

SOUNDEX MODULE

October 21, 1999

SWSS Project USER REQUIREMENTS

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1 INTRODUCTION

1.1 Purpose

The Soundex process as an automated search for cases and persons with prior SWSS history. It will help to avoid duplication of case records and will support an efficient and effective method of locating specified data. This process will also help to identify any duplicate case records that are inadvertently added.

The purpose of using the Soundex module in SWSS is to find existing information on the database about persons that may be added to a case, or about children and their previous case history.

1.2 Target Audience

This document is intended for SWSS development staff, who will be developing a Detailed Design document to address the requirements listed in this document. It will also be of interest to development staff charged with maintaining the SWSS automated system.

The following personnel may also be interested:

- SWSS Trainers
- FIA Help desk personnel
- SWSS advance users
- SWSS project staff tasked with developing the User's guide
- Zone Children's services specialists
- CFS Policy staff

2 MODULE NARRATIVE

The current business process for locating case history involves a mandatory file clearance check on the Client Information System (CIS) for the child. This search is usually the function that is done by a clerical unit but may be done by anyone with Inquiry status on ASSIST/CIS. The information as to whether a record was or was not located is normally documented on an FIA-133a.

3 NAVIGATION FLOW

3.1 Screen Interaction

An automated system must allow the user to perform a search with a limited amount of detail when adding a new case or a new member to an established case. A screen is needed to allow the user to input the search parameters. There also needs to be a display of the results of the search. The user must have the option of making a selection from the search, not using any of the search data or starting a new search.

3.2 System Flow

There are no modules that depend on the data entered in this module.

4 REQUIREMENTS LIST

The comprehensive (we hope) list of requirements derived from the original requirements, ensuing memos, emails, and test plan documentation.

4.1 Screen, Data, Out-of-Module, Output, Module and Miscellaneous Requirements

The following requirements were derived from the original requirements documents written by policy staff for the SWSS project. Any ensuing memos, emails, or test plans regarding the project were also searched. It is intended to be a comprehensive list of all requirements pertaining to the Soundex module. Each individual requirement has a unique identifier; the two letter prefix identifies this particular module (SO = soundex).

The list is to be used in a Requirements Traceability Matrix, which will be comprised of all the requirements for all the SWSS modules, so that the status of each requirement can be tracked and verified.

SO-1 SCREEN REQUIREMENTS:

- SO-1.1 There must be a client name search screen when adding a new case; i.e., an "Add New Client Name Search" screen. It must be able to find people that match a limited number of search criteria and return information about them and their case history within SWSS.
- SO-1.1.1 The add new client name search screen must accept the following search parameters:
 - SO-1.1.1.1 Last name
 - SO-1.1.1.2 First name
 - SO-1.1.1.3 sex
 - SO-1.1.1.4 Date of birth
 - SO-1.1.1.5 Legal status
 - SO-1.1.1.5.1 Dual Legal statuses of 52 and 90-94 are not to be included as a selection for the 'Add New' process.
 - SO-1.1.1.6 Case number
 - SO-1.1.1.7 Client id
 - SO-1.1.1.8 Social security number
- SO-1.1.2 The search result should return the following case information:
 - SO-1.1.2.1 County code
 - SO-1.1.2.2 Last name

- SO-1.1.2.3 First name
- SO-1.1.2.4 Middle name
- SO-1.1.2.5 AKA/FKA indicator
- SO-1.1.2.6 Social security number
- SO-1.1.2.7 Client ID
- SO-1.1.2.8 Date of birth
- SO-1.1.2.9 Sex
- SO-1.1.2.10 Race
- SO-1.1.3 The user must be able to view the search results by county or statewide.
- SO-1.1.4 Selecting one of the records from the search must display the list of cases with which this client was associated as the case child, and must display the following information:
 - SO-1.1.4.1 Log number
 - SO-1.1.4.2 Open date
 - SO-1.1.4.3 Case number
 - SO-1.1.4.4 Assigned worker's load number
 - SO-1.1.4.5 Program (Foster Care, Juvenile Justice, Or Adoption)
 - SO-1.1.4.6 Case state (unregistered, registered, open, closed, withdrawn)
- SO-1.1.5 Selecting one of the cases from the list of cases for a name in the search results must display a summary of the selected case.
- SO-1.1.6 If no cases are returned, there must be a message to the user notifying them that the child has no cases from which to prefill the "Add New" case.
- SO-1.1.7 There must be a mechanism to remove the list of cases for a name in the search results so that a different name can be selected.
- SO-1.1.8 There must be a mechanism to remove the search results so that different search criteria can be entered.
- SO-1.1.9 There must be a mechanism to disregard the search results and go directly to Case Registration in order to add a new case.
- SO-1.1.10 If the Case Number is entered then it precludes all other search criteria.
- SO-1.1.11 If the Social Security number is entered then it precludes all other search criteria.

