Correction Date	Grid view column-Textbox		Date field	
Extend Due Date 	Grid view column-Image button			OnClick: display a modal popup that allows the District Manager to extend the correction due date. (Screenshot 5.15_2)
Submit	Button			OnClick: validate and save the data in the form to the database [CaseReview].
Reset	Button			Clear all entries. Message displays to alert users about losing last entries.
Extended Correction Due Date	Web User Control	ErrorCaseReview		
Original Due Date	Label	ErrorCaseReview.OriginalDueDate		
Extended Due Date	Textbox	ErrorCaseReview.OriginalDueDate		
Extended by	Label	ErrorCaseReview.ExtendedBy		Logged-in user's name
Extended by	Textbox	ErrorCaseReview.ExtendedOn		Server's date

## Manager Desktop Page (ManagerDesktop.aspx)

Page Description: This page will allow the CAS, RS and District Manager to oversee the review progress of the whole district and the review performance of each individual reviewer.

Page Name: ManagerDesktop.aspx

Page Layout:



Page Controls:

<i>Label</i>	<i>Type</i>	<i>Remarks</i>
My District Review Progress	Web User Control	This control displays the "My district review progress" stacked cylinder chart to compare between the current review progress and the last month review. The chart shall be generated every day and after business hours (6 PM) using infragistics web chart control.
My District Review Progress	Web User Control	This control displays the "My district review performance" stacked bar chart to represent the review performance among of the reviewer within a district. The chart shall be generated every day and after business hours (6 PM) using infragistics web chart control.

Report Page (Report.aspx)

Page Description: This page allows authorized users to view reports. Depend on the chosen filters, the selected report will display in the report page.

Page Name: Report.aspx

Initial load process: Only authorized people have accessed to this object.

To access this page, users need to select the Reports from the main menu.

Page Layout:



<b>Report Information:</b>		<input type="checkbox"/> <b>Report Selection</b>	
<b>Report Group:</b> Other	Report Group	Other	
<b>Report:</b> Case Review Summary Report	Reports	Case Review Summary Report	
<b>Month:</b> June/2008		<input type="checkbox"/> <b>Filter Selection</b>	
The enable parameters will filter your report.			
<b>Report Selector</b>	Month	June/2008	
	From:		
	To:		
<b>DETAIL REPORTS</b>	Region:	All	
<b>County by Region</b>	District:	All	
<b>Region by District</b>	Supervisor:	All	
<b>District by Supervisor</b>	Worker:	All	
<b>Supervisor by Worker</b>	(Re-) reviewer:	Peter White	
<b>Worker by Question</b>			
<b>Question by Worker</b>			
		<input type="button" value="Get Report"/>	

Page Control:

Section 1: Report Information

Label	Type	Remarks
Report Group	Label	This label displays the selection of the [Report Group] Drop Down Listbox.
Reports	Label	This label displays the selection of the [Reports] Listbox.
Month	Label	This label displays the selection of the [Month] Drop Down Listbox.
Report Selector	Web user Control	This control displays the selection in the [Reports] dropdown listbox into a Data List Control.

Section 2:

Label	Type	Source	Validation	Remarks
Report Selection				Heading section

Report Group	List box	Report Type		Detail Top 5 Error Trend Report Trend Correct/Incorrect Re-Review Other
Reports	List box	ReportType - ApplicationR eport		Report list will be populated based on the [Report Group]'s selection.
Filter Selection	Label			Heading section
Month	List box			Month year
From	textbox		Date field	
To	Textbox			
Region	List box	Region table	Active Region	All [Active Region]
District	List box	District Table	Active District	All [Active District] based on the Region DDL's selection
Supervisor	List box		Active Supervisor	All [Active Supervisor] based on District's selection
Worker	List box		Active Worker	All [Active Worker] based on District's selection
(Re-)reviewer	List box		Active (Re-)reviewer]	All [Active (Re-)reviewer] based on selected district
Get Report	Button			OnClick: Validate the reporting criteria and open selected report on a popup page.

### Report Navigation:

There are 22 available reports.

Report #	Report Name	Name of Group
1	Discrepancy found by Re-Reviewer Detail	Re-Review
2	Top 5 Discrepancy found by Re-Reviewer Error Trend	Re-Review
3	Reviewer Proficiency Report	Re-Review
4	Incomplete reviews By Reviewer	Re-Review
5	Incomplete re-reviews By Re-Reviewer	Re-Review
6	Completed Counts By Reviewer	Re-Review
7	Completed Counts By Re-Reviewer	Re-Review
8	Delinquent Case Corrections	Other

9	Corrections Completed Detailed Report	Other
10	Rebuttal Removed Report	Other
11	Case Review Summary	Other
12	County By Region Detail	Detail
13	Detail Report-District by Supervisor	Detail
14	Detail Report-Region by District	Detail
15	Detail Report-Supervisor by Worker	Detail
16	Detail Report-Worker by Question-Group by Date	Detail
17	Detail Report-Worker by Question-Group by Question	Detail
18	Top 5 Error Trend Report-County	Top 5 Error Trend Report
19	Top 5 Error Trend Report-District	Top 5 Error Trend Report
20	Top 5 Error Trend Report-Region	Top 5 Error Trend Report
21	Top 5 Error Trend Report-Supervisor	Top 5 Error Trend Report
22	Top 5 Error Trend Report-Worker	Top 5 Error Trend Report

Common Report Format:

Unless indicated all reports will have the same following format:

- Page number will be located at the top of each page. Ex: Page 1 of 2
- The header records are listed like below:

Header Record #	Description	Location
1	San Bernardino County Human Services	Top left justified
2	Transitional Assistance Department	Top right justified
3	The blank line	
4	Report Name	Left justified
5	Medi-Cal	Centered

Example of the header report:

Report # 12	
San Bernardino County Human Services	Transitional Assistance Department
County by Region Detail Report	Medi-Cal
	Review Month: June 2008

- Print Time will be located at the bottom left of each page. Ex: Tuesday August 26, 2008 10:38:30 Am.
- The WorkerID is the identification that worker has from SAFE system, not from C-IV. Ex: B1234.
- If the selected report does not require users to select a list box then that list box should be disabled to choose from.
- The validation will be available to generate any report for the required list boxes. Any list box is not required to select report, it will be disabled.
- If a selected report requires the From and To filters for selection, the From Month list box must be selected first before the To Month list box.

Other Report Clarifications:

- If a case has at least 1 error, then it is an error case and is the subject to be reported.
- If a case has at least 1 "Hard" error, then this case is a "Hard error case".
- If a case has at least 1 "Procedural" error, then this case is a "Procedural error case".
- "Question #" is just the position order number of a question in a questionnaire.
- Discrepancy occurs when re-review check box is marked.

Supervisory Tool for Accurate Reviews						
ID	Question	Y	F	P	NA	RE-REVIEW
<b>CASE SUMMARY</b>						
1 (?)	Is the RE date correct?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 (?)	Was the correct beginning date of aid determined?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the above screenshot, the question 1 has discrepancy because this question has the check mark on the check box. The question 2 is not. Look into the question #1, it will not tell users what type of discrepancy or differences between reviewer or re-reviewer (it could be Y or H or P or NA). By counting the number of check mark(s) in the Re-review column, the application will be able to tell how many discrepancies.

#### Administration Page (Admin/default.aspx)

Page Description: This page is the central place that allows the ITSD support staff and MCRS Administrator navigate to different administration sections such as:

- Administration the application settings and business rule settings section.
- Administration the lookup tables section
- Administration the application security settings section
- Administration Review Questionnaires section.

Page Name: Admin/default.aspx

Initial load process: Only authorized people have access to this page (ITSD support staff and MCRS System Administrator)

Page Layout:

Logged In: Migh, Le, Hoang | Logout

# Medi-Cal Case Review

STARS Integrated Database Medi-Cal Case Review System Website

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[My Desktop](#)  
 [Case Selectors](#)  
 [Rebuttals](#)  
 [Correction Due](#)  
 [Reports](#)  
 [Administration](#)

**Search for a case**

Case Number

[History Search](#)

- Application Administration**
  - Application Settings**  
Edit Application Settings
  - Business Rules**  
Adjust Business Rules
- Lookup Table Maintenance**
  - Regions**  
Add/Edit/Delete Region(s)
  - Districts**  
Add/Edit/Delete District(s)
  - Position**  
Add/Edit/Delete Position(s)
  - Program** (This feature is not available at this current development phase.)  
Add/Edit/Delete Program(s)
- Security Administration**
  - User Security Settings**  
Add/Edit/Delete Users and Users' profiles
  - Roles & Rights Settings (Redirect to SAFE)**  
Redirect to SAFE web application
- Review Administration**
  - Reviews** (This feature is not available at this current development phase.)  
Add/Edit/Delete review(s)
  - Questionnaire Builder**  
Questionnaire Builder allows to add/edit/delete question(s) in a review.

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Page Control:

Label	Type	Remarks
Application Administration	Label	This section provides the ability to adjust the application settings and business rule variables (for IT staff use only).
Application Settings	Link	The ability to build / modify the questionnaire reviews. OnClick: redirect to the Application Settings Page (admin/applicationSettings.aspx)

Business Rules	Link	OnClick: redirect to the Business Rules Page (admin/BusinessRules.aspx)
Lookup Table Maintenance	Label	This section provides the ability to maintain the lookup tables.
Region	Link	OnClick: redirect to the Maintenance Page and pass the "table name" URL parameter (maintenance.aspx?Table=Region)
District	Link	OnClick: redirect to the Maintenance Page and pass the "table name" URL parameter (maintenance.aspx?Table=District)
District	Link	OnClick: redirect to the Maintenance Page and pass the "table name" URL parameter (maintenance.aspx?Table=District)
Position	Link	OnClick: redirect to the Maintenance Page and pass the "table name" URL parameter (maintenance.aspx?Table=District)
Security Administration	Label	This section provides the ability to manage the application security settings.
User Security Settings	Link	OnClick: redirect to the Case Review User Security page (CRUser.aspx)
Roles & Rights Settings (Redirect to SAFE)	Link	OnClick: redirect to SAFE web application and pass application name "CaseReview"
Review Administration	Label	This section provides the ability to build / modify the questionnaire reviews.
Questionnaire Builder	Link	OnClick: redirect to the Questionnaire Page (Questionnaire.aspx)

### Application Settings Page (Admin/ApplicationSettings.aspx)

Page Description: This page allows the ITSD support staff update the application settings.

Page Name: Admin/applicationSettings.aspx

Initial load process: Only authorized people have access to this page (ITSD support staff)

Page Layout:

Page Control:

Label	Type	Remarks
Application Time out	Textbox	The value on this textbox comes from the web.config - application settings. The application Timeout's unit is in second.
Application Support Email	Textbox	The value on this textbox comes from the web.config - application settings. This textbox stores the application supporting email where the application errors will be sent to this email address.



SAFE web service URL	Textbox	The value on this textbox comes from the web.config - application settings. This stores the SAFE Web Service Address.
Application Name	Textbox	The value on this textbox comes from the web.config - application settings. This stores the Application Name registered in SAFE Database (ex. "CaseReview").
SMTP server	Textbox	The value on this textbox comes from the web.config - application settings. This stores the SMTP Server address.
Save	Button	OnClick: write the above values into the according application setting key in the web.config.
Reset	Button	OnClick: reload this page

### Business Rules Page (Admin/BusinessRules.aspx)

Page Description: This page allows the ITSD support staff and TAD administrator(s) to update the business rules what drive this MCRS.

