GOVERNMENT OF PUERTO RICO

Department of Health
Medicaid Program

Completed Enhanced Workload Management FDD Deliverable I.4.2.i.ii

PREE Project
Government of Puerto Rico

Version 1.4
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Document Revision History

Version Number	Date	Description
0.1	01/13/2020	Initial Draft
0.5	02/28/2020	QC Review
0.8	03/03/2020	Initial Draft for Review
0.9	03/13/2020	Final Draft for Review • Updated the FDD per the comment from the CIM. Also added new sections: Add Application via IC • Ex Parte Recertification Batch
0.9	08/03/2020	Sections updated per CIM comment review: • 5.1.3 New Application – added prepopulated application as a new application type instead of replacing the expedited application option. This will give caseworker the option between an expedited application and a prepopulate application. • 5.3 New Task Pages – for each sub-section, validation error for blank assignment details was removed and auto assignment of task using the regional queue assignment logic when assignment details are blank was added. • 9.1 Prepopulated Application – PREE will provide caseworker the option to complete a prepopulated application vs an expedited version. PRMP to define which application option to be used by the caseworker as part of Training and OCM. • 5.2 Application – Relocated automated trigger from the Ready for Determination button to the Authorize page. On this page, caseworkers will be able to authorize for all or for an individual.
1.0	09/09/2020	Final Draft for Review

Version Number	Date	Description
1.1	6/4/2021	Initial Draft for Review CR103 – updated the following sections to (A) prevent applicants from receiving and beneficiaries from continue to receive benefit when they are a Verification Dependent of an unverified evidence AND (B) to correct errors within this document. ▪ Application ▪ Change of Circumstances ▪ Recertification ▪ Determine if Application is Ready for Determination Task (New) ▪ Past Due Application Task (New) ▪ <CR103> ~~Notification~~ ▪ Use Case 1: Intake and Application Process using Prepopulated Application ▪ Use Case 2: Processing a COC ▪ Scenario 2: Auto Assessment and Authorization ▪ Scenario 4: Task and Notification Processing
1.2	7/9/2021	Modification made to the following sections as part of CR103 CIM: ▪ <CR103> Task ▪ Past Due Application Task (New)
1.3	07/15/2021	Final Submission for CR 103

<table>
<tr><th>Version Number</th><th>Date</th><th>Description</th></tr>
<tr><td>1.4</td><td>08/25/2022</td><td>Initial draft for review:
Modification made to the following sections per the following Design Issues:
<table>
<tr><th>JIRA Ticket</th><th>Section</th></tr>
<tr><td>PR-15453</td><td>Section <PR-15453> Prepopulated Medical Assistance IEG Application Page Flow – relocated. The design for the Prepopulated Medical Assistance IEG Application has been relocated to the Intake Application FDD.</td></tr>
<tr><td>PR-15855</td><td>Section New Task Pages - updated to rename Category to Task Type since Category already exist with a different purpose.
Section Tasks - Task template was also updated to rename Category to Task Type.</td></tr>
<tr><td>PR-15856</td><td>Section Regional Work Queue Prioritization Logic – added clarification that the Work Queue Prioritization will be used by the Get Next Task feature.</td></tr>
<tr><td>PR-15857</td><td>Section New Task from Inbox – updated validation display logic</td></tr>
<tr><td>PR-16133</td><td>Section Determine if Application is Ready for Determination Task (New) and Past Due Application Task (New) – triggers for these tasks were updated.</td></tr>
<tr><td>PRMO-1614</td><td>Section provides screen modifications for check electronic verification and trigger for Cúram Deferred process.</td></tr>
<tr><td>PRMO-123</td><td>Section identifies non-PRMP tasks to be turned off. These tasks should not be generated.</td></tr>
</table></td></tr>
</table>

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1 Acronyms

Table 1: Acronyms

Acronym	Definition
ASES	Administración de Seguros de Salud
BPM	Business Process Modeling
BPO	Business Process Object
COC	Change of Circumstance
FDD	Functional Design Document
HCR	Health Care Reform
IC	Integrated Case
IDD	Interface Design Document
IEG	Intelligent Evidence Gathering
IV&V	Independent Verification and Validation
JAD	Joint Application Design
MAGI	Modified Adjusted Gross Income
MMIS	Medicaid Management Information System
NOD	Notice of Decision
OCM	Organizational Change Management
OOTB	Out of the Box
PDC	Product Delivery Case
PDT	Process Definition Tool

Acronym	Definition
PMO	Project Management Office
PREE	Puerto Rico Eligibility and Enrollment
PRMP	Puerto Rico Medicaid Program
PRMMIS	Puerto Rico Medicaid Management Information System
R1	Release 1
SI	System Integrator
SQL	Structured Query Language
SSN	Social Security Number
WMS	Workflow Management System

2 Introduction

2.1 Purpose

The purpose of the Enhanced Workload Management Functional Design Document (FDD) is to present the design components and considerations associated with the enhancement of the Caseworker Portal and system functionality implemented in Puerto Rico Eligibility and Enrollment (PREE) Release 1 (R1).

2.2 Scope

To describe the business processes and modifications/additions made to the Out of The Box (OOTB) functionality as updated in PREE Release 1 related to prepopulating the Medical Assistance Intelligent Evidence Gathering (IEG) application from the integrated case, auto assessment and authorization of benefits, workflows, work queues and tasks.

2.3 Not in scope

Details related to any reports, interfaces, and notices will be covered in separate FDDs. This design does not include database schemas, Structured Query Language (SQL) queries, Decision Summary Table implications, and other technical details required to fully implement the Caseworker Portal. Workflow, work queues, and tasks related to Appeals, Interfaces, Quality Control, and Fraud are not in scope and will be covered in the appropriate FDDs.

2.4 Team Members

Table 2: Team Members

Attendees	Organization
Celines Echevarria	PRMP
Jesús Ayala De León	PRMP
Joenelly Olmo Encarnación	PRMP
Luisa Quiñones Rivera	PRMP
Marleen Pérez	PRMP
Raquel Ortega	PRMP
Christina Lopez	IV&V
Ellen Douglas	IV&V
Jim Tardella	IV&V

Attendees	Organization
Mary Ann Brake	IV&V
Monica Morales	IV&V
Ronda Harris	IV&V
Janeth Merchan	PMO
Jennifer Witham	PMO
Magda Chavez	PMO
Vaidehi Padte	PMO
Barbara Dolan	SI
John Zientara	SI
Kanika Hughley	SI
Lizette Nel	SI
Marilyn Edwards	SI
Stephanie Nieves	SI
Venkat Vallepu	SI

3 Key Assumptions

Below are the Key Assumptions made during the Fit/Gap and Design processes related to this FDD:

- The Caseworker Portal functionality represented within this document is based on Puerto Rico Eligibility and Enrollment (PREE) Release 1.
- The artifacts documented in this FDD serve as a direct input for the development effort. All documented designs have been technically assessed for feasibility; however, there may be instances during the build process where new or conflicting information may force the design to be updated. In these instances, the updated proposed design will be presented to Puerto Rico Medicaid Program (PRMP) for review and approval before any build activity commences.
- The acronym "OOTB" refers to the base system functionality that was transferred from a prior implementation. This was the base system that was modified to meet Puerto Rico Eligibility and Enrollment (PREE) requirements in Release 1.
- "Release 1" refers to the first implementation of PREE functionality. This is the base system that will be modified to meet Puerto Rico Eligibility and Enrollment (PREE) requirements in Release 2.

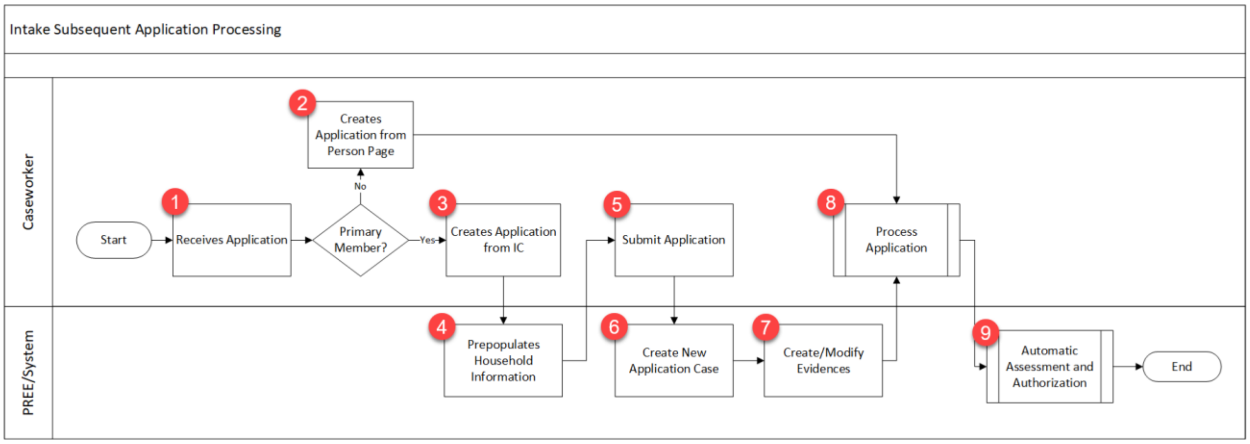
- PRMP recognizes the practicality of accepting this assumption but conditions it on the features not documented within design documents being in compliance with regulations, the Puerto Rico Medicaid State Plan and Puerto Rico public policy.
- OOTB and Release 1 functionality, which meets the state's needs, will not always be documented in detail unless there is a business or development-related reason to do so.
- The OOTB Software documentation for Cúram can be obtained at the IBM website.
- The PREE Release 1 FDDs can be obtained at the PREE SharePoint site.
- The PREE Glossary document is available on the PREE SharePoint.
- This FDD expands functionality detailed in Release 1 PREE FDDs.
- The prepopulated application process assumes the new application has the same primary member and active household members as existing Integrated Case (IC).
- The information the system will use to prepopulate the application is based on data from Household Members without an end date and their IC evidences without an end date in the past. If a field is intended to be prepopulated but the information is not present, the field remains unchanged from Release 1 functionality.
- Once the application is submitted, modified data captured through the prepopulated application IEG may update existing evidences or person data. PREE will follow the Release 1 process for capturing and storing new application data, unless otherwise stated in this design document.
- Within the Screen Modification section of the FDD, identified steps/modification are assumed to be completed by the PREE system. Unless specified, assume the action is being taken by PREE and not by the caseworker. Prepopulating fields, displaying pages or text are system actions.

4 Business Processes

4.1 Intake Subsequent Application Processing for Primary Member

This process illustrates a high-level overview of the actions taken by a caseworker and the PREE system when an applicant submits an application after a previous application has been processed (subsequent application). For additional extension paths to this process, please see the Use Cases in this document.

Figure 1: Intake Subsequent Application Processing



4.1.1 Detailed Steps

1. Caseworker Receives Application

When an application is received, the caseworker will conduct a person search to determine if the applicant is a primary member on an existing integrated case. If the applicant is a primary member and the household composition is the same, then the caseworker will create the new application from the existing IC. If the applicant is a member of an existing IC, then the caseworker will create the new application from the Person page. However, if this member is still receiving benefits on the existing case, then the caseworker must complete the Remove a Household Member process from the existing integrated case before creating a new application from the Person page.

2. Creates Application from Person Page

The caseworker will enter the data into the Medical Assistance Intelligent Evidence Gathering (IEG) Application using the information provided by an in-person applicant or a paper application. Once all the information is entered, the worker will submit the application. This process is detailed in the Release 1 (R1) Job Aids.

3. Creates Application from the Integrated Case (IC)

The caseworker will review the list of active household members. If any of the household members has left the home, then the caseworker will complete the Remove a Household Member process as described in the R1 Job Aids. Once the household members are removed, then the caseworker will create a new application from the existing IC.

4. System prepopulates the household information

The IC application process will prepopulate data for the household member(s) from the corresponding IC into the IEG application, as described in section 5.1 <PR-15453> Prepopulated Medical Assistance IEG Application .

5. Caseworker Submits the Application

The caseworker will verify the prepopulated household information, fill out the remainder of the application, and submit the application.

6. Create New Application Case

The PREE system creates a new application case.

7. Create New and Modify Evidences

Once an application case is created from the IC, the PREE system will create evidences based on the information entered through the application. Evidences associated to modified prepopulated data will be end dated and new evidences will be created as defined in section 5.1 <PR-15453> Prepopulated Medical Assistance IEG Application Page Flow of this document.

8. Process Application

The caseworker will review and resolve issues listed in the Issues page, Review and Resolve Prospect Persons page, and when verifying evidences electronically and/or manually. This process is detailed in the Release 1 (R1) Job Aids.

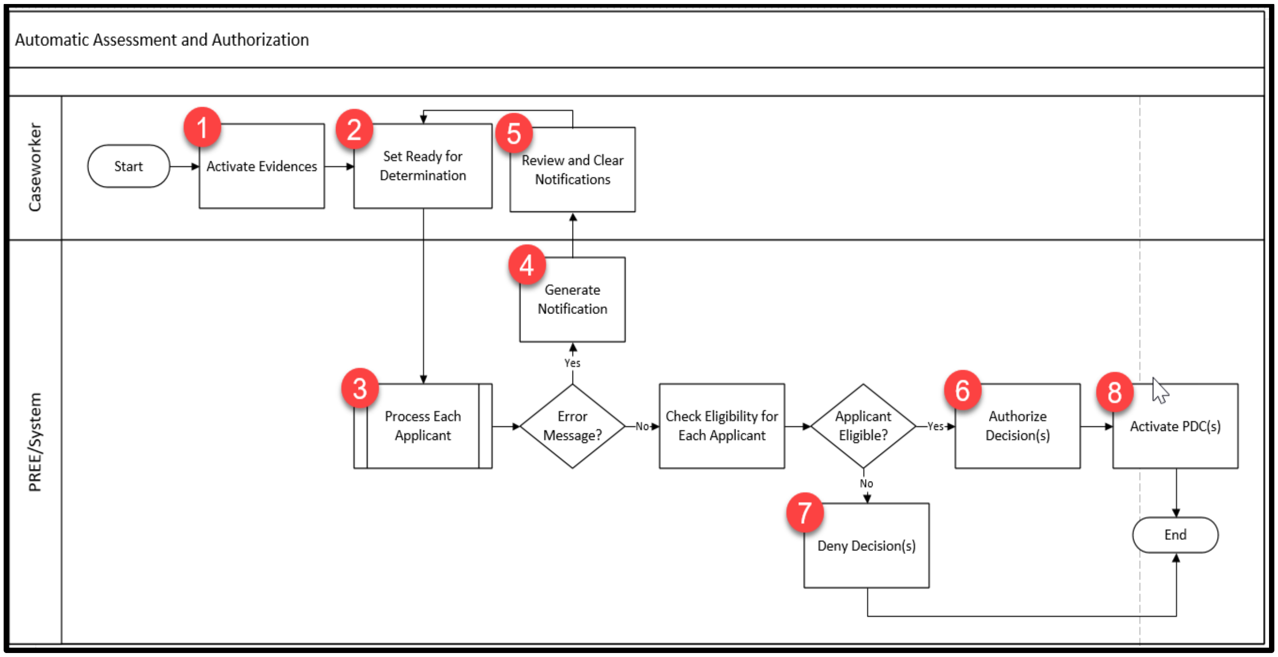
9. Automatic Assessment and Authorization

The PREE system will process each applicant decision based on the process defined in section 4.2 Automatic Assessment and Applicant Eligibility.

4.2 Automatic Assessment and Applicant Eligibility

This process illustrates a high-level overview of the actions taken by a caseworker and the PREE system when creating an application from an Integrated case (IC).

Figure 2: Automatic Assessment and Authorization



4.2.1 Detailed Steps

10. Activate Evidences

After verifications are recorded in PREE by Electronic Verification and/or by the caseworker, the caseworker will apply changes to activate all In-Edit Evidences.

11. Set status to Ready for Determination

The caseworker will then set the application status to Ready for Determination once all the evidences are activated then Review Eligibility Result. On this page the caseworker will click on 'Authorize All' and PREE will execute Check Eligibility which will determine eligibility for each applicant.

12. Process Each Applicant

PREE will process each applicant and determine if the applicant is eligible or ineligible for benefits.

13. Generate Notification

A notification is sent to the caseworker for review when the system is unable to: determine eligibility, deny the ineligible decision, authorize the eligible decision, or activate a PDC. If there are no error messages, the system will advance to the next action.

14. Review and Clear Notification

The caseworker will review notification and clear any errors preventing the case from processing. Once completed, then the caseworker can click on 'Authorize All' again.

15. Authorize Decision

If there is no issue and the applicant is eligible, PREE will be able to authorize all of the applicant's eligibility decision(s), including predictable change(s).

16. Deny Decision

If there is no issue and the applicant is ineligible, PREE will be able to deny the applicant's eligibility decision.

17. Activate PDC

For each new eligible decision authorized by PREE, a PDC will be generated and activated. Future authorized decision will also generate a PDC but will remain in an Approved status until the start of that decision.

5 Screen Modifications

This section contains screenshots that are modified based on PREE requirements and/or Joint Application Design (JAD) discussions. There are two types of screenshots. The first is Modify: these are Cúram OOTB and/or Release 1 modified screen. Modifications are identified by a numbered red square that references the description in text below the screen. The second is "New" – these are new screens created based on specific requirements which have been requested. The new screens include numbers which reference the description in the text below the screen.

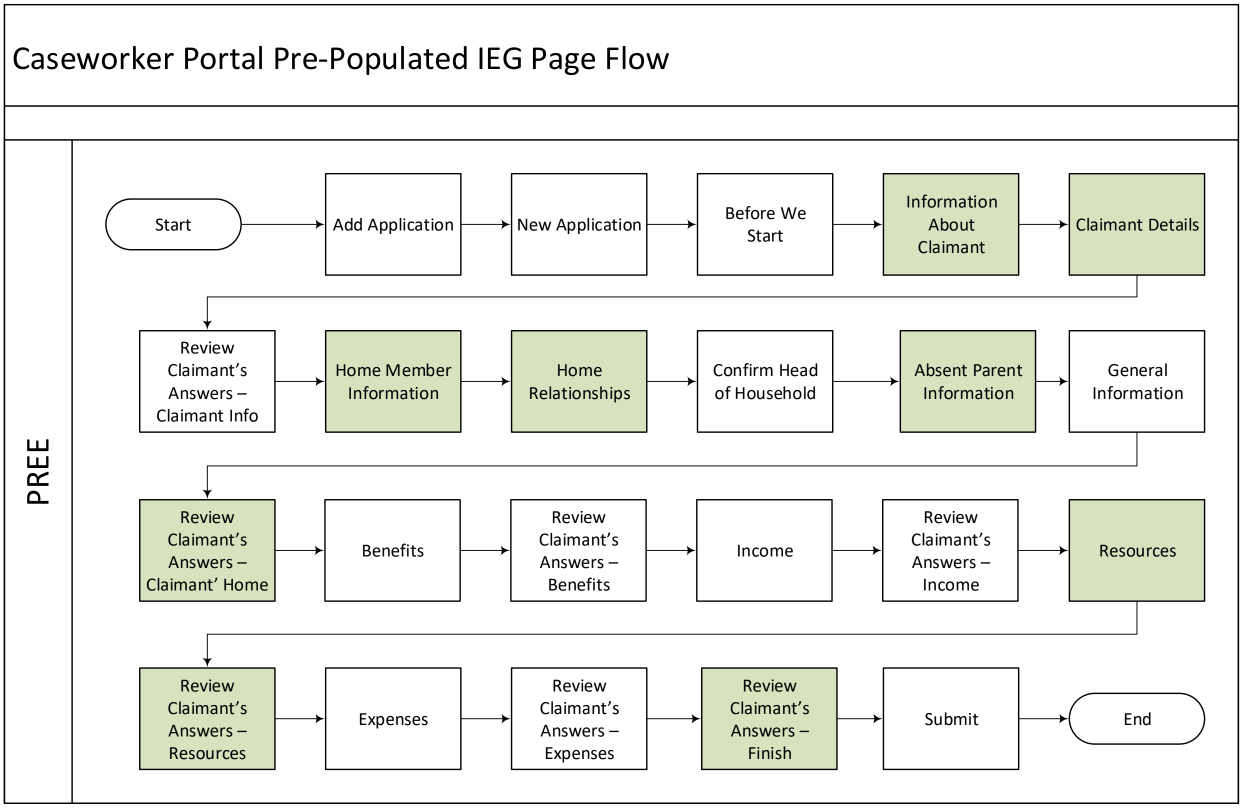
5.1 <PR-15453> Prepopulated Medical Assistance IEG Application Page Flow

The modifications related to the prepopulated Medical Assistance IEG Application was moved to the Intake Application Processing FDD in order to maintain one version of the application and its future modifications.

~~The modifications in this section pertain to the Add Application from the IC. This process is being modified to include the full Person IEG script with prepopulated data for the Medical Assistance application. This flow depicts the pages that will appear for the Medical Assistance Application in the Caseworker Portal. The boxes shaded in green represent the pages that will be prepopulated based on active evidences from the IC and Person page.~~

> ***~~Tech Notes: Once the application is submitted, available evidence fields and technical feasibility will help determine if specific evidences are end dated or updated with an effective date of change.~~***

~~Figure 3: Prepopulated IEG Page Flow~~

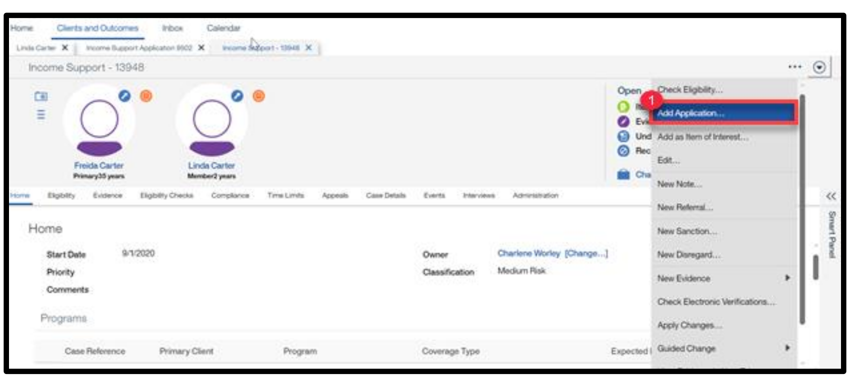


~~5.1.1 Add Application via IC~~

~~From the Action Menu on the IC, the caseworker clicks Add Application to start the new prepopulated application.~~

~~5.1.1.1 Screenshot (Modify)~~

~~Figure 2: Add Application~~



~~5.1.1.2 Description of Modifications and Additions~~

~~1. Add Application~~

~~Action Menu, Modify~~

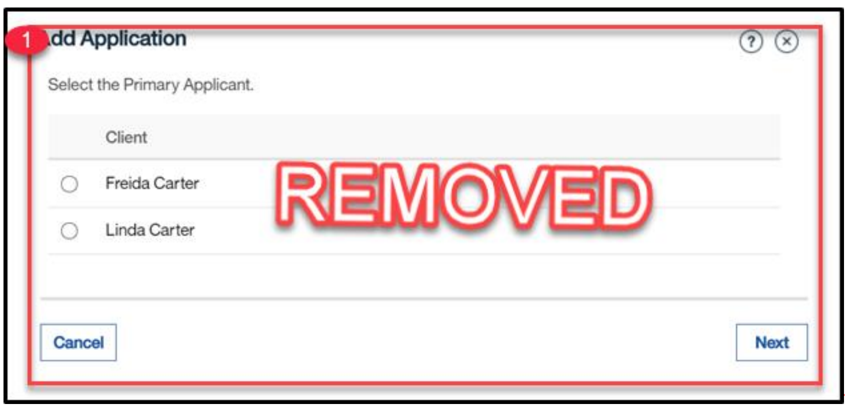
~~When the caseworker clicks on Add Application, display the New Application page of the IEG. Skip the Add Application and default the answer to be the Primary Member on the IC. The New Application page should display.~~

~~5.1.2 Remove Add Application~~

~~The Add Application page allows the user to select the Primary Applicant. For the prepopulated application process, the primary member must remain the same as in the existing IC. As a result, this page is being removed and the Primary Applicant will default to the Primary Member.~~

~~5.1.2.1 Screenshot (Remove)~~

~~Figure 3: Add Application~~



~~5.1.2.2 Description of Modifications and Additions~~

~~1. Add Application~~

~~Page, Remove~~

~~Remove the Add Application page and set the Primary Applicant to the Primary Member on the IC for the prepopulated application.~~

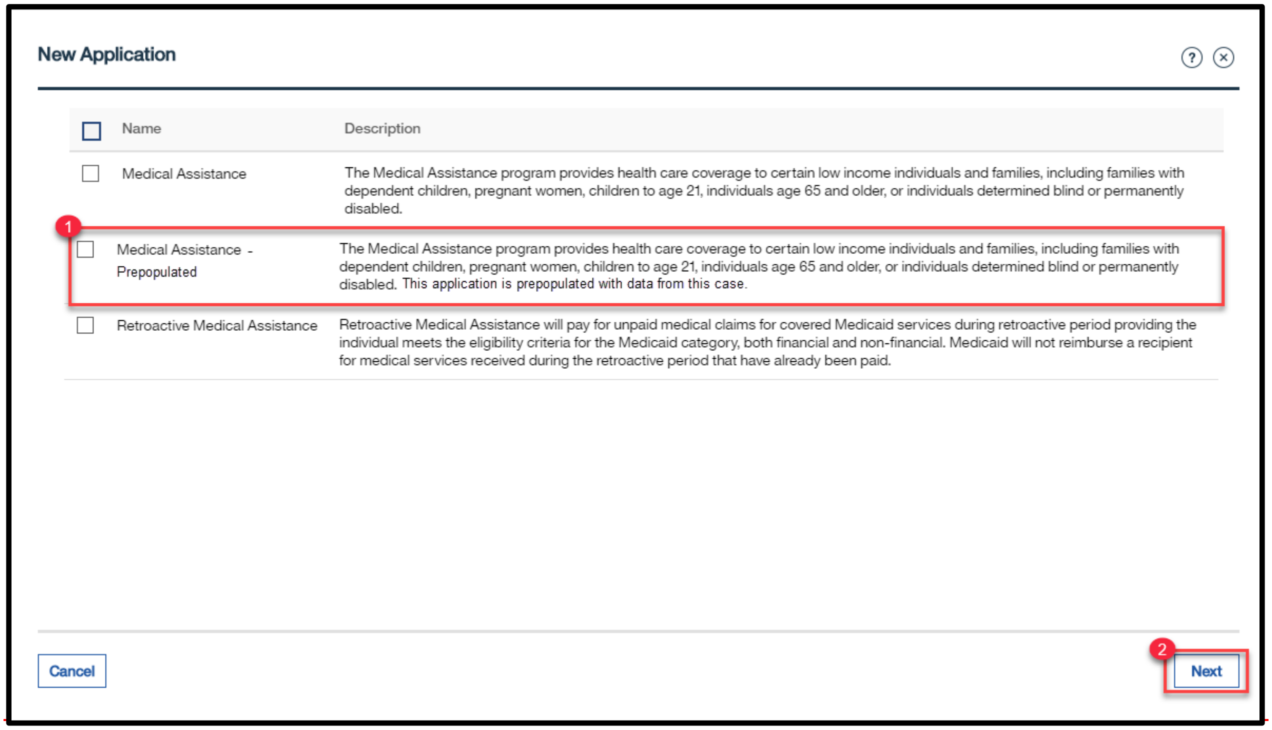
~~5.1.3 New Application~~

~~The New Application page will display when the caseworker selects Add Application from the Action Menu on the IC. When the caseworker selects the Medical~~

