



FEI Systems

Connecting Every Dimension of  
Health and Human Services

# FASAMS Requirements Document

---

## Add Ability to Track Referrals WI 8347

---

Created by: Jesse Lindsey

Dated: 7/9/2019

## CONTENTS

General.....	3
Version Control .....	3
Stakeholders .....	3
Supporting Documents and References .....	3
Terms and Definitions .....	3
Scope.....	3
Initial Request & Assumptions .....	3
Business Statement.....	3
Scope Definition .....	3
Existing Functionality .....	3
Proposed Functionality .....	4
Initial Estimate/ Quote History .....	4
Requirements.....	4
1. Update Immediate Discharge entity .....	4

## GENERAL

### VERSION CONTROL

Date	Version	Author(s)	Brief Description of Change
7/9/2019	1.0	Jesse Lindsey	Initial document creation
7/22/2019	1.1	Jesse Lindsey	Update document after JAD
7/23/2019	1.2	Yiwen Ma	FEi Internal Review

### STAKEHOLDERS

Role	Name
FEI Business Analyst	Jesse Lindsey
FEI Account Manager	Kory Schnoor
DCF SAMH Project Director	Nathan McPherson
DCF SAMH Project Sponsor	Sen-Yoni Musingo / Adam L. Wasserman
DCF Business Analyst	Gregory Nix / Victor Gaines

### SUPPORTING DOCUMENTS AND REFERENCES

- [0001 Track Referrals \(8347\)](#)

### TERMS AND DEFINITIONS

Terms	Description

## SCOPE

### INITIAL REQUEST & ASSUMPTIONS

#### *Business Statement*

The DCF business unit needs a way to track when an individual is evaluated, not admitted, and referred to another provider for services.

#### *Scope Definition*

This enhancement will add four new fields to the Immediate Discharge entity within the Treatment Episode data set. The new fields are ReferredToProviderName, ReferredToTreatmentSettingCode, ReferredToCoveredServiceCode and/or ReferredToProjectCode and all rules associated with each field.

### EXISTING FUNCTIONALITY

Currently there is no ability to submit or track referrals to FASAMS. Treatment Episode Immediate Discharge entity currently accepts the following fields:

- SourceRecordIdentifier
- StaffEducationLevelCode
- StaffIdentifier

- EvaluationDate
- Note
- SiteIdentifier
- ProgramAreaCode
- ContractNumber

### PROPOSED FUNCTIONALITY

Add the following fields to Treatment Episode Immediate Discharge entity:

- **ProviderReferredTo** –
  - Identifies the Provider, if any, to which the client was referred
- **ReferredToTreatmentSettingCode** –
  - Identifies the Treatment Setting , if any, to which the client was referred
  - Must be a Treatment Setting in FASAMS
- **ReferredToCoveredServiceCode** –
  - Identifies the Covered Service, if any, to which the client was referred
  - Must be a valid CoveredServiceCode value. Valid values are listed in the Covered Service or Project section in Appendix 1 Data Code Values of Pamphlet 155-2
- **ReferredToProjectCode** –
  - Identifies the Project, if any, to which the client was referred
  - Must be a valid ProjectCode value. Valid values are listed in the Covered Service or Project section in Appendix 1 Data Code Values of Pamphlet 155-2

### INITIAL ESTIMATE/ QUOTE HISTORY

Phase/ Quote Date	Item(s)	Description	Estimate/ Quote
5/9/2019	10005	Initial Estimate	90-180
7/23/2019	10005	Final Estimate	Final Estimate: Dev -- 32 Test -- 32 Analysis -- 16 AM/PM -- 10 Total: 90

## REQUIREMENTS

### 1. UPDATE IMMEDIATE DISCHARGE ENTITY

Req. ID	Requirement	Ref. ID	Dev	QA
1.1	Add New Field: <ul style="list-style-type: none"> <li>• Field Name: <b>ProviderReferredTo</b></li> </ul>			
1.1.1	Implement these rules on the new field above: <ul style="list-style-type: none"> <li>• Value Type: string</li> <li>• Must be 100 characters or less</li> </ul>			

Req. ID	Requirement	Ref. ID	Dev	QA
	<ul style="list-style-type: none"> <li>Optional field</li> </ul>			
1.2	Add New Field: <ul style="list-style-type: none"> <li>Field Name: <b>ReferredToTreatmentSettingCode</b></li> </ul>			
1.2.1	Implement these rules on the new field above: <ul style="list-style-type: none"> <li>Value Type: string</li> <li>Must be one of the valid TreatmentSettingCodes in the vocabulary module</li> <li>Optional field</li> </ul>			
1.3	Add New Field: <ul style="list-style-type: none"> <li>Field Name: <b>ReferredToCoveredServiceCode</b></li> </ul>			
1.3.1	Implement these rules on the new field above: <ul style="list-style-type: none"> <li>Value Type: string</li> <li>Must be a valid CoveredServiceCode value. Valid values are listed in the Covered Service or Project section in Appendix 1 Data Code Values of Pamphlet 155-2</li> <li>Optional field</li> </ul>			
1.4	Add New Field: <ul style="list-style-type: none"> <li>Field Name: <b>ReferredToProjectCode</b></li> </ul>			
1.4.1	Implement these rules on the new field above: <ul style="list-style-type: none"> <li>Value Type: string</li> <li>Must be a valid ProjectCode value. Valid values are listed in the Covered Service or Project section in Appendix 1 Data Code Values of Pamphlet 155-2</li> <li>Optional field</li> </ul>			