February 2021 REM Enhancements

WO-331: REM Emergency Enhancements

1. Update REM Client Summary Report to Ensure Diagnosis Info Pulls from Active and Approved REM Intake Form

Description:

The REM Client Summary Report, report type "Active REM Clients with REM Diagnosis Expiration Between (date to date)" should pull the REM Qualifying Diagnosis from the most recent Approved REM Intake form (not the most recent Denied or in-progress form).

Acceptance Criteria:

1. The REM Client Summary Report, report type "Active REM Clients with REM Diagnosis Expiration Between (date to date)" should pull the REM Qualifying Diagnosis from the most recent Approved REM Intake form (not the most recent Denied or in-progress form).
   a. The output column "REM Age-Out Date" should follow this logic.
   b. This report should only include clients who are currently enrolled in REM (Active Approved REM ODF). A client should not appear in this report if they were disenrolled prior to their age-out date. (REM End Date in REM Disenroll ODF should be less than REM Age Out Date)
   c. The REM Age Out Date field should always be populated from the most recent approved REM Intake Form.
   d. The results should show all clients currently enrolled in REM, regardless of CMA assignment.

REM Intake - Summary Status: Approved REM Intake Number: REM007164

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▸ **Case Summary**

▸ **Case Information**

▾ **Clinical Information**

Medical Diagnosis

Medical Diagnosis # 1

ICD Code:	Q897
Description:	Multiple congenital malformations, not elsewhere classified
Special Program Code:	CON
REM Qualifying Diagnosis For Enrollment	☑

⚠ Participant does not meet the age requirements for this REM diagnosis

MD Signature	☐
License #:	
Date:	N/A

Start Date (mm/dd/yyyy) 1/1/2021 12:00:00 AM ☐ NULL   End Date (mm/dd/yyyy)* 1/26/2021 12:00:00 AM   View Report
Report Type* Active REM Clients with REM Diagnosis Expiration between ▾ Age Out N/A ▾
REM Diagnosis Search   REM Diagnosis B20 - Human immunodeficiency virus ▾

|◄ ◄ 1 of 1 ► ►| ⟳ 💾▾

Date Created: 1/26/2021 8:59:29 AM

REM Client Summary Report

Search Criteria:

Start Date:	1/1/2021
End Date:	1/26/2021
Report Type:	Active REM Clients with REM Diagnosis Expiration between
REM Diagnosis Search:	
REM Diagnosis:	⊞ 308 Value were selected in the input, click + to see all
Report Date:	01/26/2021

Total Number of Records Returned: 5

Total: 6

Client ID	MA #	Client First Name	Client Last Name	DOB	Age	Minor/Adult	REM Qualifying Diagnosis	REM Age out Date	REM Disenrollment Date	Assigned Agency	Assigned CMA Case Manager	Assigned CMA Supervisor
2160079AA951210	46004220400			1/16/2010	11	Minor	Q897 - Multiple congenital malformations, not elsewhere classified	1/15/2021	N/A	TCC	Ellen Centineo	Mark Acosta

ID:

2. Do Not Auto Generate Annual REM Assessment for Disenrolled or Clients Assigned to MDH

Description:

No Annual REM Assessment should be auto-generated for a client who is not currently enrolled in the REM program (does not have an Active Approved REM ODF) or who is assigned to MDH REM.

Acceptance Criteria:

1. No Annual REM Assessment should be auto-generated for a client who is not currently enrolled in the REM program (does not have an Active Approved REM ODF).
2. Update business rules so that an Annual REM Assessment should not auto-generate if a client is assigned to MDH REM as REM CMA. If the client is re-assigned to REM CMA within 335-365 days of the previously submitted REM Assessment, then the system should still auto-generate the Annual assessment. But after 365 days do not auto-generate. However, users will continue to have the ability to manually create the annual assessment.

3. Update Logic for REM Age Out to Ensure it Pulls from Active and Approved REM Intake Form

Description:

REM Age out needs an update to the logic in various modules such as REM Age Letters, REM Age Out Alert, REM Assessment, REM PDN Assessment etc.