~~Assistance application, the full IEG application with prepopulated data related to the active household member will be generated. The Intake Subsequent Application process applies to the Medical Assistance IEG script only.~~

~~5.1.3.1 Screenshot (Modify)~~

~~Figure 4: New Application~~



~~5.1.3.2 Description of Modifications and Additions~~

~~1. Medical Assistance – Prepopulated~~

~~Checkbox, New~~

~~This new application option will provide the caseworker with the prepopulated version of the Medical Assistance Application.~~

~~Description: The Medical Assistance program provides health care coverage to certain low income individuals and families, including families with dependent children, pregnant women, children to age 21, individuals age 65 and older, or individuals determined blind or permanently disabled. This application is prepopulated with data from this case.~~

~~2. Next~~

~~Button, Modify~~

~~When the caseworker selects 'Medical Assistance – Prepopulated' and clicks on the 'Next' button, the system will display the first page of the IEG application, which is~~

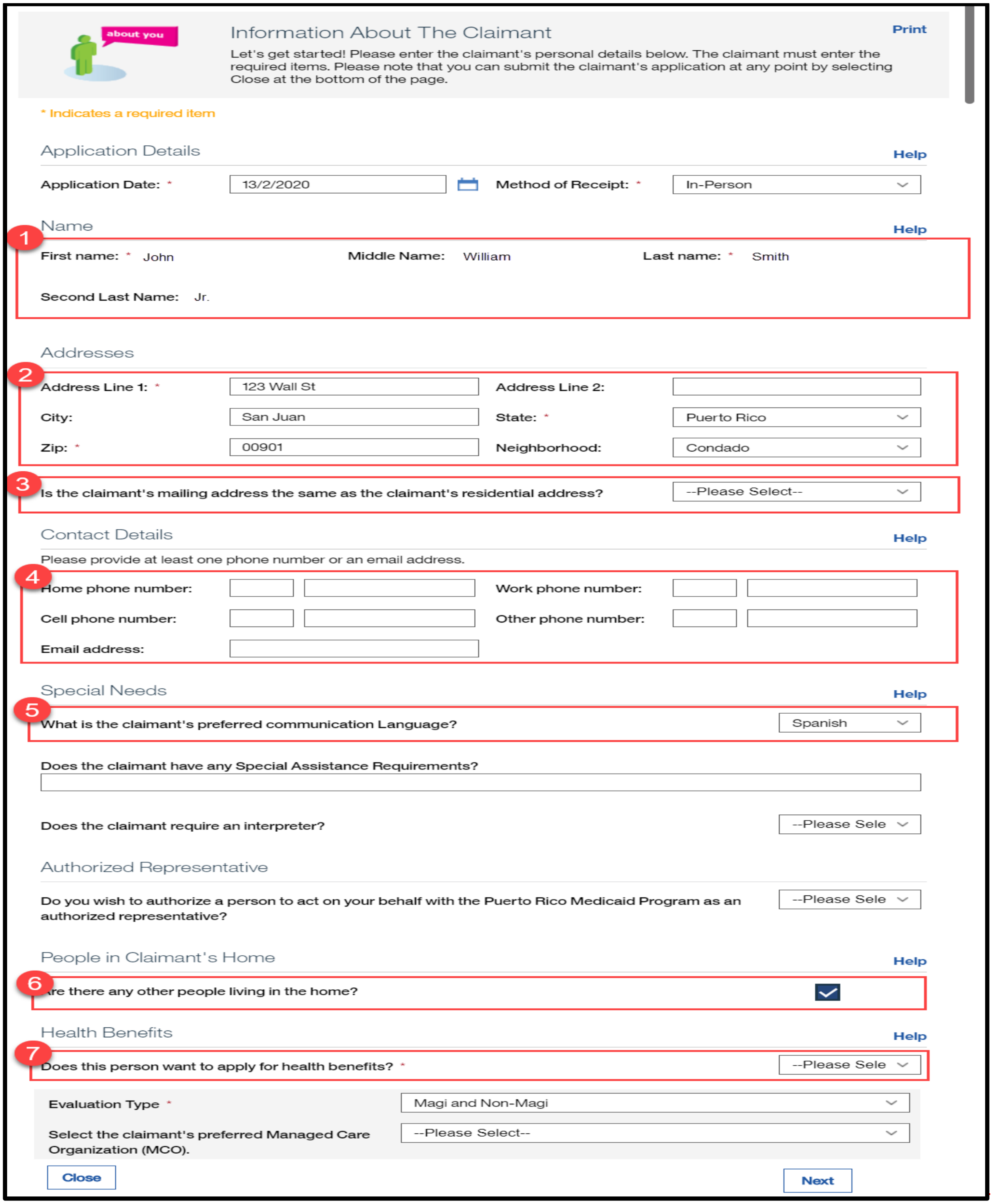
~~"Before we start". This will allow the caseworker to complete the full IEG application via the IC with prepopulated data.~~

~~5.1.4 Information About the Claimant Page~~

~~The "Information About the Claimant" page will allow the user to capture the claimant details such as name, address, contact and special needs, etc. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.4.1 Screenshot (Modify)~~

~~Figure 5: Information about the Claimant~~



~~5.1.4.2 Description of Modifications and Additions~~

~~1. Name Cluster:~~

~~Static Text, Modify~~

~~Prepopulate Name Cluster fields with the name of the active primary member.~~

~~2. Addresses Cluster:~~

~~Cluster, Modify, Mandatory~~

~~Prepopulate the Addresses Cluster fields with the active Addresses evidence of type Private for the primary member. If a change is recorded, then end date existing evidence one day prior to the current application date.~~

~~3. 'Is the claimant's mailing address the same as the claimant's residential address?'~~

~~Dropdown, Modify, Optional~~

~~If caseworker selects No, then prepopulate mailing address fields with the active Addresses evidence type of Mailing. If a change is recorded, then end date existing evidence one day prior to the current application date.~~

~~4. Contact Details Cluster:~~

~~Cluster, Modify, Optional~~

~~Prepopulate the Contact Details Cluster fields with the active preferred phone numbers and email address of the primary member on the IC.~~

~~If a phone number/email exists and a new one is added, then end date the appropriate evidence one day prior to the current application date. Then create the appropriate evidence with the new phone number/email as usual and set the Preferred indicator in the evidence to True.~~

~~If a phone number/email does not exist and a new one is added, then create the appropriate evidence as normal and set the Preferred indicator to True.~~

~~5. What is the claimant's preferred communication Language?~~

~~Drop down, Modify, Optional~~

~~Prepopulate this field. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of the change.~~

~~6. Are there any other people living in the home?~~

~~Static Text, Modify, Mandatory~~

~~Prepopulate this check box to true and set as a static text, if there is an active household member. The system will not allow the caseworker to modify this field until after the caseworker reaches the last known household member in IEG, then allow the caseworker to select the checkbox to add a new member.~~

~~7. Does this person want to apply for health benefits?~~

~~Dropdown, Modify, Mandatory~~

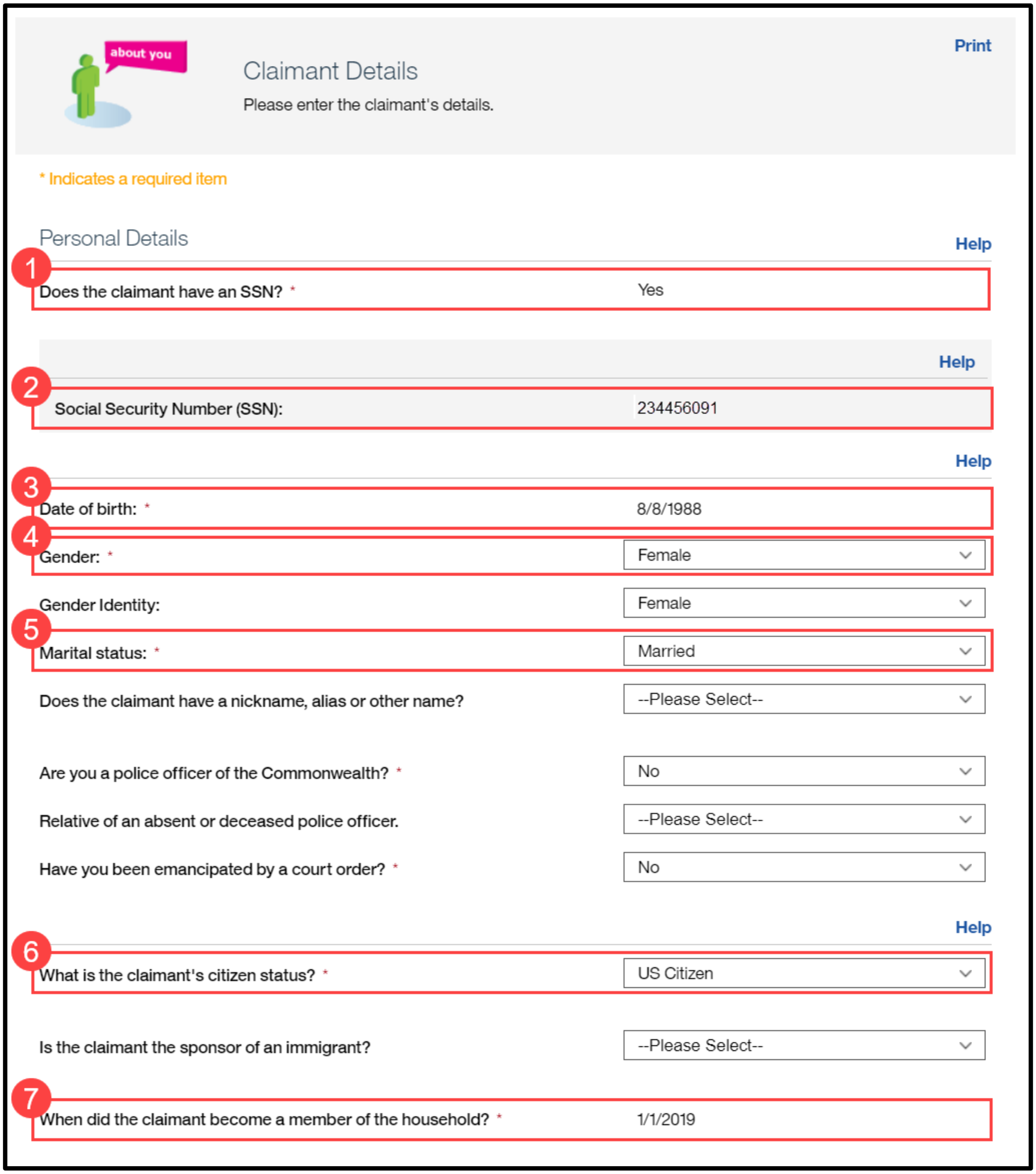
~~If the caseworker selects No, then the system will set the applicant status to non-applicant. If the caseworker selects Yes, then the system will set the applicant status to applicant on the appropriate evidence.~~

~~5.1.5 Claimant Details Page~~

~~The full version of the Claimant Details page will display if the caseworker enters "Yes" to "Does this person want to apply for health benefits?" on the previous page. This page will collect all the details needed from the claimant to be evaluated for Medical Assistance. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.5.1 Screenshot (Modify)~~

~~Figure 6: Claimant Details (1)~~



about you

Claimant Details

Please enter the claimant's details.

Print

* Indicates a required item

Personal Details

Help

1 Does the claimant have an SSN? *	Yes

Help

2 Social Security Number (SSN):	234456091

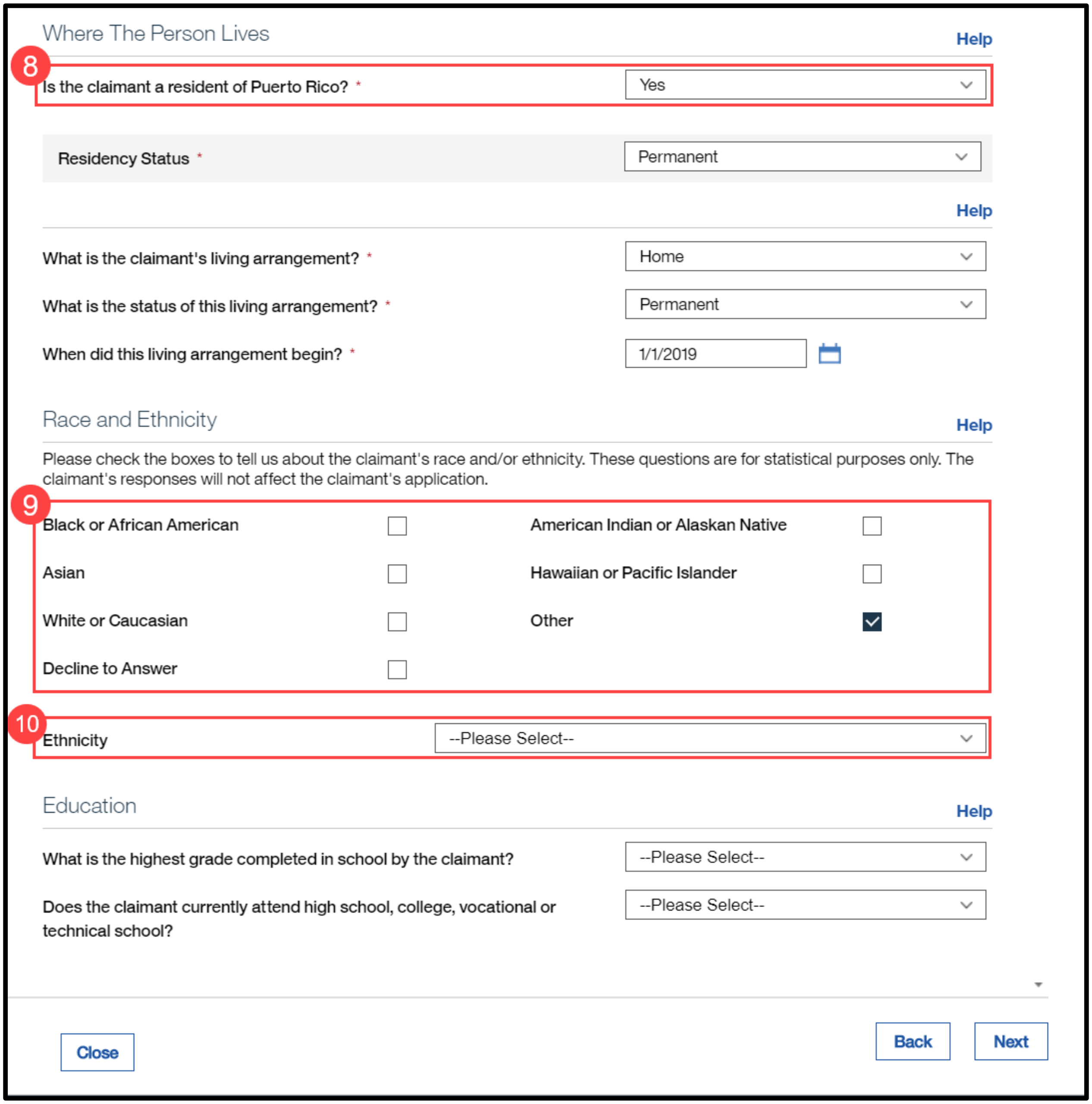
Help

3 Date of birth: *	8/8/1988
4 Gender: *	Female
Gender Identity:	Female
5 Marital status: *	Married
Does the claimant have a nickname, alias or other name?	--Please Select--
Are you a police officer of the Commonwealth? *	No
Relative of an absent or deceased police officer.	--Please Select--
Have you been emancipated by a court order? *	No

Help

6 What is the claimant's citizen status? *	US Citizen
Is the claimant the sponsor of an immigrant?	--Please Select--
7 When did the claimant become a member of the household? *	1/1/2019

~~Figure 7: Claimant Details (2)~~



~~5.1.5.2 Description of Modifications and Additions~~

~~Person Details Cluster:~~

~~1. Does the claimant have an SSN?~~

~~Static Text, Modify, Mandatory~~

~~If the household member's Social Security Number (SSN) is known and active, then the system will set the answer to Yes.~~

~~2. Social Security Number (SSN):~~

~~Static Text, Modify, Mandatory~~

~~Prepopulate the primary member's SSN based on the active evidence.~~

~~3. Date of birth:~~

~~Static Text, Modify, Mandatory~~

~~Prepopulate the primary member's date of birth based on the active evidence.~~

~~4. Gender:~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the primary member's gender based on the active evidence. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~5. Marital Status:~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the primary member's marital status based on the active evidence. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~6. What is the claimant's citizen's status?~~

~~Dropdown, Modify, Mandatory~~

~~If the existing active evidence indicates the primary member is an US Citizen or US National, then prepopulate the primary member's citizen status, otherwise do not. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~7. When did the claimant become a member of the household?~~

~~Static Text, Modify, Mandatory~~

~~Prepopulate the primary member's Household Member evidence start date based on the active evidence.~~

~~Where the Person Lives Cluster:~~

~~8. Is the claimant a resident of Puerto Rico?~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the primary member's resident status from the active evidence. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~Race and Ethnicity Cluster:~~

~~9. Race~~

~~Checkboxes, Modify, Mandatory~~

~~Prepopulate these fields based on the active evidence. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~10. Ethnicity~~

~~Dropdown, Modify, Optional~~

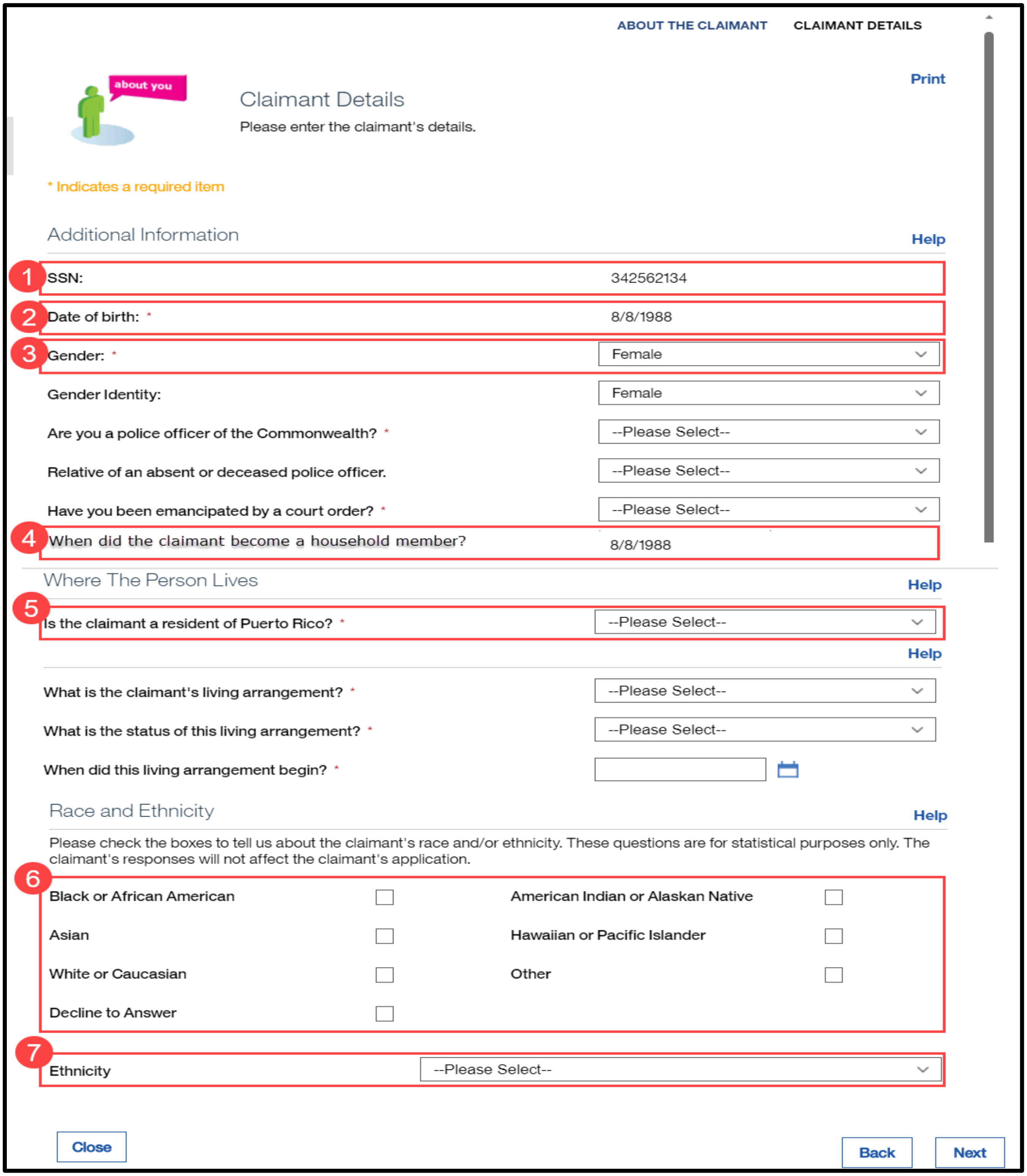
~~Prepopulate these fields based on the active evidence. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~5.1.6 Claimant Details Page (Opt. Out of Coverage)~~

~~The limited version of the Claimant Detail page will display if the caseworker answers "No" to "Does this person want to apply for health benefits?" on the previous page. This page will collect all the details needed from the claimant to be evaluated for Medical Assistance. This section will highlight the list of data elements that will be prepopulated by the system while filling out a new application from an IC.~~

~~5.1.6.1 Screenshot (Modify)~~

~~Figure 8: Claimant Details (opt out of Coverage)~~



~~5.1.6.2 Description of Modifications and Additions~~

~~Additional Information Cluster:~~

~~1. SSN:~~

~~Static Text, Modify, Mandatory~~

~~If the primary member's SSN is known and active, then display the primary member's SSN. When this field is prepopulated by the system, the caseworker is not allowed to update this field.~~

~~2. Date of birth:~~

~~Static Text, Modify, Mandatory~~

~~Prepopulate the primary member's date of birth. The caseworkers are not allowed to update this field.~~

~~3. Gender:~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the primary member's gender. This field can be updated. If a change is recorded, then save the updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~4. When did the claimant become a member of the household?~~

~~Static Text, Modify, Mandatory~~

~~Prepopulate the primary member's Household Member evidence start date. The caseworker is not allowed to update this field.~~

~~5. Is the claimant a resident of Puerto Rico?~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the primary member's resident status. This field can be updated. If a change is recorded, then save the updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~Race and Ethnicity Cluster:~~

~~6. Race~~

~~Checkboxes, Modify, Mandatory~~

~~Prepopulate these fields based on the active evidence. If a change is recorded, then save the updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~7. Ethnicity~~

~~Dropdown, Modify, Optional~~

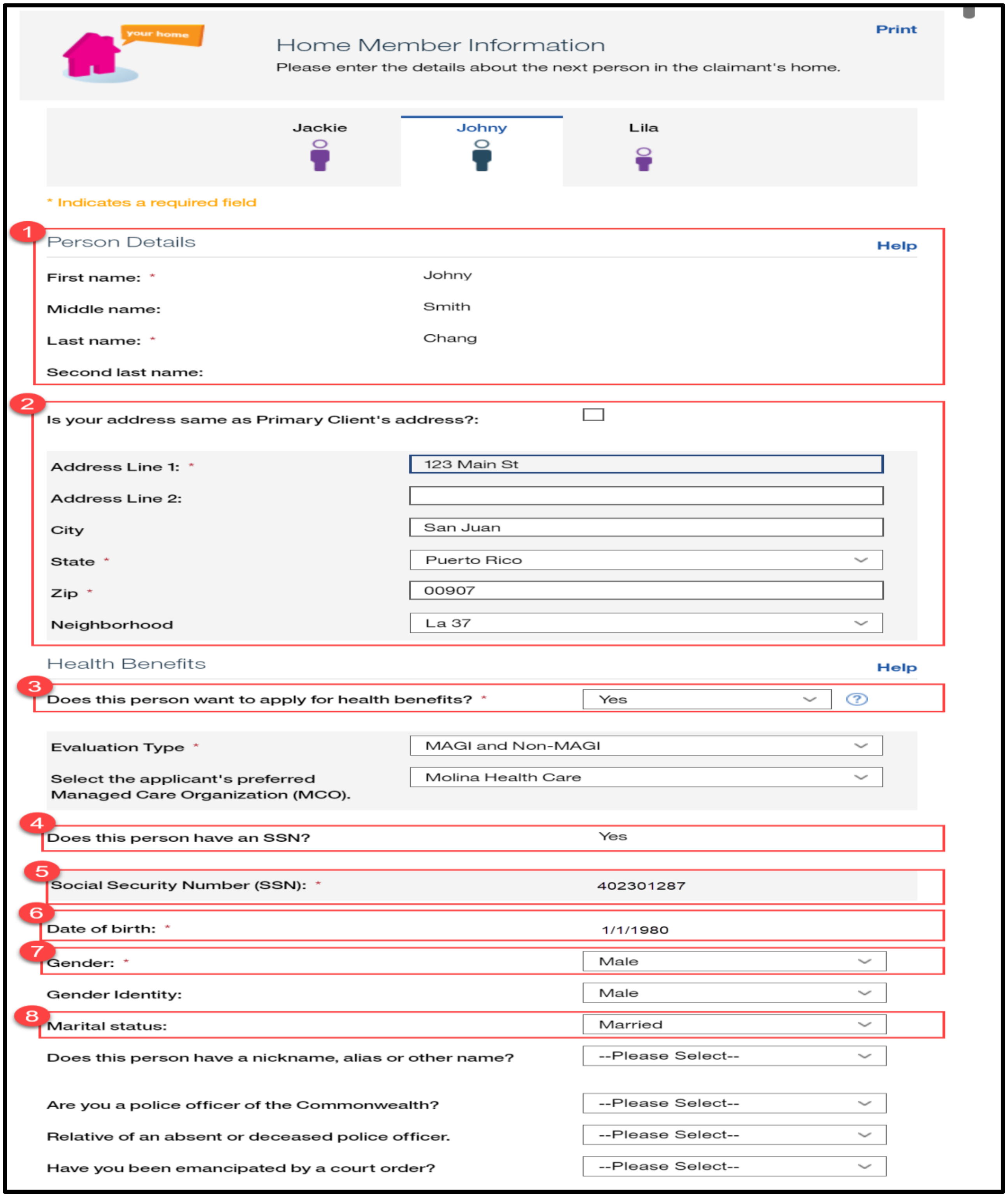
~~Prepopulate these fields based on the active evidence. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~5.1.7 Home Member Information~~

