CHAP–SFL ENROLLMENT SYSTEM

USER TRAINING MANUAL

Version 1.3
05/24/2012
# VERSION HISTORY

<table>
<thead>
<tr>
<th>Version #</th>
<th>Implemented By</th>
<th>Revision Date</th>
<th>Approved By</th>
<th>Approval Date</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Tom Brown</td>
<td>03/01/2012</td>
<td></td>
<td></td>
<td>Initial draft</td>
</tr>
<tr>
<td>1.1</td>
<td>Tom Brown</td>
<td>03/13/2012</td>
<td></td>
<td></td>
<td>Second draft</td>
</tr>
<tr>
<td>1.2</td>
<td>Tom Brown</td>
<td>04/27/2012</td>
<td></td>
<td></td>
<td>Third draft</td>
</tr>
<tr>
<td>1.3</td>
<td>Tom Brown</td>
<td>05/08/2012</td>
<td></td>
<td></td>
<td>Final</td>
</tr>
</tbody>
</table>
## TABLE OF CONTENTS

**TABLE OF CONTENTS** .................................................................................................................................................. 3

**FIGURES** ................................................................................................................................................................. 5

**OVERVIEW** ............................................................................................................................................................... 7

**LOGIN** ........................................................................................................................................................................ 9

**THE MAIN MENU** ..................................................................................................................................................... 12

**USER FUNCTIONALITY (“MAIN”)** .......................................................................................................................... 13

  - View Clients ............................................................................................................................................................ 13
  - Enroll New ............................................................................................................................................................ 15
  - Reenroll Existing .................................................................................................................................................. 16
  - DisEnroll Client ................................................................................................................................................... 17
  - Enrolling or Re-Enrolling a Client ...................................................................................................................... 20
    - Overview ......................................................................................................................................................... 20
    - Client Addresses ............................................................................................................................................. 20
    - Race ................................................................................................................................................................. 20
    - Add Household Member ................................................................................................................................. 21
    - MCI Numbers .................................................................................................................................................. 21
    - Deductible ...................................................................................................................................................... 26
    - Admitted to Hospital / Hospital Emergency Room ...................................................................................... 27
    - Hospitalization Reason ................................................................................................................................... 27
    - Health Problems ............................................................................................................................................. 28
    - Add New Family Health Record ..................................................................................................................... 28
    - Medicaid Application Status ........................................................................................................................ 30
    - Children Included in Medicaid Application ................................................................................................ 30
    - Income Level .................................................................................................................................................. 32
    - CHAP Enrollment Status ................................................................................................................................ 32
    - Referrals .......................................................................................................................................................... 32
    - SFL Enrollment Status ..................................................................................................................................... 34
    - SFL Eligibility ................................................................................................................................................... 35
    - Saving an Enrollment or Re-enrollment ......................................................................................................... 35
    - Exit Without Saving the Enrollment ............................................................................................................. 36
  - Case Notes ............................................................................................................................................................. 37
    - Case Notes vs. Comments ................................................................................................................................ 38
    - Writing a Note ................................................................................................................................................... 38
    - Reminders ......................................................................................................................................................... 38
    - Differences from SFL ....................................................................................................................................... 39
    - Printing Case Notes ......................................................................................................................................... 39
  - Printing Reenrollment and Welcome Letters ....................................................................................................... 40

**ADMINISTRATOR FUNCTIONALITY (“ADMINISTRATION”)** ..................................................................................... 41

  - Overview ............................................................................................................................................................ 41
  - Blood Pressure Responses (Supports Enrollment Question #25) ........................................................................ 41
  - Change Screening Client ID ................................................................................................................................ 42
  - Client De-duplication .......................................................................................................................................... 43
  - CHAP Record Status .......................................................................................................................................... 45
Child Enroll Codes........................................................................................................46
Client History..................................................................................................................47
Denied Medicaid............................................................................................................48
Diabetes Response .........................................................................................................49
Health Home ..................................................................................................................50
Health Provider Types....................................................................................................51
Ineligible Reasons..........................................................................................................52
Last Visits .......................................................................................................................53
Limited Medicaid ..........................................................................................................54
Medicaid Appl Status.....................................................................................................55
Medicaid Status .............................................................................................................56
No Doctor Reason..........................................................................................................57
Referral Sources ............................................................................................................58
SFL Enrollment Status ...................................................................................................59
Three Pap Rules ............................................................................................................60
VIP Doctors ...................................................................................................................61
FIGURES

Figure 1: Example of a list showing the "Deleted" flag ................................................................. 7
Figure 2: Example of a grid-based list with sorting and paging controls (Note that the list in the illustration has a second page, which begins with ID # 11 at the top) ........................................................................... 8
Figure 3: Login Dialog .................................................................................................................. 9
Figure 4: Change Password Dialog ........................................................................................... 10
Figure 5: Top of page showing the “Change Password” (#1) and the "Sign Out" (#2) controls. .......... 11
Figure 6: The Main Menu ............................................................................................................ 12
Figure 7: Viewing Clients: The Search Screen ............................................................................. 13
Figure 8: Client Search: The List Tab (Part 1 of 2) ....................................................................... 14
Figure 9: Client Search: The List Tab (Part 2 of 2) ....................................................................... 15
Figure 10: Client Search When Reenrolling One or More Clients ............................................. 16
Figure 11: Client Search When Disenrolling One or More Clients ........................................... 17
Figure 12: View / Edit / Enroll / Re-Enroll Client (Client tab) .................................................... 19
Figure 13: Popup Dialog to add/edit a member of the client’s household ................................... 21
Figure 14: The Results of an MCI Search ..................................................................................... 22
Figure 15: Top Portion of the Enrollment Screen Showing the MCI Field and Lookup Button ........ 23
Figure 16: View / Edit / Enroll / Re-Enroll Client (Eligibility tab) ............................................. 25
Figure 18: Hospitalization Dialog ............................................................................................... 27
Figure 19: View / Edit / Enroll / Re-Enroll Client (Health tab) ...................................................... 28
Figure 20: Popup dialog - Who in the family had cancer ............................................................. 29
Figure 22: Popup Child Medicaid Dialog .................................................................................... 31
Figure 23: View / Edit / Enroll / Re-Enroll Client (CHAP Information tab) ............................... 31
Figure 24: Enrollment Referral Dialog ....................................................................................... 33
Figure 25: View / Edit / Enroll / Re-Enroll Client (SFL Information tab) ....................................... 34
Figure 26: Case Management: List All Tab .................................................................................. 37
Figure 27: Case Management: Details Tab .................................................................................. 38
Figure 28: Sample Case Notes Report for a single client ............................................................. 39
Figure 29: Date Range Prompt for Printing Reenrollment Letters .............................................. 40
Figure 30: Date Range Prompt for Printing Welcome Letters (Batch Print) ............................... 40
Figure 31: Admin - Told Have High Blood Pressure ................................................................. 41
Figure 32: Admin - Told Have High Blood Pressure ................................................................. 41
Figure 33: Changing the Client ID connected to a Screening Form .......................................... 42
Figure 34: Client De-Duplication ................................................................................................. 43
Figure 35: Admin - CHAP Record Status .................................................................................... 45
Figure 36: Admin - CHAP Record Status .................................................................................... 45
Figure 37: Admin - Child Enrollment Codes ............................................................................... 46
Figure 38: Admin - Child Enrollment Codes ............................................................................... 46
Figure 39: View all Enrollment Records for One Client .............................................................. 47
Figure 39: Admin - Denied Medicaid ......................................................................................... 48
Figure 40: Admin - Denied Medicaid ......................................................................................... 48
Figure 41: Admin - Told Have Diabetes ..................................................................................... 49
Figure 42: Admin - Told Have Diabetes ..................................................................................... 49
Figure 43: Admin - Health Home ............................................................................................... 50
Figure 44: Admin - Health Home ............................................................................................... 50
Figure 45: Admin - Health Provider Types ................................................................................. 51
Figure 46: Admin - Health Provider Types ................................................................................. 51
OVERVIEW

This document describes the new integrated Community Healthcare Access Program (hereafter called “CHAP”) and Screening for Life (hereafter called “SFL”) enrollment application process, which is provided as a Web application.

