DEPARTMENT OF HEALTH AND HUMAN SERVICES
SPECIAL MEDICAL SERVICES

PARTNERS IN HEALTH
RELEASE NOTES

August 11, 2020
-mab

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Partners In Health Release Notes

Program Overview

Partners in Health (PIH) is a statewide community-based program administered by Special Medical Services (SMS) providing support to families of children with chronic health conditions or young adults (birth -21), regardless of income. PIH works directly with families and assists in finding resources to meet needs as families define and prioritize concerns and issues.

Services include:

- Case Management
- Application and Program Enrollment
- Home Visits – other Monthly Encounters
- Access to Community and Financial Resources
- School Planning
- Recreational and Respite Needs and Services
- Monitoring of Family Goals and Needs

PIH serves approximately 1200 children yearly and is contracted with regional offices throughout the state.
A Family Support Coordinators (FSC) works out the regional offices.
SMS Administration has requested that PIH have data system access. This access is integral for the contractors to more efficiently maintain enrollment and modify data as needed.
The PIH application has web access via Citrix, allowing PIH contactors access to live data. This access results in higher processing efficiency, less data entry redundancy, and improved integrity and quality of the data collected.

Application Overview

PIH application is developed using Power Builder 12.5, an Oracle 11C database and Crystal reports viewer.
The application is maintained by the State of New Hampshire (NH), Department of Information Technology, Application Systems Development (DoIT, ASD).

The PIH application accessed thru the State of NH secured Citrix portal for contracted staff and via a network logon/desktop icon for State staff.

Version 1.0.0 -7/1/2015

PIH 1.0.0 is a newly created application with data imports from a previous PIH Access database.
Data imported from the Access database includes active client records and clients who were served during SFY 13 and 14. Data from client records includes enrollment, demographic and diagnostic information.
Client contact and disbursements during SFY 14 have also been imported.

- **May 27, 2015** – Completed application training and User Acceptance Testing for all PIH users
- **June 26, 2015** – Completed final phase of User Acceptance Testing
- **July 01, 2015** – Released Version 1.0.0

At time of release, there are no outstanding issues that need to be resolved.
Any modifications, enhancements or application issues will be documented by the Business Systems Analysts via PIH Program Change Requests (CR) in the Change Request Tracking System (CRTS) database.

Version 1.0.1 – 7/29/2015

PIH 1.0.1 - Updated the monthly submission email exchange.

In the previous version, the system did not fully gather outside state email addresses to CC users that they had completed a monthly submission. A fix was inserted to allow users to receive a message box upon submission with in the application and the system is now able to gather and send emails from outside of the states email framework.

Version 1.1.0 – 3/31/2016

The focus of this project is to release a number of modifications and enhancements so that PIH continues to operate efficiently.

Application Maintenance

CR6 Case Entry – SMS vs PIH screen

- For a PIH case shared with SMS, the SMS MCO number will now pull over and update the corresponding PIH data field as expected.

CR8 System/User Information

- The worker no longer receives a database error when attempting to delete a user who has just been added to PIH.

CR9 Case Entry – Drop Downs

- The sort order is now set to the SORT_ORDER_NBR instead of alpha order for all dropdown data windows that use the SMS_CONTROL_TBL. The dropdown lists included are Case Status, Citizenship, Assistance Needed, Gender, Medicaid, Needs/Goals Activity, Needs/Goals Status, Flex Funds, Concerns, and Time.

CR11 Case Entry: Various Popup windows

- The worker can now use the keypad Enter key when adding, editing, saving, cancelling, or closing the following data windows/pop up boxes:
  - Sibling
  - Site Enrollment
  - PIH vs SMS

CRs12 & 18 Case Entries – Sibling Popup

- The worker is no longer able to save an invalid or discharged PIH Case# to a sibling entry
- A message displays requiring the user to change the case number or clear it and uncheck the Enrolled in PIH indicator.
- Inactive cases may exist if discharged after the sibling was entered.

CR14 Case Entry: Insurance Tab

- The Verification date is now cleared from the database when the Medical Verification Received check box is enabled in error and then unchecked.

CR15 Case Entry: Child /Self

- Selecting an active city with the same zip code as an inactive city will no longer cause a validation error.

