

CRM/MFP Web App Case Views Glossary

This glossary is meant to provide detail behind what each of the MFP Case views in the CRM web app displays and the filtering criteria behind each view.

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Active Views Detail

1) 3 Month Incentive Payment

This view is meant to assist MCO users with completion of incentive payments. It will show all cases that have transitioned more than 3 months ago that do not yet have an incentive payment complete.

Status Equals <u>Active</u>
Transition To Community On Older Than X Months <u>3</u>
Transition To Community On On or After <u>2/1/2015</u>
Enrollment Status Equals <u>Enrolled</u>
Incentive Payment (3 mos) Does Not Contain Data
Disenrollments (D) (Case)
Disenrollment From MFP On Does Not Contain Data
Participant
Enrolled In Managed Care Equals <u>Yes</u>

2) 12 Month Incentive Payment

This view is meant to assist MCO users with completion of incentive payments. It will show all cases that have transitioned more than 12 months ago that do not yet have an incentive payment complete.

Status Equals <u>Active</u>
Transition To Community On Older Than X Months <u>12</u>
Transition To Community On On or After <u>2/1/2015</u>
Enrollment Status Equals <u>Enrolled</u>
Incentive Payment (12 mos) Does Not Contain Data
Disenrollments (D) (Case)
Disenrollment From MFP On Does Not Contain Data
Participant
Enrolled In Managed Care Equals <u>Yes</u>

3) 365 Complete

All cases that have complete their MFP 365 day period. Indicated by the box "365 complete" being checked on a case. This field is completed by UIC-CON staff.

Status Equals <u>Active</u>
365 Days Completed Equals <u>Yes</u>

2) All Disengaged Cases.

All cases that are either not considering MFP or have dis-enrolled from MFP.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Individual is considering ...</u>	<u>Equals</u>	<u>No</u>
▼ <u>365 Days Completed</u>	<u>Equals</u>	<u>Yes</u>
▼ OR		
▼ <u>xxWithdrawal From MFP On</u>	<u>Contains Data</u>	
▼ <u>Enrollment Status</u>	<u>Equals</u>	<u>Dis-enrolled</u>

3) All Engaged Cases

All cases that are considering MFP or are currently enrolled in MFP and have not completed their MFP year.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Individual is considering ...</u>	<u>Equals</u>	<u>Yes</u>
▼ <u>Enrollment Status</u>	<u>Does Not Equal</u>	<u>Dis-enrolled</u>
▼ <u>365 Days Completed</u>	<u>Does Not Equal</u>	<u>Yes</u>

4) All MFP Cases

All MFP cases are included in this view.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
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5) Close to 365 Complete

Cases that are 11 months from their transition date and do not have a QOL year 1 survey.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Enrollment Status</u>	<u>Does Not Equal</u>	<u>Dis-enrolled</u>
▼ <u>365 Days Completed</u>	<u>Does Not Equal</u>	<input type="text" value="Yes"/>
▼ <u>Transition To Community...</u>	<u>Older Than X Months</u>	<input type="text" value="11"/>
▼ <u>QOL Survey Y1 On</u>	<u>Does Not Contain Data</u>	

6) Considering MFP, No Informed Consent

Cases considering MFP based on the case contact outcome that have not yet signed an informed consent.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Individual is considering...</u>	<u>Equals</u>	<u>Yes</u>
▼ <u>Informed Consent Signed</u>	<u>Does Not Equal</u>	<u>Signed</u>

7) Disenrolled Post-Transition

Cases that dis-enrolled from MFP post transition.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Transition To Community...</u>	<u>Contains Data</u>	
▼ <u>365 Days Completed</u>	<u>Does Not Equal</u>	<u>Yes</u>
▼ <u>Enrollment Status</u>	<u>Equals</u>	<u>Dis-enrolled</u>

8) Disenrolled Pre-Transition

Cases that dis-enrolled from MFP pre transition.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Informed Consent Signed</u>	<u>Equals</u>	<u>Signed</u>
▼ <u>Transition To Community...</u>	<u>Does Not Contain Data</u>	
▼ <u>Enrollment Status</u>	<u>Equals</u>	<u>Dis-enrolled</u>

9) Inactive MFP Cases

MFP cases that have been deactivated by an administrator.

▼ <u>Status</u>	<u>Equals</u>	<u>Inactive</u>
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10) My Engaged Cases

Only MFP cases that are considering MFP or enrolled and not dis-enrolled that are owned by the user logged in are shown.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Individual is considering...</u>	<u>Equals</u>	<u>Yes</u>
▼ <u>Enrollment Status</u>	<u>Does Not Equal</u>	<u>Dis-enrolled</u>
▼ <u>365 Days Completed</u>	<u>Does Not Equal</u>	<u>Yes</u>
▼ <u>Transition Coordinator (O...</u>	<u>Equals Current User</u>	

11) My MFP Cases

All MFP cases owned by the user logged in.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Transition Coordinator (O...</u>	<u>Equals Current User</u>	

12) Not Considering MFP

Cases that are not considering MFP based on the most recent case contact outcome.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Individual is considering...</u>	<u>Equals</u>	<u>No</u>

13) Not Contacted

Cases that have not been contacted

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Status Reason</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Face-To-Face Contact On</u>	<u>Does Not Contain Data</u>	

14) Not Contacted (More than 10 days)

Cases that have not been contacted and are past the 10 business day requirement for follow up.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Status Reason</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Face-To-Face Contact On</u>	<u>Does Not Contain Data</u>	
▼ <u>Must Contact Before</u>	<u>Last X Years</u>	<u>99</u>

15) Pre-Transition

Cases that have an informed consent signed but have not yet transitioned.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Enrollment Status</u>	<u>Does Not Equal</u>	<u>Dis-enrolled</u>
▼ <u>Informed Consent Signed</u>	<u>Equals</u>	<u>Signed</u>
▼ <u>Transition To Community...</u>	<u>Does Not Contain Data</u>	

16) Transition

Cases that have transitioned, have not completed their MFP year and have not dis-enrolled.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Enrollment Status</u>	<u>Does Not Equal</u>	<u>Dis-enrolled</u>
▼ <u>Transition To Community...</u>	<u>Contains Data</u>	
▼ <u>365 Days Completed</u>	<u>Does Not Equal</u>	<u>Yes</u>

17) Transitioned This Year

All cases that have a transition date in the current calendar year.

▼ <u>Transition To Community...</u>	<u>This Year</u>
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18) Unassigned

Cases that have not yet been assigned to an owner. These are new cases generated from new referrals.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Contact Participant</u>	<u>Does Not Equal</u>	<u>Yes</u>
<u>Select</u>		
▼ <u>Owning Team (Team)</u>		
▼ <u>Team</u>	<u>Contains Data</u>	

19) W/ Critical Incident Needing Attention

Cases with a critical incident that have not had an external review completed by UIC-CON.

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Enrollment Status</u>	<u>Does Not Equal</u>	<u>Dis-enrolled</u>
▼ <u>Transition To Community...</u>	<u>Contains Data</u>	
▼ <u>365 Days Completed</u>	<u>Does Not Equal</u>	<u>Yes</u>
<u>Select</u>		
▼ <u>Critical Incident Reports (M) (Case)</u>		
▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Date of external review</u>	<u>Does Not Contain Data</u>	