Page Name: Admin/BusinessRules.aspx

Initial load process: Only authorized people have access to this page (ITSD support staff and TAD Administrator)

Page Layout:

**Page Control:**

Label	Type	Sources	Validation	Remarks
Number of reviewing cases for Case worker with "regular" status	Textbox	[ConfCasePull]	Integer	[ConfCasePull].GroupName = 'Regular'
Number of reviewing cases for Case worker with "performance issue" status	Textbox	[ConfCasePull]	Integer	[ConfCasePull].GroupName = 'Performance'
Number of reviewing cases for Case worker with "probationary" status	Textbox	[ConfCasePull]	Integer	[ConfCasePull].GroupName = probationary

Number of days allowed to rebut an error	Textbox	[ConfErrorCorrection]. DayForRebttal	Integer	
Number of days allowed to correct an error	Textbox	[ConfErrorCorrection]. DayForCorrectError	Integer	
Number of recent reviews displayed in My Desktop page	Textbox	[ConfInterface]. NumberofRecentReview	Integer	
Save	Button			OnClick: save the above values into the according configuration database table.
Reset	Button			OnClick: reload this page

### Table Maintenance Page (Admin/maintenance.aspx)

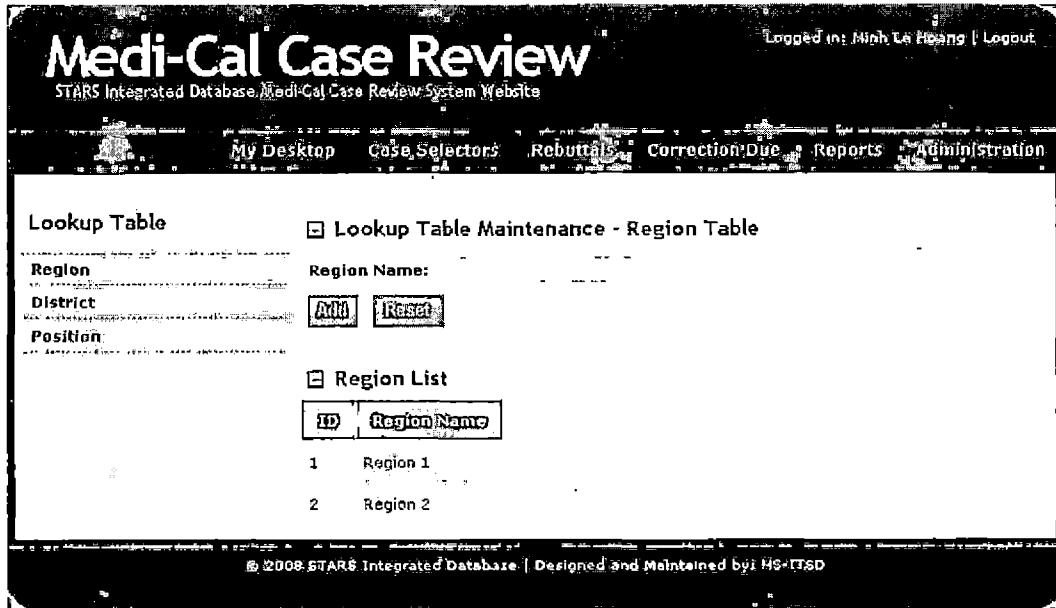
Page Description: Those pages will allow the user to add, edit, and deactivate the list items in the list boxes throughout the application. The deactivated items are still in the database, but they will disappear in the application. In this document, we just show you only one maintenance table which is Region. The others are very much the same. There are four maintenance tables:

- Region: The County of San Bernardino will have number of regions. Those regions will be listing over here.
- District: In each region, it will have a number of districts.
- Position: Each county has its own job title. Ex: EWI, EWII, EWIII, EWS, RS, DM.

- Program: The activities that application will need to perform. In this development, the program is Medi-Cal Case Review.

Page Name: Admin/Maintenance.aspx.

Page Layout:



Page Control:

Label	Type	Source	Validation	Remarks
Region Name	Text box	refRegion	Required field	
Add / Update	Button			In the initial load, this "form view" control is loaded in "Add" mode. In "Add" mode, this button text is "Add". On click event, the application will validate the data in the above form and save it to the database (refRegion). If there is already an inactive region in the table, the system will re-activate the existing record. In "Edit" mode, this button text is "Edit". On click event, the

				application will validate the data in the above form and update the record to the database (refRegion) based on the hidden ID.
Delete	Button			This button is only available in the "Edit" mode. On the click event, the application will create a message that record is about to delete. It is up to the user either to cancel the action or Ok to deactivate the item.
Reset	Button			OnClick: reload the page
Region List	Grid View Control			Display the active Region Name(s)
ID	Grid View Column			
Region Name	Grid View Column - Link			OnClick: change the above form view to the "Edit" mode and populate the region name into the above [Region Name] text box and the ID into an ID hidden field.

### Questionnaire page (Admin/questionnaire.aspx)

Page Description: This page displays the list of questionnaires (reviews) available in the system. Through this page, users MRC administrators allow to configure the review period (number of month after authorization month) and apply the re-review process to a review.

Page Name: Admin/Questionnaire.aspx.

Page Layout:

Medi-Cal Case Review  
 STARS Integrated Database / Medi-Cal Case Review / Screen 1 / Build  
 Logged In: Minnie Le... / Logout

My Desktop Case Selectors Rebutals Correction Due Reports Administration

Welcome to Medi-Cal Case Review Questionnaire Builder

Questionnaire List

Review Name	Review Type	Review Time (# of month after authorization date)	Review Required
Tier I review	Continuing	1	<input checked="" type="checkbox"/>
Intake review	Intake	NA	<input type="checkbox"/>

Submit

© 2008 STARS Integrated Database / Design and Maintenance / Minnie Le...

Page Control:

Label	Type	Source	Remarks
Review Name	Link	[ReviewQuestionnaire].QuestionnaireName	OnClick: redirect to the Questionnaire Builder Page and pass the [ReviewQuestionnaireID] ( <i>QuestionnaireBuilder.aspx?RQID={ReviewQuestionnaireID}</i> )
Review Type	List box	[ReviewType].ReviewTypeName	
Review Time	List box	0 - 12 (integer)	The number in the list box indicates the number of months after authorization month.
Submit	Button		OnClick: save the above data

Questionnaire Builder page  
(Admin/questionnairebuilder.aspx)

Page Description: This page is the questionnaire constructing workspace which allows MCRS administrator to administer the questionnaires (reviews). Here are the main uses of this page:

- Add new question
- Edit an existing question
- Add new question's group
- Edit a question's group
- Move the position of a question
- Move the position of a group
- Create rules and logics on a group
- Create rules and logics on a question

Page Name: Admin/QuestionnaireBuilder.aspx.

Page Layout:

Review Month: **September - 2003**

**Tier I Review**

- New Question
- New Group
- Case Summary
- Case Contact
- Root Questions - Application
- Individual Demographics
- Household Status
- Relationships
- Citizenship
- Pregnancy
- Residency
- Other Program Assistance

**Tier I Review Questionnaire Builder**

Question	Question	Y	N	NA
<b>▼ CASE SUMMARY [Edit Group   Group Conditions]</b>				
	[Edit   Question Conditions]			
1 (?)	Is the RE date correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▼ ▲ [Edit   Question Conditions]</b>				
2 (?)	Was the correct beginning date of aid determined?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▼ ▲ [Edit   Question Conditions]</b>				
3 (?)	Is the Medi-Cal Program Type correct for each program person?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▲ [Edit   Question Conditions]</b>				
4 (?)	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▼ ▲ CASE CONTACT [Edit Group   Group Conditions]</b>				
<b>▼ ▲ ROOT QUESTIONS [Edit Group   Group Conditions]</b>				
<b>▼ ▲ INDIVIDUAL DEMOGRAPHIC [Edit Group   Group Conditions]</b>				
<b>▼ ▲ HOUSEHOLD STATUS [Edit Group   Group Conditions]</b>				
<b>▼ ▲ RELATIONSHIPS [Edit Group   Group Conditions]</b>				
<b>▼ ▲ CITIZENSHIP [Edit Group   Group Conditions]</b>				
<b>▼ ▲ PREGNANCY [Edit Group   Group Conditions]</b>				
<b>▼ ▲ RESIDENCY [Edit Group   Group Conditions]</b>				
<b>▼ ▲ OTHER PRG. ASSISTANCE [Edit Group   Group Conditions]</b>				
<b>▲ ELIGIBILITY NON-COMPLIANCE [Edit Group   Group Conditions]</b>				

**Tier I Review**



- New Question
- New Group
- Case Summary
- Case Contact
- Root Questions - Application
- Individual Demographics
- Household Status
- Relationships
- Citizenship
- Pregnancy
- Residency
- Other Program Assistance



**Tier I Review Questionnaire Builder**


Question	Question	Y	N	NA
<b>▼ CASE SUMMARY [Edit Group   Group Conditions]</b>				
	[Edit   Question Conditions]			
1 (?)	Is the RE date correct?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▼ ▲ [Edit   Question Conditions]</b>				
2 (?)	Was the correct beginning date of aid determined?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▼ ▲ [Edit   Question Conditions]</b>				
3 (?)	Is the Medi-Cal Program Type correct for each program person?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▲ [Edit   Question Conditions]</b>				
4 (?)	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>▼ ▲ CASE CONTACT [Edit Group   Group Conditions]</b>				
<b>▼ ▲ ROOT QUESTIONS [Edit Group   Group Conditions]</b>				
<b>▼ ▲ INDIVIDUAL DEMOGRAPHIC [Edit Group   Group Conditions]</b>				



Page Control:

Label	Type	Source	Remarks
Review Month	List box	Current month & a month after	<p>The review month will default in current month.</p> <p>OnSelectChanged: If user change the list box to the next month, the application displays an information message that states: "All of the new change(s) will be effective on 01/{selected month}/20XX". After the message, the application checks the database and find if there already existed the same review questionnaire in the {selected month}; then the application will load the new review questionnaire.</p> <p>If the user changes back to the current month, the application displays an information message that states: "All of the changes will be effective immediately to the review questionnaire and reports.</p> <p>If the user makes changes to the questionnaire and there is no review questionnaire for the selected month stored in the database, the application must clone the latest questionnaire including the following data table [QuestionGroup],[Question],[Answer],[QuestionCondition],[GroupCondition] and [ConditionRule]. After cloning the latest questionnaire for the selected month questionnaire, all of the changes will only be applied on the selected month questionnaire.</p>
New Question	Link		OnClick: open New question Page (QuestionChoice.aspx)
New Group	Link		OnClick: open New Group Page (newgroup.aspx)
Questionnaire Tree View	Web User Control - Tree View		This tree view displays the hierarchy of the questionnaire. The folder presents for the question group and the inside nodes are the questions.
Tree view folders (question's groups) 	Image button		<p>OnClick: expand the selected question's group of the questionnaire in the right side panel.</p> <p>The screenshot 5.22_2 presents the behavior of the OnClick event when user clicks on the "Case Summary" question's group. The "Case Summary" group in the right side panel is expanded.</p>
Tree view nodes (questions)  Q1	Image button		OnClick: open page Question Page (Question.aspx) and pass the {QuestionID} of the selected question.

Questionnaire Control	Web User Control		This is the whole questionnaire including the controlled buttons in the right side panel.
Questionnaire Header	HTML table		 This is just a static html table that displays the standard question format of Medi-Cal Case Review.
Question's Group Row	Web User Control	▼ <b>CASE SUMMARY [Edit Group   Group Conditions]</b>	
Move Group Controls ▼ ▲	Image buttons		The buttons stand next to the Group name. If first Group only has the down ( ▼ ) button. The last Group only has the up ( ▲ ) button.  OnClick of the ▲ : move the selected group above the previous group.  OnClick of the ▼ : move the selected group below the next group.
Edit Group	Link		OnClick: open the Edit Group Page (EditGroup.aspx) and pass the {groupID} of the selected group.
Group Conditions	Link		OnClick: open the Group Condition Page (GroupCondition.aspx) and pass the {groupID} of the selected group.
Question Row	Web User Control	▼ [Edit   Question Conditions] 1 (?) Is the RE date correct? <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Move Question buttons ▼ ▲	Image Button		The buttons stand above to the question sequence number. If first question in a group only has the down ( ▼ ) button. The last Group only has the up ( ▲ ) button.  OnClick of the ▼ : move the selected question above the previous question.  OnClick of the ▲ : move the selected question below the next question.
Toolbox (?)	Link		OnClick: open the Tool Box page (toolbox.aspx) and pass the {questionID} of the selected question.
Question Edit	Link		OnClick: open page Question Page (Question.aspx) and pass the {QuestionID} of the selected question.
Question Conditions	Link		OnClick: open the Question Condition Page (QuestionCondition.aspx) and pass the {groupID} of the selected Question.
Expand Button 	Image		OnClick: Eepand the under section

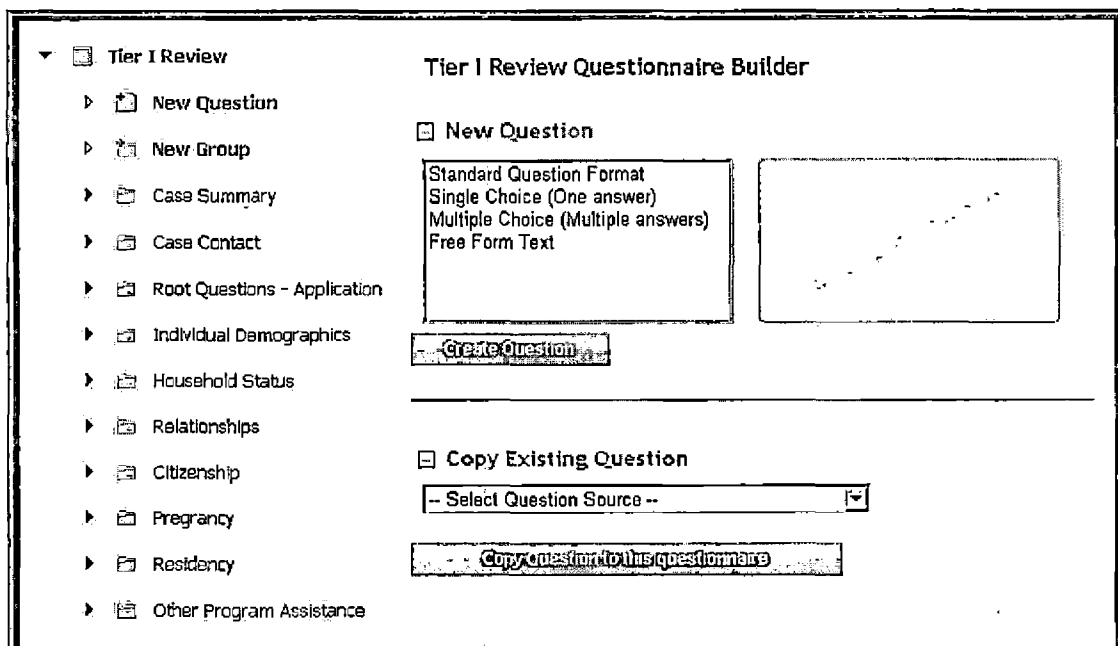
	Button		
Collapse Button 	Image Button		OnClick: collapse the under section

### New Question page (Admin/QuestionChoice.aspx)

Page Description: This page allows users to make a choice on the type of question that they want to create.