Acceptance Criteria:
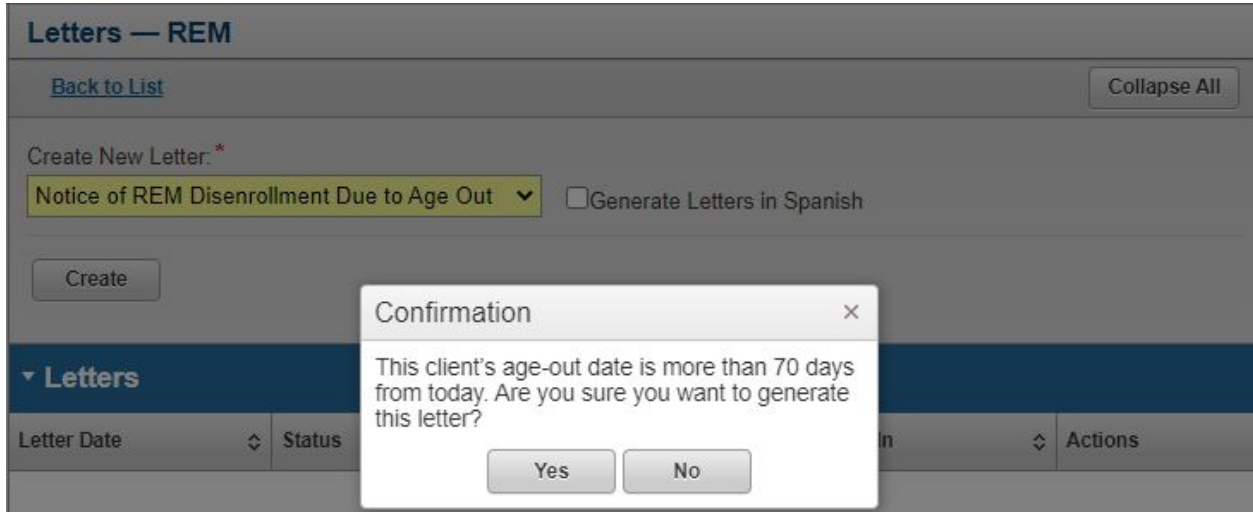
Age-Out Date Source Logic

1. REM Age-out date should be generated from the most Approved and Active REM Intake Form. Currently the system is pulling the age-out date from the most recent REM Intake Form even when it is denied. It should not consider a denied intake when determining the age-out date.

Age-Out Letter Precondition

1. Remove the precondition that restricts MDH to creating a REM Age-out Letter only when the REM age-out date is within 70 days. Users should be able to generate a REM age-out Letter at any time.

2. Create a warning that pops up if the letter is being generated more than 70 days before the age-out date.
   a. "This client's age-out date is more than 70 days from today. Are you sure you want to generate this letter?"
      i. Yes or No

Age-Out Letter Data

1. When a REM Age-Out Letter is generated it should contain data based on the above age-out date source logic (Approved and Active REM Intake).

Age-Out Alert

1. The existing Alert notifies the user 70 days prior to the age-out date. It notifies the user that they should create an age-out letter.
   a. This Alert should be generated based on the age-out date logic noted above. (Approved and Active REM Intake).

4. Prepopulate CMP Goal Progress Notes from Latest CMP to the Next

Description:
When a new REM Case Management Plan is created the Goal Progress Notes that have not been marked as 'Achieved' and 'No Longer Required' on the previous CMP should be copied over into the new CMP Goal Progress Notes

Acceptance Criteria:
1. When a new REM Case Management Plan is created the Goal Progress Notes that have not been marked as 'Achieved' and 'No Longer Required' on the previous CMP should be copied over into the new CMP Goal Progress Notes
   a. The date the note was created should copy over.
      i. Display the original create date of the pre-populated note.
      ii. Update Print to display Original Create Date for pre-populated Notes.

5. Update CMP Due Date within Alert to Match the Actual Due Date and Not the Revision Start Date

Description:

Synchronize the CMP Due Date on the CMP List page and the date listed in the Alert that goes out to users.

