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INFORMATION MEMORANDUM
SPD-IM-02-054
Date: September 27, 2002

TO: Area Agency on Aging Directors CHS SDA Managers
CHS/AAA Field Managers and Staff CHS SDA Assistant Managers
SPD Managers and Staff CHS Central Office Managers

SUBJECT: Client Information System Changes Implementation October 7, 2002.

INFORMATION: As part of the overall DHS reorganization, the Office of Information Systems (OIS) is working to provide more integrated information systems. The first step to integration is the ability to uniquely identify a client across the DHS information systems. The Client Information system (CI) was chosen as the centralized repository.

While the CI system is already used by several systems and a large number of DHS staff, the Child Welfare systems (IIS and FACIS) have not taken full advantage of CI on-line updates. The first phase of the Client Index Project is to modify the Child Welfare and CI systems to fully integrate and exchange information on-line, real time. The CW system changes will be implemented at a later date.

In order to accommodate the requirements of the Child Welfare systems, some existing CI screens have been modified to display additional data. The modifications to the existing CI screens will be implemented over the weekend of October 4, 2002. The modified screens should be available for use on Monday, October 7, 2002.

The attached ***Guide to Online Screen and Processing Changes*** is designed to provide staff who currently use the CI system with information about the CI changes. Modifications to Child Welfare systems are not discussed in this informational guide.

CONTACT INFORMATION:

CI Systems Problems:

DHS Help Desk 1-503-945-5623

NOTE: Please call all CI systems issues in to the Help Desk. This allows the CI project team and DHS information systems staff to have a point of contact, to coordinate activities, and to quickly assess the magnitude of the problem.

The Client Index Project

Guide to Online Screen and Processing Changes

Overview - The Client Index Project

As part of the overall DHS reorganization, the Office of Information Systems (OIS) is working to provide more integrated information systems. The first step to integration is the ability to uniquely identify a client across the DHS systems. The Client Information system (CI) was chosen as the centralized repository. This system is already used by several systems and a large number of DHS staff. One of the projects that OIS has undertaken is the expansion of the Client Information system under the name Client Index. The goal of the project is to provide a centralized repository and entry point for generic person-related information.

Staff in the former AFS and SDSO are already familiar with the CI system. Commonly used screens include CI-FIND, and Person Alias Update. The Client Maintenance (CM), Food Stamp Systems (FS), Electronic Benefits (EBT), TRACS, and Oregon ACCESS (OA) currently send person information to and receive person information from the CI system. CI acts to ensure that person data is uniform from system to system. Some other systems send information to CI but can not exchange information on-line, real time.

Client Information Project - Phase One

While the former AFS and SDSO have been using the CI system since its implementation, the former SCF (now Child Welfare) and its systems have not taken full advantage of CI. The first phase of the CI Project is to modify Child Welfare systems to fully utilize CI. This phase is actually being implemented in two parts. The CI changes will be implemented with this training/document. The changes to the Child Welfare FACIS system will be implemented later. In this document we will describe only those changes being implemented in the CI system. The integration of CW policy practices into CI required changes in two primary areas; the retention of a legal name and the recording of the level of verification for the data. To support these additional requirements, minor modifications have been made to some existing CI screens.

The following screens have been changed as part of Phase One Part 1:

- Person/Alias Update
- Add A Person
- Client Index Information History

Person/Alias Update Screen Changes

Overview

The Person Alias Update screen has undergone some modification to accommodate the Client Information changes. While the screen continues to function in essentially the same manner, field staff may notice the following changes.

Client Name

The Person/Alias update screen now displays two client name lines at the top of the screen. The first name line is titled “Pref Last,” etc... This name line reflects the preferred name of the client. This is the name that the client prefers to use. For example, a person with the legal name of “James Smith” may prefer to be called “Jim Smith”. Jim Smith will display in the preferred name line. In general, the programs administered by the former AFS and the former SDSO permit the client to be identified by a preferred name.