- SO-1.1.12 If the Client ID is entered then it precludes all other search criteria.
- SO-1.1.13 The legal status must always be entered because it determines the scope of the search as follows:
 - SO-1.1.13.1 When adding a Foster Care case (legal status 41, 42, 44, 45, 48, or 51) Soundex must not allow the user to add if there is any non-closed case matching the search criteria for the child.
 - SO-1.1.13.2 When adding a Juvenile Justice case (legal status 40, 46, 47, 50, 52, 90, 91, 92, 93, 94, 95, or 96) Soundex must not allow the user to add if there is any non-closed case matching the search criteria for the child.
 - SO-1.1.13.3 When adding an Adoption case (legal status 43 or 49) Soundex must not allow the user to add if there is an active Adoption or Foster Care case matching the search criteria for the child.
- SO-1.1.14 The search criteria of last name, first name, sex and date of birth are cumulative and refine the search; i.e., search results will match all of the entered criteria. Entering fewer criteria will return more results.
- SO-1.2 There must be a case summary screen of a selected case from the list of cases for a name from the search results.
 - SO-1.2.1 The case summary of a selected case must display the following items:
 - SO-1.2.1.1 Case Log#
 - SO-1.2.1.2 Case State
 - SO-1.2.1.3 Last Name
 - SO-1.2.1.4 First Name
 - SO-1.2.1.5 Middle Name
 - SO-1.2.1.6 Case Number
 - SO-1.2.1.7 Client Id
 - SO-1.2.1.8 Assigned Worker
 - SO-1.2.1.9 Open Date
 - SO-1.2.1.10 Close Date
 - SO-1.2.1.11 Legal Status
 - SO-1.2.1.12 DOB
 - SO-1.2.1.13 Age
 - SO-1.2.1.14 Sex

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- SO-1.2.1.15 Disability
 - SO-1.2.1.16 Race
 - SO-1.2.1.17
 - SO-1.2.1.18 Living Arrangement
 - SO-1.2.1.19 SSN
 - SO-1.2.1.20 Placement Name
 - SO-1.2.1.21 Placement Address
 - SO-1.2.1.22 Placement Date
 - SO-1.2.2 The following Member Information for the selected case must be displayed:
 - SO-1.2.2.1 Case Member Name
 - SO-1.2.2.2 DOB
 - SO-1.2.2.3 Member's Relationship to child
 - SO-1.2.3 Companion Case Information must be displayed; i.e., a list of other companions associated with the case selected
 - SO-1.2.3.1 Companion Name
 - SO-1.2.3.2 DOB
 - SO-1.2.3.3 SSN
 - SO-1.2.3.4 Client ID
 - SO-1.2.3.5 Log Id #
 - SO-1.2.4 The worker must be given the option to accept or cancel the child's case displayed.
 - SO-1.2.4.1 If the child's case is accepted, the data will be used to prefill the new case.
 - SO-1.2.4.2 If the child's case is canceled, the list of cases matching the search criteria will be displayed.
 - SO-1.2.4.3 The worker must be able to continue with add new without using any of the cases found.
 - SO-1.2.5 There must be a mechanism to abort the add new process and return the user to the Main Menu module.