Page Name: Admin/QuestionChoice.aspx.

Page Layout:



**Tier I Review**

- ▶ New Question
- ▶ New Group
- ▶ Case Summary
- ▶ Case Contact
- ▶ Root Questions - Application
- ▶ Individual Demographics
- ▶ Household Status
- ▶ Relationships
- ▶ Citizenship
- ▶ Pregnancy
- ▶ Residency
- ▶ Other Program Assistance

**Tier I Review Questionnaire Builder**

**New Question**

Standard Question Format  
 Single Choice (One answer)  
 Multiple Choice (Multiple answers)  
 Free Form Text

---

**Copy Existing Question**

-- Select Question Source --

Page Control:

Label	Type	Source	Remarks
-------	------	--------	---------

Question Type	List Box	[QuestionType]. Description	This list box contains the question types that the application supports. User has a choice to create the question within the following types: <ul style="list-style-type: none"> <li>Standard Question Format - This type of question is the one single choice type of question. The choices are pre-defined as "Y", "P", "H" and "NA".</li> <li>Single Choice - This type of question is also the one single choice type of question. User can freely create the custom choices.</li> <li>Multiple Choice - This type of question is the multiple choices type of question. User can freely create the custom choices.</li> <li>Free Form Text - In this type of question, the answer is a free form textbox.</li> </ul>
Sample Screenshot	Image	[QuestionType]. ScreenshotURL	This image control provides users the visual aid to help making choice of the question type. The image is dynamically loaded based on the selection of the question type.
Create Button	Button		OnClick: open the Question Page and pass the parameter {questionID=0} to indicate a new question. The URL is also passed the selected type of question ({QuestionTypeID}) <i>Question.aspx?QuestionID=0&amp;QuestionTypeID={questionTypeID}</i>
Copy Existing Question	Web User Control	Before select the question Source: <input type="checkbox"/> Copy Existing Question <input type="text" value="-- Select Question Source --"/> <input type="button" value="Copy Question to the questionnaire"/> <hr/> After select the question source: <input type="checkbox"/> Copy Existing Question <input type="text" value="Tier I Questionnaire"/> <input type="text" value="-- Select Question --"/> <input type="text" value="-- Select Question --"/> Is the RE date correct? Was the correct beginning date of aid determined? Is the Medi-Cal Program Type correct for each program person? If the Medi-Cal Program Type is related to a waiver program, is the appropriate? Is the correct address entered for each MFBU member? Is there a complete Statement of Facts (MC210, MC210RY, SAW52, etc)?	
Question source	Drop Down List box	[ReviewQuestionnaire].QuestionnaireName	OnSelectChanged: make an ajax callback to display the Question List drop down list box
Question List Box	Drop Down List box	Question	Based on the Question Source selection, this ddl will populate accordingly.
Copy Question to this questionnaire	Button		OnClick: open the Question Page and pass the parameter {questionID=0} to indicate a new question. The URL shall also pass the questionID of the question that user want to clone to create a

re			new question. <i>Question.aspx?QuestionID=0&amp;FromQuestionID={ FromQuestionID}</i>
----	--	--	---

### Question page (Admin/Question.aspx)

Page Description: This page allows user to construct the questions and answers.

This same page can support both adding and editing a question within the following types:

- Standard Question Format - This type of question is the one single choice type of question. The choices are pre-defined as "Y", "P", "H" and "NA"
- Single Choice question- This type of question is also the one single choice type of question. User can freely create the custom choices.
- Multiple Choice question- This type of question is the multiple choices type of question. User can freely create the custom choices.
- Free Form Text question- In this type of question, the answer is a free form textbox.

Initial load process: Since this page supports both adding and editing question process and different type of question, the page will be loaded dynamically depending on the {QuestionID} parameter. If the Question ID is equal to "0", then there will be a {questionTypeID} parameter. In this case, the page shall be ready to support the user to create a question in the defined question's type. If the Question ID parameter is not equal to "0", the page will load the selected question and be ready to support the user to edit the selected question.

Page Name: Admin/Question.aspx.

Page Layout:

- ▶ New Group
- ▼ Case Summary
  - ▶ Q1
  - ▶ Q2
  - ▶ Q3
  - ▶ Q4
- ▼ Case Contact
  - ▶ Q5
- ▼ Root Questions - Application
  - ▶ Q6
  - ▶ Q7
  - ▶ Q8
  - ▶ Q9
  - ▶ Q10
  - ▶ Q11
  - ▶ Q12
  - ▶ Q13
- ▼ Individual Demographics
  - ▶ Q14
  - ▶ Q15
  - ▶ Q16
  - ▶ Q17
- ▼ Household Status
  - ▶ Q18
- ▼ Relationships
  - ▶ Q19
- ▼ Citizenship
  - ▶ Q20
  - ▶ Q21
- ▼ Pregnancy
  - ▶ Q22
  - ▶ Q23
- ▼ Residency

Question Text - Single Choice

**B I U**

---

Choices (One choice per line)

- Y
- H
- P
- NA

---

Question's Position

Group:

Order:  Question

Position:

---

Tooltips

**B I U**

---

Display Option

Display mode:  Vertical  Horizontal

Answer display type:  Radio button  Dropdown list

Answer Selection required:

**Standard Question Format**

- ▶ **New Group**
- Case Summary
  - ▶ Q1
  - ▶ Q2
  - ▶ Q3
  - ▶ Q4
- ▼ Case Contact
  - ▶ Q5
- ▼ Root Questions - Application
  - ▶ Q6
  - ▶ Q7
  - ▶ Q8
  - ▶ Q9
  - ▶ Q10
  - ▶ Q11
  - ▶ Q12
  - ▶ Q13
- ▼ Individual Demographics
  - ▶ Q14
  - ▶ Q15
  - ▶ Q16
  - ▶ Q17
- ▼ Household Status
  - ▶ Q18
- ▼ Relationships
  - ▶ Q19
- ▼ Citizenship
  - ▶ Q20
  - ▶ Q21
- ▼ Pregnancy
  - ▶ Q22
  - ▶ Q23
- ▼ Residency
  - ▶ Q24

**Question Text - Single Choice**

**B I U** **AB** **≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡** **T X D X** **☺**

**Choices (One choice per line)**

**Question's Position**

Group:

Order:  Question

Position:

**Tooltips**

**B I U** **AB** **≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡** **T X D X** **☺**

**Display Options**

Display mode:  Vertical  Horizontal

Answer display type:  Radio button  Dropdown list

Answer selection required:

**add to question**

**Single Choice question**

- ▶  New Group
- ▶  Case Summary
  - ▶  Q1
  - ▶  Q2
  - ▶  Q3
  - ▶  Q4
- ▶  Case Contact
  - ▶  Q5
- ▶  Root Questions - Application
  - ▶  Q6
  - ▶  Q7
  - ▶  Q8
  - ▶  Q9
  - ▶  Q10
  - ▶  Q11
  - ▶  Q12
  - ▶  Q13
- ▶  Individual Demographics
  - ▶  Q14
  - ▶  Q15
  - ▶  Q16
  - ▶  Q17
- ▶  Household Status
  - ▶  Q18
- ▶  Relationships
  - ▶  Q19
- ▶  Citizenship
  - ▶  Q20
  - ▶  Q21
- ▶  Pregnancy
  - ▶  Q22
  - ▶  Q23
- ▶  Residency
  - ▶  Q24
- ▶  Other Program Assistance

Question Text - Multiple Choice

B
I
J
U
↺
H
=
=
=
=
=
=
T
K
S
X
↻

Choices (One choice per line)

Question's Position

Group:

Order:  Question

Position:

Tooltips

B
I
J
U
↺
H
=
=
=
=
=
=
T
K
S
X
↻

Display Options

Display mode:  Vertical  Horizontal

Answer display type:  Check box list

Answer Selection required:

**Multiple Choice Question**



▼  New Question

▶  New Group

▼  Case Summary

▶  Q1

▶  Q2

▶  Q3

▶  Q4

▼  Case Contact

▶  Q5

▼  Root Questions - Application

▶  Q6

▶  Q7

▶  Q8

▶  Q9

▶  Q10

▶  Q11

▶  Q12

▶  Q13

▼  Individual Demographics

▶  Q14

▶  Q15

▶  Q16

▶  Q17

▼  Household Status

▶  Q18

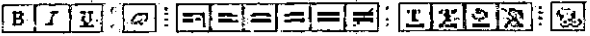
▼  Relationships

▶  Q19

▼  Citizenship

▶  Q20

### Question Text - Free Form Text



A rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List (bullet), Numbered List (1-2-3), Indent (left arrow), Outdent (right arrow), Undo (curved arrow), Redo (curved arrow), and Help (question mark).


### Question's Position

Group:

Order:  Question

Position:

### Tooltips



A rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List (bullet), Numbered List (1-2-3), Indent (left arrow), Outdent (right arrow), Undo (curved arrow), Redo (curved arrow), and Help (question mark).