Child Welfare staff, however, must use the person’s legal name. A name line titled “Legl” has been added to the person alias screen. This line reflects the persons legal name. Although this field was added to meet a CW need the field is now available to any department application that requires the legal name.

```
WCIW031C          Person Alias/Update          07/16/2002 08:36 am
Fast path      EB
. Pref Last BIRD          1st SNOW          MI I TTL          V/R A CM
. Legl Last BIRD          1st SNOWY          MI TTL          V/R R OT
. SSN 123-45-6789 V/R A CM . Prime XX12345X . Sex F . Race W
. DOB 08/30/1942 V/R A CM . DOD N          V/R          . Lang          . Prnt
                                          Scroll ALL
Dsg  Last          First          MI Title
     BIRD          SNOWING
Dsg  Prime Designated Othr per Status
     AB12345A      N          N
Dsg  SSN          Othr per IPV Bendex Emp Wages UC Invalid
Last chg: 9/15/2002 Oper ID: HSXXX01 Src: CM Status: CP
70000I Ready
F1=Help F2=Asgn Prime F3=Exit F5=Refresh F6=Fast Path F7=Bkwd F8=Fwd F9=Save
F13=Access 1 F14=Access 2 F15=Manl F18=Copy F21=Prsn Merge F24=Prsn Split
```

Systems will select the appropriate name line when attempting to synchronize data with CI. The Client Maintenance system (CMS) and the Food Stamp system (FS) will both use the preferred name line. Child welfare systems will use the legal name line.

Verified/Reported and Source

The other significant change that staff will note on the Person Alias Update screen is the addition of fields labeled “V/R”. This field stands for “Verified or Reported”. Each piece of person data will now carry an indicator telling if the item has been verified by an outside source (e.g. birth certificate, etc...) or is simply being reported by the client as accurate information.

```

WCIW031C          Person Alias/Update          07/16/2002 08:36 am

Fast path      EB
. Pref Last BIRD          1st SNOW          MI I TTL      V/R A CM
. Legl Last BIRD          1st SNOWY          MI TTL      V/R R OT
. SSN 123-45-6789 V/R A CM . Prime XX12345X . Sex F . Race W
. DOB 08/30/1942 V/R A CM . DOD N          V/R          . Lang          . Prnt
                                          Scroll ALL

Dsg Last          First          MI Title
  BIRD          SNOWING

Dsg Prime Designated Othr per Status
. AB12345A          N          N

Dsg SSN          Othr per IPV Bendex Emp Wages UC Invalid

Last chg: 9/15/2002 Oper ID: HW12345 Src: CM Status: CP
70000I Ready
F1=Help F2=Asgn Prime F3=Exit F5=Refresh F6=Fast Path F7=Bkwd F8=Fwd F9=Save
F13=Access 1 F14=Access 2 F15=Manl F18=Copy F21=Prsn Merge F24=Prsn Split
  
```

There are three valid V/R indicator codes.

- V = Verified. The data has been verified by an outside source
- R = Reported. The data has been reported by the client as accurate information
- A = Assumed Verified. The data is assumed verified because it comes from an external information system whose program rules require that the data be verified. This systems generated code will be used primarily for certain

pieces of data coming from the CMS and FS systems that must be verified. Because the V/R indicator has not yet been added to the CM and FS systems, workers have no way to indicate whether an item is verified or reported when entering data into those systems. Therefore, the Assumed Verified code will display on CI for select data items fed from the CM and FS systems.

Along with the V/R indicator, is a source code. This indicates the item or document that the worker used in determining whether the information is considered Verified or Reported. Some source codes are system generated and cannot be entered directly by the worker. A list of valid Verification Source codes is attached at the end of this document.

The Verified/Reported indicator was added to ensure that if there is ever a situation in which a single data item is conflicting between systems, the item with the Verified code will take precedence. "Reported" items will be retained as alias information, but will not display as the designated data for that particular data item.