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- SO-1.3 There must be a screen to find a client; i.e., a “Find a Client” search screen, which is used to find a case and prefill that case’s log number on the Main Menu module.
- SO-1.3.1 The find a client search screen must accept the following search parameters:
- SO-1.3.1.1 Last name
 - SO-1.3.1.2 First name
 - SO-1.3.1.3 sex
 - SO-1.3.1.4 Date of birth
 - SO-1.3.1.5 County
 - SO-1.3.1.6 Current, Previous, and AKA name designator
 - SO-1.3.1.7 Case number
 - SO-1.3.1.8 Client id
 - SO-1.3.1.9 Social security number
- SO-1.3.2 The search result should return the following case information:
- SO-1.3.2.1 County code
 - SO-1.3.2.2 Last name
 - SO-1.3.2.3 First name
 - SO-1.3.2.4 Middle name
 - SO-1.3.2.5 AKA/FKA indicator
 - SO-1.3.2.6 Social security number
 - SO-1.3.2.7 Client ID
 - SO-1.3.2.8 Date of birth
 - SO-1.3.2.9 Sex
 - SO-1.3.2.10 Race
- SO-1.3.3 Selecting one of the records from the search must display the list of cases with which this client was associated (either a child or member), and must display the following information:
- SO-1.3.3.1 Log number
 - SO-1.3.3.2 Open date

- SO-1.3.3.3 Case number
- SO-1.3.3.4 Assigned worker's load number
- SO-1.3.3.5 Program (Foster Care, Juvenile Justice, Or Adoption)
- SO-1.3.3.6 Case state (unregistered, register, open, closed, withdrawn)
- SO-1.3.4 Selecting one of the cases from the list of cases for a name in the search results must display a summary of the selected case.
- SO-1.3.5 If no cases are found, a message must display to the user notifying them that this person is not associated with any cases.
- SO-1.3.6 There must be a mechanism to remove the list of cases for a name in the search results so that a different name can be selected.
- SO-1.3.7 There must be a mechanism to remove the search results so that different search criteria can be entered.
- SO-1.3.8 If the Case Number is entered then it precludes all other search criteria.
- SO-1.3.9 If the Social Security number is entered then it precludes all other search criteria.
- SO-1.3.10 If the Client ID is entered then it precludes all other search criteria.
- SO-1.3.11 There must be a mechanism to select the case displayed on the summary screen and enter that log id on the main menu screen.
- SO-1.3.12 There must be a mechanism to return to the list of cases in order to select a different case to display.
- SO-1.4 There must be a member name search screen when adding a member to an existing case; i.e., an "Add a Member" screen, which is used to creating a new instance of a person already known to the system and allow the user to add the person to the current case.
 - SO-1.4.1 The add a member search screen must accept the following search parameters:
 - SO-1.4.1.1 Last name
 - SO-1.4.1.2 First name
 - SO-1.4.1.3 sex
 - SO-1.4.1.4 Date of birth
 - SO-1.4.1.5 Current, Previous, and AKA name designator
 - SO-1.4.1.6 Case number
 - SO-1.4.1.7 Client id

- SO-1.4.1.8 Social security number
- SO-1.4.2 The add a member search screen must display the case name for the current case.
- SO-1.4.3 The search result should return the following case information:
 - SO-1.4.3.1 County code
 - SO-1.4.3.2 Last name
 - SO-1.4.3.3 First name
 - SO-1.4.3.4 Middle name
 - SO-1.4.3.5 AKA/FKA indicator
 - SO-1.4.3.6 Social security number
 - SO-1.4.3.7 Client ID
 - SO-1.4.3.8 Date of birth
 - SO-1.4.3.9 Sex
 - SO-1.4.3.10 Race
- SO-1.4.4 Selecting one of the records from the search must display the list of cases with which this client was associated (either a child or member), and must display the following information:
 - SO-1.4.4.1 Log number
 - SO-1.4.4.2 Open date
 - SO-1.4.4.3 Case number
 - SO-1.4.4.4 Assigned worker's load number
 - SO-1.4.4.5 Program (Foster Care, Juvenile Justice, Or Adoption)
 - SO-1.4.4.6 Case state (unregistered, register, open, closed, withdrawn)
- SO-1.4.5 Selecting one of the cases from the list of cases for a name in the search results must display a summary of the selected person.
- SO-1.4.6 If no cases are found, a message must display notifying the user that this person is not associated with any cases.
- SO-1.4.7 There must be a mechanism to remove the list of cases for a name in the search results so that a different name can be selected.
- SO-1.4.8 There must be a mechanism to remove the search results so that different search criteria can be entered.