Acceptance Criteria:

Synchronize the CMP Due Date on the CMP List page and the date listed in the Alert that goes out to users alerting them of the CMP being due. Both dates should reflect the actual date that the CMP is due (must be submitted/Approved).

      a.   Currently the alert lists a date to start work on a CMP rather than the due date. This causes confusion with users. We want the user to see the actual due date.

      b.   This applies for Initial CMP alert. (No other alert on due date)

6. Modifications to All REM My List to Only Show Clients Actively Assigned to that Users Agency as the REM CMA

Description:

My Lists visible to REM CMA users should only show names of clients who are actively assigned to REM CMA.

Acceptance Criteria:

My Lists visible to REM CMA users should only show names of clients who are actively assigned to REM CMA. Currently REM CMA users are seeing clients who are not assigned to REM CMA in their My Lists. Make this change to all of the 'Show Me' options under each of the following respective My List areas for REM.

- REM Intake
- Service Coordination
- REM Assessment
- REM LOC
- REM Case Management Plan
- REM PCP Selection
- REM PDN Assessment
- REM My Clients List
- REM RE My List

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7. Allow Specific Users to Manually Add an Annual REM Assessment

Description:

Create a process that allows specific users to manually add an Annual REM Assessment for a client.

Acceptance Criteria:

Create a process to manually add an Annual REM Assessment for any currently enrolled REM client (similar to how you can add a Significant Change REM Assessment).

- 'Add Annual REM Assessment': This function should be available to MDH REM Admin and CMA REM Admin users (Only if their agency is actively assigned).
- This function should be available from the time the client gets their initial REM assessment submitted and is actively enrolled in REM.
- It should only add a REM Assessment if there is no Open REM Assessment available and if there is already an existing submitted Initial REM Assessment.
- Upon use of this action system should generate an Annual type of REM Assessment.
- Any existing rules such as Pre-populations etc while generation Annual REM assessment should remain as is.

8. Turn Off the Ability to Add Progress Notes within CMP and Make All Historical Progress Notes View Only

Description:

Users should not be allowed to edit or add any new progress notes in REM CMP module.

Any existing Progress Notes should still be viewable.

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Acceptance Criteria:

On the CMP, remove the ability for users to add Progress Notes. Note that existing progress notes should remain viewable, but users should no longer have the ability to add new ones moving forward for any of the submitted, open and new REM CMPs.
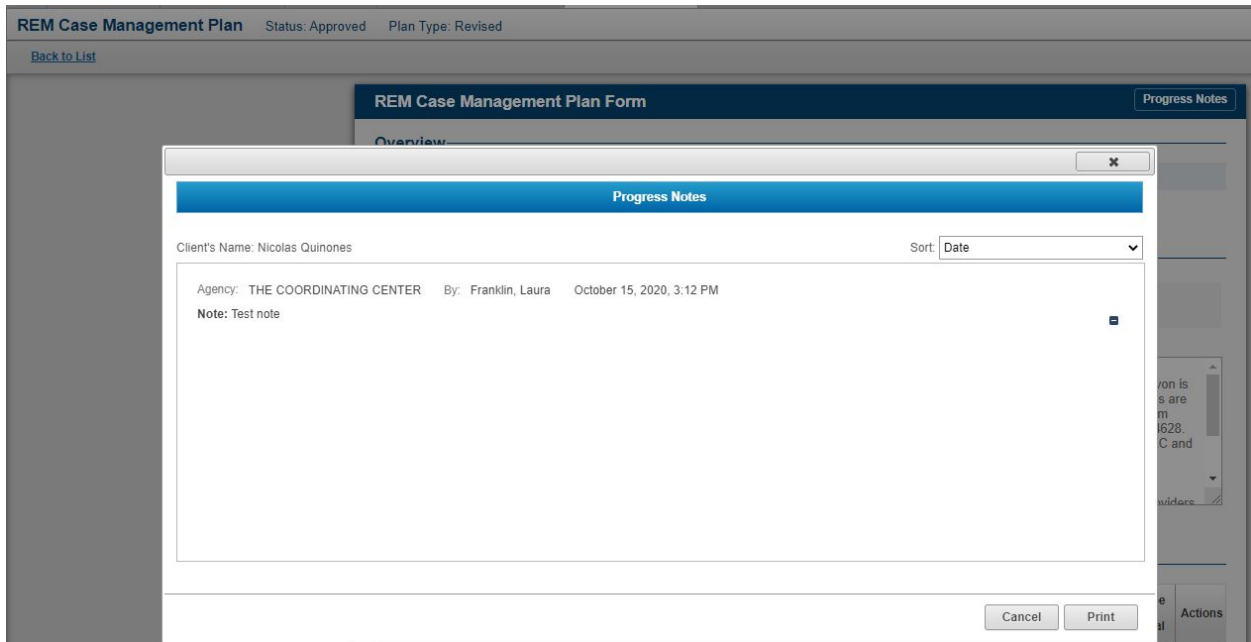
9. Remove the Business Rule that Deactivates a CMP Upon REM Denial or Disenrollment