1. Deleted Records Note: Unlike some data entry systems, records are not allowed to be deleted (i.e., permanently removed from the system). This is to prevent the impact of that removal on related data. For example, a particular Client is being referenced by a Case Note, an Enrollment record, and (in the separate Screening for Life system) a screening and diagnostic form. If this client record were to be permanently removed/erased/deleted, we would no longer know who was being referenced by that Case Note, Enrollment, etc. This is clearly unacceptable. Therefore, the concept of a “soft delete” has been introduced: an internal field indicating whether or not a row of data has been “deleted” (i.e., hidden from the casual user). Rows that are marked in this way still exist (therefore, the information isn’t truly lost), but the computer program has been designed to treat them as if they really were removed. Because this “soft delete” is a simple flag, the row can be undeleted (i.e., made visible again) at a later date, if necessary.

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Dr. Jim Jones</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>3</td>
<td>Dr. William Burke</td>
<td>DELETED</td>
<td>Edit</td>
</tr>
<tr>
<td>4</td>
<td>Dr. Ingrid Klein</td>
<td></td>
<td>Edit</td>
</tr>
</tbody>
</table>

Figure 1: Example of a list showing the "Deleted" flag

Some lists contain a column that is, by default, empty. This column is reserved for the word “DELETED” (see Figure 2 above), indicating that the row is marked with the “soft delete” flag. Most users (that is, those without access to Administrative functions) will never see a list marked “deleted”. To those users, such entries will really appear to be removed from the system. Lists with this feature are only found on the Administration’s menu, as they supply the means by which a deletion or undeletion is accomplished. To understand who can use the options listed under “Administration” on the main menu, see the discussion on “Roles and Permissions” in the Login section below.

2. Sorting Lists By Any Column: Throughout the program, instances of lists of data laid out in a grid format (see Figure 2 below) will be found. These lists can be sorted on a column by clicking on that column’s header text. By default, each list is limited to showing 10 rows at a time. If there are more than 10 rows, a link to the additional pages will appear at the bottom. Sorting affects the entire list, and not just the currently-visible page. In the example below, the first entry at the top of page 2 will be ID # 11 (the list is currently sorted on the first column)
<table>
<thead>
<tr>
<th>ID #</th>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Interview in progress</td>
<td>Edit</td>
</tr>
<tr>
<td>2</td>
<td>Application ready for review</td>
<td>Edit</td>
</tr>
<tr>
<td>3</td>
<td>Central Office review</td>
<td>Edit</td>
</tr>
<tr>
<td>4</td>
<td>Pending Medicaid review</td>
<td>Edit</td>
</tr>
<tr>
<td>5</td>
<td>Pending CHAP - no medical home</td>
<td>Edit</td>
</tr>
<tr>
<td>6</td>
<td>Pending CHAP - Medicaid Appl. required</td>
<td>Edit</td>
</tr>
<tr>
<td>7</td>
<td>Pending CHAP - Income verification</td>
<td>Edit</td>
</tr>
<tr>
<td>8</td>
<td>Enrolled CHAP</td>
<td>Edit</td>
</tr>
<tr>
<td>9</td>
<td>Patient Non-response</td>
<td>Edit</td>
</tr>
<tr>
<td>10</td>
<td>Referred to VA</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Figure 2: Example of a grid-based list with sorting and paging controls (Note that the list in the illustration has a second page, which begins with ID # 11 at the top)
LOGIN

Figure 3: Login Dialog

The integrated CHAP-SFL enrollment system maintains its own security. That means a login process separate from whatever must be done to gain access to the Web application in the first place. It also means that CHAP/SFL maintains its own role-centric permissions in relation to the user’s login credentials.

User ID:

To start using the system, the user must first identify himself by typing their full name into the “Username” box. Note that upper and lower case matters. “Adam”, “ADAM”, and “adam” are all different names to the system. At login, the user will also identify their location/site/facility by using the drop-down list (marked “Site Number”) on the login screen. The Password, like the Username, must be an exact match with what has been stored in the system. Again, upper and lower case matters.

Roles and Permissions:

The integrated CHAP/SFL Enrollment system restricts what a particular user can do by means of roles. These Roles are defined in the database as “Account Types” in the “SecAccounts_T1” table. The system will hide any option the user does not have specific permission to use. The current Roles are listed below:

Admin
Case Mgr
CC Dir
DE Tech
DE Temp
Director
Enr Spec
MA II
NC
Secretary
CHAP

Permissions are menu-centric. That is, permission is given (or not given) to see / use / interact with specific items in the application’s menu. Thus, if a particular Role lacks the permission to access, for example, the “Enroll New” menu item, then that menu option will not be shown to any user assigned to that Role.
In general, access to the “Administration” menu items is restricted to the “Admin” role, although it is possible to assign a subset of those to other (possibly supervisory) Roles.

**Change password:**

The first time you login to the Web Application, you will be asked to change your password, using the prompt shown in Figure 4: Change Password Dialog. Passwords must be selected according to certain rules:

- Minimum length: passwords must be at least 8 characters long
- Must include certain characters: passwords must include the following character types:
  - Lower-case letters (a thru z)
  - Upper-case letters (A thru Z)
  - Numbers (0 thru 9)
  - Special Characters: !@#$%^&*()_-+=[{]}]:;>,.?~`
- Special characters cannot be the first or the last one in the password.
- Cannot contain three or more consecutive letters (e.g.: abc) or digits (e.g.: 123).
- Cannot contain three or more of the same letter (e.g.: bbb) or number (444) in a row.
- Passwords expire after 90 days. After that time, they must be changed.
- The last 8 previously used passwords cannot be repeated.

This password is separate from, and is unaffected by changes to, any other password. For example, email and/or network access passwords aren’t used by the integrated CHAP-SFL Enrollment Web Application.

![Change Password Dialog](Figure 4: Change Password Dialog)
To manually change the password after a successful login, click on the “Change Password” link at the top of the screen (see #1 in Figure 5, circled in red). This will display the same Change Password screen described above.