For example, if a CW system indicates that the person's Date of Birth is 1/1/50, and the CW worker has verified that information using a birth certificate that item will feed to CI as the client DOB with a "V" indicator and the verification source code of "BC". The DOB cannot be updated by any other system that contains only "Reported" DOB information.

Should a data item carry different Verified/Reported codes in various systems, CI will be updated according to the following rules:

- Verified information can only be updated by data marked as verified.
- Assumed verified information can be updated by data marked as either verified or assumed verified.
- Reported information can be updated by data marked as either reported, assumed verified, or verified.

The CMS, FS, and CI systems will return an error message if an attempt is made to update data outside of these rules.

A new screen, available to limited staff in the Central Office, has been developed to allow data to be changed if an assumed verified or verified code is set in error. As with other errors, any problems should be reported to the DHS Help Desk so

the issue can be identified as a system or data entry error and the correct group can be contacted.

Screen Layout

Some minor modifications have been made to the screen layout. Certain data items have shifted position. The changes are highlighted on the following screen print.

```
WCIW031C          Person Alias/Update          07/16/2002 08:36 am

Fast path      EB
. Pref Last BIRD          1st SNOW          MI  TTL      V/R A CM
. Leg1 Last BIRD          1st SNOWY          MI  TTL      V/R R OT
. SSN 123-45-6789 V/R A CM . Prime XX12345X . Sex F . Race W
. DOB 08/30/1942 V/R A CM . DOD N          V/R          Lang . Prnt
                                Scroll ALL

Dsg  Last          First          MI Title
    BIRD          SNOWING

Dsg  Prime Designated Othr per Status
.   AB12345A      N          N

Dsg  SSN          Othr per  IPV  Bendex  Emp Wages  UC  Invalid

Last chg: 9/15/2002 Oper ID: HSXXX01 Src: CM Status: CP
70000I Ready
F1=Help F2=Asgn Prime F3=Exit F5=Refresh F6=Fast Path F7=Bkwd F8=Fwd F9=Save
F13=Access 1 F14=Access 2 F15=Manl F18=Copy F21=Prsn Merge F24=Prsn Split
```

Add a Person Screen

The Add a Person Screen has been altered to allow entry of the legal name and verification codes corresponding to various pieces of person data.

```
WCIW090C          Add a Person          09/03/2002 03:11 pm
Fast Path      EB  Access Key
***** Enter Client Information *****
VRF/RPT  SOURCE
Pref Last  _____
Pref First _____
Pref Mid   _
Pref Title ____
DOB       _____
SSN       _____
Sex        _ (M/F)
Race       _ (W/B/I/H/A/O/U/P)
Deceased   _ (Y/N)
DOD        _____
Prime
Legl Last  _____
Legl First _____
Legl Mid   _
Legl Title ____
700001 Ready
F1=Help  F3=Exit  F6=Fastpath  F9=Edit/Save  Enter=Edit only
```

Person List

The Person List screen has been modified to indicate whether the name on the list is the Preferred Name, the Legal Name, or an Alias Name. Following is a sample of a screen that displays all three name types.

WCIW029I		Person List		09/16/2002 01:57 pm				
Fast path	EB	Access key						
SSN		Prime						
Last	BROWN	First	Name select A					
	NAM		More: - +					
SSN	Ali	Name	DOB	Sex	Prime	Br	LD	Prog
. 111-11-1111	P	BROWN, MISSUS	K	04/17/1950	F			
. 222-22-2222	L	BROWN, MISSUS	N	01/04/1984	F	AB11111A	2517	JD 5-RE
. 333-33-3333	P	BROWN, MISSUS	L	05/26/1952	F	AB22222A	0111	NM 4-AD FS-HH
. 444-44-4444	A	BROWN, MISSUS	J	02/23/1947	F	XY12345X	0312	HN D4-NO FS-DH
. 555-55-5555	P	BROWN, MISSUS		02/03/1920	F	ZZ12345Z		
.	P	BROWN, MISTER		04/30/1914	M	WW12345W		

