



FEI Systems

Connecting Every Dimension of
Health and Human Services

FASAMS Requirements Document

Allow Configuration of Validation Rules WI 538474

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Are Pamphlet updates required? Yes <input type="checkbox"/> NO <input checked="" type="checkbox"/>	8

GENERAL

VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
1/12/2022	1.0	Jesse Lindsey	Initial document creation
2/11/2022	1.1	Renee Sessions	Update requirements

STAKEHOLDERS

Role	Name
FEI Implementation Manager	Jesse Lindsey
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FEI Product Manager	Jessica Knott
DCF OITS Project Director	Nathan McPherson
DCF SAMH Project Sponsor	Richard Power
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SUPPORTING DOCUMENTS AND REFERENCES

- Enhancement request form from DCF:
https://unite.feisystems.com/collab/FASAMS/_layouts/15/DocIdRedir.aspx?ID=FEIDOC-1387-207470

TERMS AND DEFINITIONS

Terms	Description

SCOPE

INITIAL REQUEST & ASSUMPTIONS

Business Statement

FEI and Managing Entities require the ability to enable/disable validation rules based on a configurable comparison date from within the FASAMS UI.

Scope Definition

FEI will update the Business Rules Workspace to include parameters for Effective Date and Expiration Date based on a data set comparison date.

FEI will also update the Rule Collection Window to display the new parameters as columns. Note: Fields will not be editable from the Rule Collection Window.

Finally, FEI will update the Rules export document to include the new parameters as columns.

Assumptions, Constraints, Dependencies

This enhancement applies only to FASAMS Version 14.

Note: Fields will not be editable from the Rule Collection Window.

EXISTING FUNCTIONALITY

Currently users are not able to configure validation rules based on a comparison date within the FASAMS UI.

PROPOSED FUNCTIONALITY

Within the Business Rule Workspace, users with the Edit Business Rules permission will be able to configure the effective and expiration date of validation rules based on a data set and comparison date (provided as dropdown menus).

Users with access to the Rule Collection Window will see the four new parameters displayed as columns: Data Set, Comparison Date, Effective Date, and Expiration Date.

Users with access to export the Rules will see the new parameters displayed as columns in the Excel export document.

INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	TFS Item #(s)	Description	Estimate/ Quote
1/12/2022	538474	Initial Estimate	Extra Large
2/9/2022	538474	Final Estimate	Final Estimate: Analysis – 40 Dev – 220 Test – 180 Acct / Project Management – 12 Total – 452

REQUIREMENTS

FEI will update the Business Rules Workspace to include parameters for Effective Date and Expiration Date based on a data set comparison date.

Note: The Data Set dropdown will include a list populated with only the current data set or “upstream” (parent) data sets for the selected rule collection.

The Comparison Date dropdown will include a list populated with date fields from the selected data set plus SubmissionDate.

FEI will also update the Rule Collection Window and Rules export document to include the new parameters as columns.

NOTES TO DEVELOPER

Mockups provided below reflect proposed functionality.

1. UPDATE BUSINESS RULE WORKSPACE



Mockup 1 (above): Proposed functionality for Business Rule Workspace

Req. ID	Requirement	Ref. ID	Dev	QA
1.0	Update Business Rule Workspace to include new parameters			
1.1	Add 'Data Set' dropdown menu <ul style="list-style-type: none"> • Dropdown menu should: <ul style="list-style-type: none"> ○ Only include data sets that exist within the same version of the system ○ Include only the current data set or parent data sets for the selected rule collection <ul style="list-style-type: none"> ▪ Ex: If rule collection 'Treatment Episode Version 14 Data Set' is selected, then only Version 14 data sets should appear and should only include Provider, Client, and TreatmentEpisode data sets in the list. 	A		
1.2	Add 'Comparison Date' dropdown menu <ul style="list-style-type: none"> • Dropdown menu should populate based on the Data Set selected in 1.1 • SubmissionDate should always be populated at the top of the dropdown list <ul style="list-style-type: none"> ○ This selection uses the record submission date when determining the effective/expiration date of the rule ○ Ex: If 'Treatment Episode Version 14 Data Set' rule collection is selected, then the SubmissionDate field should show at the top of the list and then all date fields from TreatmentEpisode should appear in the 'Comparison Date' dropdown • The dropdown items should include the Entity and the Field name following the format 'FieldEntity.FieldName' <ul style="list-style-type: none"> ○ Exception: SubmissionDate will not include a field entity prefix • For FASAMS Version 14, the dropdown list for each data set should populate as follows in rows 1.2.1-1.2.8 	B	<input type="checkbox"/>	<input type="checkbox"/>
1.2.1	Expected Comparison Date dropdown list for 'Provider Version 14 Data Set': <ul style="list-style-type: none"> • SubmissionDate • ProviderSite.OpenDate • ProviderSite.CloseDate 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.2	Expected Comparison Date dropdown list for 'Client Version 14 Data Set': <ul style="list-style-type: none"> • SubmissionDate • ProviderClient.BirthDate 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.3	Expected Comparison Date dropdown list for 'Treatment Episode Version 14 Data Set': <ul style="list-style-type: none"> • SubmissionDate • Admission.AdmissionDate • PlacementRecord.StartDate • PlacementRecord.End Date 			