Remove the business rules for active inactive that enforces the CMPs to become Inactive if the client has an active denial ODF or active disenroll ODF or active Decline ODF.

Acceptance Criteria:

- Remove the business rules for active inactive that enforces the CMPs to become Inactive if the client has an active denial ODF or active disenroll ODF or active Decline ODF.
  - Note: this rule change will only be applicable going forward.
- For REM Qualifying Diagnosis Field: Use the REM Q Dx from the Active Approved Intake. Leave blank if no Active Approved Intake exists. Do not check for enrollment: some clients may get a CMP prior to enrolled ODF but after Approved Intake.

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10. Data Patch to Correct REM Intake Referrals Listed As Active and Ensure Data in Letters Pulls from Active and Approved REM Intake Referral

Description:

Active/Inactive Denied REM Intake logic needs to be updated and also ODF and Denial Letters that a denied intake impacts.

Acceptance Criteria:

Denied REM Intake needs to update as following:

- Any REM Intake submitted as Denied should remain Inactive leaving the previously Active Intake still Active.
- If the Client's 1st REM Intake is denied then allow the user to add a REM ODF with all the selections open (Approve, Deny, Decline)
  - To do a Deny ODF for REM user should not need an Active REM Intake Referral but to do an Approve REM ODF user should be required to have an Active REM Intake Referral.
  - MCO field in the ODF should be Pre-populated from the latest submitted (Approved/Denied) REM Intake.
- Data patch to address existing data where if the clients currently active REM Intake form is a Denial it should be set to Inactive and simultaneously reactivate their latest Approved REM Intake Form
- Applicant Denial Letter and Applicant Reconsideration Denial Letter both pre-populate MCO and Referral source information in CC fields from the active REM Intake. update the logic for these 2 letters to pre-populate this information from the latest denied REM Intake.

CR 330197 – REM LOC Updates Requirement Specification

1. Add New Fields in LOC + Data Patch for Open Forms

Description:

Add new fields to the REM LOC form that should be read-only fields called 'Previous LOC Type' and 'Previous Effective Date' and also display "CMA REM Supervisor" in Edit, View and Global Print which should pre-populate with the LOC Type and Effective Date from the client's latest/previous Approved REM LOC form and the selected CMA REM Supervisor from the LOC form

Acceptance Criteria:

- The new fields "Previous LOC Type" and "Previous Effective Date", "CMA REM Supervisor" should be displayed on Edit Page, View Page and Global Print. See below screenshot for a Mockup.
- For the first LOC system should display NA in these fields.
- Applicable to New or Open forms only.
- Data Patch these fields in open forms from the previously approved LOC.
- Removal of the Pop-up from the submit action from the view page of "In Progress" & "Clarification Requested" status of LOC.

2. REM LOC My List Update

Description:

Make Updates to REM LOC My List for the Show Me option 'All Clients with Pending CMA Supervisor Review or Clarification Requested' and 'My Clients with Pending CMA Supervisor Review or Clarification Requested'

Acceptance Criteria:

Make Updates to REM LOC My List for the Show Me option 'All Clients with Pending CMA Supervisor Review or Clarification Requested' and 'My Clients with Pending CMA Supervisor Review or Clarification Requested'

- Retitle the current output column 'Assigned to' to 'Assigned REM CM'
- Add a new output column to the right of 'Assigned REM CM' called 'Requested LOC Reviewer' which should display the name of the REM CMA Supervisor selected on that specific REM LOC form that is responsible for conducting the review.