26031I Select a person and press {ENTER} OR select another appropriate key.
F1=Help F2=Add F3=Exit F6=Fast Path F7=Bkwd F8=Fwd F11=Frst F13=Last F21=Merge

Client Index Information History Screen

The client information history screen has also been modified. This screen will now display the Verified/Reported indicator and the Verification Source code as part of the historical record. The historical record will also list the RACF ID of the person who made the change, and the name associated with that RACF ID.

```
WCIW146I                Client Index Information History          08/01/2002 09:58 AM
                                                                More:      >
Last: BIRD                First: SNOW                            MI: I  Title:
SSN 123-45-6789 Prime XX12345X Sex F Race W DOB 08/30/1942 DOD N

Preferred Name                Update Info
BIRD, SNOW I                 Date: 11/03/2001 Time: 08:33 PM
                               RACF: HSABC12-WORKER, JOHN Q
                               V/R:  A  Src: CM  Sys:  AFS CI

70000I Ready
F1=Help                F3=Exit                F7=Bkwd F8=Fwd
                               F19=Prev F20=Next
```

Verified/Reported Source Codes

Data Element
Name

Code **Verification Sources**

BC Birth Certificate
AD Adoption Decree
DI Divorce Decree
MD Marriage Decree
MS Military Service Papers
IM Immigration Papers
NP Naturalization Papers
PS Passport
DR Drivers License
OL OLCC Card
CI Certificate of Citizenship
TP TPQY
BE BENDEX

Reported Sources

SC School Records
WA Wage Stubs
VR Voter Registration
HS ID for Health and Social Service Programs
EM Employment Records
3P 3rd Party
SS Social Security Card
BA Baptismal Certificate
CO Confirmation Papers
HB Hospital Birth Record
FR Family Records
LI Life Insurance Policy
SD Support Decree
OT Other (Text Entry)
SE Self Reported

Values that can only be system generated:

CM Client Maintenance System
FS Food Stamp System
CS Client Split Process
SU Dept. of Child Support system – batch
AC ACCESS

Assumed Verified Sources

Values that can only be system generated:

CM Client Maintenance System
FS Food Stamp System

Date of Birth**Verification Sources**

BC Birth Certificate
 MS Military Service Papers
 IM Immigration Papers
 AR Adoption Records
 PS Passport
 DR Drivers License
 OL OLCC Card
 CI Certificate of Citizenship
 NP Naturalization Papers

Reported Sources

BR Baptism or Church Records
 HB Hospital Birth Records
 FR Family Records
 ML Marriage License
 EI Employee ID
 LI Life Insurance Policy
 SC School Records
 3P 3rd Party
 OT Other (Text Entry)
 SE Self Reported

Values that can only be system generated:

AC ACCESS
CM Client Maintenance System
FS Food Stamp System
CS Client Split Process
SU Dept. of Child Support system – batch

Assumed Verified Sources

Values that can only be system generated:

CM Client Maintenance System
 FS Food Stamp System

Date of Death**Verification Sources**

DE Death Certificate
 MS Military Service Records
 HR Hospital Record
 PR Physician Record

Reported Sources

BU Burial Records
 ON Obituary Notice
 3P 3rd Party
 OT Other (Text Entry)

Values that can only be system generated:

AC ACCESS
CM Client Maintenance System
FS Food Stamp System
CS Client Split Process
SU Dept. of Child Support system - batch

Assumed Verified Sources

Values that can only be system generated:

CM Client Maintenance System
FS Food Stamp System

SS Number

Verification Sources

SS Social Security Card
SR Social Security Records
MS Military Service Papers
TP TPQY
BE BENDEX

Reported Sources

EM Employment Records
SC School Records
SE Self Reported
3P 3rd Party
OT Other (Text Entry)

Values that can only be system generated:

AC ACCESS
CM Client Maintenance System
FS Food Stamp System
CS Client Split Process
SU Dept. of Child Support system - batch

Assumed Verified Sources

Values that can only be system generated:

CM Client Maintenance System
FS Food Stamp System