**Logout:**

To logout (i.e., leave the program entirely), go to the upper right portion of the web page (see #2 in Figure 5: Top of page showing the “Change Password”(#1) and the "Sign Out"(#2) controls. circled in red), and click on the words “Sign Out”, located directly underneath your login name.
The Main Menu

The available options on the menu strip (fixed to the left side of the web page, see Figure 6: The Main Menu) will hide any option not allowed by the current user’s role. For example, if a user lacks Administrator rights for the CHAP/SFL system, they may see the options listed under “Main”, but not the ones under the “Administration” link (or, indeed, the “Administration” link at all).

Each option listed on the menu strip represents an individual web page. To access that web page, the user merely has to click on the text (which in the Internet universe is called a “Hypertext Link”, or merely a “Link”).

**Note:** the “Welcome Letters” shown on the menu is the equivalent of the current “Batch Print” function in the legacy Enrollment portion of Screening for Life, extended to cover both SFL and CHAP. This menu option will print both the Welcome and Denial letters, depending upon each Client’s eligibility status.
USER FUNCTIONALITY ("MAIN")

VIEW CLIENTS
In order to view a particular client’s enrollment record, the Client Search screen must be used (see Figure 7: Viewing Clients: The Search Screen by clicking on “view clients” from MAIN menu. This screen consists of two tabs: Search Criteria and the Client List. The Search Criteria tab is where the client (or set of multiple clients) is identified. Each client has a unique ID number\(^1\), which can be searched for directly, if known. The Client ID is a 5- or 6-digit number that gets assigned to anyone who applies for enrollment, even if that enrollment is not granted due to ineligibility. Also note that it is possible for an individual to qualify for CHAP only, SFL only, both CHAP and SFL, or neither.

\(^1\) In the legacy CHAP system, this is the equivalent of the “Membership ID” (which is not supported in the CHAP-SFL Enrollment system).
Not all “Search Criteria” fields need to be filled-in, only the minimum necessary to find a particular individual! For example: Last Name and Zip Code.

After entering the desired search criteria into the appropriate fields, clicking the “Find Matching Clients” button will activate the “Client List” tab, filling that list with the result of the search.

Text can be entered into the search criteria fields in upper case, lower case, or mixed case letters. For the First name, Last name, Maiden name, and City, you can search on the first couple of letters (e.g., “ca” will match the last name “Carter” and “dov” matches the city of Dover). For the street address, you can search on any part (e.g., “ma” will match “1234 Main Street”). This allows you to search for the street name and ignore the house number.

Be careful using fields such as “Middle Initial” or even “Social Security Number”, as that information may not have been entered into the database for the target client! If the search list doesn’t return the desired individual, use different field(s) and try again. Required data fields that can be depended on are: First Name, Last Name, and Date of Birth. In addition, City, State, and Zip Code are good search fields, but can change between enrollments.

Client Search

<table>
<thead>
<tr>
<th>ID</th>
<th>Enrollment Type</th>
<th>DOB</th>
<th>First_NAME</th>
<th>Last_NAME</th>
<th>Maiden_NAME</th>
<th>MiddleInitial_NAME</th>
<th>SSN_IDNO</th>
<th>City_ADDR</th>
</tr>
</thead>
<tbody>
<tr>
<td>50276</td>
<td>Current</td>
<td>9/7/1958</td>
<td>Marcos</td>
<td>Carabajal</td>
<td>Carabajal</td>
<td></td>
<td></td>
<td>Georgetown</td>
</tr>
<tr>
<td>46669</td>
<td>Current</td>
<td>12/15/1980</td>
<td>Andrea</td>
<td>Caraballo</td>
<td>Caraballo</td>
<td>222629820</td>
<td></td>
<td>Newark</td>
</tr>
<tr>
<td>41264</td>
<td>Current</td>
<td>3/6/1955</td>
<td>Efrain</td>
<td>Caraballo</td>
<td>Caraballo</td>
<td></td>
<td>503861911</td>
<td>Wilmington</td>
</tr>
<tr>
<td>47511</td>
<td>Current</td>
<td>1/2/1993</td>
<td>Jessica</td>
<td>Caraballo</td>
<td>Caraballo</td>
<td>M</td>
<td>003047720</td>
<td>Newark</td>
</tr>
<tr>
<td>21935</td>
<td>Current</td>
<td>2/6/1958</td>
<td>Patricia</td>
<td>Caraballo</td>
<td>Caraballo</td>
<td></td>
<td>584116841</td>
<td>Wilmington</td>
</tr>
<tr>
<td>23432</td>
<td>Current</td>
<td>8/12/1984</td>
<td>Moralis</td>
<td>Caraballo-sanchez</td>
<td>Caraballo-sanchez</td>
<td></td>
<td></td>
<td>Georgetown</td>
</tr>
<tr>
<td>10085</td>
<td>Current</td>
<td>5/16/1957</td>
<td>Belma</td>
<td>Caramanna</td>
<td>Beamner</td>
<td>22264513</td>
<td></td>
<td>Newark</td>
</tr>
<tr>
<td>11937</td>
<td>Current</td>
<td>2/8/1946</td>
<td>Harriet</td>
<td>Carangi</td>
<td>Girdert</td>
<td>180305195</td>
<td></td>
<td>Newark</td>
</tr>
<tr>
<td>39269</td>
<td>Current</td>
<td>3/7/1969</td>
<td>Lisa</td>
<td>Carango</td>
<td>Kufnella</td>
<td>161660219</td>
<td></td>
<td>Oceanview</td>
</tr>
<tr>
<td>47310</td>
<td>Current</td>
<td>11/8/1966</td>
<td>Michelle</td>
<td>Carannante</td>
<td>Boone</td>
<td>221581463</td>
<td></td>
<td>Seaford</td>
</tr>
</tbody>
</table>

*Figure 8: Client Search: The List Tab (Part 1 of 2)*

If the desired client appears in the list (see Figure 8: Client Search: The List Tab (Part 1 of 2)), click on the appropriate link to the left of the name.

View: This results in a read-only Enrollment document, which cannot be altered.
**Edit:** This edits the selected Enrollment record. This link is available only if the user has “Enroll New” or “Reenroll Existing” permissions.

**Print:** This prints (or re-prints) the Welcome Letter for the selected Enrollment, performing the same action as the Batch Print process for a single individual client enrollment. This link is available only if the user has “Reenrollment Letters”, or “Welcome Letters” permissions.

Note that the Client List columns will resize according to the amount of text within. The Client List automatically splits into multiple pages if the list is large enough (the current page limit is set to 10 rows).

To sort the Client List by a particular column, simply single click that column’s header text (e.g. clicking on “Last Name” will sort the entire list by the clients’ last names.