~~The Home Member Information allows the user to gather information regarding other members in the home. The same demographic information that was gathered for the primary member is also collected for each additional member on the integrated case. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.7.1 Screenshot (Modify)~~

~~Figure 9: Home Member Information (1)~~


your home
Home Member Information
Please enter the details about the next person in the claimant's home.
Print

Jackie | Johny | Lila

* Indicates a required field

1 Person Details — Help

First name: * Johny
Middle name: Smith
Last name: * Chang
Second last name:

2 Is your address same as Primary Client's address?:

Address Line 1: * 123 Main St
Address Line 2:
City: San Juan
State * Puerto Rico
Zip * 00907
Neighborhood: La 37

Health Benefits — Help

3 Does this person want to apply for health benefits? * Yes

Evaluation Type * MAGI and Non-MAGI
Select the applicant's preferred Managed Care Organization (MCO). Molina Health Care

4 Does this person have an SSN? Yes

5 Social Security Number (SSN): * 402301287

6 Date of birth: * 1/1/1980

7 Gender: * Male

Gender Identity: Male

8 Marital status: Married

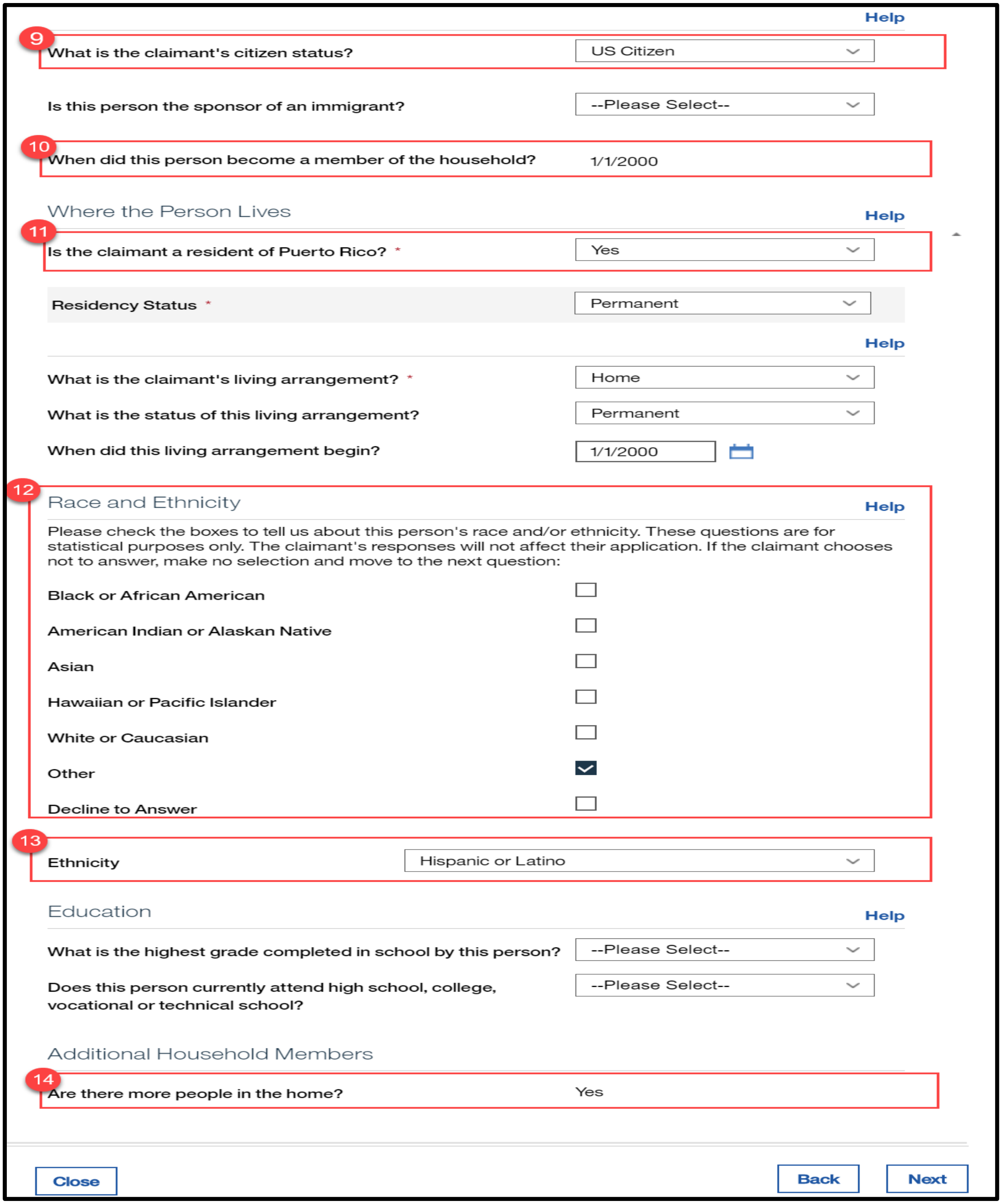
Does this person have a nickname, alias or other name? --Please Select--

Are you a police officer of the Commonwealth? --Please Select--

Relative of an absent or deceased police officer. --Please Select--

Have you been emancipated by a court order? --Please Select--

~~Figure 10: Home Member Information (2)~~



~~5.1.7.2 Description of Modifications and Additions~~

~~1. Name Cluster:~~

~~Static Text, Modify~~

~~Prepopulate the Name Cluster fields with the name of the active household member on the IC.~~

~~2. 'Is your address same as Primary Client's Address?'~~

~~Dropdown, Modify, Mandatory~~

~~If the primary member changed the prepopulated address information, as part of the IEG, and "Is your address same as Primary Client's address?" is set to true, then end date the existing private address evidence for the household member, using the day before the application date.~~

~~If the household member address information is entered, then end date the existing private address evidence for the household member, using the day before the application date.~~

~~Note: When the caseworker checks this box, then a new private address evidence is created as part of the Release 1 functionality. This modification is to end date the existing household member private address evidence.~~

~~3. Does this person want to apply for health benefits?~~

~~Dropdown, Modify, Mandatory~~

~~If the caseworker selects No, then set the applicant status to non-applicant. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~4. Does the claimant have an SSN?~~

~~Static Text, Modify, Mandatory~~

~~If the household member's SSN is known and active, then set the answer to Yes.~~

~~5. Social Security Number (SSN):~~

~~Static Text, Modify, Mandatory~~

~~Prepopulate the household member's SSN if known and active.~~

~~6. Date of birth:~~

~~Static text, Modify, Mandatory~~

~~Prepopulate the household member's date of birth based on the active evidence. When this field is prepopulated by the system, the caseworker is not allowed to update this field.~~

~~7. Gender:~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the household member's gender based on the active evidence. If a change is recorded, then save the updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~8. Marital Status:~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the household member's marital status. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~9. What is the claimant's citizen status?~~

~~Dropdown, Modify, Mandatory~~

~~If the existing active evidence indicates the household member is an US Citizen or US National, then prepopulate the primary member's citizen status. If a change is recorded, then save updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~10. When did this person become a member of the household?~~

~~Static text, Modify, Mandatory~~

~~Prepopulate the household member's Household Member evidence start date based on the active evidence. When this field is prepopulated by the system, the caseworker is not allowed to update this field.~~

~~Where the Person Lives Cluster:~~

~~11. Is the claimant a resident of Puerto Rico?~~

~~Dropdown, Modify, Mandatory~~

~~Prepopulate the household member's resident status from the active evidence. If a change is recorded, then save the updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~12. Race and Ethnicity Cluster:~~

~~Checkboxes, Modify, Mandatory~~

~~Prepopulate these fields based on the active evidence. If a change is recorded, then save the updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~13. Ethnicity~~

~~Dropdown, Modify, Optional~~

~~Prepopulate these fields based on the active evidence. If a change is recorded, then save the updated information to the corresponding evidence, using the application date as the effective date of change.~~

~~Additional Household Members Cluster:~~

~~14. Are there more people in the home?~~

~~Checkbox, Modify, Mandatory~~

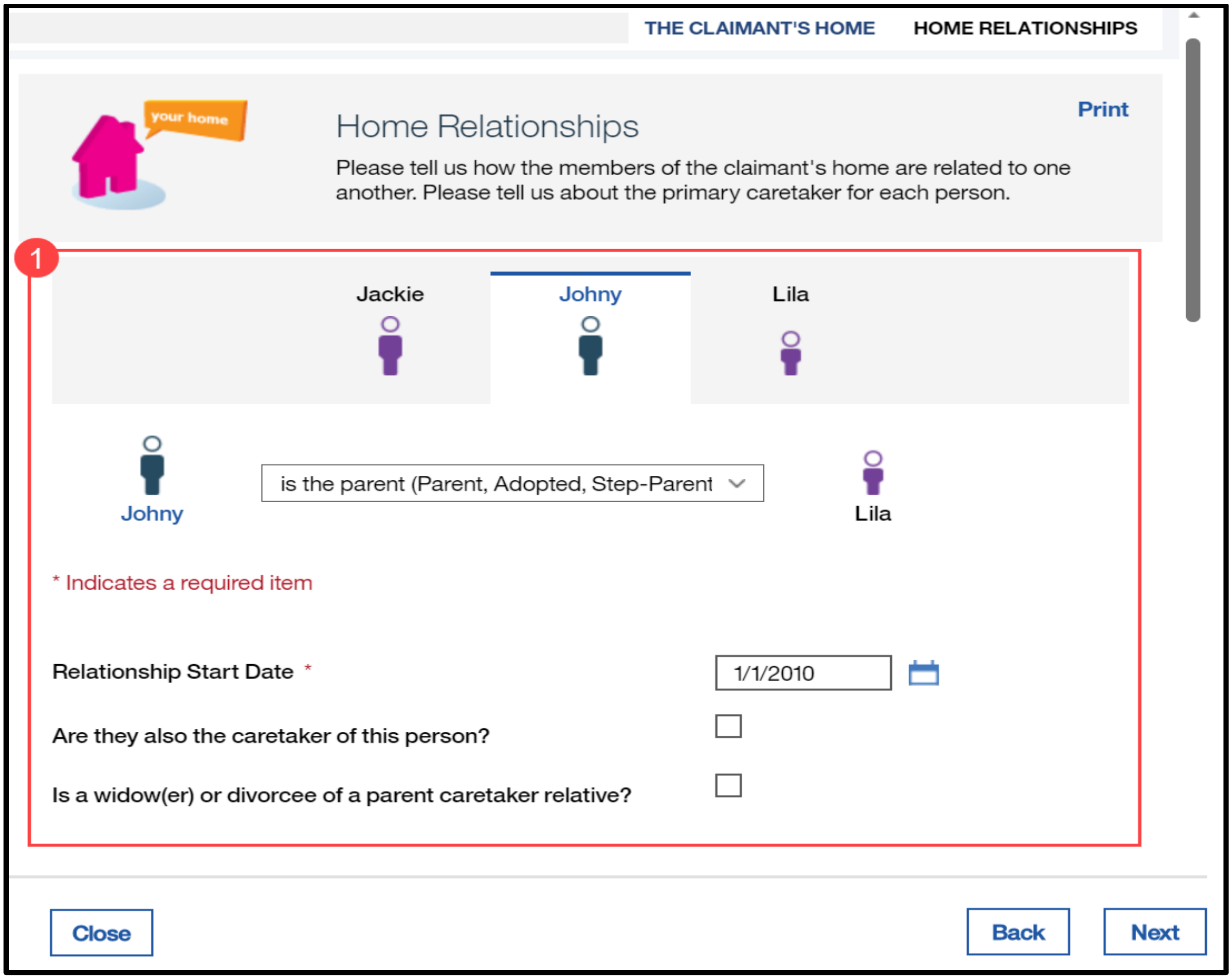
~~Set this checkbox to true if there is another active household member on the case. Once the last household member on the case Home Member Information page is displayed, the caseworker will be able to set the checkbox to true to add additional household members to the case.~~

~~5.1.8 Home Relationships~~

~~The Home Relationships page allows the user to enter the relationships between each of the home members. This section will highlight the list of data elements that will be prepopulated by the system while filling out a new application from an IC.~~

~~5.1.8.1 Screenshot (Modify)~~

~~Figure 11: Home Relationships~~



~~5.1.8.2 Description of Modifications and Additions~~

~~1. Home Relationships Page~~

~~Page, Modify, Mandatory~~

~~The home relationship between the applicants will be prepopulated when there is an active member relationship evidence. The caseworker can make changes to the home relationships. The changes will update Member Evidence as below:~~

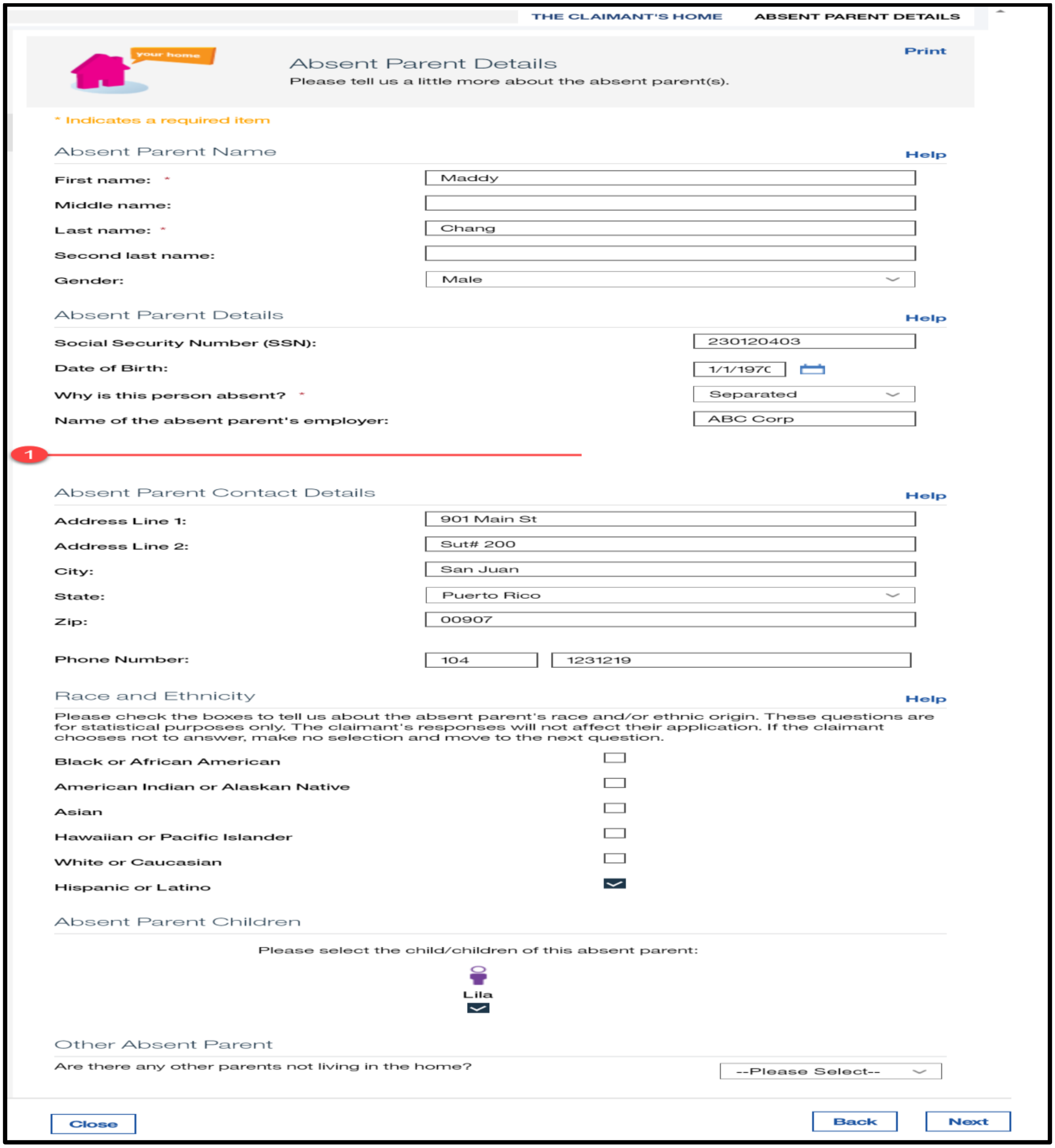
- ~~Existing member relationship evidence will be ended a day prior to the new relationship start date.~~
- ~~A new relationship record will be added with a start date as of the new relationship start date.~~

~~5.1.9 Absent Parent~~

~~The Absent Parent page allows the user to collect the information of the absent parent of the deemed newborn. This page is being modified to no longer ask about Child Support Payment since it is only counted as an unearned income.~~

~~5.1.9.1 Screenshot (Modify)~~

~~Figure 12: Absent Parent~~


THE CLAIMANT'S HOME | ABSENT PARENT DETAILS

your home

Absent Parent Details

Please tell us a little more about the absent parent(s).

Print

* Indicates a required item

Absent Parent Name — Help

First name: * Maddy

Middle name:

Last name: * Chang

Second last name:

Gender: Male

Absent Parent Details — Help

Social Security Number (SSN): 230120403

Date of Birth: 1/1/197C

Why is this person absent? * Separated

Name of the absent parent's employer: ABC Corp

1

Absent Parent Contact Details — Help

Address Line 1: 901 Main St

Address Line 2: Sut# 200

City: San Juan

State: Puerto Rico

Zip: 00907

Phone Number: 104 1231219

Race and Ethnicity — Help

Please check the boxes to tell us about the absent parent's race and/or ethnic origin. These questions are for statistical purposes only. The claimant's responses will not affect their application. If the claimant chooses not to answer, make no selection and move to the next question.

Black or African American

American Indian or Alaskan Native

Asian

Hawaiian or Pacific Islander

White or Caucasian

Hispanic or Latino

Absent Parent Children

Please select the child/children of this absent parent:

Lila

Other Absent Parent

Are there any other parents not living in the home? --Please Select--

Close | Back | Next

~~5.1.9.2 Description of Modifications and Additions~~

1. **~~Will the claimant help the child support enforcement begin/enforce a support order for each child?~~**

~~Dropdown, Remove~~

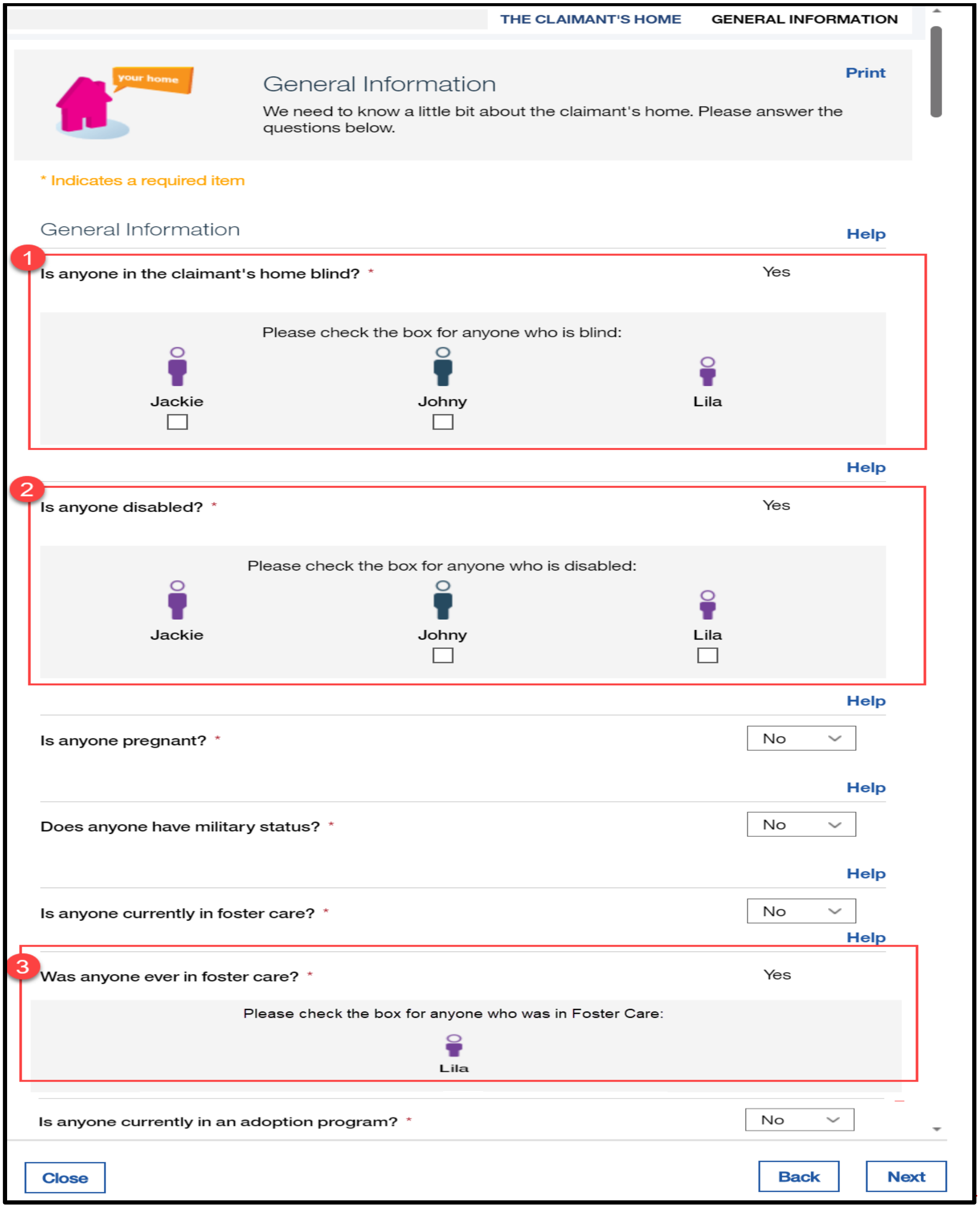
~~This questions within the Absent Parent Details page will be removed. Note that the Absent Parent Details will not be prepopulated by the system, however the question above is being removed because child support payment will be collected as an unearned income.~~

~~5.1.10 General Information~~

~~The General Information page collects general information about the claimant's household members, including if blindness, disability, and foster care are a factor. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.10.1 Screenshot (Modify)~~

~~Figure 13: General Information~~



~~5.1.10.2 Description of Modifications and Additions~~

~~1. Is anyone in the claimant's home blind?~~

~~Static Text/Dropdown, Modify, Mandatory~~

~~If the household member has an active blind disability evidence, then:~~

- ~~The question 'Is anyone in the Claimants home Blind?' will display the answer 'Yes' as static text.~~
- ~~The checkbox to prevent the selection of the avatar for that specific member will be disabled.~~
- ~~The system will prepopulate the blindness details on the upcoming blind details page.~~

~~If there are other household members that exist without an active blind disability evidence, then:~~

- ~~The system will display the dropdown box for the selection of a 'Yes' or 'No' answer for blindness.~~
- ~~The check box will be available for the selection of the avatar for each household member with no active blind disability evidence.~~
- ~~On the upcoming blind details page, the caseworker will be allowed to enter the details of the blindness.~~

~~2. Is anyone disabled?~~

~~Static Text/Dropdown, Modify, Mandatory~~

~~If the household member has an active disability evidence, then:~~

- ~~The question 'Is anyone disabled?' will display the answer 'Yes' as static text.~~
- ~~The checkbox to prevent the selection of the avatar for that specific member will be disabled.~~
- ~~The system will prepopulate the disability details page, prepopulate the disability details.~~

~~If there are other household members that exist without an active disability evidence, then:~~

- ~~The system will display the dropdown box for the selection of a 'Yes' or 'No' answer for blindness.~~
- ~~The check box will be available for the selection of the avatar for each household member with no active disability evidence.~~
- ~~On the upcoming disability details page, the caseworker will be allowed to enter the disability details.~~

~~3. Was anyone ever in foster care?~~

~~Static Text/Dropdown, Modify, Mandatory~~

~~If there is a household member under the age of 19 with an active former foster care evidence, then:~~

- ~~The system will display the answer 'Yes' as a static text to the question 'Was anyone ever in foster care?'.~~
- ~~The checkbox to prevent the selection of the avatar for that specific member will be disabled.~~
- ~~The system will prepopulate the former foster care details page on the upcoming the foster care details.~~

~~If there are other household members that exist without an active former foster care evidence, then:~~

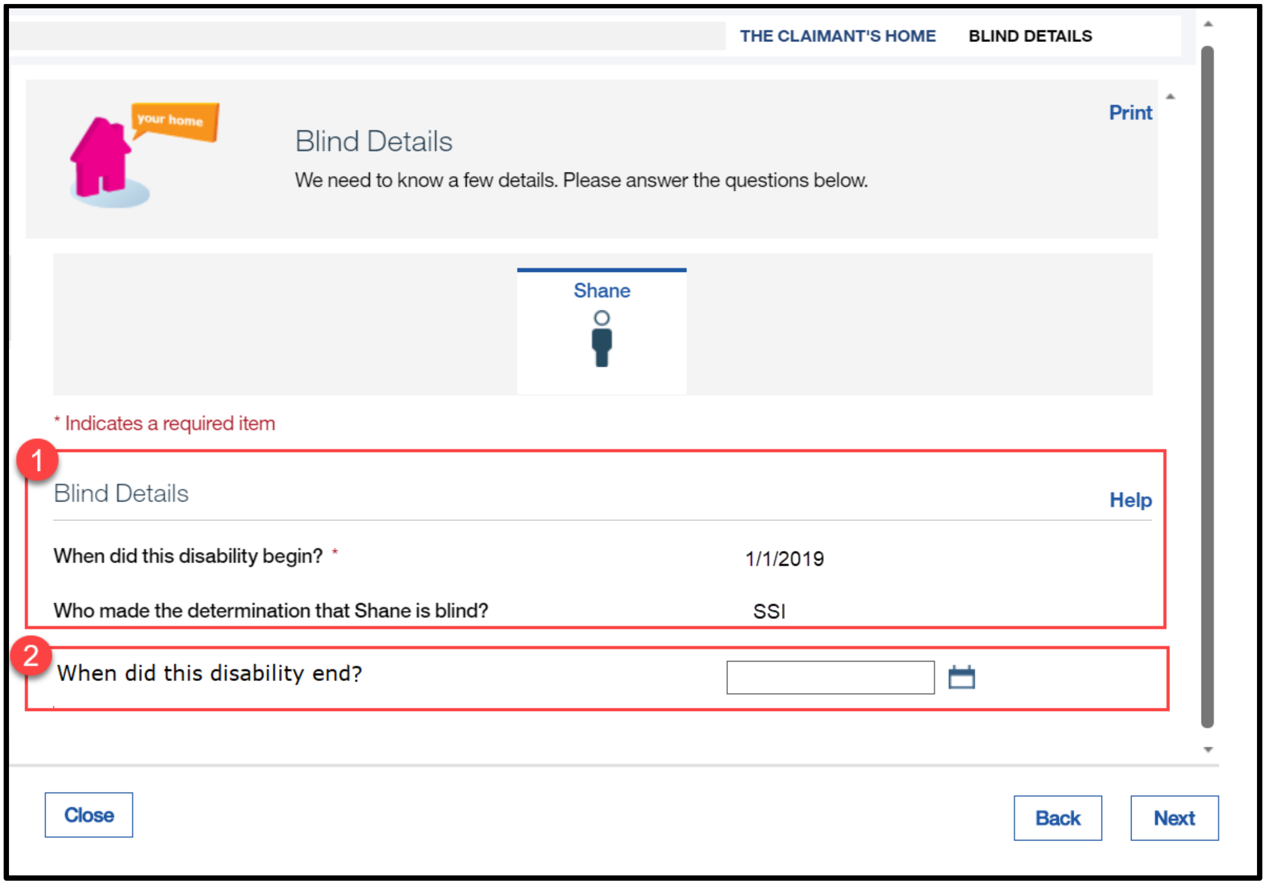
- ~~They system will display the dropdown box for the selection of the 'Yes' or 'No' answer for foster care.~~
- ~~The check box will be available for the selection of the avatar for each household member with no active disability evidence.~~
- ~~On the upcoming former foster care details page, the caseworker will be allowed to enter the foster care details.~~

