GOVERNMENT OF PUERTO RICO

Department of Health
Medicaid Program

Completed Online Change of Circumstance (COC) FDD Deliverable I.4.2.m.ii

PREE Project
Government of Puerto Rico

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Document Revision History

Version Number	Date	Description
0.1	7/20/2020	Initial Draft
0.5	8/28/2020	QC Review
0.8	10/23/2020	Initial Draft for Review
0.9	11/02/2020	Final Draft for Review
1.0	11/03/2020	Final Submission
1.1	11/03/2020	Updates per CR131: ■ Relocating Notice section to the Notice and Forms FDD
1.2	11/18/2020	CR131 - Final Draft for Review

1.3	6/4/2021	Initial Draft for Review: Updates per CR189 ■ Homepage ■ Sign up ■ <CR189> Reset ~~Set~~ Your Password ■ <CR189> Security Set-Up ■ <CR189> Security Code Verification (Selection) ■ <CR189> Security Code Verification ■ <CR189> Security question ■ Your Account ■ Your Profile ■ Your Settings ■ <CR189> Your Documents ■ <CR189> Notices ■ Select Change Types ■ Information About You ■ <CR189> Current Members ■ <CR189> Home Information ■ Home Member Information ■ <CR189> Address Summary ■ <CR189> Address Details ■ Exit ■ New PSPMPR Account ■ <CR189> External User Home ■ <CR189> Edit External User ■ Linking External User with Person Process (Modify) ■ Finalizing Linking and Unlinking Process (Modify) ■ Defining External User Privilege Process (New) ■ No Touch Online Application Process (Modify) ■ <CR189> Unsubmitted COC Process (New) ■ New Application Case from COC/Renewal Process (New) ■ Paperless Delivery Process (New) ■ PSPMPR Account Link Request Task (Modify) ■ Online Application Task (Modify) ■ New Account Notification (Modify) ■ Communication Setting Updated Notification (New) ■ Related Documents Section removed per CR189:

		▪ <CR189> Personal ~~Information Summary~~ ▪ <CR189> ~~Change Address~~ ▪ <CR189> Add and Remove ~~Household Member~~ ▪ <CR189> ~~Change Income~~
1.4	7/9/2021	Updates made to the following section per CR189 CIM: ▪ Prepopulated Forms ▪ Select Change Types ▪ General Information Summary
1.5	07/15/2021	<CR 189> Final Submission

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1 Acronyms

Table 1: Acronyms

Acronym	Definition
COC	Change of Circumstances
CMS	Centers for Medicare & Medicaid Services
FDD	Functional Design Document
ID	Identity
IC	Integrated Case
IV&V	Independent Verification and Validation
JAD	Joint Application Design
MFA	Multi Factor Authentication
OOTB	Out of the Box
PMO	Project Management Office
PREE	Puerto Rico Eligibility and Enrollment
PRMP	Puerto Rico Medicaid Program
PSPMPR	Portal de Servicios Programa Medicaid de Puerto Rico/ Puerto Rico Medicaid Program Services Portal
RIDP	Remote Identity Proofing
SI	System Integrator
SSN	Social Security Number
SQL	Structured Query Language
VIBES	Virgin Islands Benefit Eligibility System

2 Introduction

2.1 Purpose

The purpose of the Online Change of Circumstances (COC) Functional Design Document (FDD) is to present the design components of the enhancements being made to the Citizen Portal. The Citizen Portal is a citizen-facing application with features such as applying for health benefits, checking application and renewal statuses, downloading notices, and upload supporting documents.

2.2 Scope

The Citizen Portal FDD will document all the modifications/additions made to the Out of The Box (OOTB) screens, batches, tasks, notices, and notifications to support the enhancements of the Citizen Portal. The enhancements include:

- Accounts for the Puerto Rico Medicaid Program Services Portal (PSPMPR) can be created by a caseworker

- Users can submit a request online to link their case information to their PSPMPR account

- View information about their case information

- Submit an online application prepopulated with data from their case

- Apply for Retroactive Medicaid online

- Report changes online

- Complete renewal form online

- View notices online

- New notices and notifications

- No touch processing of online application

2.3 Not in scope

This design does not include database schemas, Structured Query Language (SQL) queries, Decision Summary Table implications, and other technical details required to fully implement the online intake application process via the Citizen Portal. Details related to reports, interfaces, online appeals, and multi-factor authentication will be covered in separate FDD's.

2.4 Team Members

Table 2: Team Members

Attendees	Organization
Camille Gray	PMO
Carlos Cruz	IV&V
Christina Lopez	IV&V
Janeth Merchan	PMO
Jesús Ayala De León	PRMP
Joenelly Olmo Encarnación	PRMP
John Zientara	SI
Marleen Pérez	PRMP
Raquel Ortega	PRMP
Stephanie Nieves	SI
Uma Guruswamy	SI
Vaidehi Padte	PMO

3 Key Assumptions

Below are the Key Assumptions made during the Fit/Gap and Design processes related to this FDD:

1. The Caseworker Portal and the Universal Access Responsive Web Application (Citizen Portal) functionalities represented within this document are based on Cúram Version 7.0.5 and customizations from other Cúram implementations.

2. The artifacts documented in this FDD serve as a direct input for the development effort. All documented designs have been technically assessed for feasibility; however, there may be instances during the build process where new or conflicting information may force the design to be updated. In these instances, the updated proposed design will be presented to Puerto Rico Medicaid Program (PRMP) for review and approval before any build activity commences.

3. The acronym "OOTB" refers to the base system functionality that is being transferred from a prior implementation and the implementations from

Release 1. This will be the base system that will be modified to meet Puerto Rico Eligibility and Enrollment (PREE) requirements for the Stabilization Release.

4. PRMP recognizes the practicality of accepting this assumption but conditions it on the features not documented within design documents being in compliance with regulations, the Puerto Rico Medicaid State Plan and Puerto Rico public policy.

5. OOTB functionality, which meets the state's needs, will not always be documented in detail unless there is a business or development-related reason to do so.

6. The OOTB Software documentation for Cúram can be obtained at the IBM website.

7. The Virgin Islands Benefit Eligibility System (VIBES) FDDs can be obtained at the PREE SharePoint site.

8. The PREE Glossary document is available on the PREE SharePoint.

9. The mockups provided within each 'Screenshot' section serves as a prototype of what the page might look like, however, these prototypes are subject to change due to the discretion of the development team to meet the requirements listed under the 'Description Modification and Addition' sections.

10. Prior to linking an External User to a Registered Person, the Registered Person cannot be an active member in more than 1 case. As person moves from cases, caseworker must ensure that person is not an active member on multiple cases.

11. For manual linking, caseworker will complete Identity (ID) Proofing prior to creating the link record on the External User page.

12. Primary Members can view all available information related to their case, including information recorded on their case pertaining to other household members, via their PSPMPR account. They can also report changes on behalf of their case members.

13. Case members can only view available information related to themselves on the case and can report changes for and about themselves.

14. A user or an External User is a person with an account on PSPMPR.

15. A Person is a registered participant of type Person in PREE.

16. New and modified notices documented within this FDD will be reviewed and approved as part of this deliverable. Once approved, these notices will be moved to the Notices and Forms FDD.

4 Business Processes

The Business Processes section contains high-level overview of business process related to the Online COC Citizen Portal FDD.

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4.1 Accessing PSPMPR as a Linked User Business Process

This process illustrates a high-level overview of the alternative ways users can gain access to their case as a linked user without having to submit an online application. As part of Release 1 (R1), an online application successfully processed will produce a linked account. This process will remain the same and is not documented in this process. As a linked user, one would be able to see supplemental information from their case, such as their coverage information, renewal status and form, and change forms.

Figure 1: Accessing PSPMPR as a Linked User
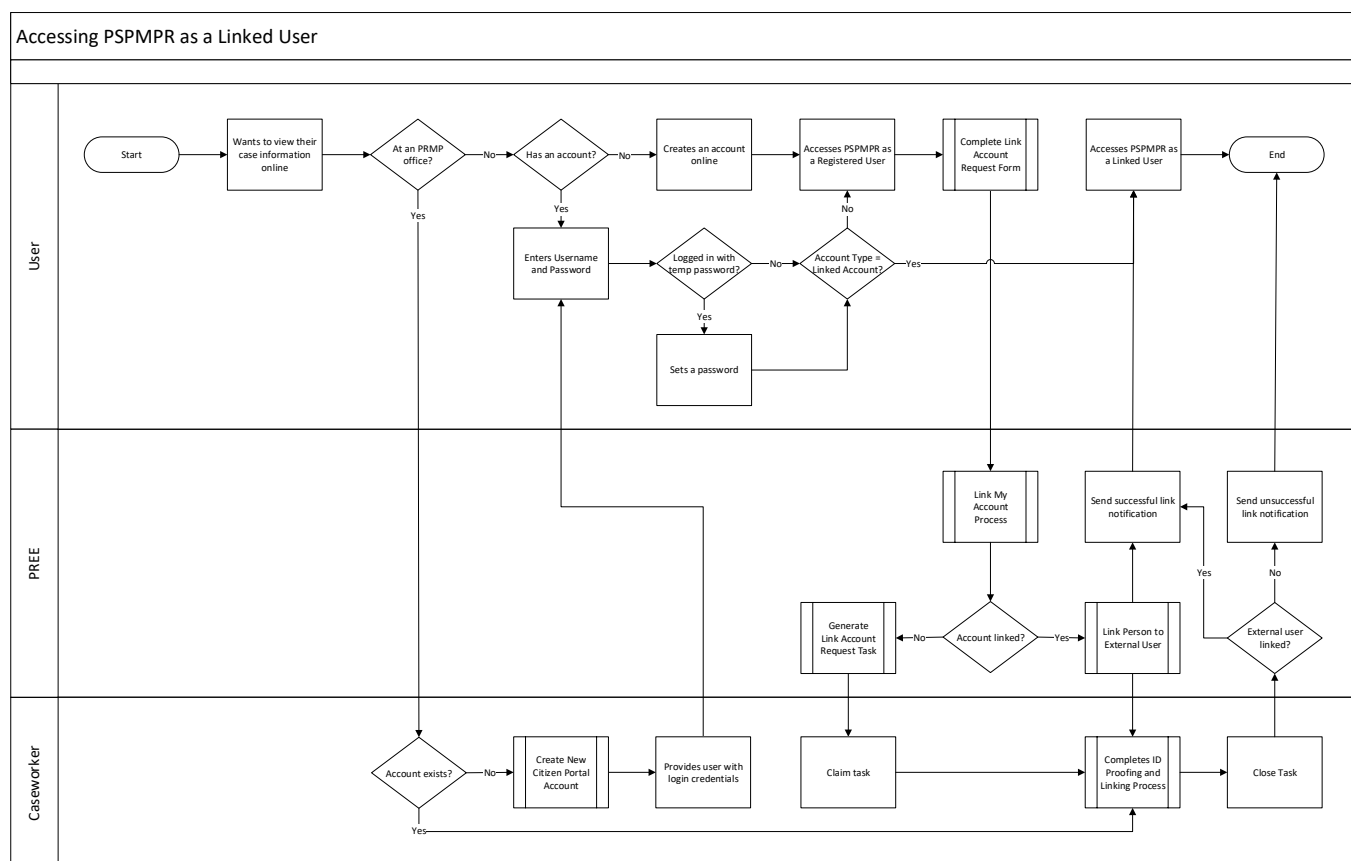
4.1.1 Detailed Description

User wants to view their case information online

User wants to view their case information online. There are two alternative ways a user can accomplish this, by submitting a 'Link my account' request form via PSPMPR or with the assistance of a caseworker.

User submits a 'Link my account' request form via PSPMPR

If the user is on the PSPMPR website, then they must complete the following steps to submit the 'Link my account' request form:

1. If user already has an account, login. Else, user must create an account to login.

2. Once logged in, the 'Link my account' card will appear on the dashboard. Note that the card will disappear once a request was submitted, or the account is linked using an alternative method.

3. Click on the 'Link my account' card and complete the form.

4. Once submitted, PREE will attempt to systematically link the account. If successful, then user will receive the 'Your Account Has Been Linked' notification to inform them that their request was successful. Else, a task will be generated for the caseworker to manually complete the process.

5. When a caseworker claims the task, they can complete the manual linking process as described in Citizen Portal FDD.

6. Once the caseworker has taken all the appropriate steps to attempt to complete the link request, they close the task. Note that when the task is closed, PREE will check if the External User was linked with a Person. If so, then the "Your Account Has Been Linked" notification will be sent. Else, the 'Unsuccessful Link My Account Request' notification will be sent.

User is being assisted by a caseworker

If the user is at an PRMP office, then a caseworker can assist them to obtain a linked account:

7. Caseworker will determine if the user already has an account. If not, a new account can be created from the Person profile page. Upon completion, caseworker will printout a notice with their username and temporary password.

8. Once the user account is created (by a caseworker or previously by the user), then the caseworker can proceed with the manual linking process as described in Citizen Portal FDD.

5 Screen Modifications

This section contains screenshots that are modified based on PREE requirements and/or Joint Application Design (JAD) discussions. There are two types of screenshots. The first is Modify – these are screens with modifications. Modifications are identified by a numbered red square that references the description in text below the screen. The second is "New" – these are new screens created based on specific requirements which have been requested. The new screens include numbers which reference the description in the supported documents.

5.1   Homepage

The 'Homepage' section pertains to the changes made to the links accessible from the PSPMPR homepage.

Figure 2: Citizen Portal Home Page Flow<CR189>
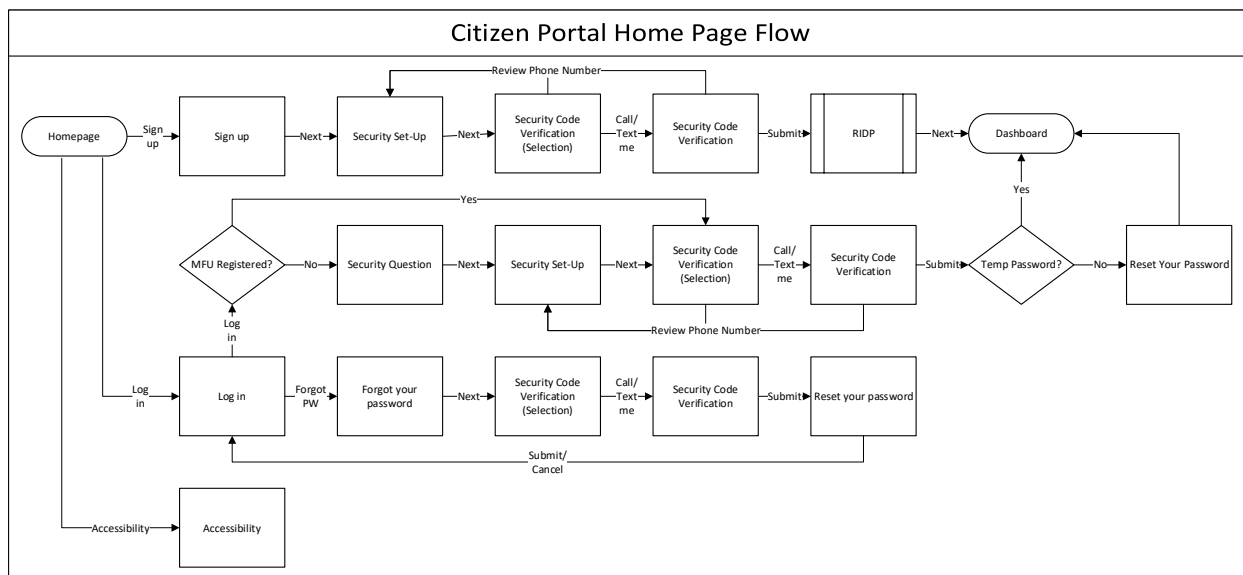
5.1.1   Sign up

The Sign up page will allow citizens to sign up for a new account with a unique email address and username. This page is being modified to remove the security questions. ~~and collect cell phone number~~.

5.1.1.1   Screenshot (Modify)

Figure 3: Sign up <CR189>

Sign up

To set up a new account we'll need you to enter the following details

First Name

Middle Name Optional

Last Name

Second Last Name Optional

Date of Birth:
DD/MM/YYYY

SSN:

☐ I do not have an SSN

Gender:

Address

Street 1:

Street 2:

City:

State:

Puerto Rico

Zip:

Email

Username

Password
Your password must be – at least 8 characters and contain; at least one numeric character; at least one special character (#$%()/&*_+=;); at least one upper case letter; and at least one lower case letter.

Show password

What language do you wish to be contacted in?

English

☐ I agree to the terms and conditions

Next

Already have an account? Login >

5.1.1.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Sign up

5.1.2   **<CR189> Reset** ~~Set~~ **Your Password**

In addition to displaying when user clicks on 'Forgot password?" link, the 'Reset ~~Set~~ Your Password' page will display when a user account was created by a caseworker and the user is logging in for the first time with their temporary password.

5.1.2.1   Screenshot

Figure 4: **Reset** ~~Set~~ **your password (Modify** ~~New~~**)**

5.1.2.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Reset ~~Set~~ your password

5.1.3   <CR189> Security Set-Up

The 'Security Set-Up' page will display when a user account first creates an account, the first-time logging in when MFA is implemented, or when requesting to update their phone number via the Settings Page. This page will collect the phone number that will be used to send the single-use code.

5.1.3.1   Screenshot

Figure 5: Security Set-Up (New)
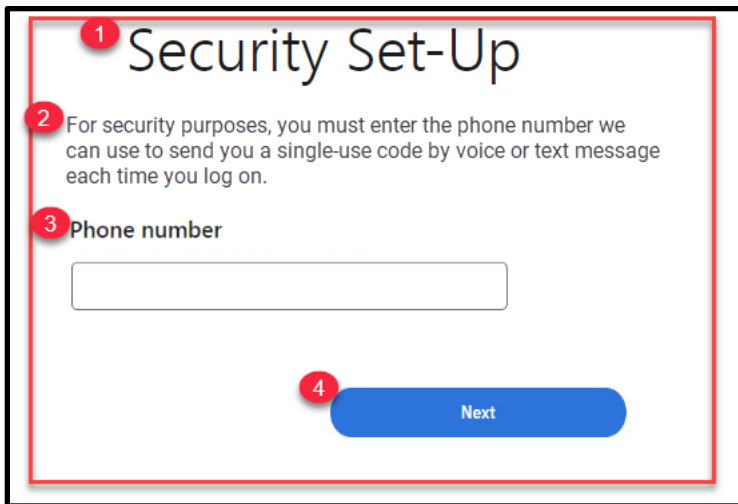
5.1.3.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Security Set-Up

5.1.4   <CR189> Security Code Verification (Selection)

The 'Security Code Verification (Selection)' page will display each time a user logs in or updates their phone. On this page, user will indicate how they want their single-use code to be sent, by voice or text.

5.1.4.1 Screenshot

Figure 6: Security Code Verification (Selection) (New)
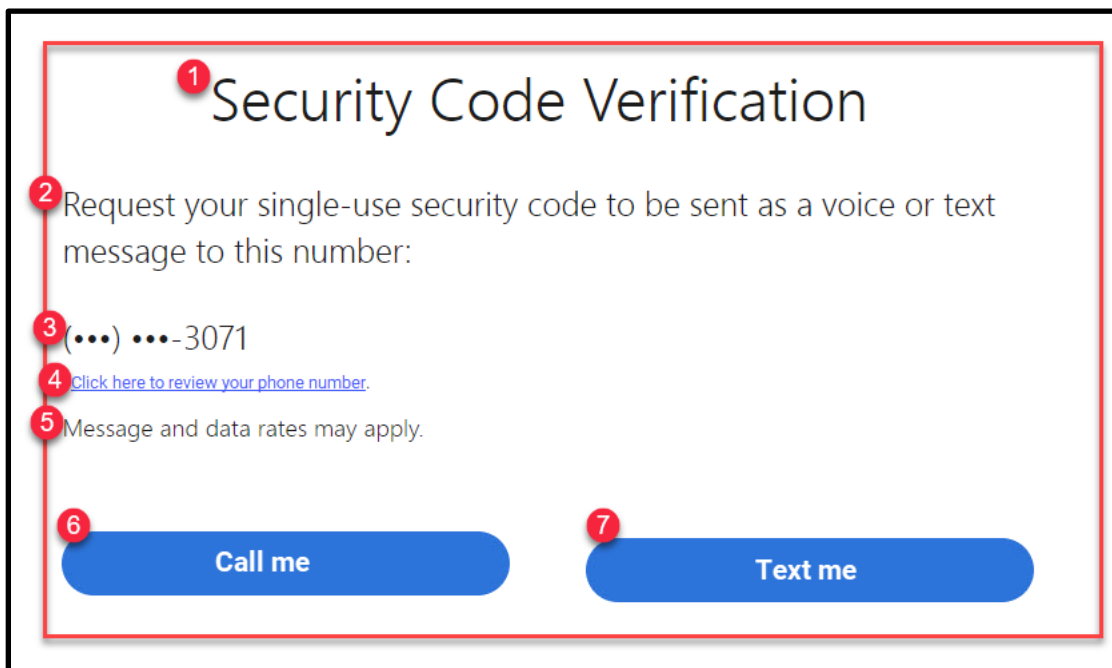
5.1.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Security Code Verfi - Selection

5.1.5 <CR189> Security Code Verification

The 'Security Code Verification' page will display each time a user logs in or updates their phone. On this page, user will enter the single-use code received by voice or text.

5.1.5.1 Screenshot

Figure 7: Security Code Verification (New)
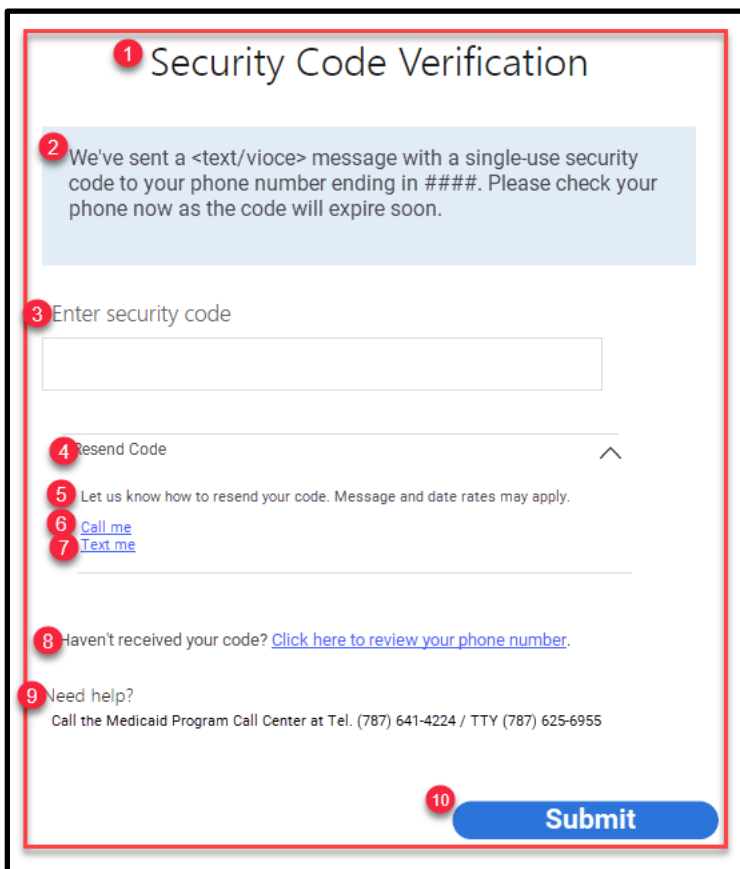
5.1.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Security Code Verification

5.1.6 <CR189> Security question

The 'Security question' page will no longer display after users completed the security set-up. For users with an account prior to the MFA release, they will be asked to answer a security question correctly to proceed with setting up their security phone number. Once the security set-up is complete, the user will no longer be asked to enter the answer to a security question.

5.1.6.1   Screenshot (Modified)

Figure 8: Security question

5.1.6.2   Description of Modifications and Additions

This page should only display after the Log in page when the following conditions are both true:

- Security questions with answers has been recorded for user
- User hasn't completed the security set-up

Once the security question is answered correctly, display the Security Set-Up page.

If one of these conditions are false, then skip this page and display the Security Code Verification page.

5.1.7   Footer

The footer of the Citizen Portal is being modified to add a link to the Accessibility page.

5.1.7.1   Screenshot (Modify)

Figure 9: Footer

5.1.7.2   Description of Modifications and Additions

Details located in:

Document	Tab Name

Online COC - General.xlsx	Footer

5.1.8 Accessibility

The Accessibility page will provide user with PRMP Accessibility information.

5.1.8.1 Screenshot (Modify)

Figure 10: Accessibility

5.1.8.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Accessibility

5.2 Your Account

The 'Your Account' section of the Citizen Portal provides citizens with access to certain features based on the user account status that consist of the following:

- Account Type: Registered vs Linked
- ID Proofing Status: Completed vs Not Completed
- User Role: Primary Member vs Case Member
- Identified Integrated Case (IC): <IC> vs Null

– Note that per Assumption #10, a Person should only be an active member on a single case. This case is referred as the Identified IC. See Defining External User Privilege Process (New) for more information on how User Role and Identified IC are established.

<CR189>

As a user, one will be able to complete an application, COC, and/or renewal. However, only one IEG script can be in progress at a time. Also Applications and COC will not be available during a renewal period.

The table below provides an overview of the different views based on the user account status. See Online COC - General.xlsx for the full list and display condition.