<table>
<thead>
<tr>
<th>OR</th>
<th>State_CODE</th>
<th>Street_ADDR</th>
<th>Zip_ADDR</th>
<th>EntryBy_NAME</th>
<th>InterviewDate</th>
<th>EditDate</th>
<th>EnrSite_NUMB</th>
<th>HealthHome</th>
<th>AssignedDoctor</th>
<th>MedicaidAppStatus</th>
<th>MedicaidStatus</th>
</tr>
</thead>
<tbody>
<tr>
<td>n</td>
<td>DE</td>
<td>204 East Market St</td>
<td>19947</td>
<td>RQ</td>
<td></td>
<td></td>
<td>159</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>934 Old Baltimore Pk</td>
<td>19702</td>
<td>RQ</td>
<td></td>
<td></td>
<td>999</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>213 West Ave St</td>
<td>19804</td>
<td>WM</td>
<td>9/22/2009</td>
<td></td>
<td>302</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>934 Old Baltimore Pk</td>
<td>19702</td>
<td>RQ</td>
<td></td>
<td></td>
<td>999</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>312 28th St</td>
<td>19802</td>
<td>PS</td>
<td>3/10/2006</td>
<td></td>
<td>100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>327 S RAILROAD AVE</td>
<td>19947</td>
<td>MC</td>
<td></td>
<td></td>
<td>150</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>155 Autumn Horseshoe</td>
<td>19702</td>
<td>MC</td>
<td></td>
<td></td>
<td>100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>34 Lynch Farm Dr</td>
<td>19713</td>
<td>RQ</td>
<td>12/21/2010</td>
<td></td>
<td>999</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>13 Sussex Ave</td>
<td>19970</td>
<td>AD</td>
<td></td>
<td></td>
<td>150</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n</td>
<td>DE</td>
<td>26374 Green Star Rd</td>
<td>19973</td>
<td>EW</td>
<td></td>
<td></td>
<td>154</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Figure 9: Client Search: The List Tab (Part 2 of 2)

**ENROLL NEW**

Before a client can be entered into the new enrollment system, it must first be determined whether or not they currently exist in the CHAP-SFL system. **Reminder:** an individual may exist in the system and yet be ineligible for any services. All who apply for CHAP and/or SFL services are permanently recorded in the system, and given a unique Client ID number, even if they don’t qualify for either CHAP or SFL.

If the client does exist in the system already, then they need to be “re-enrolled”, rather than “enrolled”, even if they don’t currently qualify for any benefits. This is done by selecting “Reenroll Existing” from the Main menu then searching for the individual(s) to be reenrolled.

If the Client List doesn’t contain the desired client, and it is determined (e.g., through multiple searches – click on the “Search Criteria” tab to change what you’re looking for and try again.) that the Individual has never been a Client, then clicking on the “Add New Client” button will do two things when changes are saved:

1. Create a new client, assigning the individual a unique Client ID.
2. Create a new Enrollment record for that new Client ID.
The Client Search screen is used in several places in the CHAP-SFL Enrollment application, so this “Add New Client” button may not always be available, in which case you’re in a place where creating a new client is either not allowed or not possible.

Information entered as part of the Client Search will be used to fill-in otherwise empty fields on the Client Enrollment Information screen (see Figure 12: View / Edit / Enroll / Re-Enroll Client (Client tab)). These fields can then be changed, as desired.

See the discussion below on actually Enrolling clients.

**RENEW EXISTING**

If a client already exists in the CHAP-SFL enrollment system, they need to be reenrolled, rather than enrolled. When the “Reenroll Existing” function is selected from the Main Menu (see Figure 6), the Client Search screen is presented with a few changes from “View Clients”:

1. The “Add New Client” button is not available (see Figure 10: Client Search When Reenrolling One or More Clients)
2. To the left of the selected entry in the Client List, the “Edit” link is replaced by “Re-Enroll”, and “Print” is not available.

See the discussion below on actually Re-enrolling clients.
DISENROLL CLIENT

If it becomes necessary to force a client enrollment to expire immediately, the “Disenroll Client” function is selected from the Main Menu (see Figure 6: The Main Menu). The Client Search screen is presented with a few changes from “View Clients”:

1. The “Add New Client” button is not available (see Figure 11: Client Search When Disenrolling One or More Clients
Figure 10: Client Search When Reenrolling One or More Clients)
2. To the left of the selected entry in the Client List, the “Edit” link is replaced by “Dis-Enroll”, and “Print” is not available.
Figure 12: View / Edit / Enroll / Re-Enroll Client (Client tab)
ENROLLING OR RE-ENROLLING A CLIENT

Overview

The process of enrolling and re-enrolling someone into the CHAP-SFL system is pretty much identical, the chief difference being that, in a re-enrollment, information on the client already exists and is displayed on-screen. Client information is entered into the Client Enrollment Information screen (see Figure 12: View / Edit / Enroll / Re-Enroll Client (Client tab)).

The system automatically calculates the enrollment and expiration dates for new enrollments and re-enrollments, but not when simply editing an existing enrollment record. The user will be able to edit the enrollment and/or expiration dates, depending on their permissions. If one of these two fields is disabled, then that permission has not been given. Permission to change the enrollment date is given separately from the expiration date. Whenever the Enrollment Date is changed, the Expiration Date will automatically change as well to a date one year from the new Enrollment Date. However, when the Expiration Date is manually changed, the Enrollment Date is not affected.

The Client Enrollment Information screen is divided into multiple tabs, keeping the data entry process organized while at the same time keeping each screen to a reasonable length thus minimizing scrolling.

If at any time during the Enrollment or Re-enrollment process it becomes necessary or desirable to enter what the legacy CHAP system called a “Comment”, clicking on the “Case Notes” button will save the Client information entered so far, and display the separate “Case Notes” screen. See Figure 26: Case Management: List All Tab and the discussion on Case Management for more information.

Before clicking on the “Lookup MCI#” button at the top of the screen, it is strongly recommended that the entire Client tab be completed, thus giving that lookup process enough information on the client to locate them in the state information system if they exist, or create a new MCI record if they do not.

Client Addresses

Clicking the “Copy Home Address” button copies the “Home Address” fields to the “Mailing Address” fields, overwriting whatever is present. If, however, the “Mailing Address” fields are left blank when the enrollment record is saved (using the “Save All” button at the top of the screen), they will be filled-in automatically from the “Home Address”. The result is that, under normal circumstances, the “Mailing Address” won’t be left blank.

Race

The available answers in each of the Race drop-down lists on the Client tab are:

- White
- Black or African American
- Asian
- Native Hawaiian or Other Pacific Islander
- American Indian or Alaskan Native
- Unknown

Add Household Member

When adding a new Household Member record to the current enrollment (see Figure 13), the system will first perform a “Save All” in order to guarantee that a unique Client ID number exists to link that enrollment record to the new Household Member record(s).

![Add Household Member](image)

**Figure 13: Popup Dialog to add/edit a member of the client’s household**

**MCI Numbers**

The MCI number is used by the State of Delaware to associate the records of a specific individual across all state information systems, and is required for all CHAP / SFL clients. Clicking the “Lookup MCI #” button will allow the User to search for the current client in the existing MCI database. If the Client is in the resulting list (see Figure 14), clicking the word “Select” beside their name will return the Client’s existing MCI number to the enrollment screen. Or, if that individual doesn’t yet exist in the MCI database, create a new record for them by clicking the “Create New Participant” button at the top of the “MCI Client Search” screen (see Figure 14). This will add the Client to MCI, and return their new MCI number.
### MCI Search Window

Enter your search criteria and click ‘Search’

Note: you must enter at least one search field.

**Client Name:** Marcus Carballo

**Sex:** Male

**Search**

Click ‘Select’ next to the client name you would like to use for this client.
If you do not find this client click here: Create Participant.