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- SO-1.4.9 There must be a mechanism to disregard the search results and go directly to Case Member in order to add a new member.
 - SO-1.4.10 If the Case Number is entered then it precludes all other search criteria.
 - SO-1.4.11 If the Social Security number is entered then it precludes all other search criteria.
 - SO-1.4.12 If the Client ID is entered then it precludes all other search criteria.
 - SO-1.4.13 There must be a mechanism to return to the list of cases in order to select a different case to display.
 - SO-1.4.14 There must be a mechanism to display a list of AKA names for the person selected.
 - SO-1.4.15 There must be a mechanism to display a list of Previous names for the person selected.
 - SO-1.5 There must be a person summary screen to display information about a potential case member.
 - SO-1.5.1 The person summary screen must display the following data elements about a person selected from the results of an add a member search.
 - SO-1.5.1.1 Last name
 - SO-1.5.1.2 First name
 - SO-1.5.1.3 Middle name – The grid displayed after the search for the Find a Client Name must include the child’s middle name if present in the data base.
 - SO-1.5.1.4 Client ID
 - SO-1.5.1.5 Date of birth
 - SO-1.5.1.6 Sex
 - SO-1.5.1.7 Social security number
 - SO-1.5.1.8 Race
 - SO-1.5.1.9 Hispanic or Latino Ethnicity
 - SO-1.5.1.10 Migrant indicator
 - SO-1.5.1.11 Current address, city, state, and zip code
 - SO-1.5.1.12 Current phone number
 - SO-1.5.2 The person summary screen must inform the user if the person selected for display has their own case.

SO-1.5.3 There must be a mechanism to select the displayed person, which will then prefill the add a member screen in the member module.

SO-1.5.4 There must be a mechanism to return to the list of cases so that a different name may be selected from the results of an add-a-member name search.

SO-2 DATA EDITING REQUIREMENTS:

SO-2.1 Client ID must be 10 numeric digits, begin with "00", and must conform to the department's checksum algorithm to validate its format.

SO-2.2 Case number must be nine characters long; the first and last characters are alphabetic; the middle seven characters are numerals. The suffix character may not be "P".

SO-2.3 The social security number must conform to social security administration guidelines for its proper format (see attachments at the end of this document).

SO-2.4 Sex must be either "F" or "M".

SO-2.5 Date of birth must be a proper date in the format of MMDDCCYY, and must be on or before today's date.

SO-3 OUT-OF-MODULE REQUIREMENTS:

SO-3.1 CASE REGISTRATION REQUIREMENT: Case Reg must accept the case identified by an add new search so that a prefill can be done for the new case.

SO-3.2 CASE REGISTRATION REQUIREMENT: Case Reg must accept the information entered as search criteria during an add new search to prefill its own screen if the results of the add new search are rejected.

SO-3.3 MEMBER INFORMATION REQUIREMENT: Member Info must accept the person identified by an add a member search so that a prefill can be done for the new member.

SO-3.4 MEMBER INFORMATION REQUIREMENT: In the case where the person is not found in Soundex, Member Info must accept the search data as prefill data for the person to be added.

SO-4 MODULE REQUIREMENTS:

SO-4.1 SWSS would not search the PS database, as a child can be Active in a PS Case and either a Foster Care, Adoption or Juvenile Justice Case. Information will not Prefill from a PS Case either.

SO-4.2 Only Cases where the identified child was under 18 should display.

SO-4.3 Only the most recent case found for the Child would be used for prefill for the worker.