Table 3: User Account and Functionality Mapping

User Account Status		When a user account meets the following criteria:			
	Account Type: **ID Proofing:** **IC Identified:** **User Role:**	Linked Completed Yes Primary	Linked Completed Yes Member	Linked Completed No N/A	Registered N/A N/A N/A
	Then the following features are available to the user:				
Dashboard	**'Update your settings' link**	Visible	Visible	Visible	Visible
	Application alerts	Visible when there is an app in progress	Visible when an app in progress	Visible when an app in progress	Visible when an app in progress
	Renewal alerts	Visible when there is a renewal in progress	N/A	N/A	N/A
	'Apply for benefits' card	N/A	N/A	N/A	Visible
	'Link my account' card	N/A	N/A	N/A	Visible
	'View your benefits' card	Visible	Visible	Visible	N/A
	'View your profile' card	Visible	Visible	Visible	N/A
	Appointments	Visible	Visible	Visible	Visible
	Notifications	Visible	Visible	Visible	Visible

Benefits	**Coverage Information**	Visible with information of self and household members on identified IC	Visible with information of self only	Visible with information of self only	N/A
	Renewal Information	Visible for self and household members on identified IC	N/A	N/A	N/A
	Application Information	Visible for application submitted via account	Visible for application submitted via account	Visible for application submitted via account	Visible for application submitted via account
Documents	**Evidence Verification**	Visible with all evidence verification from the identified IC	Visible with all evidence verification from the identified IC where user is evidence owner	N/A	N/A
Profile	**Full COC**	Visible and prepopulated with all available data from the identified IC	Visible and prepopulated with all available data from the identified IC where user is evidence owner	N/A	N/A
	<CR189> Change in Income	~~Visible and prepopulated with all available data from the identified IC~~	~~Visible and prepopulated with all available data from the identified IC where user is evidence owner~~	~~N/A~~	~~N/A~~

	<CR189> Change in Address	Visible and prepopulated with all available data from the identified IC	N/A	N/A	N/A
	<CR189> Add/Remove HHM	Visible and prepopulated with all available data from the identified IC	N/A	N/A	N/A
Notices	**Notices**	Visible with Notices from IC and link Person	Visible with Notices from link Person	Visible with Notices from link Person	N/A
Apply for Benefits	**Application**	Prepopulated application	Blank application	Blank application	Blank application

Figure 11: Your Account Page Flow

Your Account Page Flow
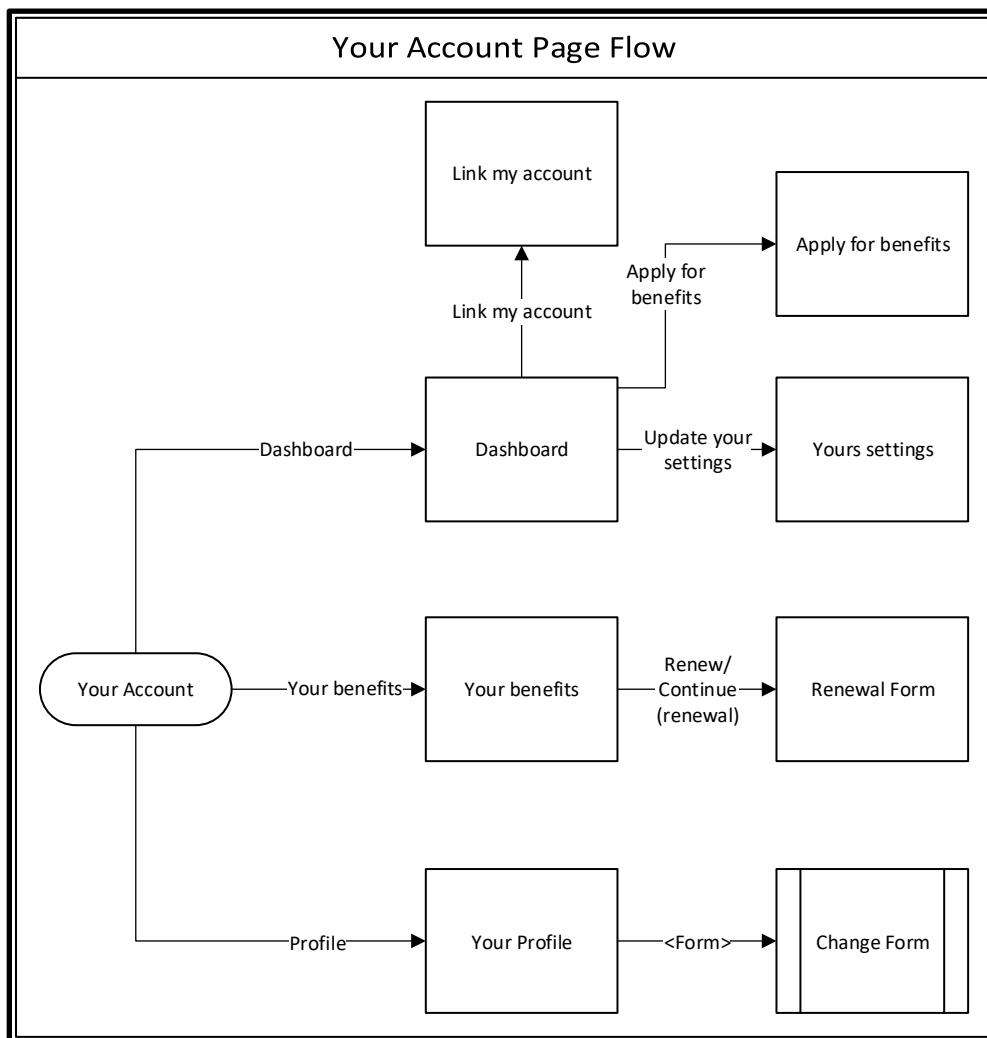
5.2.1 Dashboard

When a citizen logs in, they are greeted by their Dashboard with an overview of their account. From the Dashboard, users will be able to resume or delete a saved application, view their notifications and appointments, and go to the settings page. For registered accounts, a link to 'Apply for benefits' and 'Link my account' pages are displayed; for linked accounts, links to the 'Your benefits' and 'Your profile' pages are displayed on the Dashboard.

5.2.1.1   Screenshot (Modify)

Figure 12: Dashboard – Registered Account
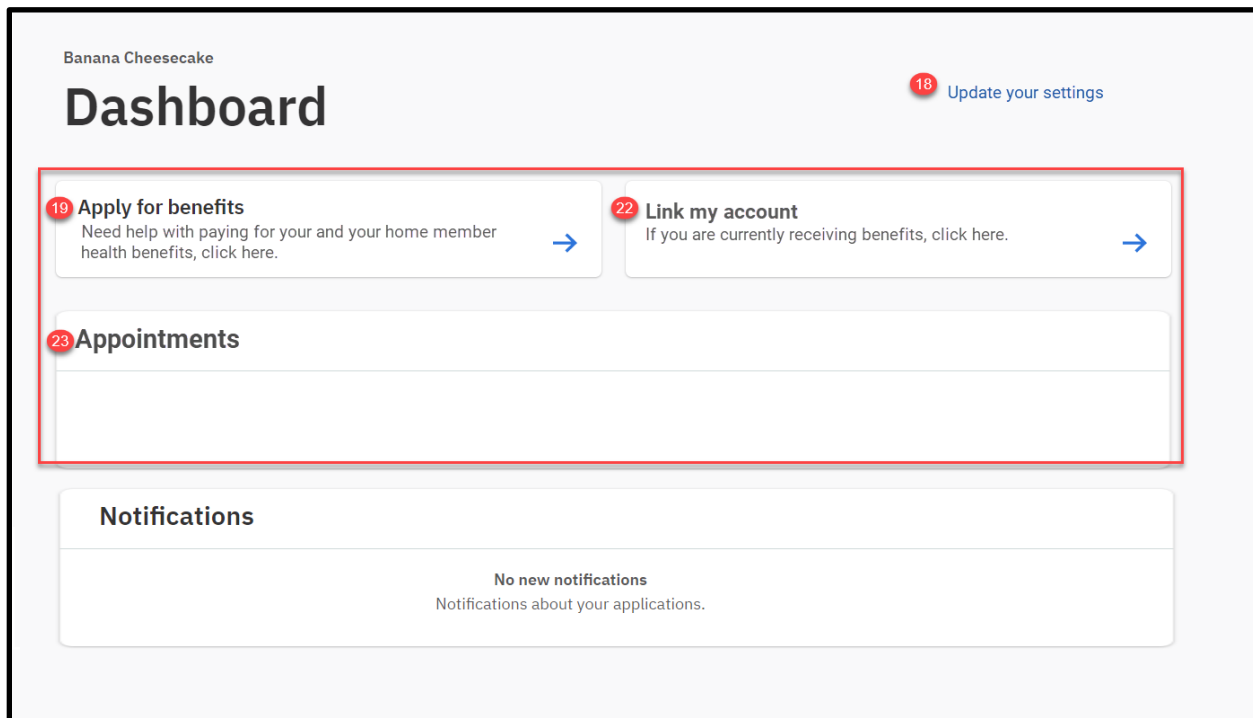
Figure 13: Dashboard – Linked Account
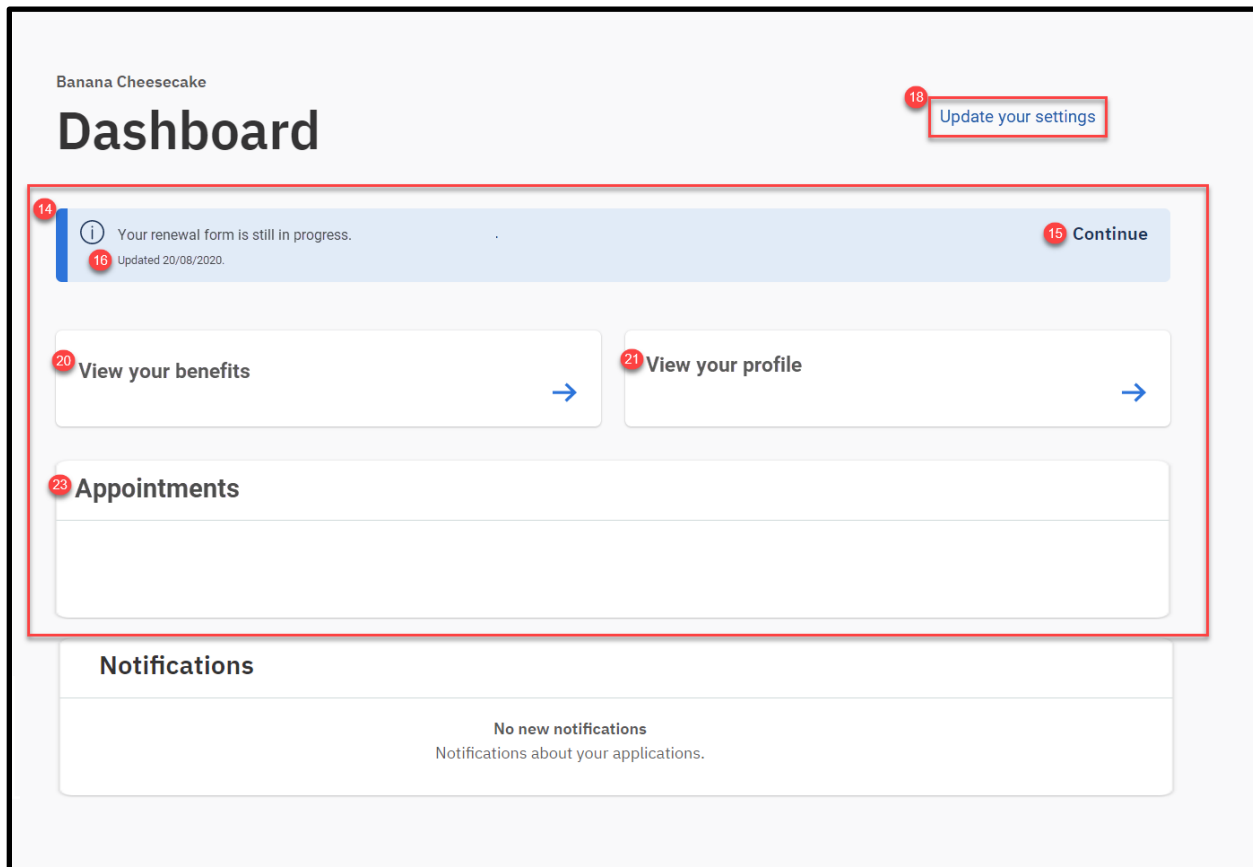
5.2.1.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Dashboard

5.2.2   Link My Account

The 'Link My Account' page provides the user the ability to submit a request to link their PSPMPR account with the benefit case. This page can be accessed from the Dashboard or Your Benefits page. If a user chooses to upload a photo identification, then the caseworker can view this document on the External User Attachment page.

5.2.2.1   Screenshot

Figure 14: Link my account

5.2.2.2   Description of Modifications and Additions

Details located in:

Document	Tab Name

Online COC - General.xlsx	Link My Account

5.2.3   Your Benefits

The 'Your benefits' page provides the user the ability to view status of application submitted via their account and their current coverage information. If the user is the primary member on the case, then they can also view their household members' coverage and renewal information.

The primary member will be able to fill out and submit an online Renewal Form if there is a household member within the recert period. The following table shows which renewal status to display based on multiple factors. Household members NOT within their recert period will NOT be listed in the Renewal Status card.

Table 4: Renewal Status

Citizen Portal Renewal Status	Recert Record Status	Online Renewal Form	Within Recert Period
Not Completed	- None - In Progress - Manual Recertification	Not submitted	Yes
Pending Decision	- None - In Progress - Manual Recertification	Submitted	Yes
Pending Verifications	Pending Verifications	Any	Yes
Completed	- Completed/Eligible - Completed by ExParte/Eligible - Completed/Ineligible	Any	Yes
Past Due	- None - In Progress - Manual Recertification	Any	Yes and Adequate Notice Period

5.2.3.1   Screenshot

Figure 15: Your benefits – Registered Account without applications

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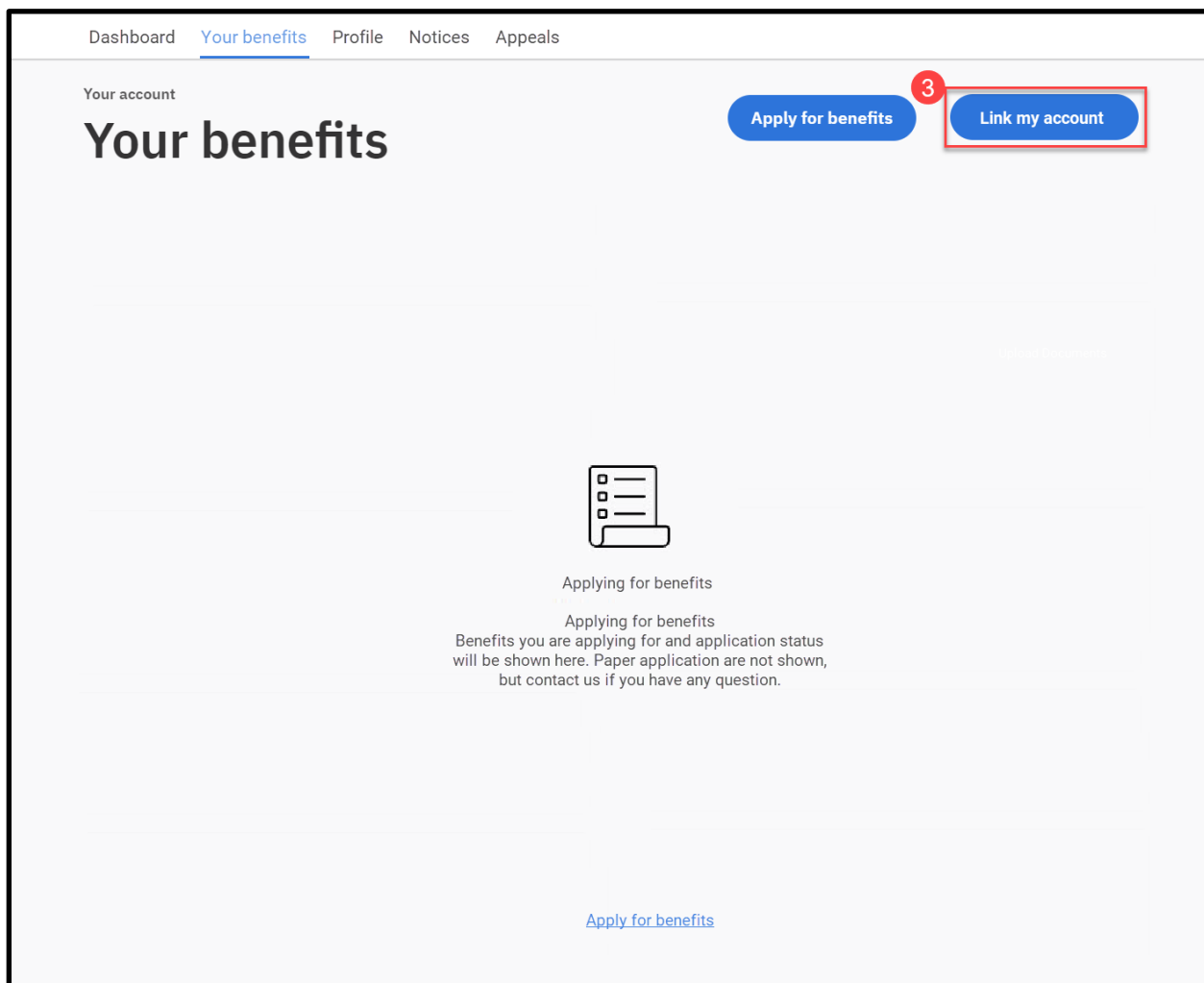
Figure 16: Your benefits – Linked Account with coverage/applications

5.2.3.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-General.xlsx	Your benefits

5.2.4   Your Profile

The 'Your Profile' page allows the user to report a single change of circumstance or multiple change of circumstances. Some of the changes the user can report are Change in Address, Add and Remove a household Member, Income changes etc.

5.2.4.1 Screenshot (New)

Figure 17: Your Profile <CR189>

Your account

Profile: Strawberry Cheesecake

Keep your profile up to date and tell us about any changes so that we can review to make sure you're getting the right help.

(17) Tell us if anything has changed

(18) **Change of Circumstances**

(19) Here you can record any type of changes, including: address, household members and their personal infomration, income, pregnancy, disability, health insurance, benefits, resources and expenses. →

5.2.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-COC.xlsx	Your Profile

5.2.5 Your Settings

The 'Your settings' page in the Citizen Portal provides citizens with the ability to modify their email address, cell phone number, notification preference and paperless notice settings. It is accessed by the 'Update your settings' link on the dashboard. <Pending Decision EE-DL00271>

5.2.5.1   Screenshot (New)

Figure 18: Your settings (collapsed) <CR189>
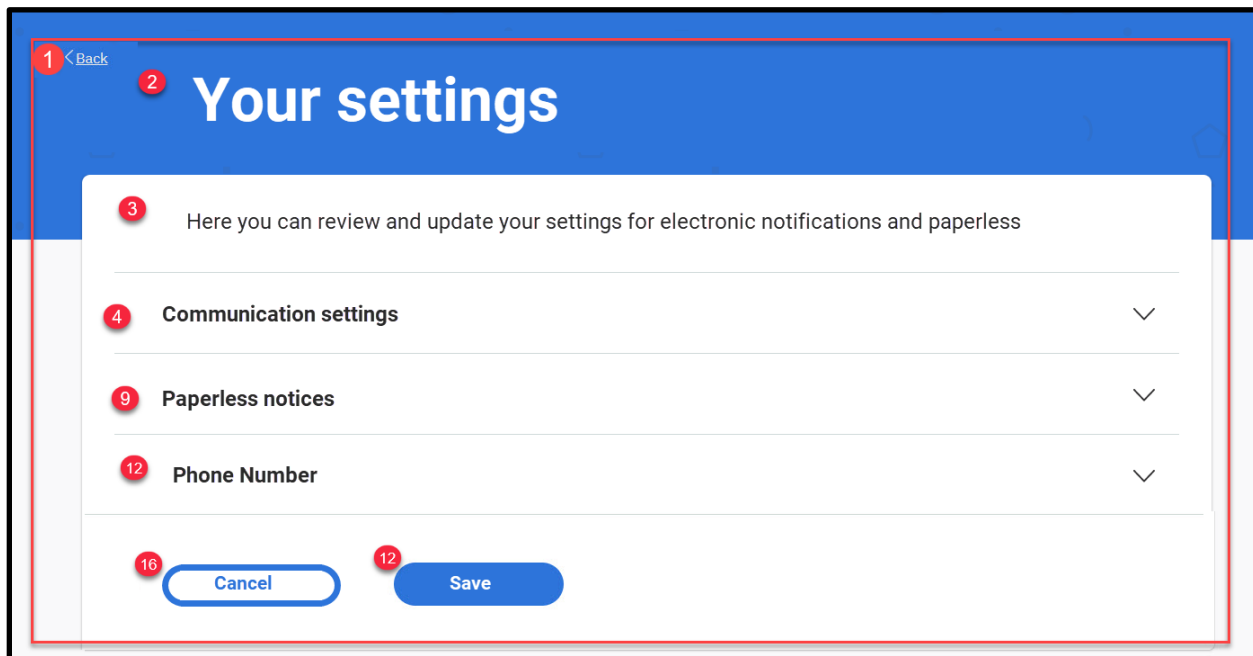
Figure 19: Your settings (expanded) <CR189>

5.2.5.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Your settings

5.2.6   <CR189> Your Documents

The 'Your Documents' page displays a list of items that requires verification, documents sent for verification, and accepted verification. When the person is a Primary Member, they will be able to view all unverified items on the case. When the person is a Case Member, they will only be able to view their unverified items.

5.2.6.1   Screenshot

Figure 20: Your Documents (Modify)
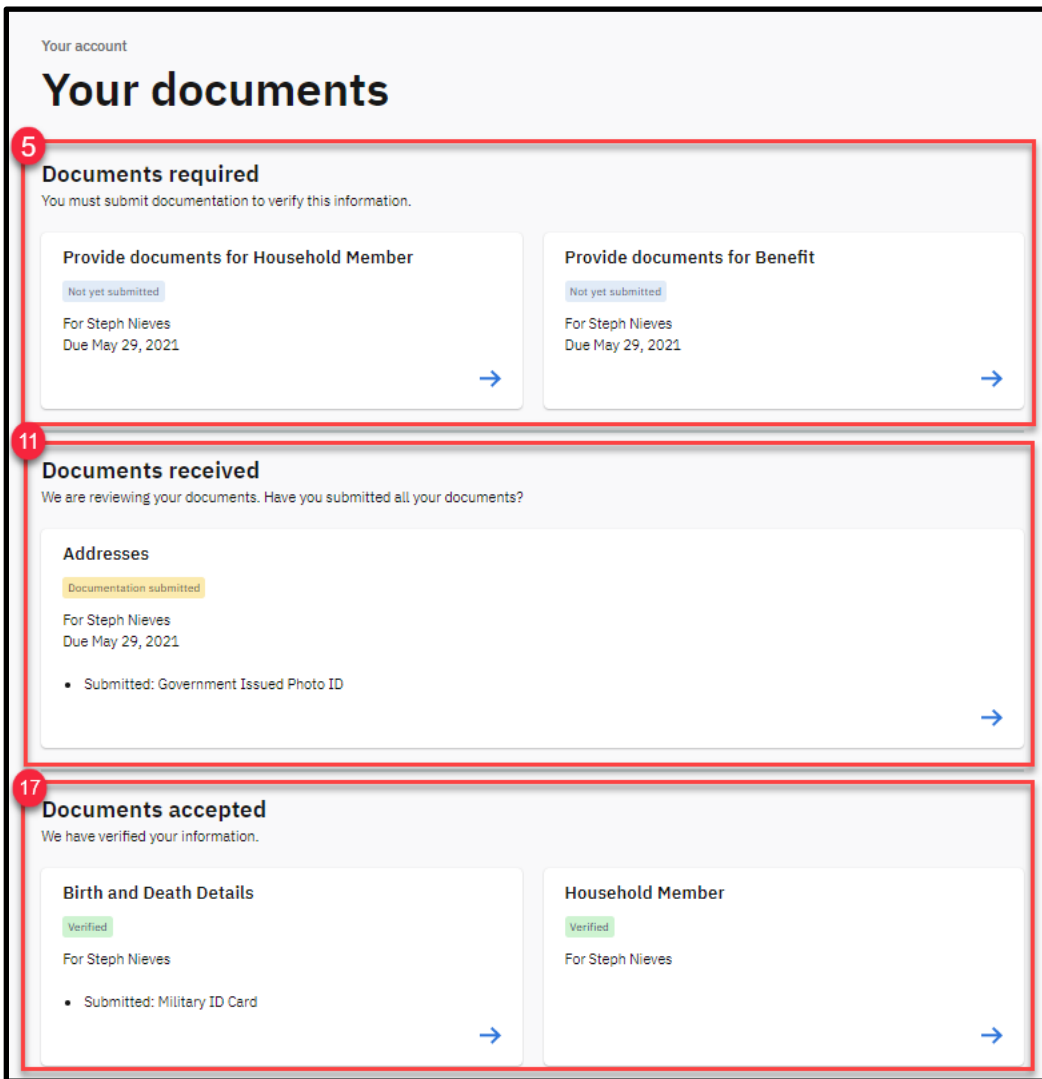
5.2.6.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Your Documents

5.2.7 <CR189> Notices

The 'Notices' page displays sent notices. Primary Member will be able to view all notices listed in the IC and on their Person page. Case Member will be able to view all notices listed in IC where member is the correspondent and on their Person page.

5.2.7.1 Screenshot

Figure 21: Notices – No notices (Modify)

Figure 22: Notices – with notices (Modify)
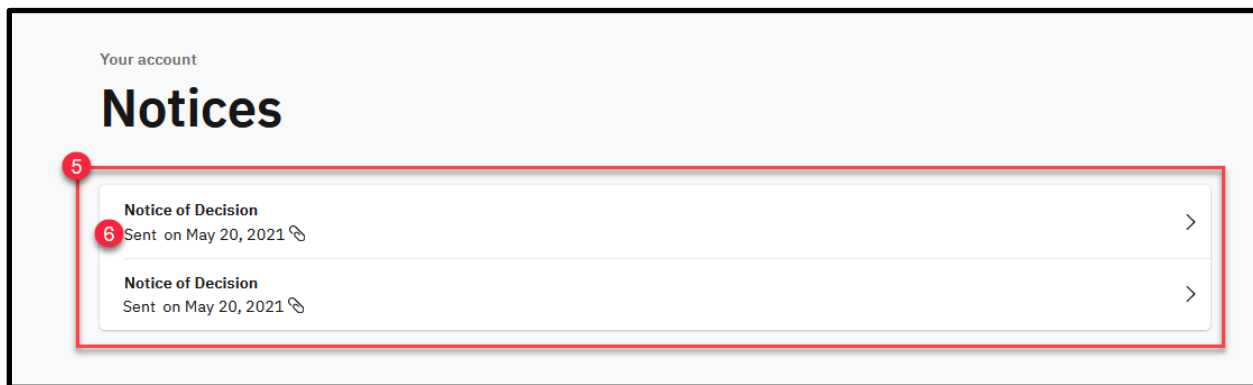
Figure 23: Notices – Viewing a Notice (Modify)
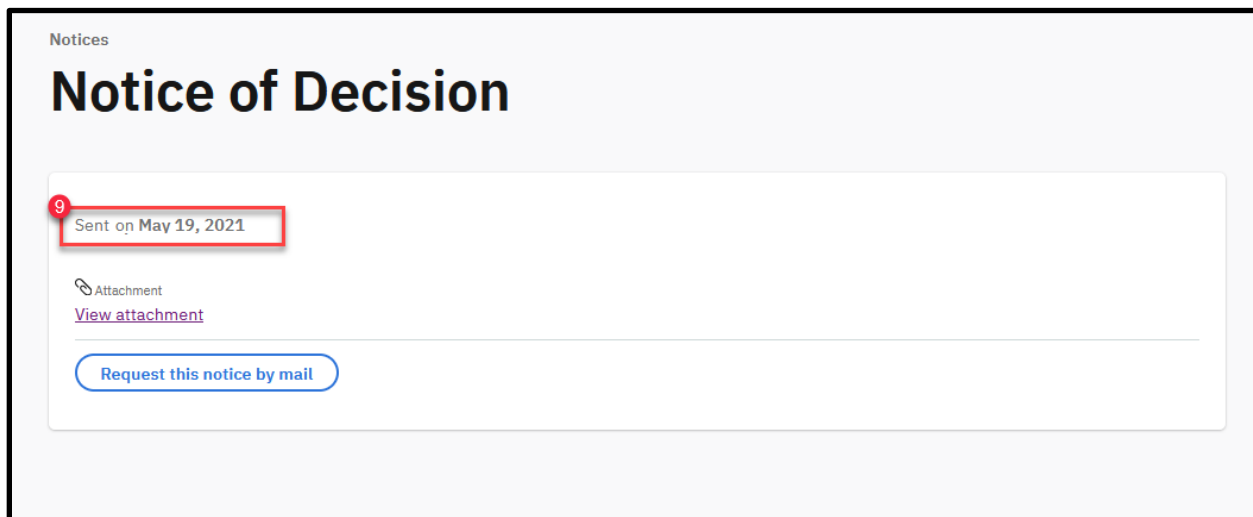
5.2.7.2 Description of Modifications and Additions

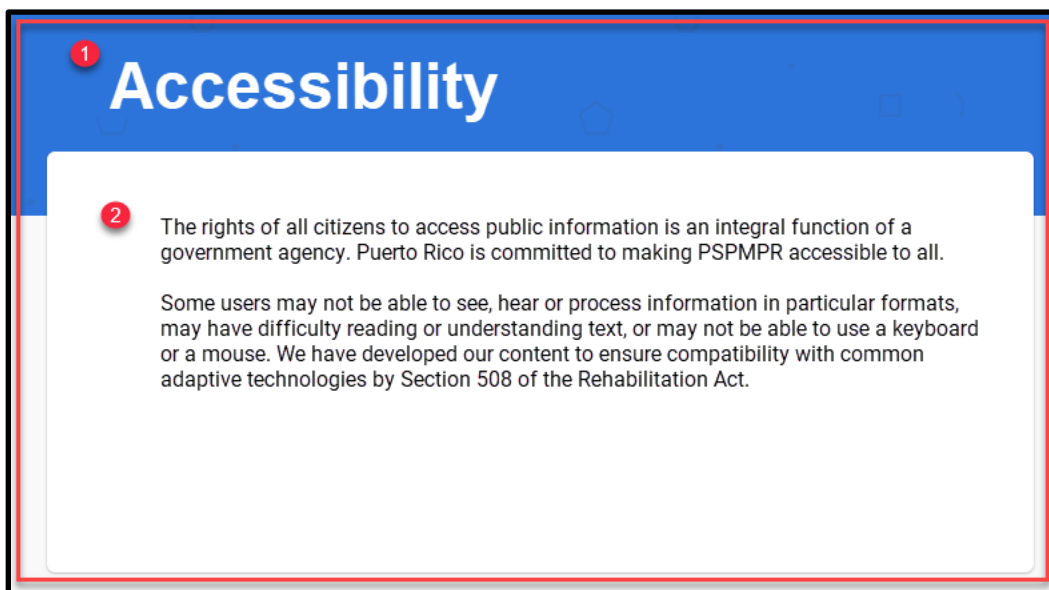Details located in:

Document	Tab Name
Online COC - General.xlsx	Notices

5.3 Retroactive Application

With the implementation of the Online COC FDD, PSPMPR users will be able to apply online for Retroactive benefits. The 'Include Benefits' page was added back to allow the user to indicate that a retroactive application should be included with their normal application for benefits. In this case, to facilitate income calculations for the retroactive period, income screens are modified to include 3 additional months of income for a total of 6 months prior income, for situations where the income varies from month to month. Retroactive coverage which exceeds 3 months prior to the start of normal coverage is not supported by the Citizen Portal. Caseworkers will be notified by a task when an applicant has recorded a medical expense with a start date greater than 3 months ago to ensure that the case contains all the necessary information to properly evaluate the applicant for retroactive benefits beyond the prior 3 months.