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Search Name Score</th>
<th>Sex</th>
<th>Race</th>
<th>Birth Date</th>
<th>Name Type</th>
<th>MCI Number</th>
<th>SSM</th>
<th>Correct Merged MCI Number</th>
<th>Client Name 2</th>
<th>Birth Indicator</th>
<th>Date Of Death</th>
<th>Street Address One</th>
<th>Zip Code</th>
<th>Street Address Two</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Google, Mary</td>
<td>E193</td>
<td>F</td>
<td>CA</td>
<td>1973-01-01</td>
<td>0</td>
<td>175291</td>
<td>123456789</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td>P.O. BOX 177</td>
<td>19538</td>
<td>437 MAIN ST</td>
<td></td>
</tr>
<tr>
<td>Marcos, Antonio</td>
<td>E183</td>
<td>M</td>
<td>HS</td>
<td>1964-01-12</td>
<td>A</td>
<td>504820</td>
<td>5852597935</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td>13 KAYAK CT</td>
<td>19702</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marcos, Carlton</td>
<td>E182</td>
<td>M</td>
<td>CA</td>
<td>1992-02-07</td>
<td>R</td>
<td>719278</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td>PO BOX 414</td>
<td>19975</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marcos, James</td>
<td>E181</td>
<td>M</td>
<td>CA</td>
<td>1971-01-01</td>
<td>R</td>
<td>1771423</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marcos, Mario</td>
<td>E181</td>
<td>M</td>
<td>HS</td>
<td>1977-02-17</td>
<td>R</td>
<td>1439247</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td>323 WEST 6TH STREET</td>
<td>19001</td>
<td>2ND FL</td>
<td></td>
</tr>
<tr>
<td>Marcos, Michael</td>
<td>E193</td>
<td>M</td>
<td>MS</td>
<td>1982-08-24</td>
<td>R</td>
<td>715287</td>
<td>220281600</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td>1566 GRAVELLY BRANCH RD</td>
<td>19947</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marcos, Apol</td>
<td>E179</td>
<td>M</td>
<td>CA</td>
<td>1973-10-27</td>
<td>A</td>
<td>532441</td>
<td>222629465</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marcus, Carol</td>
<td>E170</td>
<td>M</td>
<td>CA</td>
<td>1970-05-27</td>
<td>R</td>
<td>519214</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 14: The Results of an MCI Search**
Once retrieved from the MCI web service, whether by selecting an existing individual or by adding the current client to the MCI database, the MCI number is displayed in the “MCI#” field, a read-only text box at the top of the Client Enrollment Information screen (see Figure 12: View / Edit / Enroll / Re-Enroll Client (Client tab). The only way to change this field is by clicking the “Lookup MCI#” button at the top of that screen.

![Client Enrollment Information](image)

**Figure 15: Top Portion of the Enrollment Screen Showing the MCI Field and Lookup Button**

At minimum, the search for an existing MCI client requires either a valid Social Security Number or, if that isn’t available, the client’s name and sex. An error will be generated if the lookup button is clicked without this information filled-in. Note: Because it is possible for the MCI database to lack the Social Security Number for a particular client, the SSN lookup may fail, requiring the system to fall back on the name and sex search.

Before clicking on the “Lookup MCI#” button, it is strongly recommended that the entire Client tab be completed, thus giving the lookup process enough information on the client to locate them in the state information system if they exist, or create a new MCI record if they do not.

The results of an MCI search will appear in the “MCI Client Search” screen (see Figure 14). Listed will be all clients (up to a maximum of 100) that match the search criteria. The fields returned are as follows:

- **Client Name** (e.g., Smith, John A Jr).
- **Search Name Score** (e.g., 099)
- **Sex** (e.g. M)
- **Race** (e.g. CA)
- **Birth Date** (e.g. 1998-06-08)
- **Name Type** (e.g. R)
- **MCI Number** (e.g. 1016453)
- **SSN** (e.g. 123456789)
- **Correct Merged MCI Number** (e.g. 0) (for duplicate client entries)
- **Client Name 2** (client maiden name)
- **Birth Indicator** (multiple birth indicator)
- **Date Of Death**
- **Street Address One** (e.g. 2009 MAIN ST)
- **Zip Code** (e.g. 19801)
- **Zip Code Suffix**
- **Street Address Two**

If one of the individuals in that list is the client being interviewed, the “Select” link next to that person should be clicked. Doing so will return that individual’s MCI number to the Client Enrollment...
Information screen. If the client does not appear in the list, then they must be added, using the “Create New Participant” button.

**Note:** The “Create New Participant” process requires that the following information be entered into the Client Enrollment Information screen. These fields in the MCI database will be updated whenever an enrollment record is saved.

- Last Name
- First Name
- Middle Initial
- Sex
- Race
- Birth Date
- Social Security Number
- US Citizen
- Home Address – Including the Apartment, City, State, Zip, and County fields.
- Home Phone Number
Figure 16: View / Edit / Enroll / Re-Enroll Client (Eligibility tab)
Deductible

Question #4 on the eligibility tab will only show one amount line, next to either “Yes” or “No”, depending on what is selected. These two are actually the same field, so that a dollar amount entered in one will appear in the other if the user switches between “Yes” and “No”.

![Figure 17: View / Edit / Enroll / Re-Enroll Client (Access And Utilization tab)](image)
Admitted to Hospital / Hospital Emergency Room

On both question #15 (When was the last time you went to a hospital Emergency department for care?) and #16 (When was the last time you were admitted to the hospital?) on the Access tab, the “how many times” prompt and text box are only visible if the user selects “1-Within the past 6 months (0 to 6 months)” as the answer. The answers offered in the “when was the last time” dropdown for both question 15 and 16 are:

- Within the past 6 months (0 to 6 months)
- Within the past year (6 to 12 months)
- Within the past 2 years (1 to 2 years ago)
- Within the past 5 years (2 to 5 years ago)
- 5 or more years ago
- Don't know / Not Sure
- Never
- Refused
- new one

If question #16 is answered “Never”, then all of question #17 (What were the reasons for your last hospitalization?) is disabled and must be skipped. Otherwise, you have to answer question #17 and provide the reason for the Client’s most recent stay in the hospital (see Figure 18).

**Figure 18: Hospitalization Dialog**

**Hospitalization Reason**

When adding a new Hospitalization Reason record to the current enrollment (from Question #17 on the Access tab), the system will first perform a “Save All” in order to guarantee that a unique ID number exists to link that enrollment record to the new Hospitalization record(s) before displaying the “Edit Hospitalization” screen (see Figure 18). Since there may be more than one reason for the Client’s most recent stay in the hospital, the “Add New Reason” button on the Access tab (see Figure 17) can be used multiple times on the same enrollment application to add all the reasons.
### Health

19. In the past 6 months, have you had any health problems?
   - Yes
   - No

20. Have you or any member of your family had cancer?
   - Yes (Enter details below)
   - No (skip to question 21)

#### Add New Family Record

21. Currently, do you smoke cigarettes, cigars, pipes or use other tobacco products?
   - Yes
   - No

22. Do you live in a house with a basement below ground level?
   - Yes
   - No

23. Has a doctor, nurse or other health professional ever told you that you have diabetes?

24. Has a doctor, nurse or other health professional ever told you that your blood cholesterol is high?

25. Has a doctor, nurse or other health professional ever told you that you have high blood pressure?

26. Female only - Are you pregnant or do you plan to become pregnant in the next year?
   - Yes
   - No
   - Does not apply (Male)

#### Figure 19: View / Edit / Enroll / Re-Enroll Client (Health tab)

### Health Problems

If Question #19 is answered “Yes”, then the date and a description of the problem must be answered in the supplied text boxes. Otherwise, skip to Question #20.