- SO-4.4 The List from the statewide search should display cases with and without a DOB as date of birth is not a required field for the search.
- SO-4.5 If the Worker found that there was already an Open Case in the same Program Group an ADDNEW would not be allowed. The Worker would need to be told that there is an existing Case Open and that a new case within the same program group can not be created.
- SO-4.6 If there is an Open Case in a different Program Group, a message should tell the Worker that there is an existing Case Open, and the Worker may not create the new case as long as the already existing Case remains Open.
- SO-4.7 When adding a new case, allow the user to select from an existing case for the client to add a new instance of the client in a case (thus creating the continuum of care). This is valid under the following conditions:
- SO-4.7.1 Any closed case can be chosen to prefill any new FC, ADPT, or JJ case.
- SO-4.8 The worker must be shown a summary of a case from the list of cases found when doing an ADDNEW name search.
- SO-4.9 A worker should not be able to add a JuvJust case with a legal status of 50 if there is an open FC case for that child.
- SO-4.10 The SOUNDEX Add a Member search criteria entered must be used to prefill the Member Info data in the case that the member is not found in the Soundex search.
- SO-4.11 If the user performs an action upon the database after the database has timed the user out, SWSS must automatically reconnect to the database and continue working.
- SO-4.12 Central Office users (county 84) need inquiry access for case information.

SO-5 OUTPUT REQUIREMENTS:

SO-6 MISCELLANEOUS REQUIREMENTS:

5 EXAMPLE OUTPUT

Gather and include the forms and letters generated by this module. If possible, mark up the examples to explain the data fields to show the source or whether or not it is required.

6 DATA ELEMENT DESCRIPTIONS

A table of all the data elements entered within this module. For each item, describe its range of acceptable values. Designate items as being required for ASSIST, CIS, LICENSING or AFCARS (and any combination thereof).

ELEMENT NAME	DESCRIPTION	TYPE - Alpha, numeric, A/N	SIZE	REQUIRED/ OPTIONAL/ CONDITIONAL	CIS/ASSIST AFCARS/ Out Put Document
Last name	For search	alpha	19	Minimum requirement for name search	no
First name	For search	alpha	12	optional w/name search	no
sex	For search	alpha	1	optional w/name search	no
Date of birth	For search	numeric	8	optional w/name search	no
Legal status	For search	numeric	2	Required for Add new Not available w/search	no
Case number	For search	A/N	9	optional	no
Client id	For search	numeric	10	optional	no
Social security number	For search	numeric	9	optional	no
Find string	For search through list of returned names, dob, etc.	A/N	20	optional	no

7 HELP MESSAGES

There are to be three levels of help available: Screen, which describes how the process for the current module is supposed to work, Context-Sensitive, which describes a particular data field on the screen, and Status Panel, which offer hints about the field or command button with the current focus.

7.1 SCREEN (Section or Module level. Offers an entry point to the big help file.)

7.2 CONTEXT-SENSITIVE (“F1”, aka “detail”)

STATUS PANEL MESSAGES (formerly known as “Field Level” and “Baby” before that.)

Module: Find a Client

Field	New Message
Last Name	Enter last name
First Name	Enter first name
Male	Select if male
Female	Select if female
DOB	Enter date of birth (MM/DD/YYYY)
County	Select county code
Current	Select to search for current name
Previous	Select to search for previous names held by client
AKA	Select to search for aliases held by client
Case Number	Enter CIS case number (X9999999X)
Client ID	Enter client identification number (9999999999)
SSN	Enter social security number (999-99-9999)
Main Menu	Select to go to main menu
Search	Select to search for client
(box)	Enter characters to narrow search
Find	Select to search
Find Next	Select to find next match
County (tab)	Display county wide results
State Wide	Display state wide results
(list)	(no message)
Ascending	Select appropriate sort order
Descending	Select appropriate sort order
New Search	Select to begin new search
List of Cases	Select to view cases
(general message after case selected)	(no message)
List of Names	Select to view names
Case Summary	Select to view case summary

Module: Case Summary - Find a Client

Field	New Message
Legal Status	Scroll to view additional information

Disability	Select to view list of disabilities
Living Arrangement	Scroll to view additional information
Members	(no message)
Companions	(no message)
Comments	Select to view comments
Soundex	Select to return to search results
Select	Select to go to main menu with case information

Module: Add New

Field	New Message
Last Name	Enter last name
First Name	Enter first name
Male	Select if male
Female	Select if female
DOB	Enter date of birth (MM/DD/YYYY)
Legal Status	Select legal status
Case Number	Enter CIS case number (X9999999X)
Client ID	Enter client identification number (9999999999)
SSN	Enter social security number (999-99-9999)
Cancel	Select to return to previous screen
Search	Select to search for client
Continue Add New	Select to continue adding new case