CR26 Services: Family Support- Encounters Tab

- The user is now be prevented from saving a Family Support encounter entry with the same service date as a previously created row.
- The user receives a message alerting him/her that only one encounter is allowed per day.

CR27 Services: Family Support -Non-Contracted Funding

- The user can no longer change an existing Non-Contracted Funding service date to match another service date.
- The user receives a message alerting him/her that only one Non-Contracted Funding entry is allowed for a service date.

CR29 System: Diagnosis_Detail_C

- The drop down column view on the Diagnosis_Detail_C ICD10 code has been expanded so that the full description can be viewed.

User Requested

CR7 Services – Family Council Grid and Other Grid Sorts

- If the user sorts on a column within a grid, focuses on a particular row, then clicks the Save button, the focus now remains on latest entry (highlighted row). This functionality applies to sorting grids in Family Council, Encounters, Flex Funds, Non-Contracted Funding, Needs/Goals and System Code Tables.

CRs10 & 16 SMS v. PIH Screen

- Additional fields are available from the SMS database for comparison with the corresponding PIH fields for a client that is in both databases.
- The additional available fields are Primary and Secondary Email Addresses, Primary and Secondary Phone numbers, Language, Assistance Needed, Household Type, Case Relationship Race & Ethnicity, and Adult 1 & 2.
- The Update Date is now highlighted in red to alert the user of a difference between SMS and PIH.
- A message now displays giving the user an option to either populate the PIH screens with the SMS data or not. The message reads: 'Do you want to import the SMS Case data into PIH?' Yes / No
    - Yes - Populates the PIH fields with the SMS data.
    - No - Closes the message, does not import data.

CR25 Search – Family Support

- Case Status (Active or Discharged) has been added as a search parameter to the Family Support search.

CR28 Case Entry – Needs and Goals

- The Needs/Goals Start Date is no longer defaulting to the system date. The users now have the ability to enter the date.

CR32 Case Entry – Insurance Tab

- The user is now able to save changes made to an existing Medicaid Number without tabbing off the field.

CR33a- Search – Case Entry & Family Support

- The Search result no longer displays discharged Site Enrollment rows when searching Active cases.

CR33b-Search – Case Entry

- The Search result displays a check mark in the 'Has Sibling in SMS or PIH' column only if the indicator is checked on the Siblings In Home grid on the Household/Self screen
- Crystal Report – A report called 'Enrolled Siblings' has been created for PIH Support staff to run monthly showing active cases with discharged siblings. This is a quality control report for PIH support staff to update those siblings no longer enrolled in PIH.

CR34a Case Entry: Needs/Goals Data Clean Up

- With the previous release, a number of Needs and Goals records were imported from the MS Access database and sit with a status of Ongoing. These are old records and need to be cleaned up.
- All Needs/Goals rows with a status of "Ongoing" and the comment "GENERIC COMMENT - PIH CONVERSION 2015", have been changed from "Ongoing" to "Completed" with the completed date of 03/31/2016, the date of the version release.
- The "GENERIC COMMENT" comment has been amended to include the following phrase: "mark as completed by CRPIH2016-34.

CR34b Case Entry: Needs/Goals

- A new rule has been implemented that will not allow a user to discharge a case if a Needs/Goals row has a status of Ongoing. Prior to discharging a case, the user will now need to change the Needs/Goals status from Ongoing to either Completed or Withdrawn and enter a Completed Date for all activities.

CR36 Case Entry: Secondary Phone Number

- The Secondary Phone number is now disabled until the Primary Phone number has been entered.
- The Secondary phone number automatically clears if the Primary Phone number is removed.

CR37 Case Entry: Adult 1 & Adult 2

- Records will no longer save if the data for Adult 1 is cleared but Adult 2 has data. Logic now mirrors SMS - unable to have Adult 2 without Adult 1; if Adult 1 is unchecked then Adult 2 data is also cleared and disabled until Adult 1 is completed.
- Eighteen (18) records were found that did not comply with this new rule. These records have been cleaned up with this version release.