~~5.1.11 Blind Details~~

~~The Blind Details page will allow the user to capture the blindness start and end dates as well as blindness determination body. This section will highlight the list of data elements that will be prepopulated by the system while filling out a new application from an IC.~~

~~5.1.11.1 Screenshot~~

~~Figure 14: Blind Details~~



~~5.1.11.2 Description of Modifications and Additions~~

~~1. Blind Details Page:~~

~~Static Text/Editable, Modify~~

~~If the household member has an active disability evidence of type Blind, then the system will:~~

- ~~Prepopulate the start date as a static text for the questions 'When did this disability begin'.~~
- ~~Prepopulate the answer in static text for the question 'Who made the determination that <Person Name> is blind?'.~~

~~If the household member does not have an active disability evidence, then the caseworker will view the editable version of this page as normal.~~

~~2. When did this disability end?~~

~~Date, New, Optional~~

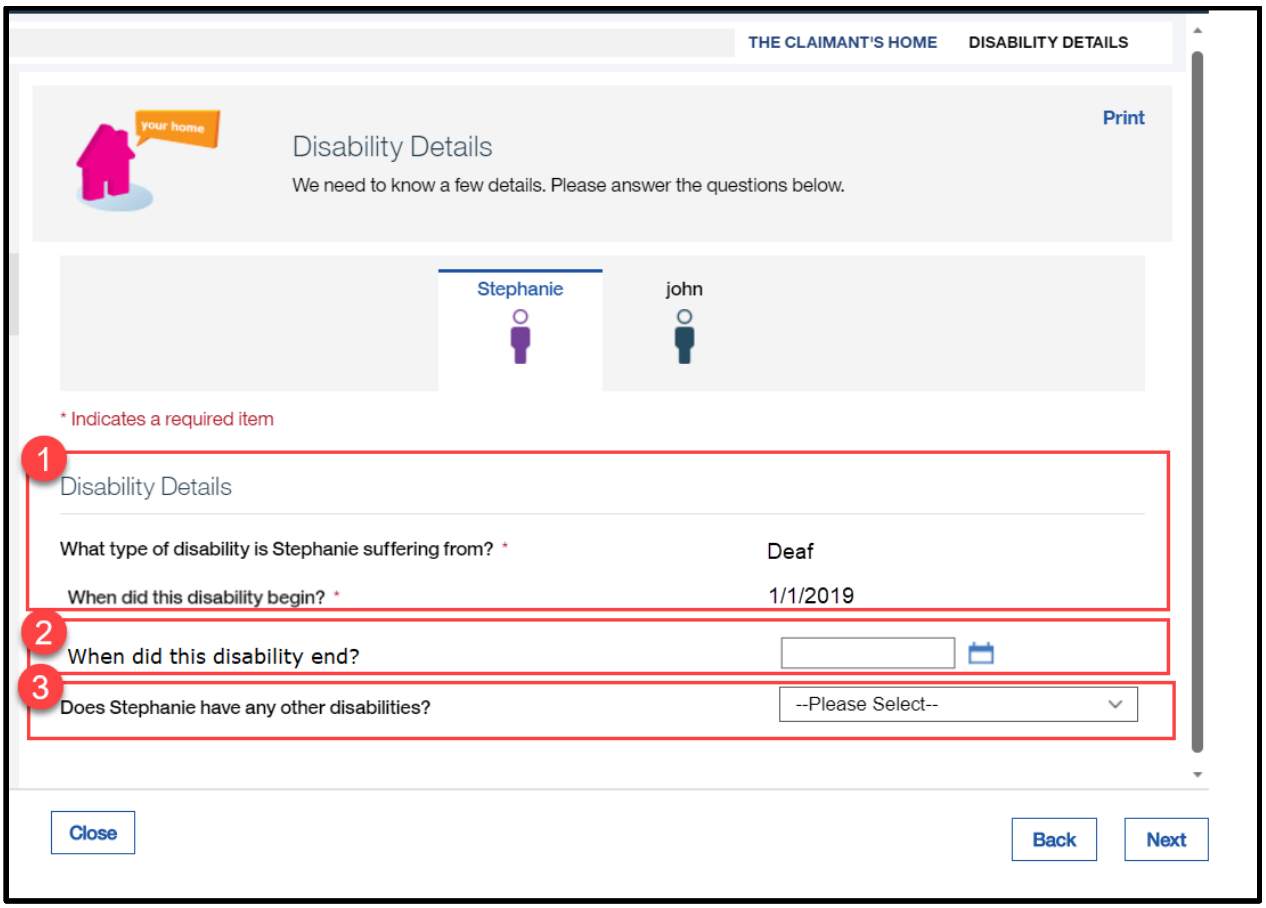
~~This field will be used to allow the caseworker to enter the disability (blind) end date. If an end date is recorded, then save the end date to the corresponding evidence.~~

~~5.1.12 Disability Details~~

~~The disability details page will allow the user to capture the disability details including disability type and disability start and end dates. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.12.1 Screenshot~~

~~Figure 15: Disability Details~~



~~5.1.12.2 Description of Modifications and Additions~~

~~1. Disability Details Page:~~

~~Static Text/Editable, Modify~~

~~If the household member has an active disability evidence, then the system will:~~

- ~~Prepopulate the disability type as a static text for the questions 'what type of disability is <person name> suffering from?'.~~
- ~~Prepopulate the disability start date as a static text for the question 'When did this disability begin?'.~~

~~If the household member does not have an active disability evidence, then the caseworker will view the editable version of this page as usual.~~

~~2. When did this disability end?~~

~~Date, New, Optional~~

~~This field will be used to allow the caseworker to enter the disability end date. If an end date is recorded, then the system will save the end date to the corresponding evidence.~~

~~3. Does <person name> have any other disabilities?~~

~~Static Text/dropdown, Modify, Optional~~

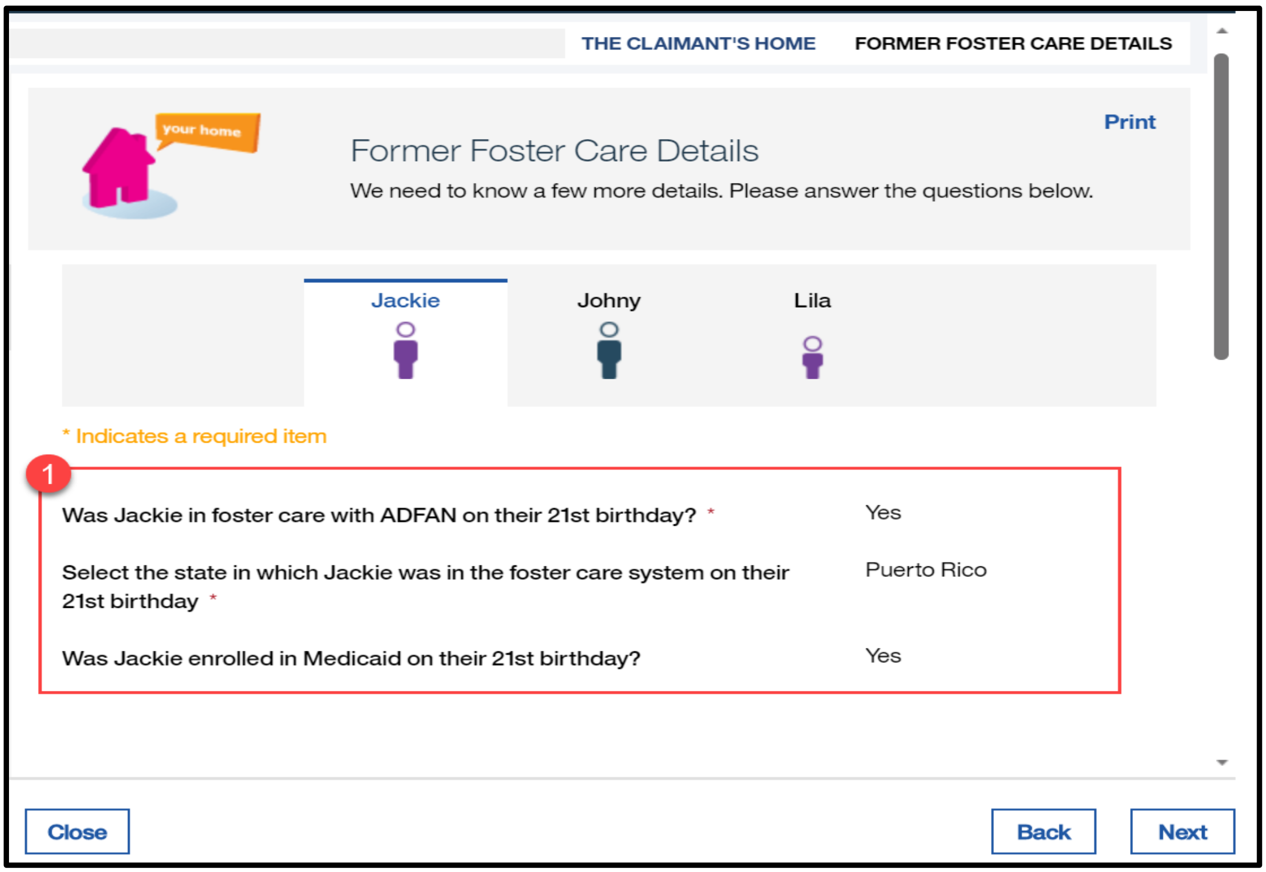
~~If the household member has another active disability evidence, then the system will prepopulate the answer Yes as a static text. If the household member does not have another active disability evidence, then the caseworker will view the question as a dropdown.~~

~~5.1.13 Former Foster Care Details~~

~~The Former Foster Care page will allow the user to capture the information about Former Foster Care. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.13.1 Screenshot~~

~~**Figure 16: Former Foster Care Details**~~



~~5.1.13.2 Description of Modifications and Additions~~

~~**Former Foster Care Details page:**~~

~~**1. Former Foster Care Details Cluster**~~

~~Static Text/Editable, Modify~~

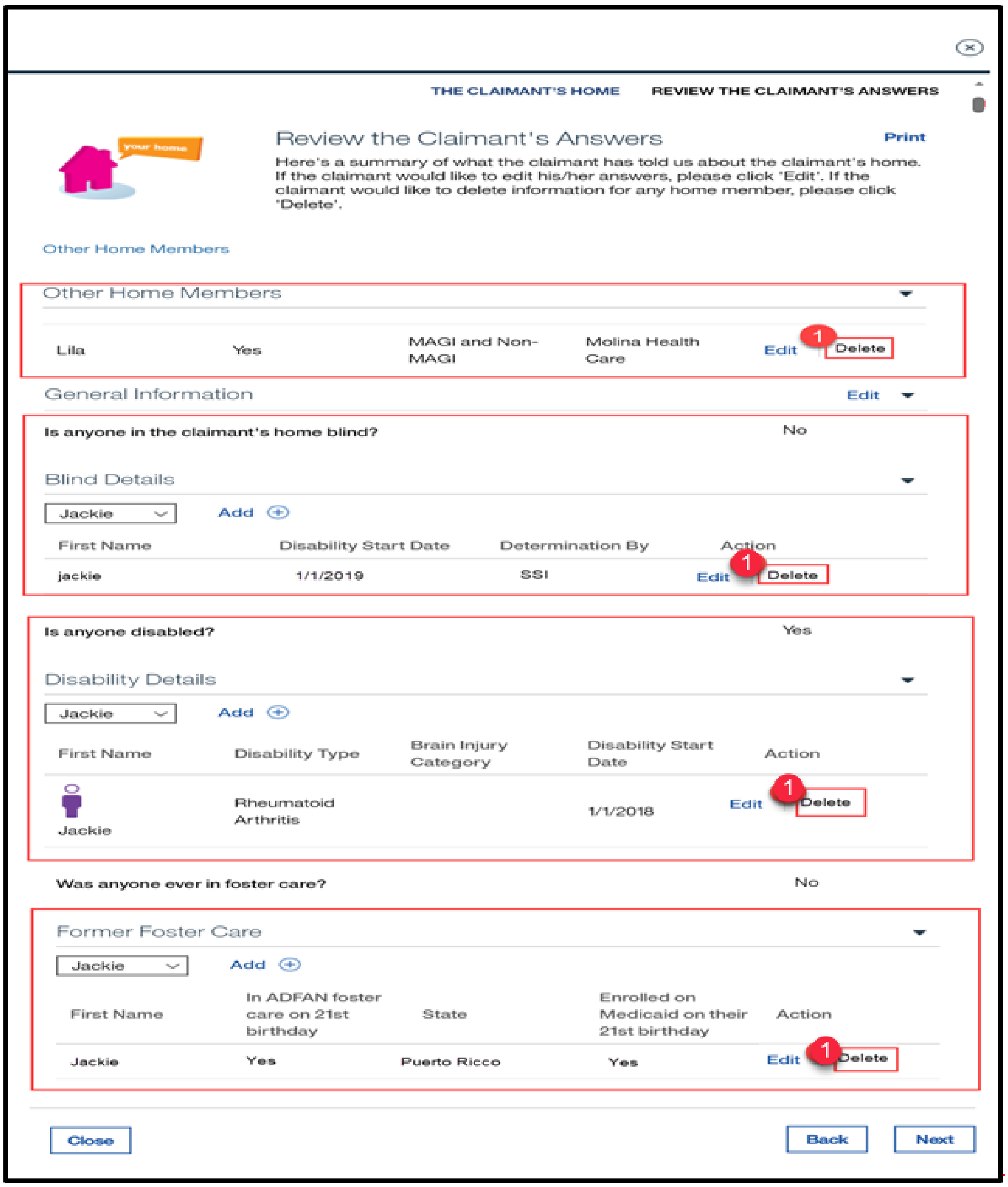
~~Former Foster Care details will be prepopulated only when there is an active evidence as a static text. If there is not an active evidence, then it will display the editable version.~~

~~5.1.14 Review the Claimant's Answers – The Claimant's Home~~

~~The Review Claimant's Answers – Claimant's Home page provides a summary to the user of information entered on the previous pages concerning the additional members in the home. The caseworker can review the data entered on the previous pages and fix any issues by returning to the page that contains the error before proceeding forward.~~

~~5.1.14.1 Screenshot~~

~~Figure 17: Review the Claimant's Answers – The Claimants Home~~



~~5.1.14.2 Description of Modifications and Additions~~

~~1. Delete link~~

~~Hyperlink, Modify, Disabled~~

~~For prepopulated entries, the Delete hyperlink will be disabled for the following details:~~

- ~~Other Home Members Cluster~~
- ~~Blind Details Cluster~~
- ~~Disability Details Cluster~~
- ~~Former Foster Care Details Cluster~~

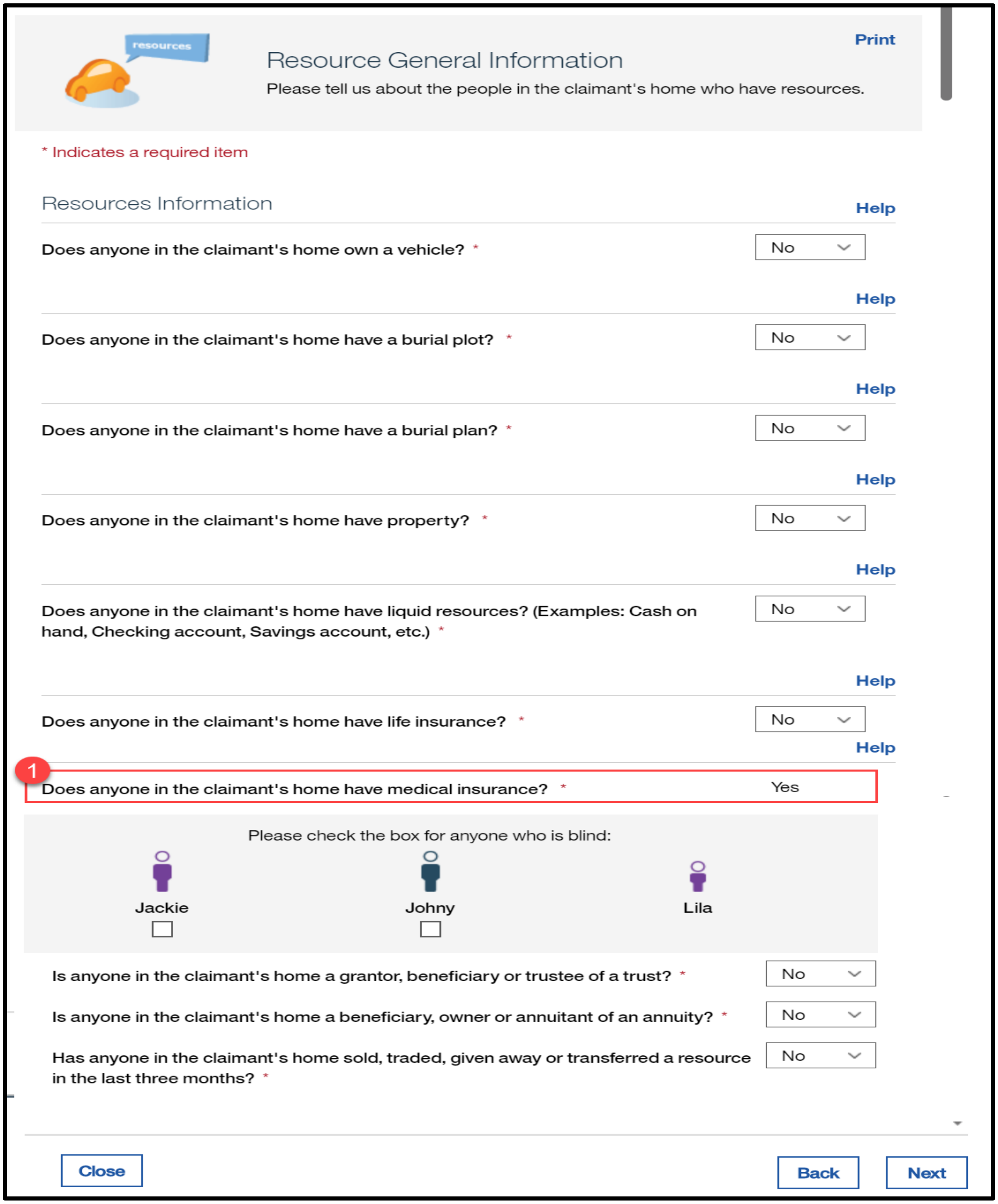
~~The Delete hyperlink will be available for new entries added via the application.~~

~~5.1.15 Resource General Information~~

~~The Resource Information page collects resource information about the claimant, including medical insurance. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.15.1 Screenshot (Modify)~~

~~Figure 18: Resource General Information~~



~~5.1.15.2 Description of Modifications and Additions~~

~~1. Does anyone in the claimant's home have medical insurance?~~

~~Static Text/dropdown, Modify, Mandatory~~

~~If the household member has an active Medical Insurance evidence, then:~~

- ~~Display the answer 'Yes' as a static text to the question 'Does anyone in the claimant's home have medical insurance?'.~~
- ~~Disable the checkbox to prevent the selection of the avatar for that specific member.~~
- ~~On the upcoming medical insurance page, prepopulate the medical insurance details.~~

~~If there are other household members that exist without an active medical insurance evidence, then:~~

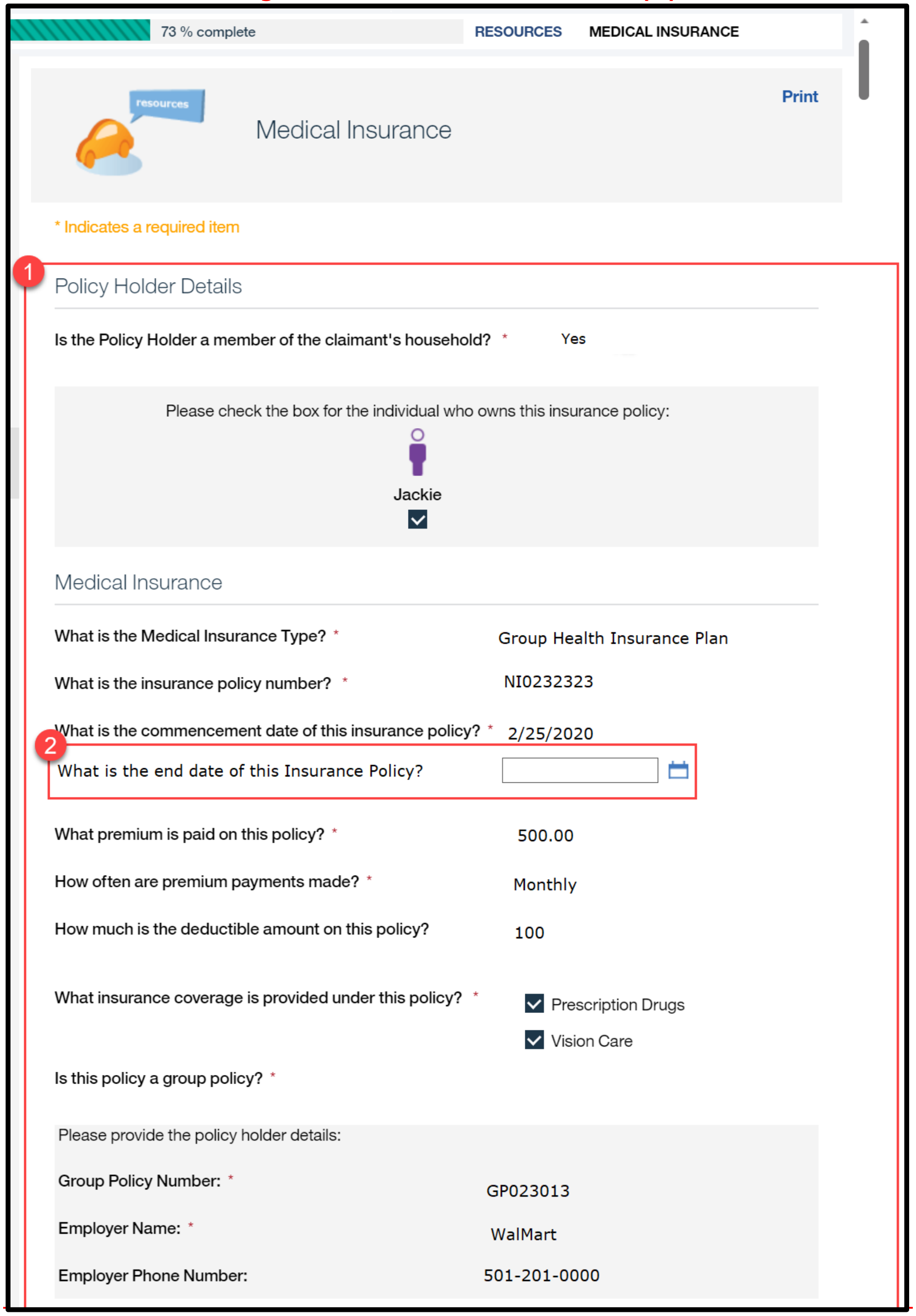
- ~~Display the dropdown box for selection of 'Yes' or 'No' answer for active medical insurance.~~
- ~~The check box will be available for selection of the avatar for each household member with no active medical insurance evidence.~~
- ~~On the upcoming medical insurance page, allow the user to enter the insurance details.~~