Module: Case Summary - Add New

Field	New Message
Legal Status	Scroll to view additional information
Disability	Select to view list of identified disabilities
Living Arrangement	Scroll to view additional information
Members List	No message
Companions List	No message
Comments	Select to view comments
Soundex	Select to return to search results
Select	Select to return
Case Reg.	Select to begin case registration

Module: Add a Member Name Search

Field	New Message
Last Name	Enter last name
First Name	Enter first name
Male	Select if male
Female	Select if female
Current	Select to search for current name
Previous	Select to search for previous names held by client
AKA	Select to search for aliases held by client
DOB	Enter date of birth (MM/DD/YYYY)
Case Number	Enter CIS case number (X9999999X)
Client ID	Enter client identification number (9999999999)
SSN	Enter social security number (999-99-9999)

(box)	Enter characters to narrow search
Find	Select to search
Find Next	Select to find next match
Cancel	Select to return to previous screen
Search	Select to search for client
County (tab)	Display county wide results
State Wide	Display state wide results
(list)	(no message)
Ascending	Select appropriate sort order
Descending	Select appropriate sort order
New Search	Select to begin new search
List of Cases	Select to view cases
(general message after case selected)	(no message)
List of Names	Select to view names
Person Summary	Select to view person summary

Module: Person Summary

Field	New Message
Race	Scroll to view additional race information
Soundex	Select to return to search results
Select	Select to go to add person to member information

8 MODULE DEPENDENCIES

What data must be entered in other modules before this module can be used?

What changes in data within other modules effect this module?

No other modules are directly dependent on the Soundex Module. The Soundex Module is dependent on information from a database, such as the CIS system.

9 SCENARIOS

The requirements scenarios that call for data entered by this module. This is just a cross reference into the

10 TEST PLANS

The updated test plans written by the Program Office and/or the developer to verify the correctness of the finished application.

11 SOURCE MATERIAL

The following items are included for historical purposes only. The current requirements were derived from this source material, and are, in places, out of date, incorrect, or conflicting.

11.1 Original Requirement

11.2 Memos and E-Mail

11.2.1 Addendum 1

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: November 12, 1999

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Soundex Module Documentation - Addendum 1

Based on discussions and review of other modules, it was determined that the November 2, 1999 memo regarding this module requires revision:

1. SO-1.1.14: Delete 'middle initial'. This is not a search field.
2. SO-1.2.1.15: Change 'Handicap' to **Disability** as data comes from child information not education. This is true for all summary screens.
3. Add Social Security Number between SO-1.2.1.18 and SO-1.2.1.19.
4. SO-1.4.1.5: Delete. County is only used in the Find a Client search.
5. Add Hispanic or Latino between SO-1.5.1.8 and SO-1.5.1.9
6. SO-4.2: Change 'Recipient' to **Identified Child**.
7. SO-4.3: Delete 'display' and insert **be used for prefill** in its place.
8. SO-4.4: Add at end **as date of birth is not a required field for the search**.

Please let me know if you need additional information.

SWSS Project
User Requirements
Soundex Module

September 18, 1999

cc: Carol Kraklan
Sue Doby
Phil Rock
Nancy Presocki

11.2.2 November 2, 1999

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: November 2, 1999

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Soundex Module Documentation

We have carefully reviewed the User Requirements document dated October 21, 1999 (printed October 21, 1999) on the Soundex Module and have the following clarifications:

1. Page 1, Purpose, 1st paragraph, 1st sentence: Change to read "***The Soundex process as an*** automated search.....with prior SWSS history. ***It*** will help....."
2. Page 1, Purpose, 1st paragraph, last line: Change to read "...that are inadvertently ~~included~~ ***added.***"
3. Page 1, Purpose, 1st paragraph, last line: Delete the last sentence 'By reusing existing information....'
4. Page 3, Screen Interaction: Change first sentence to read '.... limited amount of ~~case member~~ detail ***when adding a new case or a new member to an established case.***'
5. Page 7, SO-1.2.1.16: Add ***Primary*** before race.
6. Page 9, SO-1.4: Change wording to '....which is used to ~~creating~~ ***create***.....'
7. Page 12, SO-2.2: Add at end '.....may not be "P" ***for foster care, adoption and juvenile justice cases.***'
8. The resolution of the issues surrounding dual legal status cases will require the following change to Soundex.
 - a) Do not allow an AddNew children's services case if an active (i.e., not closed) children's services case exists unless the active case is a CPS case.