See the Citizen Portal FDD for more information about the blank online application and Prepopulated Form for more information about the prepopulated online application.

5.3.1 Apply for benefits

The 'Apply for benefits' page is displayed when a user chooses to apply for benefits. The user can now apply for retroactive coverage online. Modification to this screen include text providing brief overview of retroactive coverage program.

5.3.1.1 Screenshot (Modify)

Figure 24: Apply for benefits
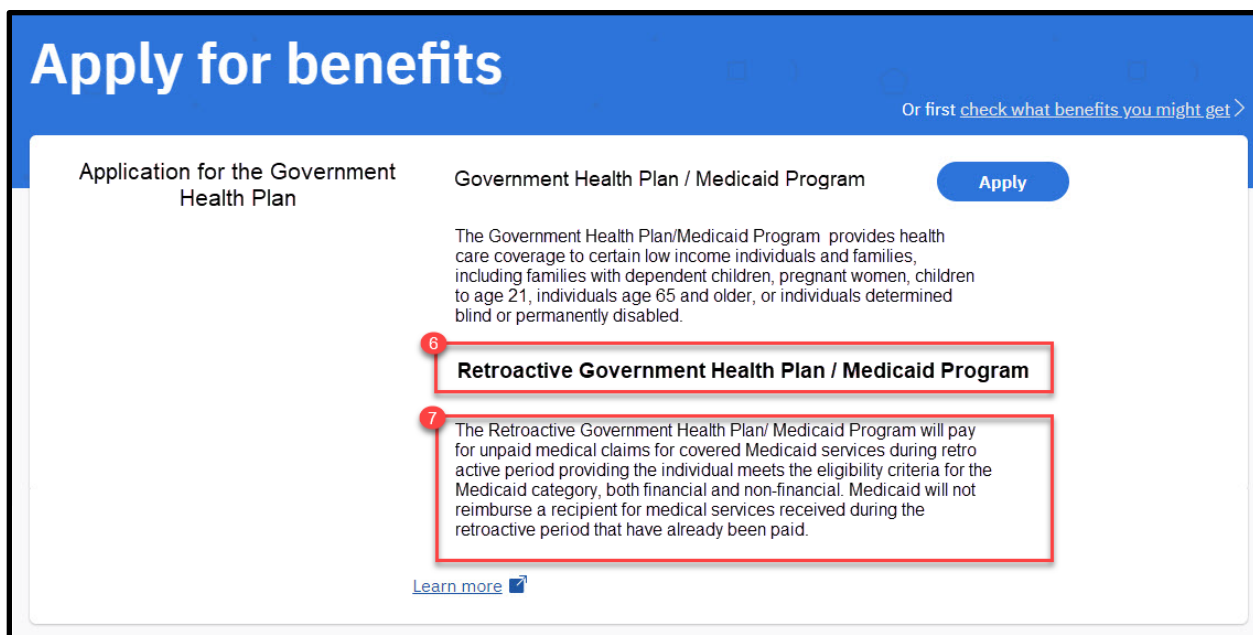
5.3.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Apply for benefits

5.3.2 Include Benefits

The 'Include Benefits' page is displayed when the user applies for benefits. This page allows the user to apply for Retroactive coverage. The page is displayed with the Government Health Plan preselected and provides the user the option to select Retroactive Government Health Plan. Modifications to the OOTB page include removing other OOTB programs not included for PREE.

5.3.2.1 Screenshot (New)

Figure 25: Include Benefits

5.3.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Include Benefits

5.3.3   Employment

The 'Employment' page is displayed when the user states that he/she is receiving employment income. If the user has selected to apply for retroactive coverage, then employment income for three additional previous months is gathered. Modification to the OOTB screen for applications with retroactive coverage include conditionally asking if the user received a different amount in the past 6 months and if yes, the corresponding income amounts.

5.3.3.1   Screenshot (Modify)

Figure 26: Employment – Application with Retro Coverage

10 Was Strawberry paid a different amount in the last 6 months?

Yes ⬍

How much was Strawberry paid in <Previous Month>, including tips and commissions? *Optional*

$ _____

How much was Strawberry paid in <2nd Previous Month>, including tips and commissions? *Optional*

$ _____

How much was Strawberry paid in <3rd Previous Month>, including tips and commissions? *Optional*

$ _____

14 How much was Strawberry paid in <4th Previous Month>, including tips and commissions? *Optional*

$ _____

15 How much was Strawberry paid in <5th Previous Month>, including tips and commissions? *Optional*

$ _____

16 How much was Strawberry paid in <6th Previous Month>, including tips and commissions? *Optional*

$ _____

Does Stawberry receive any tips or commissions? *Optional*

Yes ⬍

If Stawberry is no longer employed here, when was his last day of work? *Optional*

_____

Please enter Stawberry's tips and commissions details below:
What is the average amount Stawberry receives?

$ _____

How often does Stawberry receive tips and commissions?

--Please Select-- ⬍

Does Stawberry have any other job?

--Please Select-- ⬍

Next

5.3.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Employment

5.3.4   Self-Employment

The 'Self-Employment' page is displayed when the user states that he/she is receiving self-employment income. If the user has selected to apply for retroactive coverage, then self-employment income for three additional previous months is gathered. Modification to the OOTB screen for applications with retroactive coverage include conditionally asking if the user received a different amount in the past 6 months and if yes, the corresponding income amounts.

5.3.4.1   Screenshot (Modify)

Figure 27: Self-Employment – Application with Retro Coverage

5.3.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Self-Employment

5.3.5 Other Income

The 'Other Income' page is displayed when the user states that he/she is receiving other income. If the user has selected to apply for retroactive coverage, then other income for three additional previous months is gathered. Modification to the OOTB screen for applications with retroactive coverage include conditionally asking if the user received a different amount in the past 6 months and if yes, the corresponding income amounts.

5.3.5.1   Screenshot (Modify)

Figure 28: Other Income – Application with Retro Coverage

5.3.5.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Other Income

5.3.6   Trust Income

The 'Trust Income' page is displayed when the user states that he/she is receiving trust income. If the user has selected to apply for retroactive coverage, then trust income for three additional previous months is gathered. Modification to the OOTB screen for applications with retroactive coverage include conditionally asking if the user received a different amount in the past 6 months and if yes, the corresponding income amounts.

5.3.6.1   Screenshot (Modify)

Figure 29: Trust Income – Application with Retro Coverage

Grantor Details

Is the Grantor of the trust an individual or an organization?

--Please Select--

Is the grantor of the trust a member of the home?

--Please Select--

Trust Income Details

What type of trust income type does Strawberry have?

--Please Select--

How much does Strawberry receive?

$

How often does Strawberry receive this income?

--Please Select--

When did Strawberry start receiving this income?
DD/MM/YYYY

18 Did Strawberry receive a different amount in the last 6 months?

Yes

How much did Strawberry receive in <Previous Month>? Optional

$

How much did Strawberry receive in <2nd Previous Month>? Optional

$

How much did Strawberry receive in <3rd Previous Month>? Optional

$

22 How much did Strawberry receive in <4th Previous Month Optional

$

5.3.6.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC – App COC & Renewal.xlsx	Trust Income

5.3.7   Annuity Income

The 'Annuity Income' page is displayed when the user states that he/she is receiving annuity income. If the user has selected to apply for retroactive coverage, then annuity income for three additional previous months is gathered. Modification to the OOTB screen for applications with retroactive coverage include conditionally asking if the user received a different amount in the past 6 months and if yes, the corresponding income amounts.

5.3.7.1   Screenshot (New)

Figure 30: Annuity Income – Application with Retro Coverage

Institution Details

What is the name of the institution with whom the annuity is held?

--Please Select--

What is the Institution's address? If address is unknown, type 'Unknown' in Street 1.

Street 1

Street 2 Optional

City

State

--Please Select--

Zip

Annuity Income Details

How much does Strawberry receive?

$

How often does Strawberry receive this income?

--Please Select--

When did Strawberry start receiving this income?
DD/MM/YYYY

Did Strawberry receive a different amount in the last 6 months?

Yes

How much did Strawberry receive in <Previous Month>? Optional

$

How much did Strawberry receive in <2nd Previous Month>? Optional

$

5.3.7.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Annuity Income

5.4 Prepopulated Forms

With the implementation of the Online COC FDD, those with the privilege of obtaining prepopulated online forms, as described in Table 3: User Account and Functionality Mapping, will be able to review and make the necessary updates to those forms. The following forms are available prepopulated:

- Prepopulated Application – allows users to apply online for regular and retroactive benefits.

- Renewal – allows users to complete an online renewal form for benefit extension.

- Change of Circumstances – allows users to submit multiple type of changes.

- ~~Change Address – allows users to report changes to the household members' residential addresses and the case mailing address.~~

- ~~Change Income – allows user to report changes related to income.~~

- ~~Add and Remove Household Member– allows user to report changes related to their household unit.~~

These forms will be prepopulated with data from evidences that meet the Prepopulating Criteria, as defined below:

Table 5: Prepopulating Criteria

Field	Criteria	Comments
Participant	Has a Household Member evidence on the case without an end date	
End Date	Null OR a future end date	Except for Pregnancy evidence. Pregnancy evidence will be prepopulated if the due date OR end date is within the last 3 months.
Status	Active or In-Edit	If an evidence has a version that is Active and a version that is In-Edit, then display the In-Edit version.

When these forms are submitted, any changes made will have an effective date as described below:

Table 6: Effective Date Rules for Online Changes

Condition	Effective Date

Form Type	Start Date updated?	
Any	Yes	Start Date
Application	No	1st of month of the application date
Not Application	No	Date form was submitted

In addition, when a user adds a new household member to their case, if the household member was previously a member on the case, then a Household Member Evidence will already exist with an end date. When this is the case, the end date should be removed using the effecting dating logic defined above.

When a form is prepopulated, the following fields are displayed but cannot be modified: names, social security numbers (SSN) and birth dates of both primary and household members. SSN are masked to only display the last 4 digits.

This section contains details pertaining to the Application, Renewal and Change of Circumstances forms. These three forms share many of the same pages and similar page flow.

The page flow for these forms are as follows:

- Overview pages – the overview pages that provide information about the selected form.

- Summary pages – the summary pages provide a summary of the information PREE has for that person or case. From these pages, users can Review, Remove, or Add.

  - Change ~~Review~~ – when user clicks on Change ~~Review~~ from any prepopulated form, this will provide the same functionality as the Change button on a blank application summary page. User will be navigated to a prepopulated detail page of the record. On this page, user can review the information and make the necessary changes.
  - Remove – when user clicks on Remove from any prepopulated form, they will be prompted to confirm the removal.
  - Add – when user clicks on Add from any prepopulated form, this will provide the same functionality as the Add button on a blank

application summary page. User will be navigated to a blank detail page of the record. If the User Role is Primary, then list each member on the case. If the User Role is Member, then list only the user.

- Submission pages – the submission pages provide a signature page and submission confirmation page.

Below is an overview of the page flow. Please review the Page Mapping tab within the 'Online COC - App, COC & Renewal' spreadsheet for the mapping between each page to the forms.

<CR189> Figure 31: Prepopulated Application, COC, & Renewal Form Page Flow
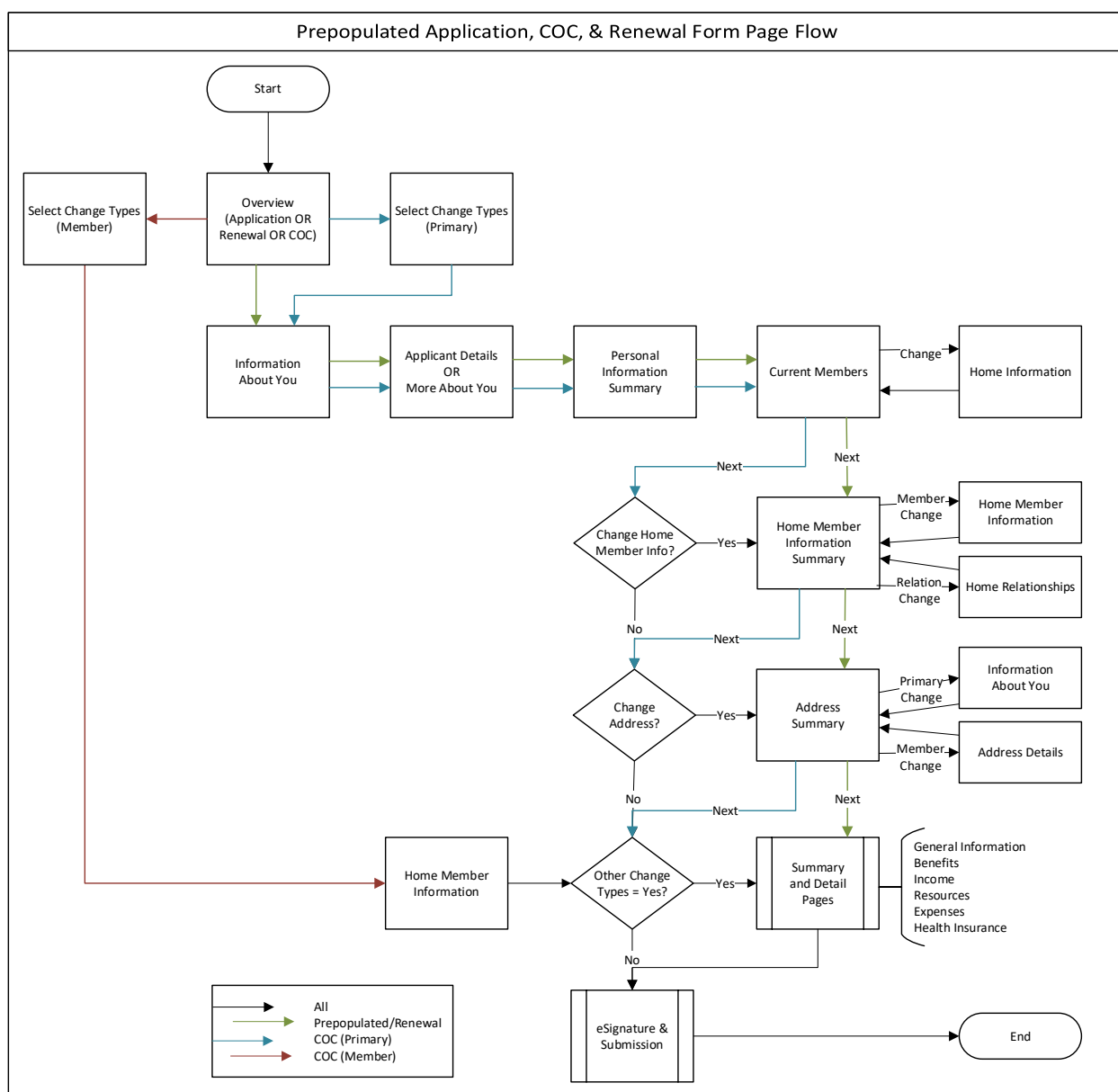
~~**<CR189> Figure 32: Prepopulated Application/Renewal Form Page Flow**~~

~~**<CR189> Figure 33: Change of Circumstances Page Flow – Primary Member**~~

Figure 34: Change of Circumstances Page Flow –Member

Change of Circumstance Page Flow – Member
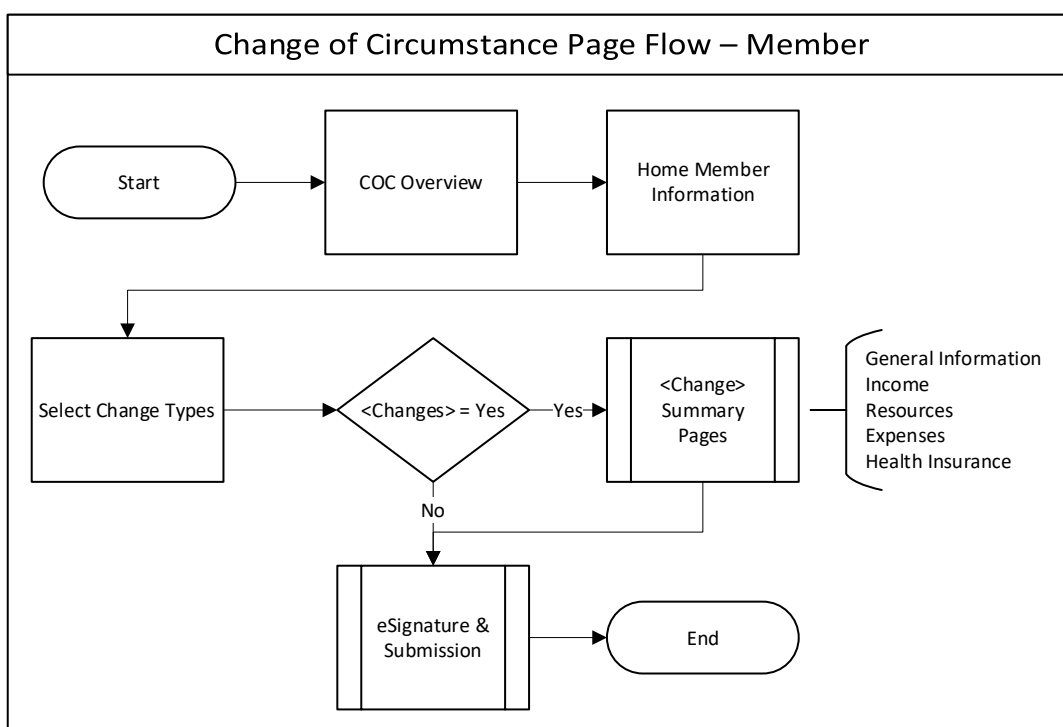
5.4.1 Application Overview

The 'Application Overview' page summarizes the application process and informs the user of the steps required to complete an application for the government health plan. It includes examples of the documentation which may be required and describes the decision. After reviewing this page, the user can press the 'Start application' button to begin preparing their application. When a prepopulated application is being presented, additional text in the 'Apply' section has been added to describe the effect of this change to the user.

5.4.1.1　　Screenshot (Modify)

Figure 35: Application Overview - Prepopulated
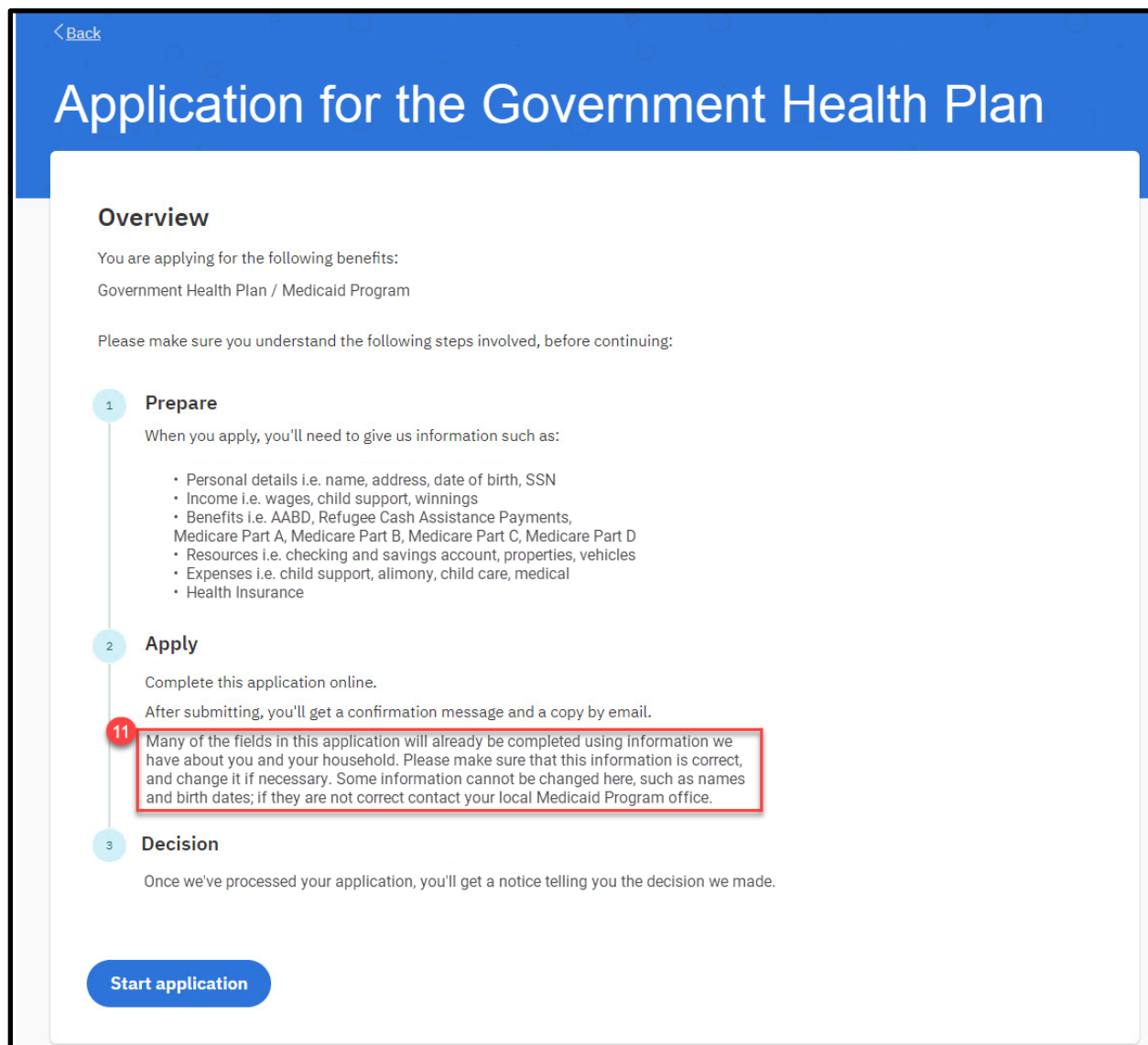
5.4.1.2　　Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Application Overview

5.4.2   COC Overview

The 'COC Overview' page summarizes the change of circumstance process and informs the user of the steps required to complete the report of a change. It includes examples of the documentation which may be required and describes the decision. After reviewing this page, the user can press the 'Start' button to begin their change of circumstance report.

5.4.2.1   Screenshot (New)

Figure 36: COC Overview
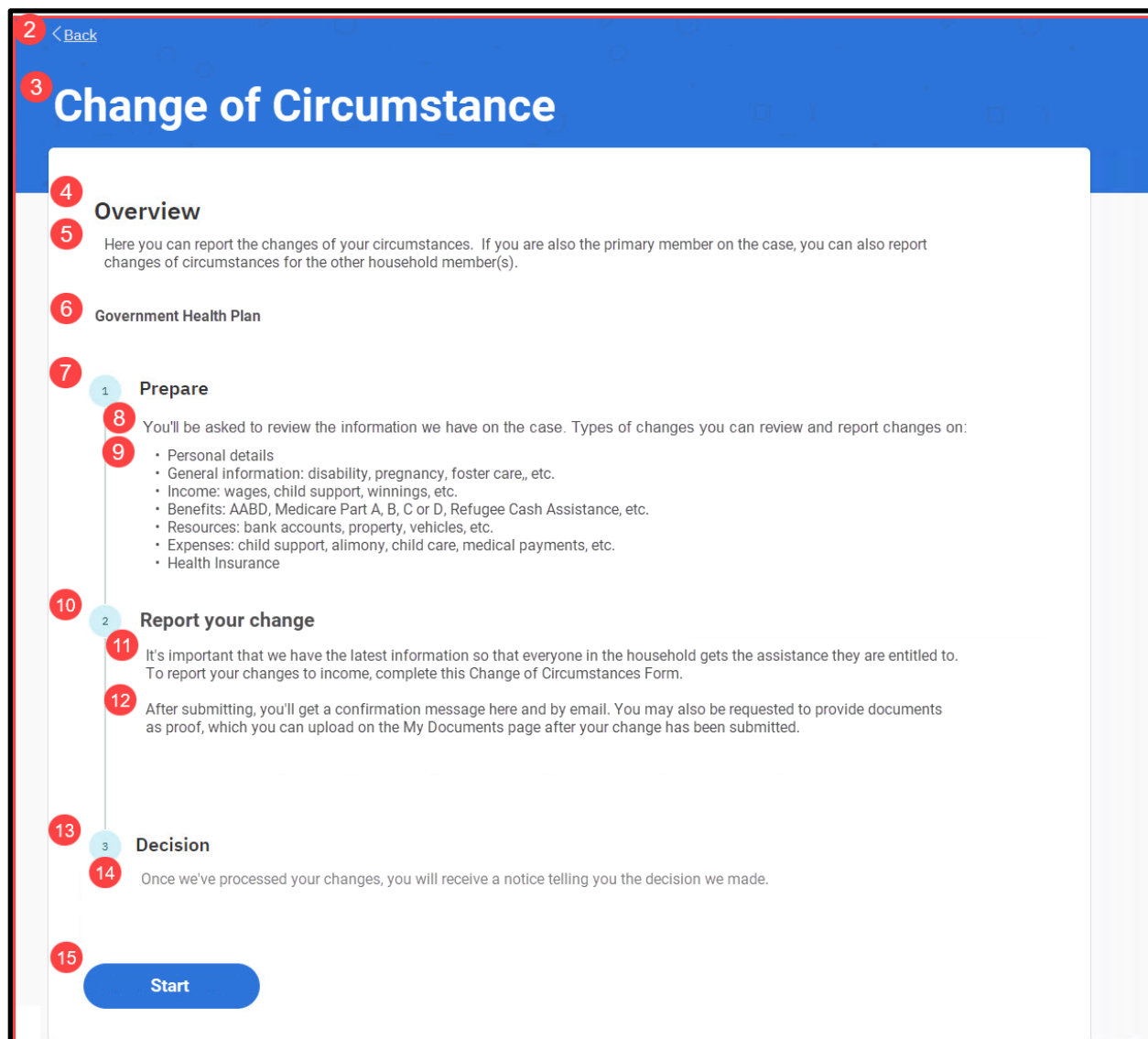
5.4.2.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	COC Overview

5.4.3 Renewal Overview

The 'Renewal Overview' page summarizes the renewal process and informs the user of the steps required to complete the renewal form. It includes examples of the documentation which may be required and describes the decision. After reviewing this page, the user can press the 'Start Renewal' button to begin their renewal form.