CR38 Case Entry: Needs/Goals – New Activity Status of "Continued"

- The new status of "Continued" will be used during REDE time when the need or goal has not been completed but is still being addressed with a family.
- Once the user selects the Status of Continued, the Continued Date field will be defaulted to the system date.
- After one year from the Continued Date, the Needs/Goals rows with the status of "Continued" need to be reviewed by the PIH Family Support Coordinator.
- Crystal Report – An Updated Needs and Goals report has been created for users to review those entries with the status of "Continued" that are more than one (1) year old.

CR 39 Crystal Reports

- All year-end Fiscal report have been reviewed, Existing reports have been modifying existing and/or new reports created in order to meet the data needs requested.

Version 1.1.0 – 10/10/2016

Update Oracle database for maintenance purposes.

Database Maintenance/Modifications

CR-31 Oracle 12C and PowerBuilder 12.6

- PIH has been migrated to new Oracle 12C server (HHS vs. HLT)
- PowerBuilder has been upgraded to 12.6.

CR-35 Secure Method to Launch Crystal Reports

- Implement a secure method of launching Crystal Reports from PowerBuilder. Replace the current Auth information in Crystal Reports URL when launching from PowerBuilder with encrypted on otherwise hidden credentials.
- Convert Crystal Reports launches to use a token for authentication. (SMS CR251)

Version 1.2.0 – 02/22/2017

Focus on this release is to display a quick overall view of program and regional data. Implementation of new rules: To help maintain quality data, to allow for better administrative oversight and have users be more independent in utilizing various database features.

Database Maintenance & user requested modifications

CR2016-42 Crystal Reports List Sort Order

- When user opens the report module the report listed under Select Report Category will be in alpha order, ascending.

- When user selects/highlights a report in the Select Report Category the Select Report (left column) listed with associated category will be listed in alpha order, ascending.

CR2016-43 Null Object Error R0002 on Closing

- When user opens the application and runs one or more reports and then exits the application using the large 'X' in the top right corner, the application will close without receiving 'PowerBuilder application execution error (R002) - Application Terminated' error.

CR2016-44 SMS Case Number Not Clearing

- When user opens a record (active/discharged) that was linked with a SMS case and receives notification that the SMS case is no longer active, selects OK on the notification message the SMS Case # will be removed from the PIH record (PIH_CASE_TBL.SMS_CASE_NO).
- Field should remain disabled to users who do not have permission write to this field.

CR2016-45 Modify $750 Override Criteria & CR2016-58 Override Approval Request

- Removal of Grant Disbursed to the override threshold amount of $750.00
- Override and Approval Check boxes created
    - This new method will allow the user to save the payment data entered and request an override all in one transaction.
- Allow administration the ability to open a data window any time to view and open all requests for payments that need to have override approval.
    - Display creation date to track the time between when the request was made to approval.
- Allow monthly submission for encounters without approval, after approved submission will be required.
- Monthly submission email adjusted to show count encounters waiting for approval.

CR2016-46 Medicaid Number (MID) Not Clearing

- When Medicaid eligibility is switched from Yes to No all the related Medicaid fields will be cleared and disabled on the screen and previous data will be deleted from the PIH_CASE_TBL.
    - MCO (code) and MCO Number fields are also cleared.

CR2016-47 Duplicate Case Number Error

- When user adjusts or creates a case that is duplicative, the correct message will appear and Case changes will not be saved or New case will not be created.
    - Duplication occurs when there is an EXACT MATCH on First Name, Last Name, Date of Birth, and Gender.
- Message has been adjusted and easier to read
- Message displays
    - New Case upon user leaving the Gender Field
    - Updated Case at the Save

CR2016-51 Add ability to store Supporting Doc Images

- Users will have the ability to Insert & View & Delete documents in to a specific case
- Documents available to upload will be in the format of a JPG or PDF.

CR2016-52 Duplicate Site Enrollments

- Rule Enforcement - client cannot have 2 enrollments in the same Region Code when the site enrollment discharge date and site enrollment start date are not greater than 365 days apart.
- Message will occur when user tries to create duplicate rows.
- Rule is only effective for cases created after the date of 2/22/2017, the error rate before this was to great and unable to fix. Many are from the original conversion and others have been created since the release or entered as data fixes.