### Display Option



Large Field

Required Field

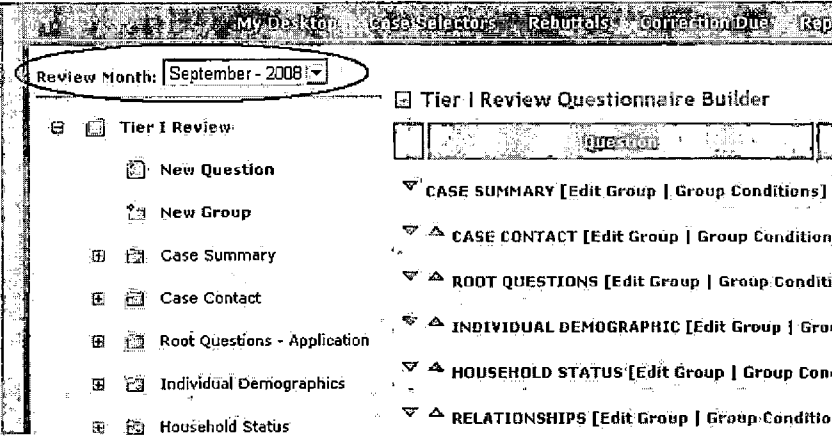
Validation

## Free Form Text Question

Page Control:

Label	Type	Source	Remarks
Question Text	About Text Editor	[Question].Question	This control only provides the simple and common text editor features.
Choices	Textbox (multiple line)	[Answer]	This textbox displays the answer choices of the question. One answer shall be in one line. If the question's type is the "Standard Format", then this control will be disabled and replaced with the static text listed "Y", "H", "P" and "NA".
Question Position	Web User Control	Question.DisplayOrder	<input type="checkbox"/> Question's Position Group: <input type="text" value="Case Contact"/>  Order: <input type="text" value="Before"/>  Question Position: <input type="text" value="Was the correct beginning date of aid determined?"/>
Group	Drop Down list box	QuestionGroup	OnSelectChanged: the Question drop down list box will be populated accordingly.
Before/After	Drop Down List box	"Before";"After"	
Question	Drop Down List box	QuestionGroup - Question	
Toolbox	About Text Editor	Question.Toolbox	
Display option	Web User Control	Each type of question has different display options: <ul style="list-style-type: none"> <li>Standard Format Question               <ul style="list-style-type: none"> <li><input type="checkbox"/> Display Option</li> <li>Display mode:                   <ul style="list-style-type: none"> <li><input type="radio"/> Vertical</li> <li><input type="radio"/> Horizontal</li> </ul> </li> <li>Answer display type:                   <ul style="list-style-type: none"> <li><input type="radio"/> Radio button</li> <li><input type="radio"/> Dropdown list</li> </ul> </li> <li>Answer Selection required: <input checked="" type="checkbox"/></li> <li><input type="text" value="Add new question"/></li> </ul> </li> <li>Single Answer Question</li> </ul>	

		<p><input type="checkbox"/> <b>Display Options</b></p> <p>Display mode: <input type="radio"/> Vertical <input type="radio"/> Horizontal</p> <p>Answer display type: <input type="radio"/> Radio button <input type="radio"/> Dropdown list</p> <p>Answer Selection required: <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>• <b>Multiple Choices Question</b></li> </ul> <p><input type="checkbox"/> <b>Display Options</b></p> <p>Display mode: <input type="radio"/> Vertical <input type="radio"/> Horizontal</p> <p>Answer display type: <input type="radio"/> Checkbox list</p> <p>Answer Selection required: <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>• <b>Free Form Text</b></li> </ul> <p><input type="checkbox"/> <b>Display Option</b></p> <p>Large Field <input type="checkbox"/></p> <p>Required Field <input type="checkbox"/></p> <p>Validation <input type="text" value="No Validation"/></p>	
Display Mode	Radio list	refLayoutMode	This control allows user to select the display's layout of the answer options.
Answer Display type	Radio list	QuestionType - AnswerType - ControlType	Depending on the question type, the answers can be displayed in different type of control. This section allows user to make choice within the available type of controls.
Required Field	Checkbox	Question.isRequired	This control helps the system determine whether that question is mandatory or not.
Large Field	Checkbox	QuestionType (larger textbox)	This option is only available for "Free form text" questions. The answer text box control will become multiple line textbox if this option is selected.
Validation	Drop down list box	refValidator	This option is only available for "Free form text" questions. By selecting the types of validation, the answer textbox will be validated accordingly.
Submit	Button	OnClick: save the above information to the database. Since the administrator decides to make modification to the questionnaire directly and intermediately or schedule the changes for next review month.	

		 <p>If administrator decides to make modification for this current review month:</p> <ul style="list-style-type: none"> <li>• If this is the first time user make modifications to this questionnaire within this current month (ReviewQuestionnaire.ReviewMonth &lt;&gt; {Current month}).       <ul style="list-style-type: none"> <li>➤ Then: Clone the whole questionnaire to a new questionnaire with the [ReviewQuestionnaire].ReviewMonth &lt;&gt; {Current month}.</li> <li>➤ Then: update the 2 columns [ReviewQuestionnaire].OutServiceMonth = {Current Month} and [ReviewQuestionnaire]. OutServiceBy = {logged-in user} of the old questionnaire.</li> <li>➤ And then: apply all of the changes to the new cloned questionnaire.</li> </ul> </li> <li>• If this is the first time user make modifications to this questionnaire within this current month (ReviewQuestionnaire.ReviewMonth = {Current month}).       <ul style="list-style-type: none"> <li>➤ Then: apply all of the changes to the questionnaire.</li> </ul> </li> </ul> <p>If administrator decides to make modification for this next review month:</p> <ul style="list-style-type: none"> <li>• If there were already existing a questionnaire with the [ReviewQuestionnaire].ReviewMonth = {next month}.       <ul style="list-style-type: none"> <li>➤ Then: apply all of the changes to this questionnaire with the [ReviewQuestionnaire].ReviewMonth = {next month}.</li> </ul> </li> <li>• If there does not exist a questionnaire with the [ReviewQuestionnaire].ReviewMonth = {next month}.       <ul style="list-style-type: none"> <li>➤ Then: Clone the whole questionnaire to a new questionnaire with the [ReviewQuestionnaire].ReviewMonth &lt;&gt; {next month}.</li> <li>➤ Then: update the 2 columns [ReviewQuestionnaire].OutServiceMonth = {next Month} and [ReviewQuestionnaire]. OutServiceBy = {logged-in</li> </ul> </li> </ul>
--	--	---

		<p>user} of the old questionnaire.</p> <ul style="list-style-type: none"><li>➤ And then: apply all of the changes to the new cloned questionnaire.</li></ul>
--	--	--

### Group Conditions page (Admin/GroupCondition.aspx)

Page Description: This page provides the ability to construct the conditions to disable a group of questions and automatically set the answers of the under questions to be "NA".

Page Name: Admin/GroupConditions.aspx.

Page Layout:

▼  Tier I Review

- ▶  New Question
- ▶  New Group
- ▼  Case Summary
  - ▶  Q1
  - ▶  Q2
  - ▶  Q3
  - ▶  Q4
- ▶  Case Contact
- ▶  Root Questions - Application
- ▶  Individual Demographics
- ▶  Household Status
- ▶  Relationships
- ▶  Citizenship
- ▶  Pregnancy
- ▶  Residency
- ▶  Other Program Assistance

### Group's Rules

Condition(s)

[Edit Condition](#) | [Clear Condition](#)

- The answer of question #1 (Is the RE date correct?) is "Y"

AND

- The answer of question #2 (Was the correct beginning date of aid determined?) is "Y"

• **Conditional Rules**

If the answer of the question

is

---

If the answer of the question

is

---

If the answer of the question

is

---

Consequence

The group "Case Summary" will be disable and all of the questions in this group will be answered as "NA"

Page Control:

Label	Type	Source	Remarks
Edit Condition	Link		This link is only available when there are no conditional rules been set.  OnClick: display the first Conditional Rule editor

			<p>◦ <b>Conditional Rules</b></p> <p>If the answer of the question</p> <p>-- Select a question --</p> <p>is -- Select an answer --</p> <p>Add</p>
Conditional Question	Dropdown list	[Question](Questions above the selected group)	
Conditional Question's answer	Dropdown list	[Answer]-[Question]	Based on the selection of the above question dropdown list box, this answer list box will be populated accordingly.
Rule Connection Operator	Dropdown list	AND & OR	<p>◦ <b>Conditional Rules</b></p> <p>If the answer of the question</p> <p>Q1 - Is the RE date correct?</p> <p>is Y</p> <p>AND Update Delete</p> <p>-----</p> <p>If the answer of the question</p> <p>-- Select a question --</p> <p>is -- Select an answer --</p> <p>Add</p>
Add	Button		OnClick: save the rule to the [ConditionRule] table and display the new set of Rule editor.

			<p><input type="checkbox"/> Condition(s)</p> <p>Edit Condition   Clear Condition</p> <ul style="list-style-type: none"> <li>The answer of question #1 (Is the RE date correct?) is "Y"</li> </ul> <p>• Conditional Rules</p> <p>If the answer of the question</p> <p>Q1 - Is the RE date correct?</p> <p>is Y</p> <p>AND Update Delete</p> <p>-----</p> <p>If the answer of the question</p> <p>-- Select a question --</p> <p>is -- Select an answer --</p> <p>ADD</p> <p>After displaying the new Rule Editor, user can edit or delete the created rule.</p>
Condition narrator	label		<p>Based on the contents of the conditional rules, the system will dynamically build the description of the conditional rules in English.</p> <p>Example:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The answer of question #1 (Is the RE date correct?) is "Y" AND</li> <li><input type="checkbox"/> The answer of question #2 (Was the correct beginning date of aid determined?) is "Y"</li> </ul>
Consequence		[GroupCondition].GroupID	The consequence section will display the following message: "The group "{selected Question's group}" will be disabled and all of the questions in this group will be answered as "NA".
Submit	Button	[Condition] & GroupCondition & [ConditionRule]	OnClick: save the above data to the database ([SkipLogicCondition] & [ConditionGroup] & [ConditionRule])
Cancel	Button		OnClick: re-direct to questionnaire builder page



## Question Conditions page (Admin/QuestionCondition.aspx)

Page Description: This page provides the functionality to construct the conditions to automatically set an answer for a question.

Page Name: Admin/QuestionConditions.aspx.

Page Layout:

▼  Tier I Review

- ▶  New Question
- ▶  New Group
- ▼  Case Summary
  - ▶  Q1
  - ▶  Q2
  - ▶  Q3
  - ▶  Q4
- ▶  Case Contact
- ▶  Root Questions - Application
- ▶  Individual Demographics
- ▶  Household Status
- ▶  Relationships
- ▶  Citizenship
- ▶  Pregnancy
- ▶  Residency
- ▶  Other Program Assistance

### Question's Rules

Condition(s)

Edit Condition | Clear Condition

- The answer of question #1 (Is the RE date correct?) is "Y"

AND

- The answer of question #2 (Was the correct beginning date of aid determined?) is "Y"

• **Conditional Rules**

If the answer of the question

Q1 - Is the RE date correct?

is

-----

If the answer of the question

Q2 - Was the correct beginning date of aid determined?

is

-----

If the answer of the question

-- Select a question --

is -- Select an answer --

---

Consequence

Question 4 - If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?

Answer will be set to:

Page Control:

Label	Type	Source	Remarks
Edit Condition	Link		<p>This link is only available when there are no conditional rules been set.                      OnClick: display the first Conditional Rule editor</p> <ul style="list-style-type: none"> <li>Conditional Rules</li> </ul> <p>If the answer of the question</p> <div style="border: 1px solid black; padding: 2px;">             -- Select a question --         </div> <p>is</p> <div style="border: 1px solid black; padding: 2px;">             -- Select an answer --         </div> <p><input type="button" value="Add"/></p>
Conditional Question	Dropdown list	[Question](Questions above the selected group)	
Conditional Question's answer	Dropdown list	[Answer] - [Question]	Based on the selection of the above question dropdown list box, this answer list box will be populated accordingly.
Rule Connection Operator	Dropdown list	AND & OR	<ul style="list-style-type: none"> <li>Conditional Rules</li> </ul> <p>If the answer of the question</p> <div style="border: 1px solid black; padding: 2px;">             Q1 - Is the RE date correct?         </div> <p>is</p> <div style="border: 1px solid black; padding: 2px;">             V         </div> <p> <input type="button" value="AND"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> </p> <p>-----</p> <p>If the answer of the question</p> <div style="border: 1px solid black; padding: 2px;">             -- Select a question --         </div> <p>is</p> <div style="border: 1px solid black; padding: 2px;">             -- Select an answer --         </div> <p><input type="button" value="Add"/></p>
Add	Button		OnClick: save the rule to the [ConditionRule] table and display the new set of Rule editor.

			<p><input type="checkbox"/> Condition(s)</p> <p>Edit Condition   Clear Condition</p> <ul style="list-style-type: none"> <li>The answer of question #1 (Is the RE date correct?) is "Y"</li> </ul> <p>◦ Conditional Rules</p> <p>If the answer of the question</p> <p>Q1 - Is the RE date correct?</p> <p>is Y</p> <p>AND Update Delete</p> <p>-----</p> <p>If the answer of the question</p> <p>-- Select a question --</p> <p>is -- Select an answer --</p> <p>AND</p> <p>After displaying the new Rule Editor, user can edit or delete the created rule.</p>
Consequence	Drop Down List	[QuestionCondition]. SetAnswerID	This control lists all of the answer options available for the selected question.
Condition narrator	label		Based on the contents of the conditional rules, the system will dynamically build the description of the conditional rules in English. Example: <input type="checkbox"/> The answer of question #1 (Is the RE date correct?) is "Y" AND <input type="checkbox"/> The answer of question #2 (Was the correct beginning date of aid determined?) is "Y"
Submit	Button	[QuestionCondition] & [ConditionRule]	OnClick: save the above data to the database ([SkipLogicCondition] & [ConditionGroup] & [ConditionRule])
Cancel	Button		OnClick: re-direct to questionnaire builder page

User Administration Page (Admin/AdminUser.aspx)

Page Description: This page provides the abilities to manage the case workers information.

Page Name: Admin/QuestionConditions.aspx.