5.4.3.1 Screenshot (New)

Figure 37: Renewal Overview
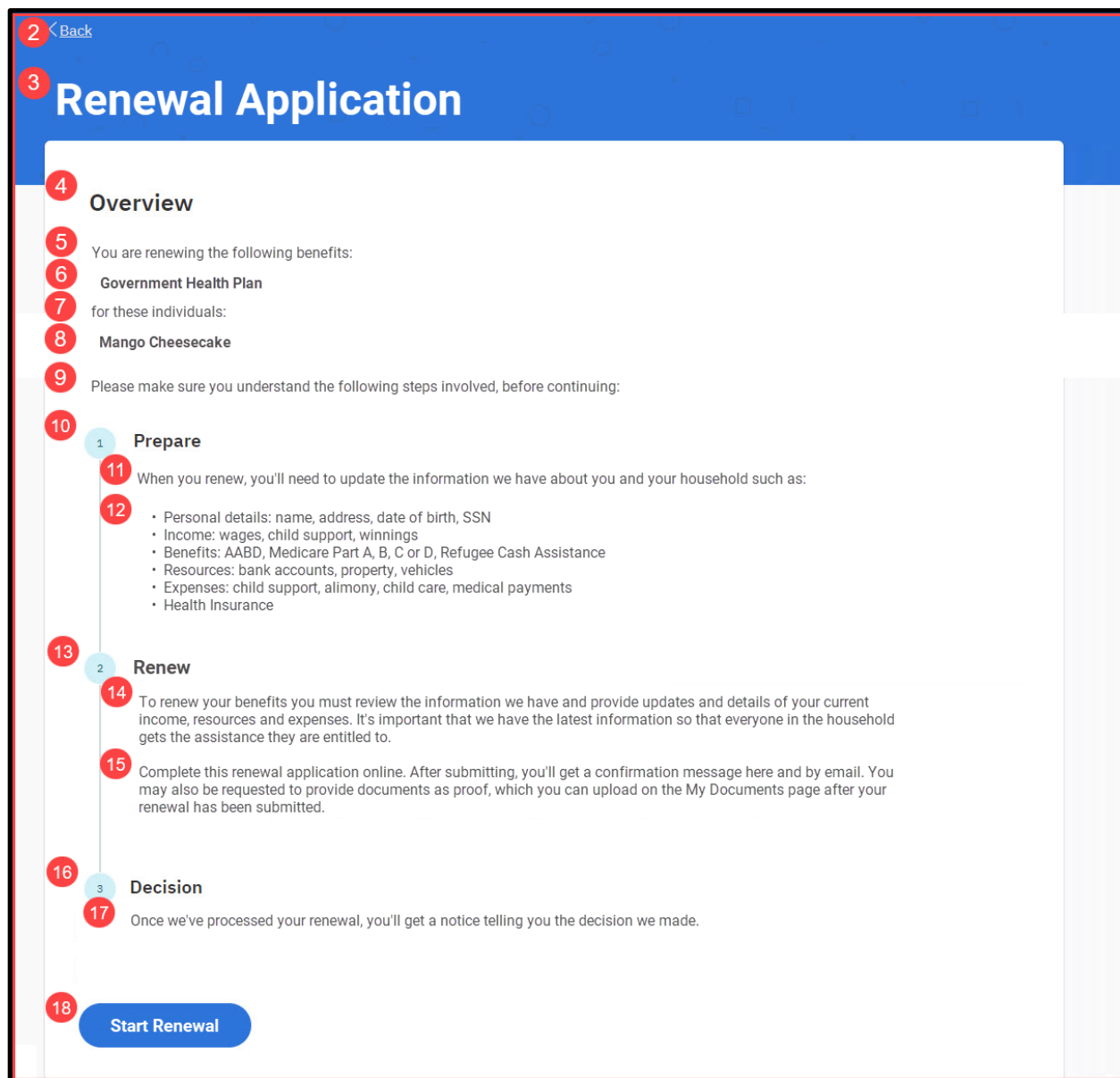
5.4.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name

Online COC - App COC & Renewal.xlsx	Renewal Overview

5.4.4   Select Change Types

The 'Select Change Types' page allows the user to select one or more types of information for which to report changes. For each type chosen, the user will be asked to review current information and update, add, or remove it as needed. Addresses and Household Members are only included for primary members on the case the user is linked to.

5.4.4.1   Screenshot (New)

Figure 38: Select Change Types <CR189>

Primary Member

Select Change Types - Case Member

Select Change Types

Please indicate the types of information you would like to change. You may select as many as you like. If you aren't sure and would like to review the information we have about you, select 'Yes'. If you are the primary member on the case, you can view and modify information about the other household members.

General Information

General Information includes blindness, disability, pregnancy, foster care, adoptions, and absent parents.

Do you have a change in general information to report?

| Yes | ⬍ |

Benefits

Current benefit information includes Aid to Aged, Blind and Disabled, Medical Assistance, Medicare and Refugee Cash Assistance Payments to members of your household.

Do you have a change in current benefit information to report?

| Yes | ⬍ |

Income

Income includes income from employment, self employment, trusts, annuities, or other sources of income like rental income, pensions, alimony and child support.

Do you have a change in income to report?

| Yes | ⬍ |

Resources

Resources include any property of value such as a home or a vehicle. It also includes things of value such as a burial plan, life insurance, or a liquid asset like a savings bond, bank account or cash.

Do you have a change in resources to report?

| Yes | ⬍ |

Expenses

Expenses include any payments made for medical bills, child support, dependent care, alimony, and student loans.

Do you have a change in expenses to report?

| Yes | ⬍ |

Health Insurance Information

Health Insurance Information includes information about health insurance payments.

Do you have a change in health insurance information to report?

| Yes | ⬍ |

Next

5.4.4.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	5.8.2 Select Change Types

5.4.5 <CR189> ~~Personal Information Summary~~

~~The 'Personal Information Summary' page displays information about the primary applicant. Each information section (other than Name, which cannot be modified on a prepopulated form) now includes a description in help text and a 'Review' button which can be used to view the detailed page for the information and make changes if necessary.~~

~~5.4.5.1   Screenshot (Modify)~~

~~Figure 39: Personal Information Summary~~

Personal Details

(?) Help

(?) Please review your personal information for accuracy to ensure the proper benefit determination.

Review

Social Security Number (SSN):	If you have no SSN, have you applied for one?	Reason, why you don't have a SSN
XXX-XX-1234	--	Good Cause

Date of birth:	Marital status:	Gender:
1/1/2000	Married	Female

What language do you wish to be contacted in?	Police officer:	Relative of absent police officer:
English	No	No

Emancipated by a court order:	Are you the sponsor of an immigrant?	Citizenship status:
No	No	Alien

Alien status:	Do you have a sponsor?	Date of Entry
Asylee	No	1/1/2010

Country/Region or Origin	Veteran status:	When did you become a member of the household?
Antigua and Barbuda	--	--

Where You Live

(?) Help

(?) Please review the information about your residence in Puerto Rico.

Review

Describe your residency in Puerto Rico:	Where do you live?	When did you start living here?
Permanent	Home	1/1/2010

Race and Ethnicity

(?) Help

(?) Please review what you have told us about your race and/or ethnic origin. This information is used to determine eligibility for some programs but is not required.

Review

Black or African American	American Indian or Alaskan Native	Asian
Yes	No	No

Hawaiian or Pacific Islander	White or Caucasian	Other
No	No	No

Decline to Answer	Ethnicity	
No	Not Hispanic or Latino	

Education

(?) Help

(?) Please review what you have told us about your attendance at school.

Review

School Type	What is the name of the school?	Do you attend full or part time?
Undergraduate	University	Part Time

Next

5.4.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Personal Information Summary

5.4.6 Information About You

The 'Information About You' page gathers basic information about the primary applicant, such as address and contact information. Modifications were made to prevent changes to name fields for all prepopulated forms. Change of Circumstances and Renewal forms were also modified to remove the 'Help paying for your health benefits' cluster.

5.4.6.1 Screenshot (Modify)

GOVERNMENT OF PUERTO RICO
Department of Health
Medicaid Program

Figure 40: Information About You <CR189> Application

Contact Details   (?) Help

27 Phone number we are using to send your one-time code. You can change this number from the Your Setting page.

123-456-7890

Home phone number: Optional

Work phone number: Optional

Cell phone number: Optional

Other phone number: Optional

Email

Email address: Optional

Help paying for your health benefits   (?) Help

39 Do you want to find out if you can get help paying for your health benefits?

Yes

40 Which category would you like to be evaluated for?

MAGI and Non-MAGI

41 If eligible, what is your preferred Managed Care Organization (MCO)?

MMM Multi Health

Next

Figure 41: Information About You – COC/Renewal

5.4.6.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Information about you

5.4.7   More About you

The 'More About You' page gathers additional information about the primary applicant, such as SSN, citizenship, and residence. This page has been modified to prevent changes to SSN and date of birth when it is prepopulated.

5.4.7.1   Screenshot (Modify)

Figure 42: More About You

Where You Live

Describe your residency in Puerto Rico.

| Permanent | ⬍ |

Where do you live?

| Home | ⬍ |

When did you start living here?
DD/MM/YYYY

| 24/08/1995 |

Which neighborhood is your address located in?   Optional

| --Please Select-- | ⬍ |

Race and Ethnicity

Please check the boxes to tell us about your race and/or ethnic origin. American Indian/Alaska Native applicants may qualify for the special enrollments and reduced health care costs. Please select 'Yes' if you are a member of such a tribe. If you do not wish to answer the question, select 'Decline to Answer'.

☐ Black or African American

☐ American Indian or Alaskan Native

☐ Asian

☐ Hawaiian or Pacific Islander

☐ White or Caucasian

☐ Other

☐ Decline to Answer

Ethnicity   Optional

| --Please Select-- | ⬍ |

[Next]

5.4.7.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	More About You

5.4.8   Applicant Details

The 'Applicant Details' page gathers additional, detailed information about the primary applicant, such as SSN, citizenship, and residence. This page has been modified to prevent changes to social security number and date of birth when it is prepopulated.

5.4.8.1   Screenshot (Modify)

Figure 43: Applicant Details

Are you a police officer of the Commonwealth?

No	⇕

Are you relative to a police officer of the Commonwealth who is not living in the home or deceased?

No	⇕

Have you been emancipated by a court order?

No	⇕

What is your citizenship status?

Alien	⇕

Please enter your alien details:
Alien status:

--Please Select--	⇕

Do you have a sponsor? Optional

--Please Select--	⇕

Date of Entry
DD/MM/YYYY

Country/Region of Origin

--Please Select--	⇕

Are you the sponsor of an immigrant? Optional

--Please Select--	⇕

What is your veteran status?

--Please Select--	⇕

When did you become a member of the household?
DD/MM/YYYY

Where You Live

Describe your residency in Puerto Rico.

--Please Select--	⇕

Where do you live?

--Please Select--	⇕

When did you start living here?

DD/MM/YYYY

[   ]

Which neighborhood is your address located in?

[--Please Select--   ▼]

Race and Ethnicity

(?) Help

Please check the boxes to tell us about your race and/or ethnic origin.

(?) Please check the boxes to tell us about your race and/or ethnic origin. This information is used to determine eligibility for some programs but is not required. If you do not wish to answer the question, select 'Decline to Answer'.

☐ Black or African American

☐ American Indian or Alaskan Native

☐ Asian

☐ Hawaiian or Pacific Islander

☐ White or Caucasian

☐ Other

☐ Decline to Answer

Ethnicity Optional

[--Please Select--   ▼]

Education

If you are in school, please select the type of school you are attending.

[Undergraduate   ▼]

Please enter your school details below:
What is the name of the school? Optional

[   ]

Do you attend full or part time? Optional

[Part Time   ▼]

(**Next**)

5.4.8.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Applicant Details

5.4.9   <CR189> Current Members

The 'Current Members' page provides a list of each member on the case. Primary member will be able to remove members, as needed.

5.4.9.1   Screenshot (Modify)

Figure 44: Current Members
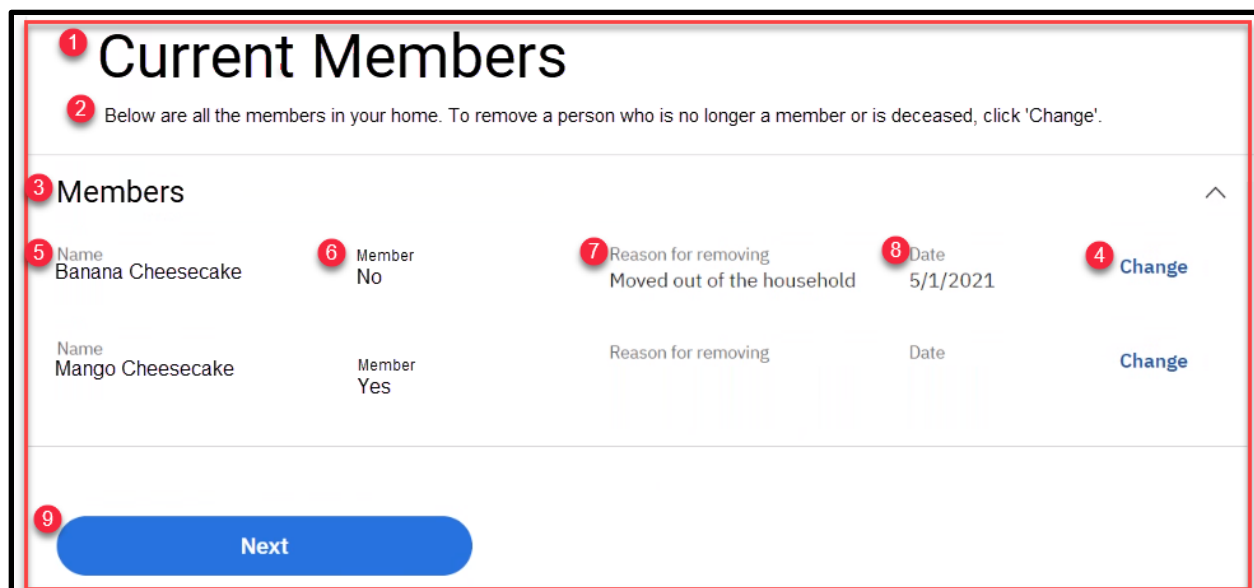
5.4.9.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Current Members

5.4.10 <CR189> Home Information

The 'Home Information' page allows the primary member to indicate if the member is part of the household.

5.4.10.1   Screenshot (Modify)

Figure 45: Home Information

5.4.10.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Home Information

5.4.11 Home Member Information Summary

The 'Home Member Information Summary' page displays information about a member of the household. Each information section now includes a description in help text and a 'Review' button which can be used to view the detailed page for the information and make changes if necessary. The members' SSN has also been masked to show only the last 4 digits when it has been prepopulated.

5.4.11.1   Screenshot (Modify)

Figure 46: Home Member Information Summary

5.4.11.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Home Member Information Summary

5.4.12 Home Member Information

The 'Home Member Information' page gathers detailed information about a household member, such as name, SSN, citizenship, and residence. This page has been modified to prevent changes to name, social security number and birth date when it is prepopulated. An additional modification was made for Change of Circumstances and Renewal forms to remove the 'Help paying for your health benefits' cluster. The members' SSN has also been masked to show only the last 4 digits when it has been prepopulated.

5.4.12.1   Screenshot (Modify)

Figure 47: Home Member Information - <CR189> Existing Member ~~Application~~

Home Member Information

Your household

👤 Stawberry
   Age 20

Please enter the details about the next person in your home.

Person Details   ⑦ Help

⑦ First name, Middle name, Last name, Second last name:
   Please enter this person's name. You must provide the person's first, and last name.
   Gender:
   Please select whether this person is male or female.
   Social Security Number (SSN):
   Please enter this person's SSN, if they have one. If not, please tell us if this person has applied for a SSN.
   Date of Birth:
   Please tell us this person's date of birth. Enter the date in the format of DD/MM/YYYY, e.g., 31/12/2008.
   Marital Status:
   Please select this person's marital status from the list provided.

(9) First name:
Strawberry

(10) Middle name:

(11) Last name:
Cheesecake

(12) Second last name:

(17) Social Security Number (SSN):
XXX-XX-1234

(21) Date of birth:
24/08/1995

Gender:
| Male | ⬍ |

Gender identity: Optional
| Male | ⬍ |

Marital status:
| Single | ⬍ |

17

Social Security Number (SSN):

XXX-XX-1234

21

Date of birth:

24/08/1995

Gender:

| Male | ⇕ |

Gender identity: Optional

| --Please Select-- | ⇕ |

Marital status:

| --Please Select-- | ⇕ |

Is this person a police officer of the Commonwealth?

| --Please Select-- | ⇕ |

Is this person relative of a police officer of the Commonwealth who is not living in the home or deceased?

| --Please Select-- | ⇕ |

Has this person been emancipated by a court order?

| --Please Select-- | ⇕ |

What is this person citizenship status?

| Alien | ⇕ |

Please enter their alien details below:
Alien status:

| --Please Select-- | ⇕ |

Does this person have a sponsor? Optional

| --Please Select-- | ⇕ |

Date of Entry
DD/MM/YYYY

| |

Country/Region of Origin

| --Please Select-- | ⇕ |

Is this person the sponsor of an immigrant? Optional

| --Please Select-- | ⇕ |

~~Figure 48: Home Member Information – COC and Renewal~~

5.4.12.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Home Member Information

5.4.13 <CR189> Address Summary

The 'Address Summary' page will display the primary residential address, mailing address, and any additional address in the case. From this page, primary member will be able to modify the primary residential and mailing address, as well as add additional addresses for each member not living in the primary address.

5.4.13.1 Screenshot (Modify)

Figure 49: Address Summary

5.4.13.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Address Summary

5.4.14 <CR189> Address Details

From the 'Address Detail' page, the primary member will be able to indicate if the member is living in the primary address. If not, a new address can be added.

5.4.14.1   Screenshot (Modify)

Figure 50: Address Details

5.4.14.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Address Details

5.4.15 General Information Summary

The 'General Information Summary' page displays information from various categories about the primary member and the members of the household, or of the user only, per Table 3: User Account and Functionality Mapping. Each information section now includes a description in help text and a 'Review' button which can be used to view the detailed page for the information and make changes if necessary.

5.4.15.1   Screenshot (Modify)

Figure 51: General Information Summary

Pregnancy Details

27 Help

27 ⑦ Please review the information we have on your file about pregnancy.

Member Name	Number of children	Expected Due Date	29 Review	Remove
Strawberry	1	10/10/2020		

Pregnancy end date

⊕ Add...

Foster Care Details

36 Help

36 ⑦ Please review the information we have on your file about foster care.

First name	State	Foster Care notification Type	38 Review	Remove
Strawberry	--	--		

⊕ Add

Former Foster Care Details

44 Help

44 ⑦ Please review the information we have on your file about former foster care.

First name	State	Enrolled	46 Review	Remove
Strawberry	--	--		

⊕ Add

Adoption Details

52 Help

52 ⑦ Please review the information we have on your file about adoption programs.

Adoption agreement type	Start Date	54 Review	Remove
--	--		

⊕ Add

<CR189>

5.4.15.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	General Information Summary

5.4.16 Summary of Your Income

The 'Summary of Your Income' page displays information about various types of income for the primary member and the members of the household, or of the user only, per Table 3: User Account and Functionality Mapping. Each information section now includes a description in help text and a 'Review' button which can be used to view the detailed page for the information and make changes if necessary.

5.4.16.1   Screenshot (Modify)

Figure 52: Summary of Your Income

Other Income Details

(?) Help

(?) Other income is any income that a person receives that is not paid income for a job or self-employment. Examples of other income include bingo/gambling winnings, SSI, pensions/retirement, royalties, compensation, unemployment benefits, dividends/interest, child care, spousal care/alimony, cash from relatives or friends, rental income, veteran's benefits etc.

Review   Remove

First Name	Type of Income	Frequency
Strawberry	Bingo/Gambling Winnings	Once Off

Amount
$1,000

⊕ Add...

Trust Income Details

(?) Help

(?) Please review the information about trust income.

Review   Remove

First Name	Type of Income	Frequency
Strawberry	Fruit Trust	Once Off

Amount
$45,000

⊕ Add...

Annuity Income Details

(?) Help

(?) Please review the information about annuity income.

Review   Remove

First Name	Type of Income	Frequency
Strawberry	Fixed Annuity	Once Off

Amount
$1,000

⊕ Add...

Next

5.4.16.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Summary of Your Income

5.4.17 Summary of Your Expenses

The 'Summary of Your Expenses' page displays information about various types of expenses for the primary member and the members of the household, or of the user only, per Table 3: User Account and Functionality Mapping. Each information section now includes a description in help text and a 'Review' button which can be used to view the detailed page for the information and make changes if necessary.

5.4.17.1 Screenshot (Modify)

Figure 53: Summary of Your Expenses

5.4.17.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Summary of Your Expenses

5.4.18 Summary of Your Resources

The 'Summary of Your Resources' page displays information about various types of resources for the primary member and the members of the household, or of the user only, per Table 3: User Account and Functionality Mapping. Each information section now includes a description in help text and a 'Review' button which can be used to view the detailed page for the information and make changes if necessary.

5.4.18.1   Screenshot (Modify)

Figure 54: Summary of Your Resources

5.4.18.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Summary of Your Resources

5.4.19 Health Insurance Summary

The 'Health Insurance Summary' page displays information about health insurance paid for by the primary member and the members of the household, or of the user only, per Table 3: User Account and Functionality Mapping. The information section now includes a description in help text and a 'Review' button which can be used to view the detailed page for the information and make changes if necessary.

5.4.19.1   Screenshot (Modify)

Figure 55: Health Insurance Summary
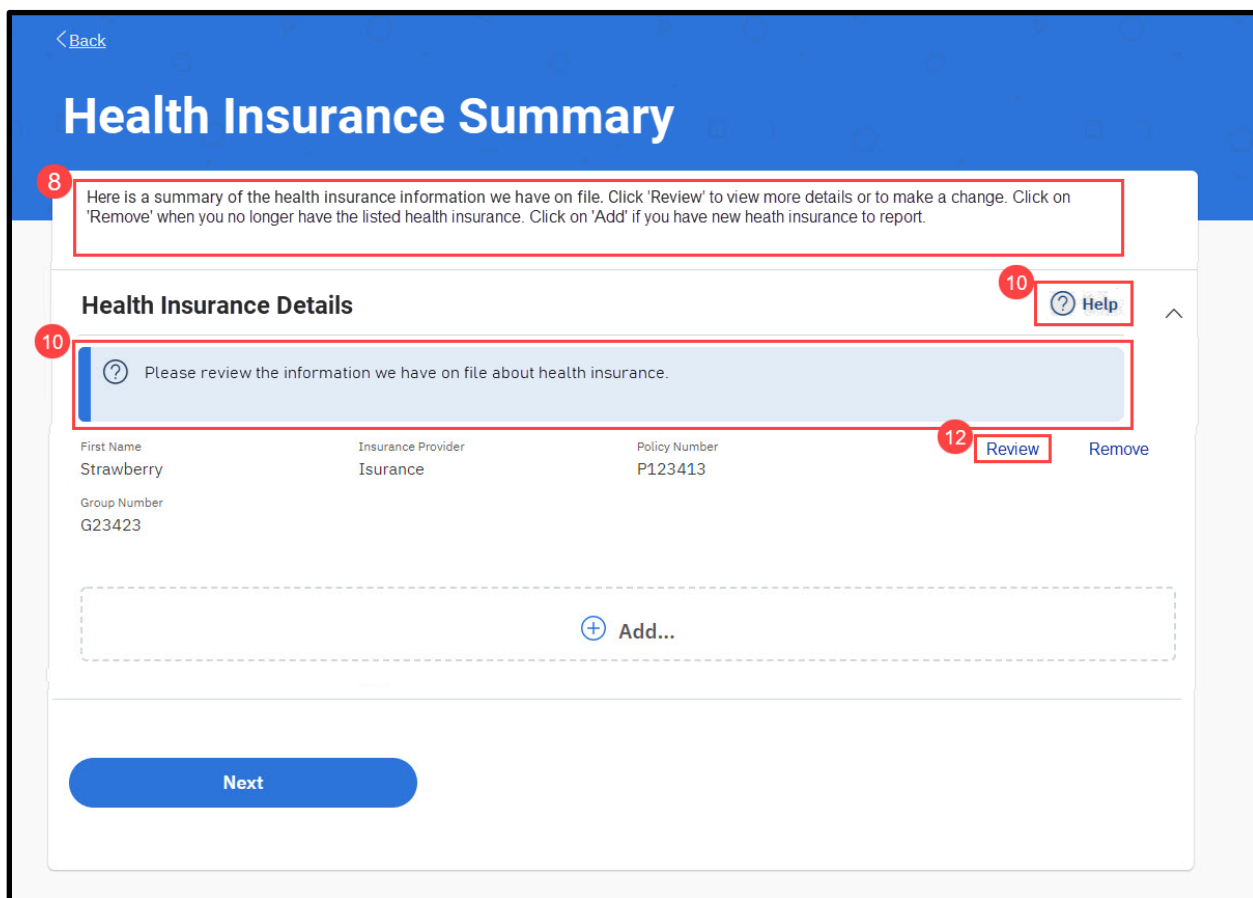
5.4.19.2   Description of Modifications and Additions

Details located in:

Document	Tab Name

Online COC - App COC & Renewal.xlsx	Health Insurance Summary

5.4.20 Electronic Signature

The 'Electronic Signature' page provides the rights and responsibilities information to the user and gathers the user's consent and electronic signature. This page is modified to change the wording of the signature checkbox for Change of Circumstance and Renewal form signatures.

5.4.20.1   Screenshot (Modify)

Figure 56: Electronic Signature – Applicant's Signature Cluster – Change of Circumstance

Figure 57: Electronic Signature – Applicant's Signature Cluster – Renewal

5.4.20.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Electronic Signature

5.4.21 Confirmation

The 'Confirmation' page is displayed after the user has successfully submitted his/her completed change of circumstance or renewal form. It also provides guidance on the next steps for the user. Its wording is slightly different for each case, as shown below.

5.4.21.1   Screenshot (New)

Figure 58: Confirmation – Change of Circumstance

Confirmation

✓

Change Submitted

✓ **We sent you a confirmation email.**

What's next: **Provide required supporting documentation**

Provide proof which is required by uploading documentation to PSPMPR , mailing, or dropping off documentation at your local office. You may need to include some of the following items:
• ID proof (Driver's License, Voting ID)
• Citizenship (U.S. Passport, Birth Certificate)
• SSN (Social Security Card)
• Address
• Proof of Age (Driver's License, Birth Certificate, Marriage Certificate)
• Income (Pay Stub, Alimony, Evidence of Unemployment Benefits, Evidence of Aid Received from Family, and Social Security, Retirement, Veteran, Military or State derived Income)
• Resources (Cash, Checking and Savings Accounts, Bonds, Stocks, Life Insurance)
• Medical Insurance (Medical Insurance Card)

The Your Documents page will show you which information is required.