CR2016-53 Drop- Down Anchor on resize

- Will now move with the data window when resizing

CR2016-54 Increase Various Field Sizes

- Increase the comment box character limits from 500 to 2000 on the Encounter, Flex Fund, and Un-Contracted Funding Comment box.
- Increase the size on Needs and Goals Comment from 1000 to Maximum size of 4000
- Add a character Counter to all Comment Boxes
  - Display current characters used and maximum values allowed

CR2016-55 Add Dashboard capability

Display Current SFY data By Region, offering a quick glance at some key case information without having to run a report.

- **Case counts for:**
  - Active Cases
  - Active by Age Groups (14- 19/20/21 +)
  - Shared with SMS (must have SMS case number with PIH Case number and be active in SMS; all programs)
- **View:**

Menu items that are most used will open via the LAUNCH button rather than going to the menu and selecting. This method is still a valid way to get to selected screens.
Menu Items include:

  - Case
  - Family Support
  - Family Council
  - Monthly Submission
  - Reports
  - Unapproved Flex Funds (by permission only; Displays encounter that will need management approval)

- **Region Data displayed as:**

  - **Active cases** – Count of all Active cases (distinct)
  - **Overdue Applications** – Distinct count of cases where the Update Application -13 months from system date (font = Bold/Red> 5)
  - **Pending Overrides** – Count of Cases where the Override box is checked and Approval box is not. (font = Bold red > 0)
  - **Flex Funds Submitted** – Sum of Flex Funds spent using the Fund Type Code (1,2,3,4,7) and Batch Number is not Null and Service Date in SFY
  - **Family Council Submitted** – Sum of Family Council Submitted with the Fund Type Code (1,2,3,4,7) and Batch Number is not Null and Service Date in SFY
  - **YTD Submitted** – Sum of Total of Flex Fund Submitted and Family Council Submitted
  - **Last Monthly Submission** - Most Recent Batch Date
  - **Active Medicaid Enrollment** – Count of all Active clients with Medicaid ='Y'
  - **Medicaid Units Billed** – Count of Billed Medicaid from Encounters where Billed MA 'Y' and Service Date in SFY
  - **Medicaid Units Balance** - Difference between set amount in SMS Control Table, by Region and Medicaid Units Billed
  - **Amount Submitted** – Units * 331.50

CR2016-57 PowerBuilder Accessibility Error

Application maintenance, non-user change

CR2017-59 Fiscal Year View button

New report to launch from the Family Support window. This report will display all of the selected clients Family Support activity for the current SFY, including ongoing case assessment comments. Can be exported or just viewed. Report can also be found in the report list.

CR2017-60 Change Crystal Server Access

Changed to IP address to run reports

CR2017-61 Adjust Case App Dates

List of cases that are shared with SMS where the application and update dates are not in sync. The selected cases will have the update dates and or application dates to match with SMS joint case.

To alleviate this in the future the PIH Application date is no longer populated with the current date, it will need to be manually entered by the user, giving the opportunity o view the 3 critical dates to alleviate this error.

Version 1.2.1 – 7/13/2017

CR2017-64 Exclude VIEW report Category

Reports within the PIH databases that are run from a view button on various screens should be run from the report button so that the correct parameters are passed. This also will alleviate the confusion of duplicative reports listed in the reports grid. This will ensure greater accuracy.

CR2017 -66 Family Council DDDW – add Grants Distributed

User request to add the ability to disburse grants from Family Council Tab, providing the users to record grant funding used that is not going to a family but for other events as a grant allows. All Crystal reports that refer to grant funding distributed have been adjusted to include this category.

CR2017- SMS vs PIH 2nd Phone Number error

The 2nd phone number will now overwrite properly.

CR2017- 69a - Wrong SFY in Dashboard and Family Support Totals

Modification of code to calculate state fiscal year and update automatically

CR2017-69b - Modify Dashboard to match MAB's Crystal Report

The SFY calculation adjustment

CR 2017 -70- This is NOT just a test!

Removal of clause for emails sent to users indicting a monthly submission has been sent.