### Add New Family Health Record

Question #20 on the Health tab asks for the Cancer history of the client’s immediate family. A family member (including the Client) should only be added to the list if “Have you or any member of your immediate family had cancer?” is answered “Yes”. Otherwise, skip to the next question, #21, “Currently, do you smoke cigarettes, cigars, pipes, or use other tobacco products?” Note that, in the family record list, columns will resize according to the amount of text within. The list automatically splits into multiple pages if the list is large enough (the current page limit is set to 10 rows).
When adding a new Family Cancer record to the current enrollment, the system will first perform a “Save All” in order to guarantee that a unique ID number exists to link that enrollment record to the new Family Cancer record(s). The new enrollment record will be given a CHAP record status of “1-Interview in Progress” and an SFL record status of either “5-Enrollment Record in Progress” or “6-Re-Enrollment Record in Progress”, depending on whether this is an enrollment or reenrollment.

![Figure 20: Popup dialog - Who in the family had cancer](image)

**Identify the Individual Family Member**

If the description of the selected individual (on the Family Cancer screen) is “Other on Father’s side”, “Other on Mother’s side” or “Other household member”, then the “Specify Other” text box must be filled in, identifying who that “other” person is in relation to the Client. The individuals listed in the drop down are:

- Self
- Brother
- Sister
- Son
- Daughter
- Other on Mother's Side (please specify)
- Other on Father's side (please specify)
- Other Household Member (please specify)

**Identify the Cancer Type**

If the Cancer Type selected on the Family Cancer screen is “Other”, then the “Specify Other” text box must be filled in, identifying that “other” cancer type. The cancer types listed in the drop down are:

- Breast Cancer
- Cervical Cancer
- Ovarian Cancer
- Colorectal Cancer
- Prostate Cancer
- Other (please specify)
Medicaid Application Status

If the reason the Medicaid application was not completed was because of some “Other” reason than the ones listed in the drop-down list, then that reason must be explained in the “Specify other” text box to the right of the drop-down. The answers available in the Medicaid Status drop down list are:

- Pending Medicaid - income verification
- Pending Medicaid - green card verification
- Enrolled Full Medicaid
- Enrolled Limited Medicaid
- Denied Medicaid
- Pending Medicaid Review

The answers available in the Limited Medicaid drop down list are:

- Family Planning Only
- Emergency Services - Labor and Delivery

The answers available in the Medicaid Application Status drop down list are:

- has been submitted
- has been sent home with patient
- was not completed because previously denied MA
- was not completed because non citizen status
- was not completed because over income for MA
- was not completed because other, please specify

If the Medicaid application was, in fact, completed and submitted, then the date of submission must be entered into the “Date Submitted” text box (underneath the “Medicaid Application Status” drop-down list). If the application was not, in fact, submitted, then this date field must be left blank.

If the Medicaid submission was submitted, and then denied, then the “Date Denied” text box must be filled-in with a valid date.

Children Included in Medicaid Application
On the Medicaid tab, the “Add Child” button, as well as the Medicaid Child list itself will only be visible to the user if the “Children included in Medicaid application” question is answered “Yes”. Note that the Medicaid child list columns will resize according to the amount of text within.

When adding a new Child Medicaid record to the current enrollment, the system will first perform a “Save All” in order to guarantee that a unique ID number exists to link that enrollment record to the new Child Medicaid record(s). The new enrollment record will be given a CHAP record status of “1-Interview in Progress” and an SFL record status of either “5-Enrollment Record in Progress” or “6-Re-Enrollment Record in Progress”, depending on whether this is an enrollment or reenrollment.

The choices available in the “Referral” drop down list when adding a child to the Medicaid Application are:
- Medicaid
- DHCP
- CHAP
- NA
- Limited Medicaid

![Figure 22: Popup Child Medicaid Dialog](image)

![Figure 23: View / Edit / Enroll / Re-Enroll Client (CHAP Information tab)](image)
Income Level

The “Income Level” field on the CHAP tab (see Figure 23: View / Edit / Enroll / Re-Enroll Client (CHAP Information tab)) is automatically calculated from income and number of people in the household, and determine the correct letter-code (A, B, C, D, or E), from the following calculation:

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level A</td>
<td>Enrollee has income below 100% of the Federal Poverty Level and would otherwise be eligible for public coverage were it not for some disqualifier.</td>
</tr>
<tr>
<td>Level B</td>
<td>Enrollee has income 100 to 124% of the Federal Poverty Level</td>
</tr>
<tr>
<td>Level C</td>
<td>Enrollee has income 125 to 149% of the Federal Poverty Level</td>
</tr>
<tr>
<td>Level D</td>
<td>Enrollee has income 150 to 174% of the Federal Poverty Level</td>
</tr>
<tr>
<td>Level E</td>
<td>Enrollee has income 175 to 200% of the Federal Poverty Level</td>
</tr>
</tbody>
</table>

This field can only be filled-in by the system (i.e., the user cannot enter or change its value).

**CHAP Enrollment Status**

The default CHAP Enrollment status is automatically calculated by the system based on information entered into the enrollment form, and displayed as a selection in the “CHAP Enrollment Status” drop-down list box. The user can manually override this selection by picking a different option in the drop-down list.

The possible CHAP status codes are as follows:

1 = Interview in progress  
2 = Application ready for review  
3 = Central Office review  
4 = Pending Medicaid review  
5 = Pending CHAP - no medical home  
6 = Pending CHAP - Medicaid Appl. required  
7 = Pending CHAP - Income verification  
8 = Enrolled CHAP  
9 = Patient Non-response  
10 = Referred to VA  
11 = Not Eligible for CHAP  
12 = Re-determination of eligibility req  
13 = CCC Review  
14 = Pending Re-Enrollment

**Referrals**

The enrollment system allows for multiple referrals to be reviewed, edited, and entered from the Enrollment Application screen. Note the referral list columns will resize according to the amount of text within. The list automatically splits into multiple pages if the list is large enough (the current page limit is set to 10 rows).

The available answers in the “Referral” drop down list on the CHAP tab are:
- Pharma, Mrf. Patient Assistance
- Delaware Prescription Assistance
- Community Agency, please specify
- State Service Center, please specify
- CHC, please specify
- Other, please specify

If the Referral text contains the word “other” or “specify”, the Edit Referral screen (see Figure 24) will cause the “Specify Referral” text box to be visible as a required field. Otherwise, “Specify Referral” will be hidden, its contents (if any) cleared.