~~5.1.16 Medical Insurance~~

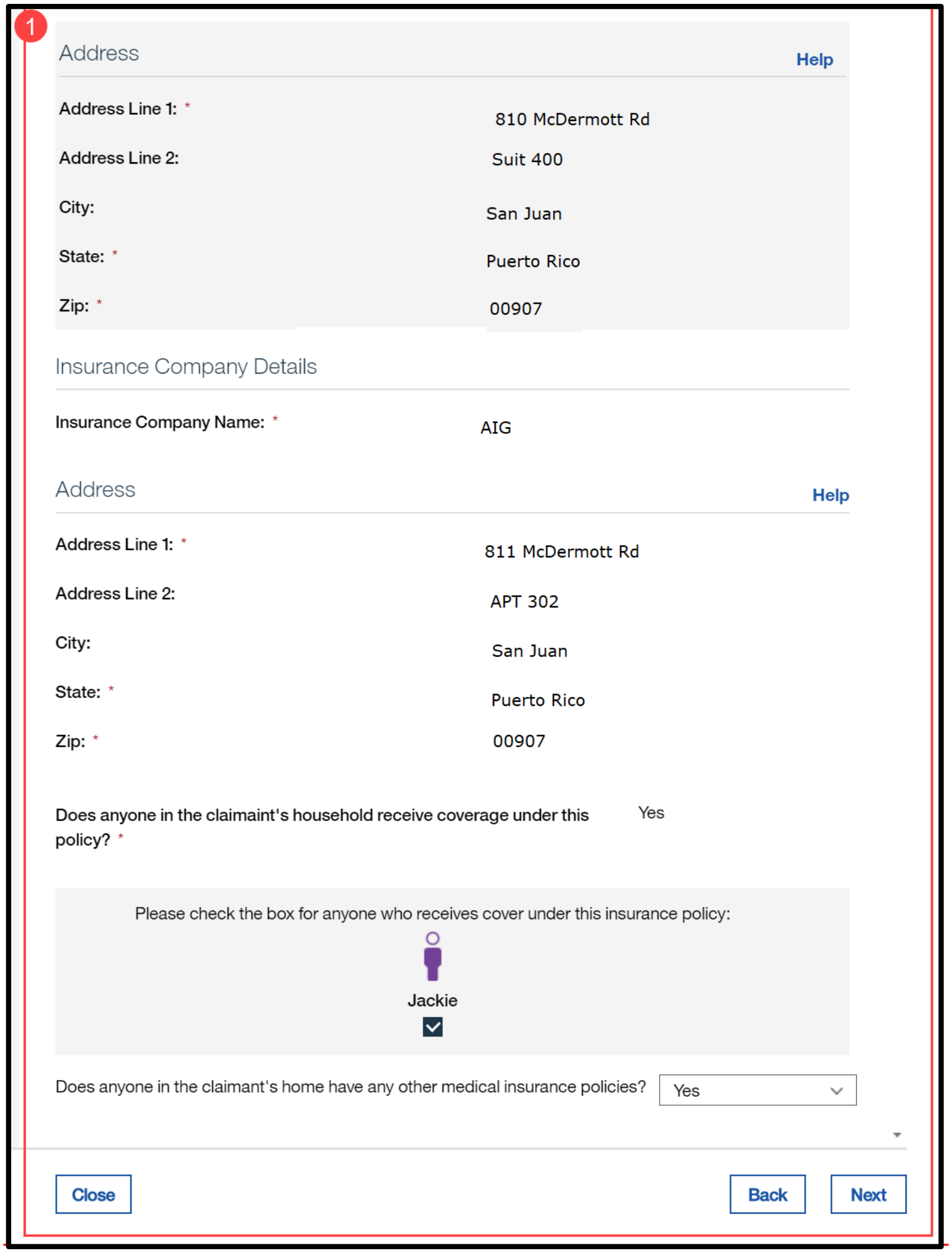
~~The Medical Insurance page allows the user to capture the Insurance Policy details including, policy holder name, type of provider, policy number, policy provider, Provider address etc. This section will highlight the list of data elements that will be prepopulated while filling out a new application from an IC.~~

~~5.1.16.1 Screenshot~~

~~Figure 19: Medical Insurance (1)~~



~~**Figure 20: Medical Insurance (2)**~~


1

Address | Help

Address Line 1: * 810 McDermott Rd
Address Line 2: Suit 400
City: San Juan
State: * Puerto Rico
Zip: * 00907

Insurance Company Details

Insurance Company Name: * AIG

Address | Help

Address Line 1: * 811 McDermott Rd
Address Line 2: APT 302
City: San Juan
State: * Puerto Rico
Zip: * 00907

Does anyone in the claimaint's household receive coverage under this policy? * Yes

Please check the box for anyone who receives cover under this insurance policy:

Jackie

Does anyone in the claimant's home have any other medical insurance policies? Yes

Close | Back | Next

~~5.1.16.2 Description of Modifications and Additions~~

~~1. Medical Insurance Page:~~

~~Static Text/Editable, Modify~~

~~Prepopulate the Medical Insurance page with active insurance coverage information from the IC as static text. If there is not an active evidence, then it will display the editable version.~~

~~2. What is the end date of this insurance?~~

~~Date, New, Optional~~

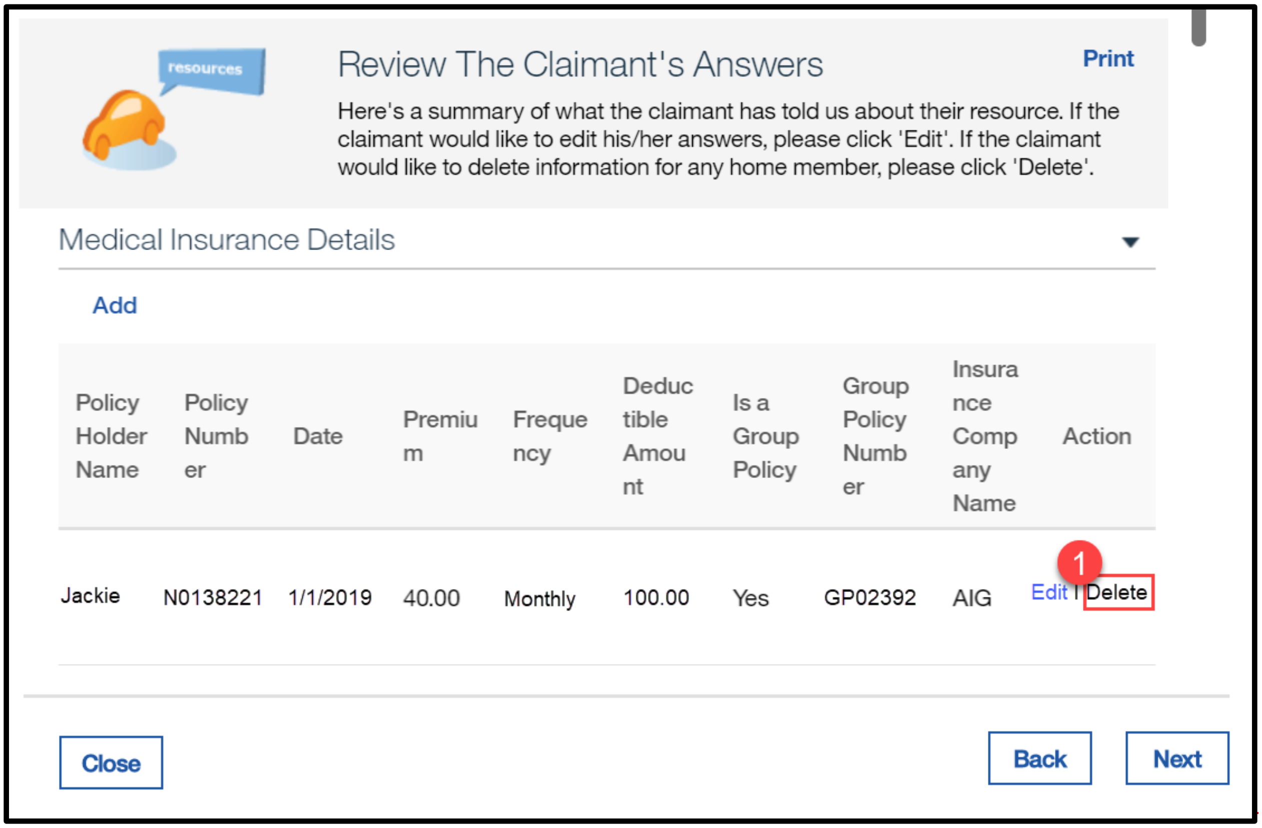
~~This field will be used to capture the end date of the insurance policy. If an end date is recorded, then save the end date to the corresponding evidence.~~

~~5.1.17 Review the Claimant's Answers – Medical Insurance~~

~~The "Review the Claimant's Answers" page in the "Medical Insurance" section represents the summary of the medical insurance policy details on the application.~~

~~5.1.17.1 Screenshots~~

~~Figure 21: Review the Claimant's Answers – Medical Insurance~~



~~5.1.17.2 Description of Modifications and Additions~~

~~1. Delete link~~

~~Static text/link, Modify~~

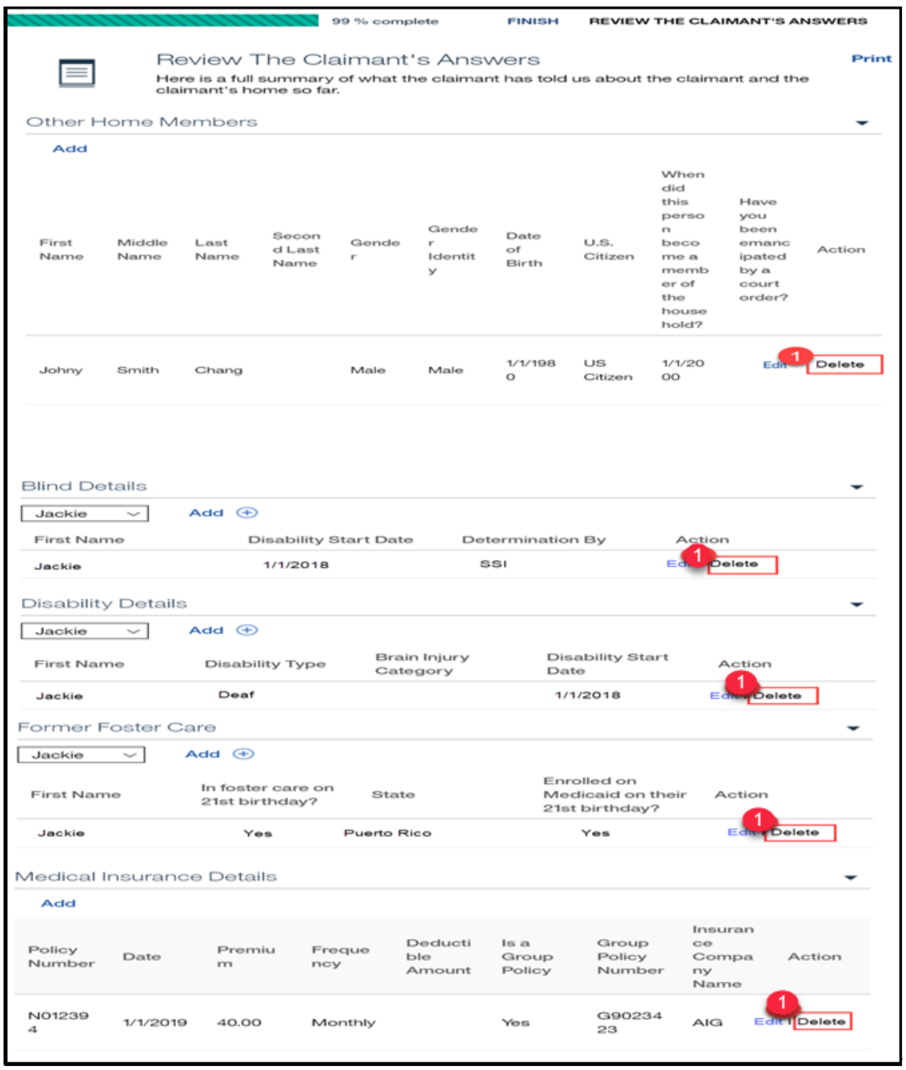
~~Hide the Delete option for prepopulated records.~~

~~5.1.18 Review Claimants Answers – Finish~~

~~The "Review the Claimant's Answers" page in the "Final" section represents the summary of all the questions, including the answers to the answered questions, on the application.~~

~~5.1.18.1 Screenshots~~

~~**Figure 22: Review Claimant's Answers – Finish**~~



~~5.1.18.2 Description of Modifications and Additions~~

~~1. Delete link~~

~~Static Text, Modify~~

~~For prepopulated items, the Delete hyperlink will not display for the following details:~~

- ~~Other Home Members~~
- ~~Blind Details Cluster~~
- ~~Disability Details Cluster~~
- ~~Former Foster Care Details Cluster~~
- ~~Medical Insurance~~

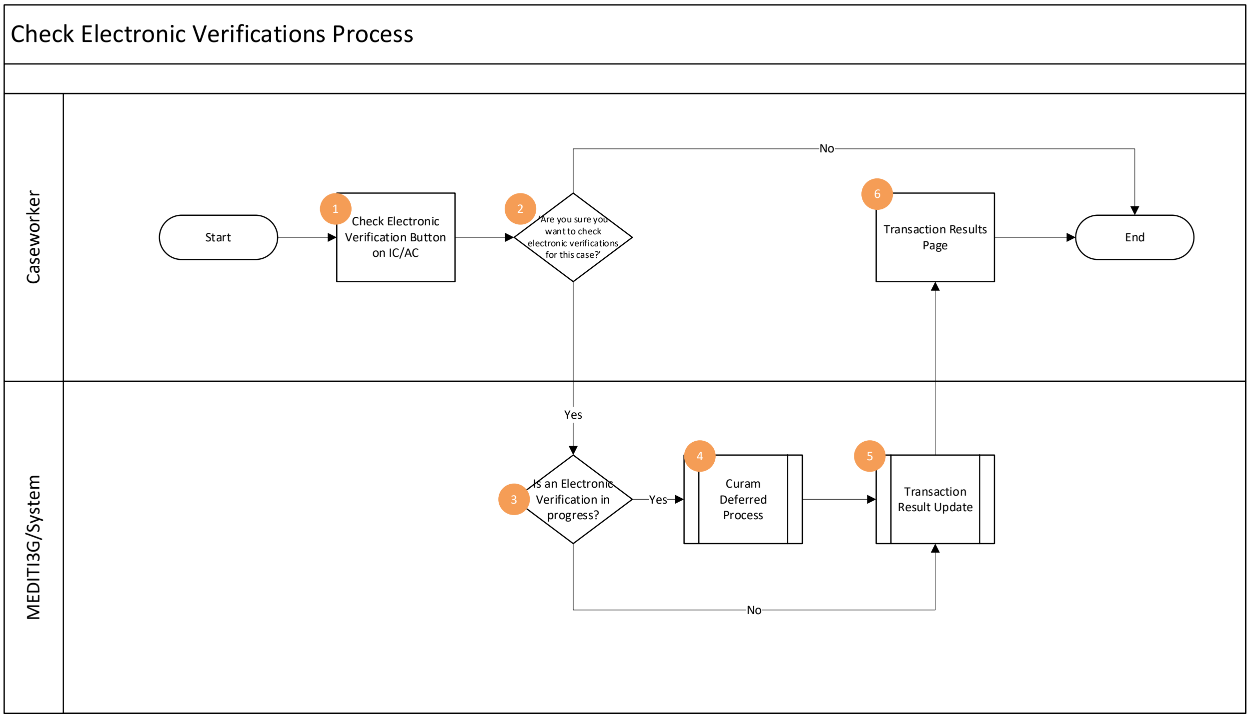
~~The Delete hyperlink will be available for new items added via the application.~~

5.2 <PRMO-1614> Check Electronic Verification

Currently, when the Check Electronic Verification is clicked, a pop-up screen will appear, and the caseworker must wait for the check to complete before closing the popup. When the popup displays the result, then the caseworker can close the screen and move on to the next step. However, with the increased number of interfaces, the wait time will also increase.

This page is modified and allowed to run behind the screen (Cúram Deferred Process). Caseworkers will be trained to refer to the Transaction Result page to determine if it is completed.

Figure 23 : Check Electronic Verification Process



5.2.1 Detailed Steps

1. Caseworker clicks on 'Check Electronic Verification' button on Application case OR Integrated case. Existing screen without any updates.
2. 'Are you sure you want to check electronic verifications for this case?' pop up appears. Caseworker clicks 'Yes' OR 'No'. Existing screen with modifications.
   - **YES**: Pop up closes and system verifies if there is already an electronic verification queued for this case.
   - **NO**: Pop up closes. Caseworker returns to IC or AC.
3. A new condition is developed in system if the check electronic method is already in progress.
   - **YES:** If an electronic verification is already queued, the system does not trigger any interface call. Proceed to Step 4.
   - **NO:** If no electronic verification is currently queued, interfaces are called as a backend process, proceed to Step 5.
4. System invokes Cúram Deferred process to call multiple interfaces as a backend process. Refer Developer Notes.
5. System updates Transaction Results. Refer IDD for more details.
6. Caseworker reviews transaction results. Refer IDD for more details.

5.2.2 Screenshot (Modify)

Figure 24: Check Electronic Verifications Pop up screen

5.2.2.1 Description of Modifications and Additions

1. Yes

Button, Modified

When the 'Yes' button is clicked

- System triggers the Cúram Deferred process if the process is not already in progress.
- Pop up window closes.

Developer Notes: *Currently the process that runs these interfaces is done as single transaction, the change is that after clicking the caseworker action button, system will trigger the Cúram Deferred process to call multiple interfaces.*

5.3 Auto Assessment and Authorization

PRMP has identified the need to automatically assess and authorize the eligibility determination identified on the application, change of circumstances, and renewal. The below subsection will provide the design details established to accomplish this on the application, change of circumstances, and renewal.

5.3.1 Application

When a caseworker has completed the application process, the caseworker will click on 'Authorize All'. By clicking on 'Authorize All', it will trigger PREE to assess each applicant. For those who are eligible, PREE will authorize their decision and activate the PDC, including predictable change(s). For those who are ineligible, PREE will deny their request for benefits. Note that when the caseworker clicks on 'Authorize

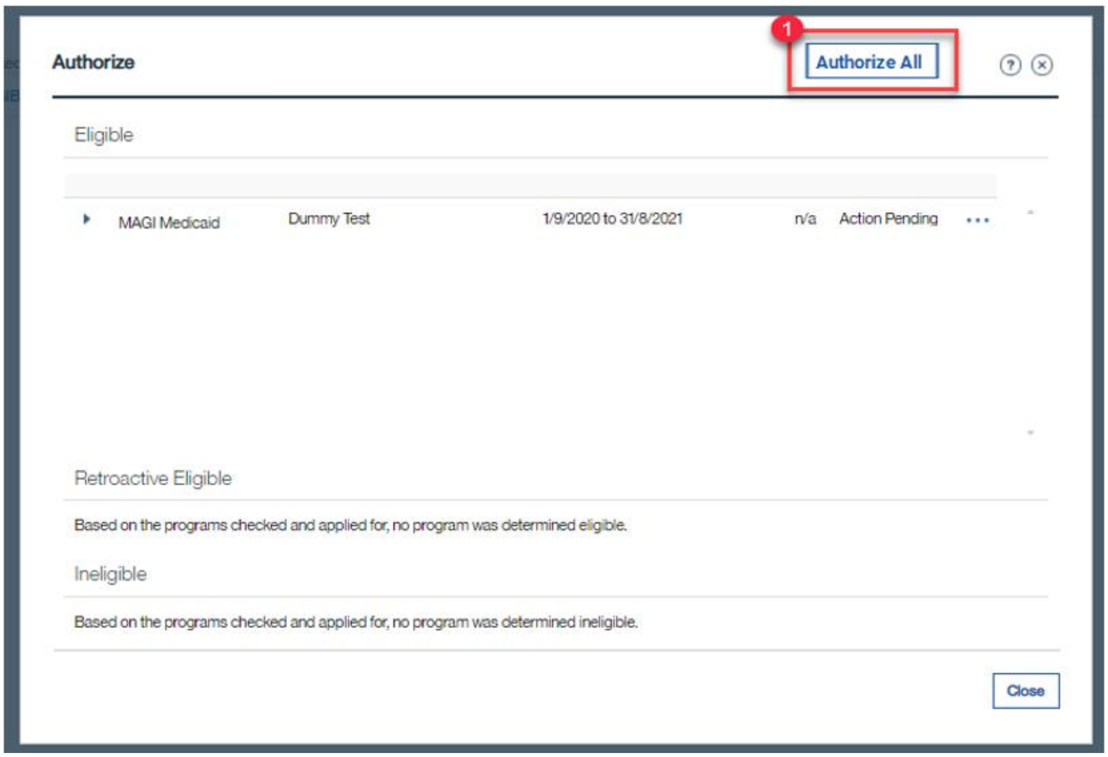
All', the completion time will vary per the number of applicants and decisions PREE will have to process.

5.3.1.1 <CR103> Authorize

A new button 'Authorize All' is being added to the Authorize page to allow caseworkers to authorize and activate all at once.

5.3.1.1.1 Screenshot (Modify)

Figure 25: Authorize <CR103>



5.3.1.1.2 Description of Modifications and Additions

1. Authorize All

Button, New

When the 'Authorize All' button is clicked, <CR103> display the 'Authorize All' confirmation pop-up page. ~~the PREE system will perform the following:~~

- ~~Check Eligibility for each applicant.~~
- ~~For the eligible applicants, authorize each decision, including predictable changes, and activate PDC generated by the authorized decision.~~
- ~~For the ineligible applicants, deny the decision.~~

- ~~For the applicants, whose decisions were not authorized/denied, then generate the <CR103> EW-Auto Assessment Issue Task - Application (New). The following is a list of issues that may occur:~~
  - ~~Unresolved issue records~~
  - ~~Unresolved prospect person~~
  - ~~In-edit evidences exist~~
  - ~~Applicant is already receiving benefits~~
  - ~~Unverified mandatory evidence~~

~~When the above is completed, then set the application status to be:~~

- ~~Disposed – when each applicant has an authorized decision with an active PDC or a denied decision~~
- ~~Ready for Determination – when an applicant has a decision that was not authorized/denied.~~

~~Note: While the process is running, the 'Authorize All' button will be greyed out.~~

~~2. Authorize~~

~~Link, Modify~~

~~When the 'Authorize' link is clicked, the PREE system will perform the following:~~

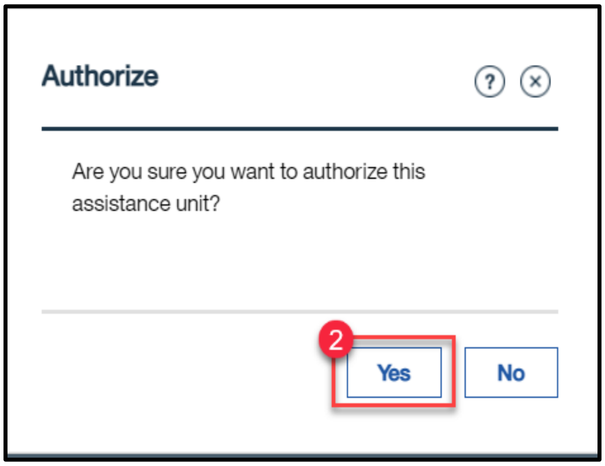
- ~~Check Eligibility for the selected applicant~~
- ~~Authorize each decision, including predictable changes~~
- ~~Activate PDC generated by the authorized decision(s).~~

5.3.1.2 <CR103> Authorize (Confirmation Popup)

The Authorize confirmation popup page will prompt the worker to accept or decline the authorization request.

5.3.1.2.1 Screenshot (Modify)

Figure 26: Authorize



5.3.1.2.2 Description of Modifications and Additions

2. Yes

Button, Modify

When the 'Yes' button is clicked, the system will perform the following:

For each unverified evidence, determine if the applicant is a Verification Dependent. See **Error! Reference source not found.**in the Case Management FDD to determine if the applicant is a Verification Dependent.

IF the applicant is a Verification Dependent, **THEN** display the following error message: <Person Name> benefit cannot be authorized until *<Evidence Owner Name> - <Evidence Name> is verified.*

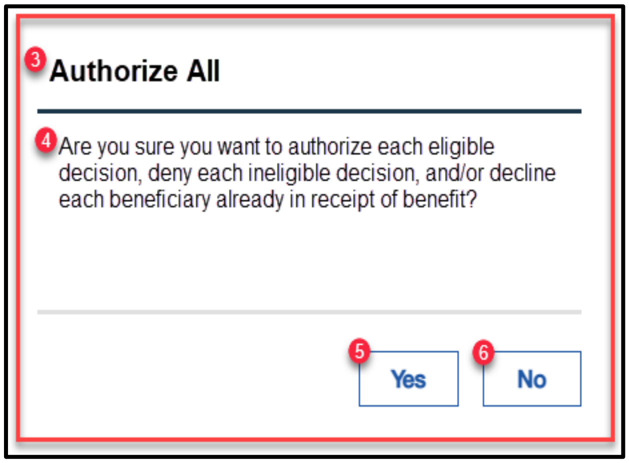
ELSE preform the remaining OOTB validation. If there's no issue, then authorize the decision and activate the PDC.

5.3.1.3 <CR103> Authorize All (Confirmation Popup)

The Authorize All confirmation popup page will prompt the worker to accept or decline the authorization request.

5.3.1.3.1 Screenshot (Modify)

Figure 27: Authorize All



5.3.1.3.2 Description of Modifications and Additions

3. Authorize All

Static Text, New

When the ‘Authorize All’ button is clicked, display a confirmation pop-up page with the title set to ‘Authorize All’.

4. Authorize All Confirmation Message

Static Text, New

When the ‘Authorize All’ button is clicked, display a confirmation pop-up page with the following message:

> Are you sure you want to authorize each eligible decision, deny each ineligible decision, and/or decline each beneficiary already in receipt of benefit?

5. Yes

Button, New

When the ‘Yes’ button is clicked on the ‘Authorize All’ pop-up page, then the system will perform the following:

- For each beneficiary, decline decision with reason ‘Already In Receipt’.
- For each eligible decision, preform the same functionality as the ‘Authorize’ button
- For each ineligible decision, deny benefit
- For each eligible Retroactive Medical Assistance decision, preform the same functionality as the ‘Authorize’ button

If an issue is found along the way, stop the process and display the appropriate error message. When the 'Yes' button is clicked again, restart the process.

6. No

Button, New

When the 'No' button is clicked close the pop-up.

5.3.2 Change of Circumstances

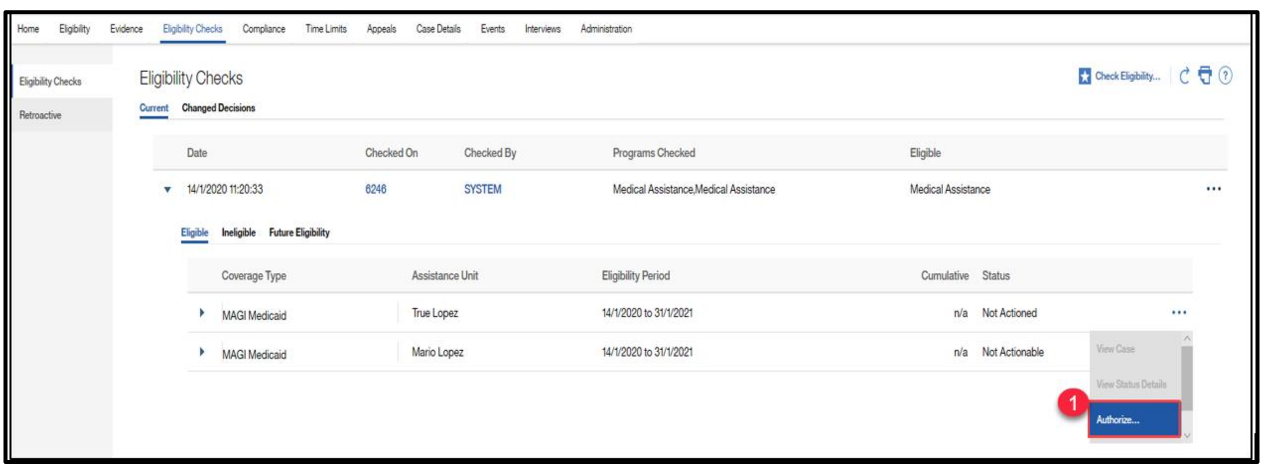
When a new evidence is activated in PREE, each member with the 'Applicant' indicator checked is reassessed. PREE is being modified to reassess each of these members and provide them with the best coverage possible based on the current active evidence. For example, if the member has coverage of State and the change reported makes the member eligible for Modified Adjusted Gross Income (MAGI), PREE will terminate the member's State coverage and authorize the MAGI coverage.