Version 2.0 – 11/16/2017

New Module Added

CR 266 _Information and Referral (SMS /PIH)

New module created to record Information and Referral. SMS already records this in an Access database that has been converted and now shared with PIH. Module is identical in each application and shares same I&R tables. No PIH data was uploaded.

Tables created & Shared with SMS

- IR_CONTROL_TBL
- IR_CONTACT_TBL
- IR_CONDITION_TBL
- IR_CONCERN_TBL
- IR_SERVICES_TBL
- IR_REFERRAL_TBL

Adjustments were also made to the SMS_CONTROL_TBL

Control tables accessed in PIH for modification by administration

Database Maintenance & User Requested Modifications

CR2017_63 Area Agency, Early Supports & Waiver

Data validation of Insurance tab checkbox Area Agency and Early Supports which is also linked to the Site enrollment Waiver Check box.

Disable and Enable check boxes based on DHHS rules, policy and process

Cr2017_71 PIH Questionnaire
Addition of the PIH family assessment questions added to the Case Entry Needs/Goals tab.
Questions are reflective of conditions health impact and families household expenses.
Health Impact compared to Medical verification , HH Expenses to coincide with funding provided.

CR2017_72 Read only document view
Allow users with PIH application read only permission to view documents in case records. Users will not be able to add or delete documents but will now be able to view and print documents that are currently available. This allows for better collaboration between programs.

CR2017_75 Monthly Submission Check box
Addition of submit check box added to monthly submission of monthly funding sent. Allows for selection of which rows to be submitted. This is mandatory for users to now check of each row individually to be submitted. Rows with a required approval submission check box cannot be selected by regular user, permission based on approval permission. Batch will on consist of those checked.
Message box at time of submission will validate number of rows submitted ,grouped by type. This did not replace the email confirmation, user will receive both.

Update App Button
Control button added to the case entry module that will launch an update application for the open record.

Crystal Reports
All effected reports were updated to reflect database changes and have been made available to users.

Version 2.1.0 –March 2,2018

User Requested Modifications

CR2017-65 Medicaid Billed Modifications
Services→Family Support→ Encounters: Billed Medicaid
Users will only be able to submit on Medicaid billing per client per calendar year. If users tries to submit more than one encounter per month for the same client user will receive and error message . Message will prompt user to either adjust previous entry or current entry.
Per He-M rules Case Management billing can only occur one time per month per client. This will affect the Billed Medicaid Counts to be more accurate on the PIH Dashboard for each region.

CR2017-77 Multiple Case Creation Error
Case→PIH Entry: Needs and Goals Tab
Additional questionnaire fields will be refreshed upon opening screen, New cases will have all fields set to null, ongoing cases will continue to display previous entries.

CR2017-78 ICD Last Updated Date
Case→PIH Entry: Program Tab
Screen was resized so the date field will be visible when first opened, User will no longer need to resize the screen to view the entered and saved date in this field.

CR2017-79 Add Case Provider Table
Case→PIH Entry: Providers Tab
New Module for clients providers. Ability for users to enter providers as listed on the SMS Application. Users will have the choice of Provider type (in a drop down selection), Entry of Provider Name/Office , address and phone number. Providers entered will default to Active, users have the option to delete or inactivate providers.

Database Maintenance

CR2017-80 Add All and None to Permissions

Administrative change, when adding or removing users the administrator can select ALL button and all permissions are granted, and user set to Active. When None is selected user will become inactive and all permissions will be removed.

CR2017-81 Add SMS/PIH Flags to Service Detail Table

As a new standard for shared tables new columns will be created as PIH & SMS so that each application can only view those active/selected for the specified program. Table and has been added to System→ PIH System Tables

CR2018-82 Add GIS ID to Service County Table

Column added to include GIS county code for NH , this will be the link for the mapping software so that the data will not need to be manipulated. This is also a shard table and has been added to System→ PIH System Tables.

CR2018-83 Add Email to Care Coordinator Table

Column added to Care Coordinator table as optional. This will be used in letters to display email address under signature line. This table has been added to System→ PIH System Tables

Crystal Reports

All effected reports were updated to reflect database changes and have been made available to users.