Page Layout:

The screenshot shows a web application interface for user administration. On the left, there is a 'User Search' section with three input fields: 'Worker Number', 'County Employee #', and 'Last Name'. Below these fields are a 'Search' button and a link for 'Add new user'. On the right, the 'User Administration' section displays a 'Search Results' table. The table has four columns: 'Employee #', 'Name', 'File Number', and 'Worker Status'. The 'Employee #', 'Name', and 'File Number' columns contain placeholder images (checkered patterns), while the 'Worker Status' column lists 'Regular' for five entries. The 'File Number' column contains the value '36LS01' for all five entries.

Label	Type	Source	Remarks
User Search	Web user control		This web user control provides a search form to lookup for the user by worker number (file number), county employee # or last name.
Worker Number	Textbox	Validation required: (ex: worker 36AS16230C)	
		Order	Name
		Sample	Validation
		First 2	SB County
		36	yes
		Next 2	Worker type
		LS	yes
		Next 2	District
		16	Number only. Based on active Dis in the maintenance table
		Next 2	Unit
		23	Number only.
		Next 2	Position
		0C	Alpha Numerical only.

County Employ ee #	Textbox		Validation required: 5 Characters
Last Name	Textbox		
Search Result	Gridview	Person - Workernum ber - ConfCaseP ullGroup	This gridview displays the user list based on the searching criteria.
Employ ee #	Gridview column	Person.Us erID	
Name	Gridview column - Link	Person	OnClick: open the Case Review User Page and pass the employee # as a parameter (CRUser.aspx?emp={EmployeeNumber})
File Number	Gridview column	Person - Workernum ber	The latest worker number (file number) of the user
Worker status	Gridview column	Person - Workernum ber - ConfCaseP ullGroup	

### User Administration Page (Admin/AdminUser.aspx)

Page Description: This page provides the abilities to manage the case workers' information.

Page Name: Admin/QuestionConditions.aspx.

Page Layout:

**User Search**

Worker Number:

County Employee #:

Last Name:

**User Information**

Employee Number:

Name (FN MN LN):

Email:

Position:

Phone:

Supervisor:  Yes or Who is your supervisor

District manager:  Yes or Who is your district manager

Active?:

**Worker Numbers Assigned**

File Number	District	Start date	End date	Updated On	Updated By
36LS01	01	06/03/2007		06/03/2007 8:42:45 AM	Ct
36LS01	01	05/03/2006	06/03/2007	05/03/2006 8:42:45 AM	Sy

Label	Type	Source	Remarks		
User Search	Web user control		This web user control provides a search form to lookup for the user by worker number (file number), county employee # or last name.		
Worker Number	Textbox	Validation required: (ex: worker 36AS16230C)			
		Order	Name	Sample	Validation
		First 2	SB County	36	yes
		Next 2	Worker type	LS	yes
		Next 2	District	16	Number only. Based on active District table in the maintenance table
		Next 2	Unit	23	Number only
County Employee #	Textbox		Validation required: 5 Characters		

Last Name	Textbox		
User Information	Web user control		
Employee #	Textbox	Person.UserID	Validation required: 5 Characters
Name (FN MN LN)	3 Textboxes	Person	
Email	Textbox		Validation required: email format
Position	Dropdown list	refPosition	
Phone number	Textbox		Validation required: phone number format
Yes (Supervisor)	Checkbox	Person.IsSupervisor	
Supervisor	Dropdown list	Person	
Yes (District Manager)	Checkbox	Person.IsDistrictManager	
District Manager	Dropdown list	Person	
Active	Checkbox		
Worker Number Assigned	Gridview		
File number	Gridview column - link		OnClick: open a popup modal to allow user to manually modify the worker number assignment information.

			<div style="border: 1px solid black; padding: 5px;"> <p><b>Worker Number Assigned</b></p> <p>Fine Number <input type="text" value="36LS01E"/></p> <p>District <input type="text" value="01"/></p> <p>Start Date <input type="text" value="06/03/2007"/></p> <p>End Date <input type="text"/></p> <p><input type="button" value="Submit"/> <input type="button" value="Close"/></p> </div>																								
File Number	textbox	Validation required: (ex: worker 36AS16230C)																									
		<table border="1"> <thead> <tr> <th>Order</th> <th>Name</th> <th>Sample</th> <th>Validation</th> </tr> </thead> <tbody> <tr> <td>First 2</td> <td>SB County</td> <td>36</td> <td>yes</td> </tr> <tr> <td>Next 2</td> <td>Worker type</td> <td>LS</td> <td>yes</td> </tr> <tr> <td>Next 2</td> <td>District</td> <td>16</td> <td>Number only. Based on active District table in the maintenance table.</td> </tr> <tr> <td>Next 2</td> <td>Unit</td> <td>23</td> <td>Number only</td> </tr> <tr> <td>Next 2</td> <td>Position</td> <td>0C</td> <td>Alpha Numerical only</td> </tr> </tbody> </table>	Order	Name	Sample	Validation	First 2	SB County	36	yes	Next 2	Worker type	LS	yes	Next 2	District	16	Number only. Based on active District table in the maintenance table.	Next 2	Unit	23	Number only	Next 2	Position	0C	Alpha Numerical only	
Order	Name	Sample	Validation																								
First 2	SB County	36	yes																								
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Next 2	Unit	23	Number only																								
Next 2	Position	0C	Alpha Numerical only																								
District	Label	(File number)																									
Start Date	textbox		Validation required: <ul style="list-style-type: none"> <li>• Date format</li> <li>• Less than or equal to End date</li> </ul>																								
End Date	textbox		Validation required: <ul style="list-style-type: none"> <li>• Date format</li> <li>• Greater than or equal to Start date</li> </ul>																								
Submit	Button		OnClick: save the above information and validate the input data. <ul style="list-style-type: none"> <li>• No file number can be assigned to more than 1 case worker in the same date range.</li> <li>• The Start Date of the later assignment cannot be smaller than the End Date of the assignment.</li> </ul>																								
Close	Button		OnClick: close popup modal																								
District	Gridview column																										
Start Date	Gridview column																										



End Date	Gridview column		
Update On	Gridview column		
Update By	Gridview column		

APPENDIX C  
REPORT SPECIFICATIONS

## REPORT SPECIFICATIONS

### Report #1: Discrepancy found by Re-Reviewer Detail

Objective: This report will be showing the list of discrepancy for all cases that a re-reviewer found after he/she reviewed according to selected region, district and month.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Re-Reviewer from the Report Group list	Report Selection
3	Select Discrepancy found by Re-Reviewer Detail from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box	Filter Selection
6	Select District from the District list box	Filter Selection
7	Select the Re-Reviewer from the Re-Reviewer list box	Filter Selection
8	Press the Get Report button	Filter Selection

Sample Report layout:

Rpt 1 Discrepancy found by Re-Reviewer Detail.doc		Page 1 of 2
<b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>
<b>Discrepancy found by Re-Reviewer Detail</b>		
		<b>Medi-Cal</b>
Re-Reviewer: A22 [REDACTED]		<b>Review Month: June 2008</b>
		<b>Region 1 District 3</b>
<b>Case #</b>	<b>Question #</b>	<b>Question in Error</b>
MC 458 [REDACTED]	5	Is the correct address entered for each MFBU member?
MC 123 [REDACTED]	11	Were correct procedures followed for any retroactive Medi-Cal request?
MC 327 [REDACTED]	20	If Minor Consent, is there a current and correctly completed MC4026 in case record?
MC 075 [REDACTED]	2	Was the correct beginning date of aid determined?
MC 558 [REDACTED]	8	Is there a current MC219 or Journal entry addressing it in case record?

Rpt 1 Discrepancy found by Re-Reviewer Detail.doc		Page 2 of 2
<b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>
<b>Discrepancy found by Re-Reviewer Detail</b>		
		<b>Medi-Cal</b>
Re-Reviewer: A11 [REDACTED]		<b>Review Month: June 2008</b>
		<b>Region 1 District 4</b>
<b>Case #</b>	<b>Question #</b>	<b>Question in Error</b>
MC 458 [REDACTED]	5	Is the correct address entered for each MFBU member?
MC 123 [REDACTED]	11	Were correct procedures followed for any retroactive Medi-Cal request?
MC 327 [REDACTED]	20	If Minor Consent, is there a current and correctly completed MC4026 in case record?
MC 075 [REDACTED]	2	Was the correct beginning date of aid determined?
MC 558 [REDACTED]	8	Is there a current MC219 or Journal entry addressing it in case record?

Create a count for any particular discrepancies question:

The sum of all discrepancies found from all the review questions for a particular re-reviewer. It should be listed at the end of each re-reviewer section. Ex: The Re-reviewer #1, John Doe, found 7 errors in question # 5 and found 2 errors in the different question (ex: question # 7) from all the review cases.

- The discrepancies for question # 5: 7
- The discrepancies for question # 7: 2

Create a count for a particular discrepancies question:

The total count of all discrepancies found in the case-question regarding to only one review question. Ex: if this report shows only 2 re-reviewers. The re-reviewer #1 Adam Apple found 2 errors and re-reviewer #2 Alex Casanova found 4 errors after they reviewed the question # 5 in their cases. Then the sum of discrepancies for the question # 5 is 6.

**Report # 2: Top 5 Discrepancy found by Re-Reviewer Error Trend**

Objective:

This report will be showing the list of top 5 discrepancies for all review questions that a re-reviewer found after he/she reviewed all review cases based on selected region, district and month.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Other from the Report Group list	Report Selection
3	Select Discrepancy found by Re-Reviewer Detail from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box	Filter Selection
6	Select District from the District list box	Filter Selection

7	Select the Re-Reviewer from the Re-Reviewer list box	Filter Selection
8	Press the Get Report button	Filter Selection

Sample Report Layout:

Rpt 2 Top 5 Discrepancy found by Re-Reviewer Error Trend.doc		Page 1 of 2		
San Bernardino County Human Services		Transitional Assistance Department		
Top 5 Discrepancy found by Re-Reviewer Error Trend		Medi-Cal		
Re-Reviewer: A155 [REDACTED] Region 1 District 3		Review Month: June 2008		
Question Number	Question	#Cases Reviewed with this question	# of cases with this question in error	# of Discrepancies
25	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	20	2	1
Re-Reviewer Total		Total # of Questions In Error	Total # of Discrepancies	
		25	1	

Create a count for total questions in error per re-reviewer: The total sum of all errors found by each re-reviewer.

Create a count for total discrepancies per re-reviewer: The total sum of all discrepancies found by each re-reviewer.

Create a count for total questions in error for all re-reviewers: The total sum of all errors found from the review question(s) in all review cases for all re-reviewers.

In this above example is 40

Create a count for total discrepancies for all re-reviewers: the number of discrepancies between the re-reviewer and reviewer is 13.

### Report # 3: Reviewer Proficiency.

Objective:

This report will be showing the list of the proficiency for a selected district in the chosen region.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Other from the Report Group list	Report Selection
3	Select Reviewer Proficiency from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box	Filter Selection
6	Select District from the District list box	Filter Selection
7	Select the Reviewer from the Reviewer list box	Filter Selection
8	Press the Get Report button	Filter Selection

Sample Report Layout:

Rpt3 Reviewer Proficiency.doc						Page 1 of 2
San Bernardino County Human Services				Transitional Assistance Department		
Reviewer Proficiency				Medi-Cal		
				Review Month: June 2008		
Reviewer: ██████████				Region 1 District 5		
Number of Cases Read	Review Name	Number of Errors Cited	Number of Errors Removed	Number of Correct	Number of NA	Total % Correct
4	continue	0	0	0	0	0
9	intake	9	0	167	288	100.00
Reviewer: ██████████				Region 1 District 5		
Number of Cases Read	Review Name	Number of Errors Cited	Number of Errors Removed	Number of Correct	Number of NA	Total % Correct
5	continue	0	0	0	0	0
16	intake	37	0	187	474	100.00
Reviewer: ██████████				Region 1 District 5		
Number of Cases Read	Review Name	Number of Errors Cited	Number of Errors Removed	Number of Correct	Number of NA	Total % Correct
5	continue	0	0	0	0	0
6	intake	12	0	119	174	100
Reviewer: ██████████				Region 1 District 5		
Number of Cases Read	Review Name	Number of Errors Cited	Number of Errors Removed	Number of Correct	Number of NA	Total % Correct
12	continue	0	0	0	0	0
11	intake	10	5	5	0	9

Notes:

Total % of correct in this above example was calculated by using the following formula:

$$\frac{(\# \text{ of Errors Cited}) - (\# \text{ of Errors Removed})}{(\# \text{ of Errors Cited})} * 100\%$$

Use the above sample, select Akenzua Omogeric (reviewer) to demonstrate our calculation. Select **Intake** for Review Name as a sample, we will



have 9 for Number of Errors Cited and 0 for Number of Errors Removed. The answer is  $(9-0) = 9$  and then take 9 divides to 9 and the answer is 1. Time 1 to  $100\% = 100\%$ . The 100% is listing in the column Total % Correct.