Click here to go to Your Documents to upload your supporting documentation.

Decision

Once we've processed your change, you'll receive a notice telling you the decision we made.

Figure 59: Confirmation – Renewal

5.4.21.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Confirmation

5.4.22 Exit

The 'Exit' page is displayed when a user chooses to exit during the process of filling out any form. For any of the change forms, the exit page informs the user that information will not be saved. For a renewal form, it informs the user that information will be saved and can be resumed later.

5.4.22.1 Screenshot (Modify)

Figure 60: Exit – COC <CR189>
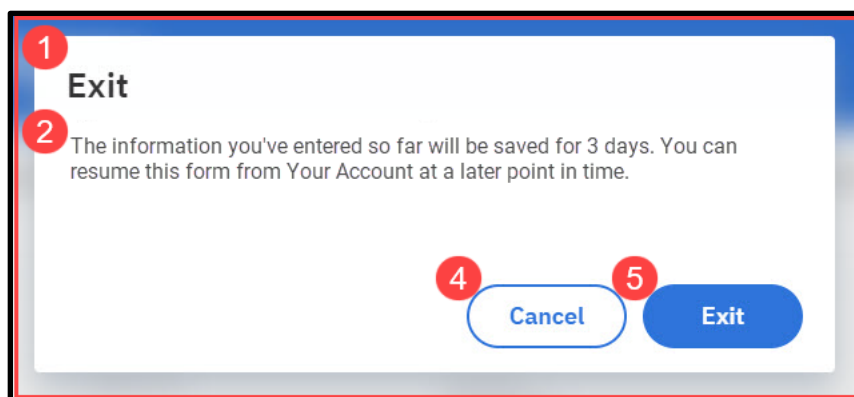
Figure 61: Exit - Renewal
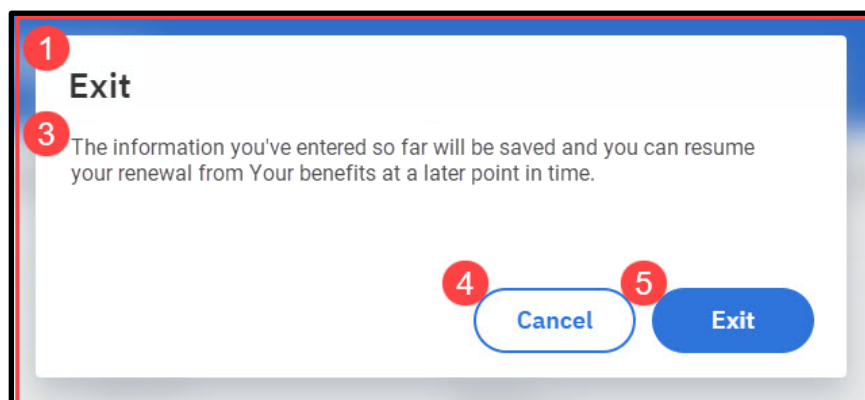
5.4.22.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Exit

5.5 <CR189> Change Address

The Change Address functionality allows the user to report change in address for the household. The user can report a single or multiple address changes. The user can also either report changes to the residential address or mailing address or both.

Figure 62: Change Address Page Flow
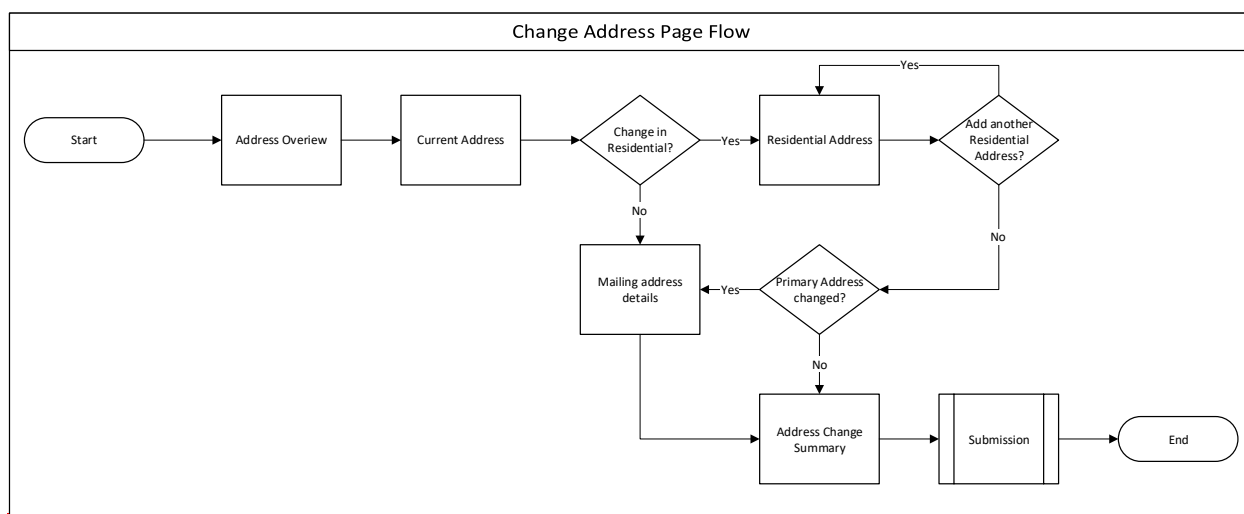
5.5.1 Address Overview

The 'Address Overview' page is displayed when the user indicates that he/she wants to update an address on their case. This page provides a brief overview on how to update the address(es) on the case.

5.5.1.1 Screenshot (New)

Figure 63: Address Overview
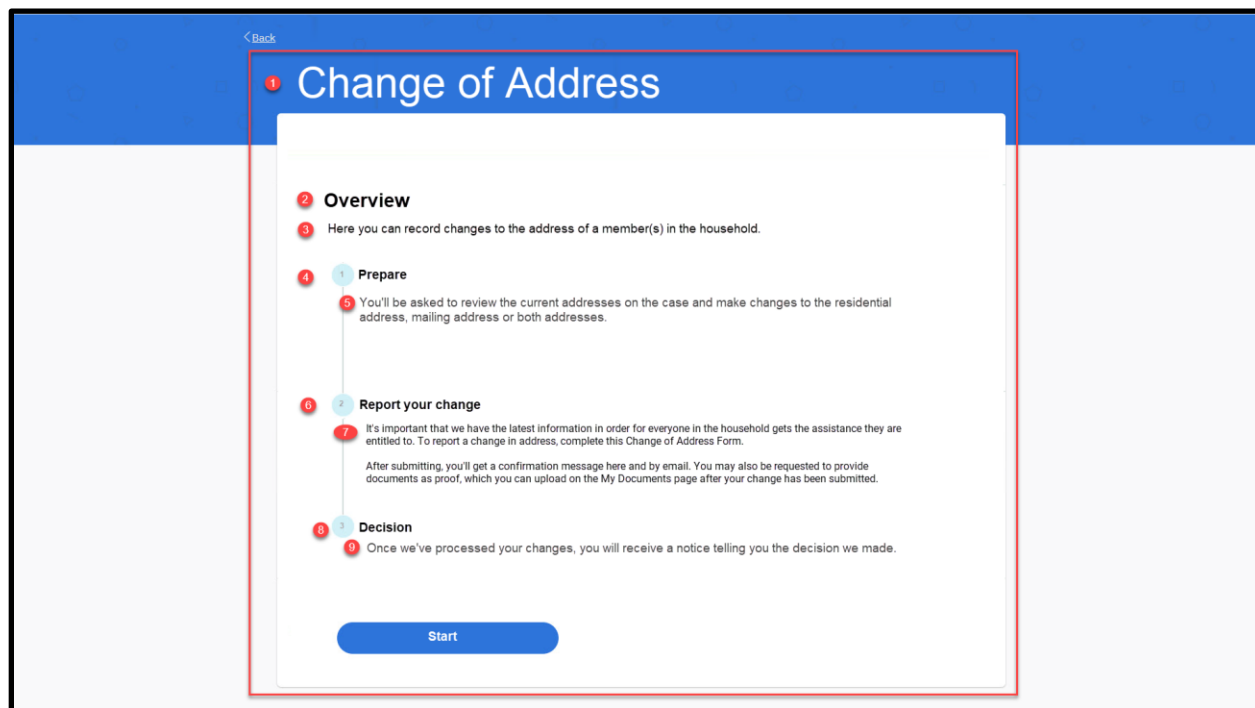
5.5.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-COC-Address.xlsx	Address Overview

5.5.2 Current Address

The 'Current Address' page displays the list of all current addresses on the case. The user can view the address(es) and the members living in each of the address as recorded on their case. User can choose to change either the residential and/or mailing address.

5.5.2.1 Screenshot (New)

Figure 64: Current Address
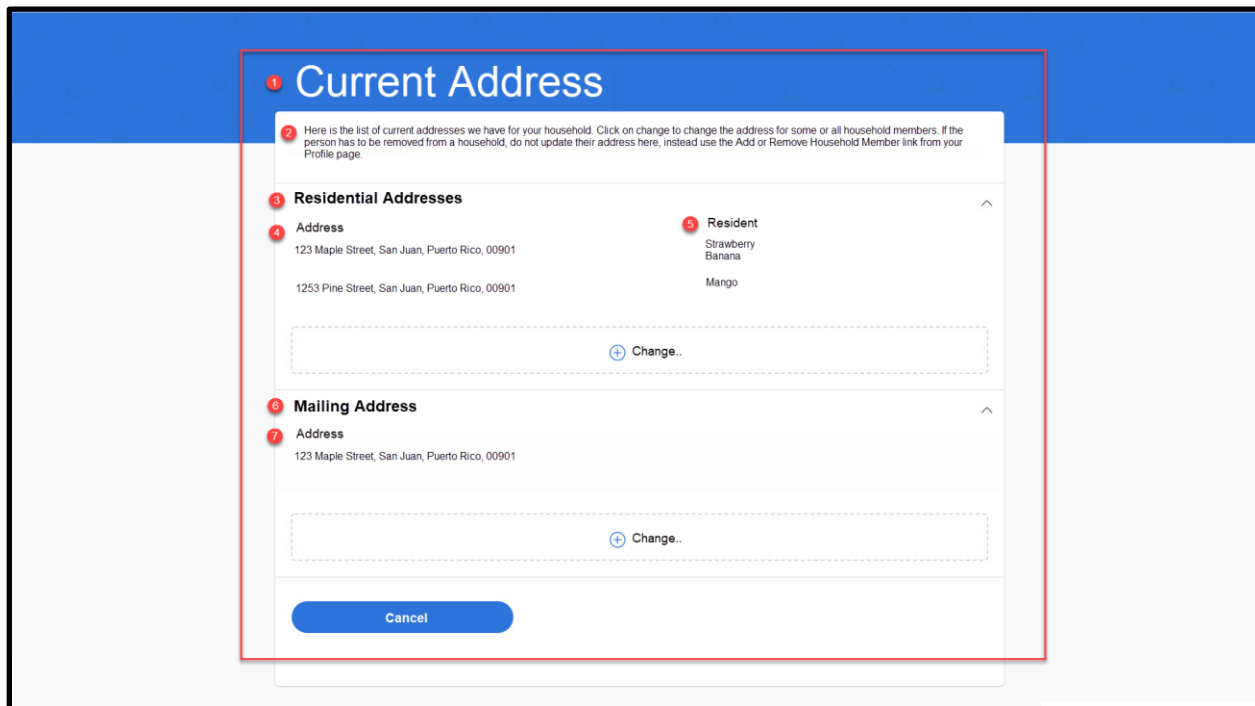
5.5.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-COC-Address.xlsx	Current Address

5.5.3 Residential Address Detail

The 'Residential Address Detail' page collects the list of members who are moving to the new address and the new residential address details. The user can search for the zip code, city, and neighborhood if the new address is in Puerto Rico. The user can enter more than one address by stating they have more address changes to report.

5.5.3.1 Screenshot (New)

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Figure 65: Residential Address Detail

5.5.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-COC-Address.xlsx	Residential Address Detail

5.5.4   Mailing Address Detail

The 'Mailing Address Detail' page gathers the new mailing address details. A user can choose to either retain their current mailing address or change it to be the same as the new residential address they reported or report a new mailing address.

5.5.4.1 Screenshot (New)

Figure 66: Mailing Address Detail

5.5.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name

| CitizenPortal-COC-Address.xlsx | Mailing Address Detail |

5.5.5   Address Change Summary

The 'Address Change Summary' displays the list of all the changes that the user has reported in the previous sections. The user can review the changes and either edit or delete the change as needed.

5.5.5.1   Screenshot (New)

Figure 67: Address Change Summary
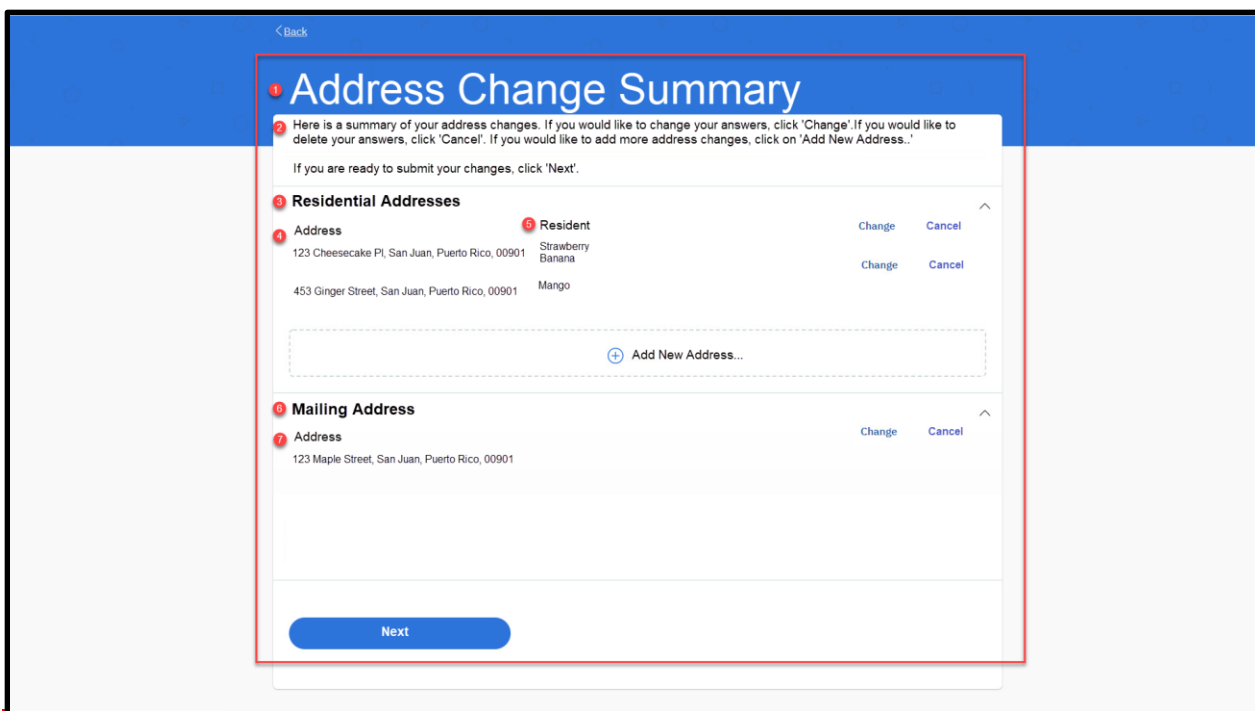
5.5.5.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-COC-Address.xlsx	Address Change Summary

5.6   <CR189> Add and Remove Household Member

The Add and Remove Household Member functionality allows the user to remove

and add members to the household. The user can add and remove single or multiple household members. When a user adds a new household member it is equivalent to starting the application for the newly added members and will collect all relevant information.

Figure 68: Add and Remove Household Member Page Flow
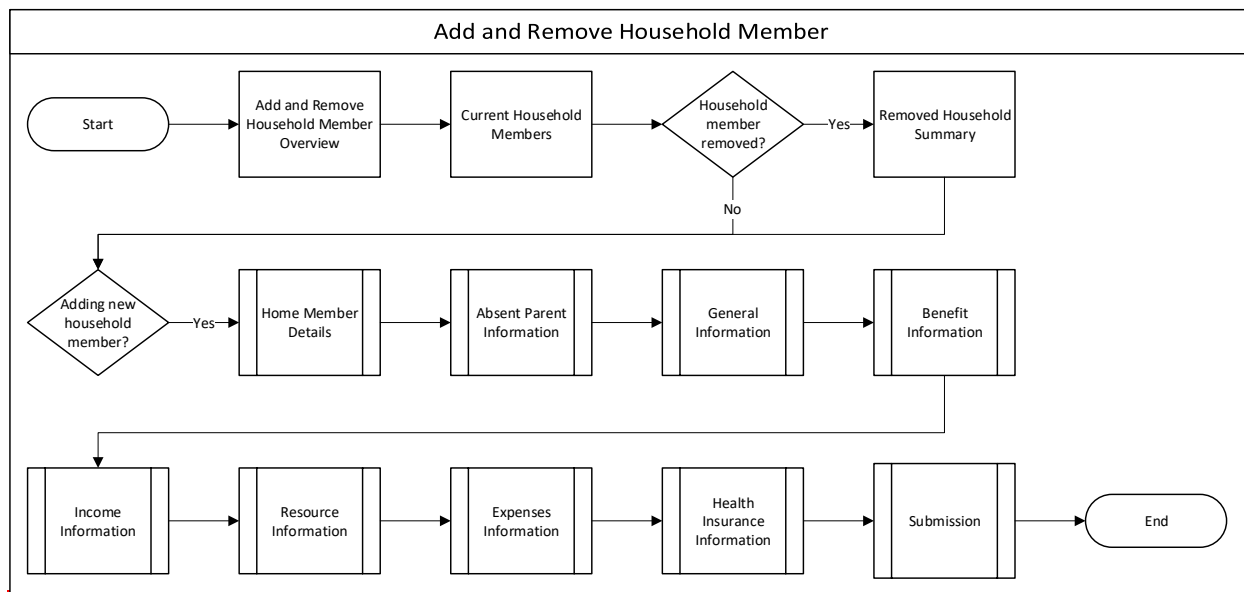
5.6.1 Add and Remove Household Member Overview

The 'Add and Remove Household Member Overview' page is displayed when the user indicates that he/she wants to add and/or remove a household member on their case. This page provides a brief overview on how to add and remove household members on the case and the information that will be collected.

5.6.1.1 Screenshot (New)

Figure 69: Add and Remove Household Member Overview
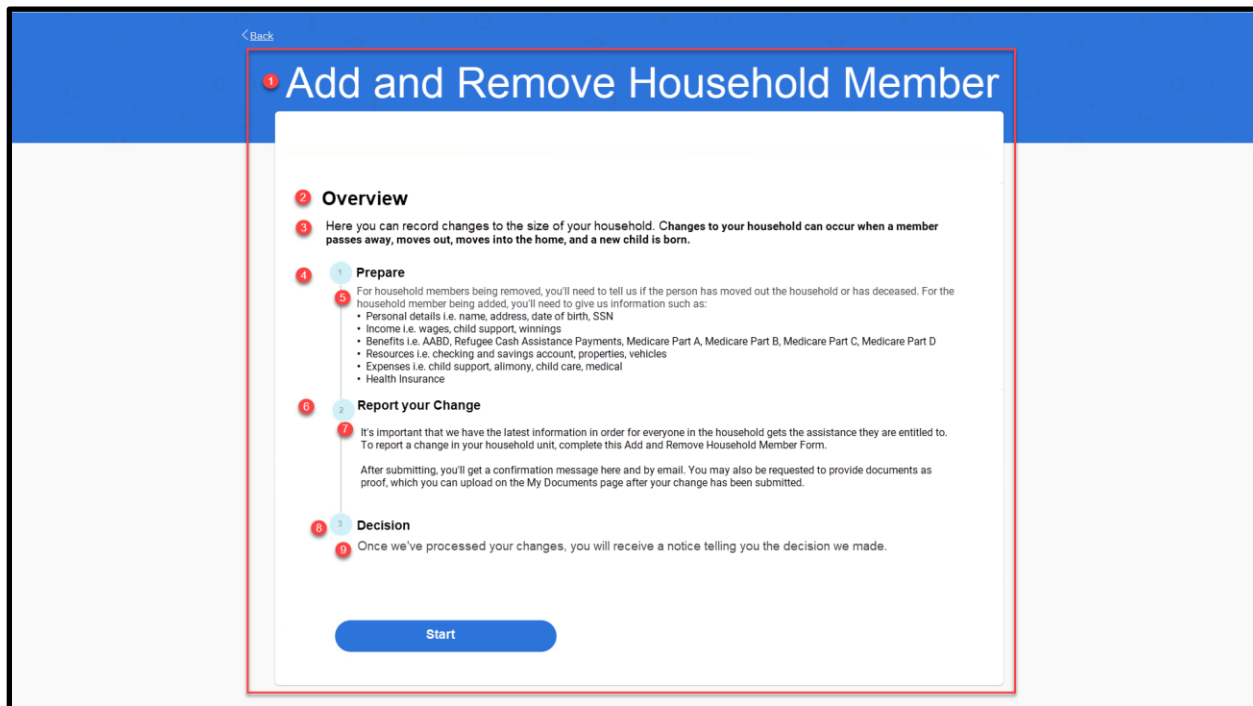
5.6.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - AddRemoveHHM.xlsx	Add and Remove Household Member Overview

5.6.2 Current Household Details

The 'Current Household Details' page displays the list of all household members on the case. The user can view the list and remove one or multiple household members. When the user selects to remove a household member, the reason for removal and the corresponding date is also captured. The user can indicate if he/she wants to add a household member. If the user chooses to add a household member, it is treated as an application and the user is prompted to enter all the details of the household member including demographic, address, general information, income, resource, and expense information. The relationships details are gathered for each new member against everyone in the household. The user can choose to add one or multiple household members.

5.6.2.1 Screenshot (New)

Figure 70: Current Household Details

5.6.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC – AddRemoveHHM.xlsx	Current Household Details

5.6.3 Removed Household Member Summary

The 'Removed Household Member Summary' displays the list of all the household members the user reported as moved out of the household in the previous sections. The user can review the changes and either edit or delete the change as needed.

Once the user reviews the information on this page and clicks on Next, the system must treat the person as being removed from the household. It must not display the removed household member information on subsequent screen in any given form/process, including but not limited to the relationship status of the removed household members with other members of the household, general information, income, expense, resources and health insurance for the removed household member(s). This is true for all prepopulated forms.

Once the user submits the prepopulated form and has indicated that he/she wants to remove a household member, the household member record on the IC case is end dated as follows –

       a. If the removed household member has moved out of the house, use the moved-out date and end date the household member record with the moved-out date.

       b. If the removed household has deceased, then end date the household member record with the date of death. Also, record the date of death on the Person record for the deceased household member.

5.6.3.1 Screenshot (New)

Figure 71: Removed Household Member Summary Page
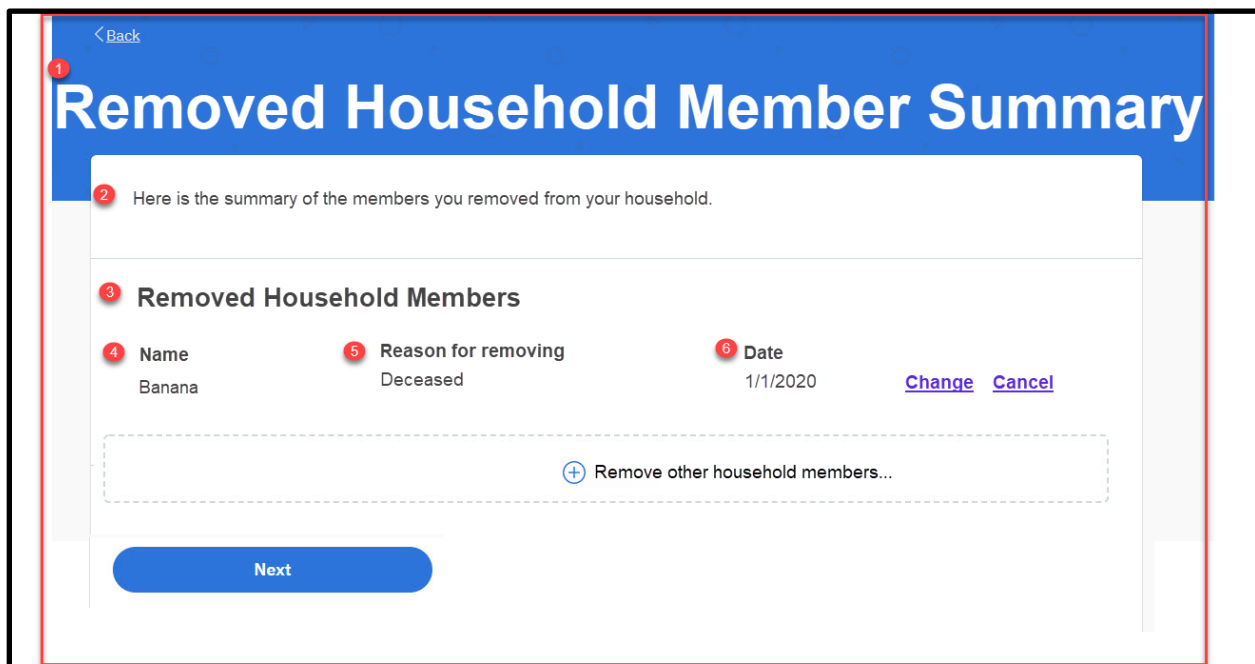
5.6.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - AddRemoveHHM.xlsx	Removed HH Member Summary

5.7 <CR189> Change Income

The 'Change Income' functionality allows the user to report change in income. The user can report a single or multiple income changes. The user can make changes to employment, self-employment, other income, trust, and annuity incomes. The user can also indicate if they are no longer receiving a source of income.

Figure 72: Change in Income Page Flow
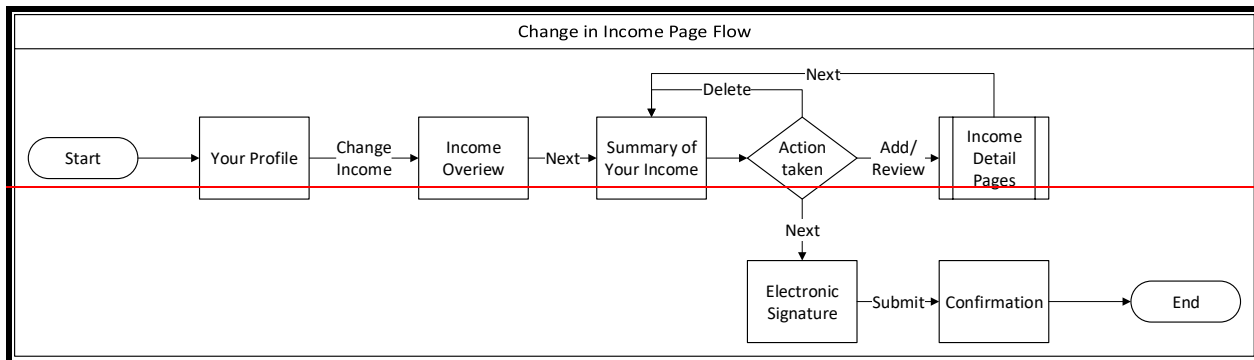
5.7.1 Income overview

The 'Income Overview' page is displayed when the user indicates that he/she wants to update an income on their case. This page provides a brief overview on how to update the income(s) on the case.