![Add New Referral](image)

*Figure 24: Enrollment Referral Dialog*
SFL Enrollment Status

The SFL Information tab (see Figure 25) contains the SFL Enrollment Status, a value which indicates whether or not the Client is eligible for SFL services. This is a calculated field that cannot be changed manually. The data entered elsewhere in the enrollment (especially the client’s date of birth) determines which status is assigned. The possible status codes are as follows:

<table>
<thead>
<tr>
<th>Code</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>None/Undetermined</td>
</tr>
<tr>
<td>1</td>
<td>Active Enrollment</td>
</tr>
<tr>
<td>2</td>
<td>Inactive - Terminated</td>
</tr>
<tr>
<td>3</td>
<td>Inactive - Expired Age &lt; 65</td>
</tr>
<tr>
<td>4</td>
<td>Inactive - Ineligible</td>
</tr>
<tr>
<td>5</td>
<td>Inactive-Expired Age 65+</td>
</tr>
</tbody>
</table>

Note: For illustration purposes only. In actual use, not all cancers will be shown.
SFL Eligibility

At the bottom of the SFL Information tab is a section that indicates the eligibility for each type of cancer service: breast, cervical, colorectal or prostate. If the Client is not eligible for any one of these, then the reason will be given.

If a Client is not eligible for a particular cancer screening service by reason of Gender, then that cancer type will not appear on the screen at all. Only Females are eligible for Breast and Cervical services, while only Males are eligible for Prostate services. Colorectal cancer services are available to both Males and Females.

If the client is eligible for a particular Screening for Life cancer screening service, then “Does qualify” will appear next to the service. Otherwise, “Does not qualify because” will appear followed by a list of reasons, one of which will be check marked. These checkboxes are calculated by the program and cannot be changed by the user.

When a client doesn’t qualify for a particular cancer screening service, the user can force qualification by placing a checkmark in the “Override (force eligibility)” box. The Override can later be reversed by un-checking the box, making the client ineligible once more. However, this Override checkbox is not available when the client does qualify for a service. In other words, the system will not allow a client to be made ineligible by checking this box on an eligible individual.

The three eligibility icons on the left side are used both on this screen and on the Screening Form Summary in the legacy SFL Windows application as a quick-reference eligibility indicator. Their meaning is as follows:

- **Green checkmark**: The client is eligible for screening and diagnostic services for this cancer type.
- **Yellow checkmark**: The client’s eligibility for screening or diagnostic services has been forced via an override. The client would not otherwise be eligible for this cancer type.
- **Red “X”**: The client is not eligible for screening or diagnostic services for this cancer type.

Saving an Enrollment or Re-enrollment

Before saving any newly-added enrollment application user must read the text of the consent form to the client, and ask for their consent. Checkmark the “client consent” checkbox at the top of the form once they have agreed.

In order to save the enrollment and exit back to the main menu, the “Save All” button is clicked. Once an Enrollment application has been saved, whether or not a Welcome/Eligibility/Ineligibility status letter can be printed will be determined largely by the CHAP and SFL enrollment status. Each status (CHAP and SFL are assigned separately) must be set to eligible or ineligible. If either one has been given a “pending”
or “in progress” status, then the enrollment application, while saved, will be considered incomplete. Only completed enrollment applications are eligible for Welcome or Denial letters.

Before clicking on the “Save All” button, you should review the entire Enrollment application to make certain that it is correct and complete.

Exit Without Saving the Enrollment

In order to exit the Enrollment screen without saving the information, the “Cancel” button at the top of the screen can be clicked. However, be aware that in that case, any changes to the enrollment application record will be lost..
While Enrolling, Re-Enrolling, Editing, or Viewing a Client Enrollment record, the option to add a Case Note (or “Comment” as it was called in the legacy CHAP system) is present. If this is a new client enrollment or changes have been made to an existing enrollment, the enrollment record will need to be saved to the system before a Case Note can be added. This intermediate save takes place automatically when the “Case Notes” button on the enrollment application screen is clicked.

The Case Management Notes screen displays a list of all case notes that have been added to the system for a specific client. Note that this includes Case Notes that have been added by the legacy SFL Windows application, as well as any Enrollment ones.

Clicking on a column header on the “List All Notes” page will sort the list by that column.
Case Notes vs. Comments

Multiple individual Case Notes may be added to each client enrollment.

Rather than edit the same Case Note to add information to it, you can (and should) create a new Case Note for each separate subject matter.

Figure 27: Case Management: Details Tab

Writing a Note

Clicking the “Select” link to the left of a particular Case Note takes the User to the “Single Note Details” tab (see Figure 26), populating it with the information from that note. Clicking the “Add New Case Note” button also takes the User to the “Single Note Details” tab, but displays a blank note, with the exception of the “Edit By” and “Edit Date” fields, which are filled-in by the system with the User’s login name and the current date. The contents of these two fields cannot be changed. The “Form Number” field can be skipped, as it refers to an SFL Screening Form Number, which does not apply to an enrollment.

Reminders

Note that the various “Reminder” fields at the bottom of the “Single Note Details” tab are intended for use by the Screening for Life Windows application, and do nothing in the Enrollment Web Application.
If the “Reminder” box is not check marked, then the whole “Start Reminders” box at the bottom of the page will be hidden from the user.

Differences from SFL

The legacy SFL system allows the user to add a new “Topic” merely by typing something into the edit portion of the drop-down box. Unfortunately, this uses a mechanism inappropriate for the Web based application, so that feature is not available in this version of the program. New topics will need to be approved and added by Administrative personnel using the SFL Windows application.

Printing Case Notes

Clicking the “Print Report” button results in a report containing all Case Notes for the current client (see Figure 28).

![Figure 28: Sample Case Notes Report for a single client](image-url)
PRINTING REENROLLMENT AND WELCOME LETTERS

When it has been determined that an individual is eligible (or ineligible) for CHAP and/or SFL services, a letter must be printed and mailed out to inform the individual of that fact. Normally, these letters are printed as a batch (in fact, the legacy SFL application refers to this process as “Batch Print”). There are two “batch print” commands in the CHAP-SFL enrollment application. The first, “Reenrollment Letters” (see Figure 29), prints letters targeted specifically at clients who are re-enrolling into CHAP and/or SFL. The second is “Welcome Letters” (see Figure 30), which targets those clients who are new to the program. In either case, letters are printed that are split into two sections: SFL, indicating whether the client is or is not eligible for various services. The second section is similar, but indicates eligibility for CHAP. The letter will also contain an identification card which will indicate SFL services, if any, along with the CHAP level (again, if any).

Normally, the Eligibility status letters sent to clients will come from the Central Office. However, because this function is role-driven, whether a user has the ability to see (and therefore print) these letters will be determined by the security role their Login ID has been assigned.
ADMINISTRATOR FUNCTIONALITY ("ADMINISTRATION")

OVERVIEW

The Administrator menu assists Central Office personnel in controlling aspects of the CHAP-SFL enrollment web application. Most of this functionality involves the editing of the various drop-down lists seen throughout the program.