Procedure error will not count as an error. Only Hard error will count. If there are two types of errors, use the hard error, not both.

#### Report # 4: Incomplete reviews By Reviewer

##### Objective:

This report will be showing the list of the incomplete review cases by reviewer, district, region and county. Incomplete case is the case that is still in the Review Progress.

##### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Other from the Report Group list	Report Selection
3	Select Incomplete reviews By Reviewer from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box	Filter Selection
6	Select District from the District list box (Either by particular or by all)	Filter Selection
7	Select the Reviewer from the Reviewer list box	Filter Selection
8	Press the Get Report button	Filter Selection

##### Sample Report layout:

**San Bernardino County Human Services**  
**Incomplete reviews By Reviewer**

**Transitional Assistance Department**

**Medi-Cal**

**Review Month: June 2008**

**Region 1**

**District 01**

Case #	Case Name	Case File #	Supervisor ID
<b>Reviewer: R21</b>			
MC 216		0236LS02	B4
MC 116		0236LS02	R2
Total number of incomplete cases by Reviewer			2
<b>Reviewer: R21</b>			
MC 116		0236LS02	R2
Total number of incomplete cases by Reviewer			1
Total number of incomplete cases by District 01:			3

**District 02**

<b>Reviewer: M01</b>			
MC 208		7936LS79D	M0
Total number of incomplete cases by Reviewer			1
Total number of incomplete cases for District 02:			1
Total number of incomplete cases for Region 1:			4

**San Bernardino County Human Services**

**Transitional Assistance Department**

**Incomplete reviews By Reviewer**

**Medi-Cal**

**Review Month: June 2008**

**Region 5**

**District 09**

Case #	Case Name	Case File #	Supervisor ID
<b>Reviewer: W02</b>			
MC216		0236LS02	W0
MC116		0236LS02	W0
MC145		0936LS09	W0
Total number of incomplete cases by Reviewer			3
Total number of incomplete cases by District 09:			3
Total number of incomplete cases by Region 5:			3
Total number of incomplete cases:			7

**Notes:**

Total number of incomplete cases by [Worker Name] is the total count of number of incomplete cases that selected reviewer has reviewing. In this example, the number is 2 for worker Robles, Lori in the district 01 in the region 1.

Total number of incomplete cases by [District Name] is the sum of incomplete cases in a district. In this example in page 2, the number is 3 for the district 09 in the region 5.

Total number of incomplete cases by [Region Name] is the sum of incomplete cases in all districts in the same region. In this example in page 2, the number is 3 in the region 5.

Total number of incomplete cases is the sum of incomplete cases that selected reviewers in the county. In this example in page 2, the number is 7.

### Report # 5: Incomplete re-reviews By Re-Reviewer

Objective:

This report will be showing the list of the incomplete review cases by re-reviewer, district, region and county. Incomplete case is the case that is in the Review Progress.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Other from the Report Group list	Report Selection
3	Select Incomplete re-reviews By Re-Reviewer from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box (Either by particular or by all regions)	Filter Selection
6	Select District from the District list box (Either by particular or by all districts)	Filter Selection
7	Select the Reviewer from the Re-Reviewer list box	Filter Selection
8	Press the Get Report button	Filter Selection

Sample Report layout:

**San Bernardino County Human Services**  
**Incomplete re-reviews By Re-Reviewer**

**Transitional Assistance Department**

Medi-Cal

Review Month: June 2008

Region 1

District 01

Case #	Case Name	Case File #	Supervisor ID
<b>Re-Reviewer: R21</b>			
MC 2166		0236L502C	B4
MC 1166		0236L502C	R2
Total number of incomplete cases by Re-Reviewer			2

<b>Re-Reviewer: R21</b>			
MC 1891		3458L509C	R8
Total number of incomplete cases by Re-Reviewer			1

Total number of incomplete cases by District 01:			3
--	--	--	---

District 02

<b>Re-Reviewer: M01</b>			
MC 2081		7936L579C	M0
Total number of incomplete cases by Re-Reviewer			1

Total number of incomplete cases for District 02:			1
---	--	--	---

Total number of incomplete cases for Region 1:			4
--	--	--	---

Report 5 (continued)

Rpt 5 Incomplete re-reviews By Re-Reviewer.doc		Page 2 of 2	
San Bernardino County Human Services		Transitional Assistance Department	
Incomplete re-reviews By Re-Reviewer		Medi-Cal	
Region 5		Review Month: June 2008	
District 09			
Case #	Case Name	Case File #	Supervisor ID
Re-Reviewer: W02			
MC 2166		0236LS02C	WC
MC 1169		0236LS02C	WC
MC 1456		0936LS094	WC
Total number of incomplete cases by Re-Reviewer:		3	
Total number of incomplete cases by District 09:		3	
Total number of incomplete cases by Region 5:		3	
Total number of incomplete cases:		7	

Notes:

Total number of incomplete cases by particular District [District's name] is the sum of incomplete cases by all re-reviewers in the same district.

Total number of incomplete cases by particular Region [Region's name] is the sum of incomplete cases by all re-reviewers in the same region.

Total number of incomplete cases is the sum of incomplete cases by all re-reviewers in all regions.

## Report # 6: Completed Counts by Reviewer

### Objective:

This report will be showing the list of the completed review case counts based on employee number (reviewer's name). Completed count is the total count of review cases had been done by reviewer or when the case has the complete status.

### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Other from the Report Group list	Report Selection
3	Select Completed Counts By Reviewer from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box (Either by particular or by all regions)	Filter Selection
6	Select District from the District list box (Either by particular or by all districts)	Filter Selection
7	Press the Get Report button	Filter Selection

Sample Report layout:

Rpt 6 Completed Counts By Reviewer.doc		Page 1 of 2		
San Bernardino County Human Services		Transitional Assistance Department		
Completed Counts By Reviewer		Medi-Cal		
		Review Month: June 2008		
Region 1				
District 01				
Emp. #	Reviewer Name	Intake	Cont.	Completed Counts
F1		9	6	15
G2		3	6	9
Total number of complete cases by District 01:		12	12	24
District 02				
F1		8	7	15
G4		3	6	9
G3		6	3	9
Total number of complete cases by District 02:		17	16	33
Total number of complete cases by Region 1:		29	28	57

Rpt 6 Completed Counts By Reviewer.doc		Page 2 of 2		
San Bernardino County Human Services		Transitional Assistance Department		
Completed Counts By Reviewer		Medi-Cal		
		Review Month: June 2008		
Region 5				
District 09				
Emp. #	Reviewer Name	Intake	Cont.	Completed Counts
F1		7	8	15
G2		6	3	9
Total number of complete cases by District 09:		13	11	24
Total number of complete cases by Region 5:		13	11	24
Total number of complete cases:		42	39	81



Notes:

Total number of complete counts by particular District [District's name] is the sum of cases (intake and continue) by all reviewers in the same district.

Total number of complete counts by particular Region [Region's name] is the sum of cases (intake and continue) by all reviewers in the same region.

Total number of complete counts is the sum of cases (intake and continue) by all reviewers in the county.

**Report # 7: Completed Counts By Re-Reviewer**

Objective:

This report will be showing the list of the completed counts by reviewer for a particular district from the selected region by re-reviewer.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Other from the Report Group list	Report Selection
3	Select Completed Counts By Re-Reviewer from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box (Either by particular or by all regions)	Filter Selection
6	Select District from the District list box (Either by particular or by all districts)	Filter Selection

Sample Report layout:

Rpt7 Completed Counts By Re-Reviewer.doc		Page 1 of 2		
<b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>		
<b>Completed Counts By Re-Reviewer</b>		<b>Medi-Cal</b>		
		<b>Review Month: June 2008</b>		
<b>Region 1</b>				
<b>District 01</b>				
<b>Emp. #</b>	<b>Reviewer Name</b>	<b>Intake</b>	<b>Cont.</b>	<b>Completed Counts</b>
F1		9	6	15
G2		3	6	9
Total number of complete cases by District 01:		12	12	24
<b>District 02</b>				
F1		8	7	15
G2		3	6	9
G:		6	3	9
Total number of complete cases by District 02:		17	16	33
Total number of complete cases by Region 1:		29	28	57

Rpt7 Completed Counts By Re-Reviewer.doc		Page 2 of 2		
<b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>		
<b>Completed Counts By Re-Reviewer</b>		<b>Medi-Cal</b>		
		<b>Review Month: June 2008</b>		
<b>Region 5</b>				
<b>District 09</b>				
<b>Employee #</b>	<b>Re-Reviewer Name</b>	<b>Completed Counts</b>		
F1		15		
G:		9		
Total number of completed cases by District 09:		24		
Total number of completed cases by Region 5:		24		
Total number of completed cases:		81		

Notes:

Total number of complete counts by particular District [District's name] is the sum of counts (intake and continue) by all reviewers in the same district.

Total number of complete counts by particular Region [Region's name] is the sum of counts (intake and continue) by all reviewers in the same region.

Total number of complete counts is the sum of cases (intake and continue) by all reviewers in the county.

**Report # 8: Delinquent Case Corrections**

Objective:

This report will be showing the list of the Delinquent Case Corrections based on a particular supervisor from a selected district, region and month. Delinquent Case Corrections is defined as case failed to meet the correction due date. The correction due date is setting by authorized users in the administration page. After reviewer reviews case, the correction due date will be automatically set a due date for any identified error(s) that are required to fix by worker. Worker will need to fix error(s) before the correction due date. Any case(s) fails to meet the correction due date will be listing in the report.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Re-review from the Report Group list	Report Selection

3	Select Delinquent Case Corrections from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box	Filter Selection
6	Select District from the District list box	Filter Selection
7	Select Supervisor from the Supervisor list box	Filter Selection
8	Press the Get Report button	Filter Selection

Sample Report layout:

**San Bernardino County Human Services**

**Transitional Assistance Department**

**Delinquent Case Corrections**

**Medi-Cal**

**Review Month: June 2008**

Case Name	Case #	File #	Due Date
<b>Supervisor: R2</b>	<b>Region 1 District 3</b>		
	MC 2166	0236LS02C	06/02/2008
	MC 1166	0236LS02C	06/05/2008
<b>Supervisor: M01</b>	<b>Region 1 District 3</b>		
	MC 1143	0236LS02C	06/05/2008
	MC 2335	0326LS021	06/07/2008
<b>Supervisor: M01</b>	<b>Region 3 District 9</b>		
	MC 1143	0236LS02C	06/05/2008
	MC 2335	0326LS021	06/07/2008
	MC 2166	0236LS02C	06/02/2008
	MC 1166	0236LS02C	06/05/2008
	MC 2166	0236LS02C	06/02/2008
<b>Supervisor: M02</b>	<b>Region 3 District 9</b>		
	MC 1143	0236LS02C	06/05/2008
	MC 2166	0236LS02C	06/02/2008
	MC 1166	0236LS02C	06/05/2008
	MC 1143	0236LS02C	06/05/2008
	MC 2335	0326LS021	06/07/2008
	MC 1143	0236LS02C	06/05/2008
	MC 2335	0326LS021	06/07/2008
	MC 2166	0236LS02C	06/02/2008
	MC 1166	0236LS02C	06/05/2008
	MC 2166	0236LS02C	06/02/2008
<b>Supervisor: T02</b>	<b>Region 3 District 9</b>		
	MC 2166	0236LS02C	06/02/2008

**San Bernardino County Human Services**

**Transitional Assistance Department**

**Delinquent Case Corrections**

**Medi-Cal**

**Review Month: June 2008**

Case Name	Case #	File #	Due Date
<b>Supervisor: R21</b>	<b>Region 5 District 39</b>		
	MC 2166	0236LS02C	06/02/2008
	MC 1166	0236LS02C	06/05/2008

Notes:

All cases must be sorted by Last Name first, First Name second, and last Middle Initial.

The report needs to list the case count by particular region at the end of each region section.

The report needs to list the case count by particular district at the end of each district section.

The report needs to list the case count by particular supervisor at the end of each supervisor section.