5.3.2.1 <CR103> Eligibility Checks - Current

The Authorize link on the Current tab within Eligibility Checks is being modified to prevent authorization of benefit if there is an unverified evidence that the person is Verification Dependent. See **Error! Reference source not found.**in the Case Management FDD to determine if the person is a Verification Dependent.

5.3.2.1.1 Screenshot (Modify)

Figure 28: Current



5.3.2.1.2 Description of Modifications and Additions

1. Authorize

Link, Modify

When the Authorize link is clicked, for each unverified evidence, determine if the person is a Verification Dependent. See **Error! Reference source not found.**in the Case Management FDD to determine if the person is a Verification Dependent.

IF the person is a Verification Dependent, **THEN** display the following error message: <Person Name> benefit cannot be authorized until *<Evidence Owner Name> - <Evidence Name> is verified.*

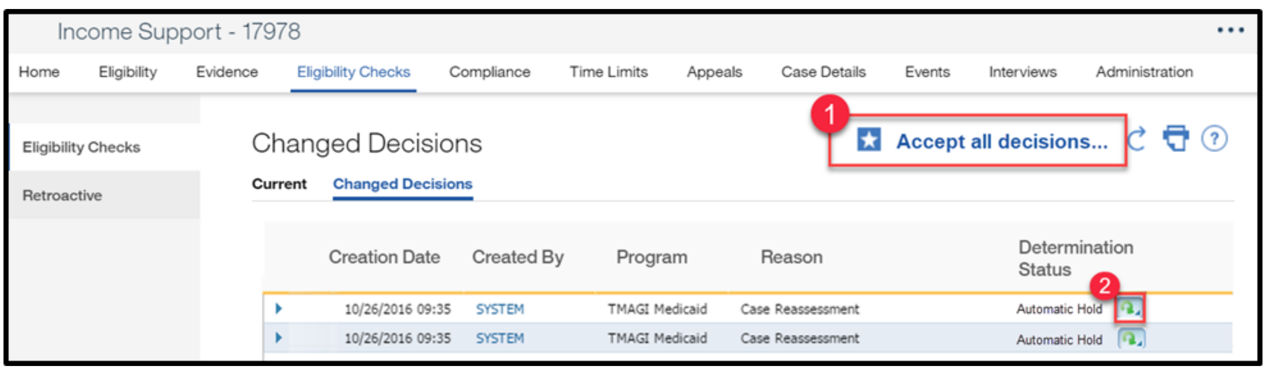
ELSE procced as usual

5.3.2.2 <CR103> Eligibility Checks - Changed Decisions

The 'Accept all decisions…' button is being added to the Changed Decisions page to allow caseworker to accept all changes at once.

5.3.2.2.1 Screenshot (Modify)

Figure 29: Changed Decisions



5.3.2.2.2 Description of Modifications and Additions

1. Accept all decisions…

Button, New

Display the Accept all decisions button when there are change decisions on hold. When the Accept all decisions button is clicked, each case will go through the following process:

> Each case will be reassessed for all coverages. <CR103> ~~If the member is eligible for a coverage higher on the hierarchy compared to the current coverage, then close the current coverage's PDC with reason "Change of Coverage" as of the acceptance date, authorize the new decisions, and~~

~~activate the PDC. If the member is eligible for a coverage lower on the hierarchy compared to the current coverage, then close the current coverage's PDC with the applicable reason and closure date per Adverse Action, authorize the new decisions, and activate the PDC. Any predictable change(s) will also be authorized and their PDCs will be activated.~~

For recipients eligible for a coverage higher on the hierarchy than the current coverage, then

- Close the current coverage's PDC with reason "Change of Coverage" as of the acceptance date
- Authorize the new decision
- Activate new PDC

For recipients ineligible for current coverage and eligible for another coverage, then

- Current coverage will end as determined in the Case Management FDD for negative decisions
- Authorize the new decision to begin the day after the current coverage ends
- Activate new PDC

Note that when the PDC remains the same, but the Coverage Code changes, it will continue to follow the same process as described in the Case Management FDD for positive and negative decisions.

Note that when the member is ineligible, it will continue to follow the same process as described in the Case Management FDD for negative decisions.

~~While the process is running, the Accept all decisions button and the Accept button will be greyed out.~~

~~For members whose decisions were not authorized/accepted, then generate the <CR103> EW-Auto Assessment Issue Task - Application (New)~~

~~When the system performs an auto assessment of an application, such as when a caseworker selects 'Authorize All', an issue can occur. When an issue occurs, this notification will be generated to provide details about the issue.~~

~~Table 8: Auto Assessment Issue Task - Application~~

~~Task — Notification Name: Auto Assessment Issue Task - Application~~
~~**Purpose:** To notify the caseworker an issue occurred when attempting to auto assess an application.~~
~~**Trigger(s):** When Auto Assessment process for application was completed (triggered by 'Authorize All' button), but the application was not disposed.~~

~~Category~~ Task Type	~~Application Renewal COC Other Interface~~	
~~Allocation Type~~	~~Caseworker Position Job Org Unit Queue~~	
~~Allocation Strategy~~	~~To the caseworker who clicked on 'Ready for Determination'. If 'Ready for Determination' status was set by the PREE system, then based on the Primary Applicant's physical address, the task will be routed to the regional work queue associated with the region the physical address belongs to.~~ ~~Queue options are:~~ ▪ ~~Arecibo~~ ▪ ~~Bayamón~~ ▪ ~~Caguas~~ ▪ ~~Mayaguez~~ ▪ ~~Ponce~~ ▪ ~~Metropolitana~~ ▪ ~~Fajardo~~ ~~If the physical address is not in Puerto Rico, assign to any random queue.~~	
~~Links~~	~~Link~~	~~Yes No~~
	~~Primary Action Link~~	~~None~~
	~~Supporting Information Link~~	~~Application Home~~
~~Subject~~	~~Subject Text~~	~~Auto assessment of application <Application #> was unsuccessful~~
~~Task Details~~	~~Deadline Strategy~~	~~Yes No~~
	~~Deadline Strategy Details~~	~~N/A~~
	~~Escalation Strategy~~	~~N/A – No escalation strategy identified for this notification~~
	~~Deadline Override Allowed~~	~~Yes No~~

	~~Task Priority~~	~~Low Medium High~~
	~~Manual Forwarding Allowed~~	~~Yes No~~

~~Task/Notification Body Details~~	~~Message Body Text~~	~~Auto assessment of application <Application link> was unsuccessful due to the following reason:~~ • ~~<List all the appropriate snippets>~~ ~~Possible snippets:~~ • ~~When there is an in-edit evidence, then add snippet: <System error message when there is in-edit evidence>~~ • ~~When there is an unresolved prospect person, then add snippet: <System error message when there is a prospect person>~~ • ~~When there is an unresolved issue, then add snippet: Please resolve the Issue record.~~ • ~~When there is an applicant already receiving benefits, then add snippet: <Applicant Name> - <System error message when receiving benefits on another case>~~ • ~~When there is an applicant with unverified mandatory evidence, then add snippet: <Applicant Name> - <System error message when PDC cannot be activated due to unverified mandatory evidence>~~ • ~~When issue is unknown for an applicant, then then add snippet: <Applicant Name> - An unexpected error occurred. Please review the case and try again.~~

~~Other special processing instructions:~~

<CR103> ~~Auto Assessment Issue Task - COC (New). The following is a list of potential issues the system will generate:~~

- ~~Unresolved issue records~~
- ~~Unresolved prospect person~~
- ~~Applicant is already receiving benefits~~
- ~~Unverified mandatory evidence~~

2. Accept

Link, New

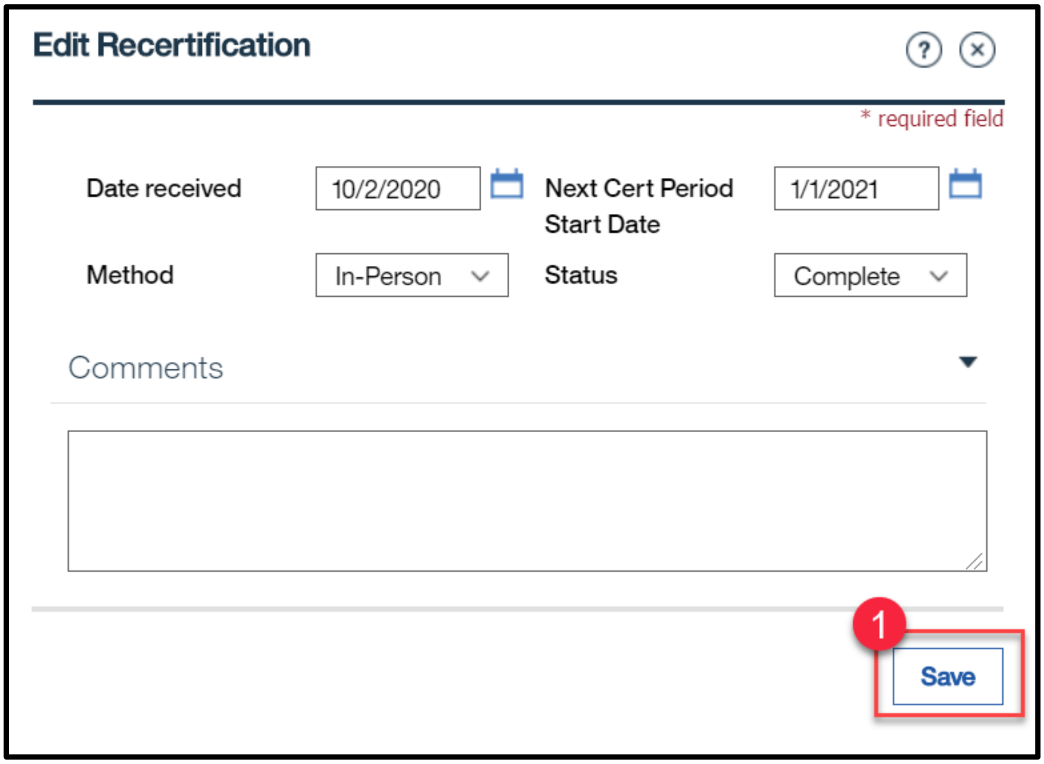
When the Accept button is clicked, the same process detailed above will be performed only for the beneficiary of the record. Note that the nightly process that accepts decisions left on on-hold will also perform the same process detailed above.

5.3.3 Recertification

When a caseworker sets the Recertification record to Complete, PREE already reassesses the beneficiary case. However, any new decision is not automatically authorized. The Save button is being modified to be the trigger to authorize any new decisions and activate the PDC, including predictable change(s). The caseworker will need to complete this process for each beneficiary undergoing renewal.

5.3.3.1 Screenshot (Modify)

Figure 30: Edit Recertification



5.3.3.2 Description of Modifications and Additions

1. Save

Button, Modify

When the Status is set to Complete and the Save button is clicked, **IF** the beneficiary is still eligible <CR103> **AND** there is unverified evidence, **THEN** for each unverified evidence, determine if the person is a Verification Dependent for each category the person is eligible for. See Verification Dependent Check Process in the Case Management FDD to determine if the person is a Verification Dependent.

IF the person is a Verification Dependent, **THEN** display the following error message: <Person Name> benefit cannot be authorized until *<Evidence Owner Name> - <Evidence Name> is verified.*

ELSE authorize any new decisions and activate the PDC, including predictable change(s), if applicable.

Note that if the beneficiary was renewed for the same program, then there will not be any new PDC to activate.

~~If the PDC could not be activated due to unverified evidence, then set status to Pending Verification and display the error message "<Evidence Name> must be verified in order to activate the PDC."~~

5.4 New Task Pages

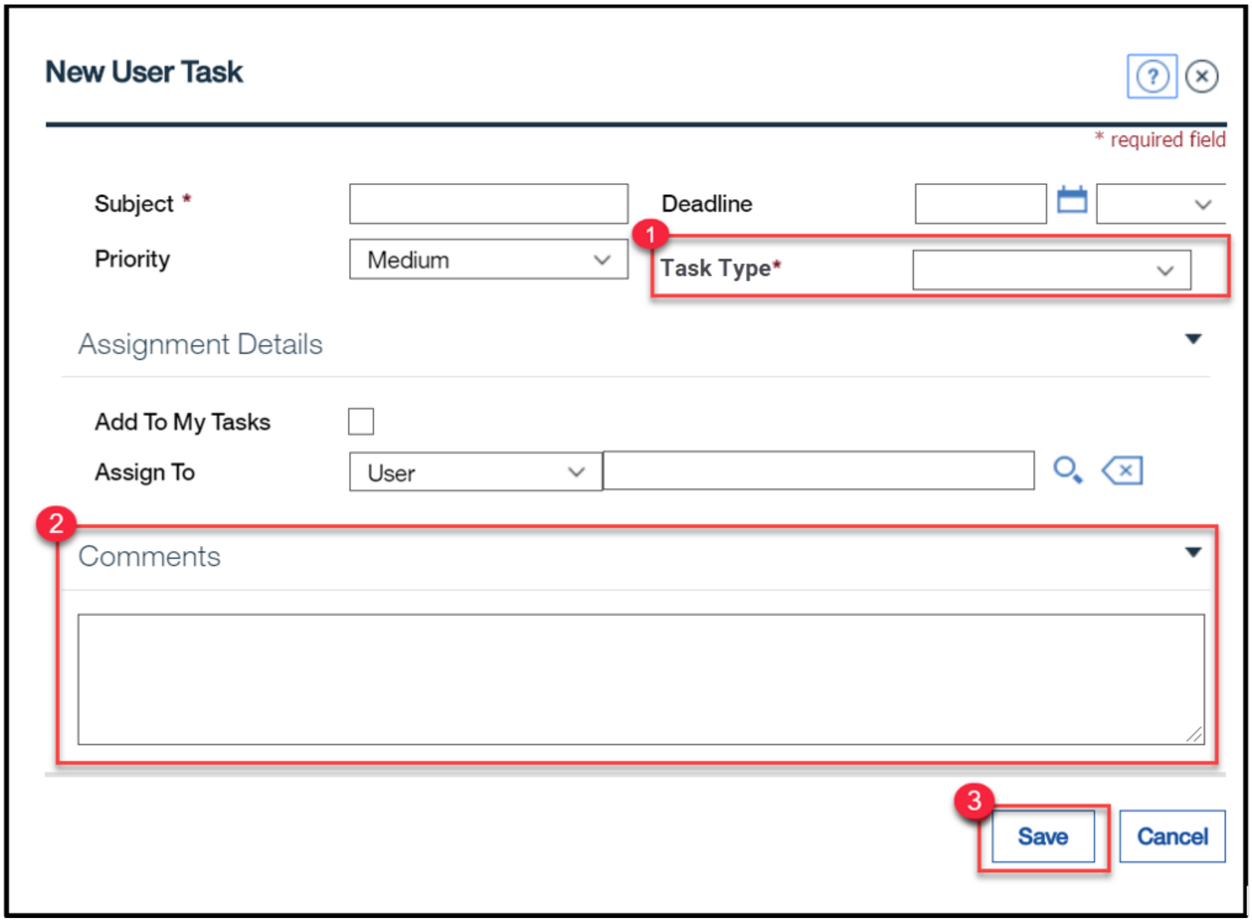
<PR-15855> PRMP has expressed the need to enhance the regional work queue by establishing a sorting logic for prioritizing the tasks in the work queue. Two of the criteria used to establish priority are the Task Deadline and the Task Type ~~Category~~. The New Task pages are being modified to add a new field ~~Category~~ Task Type and add a new logic to set the deadline to 10 calendar days when a deadline was not manually set. See the section "Regional Work Queue Prioritization Logic" for more details on sorting of tasks in regional work queues.

5.4.1 New Caseworker Task via Person Administration Page

The New Caseworker Task page is used to create a new Task from the Administration tab in the Person module. This page is being modified to add a new field <PR-15855> ~~'Category'~~ 'Task Type' and add new logic to set the deadline to 10 calendar days when one was not manually set.

5.4.1.1 Screenshot (Modify)

<PR-15855> Figure 31: New Caseworker Task



5.4.1.2 Description of Modifications and Additions

1. <PR-15855> ~~Category~~ Task Type

Dropdown, New, Mandatory

The ~~Category~~ Task Type dropdown will allow caseworkers to select the ~~category~~ task type of the task. The selected ~~category~~ task type will be used when prioritizing tasks within the regional work queue.

> ***Tech Note: Code Table name is ~~Activity~~ PRTaskType Category. Spanish translation: Tipo de Tarea***

2. Comment

Textbox, Modify, Mandatory

The worker must enter a comment for each task that is manually created.

3. Save

Button, Modify

When Save is clicked and ~~Category~~ Task Type is blank, then display error message:

> ~~'Category'~~ 'Task Type' must be selected.

When Save is clicked and Comment is blank, then display error message:

> 'Comment' must be entered.

When Save is clicked and Deadline is blank, then set the deadline to 10 calendar days.

When Save is clicked and Assignment Details is blank, then:

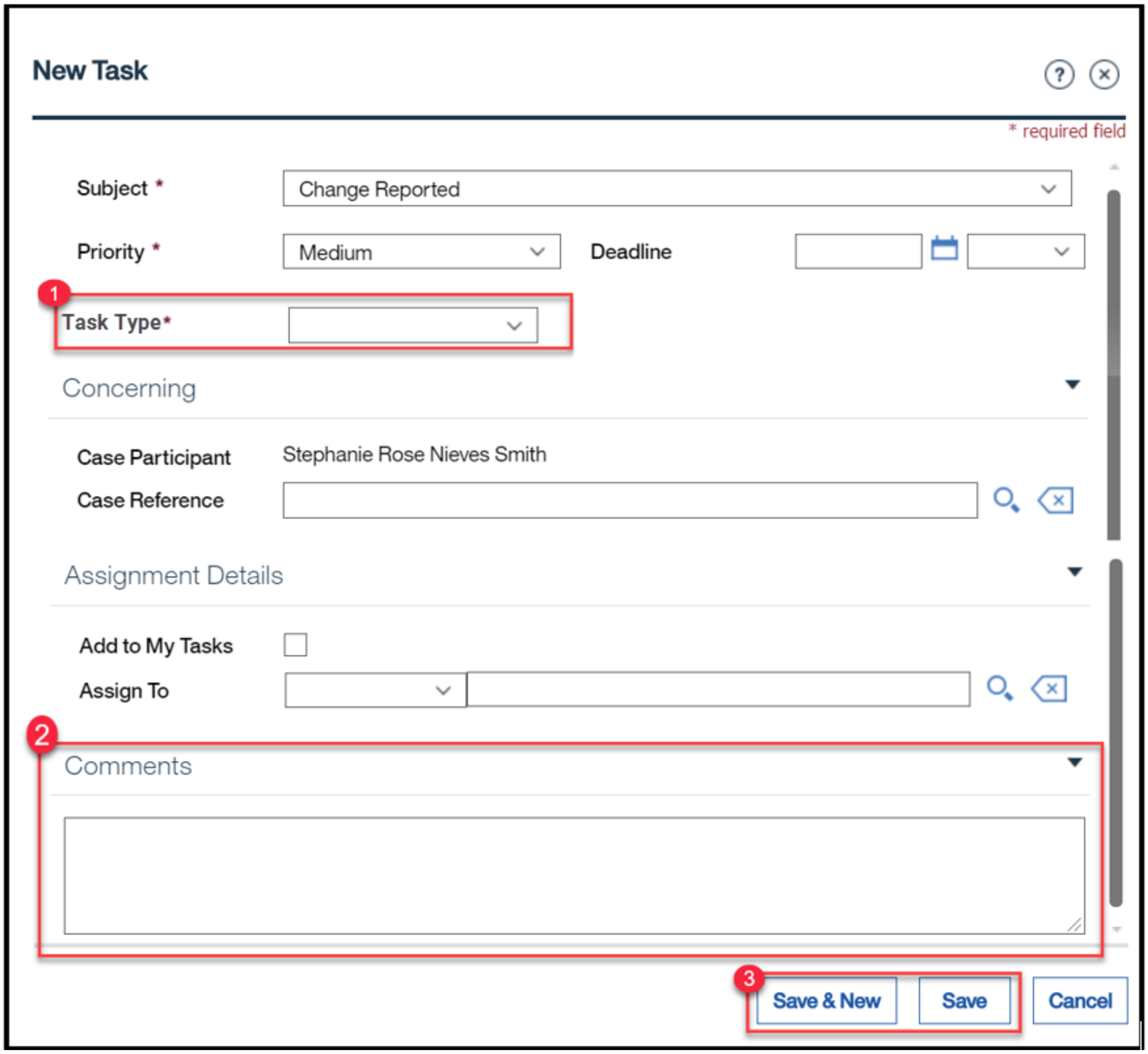
> Remove error message and use the regional queue assignment logic for assignment.

5.4.2 New Task from Person Action Menu

The New Task page is used to create a new Task from the main Action Menu on the Person module. This page is being modified to add a new field <PR-15855> ~~'Category'~~ 'Task Type' and add new logic to set the deadline to 10 calendar days when a deadline was not manually set.

5.4.2.1 Screenshot (Modify)

<PR-15855> Figure 32: New Task



5.4.2.2 Description of Modifications and Additions

1. <PR-15855> ~~Category~~ Task Type

Dropdown, New, Mandatory

The ~~Category~~ Task Type dropdown will allow caseworkers to select the ~~category~~ task type of the task. The selected ~~category~~ task type will be used when prioritizing tasks within the regional work queue.

2. Comment

Textbox, Modify, Mandatory

The worker must enter a comment for each task manually created.

3. Save & New/Save

Button, Modify

When Save & New/Save is clicked and ~~Category~~ Task Type is blank, then display error message:

~~'Category'~~ 'Task Type' must be selected.

When Save & New/Save is clicked and Comment is blank, then display error message:

'Comment' must be entered.

When Save & New/Save is clicked and Deadline is blank, then set the deadline to 10 calendar days.

When Save is clicked and Assignment Details is blank, then:

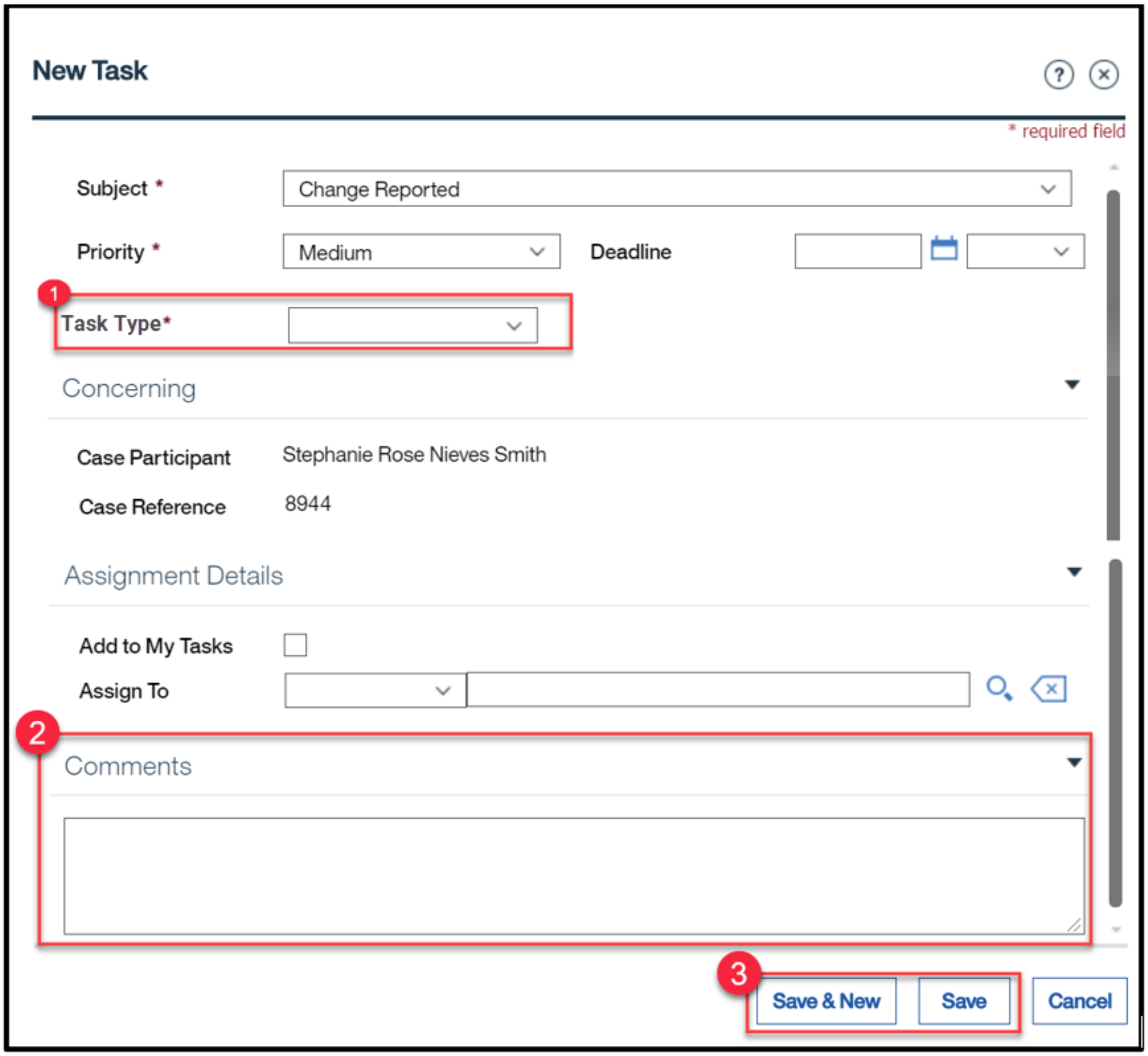
Remove error message and use the regional queue assignment logic for assignment.

5.4.3 New Task from Income Support Application Action Menu

The New Task page is used to create a new Task from the main Action Menu on the Application module. This page is being modified to add a new field<PR-15855> ~~'Category'~~ 'Task Type' and add new logic to set the deadline to 10 calendar days when one was not manually set.

5.4.3.1 Screenshot (Modify)

<PR-15855> Figure 33: New Task



5.4.3.2 Description of Modifications and Additions

1. <PR-15855> ~~Category~~ Task Type

Dropdown, New, Mandatory

The ~~Category~~ Task Type dropdown will allow caseworkers to select the ~~category~~ task type of the task. The selected ~~category~~ task type will be used when prioritizing tasks within the regional work queue.

2. Comment

Textbox, Modify, Mandatory

The worker must enter a comment for each task manually created.