5.7.1.1 Screenshot (New)

Figure 73: Income Overview
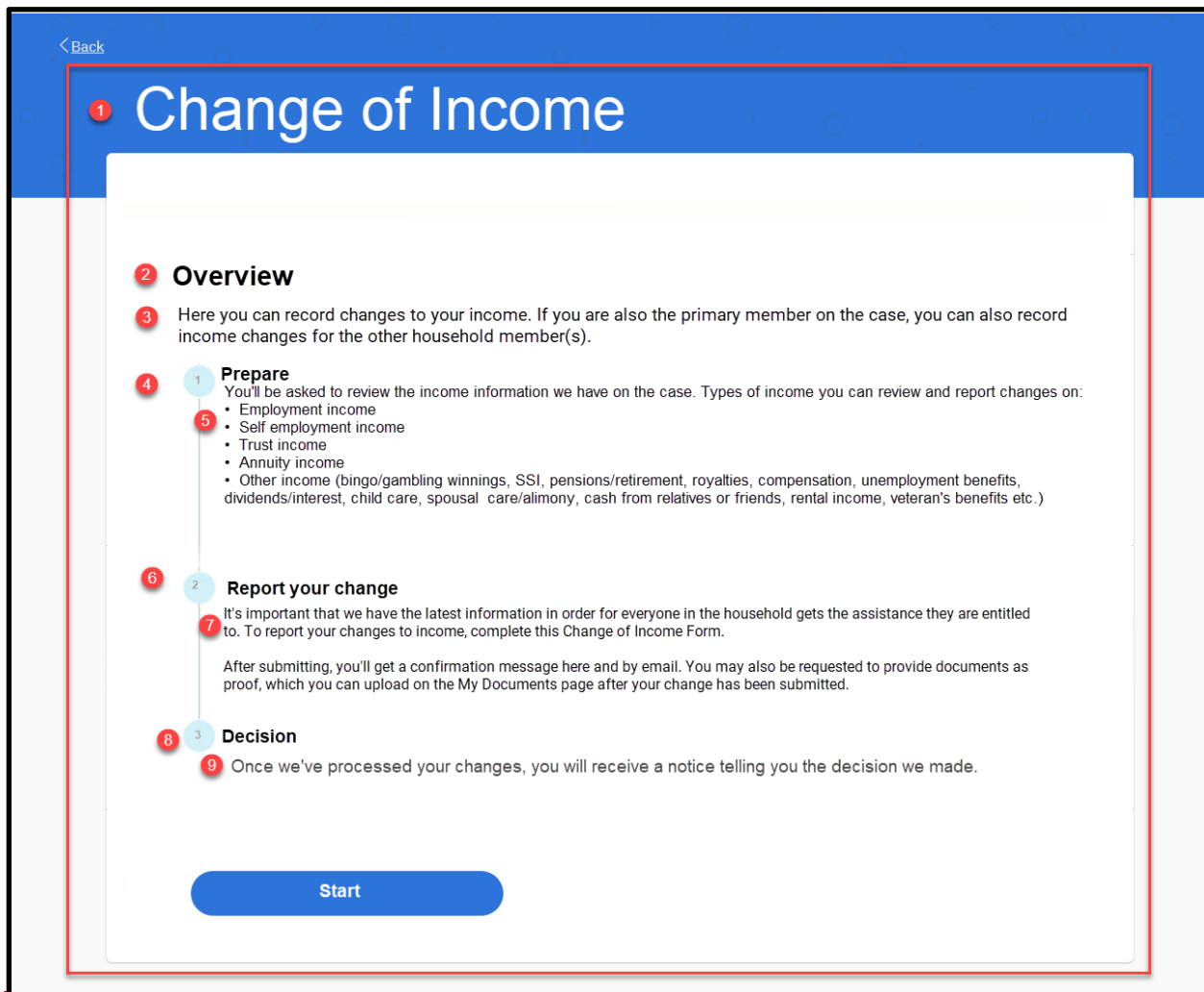
5.7.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - App COC & Renewal.xlsx	Income Overview

5.8 Person Case

This section contains the modifications made to the Person Case to support Citizen Portal.

Figure 74: Person Case Action Menu Page Flow
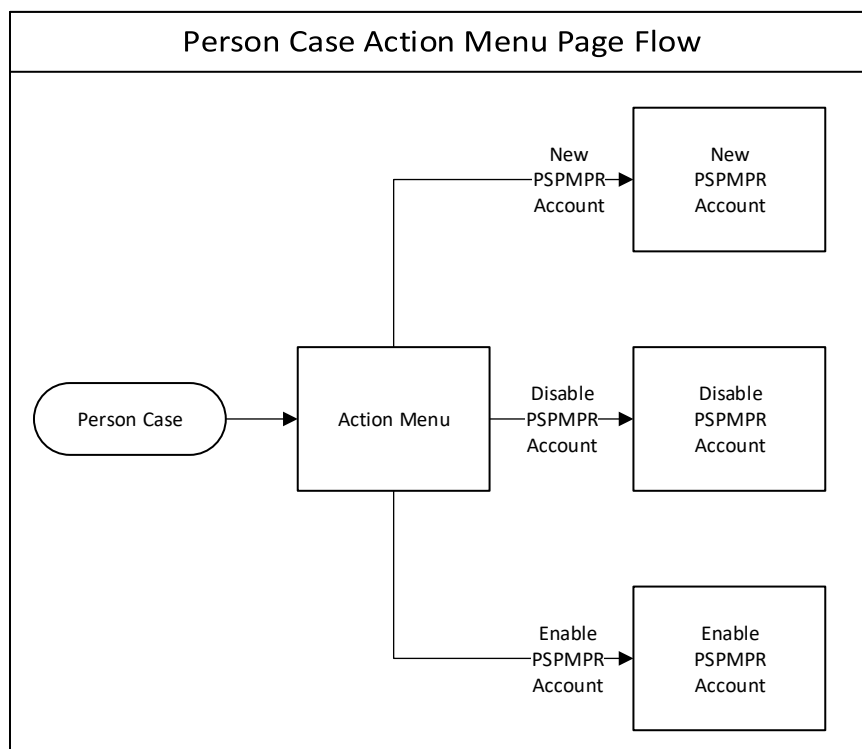
5.8.1 Action Menu

The Action Menu provides different actions to take against the Person Case, including creating, enabling, disabling a Citizen Portal Account. These links are being updated to refer to the Citizen Portal as PSPMPR instead of Universal Access.

The 'New PSPMPR Account' link will only be visible if the person has not been linked to an External User account, either by systematically or manually linked from the External User profile.

The 'Disable PSPMPR Account' link will only be visible if the person has been linked to an External User account, either by systematically or manually linked from the External User profile AND the External User account is enabled.

The 'Enable PSPMPR Account' link will only be visible if the person has been linked to an External User account, either by systematically or manually linked from the External User profile AND the External User account is disabled.

5.8.1.1   Screenshot (Modify)

Figure 75: New PSPMPR Account
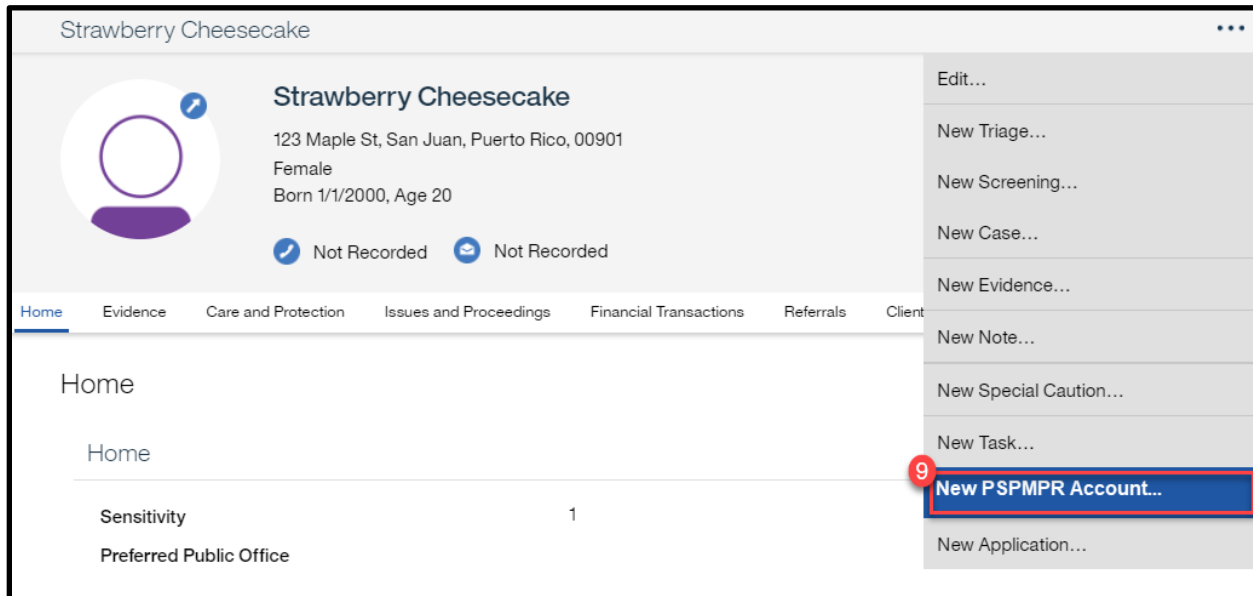
Figure 76: Disable PSPMPR Account
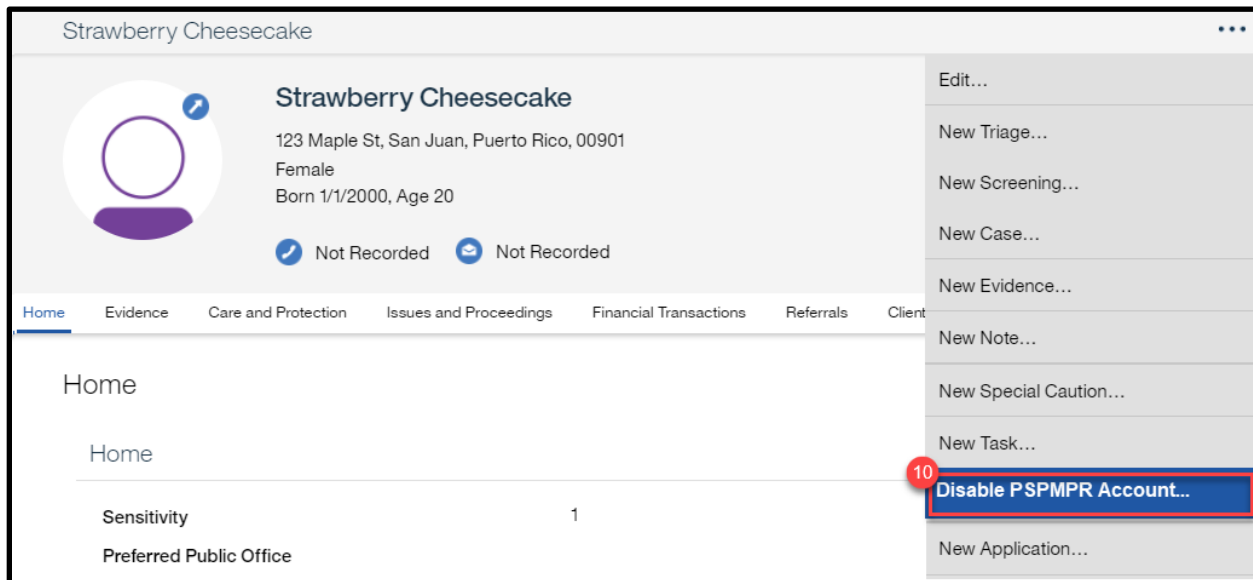
Figure 77: Enable PSPMPR Account
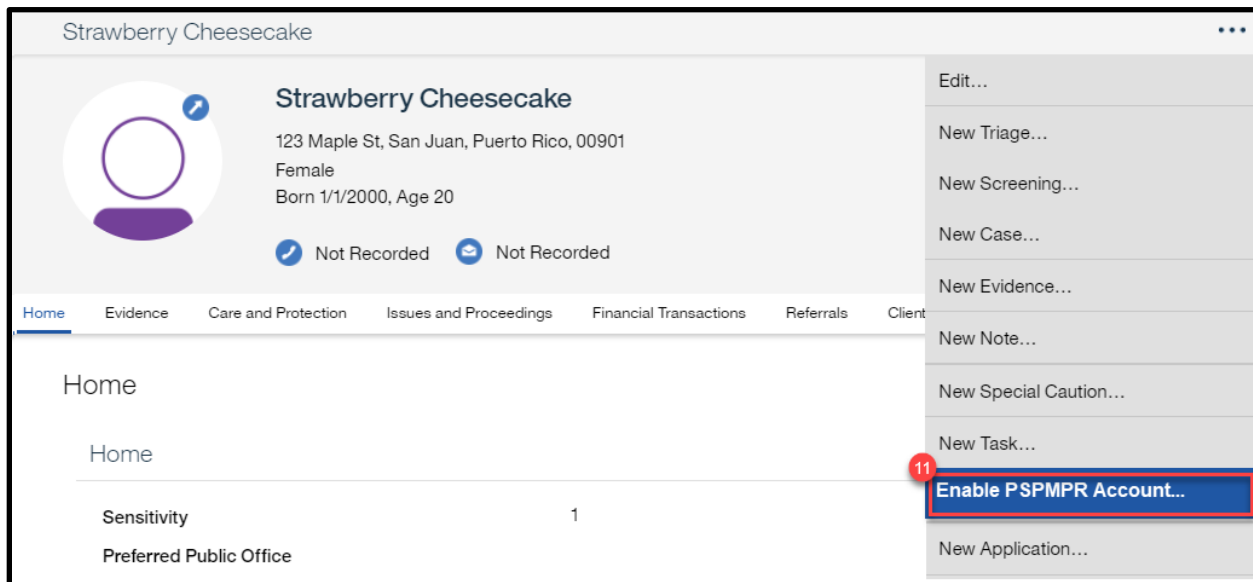
5.8.1.2   Description of Modifications and Additions

Details located in:

Document	Tab Name

Online COC - Worker Portal.xlsx	Person Action Menu

5.8.2 New PSPMPR Account

When the caseworker clicks on 'New PSPMPR Account' link from the action menu the 'New PSPMPR Account' popup will display. This popup will be prepopulated with the preferred email id for the user if it exists on the case. The caseworker can edit the email address if needed. The caseworker enters username specified by the client. The username and email id must be unique. When the 'Save' button is clicked, the following will occur:

- A random one-time use password is generated.

  Tech note: When the one-time use password is used the account should remain locked until the password is reset online by the user.

- The 'New PSPMPR Account with Temporary Password' notice is available for printing only.

  Tech note: A random one-time use password should be generated. (2) Once used, the account should remain locked until the password is reset.

- Client will receive the 'New Account Notification'

  Tech note: The OOTB email notification that was modified/replaced by the 'New PSPMPR Account' email notification

- Create the External User profile with the data from the Person profile. Create the Linked Participant record. Set ID Proofing status to Complete.

  Tech note: Creating the Linked Participant should trigger the 'Finalizing Linking Process', which will set the Account Type to Linked and trigger the Update External User Profile. For more details see the Linking External User with Person Process (Modify).

5.8.2.1   Screenshot (Modify)

Figure 78: New PSPMPR Account <CR189>

5.8.2.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - Worker Portal.xlsx	New PSPMPR Account

5.8.3   Disable PSPMPR Account

When the caseworker clicks on 'Disable PSPMPR Account' link from the action menu the 'Disable PSPMPR Account' popup will display. This popup will ask the caseworker to confirm before disabling the user account.

5.8.3.1 Screenshot (Modify)

Figure 79: Disable PSPMPR Account
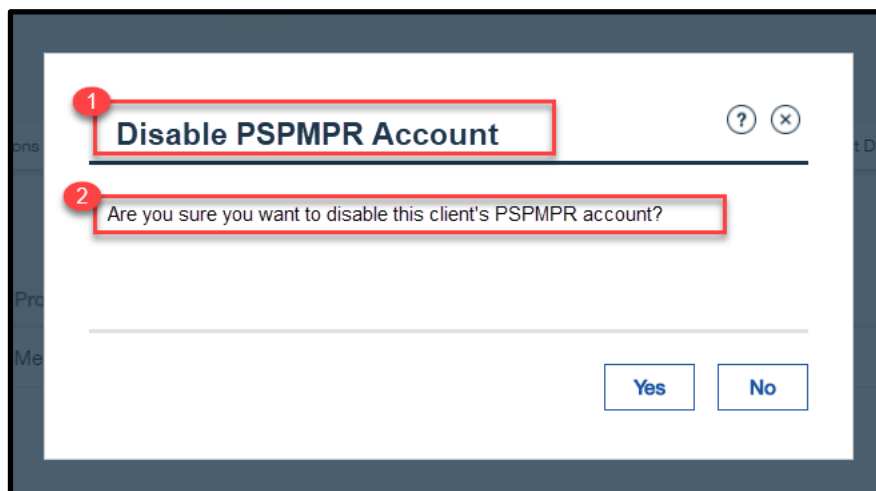
5.8.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - Worker Portal.xlsx	Disable PSPMPR Account

5.8.4 Enable PSPMPR Account

When the caseworker clicks on 'Enable PSPMPR Account' link from the action menu the 'Enable PSPMPR Account' popup will display. This popup will ask the caseworker to confirm before enabling the user account.

5.8.4.1 Screenshot (Modify)

Figure 80: Enable PSPMPR Account
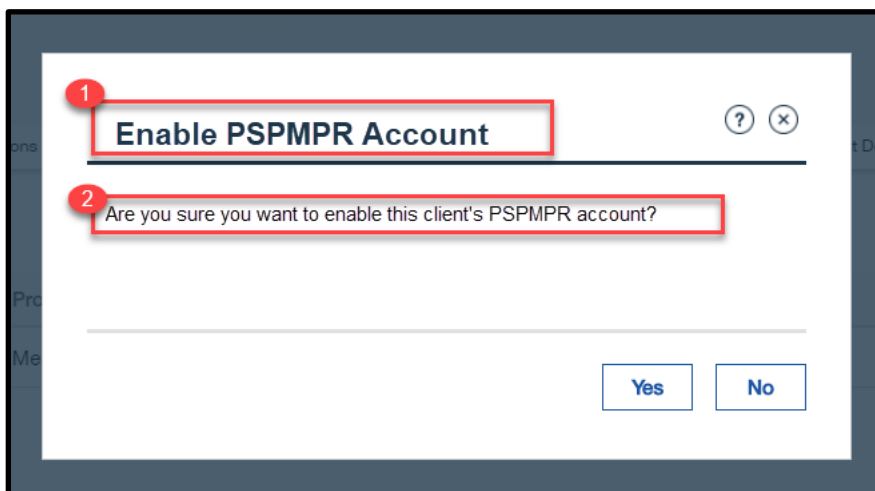
5.8.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - Worker Portal.xlsx	Enable PSPMPR Account

5.9 External User

This section contains the modification being made to the External User case to support Citizen Portal.

5.9.1 External User Attachment

The Attachment page is added to the External User module. The identification document provided by the External User via the Citizen Portal will be uploaded to this page.

5.9.1.1 Screenshot (Modify)

Figure 81: External User Attachments

5.9.1.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - Worker Portal.xlsx	External User Attachments

5.9.2   <CR189> External User Home

On the 'External User' Home tab, caseworkers can view the External User's email address and phone number.

5.9.2.1   Screenshot (Modify)

Figure 82: External User Home

5.9.2.2   Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - Worker Portal.xlsx	External User Home

5.9.3   <CR189> Edit External User

On the 'Edit External User' page, caseworkers can modify the External User's email address and phone number.

5.9.3.1 Screenshot (Modify)

Figure 83: Edit External User

5.9.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - Worker Portal.xlsx	Edit External User

6 Batch Modifications

The Batch Modifications section will provide a detailed list of all the batch and systematic processes being modified, added, or removed per the PRMP requirements associated to Citizen Portal FDD.

6.1 Linking External User with Person Process (Modify)

The 'Linking External User with Person' process is being modified to support the new features being introduced to PSPMPR, including the 'Link my account' form.

6.1.1 High Level Steps

Figure 84: Linking External User with Person Process <CR189>
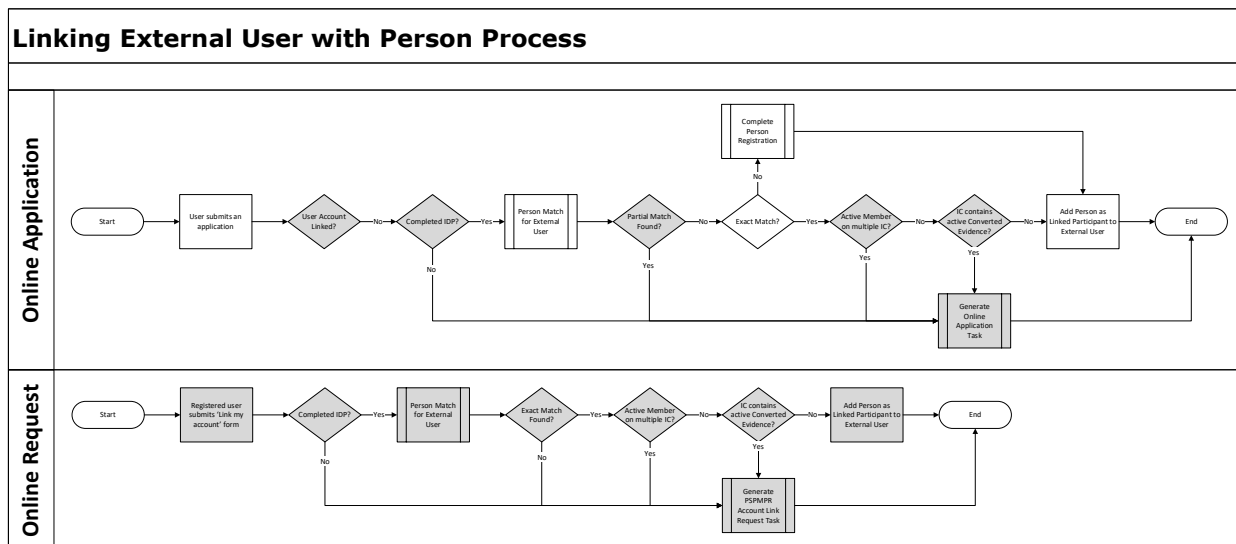
6.1.2 Predecessor

N/A

6.1.3 Successor

Finalizing Linking and Unlinking Process (Modify)

6.1.4 Execution Frequency

<CR189> Real-time ~~Nightly~~

6.1.5 Inputs

The inputs will be determined by the development team.

6.1.6 Outputs

The outputs will be determined by the development team.

6.1.7 Detailed Steps

Search for all applications submitted from a registered account since last execution of batch. For each application Execute Person Match for External User and perform the following:

- **IF** All the following are true after the Person Match Process is completed:
  - An Exact Match was found between External User and an existing Person participant record
  - Person has a single Household Member evidence without an end date (active on a single case)

- IC doesn't have a Converted evidence without an end date (case is no longer in converted mode)
  - ♦ **THEN** Execute the following
    - ♦ Create a Linked Participant record with the following data:
      - ▪ External User's Relationship = Person
      - ▪ Participant = Person
    - ♦ ~~Execute Finalizing Linking and Unlinking Process~~ (Modify)
    - ♦ ~~Generate 'Your Account Has Been Linked' notification~~
  - ♦ **ELSE** Generate Online Application Task

- ▪ **OR IF** The following is true after the Person Match Process is completed:
  - A No Match was found between External User and the existing Person participant records
  - ♦ **THEN** Execute the following
    - ♦ Complete Person Registration for the new person
    - ♦ Create a Linked Participant record with the following data:
      - ▪ External User's Relationship = Person
      - ▪ Participant = Person
    - ♦ ~~Execute Finalizing Linking and Unlinking Process~~ (Modify)
    - ♦ ~~Generate 'Your Account Has Been Linked' notification~~
  - ♦ **ELSE** Generate Online Application Task

Search for all 'Link my account' forms submitted since last execution of batch. For each application Execute Person Match for External User and preform the following:

- ▪ **IF** All the following are true after the Person Match Process is completed:
  - An Exact Match was found between External User and an existing Person participant record
  - Person have a single Household Member evidence without an end date (active on a single case)
  - IC doesn't not have a Converted evidence without an end date (case is no longer in converted mode)
  - ♦ **THEN** Execute the following
    - ♦ Create a Linked Participant record with the following data:
      - ▪ External User's Relationship = Person
      - ▪ Participant = Person
    - ♦ ~~Execute Finalizing Linking and Unlinking Process~~ (Modify)
    - ♦ ~~Generate 'Your Account Has Been Linked' notification~~
  - ♦ **ELSE** Generate PSPMPR Account Link Request Task

6.2 Finalizing Linking and Unlinking Process (Modify)

The purpose of the 'Finalizing Linking' process is to set the External User account with the correct account type. When a Person is added as a Linked Participant, the External User Account Type should be set to Linked. Similar, when the Person is removed, then the External User Account Type should be set to Registered.

6.2.1 High Level Steps

Figure 85: Finalizing Linking and Unlinking Process <CR189>
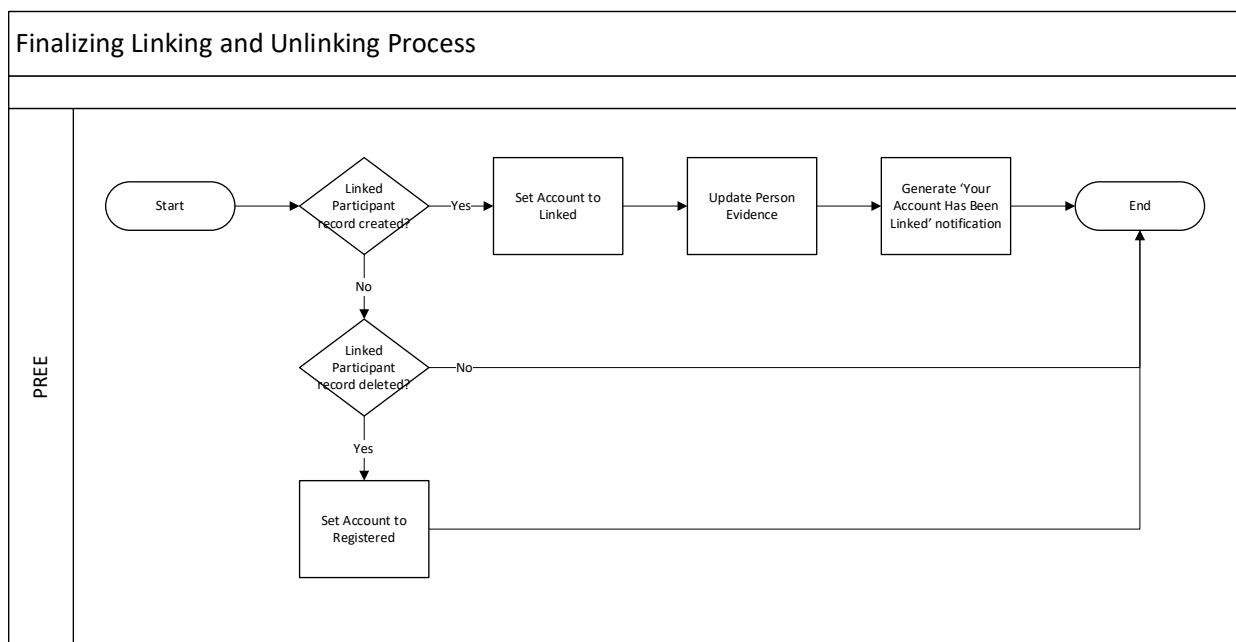
6.2.2 Predecessor

Linking External User with Person Process (Modify)

6.2.3 Successor

No Touch Online Application Process (Modify)

6.2.4 Execution Frequency

<CR189> Real-time Every time one of the following events occurs:

- ~~When triggered by Nightly,~~ After Linking External User with Person Process (Modify)

- When a caseworker creates a new Linked Participant record on the External User profile

- When a caseworker removes a Linked Participant record on the External User profile

6.2.5 Inputs

The inputs will be determined by the development team.