![Figure 31: Admin - Told Have High Blood Pressure](image1)

![Figure 32: Admin - Told Have High Blood Pressure](image2)

BLOOD PRESSURE RESPONSES (SUPPORTS ENROLLMENT QUESTION #25)

This function controls, and makes changes, to the list of possible responses to Enrollment question #25, “Has a doctor, nurse, or other health professional ever told you that you have high blood pressure?”
Figure 33: Changing the Client ID connected to a Screening Form

CHANGE SCREENING CLIENT ID

Occasionally, for whatever reason, a set of SFL screening and/or diagnostic records will be assigned to the wrong Client. When this happens, all of the affected records need to be re-assigned to the correct Client.

When the Administration Menu option “Change Screening Client ID” is selected, the standard Client Search screen (see Figure 7) will be displayed. Upon selecting a particular client from the resulting list, this screen will be shown, allowing the client ID associated with a particular screening form to be changed, along with all records associated with that screening form number (e.g., all screening and diagnostic forms).

The following records are updated by this process:

- Screening
- Colorectal test
- Breast Diagnostics
- Cervical Diagnostics
- Colorectal Diagnostics
- Prostate Diagnostics
- Screening Alias
- Billing Data
- Breast Cancer Registry
- Cervical Cancer Registry
- Colorectal Cancer Registry
- Procedural Data
- Screening Cycles
CLIENT DE-DUPLICATION

When a Client is accidentally added to the System more than once, the duplicate needs to be removed. However, it isn’t as simple as just deleting (or “soft-deleting”) that duplicate, particularly if the Client ID has been used to create a screening, diagnostic, billing, or other System record. It requires a global substitution of the duplicate Client ID with the original one.

When the Administration Menu operation “Client De-Duplication” is selected, the user will first be presented with the standard Client Search screen (see Figure 7). Upon selecting a particular client from the resulting list as the “old” or “obsolete” client to be removed from the system (in actuality, this client record is only hidden, not removed entirely. See the discussion in the Overview of this Manual), the screen in Figure 34 will be displayed. The user can then enter a Client ID to replace the obsolete one everywhere that old Client ID is referenced (Screening forms, Diagnostic forms, Case Notes, etc). The user will be asked the “are you sure” question after they click on “Save Changes”.

The following actions are performed by the software:
1. The old Client ID record is marked “Deleted” (Note: this is the “Soft-delete” flag mentioned in the Overview of this Manual).
2. The new Client ID record is marked “Not-Deleted”, reversing the effects of any previous deletion.
3. All enrollment records for the old Client ID are immediately expired.
4. A new enrollment record is created using the new Client ID
5. All SFL screening and diagnostic forms that currently use the old Client ID are changed to use the new Client ID
6. The Audit table will be updated to record that this de-duplication was performed and by whom.
7. The new enrollment record, its various fields filled-in with default values, will be displayed in edit mode, allowing those values to be manually changed. These default values will be drawn from the old client’s now-expired “current” enrollment record.

The following records are updated by this process:

- Client
- Enrollment
- Case Notes
- Screening
- Colorectal test
- Breast Diagnostics
- Cervical Diagnostics
- Colorectal Diagnostics
- Prostate Diagnostics
- Screening Alias
- Billing Data
- Breast Cancer Registry
- Cervical Cancer Registry
- Colorectal Cancer Registry
- Procedural Data
- Screening Cycles
CHAP RECORD STATUS

This function controls, and makes changes, to the list of possible CHAP Enrollment record status choices on the CHAP Information tab of the online Enrollment form (see Figure 23).
CHILD ENROLL CODES

This function controls, and makes changes, to the list of possible child enrollment codes used in the Edit Medicaid Child Enrollment pop-up dialog box (see Figure 22). This dialog box is displayed from the “Children included in Medicaid application” question at the bottom of the Medicaid Information tab of the enrollment application (see Figure 21).
View Client History

Figure 39: View all Enrollment Records for One Client

CLIENT HISTORY

The Client History screen allows the Administrator to view prior, as well as current, enrollment application records. This functionality is restricted to the Administrator in order to avoid the confusion of someone mistaking a prior enrollment for the current one.

When the Administration Menu option “Client History” is selected, the user will first be presented with the standard Client Search screen (see Figure 7). Upon selecting a particular client from the resulting list, this screen will be displayed (see Figure 39), allowing the user to select a current or previous enrollment record to be changed, using the standard Edit Enrollment screen. Permitted changes include enrollment and expiration dates. Changes will not result, or require, a re-enrollment to be performed. Functionality connected to enrollment / re-enrollment (e.g., printing welcome packages) and adding Case Notes will be disabled.
DENIED MEDICAID

This operation allows an Administrator to add or edit the reason the client was denied Medicaid coverage (An answer of “Denied Medicaid” to the Medicaid Status question in Figure 21: View / Edit / Enroll / Re-Enroll Client (Medicaid tab)). Note: the current version of the Web Application does not make use of this value.

Figure 40: Admin - Denied Medicaid

Figure 41: Admin - Denied Medicaid
DIABETES RESPONSE

This operation allows an Administrator to add or edit the possible answers to question #23 on the health Information tab (see Figure 19).
HEALTH HOME

This operation allows an Administrator to add or edit the possible Health Home answers on the CHAP Information tab (see Figure 23).
HEALTH PROVIDER TYPES

This operation allows an Administrator to add or edit the possible answers to question #13 on the Access and Utilization tab (see Figure 17).
INELIGIBLE REASONS

This operation allows an Administrator to add or edit the possible reasons the client is ineligible for CHAP on CHAP Information tab (see Figure 23).
LAST VISITS

This operation allows an Administrator to add or edit the possible answers to both question #15 and #16 on the Access and Utilization tab (see Figure 17).
LIMITED MEDICAID

This operation allows an Administrator to add or edit the possible answers to the “Limited Medicaid” question on the Medicaid Information tab (see Figure 21).
Figure 54: Admin - Medicaid Application Status

Figure 55: Admin - Medicaid Application Status

**MEDICAID APPL STATUS**

This operation allows an Administrator to add or edit the possible answers to the “Medicaid Application Status” question on the Medicaid Information tab (see Figure 21).
This operation allows an Administrator to add or edit the possible answers to the “Medicaid Status” question on the Medicaid Information tab (see Figure 21).
NO DOCTOR REASON

This operation allows an Administrator to add or edit the possible check boxes under question #10 on the Access and Utilization tab (see Figure 17).
REFERRAL SOURCES

This operation allows an Administrator to add or edit the possible referral sources on the “Edit Enrollment Referral” dialog box (see Figure 24), called from the “CHAP Information” tab.
SFL ENROLLMENT STATUS

This operation allows an Administrator to add or edit the possible SFL Enrollment Status description on the “SFL Information” tab (see Figure 25: View / Edit / Enroll / Re-Enroll Client (SFL Information tab)).

Figure 62: Admin - SFL Enrollment Status

Figure 63: Admin - SFL Enrollment Status
THREE PAP RULES

This operation allows an Administrator to add or edit the possible SFL Three Pap Rule results Enrollment Status description on the “SFL Information” tab (see Figure 25). Note: the current version of the Web Application does not make use of this value.
VIP DOCTORS

This operation allows an Administrator to add or edit the available list of VIP doctors for their description on the “SFL Information” tab (see Figure 25). Note: the current version of the Web Application does not make use of this value.