3. Save & New/Save

Button, Modify

When Save & New/Save is clicked and ~~Category~~ Task Type and is blank, then display error message:

> ~~'Category'~~ 'Task Type' must be selected.

When Save & New/Save is clicked and Comment is blank, then display error message:

> 'Comment' must be entered.

When Save & New/Save is clicked and Deadline is blank, then set the deadline to 10 calendar days.

When Save is clicked and Assignment Details is blank, then:

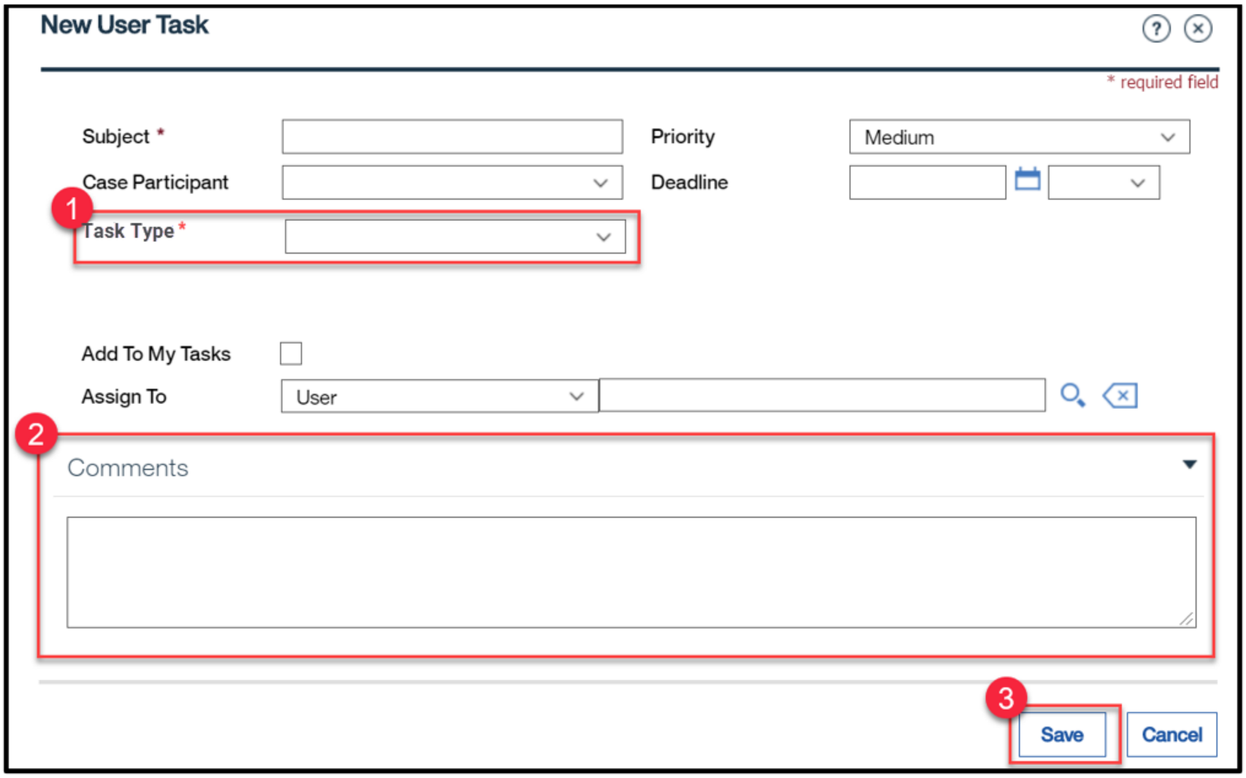
> Remove error message and use the regional queue assignment logic for assignment.

5.4.4 New Caseworker Task via Income Support Administration Page

The New Caseworker Task page is used to create a new Task from the Administration tab in the IC module. This page is being modified to add a new field <PR-15855> ~~'Category'~~ 'Task Type' and add new logic to set the deadline to 10 calendar days when one was not manually set.

5.4.4.1 Screenshot (Modify)

<PR-15855> Figure 34: New Caseworker Task



5.4.4.2 Description of Modifications and Additions

4. <PR-15855> ~~Category~~ Task Type

Dropdown, New, Mandatory

The ~~Category~~ Task Type dropdown will allow caseworkers to select the ~~category~~ task type of the task. The selected ~~category~~ task type will be used when prioritizing tasks within the regional work queue.

5. Comment

Textbox, Modify, Mandatory

The worker must enter a comment for each task manually created.

6. Save

Button, Modify

When Save is clicked and ~~Category~~ 'Task Type' and is blank, then display error message:

> ~~'Category'~~ 'Task Type' and must be selected.

When Save is clicked and Comment is blank, then display error message:

> 'Comment' must be entered.

When Save is clicked and Deadline is blank, then set the deadline to 10 calendar days.

When Save is clicked and Assignment Details is blank, then:

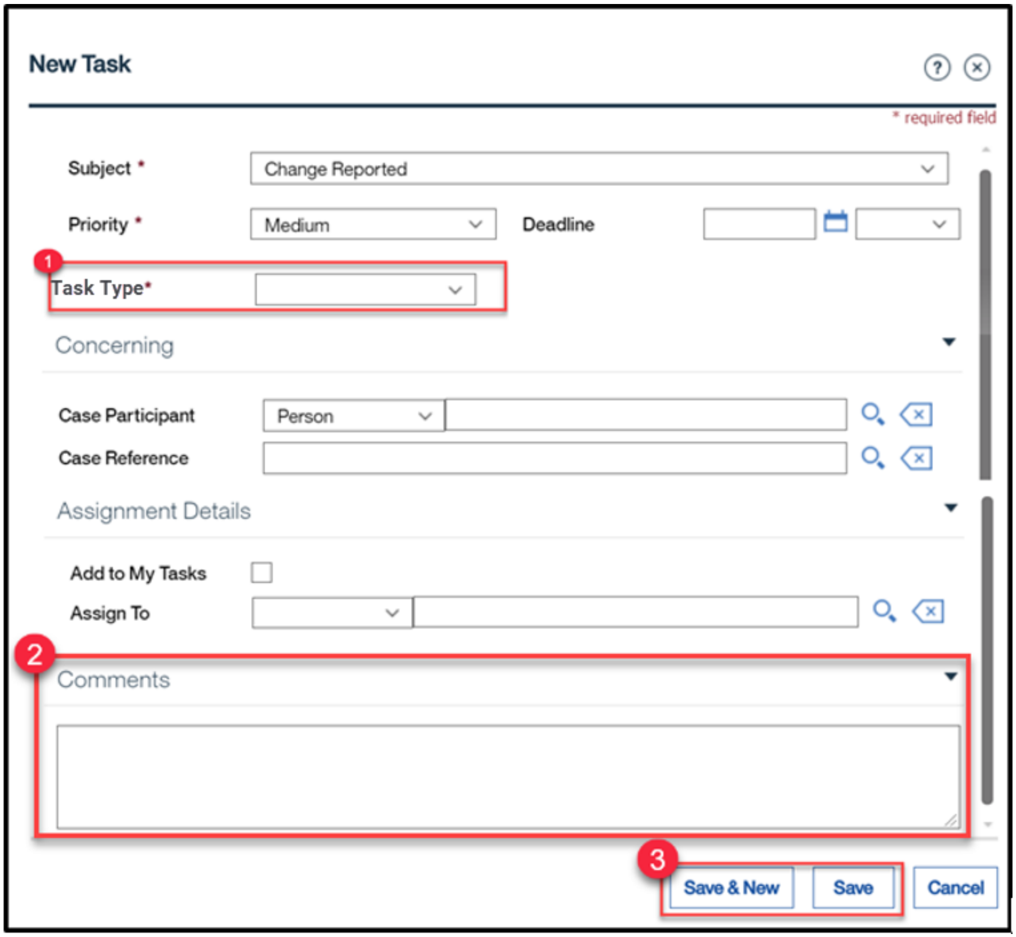
> Remove error message and use the regional queue assignment logic for assignment.

5.4.5 New Task from Inbox

The New Task page is used to create a new Task from the Inbox module. This page is being modified to add a new field <PR-15855> ~~'Category'~~ 'Task Type'and add new logic to set the deadline to 10 calendar days when one was not manually set.

5.4.5.1 Screenshot (Modify)

Figure 35: New Task



5.4.5.2 Description of Modifications and Additions

1. <PR-15855> ~~Category~~ Task Type

Dropdown, New, Mandatory

The ~~Category~~ Task Type dropdown will allow caseworkers to select the ~~category~~ task type of the task. The selected ~~category~~ task type will be used when prioritizing tasks within the regional work queue.

2. Comment

Textbox, Modify, Mandatory

The worker must enter a comment for each task manually created.

3. Save

Button, Modify

When Save is clicked and ~~Category~~ Task Type is blank, then display error message:

~~'Category'~~ 'Task Type' must be selected.

When Save is clicked and Comment is blank, then display error message:

'Comment' must be entered.

When Save is clicked and Deadline is blank, then set the deadline to 10 calendar days.

When Save is clicked and Assignment Details is blank <PR-15857> AND Concerning is NOT blank, then:

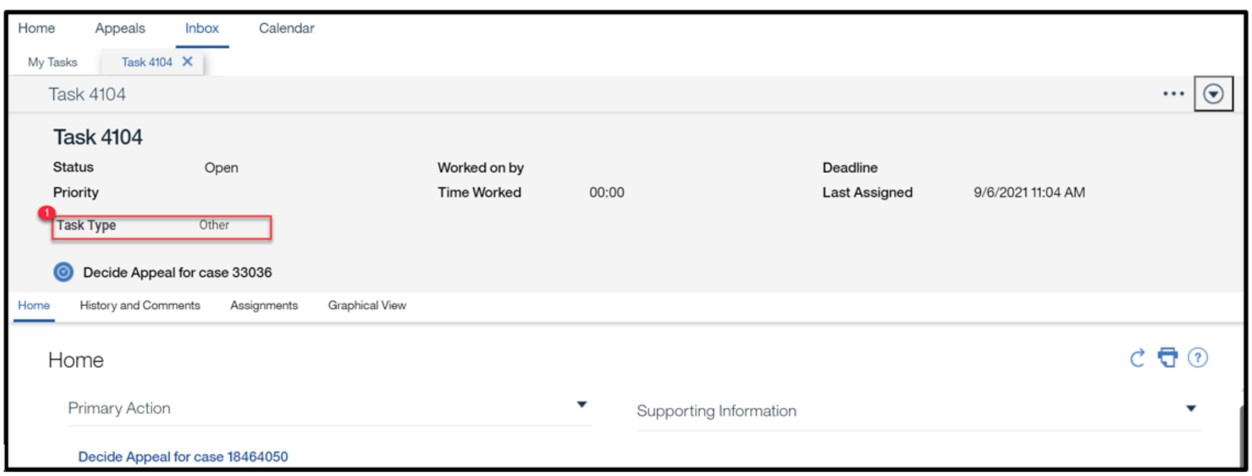
Remove error message and use the regional queue assignment logic for assignment.

5.4.6 <CR103> Task

The Task page display information about a task. This page is being modified to add <PR-15855> ~~'Category'~~ 'Task Type' as a new field.

5.4.6.1 Screenshot (Modify)

<PR-15855> Figure 36: Task



5.4.6.2 Description of Modifications and Additions

4. <PR-15855> ~~Category~~ Task Type

Static Text, New

The ~~Category~~ Task Type will display the assigned ~~category~~ task type of the task.

6 Batch Modifications

The Batch Modifications section will provide a detailed list of all the batch processes being modified, added, or removed per the PRMP requirements associated to the Enhanced Workload Management FDD.

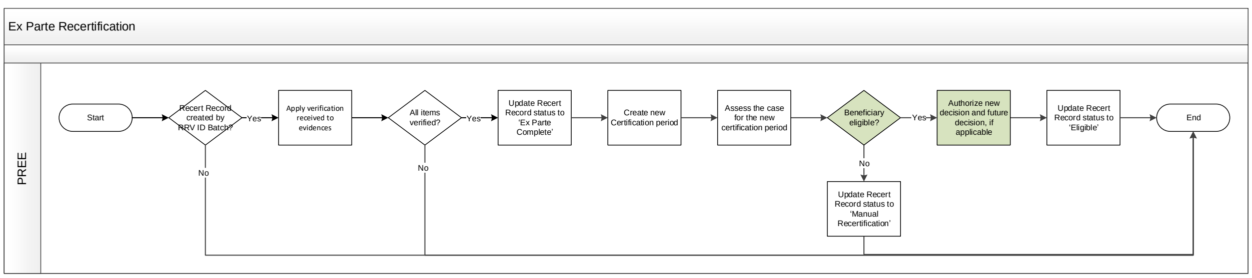
6.1 Ex Parte Recertification Batch (Modify)

The Ex Parte Recertification Batch is one of the 2 batches in the Ex-Parte process. This batch will apply all the verifications received from the RRV response file. Beneficiaries with all evidences verified will be evaluated for a new certification period. For additional information about this process, please review the Renewal FDD.

Only the shaded figures were modified.

6.1.1 High Level Steps

Figure 37: Ex Parte Recertification Batch



6.1.2 Predecessor

No modification made.

6.1.3 Successor

No modification made.

6.1.4 Execution Frequency

No modification made.

6.1.5 Inputs

No modification made.

6.1.6 Outputs

No modification made.

6.1.7 Detailed Steps

- **IF** Recertification Record was created by RRV Case Identification Batch on the 1st of the month

- **THEN** Apply the verifications received from the RRV response file to appropriate evidences
- **AND IF** All items were verified
- **THEN**
  - Update the Recertification Record to "Ex Parte Complete"
  - Create new certification period and set Start Date to the day after the current certification period ends
  - Assess the case for the new certification period created
- **AND IF** Beneficiary is still eligible
- **THEN**
  - Authorized any new decisions, including predictable change(s)*
  - Update the Recertification Record status to "Eligible"
- **ELSE** Update the Recertification Record status to "Manual Recertification".

Technote: The shaded figures and (*) are the only modification being made to this batch.

6.1.8 Control Report

No modification made.

7 Tasks, Alerts, Work Queues

The Tasks, Alerts, Work Queues section will provide a detailed list of all the tasks, alerts, and work queues being modified, added, or removed per the PRMP requirements associated with the Enhanced Workload Management FDD.

7.1 Regional Work Queue Prioritization Logic

PRMP has expressed the need to enhance the regional work queue by establishing the following sorting logic for prioritizing the tasks in the work queue:

- First, the tasks will be sorted by Task Due Date, in ascending order.
- Next, the tasks will be sorted by Task ~~Category~~ Type: Application, Renewal, Change of Circumstance (COC), Interface, Other.
- Lastly, the tasks will be sorted by Task Creation Date, in ascending order.

Upon the release of this functionality, there will be tasks which were created without due dates and ~~category~~ task type. Therefore, all tasks created prior to the functionality release will be given the highest priority by Creation Date, oldest to newest. All new tasks created will follow the prioritization logic described above.

<PR-15856> Below are the places where this prioritization logic will be applied to:

- Get Next Task from Preferred Queue, when the caseworker preferred queue is one of the regional work queues. This link is accessible from:
    - My Task → Action Menu
    - Work Queues
- Get Next Task from Work Queue, when the selected work queue is one of the regional work queues. This link is accessible from:
    - My Task → Action Menu
    - Work Queues
- Get Next Task, which clicked from the action menu of a regional work queue from the Caseworker Subscribed Work Queues.

Here's a list of all the work queue considered as a regional work queue:

- Arecibo
- Bayamon
- Caguas
- Fajardo
- Mayaguez
- Metropolitana
- Oficina Central
- Ponce

In addition, systematically generated tasks will be assigned a ~~category~~ task type to ensure proper prioritization within the regional work queues.

Table 3: R1 Systematically Generated Tasks

Task Name	Task ~~Category~~ Type	Comments
Process Phone Application	Application	Task is due in 10 days. The task details are in the Intake Application Processing FDD.
TBQ - Validate Demographic Information	Interface	Task is due in 30 days. The task details are in the Interface Design Document (IDD).
ASES – Daily Rejection File	Interface	Task is due in 10 days. The task details are in the Interface Design Document (IDD).
Central Print - Address Mismatch	Interface	Task is due in 10 days. The task details are in the Interface Design Document (IDD).
PRMMIS – Verify Error in Application	Interface	Task is due in 10 days. The task details are in the Interface Design Document (IDD).

7.2 <CR PRMO-123> Non-PRMP Tasks to be turned off.

The following tasks are non-PRMP tasks that are not required and need to be turned off:

1. **New In-Edit Evidence on Case ###### as evidence failed to activate**
2. **La aplicación Asistencia para Ingresos ###### para <NAME> está preparada para la resolución.**
3. **New Incoming Evidence on the Participant Case ##### that needs to be resolved.**
4. **New Incoming Evidence on Case #### that needs to be resolved.**

7.3 Work Queue Removal

The below listed work queues will be removed:

- DEFAULT
- Online Application Received Work Queue
- Withdrawal Request Created Work Queue
- Application Ready for Determination Work Queue
- CLIENT MULTI-MATCH NOTIFICATION
- HCR Online App Received Work Queue
- Self-service Credentials Work Queue
- Projected Eligibility Failure Work Queue
- Application Processing Queue
- Claims Queue
- MMIS Queue

<PR-16213>Tech note: implement a soft deletion for these work queue by setting ALLOWCASEWORKERSUBSCRIPTIONIND to 0 and SENSITIVITY to 5. This will make these work queues unavailable to caseworkers.

7.4 Work Queue Subscription

Access to work queues will be controlled by caseworker role. All caseworkers will have the same role; therefore, they can access any regional work queue to subscribe to it and get tasks from it. The following table lists all work queues and indicates (X) which roles can access the queue.

Table 4: Work Queue Subscription

Security Role → Work Queue ↓	PRCASEWORKERROLE	PRCASEWORKERSD	PRSUPERVISORROLE	PRFUNCTIONALADMIN
Arecibo	X	X	X	X
Bayamon	X	X	X	X
Caguas	X	X	X	X
Mayaguez	X	X	X	X
Ponce	X	X	X	X
Metropolitana	X	X	X	X
Fajardo	X	X	X	X

7.5 Tasks

The following tasks are being added to PREE as part of the Enhanced Workload Management FDD.

7.5.1 Address Changed by Call Center Task (New)

PRMP needs PREE to systemically generate a task when the Call Center adds or modifies the Addresses Evidence, instead of the manual task that the Call Center is responsible for creating. This will cause a caseworker to be made aware of this change, without the manual task from the Call Center, so they can complete the address change process.

Table 5: Address Change by Call Center

Task ☒ Notification ☐ Name: Address Change by Call Center		
Purpose: To notify the caseworker to process a new or modified address.		
Trigger(s): When Addresses Evidence is created or modified by a call center worker (identified by the system as a caseworker with the PRCallCenter security role) on an IC.		
~~Category~~ Task Type (select only if it is being routed to the regional work queue)	Application☐ Renewal☐ COC☒ Other☐ Interface☐	
Allocation Type	Caseworker☐ Position☐ Job☐ Org Unit☐ Queue☒	
Allocation Strategy	Based on the Primary Applicant's physical address, the task will be routed to the regional work queue associated to the region the physical address belongs to. Queue options are: ▪ Arecibo ▪ Bayamón ▪ Caguas ▪ Mayaguez ▪ Ponce ▪ Metropolitana ▪ Fajardo If the physical address is not in Puerto Rico, assign to any random queue.	
Links	Link	Yes ☒ No ☐
	Primary Action Link	None
	Supporting Information Link	View Integrated Case
Subject	Subject Text	Address Change by Call Center
Task Details	Deadline Strategy	Yes ☒ No ☐

	Deadline Strategy Details	10 calendar days from creation
	Escalation Strategy	N/A – No escalation strategy identified for this task
	Deadline Override Allowed	Yes ☐ No ☒
	Task Priority	Low ☐ Medium ☒ High ☐
	Manual Forwarding Allowed	Yes ☐ No ☒
Task/Notification Body Details	Message Body Text	The Call Center has created or modified the Addresses evidence on case <IC link>. Please review the change and complete the address change process.
Other special processing instructions:		

7.5.2 Determine if Application is Ready for Determination Task (New)

PRMP needs a way to ensure that <CR103> submitted applications ~~in "Submitted" status~~ with no unverified evidences and no ~~remaining~~ in-Edit evidences are not left unprocessed. To prevent these applications from being unprocessed, this new Task will be added to alert the caseworker to review and process the application ~~and determine if it is ready to be set to "Ready for Determination"~~.

Table 6: Determine if Application is Ready for Determination

Task ☒ Notification ☐ Name: Determine if application is ready for determination
Purpose: To notify the caseworker to review and process a submitted application ~~in "Submitted" status~~ which has no unverified evidence and no ~~remaining~~ in-Edit evidence. ~~and determine if it is ready to be set to "Ready for Determination".~~

<PR-16133> **Trigger(s):** Generate this task as part of the RFI Batch ~~after business hours~~ for each application that meets the following criteria: ▪ Application status is Submitted OR Ready for Determination. ▪ All evidences are active. ▪ There are no outstanding verifications. ▪ This task was not previously generated for this application.		
~~Category~~ Task Type	Application☒ Renewal☐ COC☐ Other☐ Interface☐	
Allocation Type	Caseworker☐ Position☐ Job☐ Org Unit☐ Queue☒	
Allocation Strategy	Based on the Primary Applicant's physical address, the task will be routed to the regional work queue associated to the region the physical address belongs to. Queue options are: ▪ Arecibo ▪ Bayamón ▪ Caguas ▪ Mayaguez ▪ Ponce ▪ Metropolitana ▪ Fajardo If the physical address is not in Puerto Rico, assign to any random queue.	
Links	Link	Yes ☒ No ☐
	Primary Action Link	View Application
	Supporting Information Link	None
Subject	Subject Text	Determine if Application is Ready for Determination
Task Details	Deadline Strategy	Yes ☒ No ☐

	Deadline Strategy Details	10 days
	Escalation Strategy	N/A – No escalation strategy identified for this task
	Deadline Override Allowed	Yes ☐ No ☒
	Task Priority	Low ☐ Medium ☒ High ☐
	Manual Forwarding Allowed	Yes ☐ No ☒
Task/Notification Body Details	Message Body Text	All evidences are activated, and verifications are completed for the application <Application link> Please review and process the application.~~ and determine whether it is ready for the application status to be changed to 'Ready for Determination'~~.
Other special processing instructions:		

7.5.3 Past Due Application Task (New)

PRMP needs a way to ensure that applications are not left unprocessed once the application due date has been reached. Since applicants who are eligible and have provided all the required verifications will not be denied by the Application Denial Batch, <CR103> ~~Since an application with no unverified evidence cannot be denied by a batch process,~~ this task will alert a caseworker to take the appropriate steps to complete the application process.

Table 7: Past Due Application Task

Task ☒	Notification ☐	Name: Past Due Application Task
Purpose: To notify the caseworker to review a submitted application that is past the application due date and take the appropriate steps to complete the application process.		

<PR-16133>

Trigger(s): Generate this task as part of the Application Denial Batch ~~after business hours~~ for each application that meets the following criteria:

- Application status is Submitted or Ready for Determination ~~not Disposed~~
- Date = Applicant's Application due date + 1 day ~~has been reached.~~
- ~~There are no outstanding verifications.~~
- This task was not previously generated for this application.