**Report # 9: Corrections Completed Detailed**

Objective:

This report will be showing the list of the cases that have total days have been taken to fix the error(s) based on case worker ID and review month. The day count is calculated by using how many days are needed for workers to fix error from the Completed date to Review date.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Re-review from the Report Group list	Report Selection
3	Select Corrections Completed Detailed from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box	Filter Selection

6	Select District from the District list box	Filter Selection
7	Press the Get Report button	Filter Selection

Sample Report layout:

Rpt 9 Corrections Completed Detailed Report.doc		Page 1 of 2			
<b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>			
<b>Corrections Completed Detail Report</b>		<b>Medi-Cal</b>			
		<b>Review Month: June 2008</b>			
		<b>Region 1</b>			
<b>District 01</b>					
	<b>Case Name</b>	<b>Case #</b>	<b>Review</b>	<b>Completed</b>	<b>Days</b>
<b>Case Worker ID 36LS01B</b>					
		2166	6/5/2008	6/9/2008	28
		1169	6/4/2008	6/10/2008	28
<b>Case Worker ID 36LS01B</b>					
		2088	6/5/2008	6/10/2008	27
<b>Case Worker ID 36LS01B</b>					
		2230	6/4/2008	6/5/2008	31
		2150	6/4/2008	6/4/2008	1
		2166	6/5/2008	6/9/2008	28
		1169	6/4/2008	6/10/2008	28
		2088	6/5/2008	6/10/2008	27
		2150	6/4/2008	6/4/2008	1
		2166	6/5/2008	6/9/2008	28
		2230	6/4/2008	6/5/2008	31
		2166	6/5/2008	6/9/2008	28
		1169	6/4/2008	6/10/2008	28
		2088	6/5/2008	6/10/2008	27
<b>Case Worker ID 36LS01B</b>					
		2218	6/4/2008	6/6/2008	30

Notes:

Days column: the day count is calculated by using how many days are needed for workers to fix error from the Completed date to Review date.

## Report # 10: Rebuttal Removed

### Objective:

The purpose of this report is to show who and when removed the rebuttal error(s) and the reason for removal based on month, region and district.

### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Re-review from the Report Group list	Report Selection
3	Select Rebuttal Removed from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from the Region list box	Filter Selection
6	Select District from the District list box	Filter Selection
7	Press the Get Report button	Filter Selection

### Sample Report layout:

Rpt 10 Rebuttal Removed Report.doc						Page 1 of 1	
San Bernardino County Human Services				Transitional Assistance Department			
Rebuttal Removed Report				Medi-Cal			
						Review Month: June 2008	
CaseName	Case #	File #	Q.#	Who Removed	Date Removed	Why	Hard Error
Reviewer: C1111				Region 1 District 3			
	216	1036LS10	3		06/15/08	Supervisor hit the wrong button.	<input type="checkbox"/>
	116	1036LS10	41		06/22/08	Error by Supervisor	<input type="checkbox"/>
	208	1036LS10	42		06/23/08	Supervisor hit the wrong button.	<input type="checkbox"/>



## Report # 11: Case Review Summary

### Objective:

To list of all review cases by selected month, region and district.

### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Re-review from the Report Group list	Report Selection
3	Select Case Review Summary from Report list box	Report Selection
4	Select month from "From" list box	Filter Selection
5	Select month from "To" list box	Filter Selection
6	Select Region from the Region list box	Filter Selection
7	Select District from the District list box	Filter Selection
8	Press the Get Report button	Filter Selection

Sample Report layout:

Rpt 11 Case Review Summary Report.doc		Page 1 of 2			
San Bernardino County Human Services		Transitional Assistance Department			
Case Review Summary Report		Medi-Cal			
File #	Case Number	From May 2008 Total	To June 2008 Tier I	Re-Review	Intake
District 02					
1036LS10	158	1	1	0	0
1036LS10	215	1	1	0	0
1036LS10	158	2	1	1	0
1036LS10	215	1	0	0	1
1036LS10	158	1	0	0	1
1036LS10	200	2	0	1	1
1036LS10	215	1	1	0	0
1036LS10	215	1	1	0	0
1036LS10	158	1	0	0	1
1036LS10	158	1	0	0	1
1036LS10	200	2	0	1	1
1036LS10	215	1	1	0	0
1036LS10	215	1	1	0	0
1036LS10	158	1	0	0	1
1036LS10	200	2	0	1	1
1036LS10	215	1	1	0	0
1036LS10	200	2	1	1	0
Total		22	9	5	8

Notes:

This report has the From and To in the selected filters, it is making sure that the From Month list box is before To Month list box.

## Report # 12; County by Region Detail

### Objective:

To report the detail report by all regions in the county, the following information will be available in the report:

- Region Name
- Number of cases was reviewed
- Number of cases with hard errors
- Percentage proficiency for hard errors
- Number of cases with procedural errors
- Percentage proficiency for procedural errors
- Total numbers of cases with errors

### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Detail from the Report Group list	Report Selection
3	Select County By Region Detail from Report list box	Report Selection
4	Select month from Month list box	Filter Selection
5	Press the Get Report button,	Filter Selection

### Sample Report layout:



## Report # 13: District by Supervisor

### Objective:

The detail report will show all districts from a particular region with following information:

- Supervisor's name
- Number of cases was reviewed
- Number of cases with hard errors
- Percentage proficiency for hard errors
- Number of cases with procedural errors
- Percentage proficiency for procedural errors
- Total numbers of cases with errors

### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Detail from the Report Group list	Report Selection
3	Select District By Supervisor Detail from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from Region list box	Filter Selection
6	Select District from District list box	Filter Selection
7	Press the Get Report button	Filter Selection

### Sample Report layout:

Review Month: June 2008

Region 1						
District 01	#Cases Reviewed	Cases with Hard Errors	Proficiency Hard Errors <sup>1</sup> %	Cases with Procedural Errors	Proficiency Procedural Errors <sup>2</sup> %	Total Number of Cases with Errors <sup>3</sup>
Supervisor: A12	80	3	96.2%	3	96.2%	6
Supervisor: B12	78	1	98.7%	2	97.4%	3
Supervisor: C12	64	2	96.8%	7	89.0%	9
Supervisor: D12	68	0	100%	0	100%	0
<b>District Total</b>	<b>290</b>	<b>6</b>	<b>97.9%</b>	<b>12</b>	<b>95.8%</b>	<b>18</b>

Notes

<sup>1</sup> Column is calculated:  $(\#Cases\ Reviewed - Cases\ with\ Hard\ Errors) / \#Cases\ Reviewed * 100$

<sup>2</sup> Column is calculated:  $(\#Cases\ Reviewed - Cases\ with\ Procedural\ Errors) / \#Cases\ Reviewed * 100$

<sup>3</sup> Column is calculated:  $Cases\ with\ Hard\ Errors + Cases\ with\ Procedural\ Errors$

Report # 14: Region by District

Objective:

The detail report will show all regions with detail information by each district with following information:

- Region name
- District name
- Number of cases was reviewed
- Number of cases with hard errors
- Percentage proficiency for hard errors
- Number of cases with procedural errors
- Percentage proficiency for procedural errors
- Total numbers of Cases with errors

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Detail from the Report Group list	Report Selection
3	Select Region By District from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from Region list box	Filter Selection
6	Press the Get Report button	Filter Selection

Sample Report layout:

Report # 14

**San Bernardino County Human Services**  
Region by District Detail Report

**Transitional Assistance Department**  
**Medi-Cal**

Review Month: June 2008

Region 1

	#Cases Reviewed	Cases with Hard Errors	Proficiency Hard Errors <sup>1</sup> %	Cases with Procedural Errors	Proficiency Procedural Errors <sup>2</sup> %	Total Number of Cases with Errors <sup>3</sup>
District 01	725	50	93.1%	70	90.3%	120
District 02	450	17	96.2%	10	97.7%	27
District 03	212	9	95.7%	7	95.6%	16
District 04	76	2	97.3%	7	90.7%	9
Region Total	1463	78	94.6%	94	93.5%	172

Report # 14

**San Bernardino County Human Services**  
Region by District Detail Report

**Transitional Assistance Department**  
**Medi-Cal**

Review Month: June 2008

Region 2

	#Cases Reviewed	Cases with Hard Errors	Proficiency Hard Errors <sup>1</sup> %	Cases with Procedural Errors	Proficiency Procedural Errors <sup>2</sup> %	Total Number of Cases with Errors <sup>3</sup>
District 07	725	50	93.1%	70	90.3%	120
District 15	450	17	96.2%	10	97.7%	27
District 25	212	9	95.7%	7	95.6%	16
Region Total	1397	76	94.5%	87	93.7%	163
County Total	6101	662	89.1%	800	86.8%	1462



## Notes

<sup>1</sup> Column is calculated:  $(\#Cases\ Reviewed - Cases\ with\ Hard\ Errors) / \#Cases\ Reviewed * 100$

<sup>2</sup> Column is calculated:  $(\#Cases\ Reviewed - Cases\ with\ Procedural\ Errors) / \#Cases\ Reviewed * 100$

<sup>3</sup> Column is calculated:  $Cases\ with\ Hard\ Errors + Cases\ with\ Procedural\ Errors$

### Report # 15: Supervisor by Worker

#### Objective:

This report is using to show how workers perform in their cases from the selected district.

#### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Detail from the Report Group list	Report Selection
3	Select Supervisor by Worker from Report list box	Report Selection
4	Select Month from Month list box	Filter Selection
5	Select Region from Region list box	Filter Selection
6	Select District from District list box	Filter Selection
7	Select Supervisor from Supervisor list box (optional: all or specific sup.)	Filter Selection
8	Press the Get Report button	Filter Selection



<sup>3</sup> Column is calculated: Cases with Hard Errors + Cases with Procedural Errors

Report # 16: Worker by Question (Group by Date)

Objective:

This report will list the error case(s) with the error question number and type of error based on the review month(s), supervisor and worker. The report is sorting by the date.

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Detail from the Report Group list	Report Selection
3	Select Worker by Question (Group by Date) from Report list box	Report Selection
4	Select Month from "From" list box	Filter Selection
5	Select Month from "To" list box	Filter Selection
6	Select Region from Region list box	Filter Selection
7	Select District from District list box	Filter Selection
8	Select Supervisor from Supervisor list box (option: all or specific supervisor)	Filter Selection
9	Select Worker from Worker list box (option: all or specific Worker)	Filter Selection
10	Press the Get Report button	Filter Selection

Sample Report layout:

District 01

Review Month: March 2008 - June 2008

Supervisor: A12

Worker: U12

Month	Case #	Question #	Error Type	Question in Error
March 2008	123	4	H	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?
	523	4	P	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?
	342	6	P	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?
	897	20	P	If Minor Consent, is there a current and correctly completed MC4026 in case record?
April 2008	324	4	H	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?
	234	6	P	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?
	234	10	P	Is there a correctly reconciled IEVS 410 for all required person(s)?
May 2008	667	4	P	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?
	898	10	P	Is there a correctly reconciled IEVS 410 for all required person(s)?
June 2008	345	6	H	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?

<b>Total Number in Error</b>	<b>10</b>
------------------------------	-----------

□



District 01

Review Month: March 2008 - June 2008

Supervisor: A12

Worker: Y12

Month	Case #	Question #	Error Type	Question in Error
March 2008	458	2	H	Was the correct beginning date of aid determined?
	654	11	P	Were correct procedures followed for any retroactive Medi-Cal request?
	685	20	H	If Minor Consent, is there a current and correctly completed MC4026 in case record?
April 2008	123	2	H	Was the correct beginning date of aid determined?
	321	2	P	Was the correct beginning date of aid determined?
May 2008	327	5	H	Is the correct address entered for each MFBU member?
	989	8	P	Is there a current MC219 or Journal entry addressing it in case record?
	321	8	P	Is there a current MC219 or Journal entry addressing it in case record?
June 2008	075	5	H	Is the correct address entered for each MFBU member?
	798	8	P	Is there a current MC219 or Journal entry addressing it in case record?
	558	11	H	Were correct procedures followed for any retroactive Medi-Cal request?
<b>Total Number in Error</b>		<b>5</b>		
<b>Supervisor Total</b>		<b>80</b>		

Notes:

Total Number in Error is the sum of the question(s) has the error(s) either the type is hard or procedure. It should display by each worker and by each supervisor.

This report has the From and To in the selected filters, it is making sure that the From Month list box is before To Month list box.

## Report # 17: Worker by Question (Group by Question)

### Objective:

This report will list the error case(s) with the error question number and type of error based on the review month(s), supervisor and worker. The report is grouping all cases with the same error question.

### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Detail from the Report Group list	Report Selection
3	Select Worker by Question (Group by Question) from Report list box	Report Selection
4	Select Month from "From" list box	Filter Selection
5	Select Month from "To" list box	Filter Selection
6	Select Region from Region list box	Filter Selection
7	Select District from District list box	Filter Selection
8	Select Supervisor from Supervisor list box (option: all or specific supervisor)	Filter Selection
9	Select Worker from Worker list box (option: all or specific Worker)	Filter Selection
10	Press the Get Report button	Filter Selection

### Sample Report layout:

Report # 17

San Bernardino County Human Services

Transitional Assistance Department

Worker by Question Detail Report  
Group by Question

Medi-Cal

District 01

Review Month: March 2008 - June 2008

Supervisor: A12 [REDACTED]

Worker: U12 [REDACTED]

Question #	Case #	Error Type	Question in Error
4	1234	H	If the Medi-Cal Program Type is related to a waiver program, is the appropriate referral in the case record?
	5234	H	
	3423	P	
	8973	P	
6	3245	H	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?
	2347	P	
	2347	P	
10	6678	H	Is there a correctly reconciled IEVS 410 for all required person(s)?
	8987	P	
20	3457	H	If Minor Consent, is there a current and correctly completed MC4026 in case record?

Total Number in Error 10

Report # 17b		San Bernardino County Human Services		Transitional Assistance Department	
Worker by Question Detail Report				Medi-Cal	
Group by Question				Review Month: March 2008 - June 2008	
District 01					
Supervisor: A12					
Worker: Y12					
Question #	Case #	Error Type	Question in Error		
2	458	H	Was the correct beginning date of aid determined?		
	654	H			
	685	P			
5	123	H	Is the correct address entered for each MFBU member?		
	321	H			
8	327	P	Is there a current MC219 or Journal entry addressing it in case record?		
	989	P			
	321	P			
11	075	H	Were correct procedures followed for any retroactive Medi-Cal request?		
	798	P			
20	558	H	If Minor Consent, is there a current and correctly completed MC4026 in case record?		
Total Number in Error		5			
Supervisor Total		80			

Notes:

This report has the From and To in the selected filters, it is making sure that the From Month list box is before To Month list box.

All questions will be sorting by the ascending



## Report # 18: Top 5 Error Trend County

### Objective:

This report will list the total number of cases for county had been reviewed and what were the top 5 Error questions for a selected month(s).

### How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Top 5 Error Trend from the Report Group list	Report Selection
3	Select Top 5 Error Trend Report-County (Group by Question) from Report list box	Report Selection
4	Select Month from "From" list box	Filter Selection
5	Select Month from "To" list box	Filter Selection
6	Press the Get Report button	Filter Selection

### Sample Report layout:

Report #18 <b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>		
<b>County Trend Report</b>		<b>Medi-Cal</b>		
<b>Top 5 error questions</b>		<b>Review Month: March 2008 - June 2008</b>		
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
5	Is the correct address entered for each MFSU member?	1040	90	91.35%
11	Were correct procedures followed for any retroactive Medi-Cal request?	1040	80	92.31%
6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	1025	60	94.15%
2	Was the correct beginning date of aid determined?	510	40	92.16%
20	If Minor Consent, is there a current and correctly completed MC4026 in case record?	1030	35	96.61%
		<b>Total # of questions asked</b>	<b>Total # of questions in error</b>	<b>Proficiency of questions in error</b>
<b>County Totals</b>		48000	815	98.31%

Notes:

<sup>1</sup> Column is calculated: (#Cases read w/this question in error – #Cases with this question in Error) / #Cases read w/this question in error \* 100

Report # 19: Top 5 Error Trend District

Objective:

This report will list the total number of cases for a particular District had been reviewed and what were the top 5 error questions for a selected month(s).

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Top 5 Error Trend from the Report Group list	Report Selection

3	Select Top 5 Error Trend Report-District from Report list box	Report Selection
4	Select Month from "From" list box	Filter Selection
5	Select Month from "To" list box	Filter Selection
6	Select Region from Region list box(All or Select One)	Filter Selection
7	Select District from District list box (option select All or particular district)	Filter Selection
8	Press the Get Report button	Filter Selection

Sample Report layout:

Report # 19		San Bernardino County Human Services		Transitional Assistance Department	
District Trend Report				Medi-Cal	
Top 5 error questions				Review Month: March 2008 - June 2008	
District 01					
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>	
5	Is the correct address entered for each MFBU member?	80	5	93.75%	
11	Were correct procedures followed for any retroactive Medi-Cal request?	80	5	93.75%	
6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	70	4	94.29%	
2	Was the correct beginning date of aid determined?	70	4	94.29%	
20	If Minor Consent, Is there a current and correctly completed MC4026 in case record?	80	4	93.75%	
		Total # of questions asked	Total # of question in error	Proficiency of questions in error	
<b>District Totals</b>		3800	49	98.31%	

Report # 19 (cont)		Transitional Assistance Department		
San Bernardino County Human Services		Medi-Cal		
District Trend Report		Review Month: March 2008 - June 2008		
Top 5 error questions				
District 02				
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
5	Is the correct address entered for each MFBU member?	75	2	97.34%
11	Were correct procedures followed for any retro active Medi-Cal request?	75	2	97.34%
6	Is there a complete Statement of Facts (MC210, MC210RV, SAW52, etc)?	70	2	97.15%
2	Was the correct beginning date of aid determined?	70	2	97.15%
20	If Minor Consent, Is there a current and correctly completed MC4026 in case record?	75	1	98.66%
		<b>Total # of questions asked</b>	<b>Total # of question in error</b>	<b>Proficiency of questions in error</b>
<b>District Totals</b>		3100	60	98.07%

Notes:

<sup>1</sup> Column is calculated: (#Cases read w/this question in error – #Cases with this question in Error) / #Cases read w/this question in error \* 100

Report # 20: Top 5 Error Trend Region

Objective:

This report will list the total number of cases for a particular Region had been reviewed and what were the top 5 error questions for a selected month(s).

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Top 5 Error Trend from the Report Group list	Report Selection
3	Select Top 5 Error Trend Report-Region from Report list box	Report Selection

4	Select Month from "From" list box	Filter Selection
5	Select Month from "To" list box	Filter Selection
6	Select Region from Region list box (option select All or particular Region)	Filter Selection
7	Press the Get Report button	Filter Selection

Sample Report layout:

Report # 20				
<b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>		
<b>Region Trend Report</b>		<b>Medi-Cal</b>		
Top 5 error questions		Review Month: March 2008 - June 2008		
Region 1				
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
5	Is the correct address entered for each MFBU member?	1040	90	91.35%
11	Were correct procedures followed for any retroactive Medi-Cal request?	1040	80	92.31%
6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	1025	60	94.15%
2	Was the correct beginning date of aid determined?	510	40	92.16%
20	If Minor Consent, is there a current and correctly completed MC4026 in case record?	1030	35	96.61%
		<b>Total # of questions asked</b>	<b>Total # of question in error</b>	<b>Proficiency of questions in error</b>
<b>Region Totals</b>		4800	815	83.03%

Report #20 cont. San Bernardino County Human Services		Transitional Assistance Department		
Region Trend Report		Medi-Cal		
Top 5 error questions		Review Month: March 2008 - June 2008		
Region 2				
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
5	Is the correct address entered for each MFBU member?	1040	90	91.35%
11	Were correct procedures followed for any retroactive Medi-Cal request?	1040	80	92.31%
6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	1025	60	94.15%
2	Was the correct beginning date of aid determined?	510	40	92.16%
20	If Minor Consent, is there a current and correctly completed MC4026 in case record?	1030	35	96.61%
		Total # of questions asked	Total # of question in error	Proficiency of questions in error
Region Totals		4800	815	83.03%

Notes:

<sup>1</sup> Column is calculated:  $(\# \text{Cases read w/this question in error} - \# \text{Cases with this question in Error}) / \# \text{Cases read w/this question in error} * 100$

Report # 21: Top 5 Error Trend Supervisor

Objective:

This report will list the total number of cases for particular Supervisor had been reviewed and what were the top 5 error questions for a selected month(s).

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA
2	Select Top 5 Error Trend from the Report Group list	Report Selection
3	Select Top 5 Error Trend Report-Region from Report list box	Report Selection
4	Select Month from "From" list box	Filter Selection
5	Select Month from "To" list box	Filter Selection
6	Select Region from Region list box (option select All or particular Region)	Filter Selection
7	Select District from District list box (option select All or particular District)	Filter Selection
8	Select Supervisor from Supervisor list box (option select All or particular Supervisor)	Filter Selection
9	Press the Get Report button	Filter Selection

Sample Report layout:

Report # 21		Transitional Assistance Department		
San Bernardino County Human Services		Medi-Cal		
Supervisor Trend Report		Review Month: March 2008 - June 2008		
Top 5 error questions		District 01		
Supervisor: A12				
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
5	Is the correct address entered for each MFBU member?	80	5	93.75%
11	Were correct procedures followed for any retroactive Medi-Cal request?	80	5	93.75%
6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	70	5	92.8%
2	Was the correct beginning date of aid determined?	70	4	94.2%
20	If Minor Consent, is there a current and correctly completed MC4026 in case record?	80	4	95%
		Total # of questions asked	Total # of question in error	Proficiency of questions in error
<b>Supervisor Totals</b>		3800	50	98.68%

Report # 21 (cont)				
<b>San Bernardino County Human Services</b>		<b>Transitional Assistance Department</b>		
<b>Supervisor Trend Report</b>		<b>Medi-Cal</b>		
<b>Top 5 error questions</b>		<b>Review Month: March 2008 - June 2008</b>		
District 01				
Supervisor: B1: [REDACTED]				
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
5	Is the correct address entered for each MFBU member?	70	3	97.15%
11	Were correct procedures followed for any retroactive Medi-Cal request?	75	2	97.34%
6	Is there a complete Statement of Facts (MC210, MC210RV, SAW52, etc)?	75	2	97.15%
2	Was the correct beginning date of aid determined?	70	2	95.72%
20	If Minor Consent, is there a current and correctly completed MC4026 in case record?	75	2	97.34%
		Total # of questions asked	Total # of question in error	Proficiency of questions in error
<b>Supervisor Totals</b>		3100	60	98.06%

Notes:

<sup>1</sup> Column is calculated:  $(\#Cases \text{ read w/this question in error} - \#Cases \text{ with this question in Error}) / \#Cases \text{ read w/this question in error} * 100$

**Report # 22: Top 5 Error Trend Worker**

Objective:

This report will list the total number of cases for particular worker had been reviewed and what were the top 5 error questions for a selected month(s).

How to get there:

Step	Description	Section
1	Select Reports from the Main Menu	NA



2	Select Top 5 Error Trend from the Report Group list	Report Selection
3	Select Top 5 Error Trend Report-worker from Report list box	Report Selection
4	Select Month from "From" list box	Filter Selection
5	Select Month from "To" list box	Filter Selection
6	Select Region from Region list box (option select All or particular Region)	Filter Selection
7	Select District from District list box (option select All or particular District)	Filter Selection
8	Select Supervisor from Supervisor list box (option select All or particular Supervisor)	
9	Select Worker from Worker list box (option select All or particular Worker)	Filter Selection
10	Press the Get Report button	Filter Selection

Sample Report layout:

Report # 22				
San Bernardino County Human Services		Transitional Assistance Department		
Worker Trend Report		Medi-Cal		
Top 5 error questions		Review Month: March 2008 - June 2008		
District: 01				
Supervisor: B12				
Worker: L12				
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
11	Were correct procedures followed for any retroactive Medi-Cal request?	2	1	50%
6	Is there a complete Statement of Facts (MC210, MC210RV, SAWS2, etc)?	3	1	66.66%
		Total # of questions asked	Total # of question in error	Proficiency of questions in error
<b>Worker Totals</b>		100	2	98%

Report # 22 (cont)				
San Bernardino County Human Services			Transitional Assistance Department	
Worker Trend Report			Medi-Cal	
Top 5 error questions			Review Month: March 2008 - June 2008	
District: 01				
Supervisor: B12 [REDACTED]				
Worker: M12 [REDACTED]				
Question #	Question	# of cases read with this question	# of cases with this question in error	Proficiency of cases with this question in error <sup>1</sup>
2	Was the correct beginning date of aid determined?	5	2	60%
20	If Minor Consent, is there a current and correctly completed MC4026 in case record?	5	1	80%
		Total # of questions asked	Total # of question in error	Proficiency of questions in error
<b>Worker Totals</b>		250	2	99.2%

Notes:

<sup>1</sup> Column is calculated: (#Cases read w/this question in error – #Cases with this question in Error) / #Cases read w/this question in error \* 100

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