6.2.6 Outputs

The outputs will be determined by the development team.

6.2.7 Detailed Steps

- **IF** A Linked Participant record of type Person is added to the External User profile

  - ♦ **THEN** Set the External User Account Type to Linked **AND** Update Person's evidence **AND** Generate 'Your Account Has Been Linked' notification. ~~as need~~. See table below.

- **ELSE IF** A Linked Participant record of type Person was deleted the External User profile

- **THEN** Set the External User Account Type to Registered

Table 7: Person Evidence Updates

External User Data		Person Evidences		Comments
Your Settings	**Data**	**Evidence**	**Field: Data**	
Email Addresses	<email>	Email	**Email Address**: <email> **Type**: Personal **Preferred**: Yes	If evidence exist with same email address, then update evidence. Else, create new evidence
Cell phone number	<number>	Phone Number	**Phone Number**: <number> **Phone Type**: Mobile **Preferred**: Yes	If evidence exist with same number, then update evidence. Else, create new evidence
Language	<language>	Contact Preferences	**Preferred Language**: <language>	If evidence exist, then update evidence. Else, create new evidence

Paperless	Yes	Contact Preferences	**Preferred Communication**: Electronic/ Paperless	If evidence exist, then update evidence. Else, create new evidence
Paperless	No	Contact Preferences	**Preferred Communication**: Hard Copy	If evidence exist, then update evidence. Else, create new evidence

6.3 Defining External User Privilege Process (New)

The purpose of the 'External User Privilege' process is to support Table 3: User Account and Functionality Mapping by identifying the External User privilege each time the user logs in per the defined variables:

- Account Type
- ID Proofing
- User Role
- Identified IC

6.3.1 High Level Steps

Figure 86: Defining External User Privilege Process
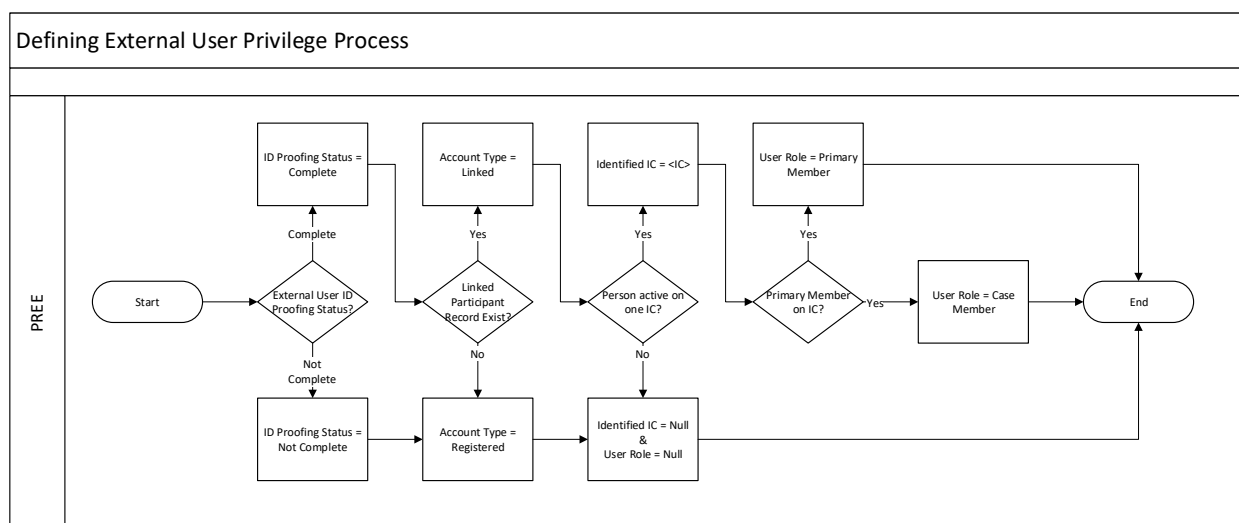
6.3.2   Predecessor

N/A

6.3.3   Successor

N/A

6.3.4   Execution Frequency

<CR189> Real-time, every time a user successfully logs into their account.

6.3.5   Inputs

The inputs will be determined by the development team.

6.3.6   Outputs

The outputs will be determined by the development team.

6.3.7   Detailed Steps

- **IF** External User ID Proofing Status is Complete

  - **THEN** IDProofingStatus = Complete
  - **ELSE** IDProofingStatus = Not Complete **AND** AccountType = Registered, IdentifiedIC = null **AND** UserRole = null

- **THEN IF** Participant Record exist for External User

  - **THEN** AccountType = Linked
  - **ELSE** AccountType = Registered

- **THEN IF** Person (Linked Participant) is on an active member on a single IC (number of Household Member Evidence without an end date = 1)

  - **THEN** IdentifiedIC = <Person's IC>
  - **ELSE** IdentifiedIC = Null **AND** UserRole = Null

- **THEN IF** Person (Linked Participant) is the Primary Member on the IdentifiedIC

  - **THEN** UserRole = Primary Member
  - **ELSE** UserRole = Case Member

6.4   No Touch Online Application Process (Modify)

The purpose of this process is to systematically process applications submitted online. When PREE cannot complete the entire application processing, a task will be generated to notify a caseworker.

6.4.1 High Level Steps

Figure 87: Citizen Portal No Touch Process <CR189>
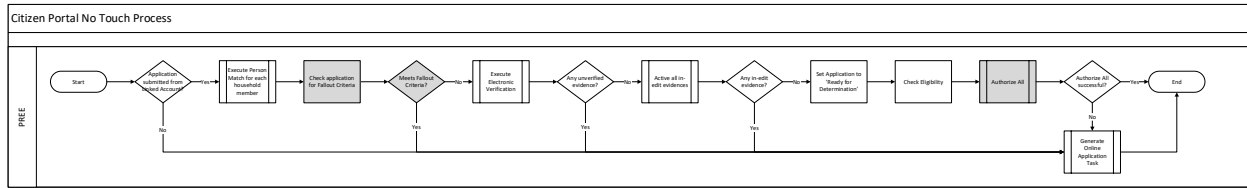
6.4.2 Predecessor

Defining External User Privilege Process (New)

6.4.3 Successor

N/A

6.4.4 Execution Frequency

Nightly

6.4.5 Inputs

The inputs will be determined by the development team.

6.4.6 Outputs

The outputs will be determined by the development team.

6.4.7 Detailed Steps

- ▪ **IF** the application was submitted from a Linked Account

- ▪ **THEN**
  - • Execute the Person Match for each household member
  - • Check application for Fallout Criteria (see below for criteria)
    - ▪ **THEN IF** the application meets Fallout Criteria
      - • **THEN** Fallout the process and generate 'Online Application Task'
      - • **ELSE** Execute the Electronic Verification process
        - ▪ **THEN IF** Any evidence is unverified
          - • **THEN** Fallout the process and generate 'Online Application Task'
          - • **ELSE** Activate each in-edit evidence
            - ▪ **THEN IF** There is any in-edit evidence
              - ▪ **THEN** Fallout the process and generate 'Online Application Task'
              - ▪ **ELSE**
                - ▪ Set Application to 'Ready for Determination'
                - ▪ Check Eligibility
                - ▪ Authorize All

- **THEN IF** Authorize All was NOT successful
  - **THEN** Fallout the process and generate 'Online Application Task'

- **IF** application was submitted via Citizen Portal

- **AND IF** application was submitted from a Linked Account

- **AND IF** application does NOT meet one of the Fallout Criteria
  - **THEN** Execute Electronic Verification
  - **ELSE** Fallout the process and generate 'Online Application Task'

- **THEN IF** All the evidences are verified
  - **THEN** Apply changes to all the in-Edit Evidence
    - **AND THEN** Setting the application status to 'Ready For Determination'
    - **AND THEN** Execute the Auto assessment and Authorization Process (See Enhanced Workload FDD for more information)
  - **ELSE** Fallout the process and generate 'Online Application Task'

OR

- **IF** application was submitted via Citizen Portal

- **AND IF** application was submitted from a Registered Account
  - **THEN** Execute Linking External User Process
  - **THEN** Execute Person Match Process for other case members on the application

- **AND IF** application does NOT meet one of the Fallout Criteria
  - **THEN** Execute Electronic Verification
  - **ELSE** Fallout the process and generate 'Online Application Task'

- **THEN IF** All the evidences are verified
  - **THEN** Apply changes to all the in-Edit Evidence
    - **AND THEN** Setting the application status to 'Ready For Determination'
    - **AND THEN** Execute the Auto assessment and Authorization Process (See Enhanced Workload FDD for more information)
  - **ELSE** Fallout the process and generate 'Online Application Task'

Fallout Criteria:

- Prospect Person exist

- Sensitive Application (See Citizen Portal FDD for more information)

- Completed a blank application (application was not prepopulated)

- Medical Expense record with start date greater than 3 months from application month exist

6.5 Unsubmitted Application Process (New)

The purpose of the Unsubmitted Application process is to identify applications from the Citizen Portal with status 'In Progress' and reached an age of 15, 28, or 30. On day 15 and 28, a reminder notification is sent to the user. On day 30, the application will be deleted. Once deleted, users will not have the ability to retrieve the application.

6.5.1 High Level Steps

Figure 88: Unsubmitted Application Process
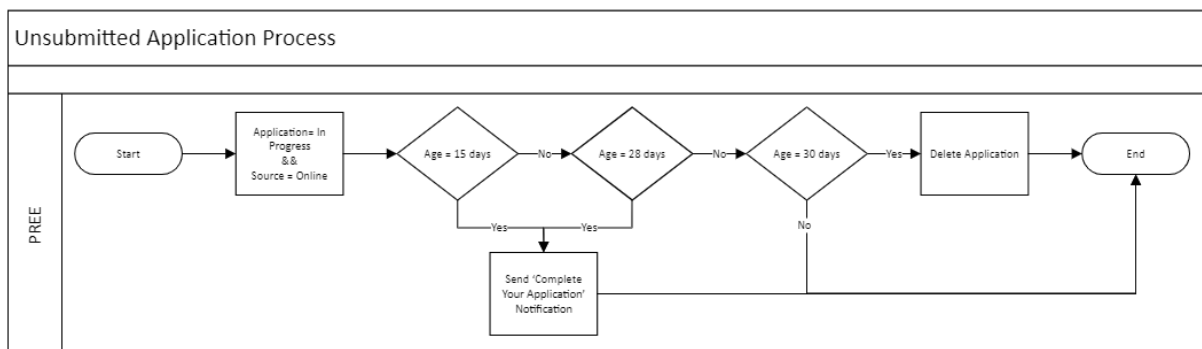
6.5.2 Predecessor

N/A

6.5.3 Successor

N/A

6.5.4 Execution Frequency

Daily.

6.5.5 Inputs

The inputs will be determined by the development team.

6.5.6 Outputs

The outputs will be determined by the development team.

6.5.7 Detailed Steps

- **IF** an application has been saved in the Citizen Portal

- **AND IF** current_date - application_create_date = 15
    - **THEN** send 'Complete Your Application' Notification
- **ELSE IF** current_date - application_create_date = 28
    - **THEN** send 'Complete Your Application' Notification
- **ELSE IF** current_date - application_create_date = 30
    - **THEN** Delete the application

6.6 <CR189> Unsubmitted COC Process (New)

The purpose of the Unsubmitted COC process is to delete COC form not submitted after X days.

6.6.1 High Level Steps

Figure 89: Unsubmitted COC Process
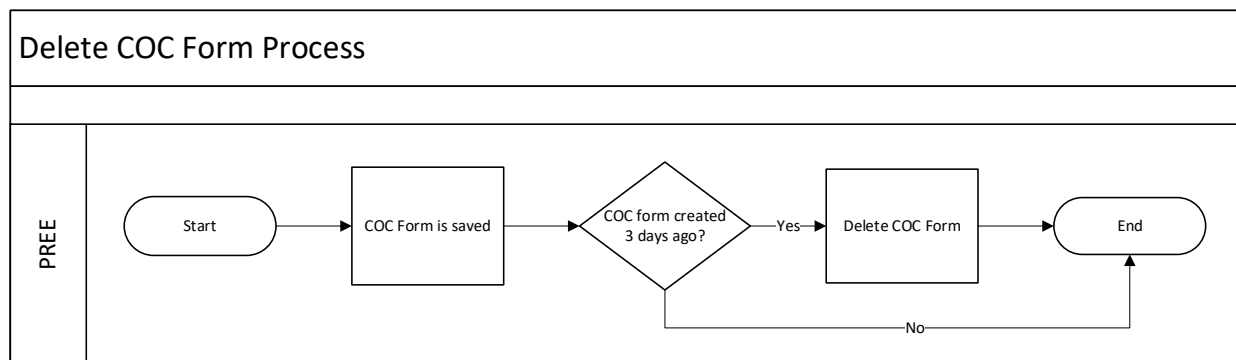
6.6.2 Predecessor

N/A

6.6.3 Successor

N/A

6.6.4 Execution Frequency

Daily

6.6.5 Inputs

The inputs will be determined by the development team.

6.6.6 Outputs

The outputs will be determined by the development team.

6.6.7   Detailed Steps

- **IF** a COC has been saved in the Citizen Portal
- **AND IF** the COC was saved 3 business days ago
- **THEN** Delete the COC

6.7   Delete Renewal Form (New)

The purpose of the Unsubmitted Renewal Form Process is to identify saved online renewal to be deleted for the following reason:

- A new member has entered the recertification period and needs to be included to the Online Renewal form
- No member is within the recertification period

6.7.1   High Level Steps

Figure 90: Delete Renewal Form Process
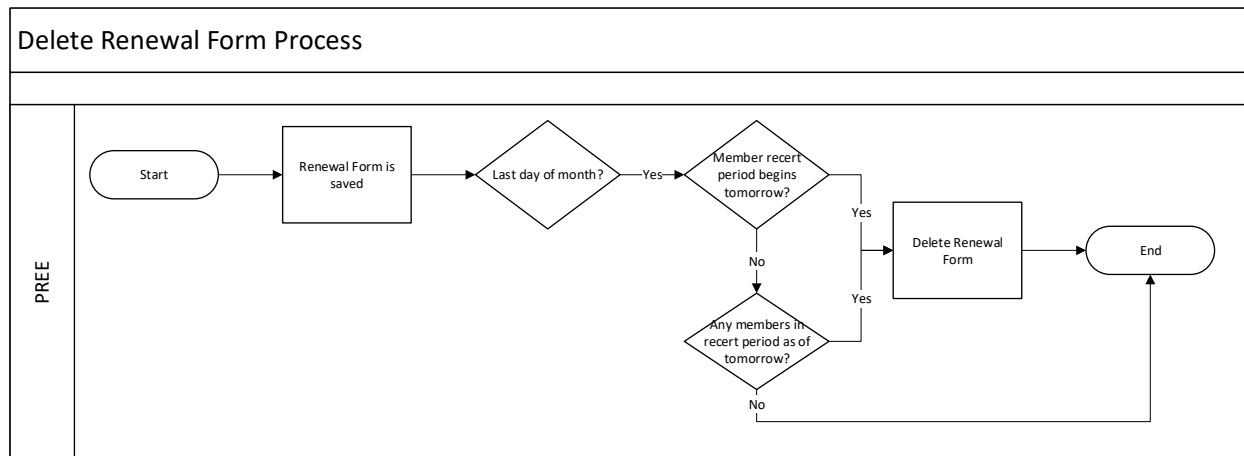
6.7.2   Predecessor

N/A

6.7.3   Successor

N/A

6.7.4   Execution Frequency

Daily.

6.7.5   Inputs

The inputs will be determined by the development team.

6.7.6 Outputs

The outputs will be determined by the development team.

6.7.7 Detailed Steps

- **IF** Renewal form has been saved in the Citizen Portal

- **AND IF** Last day of the month

- **AND IF** Another member recertification period begins tomorrow

    - **THEN** Delete renewal form

OR

- **IF** Renewal form has been saved in the Citizen Portal

- **AND IF** Last day of the month

- **AND IF** No member in recertification period as of tomorrow

    THEN Delete renewal form

6.8 New Application Case from COC/Renewal Process (New)

The purpose of this process is to systematically create an application case when a new household member was added and is requesting benefits.

6.8.1 High Level Steps

Figure 91: New Application Case from COC/Renewal Process
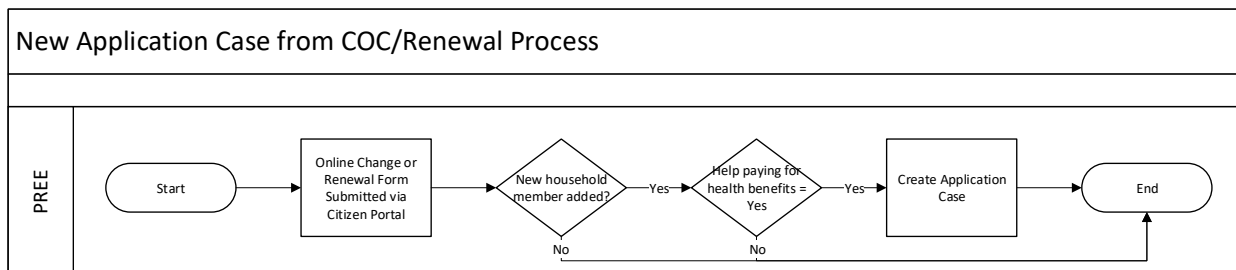
6.8.2 Predecessor

N/A

6.8.3 Successor

N/A

6.8.4 Execution Frequency

<CR189> Real-time, each time an online change or renewal form is submitted via citizen portal

6.8.5 Inputs

The inputs will be determined by the development team.

6.8.6 Outputs

The outputs will be determined by the development team.

6.8.7 Detailed Steps

- **IF** Online Change or Renewal Form Submitted via Citizen Portal

- **AND IF** New household member was added

- **AND IF** Yes was selected for help paying for health benefits for the new household member

- **THEN** Create a new Application Case on the IC associated with the External User.

6.9 Paperless Delivery Process (New)

The purpose of this process is to prevent notices from being sent by mail when the recipient has elected paperless communications.

6.9.1 High Level Steps

Figure 92: Paperless Delivery Process
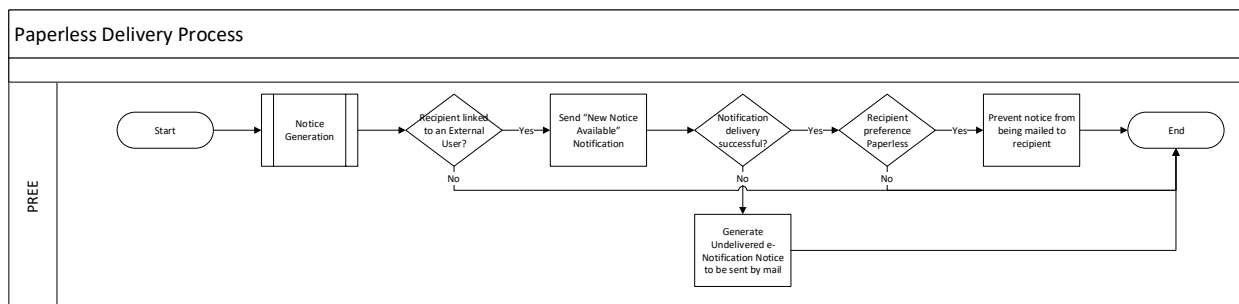
6.9.2 Predecessor

N/A

6.9.3 Successor

Central Print Notice Mailing

6.9.4 Execution Frequency

<CR189> Real-time, each time a notice is generated.

6.9.5 Inputs

The inputs will be determined by the development team.

6.9.6 Outputs

The outputs will be determined by the development team.

6.9.7 Detailed Steps

WHEN Notice is generated

- **IF** The recipient is linked to a Citizen Portal account
    - **THEN** Send 'New Notice Available Notification'
- **AND IF** Notification delivery was successful
- **AND IF** The recipient communication preference is "Electronic/Paperless"
- **THEN**
    - Prevent the notice from being picked up by the Central Print Notice Mailing
    - Set the Delivery Method to Email in the Communication Details of the Communication
    - Set the Email Address to the External User's email address in the Correspondent Details of the Communication

Note the following notices should always be sent by postal mail:

- Confirming Your Paperless Enrollment Notice
- Undelivered e-Notification Notice

7 Tasks, Alerts, Work Queues

The Tasks, Alerts, Work Queues section will provide a detailed list of all the tasks, alerts, and work queues being modified, added, or removed per the PRMP requirements associated to Online Intake Application Processing.

7.1 PSPMPR Account Link Request Task (Modify)

Table 8: PSPMPR Account Link Request Task

Task ☒   Notification ☐   Name: PSPMPR Account Link Request Task
Purpose: To notify the Caseworker a user has submitted a request to link their account with their case in PREE.
Trigger(s): The 'Link My Account' form was submitted AND was not completed systematically due to: 1. User failed Remote Identity Proofing (RIDP) 2. Exact Match not found 3. Exact Match found and Person is an active member on a single IC (only one Household Member evidence without an end date) and that IC with an active Converted Evidence

<table>
<tr><td colspan="3">4. Exact Match found and Person is an active member on multiple ICs (more than one Household Member evidence without an end date)

See Linking External User with Person Process (Modify) for more information about the process and task trigger.</td></tr>
<tr><td>Category</td><td colspan="2">Application☐ Renewal☐ COC☐ Other☒ Interface☐</td></tr>
<tr><td>Allocation Type</td><td colspan="2">Citizen☐ Position☐ Job☐ Org Unit☐ Queue☒</td></tr>
<tr><td>Allocation Strategy</td><td colspan="2">IF External User's address is in PR

    THEN place this task in the appropriate regional Work Queue based on the region of the address.

ELSE place task in regional Work Queue at random.</td></tr>
<tr><td rowspan="3">Links</td><td>Link</td><td>Yes ☒   No ☐</td></tr>
<tr><td>Primary Action Link</td><td>None</td></tr>
<tr><td>Supporting Information Link</td><td>View External User</td></tr>
<tr><td>Subject</td><td>Subject Text</td><td><External User> submitted a request to link account</td></tr>
<tr><td rowspan="6">Task Details</td><td>Deadline Strategy</td><td>Yes ☒   No ☐</td></tr>
<tr><td>Deadline Strategy Details</td><td>10 days</td></tr>
<tr><td>Escalation Strategy</td><td>N/A</td></tr>
<tr><td>Deadline Override Allowed</td><td>Yes ☐   No ☒</td></tr>
<tr><td>Task Priority</td><td>Low ☐ Medium ☒ High ☐</td></tr>
<tr><td>Manual Forwarding Allowed</td><td>Yes ☐   No ☒</td></tr>
<tr><td>Task/Notification Body Details</td><td>Message Body Text</td><td>If the person meets reason (1) <CR189> <s>and</s> OR (2), then display the following message:

    We were not able to identify <User's Name>. Please complete the Link Account</td></tr>
</table>

		process for PSPMPR user <User's username>.
		~~Person reference ID = <MPI>.~~
		<User's Name> provided <MPI> as their Reference Number.
		If the person meets reason (3), then display the following message:
		<User's Name> was identified to be person reference ID <Person ID>, however is an active member on a converted case. Please resolve the converted case issue, then complete the Link Account process for PSPMPR user <User's username>.
		If the person meets reason (4), then display the following message:
		<User's Name> was identified to be person reference ID <Person ID>, however is an active member on multiple cases. Please resolve the multiple case issue, then complete the Link Account process for PSPMPR user <User's username>.

Other special processing instructions:

<User's Name> = Display the user's full name, not the User's username

<User's username>

<MPI> = Display the MPI entered in the form. If left blank, then do not display. ~~display "was not provided".~~

7.2 Online Application Task (Modify)

The Online Application Task is being modified to support the No Touch process. This task will no longer be triggered when an application is submitted. It will only trigger for the applications that failed the no touch process.

Table 9: Online Application

Task ☒   Notification ☐   Name: Online Application Task
Purpose: To notify the Caseworker that an application has been submitted within the Citizen Portal

7.3 Trigger(s): As indicated in the Linking External User with Person Process (Modify) and Finalizing Linking and Unlinking Process (Modify)

The purpose of the 'Finalizing Linking' process is to set the External User account with the correct account type. When a Person is added as a Linked Participant, the External User Account Type should be set to Linked. Similar, when the Person is removed, then the External User Account Type should be set to Registered.

7.3.1 High Level Steps

Figure 85: Finalizing Linking and Unlinking Process <CR189>
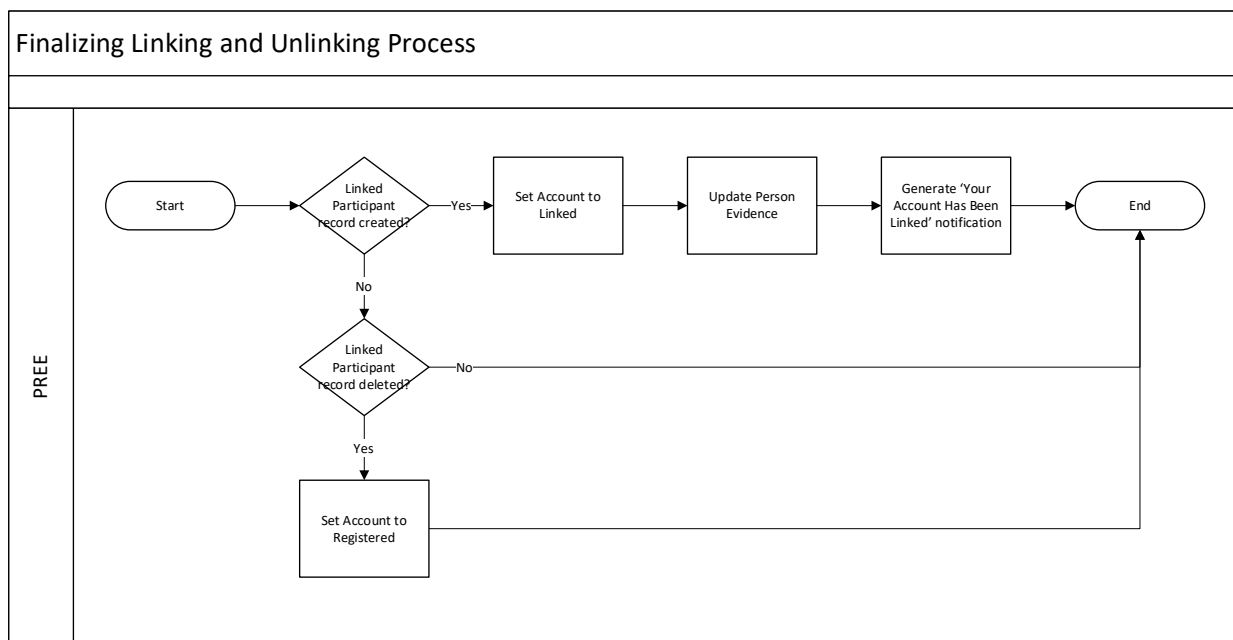
7.3.2 Predecessor

Linking External User with Person Process (Modify)

7.3.3 Successor

No Touch Online Application Process (Modify)

7.3.4 Execution Frequency

<CR189> Real-time Every time one of the following events occurs:

- ~~When triggered by Nightly,~~ After Linking External User with Person Process (Modify)

- When a caseworker creates a new Linked Participant record on the External User profile

- When a caseworker removes a Linked Participant record on the External User profile

7.3.5 Inputs

The inputs will be determined by the development team.

7.3.6 Outputs

The outputs will be determined by the development team.