~~Category~~ Task Type	Application☒ Renewal☐ COC☐ Other☐ Interface☐	
Allocation Type	Caseworker☐ Position☐ Job☐ Org Unit☐ Queue☒	
Allocation Strategy	Based on the Primary Applicant's physical address, the task will be routed to the regional work queue associated to the region the physical address belongs to. Queue options are: ▪ Arecibo ▪ Bayamón ▪ Caguas ▪ Mayaguez ▪ Ponce ▪ Metropolitana ▪ Fajardo If the physical address is not in Puerto Rico, assign to any random queue.	
Links	Link	Yes ☒ No ☐
	Primary Action Link	View Application
	Supporting Information Link	None
Subject	Subject Text	Review past due application
Task Details	Deadline Strategy	Yes ☒ No ☐
	Deadline Strategy Details	Application Due Date

	Escalation Strategy	N/A – No escalation strategy identified for this task
	Deadline Override Allowed	Yes ☐ No ☒
	Task Priority	Low ☐ Medium ☒ High ☐
	Manual Forwarding Allowed	Yes ☐ No ☒
Task/Notification Body Details	Message Body Text	Application <Application link> due date has been reached <CR103> ~~and there is no unverified evidence~~. Please review the application and determine whether it is ready for determination or must be withdrawn. An action must be taken to complete this application before setting this task to complete.
Other special processing instructions:		

7.6 <CR103> ~~Notification~~

~~The following notifications are being added to PREE as part of the Enhanced Workload Management FDD.~~

~~7.6.1~~ <CR103> ~~EW-Auto Assessment Issue Task – Application (New)~~

~~When the system performs an auto assessment of an application, such as when a caseworker selects 'Authorize All', an issue can occur. When an issue occurs, this notification will be generated to provide details about the issue.~~

~~Table 8: Auto Assessment Issue Task – Application~~

~~Task ☒ — Notification ☐ Name: Auto Assessment Issue Task - Application~~
~~**Purpose:** To notify the caseworker an issue occurred when attempting to auto assess an application.~~

~~**Trigger(s):** When Auto Assessment process for application was completed (triggered by 'Authorize All' button), but the application was not disposed.~~		
~~Category~~ Task Type	~~Application☒ Renewal☐ COC☐ Other☐ Interface☐~~	
~~Allocation Type~~	~~Caseworker☐ Position☐ Job☐ Org Unit☐ Queue☒~~	
~~Allocation Strategy~~	~~To the caseworker who clicked on 'Ready for Determination'. If 'Ready for Determination' status was set by the PREE system, then based on the Primary Applicant's physical address, the task will be routed to the regional work queue associated with the region the physical address belongs to.~~ ~~Queue options are:~~ ▪ ~~Arecibo~~ ▪ ~~Bayamón~~ ▪ ~~Caguas~~ ▪ ~~Mayaguez~~ ▪ ~~Ponce~~ ▪ ~~Metropolitana~~ ▪ ~~Fajardo~~ ~~If the physical address is not in Puerto Rico, assign to any random queue.~~	
~~Links~~	~~Link~~	~~Yes ☒ No ☐~~
	~~Primary Action Link~~	~~None~~
	~~Supporting Information Link~~	~~Application Home~~
~~Subject~~	~~Subject Text~~	~~Auto assessment of application <Application #> was unsuccessful~~
~~Task Details~~	~~Deadline Strategy~~	~~Yes ☐ No ☒~~
	~~Deadline Strategy Details~~	~~N/A~~
	~~Escalation Strategy~~	~~N/A – No escalation strategy identified for this notification~~

	~~Deadline Override Allowed~~	~~Yes ☐ No ☒~~
	~~Task Priority~~	~~Low ☐ Medium ☒ High ☐~~
	~~Manual Forwarding Allowed~~	~~Yes ☐ No ☒~~

~~Task/Notification Body Details~~	~~Message Body Text~~	~~Auto assessment of application <Application link> was unsuccessful due to the following reason:~~ ▪ ~~<List all the appropriate snippets>~~ ~~Possible snippets:~~ ▪ ~~When there is an in-edit evidence, then add snippet: <System error message when there is in-edit evidence>~~ ▪ ~~When there is an unresolved prospect person, then add snippet: <System error message when there is a prospect person>~~ ▪ ~~When there is an unresolved issue, then add snippet: Please resolve the Issue record.~~ ▪ ~~When there is an applicant already receiving benefits, then add snippet: <Applicant Name> - <System error message when receiving benefits on another case>~~ ▪ ~~When there is an applicant with unverified mandatory evidence, then add snippet: <Applicant Name> - <System error message when PDC cannot be activated due to unverified mandatory evidence>~~ ▪ ~~When issue is unknown for an applicant, then then add snippet: <Applicant Name> - An unexpected error occurred. Please review the case and try again.~~

~~Other special processing instructions:~~

~~7.6.2~~ <CR103> ~~**Auto Assessment Issue Task – COC (New)**~~

~~When the system performs an auto assessment of a COC, such as when a caseworker selects 'Accept all decisions' on the Changed Decision page, an issue can occur. When an issue occurs, this notification will be generated to provide details about the issue.~~

~~Table 9: Auto Assessment Issue Task – COC~~

~~Task ☒ — Notification ☐ Name: Auto Assessment Issue Task - COC~~	
~~**Purpose:** To notify the caseworker an issue occurred when attempting to auto assess a COC.~~	
~~**Trigger(s):** When Auto Assessment process was completed, but a decision was not accepted, authorized, or activated.~~	
~~Category~~ Task Type	~~Application☐ Renewal☐ COC☒ Other☐ Interface☐~~
~~Allocation Type~~	~~Caseworker☐ Position☐ Job☐ Org Unit☐ Queue☒~~

~~Allocation Strategy~~	~~The task will be sent to the caseworker who clicked on 'Accept all decisions' or 'Accept' on the Changed Decision page, unless the Accept on Hold Decision was performed by the PREE system. In this case, based on the Primary Applicant's physical address, the task will be routed to the regional work queue associated with the region the physical address belongs to.~~ ~~Queue options are:~~ ▪ ~~Arecibo~~ ▪ ~~Bayamón~~ ▪ ~~Caguas~~ ▪ ~~Mayaguez~~ ▪ ~~Ponce~~ ▪ ~~Metropolitana~~ ▪ ~~Fajardo~~ ~~If the physical address is not in Puerto Rico, assign to any random queue.~~	
~~Links~~	~~Link~~	~~Yes ☒ No ☐~~
	~~Primary Action Link~~	~~None~~
	~~Supporting Information Link~~	~~Application Home~~
~~Subject~~	~~Subject Text~~	~~Auto reassessment for Case <IC #> was unsuccessful~~
~~Task Details~~	~~Deadline Strategy~~	~~Yes ☐ No ☒~~
	~~Deadline Strategy Details~~	~~N/A~~
	~~Escalation Strategy~~	~~N/A – No escalation strategy identified for this notification~~
	~~Deadline Override Allowed~~	~~Yes ☐ No ☒~~
	~~Task Priority~~	~~Low ☐ Medium ☒ High ☐~~

	~~Manual Forwarding Allowed~~	~~Yes ☐ No ☒~~
~~Task/Notification Body Details~~	~~Message Body Text~~	~~Auto reassessment of Case <Case #> was unsuccessful due to the following reason:~~ ▪ ~~<List all the appropriate snippets>~~ ~~Possible snippets:~~ ▪ ~~When there is an unresolved prospect person, then add snippet: <System error message when there is a prospect person>~~ ▪ ~~When there is an unresolved issue, then add snippet: Please resolve the Issue record.~~ ▪ ~~When there is an applicant already receiving benefits, then add snippet: <Applicant Name> - <System error message when receiving benefit on another case>~~ ▪ ~~When there is an applicant with unverified mandatory evidence, then add snippet: <Applicant Name> - <System error message when PDC cannot be activated due to unverified mandatory evidence>~~ ▪ ~~When issue is unknown for an applicant, then then add snippet: <Applicant Name> - An unexpected error occurred. Please review the case and try again.~~

~~Other special processing instructions:~~

8 Development Considerations

The Development Considerations section contains additional information for the development team to take into consideration during the development phase of the Enhanced Workload Management FDD.

8.1 Prepopulated Application

The prepopulated application on the IC will only populate from the active evidence.

When new data is captured on the prepopulated application, it should follow the Release 1 functionality when creating the new evidences.

If the Blind Detail, Disability Detail, Former Foster Care Detail, or the Medical Insurance Detail pages are displayed and there is not an active evidence to prepopulate the page with, then the page should be displayed as the regular editable version.

8.1.1 Existing Evidences from Prepopulated Information

If the caseworker modifies prepopulated information, then the system will end date the existing active evidence or update the effective date of change based on the fields available in the evidence.

When the system is end dating evidence and there is not an end date provided by the caseworker, then it will set the evidence end date to the day before the application date.

If creating a new evidence and there is not a start date provided by the caseworker, then the system will set the evidence start date to the application date.

8.1.2 Household Member Evidences

Not every data field on the Household Member Evidence is being prepopulated. The evidence is being updated when the prepopulated data is modified. The other data not being prepopulated might also be entered on the IEG. If so, ensure that the entered data is reflected on the Household Member Evidence.

9 Training Considerations

The Training Considerations section contains additional information for the Organizational Change Management (OCM) and Training team to take into consideration during the development of supporting documents related to the Enhanced Workload Management FDD.

9.1 Prepopulated Application

Caseworker will have the option to complete a prepopulated application for applicants on an existing case. PRMP to provide instruction for when a prepopulated application vs an expedited application vs a blank application should be used.

Household member changes should be completed by the caseworker. Caseworkers will be responsible for completing the Remove a Household Member process before creating a new application from the IC.

Changes made to existing household members may impact eligibility for any members currently receiving benefits on the IC.

The prepopulated application may cause duplicate evidences to be created because applicants will be required to provide information about incomes, resources, and expenses. Caseworkers will be responsible for making the appropriate updates to the active and in-edit evidences.

PRMP will need to decide when the agency will use the prepopulated application vs the COC process to evaluate an applicant for benefits. There are pros and cons to be considered during R2 OCM discussions.

9.2 Auto Assessment

<CR103> ~~Depending on the household size, the process may take up to a few minutes to complete.~~ When the process is completed and there is an error, an error message with appear. ~~notification will be generated to the caseworker who triggered the auto assessment.~~ Caseworker should resolve the issue per the error message then retrigger the automation process to resume. Once each decision has been activated or deny, the Caseworker can monitor the PDC activation status from the Program table within the Home tab.

10 Reporting Considerations

The Reporting Considerations section contains additional information for the Management Reports FDD team to take into consideration during the design of the Management Reports FDD.

10.1 Timing Tasks

PRMP expressed the potential need to time how long it takes a worker to complete a task. This information may be used during development of a new way to track productivity of a caseworker using PREE.

11 Use Cases and Scenarios

This section contains Use Cases and Scenarios associated to the Enhanced Workload Management FDD. Use Cases describe the high-level processes to complete an activity. Scenarios will be used to validate the modification made within the Enhanced Workload Management FDD.

11.1 Use Case 1: Intake and Application Process using Prepopulated Application

11.1.1 Description

An applicant is known in PREE and is associated to an open IC. Applicant wants to reapply for benefits.

11.1.2 Actors

Worker, Supervisor

11.1.3 Pre-Conditions

Primary applicant is the Primary Member to an open IC.

11.1.4 Post-Conditions

N/A

11.1.5 Main Scenario

1. Worker navigates to the IC of the Primary Member.
2. Worker adds and removes household members, if applicable.
3. Worker completes the application intake process using the prepopulated application.
4. Worker navigates to the Application Case.
5. Worker resolves Duplicate/Prospect Person records, if applicable.
6. Worker resolves all issues, if applicable.
7. Worker reviews and modifies active/in-edit evidences and/or discharges in-edit evidences.
8. Worker activates all the in-edit Evidences.
9. Worker uses Electronic Verification to verify mandatory evidence.
10. Worker enters the supporting verification document information provided by the applicant for the remaining unverified mandatory evidence, if applicable.
11. Worker clicks on Ready for Determination.
12. Worker clicks on Authorize All
13. Worker generates NOD.

14. End Use Case.

11.1.6 Extensions

11.1.6.1 Extension 1 (After Main Scenario, Step 11)

This extension happens when there are beneficiaries on the IC.

1. Worker returns to the IC and accepts all on-hold decisions.
2. Return to Step 12 in the main scenario.

11.1.6.2 Extension 2 (After Main Scenario, Step 11)

This extension happens when there <CR103> ~~are~~ is an issue ~~and a Notification is generated~~.

3. Error message displays. ~~Worker reviews Notification list.~~
4. Worker resolves issues.
5. Return to Step 11.

11.1.7 Frequency

Per Worker, a few times per day.

11.1.8 Special Requirements

11.1.8.1 Performance

No special performance requirements.

11.1.8.2 Security

Worker must have access to:

- Person page.
- IC page.
- PDC page.

11.1.8.3 Usability / Accessibility

No special usability requirements.

11.1.8.4 Other

No other requirements.

11.2 Use Case 2: Processing a COC

11.2.1 Description

A recipient reported a COC.

11.2.2 Actors

Worker, Supervisor

11.2.3 Pre-Conditions

An open IC with active evidence.

11.2.4 Post-Conditions

N/A

11.2.5 Main Scenario

6. Worker navigates to the IC.
7. Worker updates the appropriate evidences.
8. Worker activates all the in-edit Evidences.
9. Worker uses Electronic Verification to verify mandatory evidence.
10. Worker enters the supporting verification document information provided by the applicant for the remaining unverified mandatory evidence, if applicable.
11. Worker accepts all on-hold decisions.
12. Worker generates NOD.
13. End Use Case.

11.2.6 Extensions

~~11.2.6.1~~ <CR103> ~~Extension 1 (After Main Scenario, Step 6)~~

~~This extension happens when there are issues and a Notification is generated.~~

~~1. Worker reviews Notification list.~~

~~2. Worker resolves issues.~~

~~3. Return to Step 6 in the main scenario.~~

11.2.7 Frequency

Per Worker, a few times per day.

11.2.8 Special Requirements

11.2.8.1 Performance

No special performance requirements.

11.2.8.2 Security

Worker must have access to:

- Person page
- IC page
- PDC page

11.2.8.3 Usability / Accessibility

No special usability requirements.

11.2.8.4 Other

No other requirements.

11.3 Use Case 3: Complete a Renewal

11.3.1 Description

This use case will instruct the worker on how to complete a renewal.

11.3.2 Actors

Worker, Supervisor

11.3.3 Pre-Conditions

Beneficiary drops off document(s) for renewal or comes in for an in-person renewal. Worker completes Use Case "Search for an IC" as described in the Case Management FDD.

11.3.4 Post-Conditions

Worker locates the application.

11.3.5 Main Scenario

1. Worker navigates to the IC.
2. Worker identifies all the PDC's within the renewal period from the IC homepage.
3. For each PDC within the renewal period, the worker will navigate to the PDC and update the Recertification record to "In Progress".
4. Worker navigates back to the IC.
5. Worker updates the appropriate evidences.
6. Worker activates all the in-edit Evidences.
7. Worker uses Electronic Verification to verify mandatory evidence.
8. Worker enters the supporting verification document information provided by the applicant for the remaining unverified mandatory evidence, if applicable.
9. Worker returns to each Recertification Record and updates the status to "Complete".
10. Worker generates NOD.
11. End Use Case.

11.3.6 Extensions

11.3.6.1 Extension 1 (After Main Scenario, Step 9)

This extension happens when there are issues and a message is displayed.

1. Worker resolves issues.

2. Return to Step 9 in the main scenario.

11.3.7 Frequency

Per Worker, a few times per day.

11.3.8 Special Requirements

11.3.8.1 Performance

No special performance requirements.

11.3.8.2 Security

Worker must have access to:

- Person page
- IC page
- PDC page

11.3.8.3 Usability / Accessibility

No special usability requirements.

11.3.8.4 Other

No other requirements.

11.4 Scenario 1: Prepopulated Application

Table 10: Prepopulated Application Scenarios

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
EWM-PPA-001	This is to validate that the Medical Assistance application prepopulates with the information of the household members.	A Medical Assistance Application was created.	The application is prepopulated with the information of the household members.

11.5 Scenario 2: Auto Assessment and Authorization

Table 11: Business Processing Scenarios

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
EWM-AAA-001 **<CR103>**	This is to validate that when 'Yes' on the 'Authorize All' is selected on a Medical Assistance application PREE will automatically authorize decisions and activate PDCs.	~~A Medical Assistance application is set to 'Authorize All' status.~~ Worker clicks on the 'Authorize All' button then the 'Yes' button.	PREE will assess applicants; for those eligible it will authorize their decision and activate the PDC. For ineligible applicants PREE will deny their request for benefits. For beneficiaries, PREE will decline their decision. When an error in the automatic process occurs, PREE will create a notification to the worker.
EWM-AAA-002	This is to validate that the new 'Accept all decisions...' button performs correctly.	A Change of Circumstance has been recorded on a case, evidence is verified and activated. Worker presses the 'Accept all decisions...' button.	Each case is reassessed for coverage, best coverage is selected; current coverage is closed, and new coverage authorized with its PDCs activated, if higher coverage. If same or negative decision results, there is no change to existing process.

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
EWM-AAA-003	This is to validate that the new 'Accept' link performs correctly.	A Change of Circumstance has been recorded on a case, evidence is verified and activated. Worker presses the 'Accept all decisions...' button.	Only the individual case is reassessed for coverage, best coverage is selected; current coverage is closed, and new coverage authorized with its PDCs activated, if higher coverage. If same or negative decision results, there is no change to existing process.
EWM-AAA-003	This is to validate that when a recertification record status is set to complete, if the beneficiary is still eligible any new decisions will be authorized, including predictable change(s), and any new PDCs will be activated.	A worker has processed a recertification, changed its status to ‘Complete’, and pressed the Save button.	Any new decisions are authorized, including predictable change(s). If recertification resulted in eligibility for a new program, the new PDC is automatically activated.

11.6 Scenario 4: Task and Notification Processing

Table 12: Task and Notification Processing Scenarios

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
INT-TP-001	This is to validate that tasks in regional work queues are sorted according to Task Due Date, Task ~~Category~~ Type, and Task Creation Date in that order.	Worker navigates to the My Tasks tab and chooses 'Get Next Task From Queue...' from the menu. Worker then selects a regional work queue and presses Save.	The highest priority task is chosen, based on Task Due Date, Task ~~Category~~ Type, and Task Creation Date in that order.
INT-TP-002	This is to validate that systematically generated tasks are created with the correct Task ~~Category~~ Type.	One of the following tasks is created by the system: Process Phone Application, TBQ - Validate Demographic Information, ASES - Daily Rejection File, Central Print - Address Mismatch, PRMMIS - Verify Error in Application, Process Address Change, Determine if Application is Ready for Determination or Final Notice for Application not Ready for Determination.	The Task ~~Category~~ Type is set to 'COC' for the Process Address Change task, 'Application' for the Process Phone Application, Determine if Application is Ready for Determination and Final Notice for Application not Ready for Determination tasks, and 'Interface' for all others.

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
INT-TP-003	This is to validate that workers can subscribe to work queues they are authorized for.	Worker selects the 'Subscribe to a Work Queue...' shortcut under Work Queues. Worker enters the appropriate work queue name or selects one from search results and presses Save.	The worker is successfully subscribed to the work queue.
INT-TP-004	This is to validate that a 'Process Address Change' task is generated when a new or modified address is added to an IC by a worker with the PRCALLCENTER security role.	Worker with the security role PRCALLCENTER creates or modifies address evidence on an IC.	A 'Process Address Change' task is generated automatically and routed to the appropriate regional work queue based on the new address.
INT-TP-005	This is to validate that a 'Determine if Application is Ready for Determination' task is generated when a submitted application may be ready for determination.	Worker processes an application in 'Submitted' status, verifies and activates all evidence but does not set the application status to 'Ready for Determination'.	In a batch cycle outside of business hours, PREE identifies applications which are in 'Submitted' status and have no unverified or in-Edit evidence. If a 'Determine if Application is Ready for Determination' task does not exist for this application, then one is generated.

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
INT-TP-006	This is to validate that a 'Past Due Application' task is generated when a submitted application has reached its due date and has no outstanding verifications.	Worker processes an application in 'Submitted' status, verifies all evidence but does not set the application status to 'Ready for Determination'. The due date for the application is reached.	In a batch cycle outside of business hours, PREE identifies applications which are in 'Submitted' status, have no unverified evidence and have reached the application due date. For each of these applications, if a 'Past Due Application' task does not already exist, then one is generated.
<CR103> **~~INT-TP-007~~**	~~This is to validate that an 'Auto Assessment Issue Notification - Application' notification is generated when there is an issue after Authorize All is clicked.~~	~~Worker clicks on Authorize All and there is an issue.~~	~~The 'Auto Assessment Issue Notification - Application' notification is generated with snippets related to the issue.~~
~~INT-TP-008~~	~~This is to validate that an 'Auto Assessment Issue Notification – COC' notification is generated when there is an issue after Accept of decision is clicked.~~	~~Worker clicks on Accept of decision and there is an issue.~~	~~The 'Auto Assessment Issue Notification – COC' notification is generated with snippets related to the issue.~~

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
~~INT-TP-009~~	~~This is to validate that an 'Auto Assessment Issue Notification – COC' notification is generated when there is an issue after Accept is clicked.~~	~~Worker clicks on Accept and there is an issue.~~	~~The 'Auto Assessment Issue Notification – COC' notification is generated with snippets related to the issue.~~

12 Related Documents

- Completed Case Management FDD
- Completed Evidence and Verification FDD
- Completed Intake Application Processing FDD
- Completed Management Reports FDD

13 Requirements Matrix

This section contains a Requirements Matrix that states the Requirement Description, if there is a Fit or Gap, and any Implementation Details. The Requirements Matrix only contains requirements pertaining to the implementation of the intake application and application processing functionality within PREE. All requirements for the PREE project are maintained in JIRA. Below is an extract from JIRA of the requirements related to Enhanced Workload Management FDD. The requirements and the implementation details listed below will also be included within the PREE Project Requirement Traceability Matrix. The 'Requirement Met OOTB Status' column represents PRMP's approval for the requirements SI has demonstrated have been met OOTB without modifications, or already met by Release 1. If 'N/A' is displayed within this column then modifications had to be made to satisfy the applicable requirement.

For requirement traceability purposes, the following requirements are met and mapped to this design document.

Table 13: Requirement Matrix

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
FR-INT-013	The Solution shall pre-populate the application when helpful, if the system knows something; it should include it on the application where appropriate.	Fit	The New Application on the IC has been modified to prepopulate the data of all the active household members on the IC as per Prepopulated Application via IC section in the Enhanced Workload Management FDD.	N/A
FR-WM-008	The Solution shall provide an automated method to balance workload based on configurable parameters defined by Puerto Rico.	Fit	Each region was given a work queue. Identified tasks associated to a person living in that region will be routed to that queue and all the caseworkers from the offices within that region will be able to work from this queue. This is to balance the workload throughout the region, instead of throughout the local office. The Regional Work Queues will also sort the tasks in priority order as defined in Regional Work Queue Prioritization Logic section in the Enhanced Workload Management FDD.	N/A

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.1	The Workflow/BPM component shall include business rules engine/capabilities (e.g., roles, responsibilities, policies, procedures, approvals, deadlines, integrations, etc.).	Fit	Cúram's Workflow Management System (WMS) includes Process Definitions, the Workflow Process Definition Tool (PDT), the Workflow Engine, the Inbox, Workflow Administration, approval process, and deadline logics. Cúram Security Roles are configurable to indicate caseworkers' roles and responsibilities within Cúram. Cúram's Rules Engines maintains PRMP policies.	N/A
T3.2.2	The Workflow/BPM component shall provide process execution and state management.	Fit	In the Workflow section within the Admin workspace, appropriate caseworkers will be able to determine if a workflow process has been completed or is in progress.	N/A
T3.2.6	The Workflow/BPM component shall provide robust Security functions.	Fit	Only identified security roles per work queue will be allowed to subscribe to the work queue as defined in Work Queue Subscription section in the Enhanced Workload Management FDD.	N/A

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.7	The Workflow/BPM component shall provide a registry for process components.	Fit	Cúram provides ability to create and maintain Process Definitions which can then be interpreted by the workflow engine. The Workflow Process Definition Tool (PDT) contains a library for the business methods (both Business Process Object (BPO) and entity methods) which are available for use by the workflow process definitions. On the Workflow page in the Admin workspace, appropriate caseworkers will be able to see a list of workflows. They can also see the list of activities for a workflow when they select it.	N/A
T3.2.8	The Workflow/BPM component shall provide robust Administration functions.	Fit	Cúram Workflow component can be accessed from the Administration Workspace. Those with a valid security role will be able to access the Workflow component.	N/A
T3.2.9	The Workflow/BPM component shall provide and/or integrate with a robust and easily configurable workflow engine.	Fit	Cúram provides a robust and easily configurable Workflow Management System (WMS).	N/A

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.10	The Workflow/BPM component shall include the capability to assign tasks to staff based on defined business rules.	Fit	In each FDD, there is a 'Tasks, Alerts, Work Queues' section with the details of any new or modified Tasks and their allocation strategy. In order to meet PRMP business rules, a task can be assigned to a specific caseworker or a work queue.	N/A
T3.2.11	The Workflow/BPM component shall include the capability to route work to the next person in a workflow based on process outcomes.	Fit	Cúram Workflow Management System (WMS) allows the system to route work to the next person in a workflow based on process outcomes. In each FDD, there is a 'Tasks, Alerts, Work Queues' section with the details of any new or modified tasks being routed to the next person based on process outcomes per PRMP business rules.	N/A
T3.2.12	The Workflow/BPM component shall provide an automated method to balance workload based on caseworker and work unit queues or skills and availability.	Fit	In each FDD, there is a 'Tasks, Alerts, Work Queues' section with the details of any new or modified Tasks and its allocation strategy. to meet PRMP business rules. Task allocation logic allows for workload to be balanced based on caseworkers and work queue.	N/A

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.13	The Workflow/BPM component shall provide a method to manually reassign workload based on caseworker input.	Fit	Caseworkers with the Supervisors security role can manually move the workload from a person/work queue and assign it to another person/work queue.	OOTB – Pending Approval
T3.2.14	The Workflow/BPM component shall support email (push) or on-line queries (pull) by a caseworker for work that is in their queue.	Fit	The "Get Next Task" functionality in Cúram functions as a pull, where caseworkers can pull the next task from the online work queue.	OOTB – Pending Approval
T3.2.15	The Workflow/BPM component shall provide data validation rules to ensure data integrity.	Fit	The Verification component in Cúram will force all items identified as required verification to be pushed to the Verification page on the IC. These items were identified during the Evidence and Verification FDD in R1. Verification will be provided by external agencies (interfaces) and/or by verification documents provided to a worker.	N/A

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.16	The Workflow/BPM component shall enforce workflow rules (with task checklists) to ensure that processes are completed correctly.	Fit	Cúram Workflow Management System (WMS) allows for both manual and automated steps in a business process. Task checklists refer to being able to set up multiple steps in a process. In each FDD, there is a 'Tasks, Alerts, Work Queues' section with the details of any new or modified steps of a workflow to meet PRMP business rules.	N/A
T3.2.18	The Workflow/BPM component shall provide for comprehensive case tracking as defined in requirements detailed during Workflow/BPM component configuration. The Workflow/BPM component shall log task status, case and contact history, issues, and any additional information as determine by Puerto Rico.	Fit	On the Task dashboard, workers will be able to view their task status. On the IC, workers will be able to view the case status, contact history and issues history.	OOTB – Pending Approval

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.19	The Workflow/BPM component shall track milestones and due dates and support notification of the appropriate parties about upcoming and overdue milestones.	Fit	On the Task dashboard, workers will be able to view their task status and due date. The due dates set on a task can be modified as needed on the workflow component by an authorized caseworker. Each task designed in an FDD will include the escalation strategy, when needed. A new task or notification can be sent to a supervisor per the triggers identified in the escalation strategy section. This can also be modified on the workflow component by an authorized caseworker. Cúram also displays milestones of other items, such as Application deadlines, certification end dates, etc. Members will be notified when a renewal is due, when a request for information is due, etc.	OOTB – Pending Approval
T3.2.21	The Workflow/BPM component shall support a visual/modeling tool to define business process flows.	Fit	A visual of each workflow can be viewed from the Administration Workspace within Workflow component.	N/A

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.23	The Workflow/BPM component shall provide the capability to tie business rules to workflows.	Fit	Cúram's Workflow Management System (WMS) provides the capability to tie business rules to workflow. In each FDD, there is a 'Tasks, Alerts, Work Queues' section with the details of any new or modified business rules to workflow.	N/A
T3.2.24	The Workflow/BPM component shall provide the capability to link a workflow to one or more workflows.	Fit	Cúram's Workflow Management System (WMS) provides the capability to link a workflow to one or more workflows. In each FDD, there is a 'Tasks, Alerts, Work Queues' section with the details of any new or modified linkages between workflows.	N/A
T3.2.25	The Workflow/BPM component shall provide the capability to suspend and resume a workflow that is incomplete.	Fit	Cúram's Workflow Management System (WMS) provides the capability to suspend and resume a workflow that is incomplete. Caseworkers with access to the Process Definition tool may resume suspended workflows by monitoring the process instance errors.	N/A

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
T3.2.27	The Workflow/BPM component shall provide all operational functions to manage Global and individual queues.	Fit	Cúram provides a large variety of functions to manage inbox (e.g., view tasks, search available tasks, get next task, my work queues, my notifications, task redirection and allocation, etc.).	OOTB – Pending Approval

14 Issue Register

This section contains a list of all the issues present at the time of submission.

Table 14: Issue Register

Issue #	Issue	Resolution	Resolution Date

15 Deliverable Schedule

Table 15: Deliverable Schedule

FDD Submission Schedule	Dates
FDD Submission Date:	

FDD Submission Schedule	Dates
PRMP Draft Review and Comment Period:	5 Business Days after receipt of draft FDD submission
Final Submission Due:	3 Business Days after receipt of draft comments
PRMP Final Approval Period:	2 Business days after receipt of updated deliverable version