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> PerformanceOutcomeMeasure.PerformanceOutcomeMeasureDate Health.ExpectedDeliveryDate Health.ActualDeliveryDate Evaluation.EvaluationDate Evaluation.DeterminationDate Diagnosis.StartDate Diagnosis.EndDate Discharge.DischargeDate Discharge.LastContactDate ImmediateDischarge.EvaluationDate 			
1.2.4	Expected Comparison Date dropdown list for 'Service Event Version 14 Data Set': <ul style="list-style-type: none"> SubmissionDate ServiceEvent.ServiceDate ServiceEvent.InvoicedDate ServiceEvent.PaidDate 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.5	Expected Comparison Date dropdown list for 'Waiting List Version 14 Data Set': <ul style="list-style-type: none"> SubmissionDate WaitingList.LevelOfCareEvaluationDate WaitingList.PlacementDate WaitingList.OutcomeDate 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.6	Expected Comparison Date dropdown list for 'Acute Care Version 14 Data Set': <ul style="list-style-type: none"> SubmissionDate BedCapacity.EffectiveDate BedUtilization.CensusDate 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.7	Expected Comparison Date dropdown list for 'Subcontract Version 14 Data Set': <ul style="list-style-type: none"> SubmissionDate Subcontract.EffectiveDate Subcontract.ExpirationDate Subcontract.AmendmentDate SubcontractService.EffectiveDate SubcontractService.ExpirationDate 		<input type="checkbox"/>	<input type="checkbox"/>
1.2.8	Expected Comparison Date dropdown list for 'Contracts Version 14 Data Set': <ul style="list-style-type: none"> SubmissionDate ContractTarget.AmendmentDate 		<input type="checkbox"/>	<input type="checkbox"/>
1.3	Add 'Effective Date' datepicker <ul style="list-style-type: none"> The rule should be disabled for records that occur prior to the Effective Date for the Comparison Date field selected <ul style="list-style-type: none"> Example: If the rule 'CGAS Required for first Evaluation in Admission' has a Comparison Date of AdmissionDate with an Effective Date = 1/1/2021, then the rule should not reject records that do not contain a CGAS if the AdmissionDate is prior to 1/1/2021 Can be null <ul style="list-style-type: none"> Means no Effective Date applies; rule is enabled 	C	<input type="checkbox"/>	<input type="checkbox"/>
1.4	Add 'Expiration Date' datepicker <ul style="list-style-type: none"> The rule should be disabled for records that occur after the Expiration Date for the Comparison Date field selected <ul style="list-style-type: none"> Example: If rule 'CGAS Required for first Evaluation in Admission' has a Comparison Date of AdmissionDate with an Expiration Date = 1/1/2022, then the 	D	<input type="checkbox"/>	<input type="checkbox"/>

Req. ID	Requirement	Ref. ID	Dev	QA
	rule should not reject records that do not contain a CGAS if the AdmissionDate is after 1/1/2022 <ul style="list-style-type: none"> • Can be null <ul style="list-style-type: none"> ○ Means no Expiration Date applies; rule is enabled 			