- I&R view
- Update App

Version 2.2.0 –12/19/2019

New Secure Crystal Report Server

All Crystal Reports must be moved to, and executed from, a new SECURE Crystal Reports Server.
As part of this,

- all of the existing crystal Reports will have to be migrated.
- all of the domains in the database table will also have to be modified.
- the existing algorithm to launch reports must be changed, as the current "Inetresult" non-visual object does not support HTTPS.

Reduce size of Crystal Report URLs

All of the Crystal Report URLs for the reports contain a common prefix.
Reduce this field to just contain the report number.
This will greatly facilitate the size of the updates to this field.

Version 2.2.1 –01/09/2020

Use OpenDoc vs View Report for Crystal Reports

New Crystal Server was not handling the volume or releasing crystal report sessions in a timely manner, this was an option to bypass this so that more users could run reports without errors.

Version 2.2.2 –02/13/2020

Use new Authentication Token

Added a timer to the Authentication token which can be adjusted in CRA to remove Auth token from server as a certain period of time, Crystal server was not removing this token timely and users were continually getting errors when running reports. This can now be adjusted manually.

Version 3.0.0 8/26/2020

User Requested Modifications:

CR-PIH2019-1 Add Document Type & CR-PIH2020-19 Insurance-PCP, Add/Edit Provider

- New drop down field added to 'Add Document' pop up box, the drop down will determine and describe the type of document that will be added. This was included to mirror the SMS add document. Will also allow to create a report when looking for select document types (waivers or TRA surveys).
- Allows users to only see those for PIH and not those used for SMS

CR-PIH2019-2 New Encounter Tab Rules Region I14

- Disabled billable service drop down when a case is in the I14 region code, users should not be able to bill for Medicaid services when a case is not enrolled in an actual region. This will maintain data integrity.
- When this field is selected and the case record did not indicate Medicaid as a form of insurance the user will receive message that the selected client 'Is not open for Medicaid Services', however this will not prevent the user from saving this option.

CR-PIH2019-3 Label Changes to Self/Insurance/CR-PIH2020-20 Initial Disable New Docs Tab/CR-PIH2019-7 Change Med Verify Doc Rules/CR-PIH2020-4 New Waiver Grid, Shuffle Existing Grids

PIH Case Entry (the above 4 CR's are related to changes and work together as described below)

- **Household/Self Tab:**
  - Removal of US Citizenship Question
  - Label change to dropdown selections:
    - Household Type changed to '**Adults in Household Are**'
    - Relationship to Child changed to '**Adults Relationship to Applicant**'
- **Insurance /PCPs Tab:**
  - Tab name change from **Insurance** to **Insurance/PCP**
  - Medical verification check box of received is no longer required to create a NEW case
  - Label change to dropdown selections: Medical Verification
    - From Received Check box to **Received/Reviewed check box**
    - From Received by to **Received /Reviewed By**
      - Removed staff number disabled field
    - From Doctors Name/Address/Phone to '**Verification Completed by Name/Address/Phone**'
  - Moved Providers to bottom of this Tab
    - Will not be enabled until for NEW cases until Case had been saved (all mandatory fields completed)
- **Documents: New Tab**
  - Documents moved from Insurance Tab to Documents Tab
  - Will not be enabled for New Cases not until Case has been saved.
  - Document ADD window has New drop down selection to add Source (mandatory selection)
    - Source = Document type to be uploaded such as Waiver, Application, Medical Verification , Letter etc..
  - Waiver Grid : New
    - Add request for case Waivers
    - Pop up window to add Waiver Begin and End Date
    - Management will approve or deny waiver here

CR-PIH2019-6 New Family Council Fund Types

In-kind donations was added to the fund type dropdowns to show the difference between grants received and what is received as a donation. This was also included in the columns for submission and FY total grids. This new fund type is not included in the Monthly Invoice validation to be processed and is not counted against clients 750.00 threshold amount.

CR-PIH2019-9 Add Additional Encounter Fields

- Three new drop down felids were added to the encounter detail section.
  - Staff/FSC is mandatory to allow users to select the person who completed the encounter for data integrity
  - Two optional concern drop downs were added so users can better identify the encounter needs.