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3. Modify the Create LOC Pop-up window

Acceptance Criteria:

1. Modify the 'Create LOC' popup window that appears when an authorized user clicks the 'Add' function for a REM LOC.
   a. Currently the user has the ability to specify 'LOC Type' and 'LOC Month.' Want to add the following two additional fields that are currently only present after doing the initiation save:
      i. Additional Comments
      ii. CMA REM Supervisor
   b. Ensure that the field 'CMA REM Supervisor' is listed on the actual form in the same location as the other fields on the Edit page
      i. This would allow for the field to be updated in the event the assigned supervisor for review needed to be changed at any point during the process.

2. Create a function called 'Save & Submit for Supervisor Review' on the initial 'Create LOC' page so that if the user wants to enter all the necessary information and immediately submit for supervisor review, then using this function would process the form and immediately take it from 'In Progress' to 'Pending CMA Supervisor Review.'
   Note: the existing alert to the Supervisor selected when the form transitions from In Progress status to Pending Supervisor Review should still be triggered from this pop-up.

3. If the user selects 'Save & Close' from the Create LOC pop-up, then all information entered should be pre-populated on the REM LOC form.

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CR 330209 – REM Program Status Updates for Pending and Denied

1. REM: Program Snapshot update 'Pending' Status

System should mark a client "Pending" in Program Snapshot for REM in certain cases.

Acceptance Criteria:

System should mark a client "Pending" in Program Snapshot for REM if:

- If a client currently has no REM status, then the client should be marked as 'Pending' only when the REM Intake Form is created.

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○ The client should remain in the 'Pending' status until a REM Overall Decision form is submitted for that client, converting them to 'Disenrolled,' 'Denied' or 'Enrolled.

○ If a REM Intake is discarded, then the "Pending" status should be removed from the Program Snapshot. (REM row should be cleared)

● If a client currently has a REM status of 'Denied' or 'Disenrolled' and a new REM Intake Form is created, the REM status should be changed back to 'Pending' because this implies the client is reapplying to the REM. For this change, the system should ensure that this only happens if the REM Intake Form is added after the REM Overall Decision form that made the client 'Denied' or 'Disenrolled.'

○ If the REM Intake form that triggered the update from "Denied or Disenrolled" to "Pending" is discarded, then revert the status back to the previous "Denied" or "Disenrolled"

○ Note: Enrolled, Denied, Disenrolled are already existing in the current system.

2. REM: Change of Status in Program Snapshot

System should change the enrollment status of the client in Program Snapshot's REM Row for certain scenarios.

Acceptance Criteria:

System should change the enrollment status of the client in Program Snapshot's REM Row for certain scenarios.

● Keep 'Enrolled': If a client currently has a REM status of 'Enrolled' and a new REM Intake Form is created, the REM status should remain unchanged because the client is already enrolled.

- 'Denied': If the clients latest submitted REM ODF has a Decision = Declined, the system should treat this the same as Decision = Denial and display the REM Program Status as **'Denied'** in the Program Snapshot section of the Client Summary where REM Program Status is displayed.

3. All the existing REM Clients should get a status in Program Snapshot

All the existing REM Clients should get a status in Program Snapshot.

Acceptance Criteria:

All the existing REM Clients should get a status (Pending, Enrolled, Denied, Disenrolled) in Program Snapshot.

All the scenarios should be applied to production in existing data:

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- Pending: Any client with a REM Intake created and no ODF yet or Any client with a REM ODF "Denied or Disenrolled" and gets a new RIF created after the fact.
- Keep 'Enrolled': If a client currently has a REM status of 'Enrolled' and a new REM Intake Form is created, the REM status should remain unchanged because the client is already enrolled.
- 'Denied'= Declined: If the clients latest submitted REM ODF has a Decision = Declined, the system should treat this the same as Decision = Denial and display the REM Program Status as **'Denied'** in the Program Snapshot section of the Client Summary where REM Program Status is displayed. For Decline cases pre-populate the 'Last Denial Date' in Program Snapshot from Decline ODF's "Decline Date" field.