Please let me know if you need additional information.

cc: Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

11.2.3 Field Level Helps

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: November 1, 1999

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Field Level Helps in Module Documentation

We have reviewed the field level helps for the following modules and have clarifications to add for several:

- Case Summary: No changes or clarifications
- Comments: No changes or clarifications
- Companionation: No changes or clarifications
- Find A Client: No changes or clarifications
- Main Menu: No changes or clarifications
- PS Transfer: No changes or clarifications
- Utilities: No changes or clarifications
- Add New: Add at the end of the Continue Add New Message 'with no prefill'
- Medicaid :
 - The field should be "Print FIA-133a to register.
 - The field should be 'Current managed care program', not manager.

Please let me know if you need additional information.

cc: Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

11.2.4 Addendum 2

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: April 13, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Soundex Module Documentation - Addendum 2

It is necessary to amend the Soundex Module Documentation memos of November 2 and 12, 1999. After discussions with program, project and development staff, it was noted that the following clarifications are needed:

1. SO-1.1.1.5 needs to include the statement that **“Dual Legal Statuses of 52 and 90-94 are not to be included as a selection for the ‘Add New’ process.”**
2. SO-1.5.1.3 needs to include the requirement that **“The grid displayed after the search for the Find A Client Name must include the child’s middle name if present in the data base.”**

Please let me know if you need additional information.

cc: Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

11.2.5 Status Bar Help Messages

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: May 15, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Soundex Module Status Bar/Field Level Help Messages

During focussed testing of the application, it was noted that two of the soundex status bar help messages for the radio buttons of male and female did not conform with the Section 7 documentation. The message that is in the application is much clearer than the documentation. Thus, we are requesting that the documentation be updated to say “**select if male**” and “**select if female**” instead of “select m for male and f for female”.

Please let me know if you need additional information.

cc: Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

11.2.6 Addendum 3

STATE OF MICHIGAN
FAMILY INDEPENDENCE AGENCY

MEMORANDUM

To: Sue London, Director
SWSS Project

Date: July 20, 2000

From: Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

Subject: Soundex Module Documentation - Addendum 3

It is necessary to amend the Soundex Module Documentation memos of November 2 and 12, 1999 and April 13, 2000. After focussed testing (SER #603) and discussions with program, project and development staff, it was noted that the following clarifications are needed:

3. SO-1.2.1.17 must be deleted.

Please let me know if you need additional information.

cc: Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

11.3 Test Plans

11.3.1 Test Plan Created by Policy

11.3.2 Test Plan Created by SWSS Development

12 OUTSTANDING ISSUES

12.1 The following items require a decision or some direction from Policy staff:

1

13 ATTACHMENTS

13.1 List of SWSS Module Prefixes

MODULE PREFIXES TO BE USED FOR REQUIREMENTS

MODULE	TABLE
CASE LISTING	CL
MAIN MENU	MM
CASE REGISTRATION	CR
CHILD INFO	CI
MEMBER INFO	MI
LEGAL	LE
FUNDING DETERMINATION	FD
PLACEMENT	PL
PAYMENT	PA
EDUCATION	ED
MEDICAID	MA
MEDICAL PASSPORT	MP
FIVE DAY PACKET	FD
COMMENTS	CO
CASE SUMMARY	CS
CASE CLOSING	CC
MARE	MR
ADOPTION ACTIVITY	AA
REPORT GENERATION	RG
TICKLERS	TI
PROVIDERS	PR
UTILITIES	UT
LOGIN/SECURITY	LO
PRINT133A	P1
PRINT5S	5S
ACTION SUMMARY	AS
PURCHASE OF SERVICE	PU
PS XFER	PX
CONVERSION	CV
SOUNDEX	SO
SYSTEM FLOW	SF
RECONCILIATION	JTL