- Three new check boxes added for SMS Collaboration , Interpreter used and Transition survey completion.
    - All are optional
- Label change from Billed M'Caid to 'Billable Service'
- Flex Fund tab is disabled when case is enrolled in Intake (I14)

CR-PIH2019-10 Double Click Launches Report

Ability to launch the report by double clicking on the report selection in the right side of the report grid

CR-PIH2020-2a Add Select All Capability

- Monthly Submission
    - New button 'Select All' added to 'Pending encounters and payments' and 'Site pending family council and grant payments'
    - the 'Select All' button will check off all pending rows to be submitted.
        - This is a change from having to select each row individually.
        - User still has the ability to uncheck any row desired.
        - Will not select those rows where override has not been approved.

CR-PIH2020-2b Add New Columns to Site Pending List

To display the additional concerns listed, and new fund types used a corresponding column to view these entries has been added.

CR-PIH2020-3a Add Family Council SFY Expenditure Grid & CR-PIH2020-22 Add In-Kind to Family Support Totals

- A new grid has been added that will calculate a regions family council expenditures by fiscal year by funds types used
- A new fund type option 'In-Kind Donations' was added to distinguish between donation and grants received.

CR-PIH2020-3b Add Family Council Members and Minutes

- Family Council New Tab
    - Members and Uploads
    - Two Standard Grids
        - Add/Edit/Remove functionality
        - Standard pop-up windows to add data
- Members Grid
    - Allow users to add Family Council Members
- Upload Grid
    - Allows users to upload Council information

CR-PIH2020-5 Case Search Changes

- Users will have the ability to search cases using a program selection
    - BOTH (PIH and SMS cases , active or discharged)
    - PIH Only (active /discharged, Family Support Coordinator)
    - SMS Only (active/discharged, SMS Provider name)
- Discharged Records will appear in Red Text
- SMS Cases will be highlighted in Yellow with system bold text

CR-PIH2020-21 Blank Row to Client Search Bureau Status

A blank row was added to the search drop down for when users want to switch between active , discharged or all.

CR-PIH2020-6 Allow Adjusting Submitted Encounters

Management will be able to add a fund disbursement to an existing submitted encounter using the 'Adjust' button.

CR-PIH2020-8, Add New Overdue Applications Window

- New module 'Over/due Applications'

- This window will allow users to view which clients are either overdue (greater than 12 months from last update date) or Due applications (at 12 months from last update date)
- Users can sort by double clicking on the headers of any columns
- Users can open the case record by double clicking on highlighted row or using the 'Open' button at the bottom of the window
- Users have the ability to limit viewed rows by using either/both of the drop downs Site or Staff

CR-PIH2020-10 Disabled Needs and Goals Comments & CR-PIH2020-14 Disabled Encounter Comments

A right scroll bar was added to these comment boxes so that when the action is disabled (completion/discharged) that a user will be able to scroll in the comment box and view all of the content as written.

Database Maintenance

CR-PIH2020-18 System Tables, Provider Type

Additional columns added to distinguish between SMS /PIH and Document use. This is a shared table between systems and multiple uses with in both. This update will need to be added to the SMS release as well.

CR-PIH2020-7a Add Region Code to Staff Table

New column added to the staff table to link staff to a region where there can be multiple staff per region code. This link is used in various database reports.

CR-PIH2020-7b Add Address to Site Table

New column added to the site table to be used in various reports linked to site.

CR-PIH2020-17 Crystal Report Code Table Screen

Decreased size in URL column , validate that those with a VIEW category are not on display to the user.

CR-PIH2020-24 Monthly Submissions on SIT

Change from email being sent to popup message as validation of successful transmission.

CR-PIH2020-25 Dashboard Changes

Corrected spelling of "family" in column header, changed the number of months from 13 to 12 for overdue applications, so that this will match the new module

CR-PIH2020-27 Cannot close app after Session timeout

Higher security has left orphaned app sessions when there has not been any actions in the app for a period of time. This will close the session completely when timed out so user can log back on successfully.

Notes

Any modifications, enhancements, or application issues will be documented by the Business Systems Analysts via PIH Program Change Requests (CR) in the Change Request Tracking System (CRTS) database.
Also, refer to Version Business Requirement Documents for further explanation of changes and functionality.