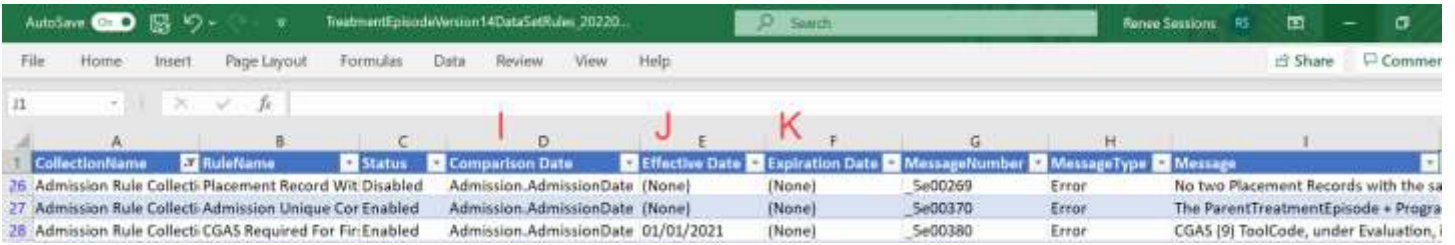
2. UPDATE RULE COLLECTION WINDOW



Mockup 2 (above): Proposed functionality for Rule Collection Window

Req. ID	Requirement	Ref. ID	Dev	QA
2.0	Update the Rule Collection Window for each data set to include new columns			
2.1	Add new column: <ul style="list-style-type: none"> • Column name: 'Data Set' • Display the Data Set selected for the specific rule, per 1.1 <ul style="list-style-type: none"> ○ If no Data Set is selected for the specific rule, display the default data set based on code 	E		
2.2	Add new column: <ul style="list-style-type: none"> • Column name: 'Comparison Date' • Display the Comparison Date selected for the specific rule, per 1.2 <ul style="list-style-type: none"> ○ If no Comparison Date is selected for the specific rule, display the default comparison date based on code 	F	<input type="checkbox"/>	<input type="checkbox"/>
2.3	Add new column: <ul style="list-style-type: none"> • Column name: 'Effective Date' • Populates the Effective Date based on the specific rule <ul style="list-style-type: none"> ○ If no Effective Date is selected for the specific rule, display '(None)' • Can be null <ul style="list-style-type: none"> ○ Means no Effective Date applies; rule is enabled 	G	<input type="checkbox"/>	<input type="checkbox"/>
2.4	Add new column: <ul style="list-style-type: none"> • Column name: 'Expiration Date' • Populates the Expiration Date based on the specific rule <ul style="list-style-type: none"> ○ If no Expiration Date is selected for the specific rule, display '(None)' • Can be null <ul style="list-style-type: none"> ○ Means no Expiration Date applies; rule is enabled 	H	<input type="checkbox"/>	<input type="checkbox"/>

3. UPDATE RULES EXPORT DOCUMENT



CollectionName	RuleName	Status	Comparison Date	Effective Date	Expiration Date	MessageNumber	MessageType	Message
26	Admission Rule Collecti-Placement Record Wit Disabled		Admission.AdmissionDate (None)	(None)	(None)	_Se00269	Error	No two Placement Records with the sa
27	Admission Rule Collecti-Admission Unique Cor Enabled		Admission.AdmissionDate (None)	(None)	(None)	_Se00370	Error	The ParentTreatmentEpisode + Progra
28	Admission Rule Collecti-CGAS Required For Fir Enabled		Admission.AdmissionDate 01/01/2021	(None)	(None)	_Se00380	Error	CGAS [9] ToolCode, under Evaluation, i

Mockup 3 (above): Proposed functionality for Rules export document

Req. ID	Requirement	Ref. ID	Dev	QA
3.0	Update rules export document to include new columns. <ul style="list-style-type: none"> Export format: Excel Placement: columns D, E, and F <ul style="list-style-type: none"> Existing columns shift right 			
3.1	Add new column: <ul style="list-style-type: none"> Column name: 'Comparison Date' Display the Comparison Date selected for the specific rule <ul style="list-style-type: none"> If no Comparison Date is selected for the specific rule, display the default comparison date based on code 	I	<input type="checkbox"/>	<input type="checkbox"/>
3.2	Add new column: <ul style="list-style-type: none"> Column name: 'Effective Date' Populates the Effective Date based on the specific rule <ul style="list-style-type: none"> If no Effective Date is selected for the specific rule, display '(None)' 	J	<input type="checkbox"/>	<input type="checkbox"/>
3.3	Add new column: <ul style="list-style-type: none"> Column name: 'Expiration Date' Populates the Expiration Date based on the specific rule <ul style="list-style-type: none"> If no Expiration Date is selected for the specific rule, display '(None)' 	K	<input type="checkbox"/>	<input type="checkbox"/>

4. LOAD DATA SETS & COMPARISON DATES USING DEFAULT VALUES IN CODE

Req. ID	Requirement	Ref. ID	Dev	QA
4.0	Load data sets and comparison dates using the default values in the code <ul style="list-style-type: none"> For example: If a rule is in the Evaluation entity, TreatmentEpisode would appear and EvaluationDate would be the Comparison Date Note: Setup must be valid Program Area in Service Event 		<input type="checkbox"/>	<input type="checkbox"/>

ARE PAMPHLET UPDATES REQUIRED? YES NO

Update ID	Pamphlet Chapter/Sections requiring change	Completed by FEI	Approved by DCF
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>