7.3.7 Detailed Steps

- **IF** A Linked Participant record of type Person is added to the External User profile

  - ♦ **THEN** Set the External User Account Type to Linked **AND** Update Person's evidence **AND** Generate 'Your Account Has Been Linked' notification. ~~as need~~. See table below.

- **ELSE IF** A Linked Participant record of type Person was deleted the External User profile

- **THEN** Set the External User Account Type to Registered

Table 7: Person Evidence Updates

External User Data		Person Evidences		Comments
Your Settings	**Data**	**Evidence**	**Field: Data**	
Email Addresses	\<email\>	Email	**Email Address**: \<email\> **Type**: Personal **Preferred**: Yes	If evidence exist with same email address, then update evidence. Else, create new evidence
Cell phone number	\<number\>	Phone Number	**Phone Number**: \<number\> **Phone Type**: Mobile **Preferred**: Yes	If evidence exist with same number, then update evidence. Else, create new evidence

Language	<language>	Contact Preferences	**Preferred Language**: <language>	If evidence exist, then update evidence. Else, create new evidence
Paperless	Yes	Contact Preferences	**Preferred Communication**: Electronic/ Paperless	If evidence exist, then update evidence. Else, create new evidence
Paperless	No	Contact Preferences	**Preferred Communication**: Hard Copy	If evidence exist, then update evidence. Else, create new evidence

7.4 Defining External User Privilege Process (New)

The purpose of the 'External User Privilege' process is to support Table 3: User Account and Functionality Mapping by identifying the External User privilege each time the user logs in per the defined variables:

- Account Type

- ID Proofing

- User Role

- Identified IC

7.4.1 High Level Steps

Figure 86: Defining External User Privilege Process
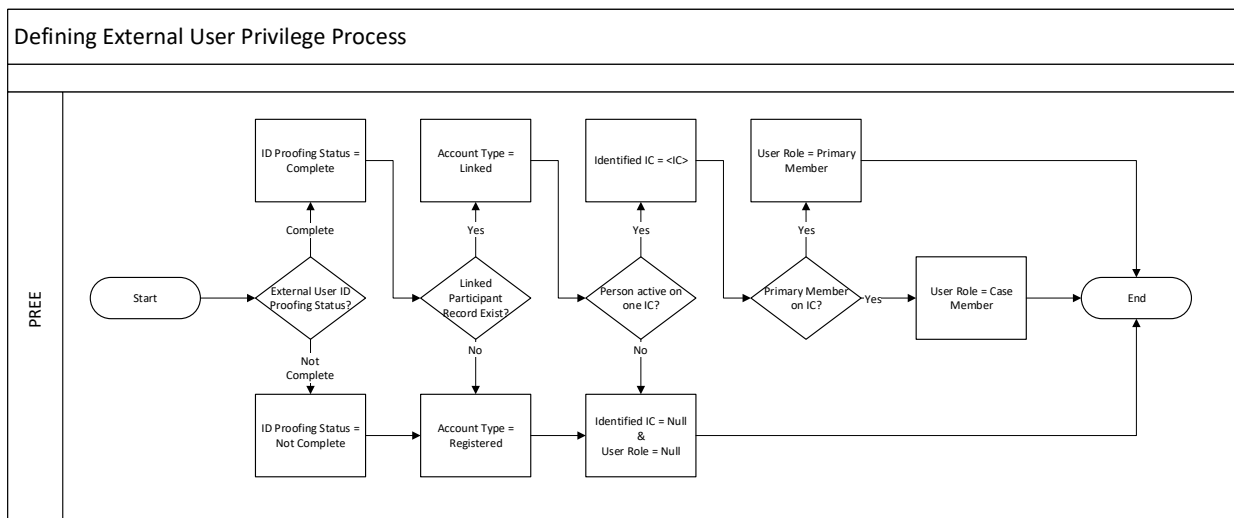
7.4.2 Predecessor

N/A

7.4.3 Successor

N/A

7.4.4 Execution Frequency

<CR189> Real-time, every time a user successfully logs into their account.

7.4.5 Inputs

The inputs will be determined by the development team.

7.4.6 Outputs

The outputs will be determined by the development team.

7.4.7 Detailed Steps

- **IF** External User ID Proofing Status is Complete

  - **THEN** IDProofingStatus = Complete
  - **ELSE** IDProofingStatus = Not Complete **AND** AccountType = Registered, IdentifiedIC = null **AND** UserRole = null

- **THEN IF** Participant Record exist for External User

  - **THEN** AccountType = Linked
  - **ELSE** AccountType = Registered

- **THEN IF** Person (Linked Participant) is on an active member on a single IC (number of Household Member Evidence without an end date = 1)

  - **THEN** IdentifiedIC = <Person's IC>
  - **ELSE** IdentifiedIC = Null **AND** UserRole = Null

- **THEN IF** Person (Linked Participant) is the Primary Member on the IdentifiedIC

  - **THEN** UserRole = Primary Member
  - **ELSE** UserRole = Case Member

No Touch Online Application Process (Modify) processes.

Allocation Type	No Changes	
Allocation Strategy	No Changes	
Links	Link	No Changes
	Primary Action Link	No Changes
	Supporting Information Link	No Changes
Subject	Subject Text	No Changes
Task Details	Deadline Strategy	No Changes
	Deadline Strategy Details	No Changes
	Escalation Strategy	No Changes
	Deadline Override Allowed	No Changes
	Task Priority	No Changes
	Manual Forwarding Allowed	No Changes
Task/Notification Body Details	Message Body Text	An application has been submitted for <Primary Applicant Name>within the Citizen Portal by <External User's Name>.

		<Sensitive Applicant Snippet>
		<Medical Expense Snippet>
		<CR189> <Authorization Issue Snippet>

Other special processing instructions:
Include the <Medical Expense Snippet> snippet when the includes a Medical Expense with a start date greater than 3 months and less than 16 months from the application date.   **Medical Expense Snippet:** This application contains a medical expense that is older than 3 months. Please follow up with the applicant to verify the information on the case is accurate for that given period to ensure proper evaluation of benefits.   Include the <Authorization Issue Snippet> snippet when an applicant eligibility decision cannot be authorized.   **Authorization Issue Snippet:** <Applicant name> decision could not be authorized. <Error message>

7.5 Online COC Task (Modify)

Table 10: Online COC

Task ☒ Notification ☐ Name: Online COC Task		
Purpose: To notify the Caseworker that a COC was reported and submitted via the Citizen Portal.		
Trigger(s): When a COC Form was submitted within the Citizen Portal.		
Category	Application☐ Renewal☐ COC☒ Other☐ Interface☐	
Allocation Type	Citizen☐ Position☐ Job☐ Org Unit☐ Queue☒	
Allocation Strategy	**IF** Primary Applicant's residential address is in PR **THEN** place this task in the appropriate regional Work Queue based on the region of the residential address. **ELSE** place task in regional Work Queue at random.	
Links	Link	Yes ☒ No ☐
	Primary Action Link	None

	Supporting Information Link	View External User View IC View Application (only if a new applicant was added)
Subject	Subject Text	Online COC submitted for <IC>
Task Details	Deadline Strategy	Yes ☒ No ☐
	Deadline Strategy Details	10 days
	Escalation Strategy	N/A
	Deadline Override Allowed	Yes ☐ No ☒
	Task Priority	Low ☐ Medium ☒ High ☐
	Manual Forwarding Allowed	Yes ☐ No ☒
Task/Notification Body Details	Message Body Text	A change was reported for <IC#> within the Citizen Portal by <External User Name>. <New Applicant Snippet>

Other special processing instructions:

Include the <New Applicant> snippet when a new household member was added and is applying for benefits.

- ▪ **New Applicant Snippet:** A new applicant was also added to the case. Please view Application <Application #> and process the application along with the changes reported. Once processed, return to the case to complete the change process.

7.6 Online Renewal Task (Modify)

Table 11: Online Renewal

Task ☒   Notification ☐   Name: Online Renewal Task
Purpose: To notify the Caseworker that a Renewal Form was completed and submitted via the Citizen Portal.

Trigger(s): When a Renewal Form was submitted within the Citizen Portal.		
Category	Application☐ Renewal☒ COC☐ Other☐ Interface☐	
Allocation Type	Citizen☐ Position☐ Job☐ Org Unit☐ Queue☒	
Allocation Strategy	**IF** Primary Applicant's residential address is in PR **THEN** place this task in the appropriate regional Work Queue based on the region of the residential address. **ELSE** place task in regional Work Queue at random.	
Links	Link	Yes ☒ No ☐
	Primary Action Link	**None**
	Supporting Information Link	View External User View IC View Application (only if a new applicant was added)
Subject	Subject Text	Online Renewal Form completed for <IC>
Task Details	Deadline Strategy	Yes ☒ No ☐
	Deadline Strategy Details	10 days
	Escalation Strategy	N/A
	Deadline Override Allowed	Yes ☐ No ☒
	Task Priority	Low ☐ Medium ☒ High ☐
	Manual Forwarding Allowed	Yes ☐ No ☒
Task/Notification Body Details	Message Body Text	A Renewal Form was completed within the Citizen Portal by <External User Name> for: <List all the members in the recert period> <New Applicant Snippet>

Other special processing instructions:

Include the <New Applicant> snippet when a new household member was added and is applying for benefits.

- **New Applicant Snippet:** A new applicant was also added to the case. Please view Application <Application #> and process the application along with the changes reported. Once processed, return to the case to complete the renewal process.

8 Notifications

The Notifications section will provide a detailed list of all the notifications being modified, added, or removed per the PRMP requirements associated to the Online COC FDD. Each notification will be available in English and in Spanish. The language to include on the notice will be based:

- Registered Accounts: on the External User's communication language preference.
- Linked Accounts: on the Person's preferred language preference selected on the Contact Preferences evidence.

Notifications can be sent using either by email, SMS text message, or both. -<Pending Decision EE-DL00271>

8.1 Complete Your Application Form Notification (New)

The Complete Your Application Form Notification is a communication that will be sent when the user has an in-progress application form on the Citizen Portal for 15 or 28 days after the application was first created.

8.1.1 Generation Details

See Unsubmitted Application Process (New) for generation details

8.1.2 Layout

Figure 93: Complete Your Application Notification

English Verbiage	Subject:	Complete Your Application for the Government Health Plan
	Body:	Your application for the Government Health Plan has not been submitted. The application will be automatically deleted if it is not submitted by <date_deleted>. To resume your application, please log in to PSPMPR at https://solicitamedicaid.salud.gov.pr/.
Spanish Verbiage	Subject:	Complete su Solicitud para el Plan de Salud del Gobierno
	Body:	Su solicitud para el Plan de Salud del Gobierno no ha sido sometida. La solicitud se eliminará automáticamente si no es sometida en o antes de <date_deleted>. Para reanudar su solicitud, inicie sesión en https://solicitamedicaid.salud.gov.pr/.

8.1.3 Expected Values

#	Value	Attribute	Comments
1	<date_deleted>	The date on which the application/renewal will be automatically deleted.	See Unsubmitted Application Process (New) for details

8.2 Change Reported Notification (New)

The Change Reported Notification is a communication that will be sent when the citizen submits a COC from the Citizen Portal.

8.2.1 Generation Details

Figure 94: Change Reported Notification

Change Reported Notification Process

Notification Generation: Start → User submits a change through Citizen Portal → Generate Change Reported Notification → Send notification by preferred method → End
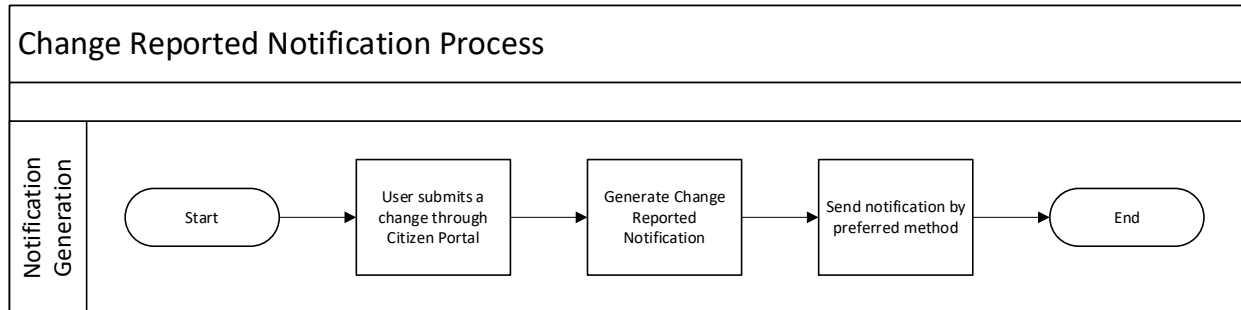
8.2.2 Layout

English Verbiage	Subject:	Change Reported
	Body:	We have received your reported change. Once the change has been processed, you will receive a Notice of Decision. We will contact you if further information is needed.
Spanish Verbiage	Subject:	Cambio Notificado
	Body:	Hemos recibido su notificación de cambio. Una vez se haya procesado, recibirá un Aviso de Decisión. De necesitar información adicional nos comunicaremos con usted.

8.2.3 Expected Values

N/A

8.3 Renewal Form Submitted Notification (New)

The Renewal Submitted Notification is a communication that will be sent when the citizen has submitted a renewal application using their Citizen Portal account.

8.3.1 Generation Details

Figure 95: Renewal Form Submitted Notification

Renewal Form Submitted Notification Process
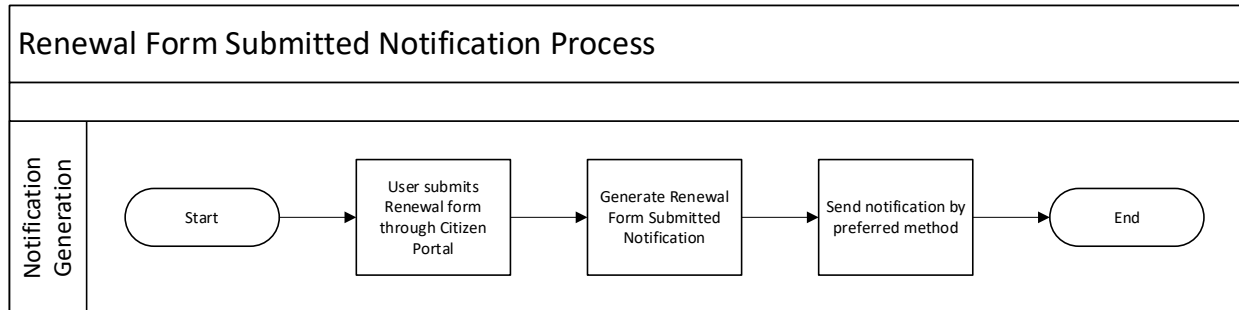
8.3.2 Layout

English Verbiage	Subject:	Renewal Form for the Government Health Plan
	Body:	We have received your Renewal Form for the Government Health Plan. Once your Renewal Form has been processed, you will receive a Notice of Decision. We will contact you if further information is needed.
Spanish Verbiage	Subject:	Formulario de Renovación para el Plan de Salud del Gobierno
	Body:	Hemos recibido su Formulario de Renovación para el Plan de Salud del Gobierno. Una vez que su Formulario de Renovación haya sido procesado, recibirá un Aviso de Decisión. De necesitar información adicional nos comunicaremos con usted.

8.3.3 Expected Values

N/A

8.4 Communication Setting Updated Notification (New)

The Communication Setting Updated Notification is a communication that will be sent to each person when contact information (email address or phone number) has been changed for an account on the Citizen Portal. This notice will be sent to both the original and the new address or phone number.

8.4.1 Generation Details

Figure 96: Communication Setting Updated Notification <CR189>
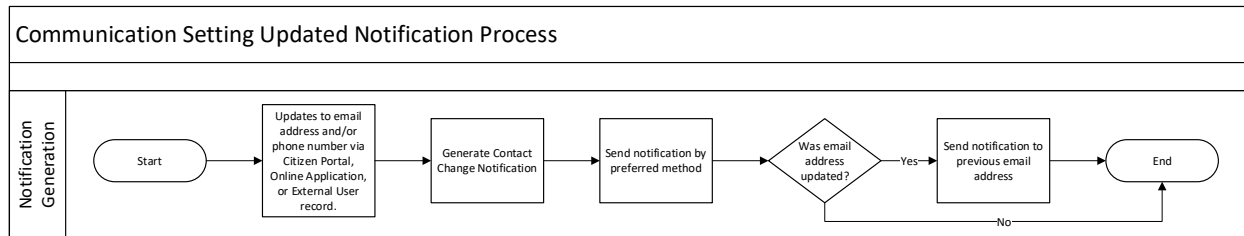
8.4.2 Layout

English Verbiage	Subject:	Communication Setting Updated
	Body:	We have updated your communication setting for your online account with PSPMPR. The new <contactDescription> is: <contactInformation>
Spanish Verbiage	Subject:	Configuración de Comunicaciones Actualizada
	Body:	Hemos actualizado la Configuración de Comunicaciones para su cuenta en línea con PSPMPR. El nuevo <contactDescription> es: <contactInformation>

8.4.3 Expected Values

#	Value	Attribute	Comments
1	<contactDescription>	Contact Description options: "email address" "cellphone number" "contact language"	If multiple changes were updated in one setting, then consolidate the message to one notification.
2	<contactInformation>	The new email address, phone number, and/or contact language entered on the Your Settings page.	

8.5 Confirming Your Paperless Enrollment Notification (New)

The Confirming Your Paperless Enrollment Notification is a communication that will be sent to inform the citizen that they will not be receiving Notices by postal mail. Notices will be available via the Citizen Portal and they can choose to opt back in. They can also request a notice to be sent by mail via the Citizen Portal.

8.5.1 Generation Details

Figure 97: Confirming Your Paperless Enrollment Notification

Confirming Your Paperless Enrollment Notification Process

Notification Generation

Start → User selects paperless communications in Citizen Portal → Generate Confirming Your Paperless Enrollment Notification → Send notification by preferred method → End

8.5.2 Layout

English Verbiage	Subject:	Confirming Your Paperless Enrollment
	Body:	You have been successfully enrolled in paperless communications from the Government Health Plan/Medicaid Program. We'll notify you when you have something new to view. Then, just log in to PSPMPR at https://solicitamedicaid.salud.gov.pr/ and select 'Notices' to view your notices. We'll still mail you some letters that aren't available electronically. To view or change your paperless preferences, please log in to PSPMPR at https://solicitamedicaid.salud.gov.pr/.
Spanish Verbiage	Subject:	Confirmación de su Inscripción a Comunicaciones No Impresas
	Body:	Usted ha sido inscrito con éxito para recibir comunicaciones no impresas del Plan de Salud del Gobierno/Programa Medicaid. Le notificaremos cuando tenga algún nuevo Aviso que ver. A continuación, inicie una sesión en PSPMPR en https://solicitamedicaid.salud.gov.pr/ y seleccione "Avisos" para ver sus avisos. Aunque se encuentre inscrito en el formato de comunicaciones no impresas, todavía le enviaremos algunas cartas que no están disponibles electrónicamente. Para ver o cambiar su preferencia, no impresa, inicie una sesión en PSPMPR en https://solicitamedicaid.salud.gov.pr/.

8.5.3 Expected Values

N/A

8.6 Your Account Has Been Linked Notification (New)

The 'Your Account Has Been Linked' notification is a communication that will be sent to inform the user their request to link their account with their case has been completed.

8.6.1 Generation Details

Figure 98: Your Account Has Been Linked Notification

8.6.2 Layout

English Verbiage	Subject:	Your Account Has Been Linked
	Body:	We were able to link your account. Now you will be able to: - View the status of your coverage - Renew you benefits - Report changes - Upload supporting documents - View notices - View upcoming appointments To view your information, please log in to PSPMPR at https://solicitamedicaid.salud.gov.pr/.
Spanish Verbiage	Subject:	Su Cuenta Ha Sido Vinculada
	Body:	Hemos podido vincular su cuenta. Ahora usted será capaz de: - Ver el estado de su cubierta - Recertificar sus beneficios - Notificar cambios - Cargar documentos de soporte - Ver avisos - Ver próximas citas Para ver su información, inicie una sesión en PSPMPR en https:-//solicitamedicaid.salud.gov.pr/.

8.6.3 Expected Values

N/A

8.7 Unsuccessful Link My Account Request (New)

The 'Unsuccessful Link My Account Request' notification is a communication that will be sent to inform the user their request to link their account with their case has been completed.

8.7.1 Generation Details

Figure 99: Unsuccessful Link My Account Request Notification

Unsuccessful Link My Account Request Notification Process
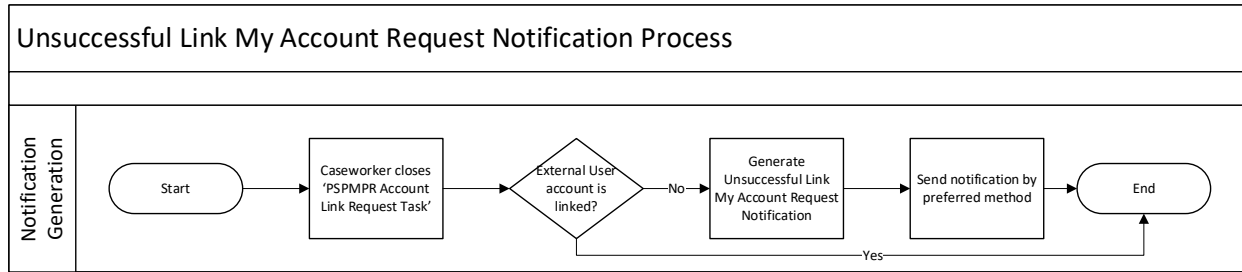
8.7.2 Layout

English Verbiage	Subject:	Unsuccessful Link My Account Request
	Body:	We were not able to link your account. If you still wish to have you account link, please call to schedule an appointment with Medicaid Program Call Center at Tel. (787) 641-4224 / TTY (787) 625-6955 Monday to Friday from 8:00 am to 6:00 pm.
Spanish Verbiage	Subject:	Solicitud infructuosa para vincular Mi Cuenta
	Body:	No nos fue posible vincular su cuenta. Si todavía desea tener su cuenta vinculada, llame al "Call Center" del Programa Medicaid al Tel. (787) 641-4224 / TTY (787) 625-6955 de lunes a viernes de 8:00 am a 6:00 pm para programar una cita.

8.7.3 Expected Values

N/A

8.8 Rejected Document Notification (New)

The 'Rejected Document' notification is a communication that will be to inform the user a submitted document was rejected.

8.8.1 Generation Details

Figure 100: Rejected Document Notification
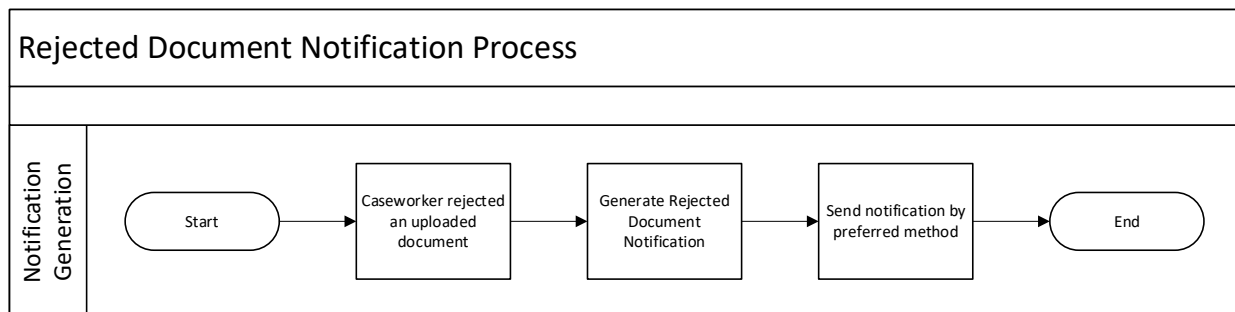
8.8.2 Layout

English Verbiage	Subject:	Rejected Document
	Body:	The document submitted to verify <Verification Item> was rejected. To upload a new document, just log in to PSPMPR at https://solicitamedicaid.salud.gov.pr/ and click on 'Documents'.
Spanish Verbiage	Subject:	Documento Rechazado
	Body:	El documento sometido como verificación de <Elemento de verificación> fue rechazado. Para cargar un nuevo documento, simplemente inicie sesión en PSPMPR en https://solicitamedicaid.salud.gov.pr/ y presione "Documentos".

8.8.3 Expected Values

N/A

8.9 New Notice Available Notification (Modify)

The New Notice Available Notification will be sent each time a new notice is available on the Citizen Portal.

8.9.1 Generation Details

Figure 101: New Notice Available Notification
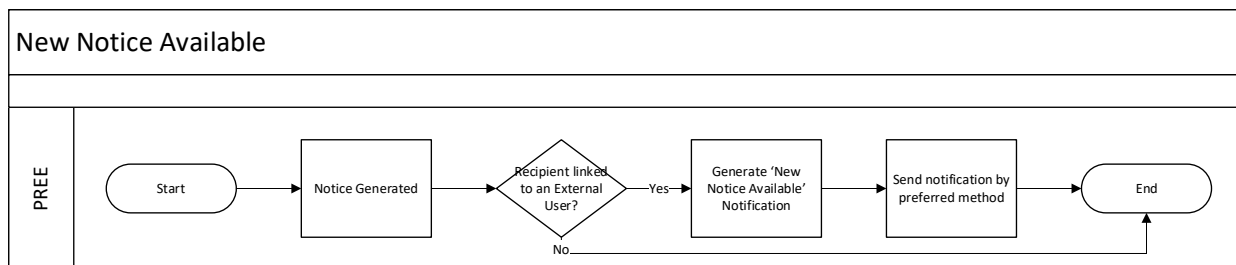
8.9.2 Layout

English Verbiage	Subject:	New Notice Available
	Body:	A new notice is available on PSPMPR. To view or download your notice, just log in to PSPMPR at https://solicitamedicaid.salud.gov.pr/ and click on 'Notices'.
Spanish Verbiage	Subject:	Nuevo Aviso Disponible
	Body:	Hay un nuevo aviso disponible en PSPMPR. Para ver o descargar su aviso, simplemente inicie una sesión en PSPMPR en https://solicitamedicaid.salud.gov.pr/ y presione 'Avisos'.

8.9.3 Expected Values

N/A

8.10 New Account Notification (Modify)

The New Account Notification is a notification that will be sent to each person when he/she has successfully created a new account on the Citizen Portal. <Pending Decision EE-DL00271>

8.10.1 Generation Details

Figure 102: New Account Notification <CR189>

8.10.2 Layout

English Verbiage	Subject:	Welcome to \<CitizenPortalNameEnglish\>
	Body:	Welcome \<Person's First Name\>, Thank you for creating an online account with \<CitizenPortalNameEnglish\>. Your login details are: Username: \<username\> You can now view the status of your online application, view your notices, and much more when you log in to your PSPMPR account.
Spanish Verbiage	Subject:	Bienvenido a \<CitizenPortalNameSpanish\>
	Body:	Bienvenido \<Person's First Name\>, Gracias por crear una cuenta en línea en el \<CitizenPortalNameSpanish\>. Sus detalles de login son: Usuario: \<username\> Ahora puede ver el estado de su solicitud en línea, ver sus avisos y mucho más cuando inicie su sesión en su cuenta en el PSPMPR.

8.10.3 Expected Values

#	Value	Attribute	Comments
1	\<Person's First Name\>	First name entered on the 'Sign up' page	
2	\<username\>	Username entered on the 'Sign up' page	

8.11 Username Recovery Notification (Modify)

The Username Recovery Notice is a notice that will be sent when the citizen submits a request from the 'Retrieve your username' page on the Citizen Portal. <Pending Decision EE-DL00271>

8.11.1 Generation Details

Figure 103: Username Recovery Notice
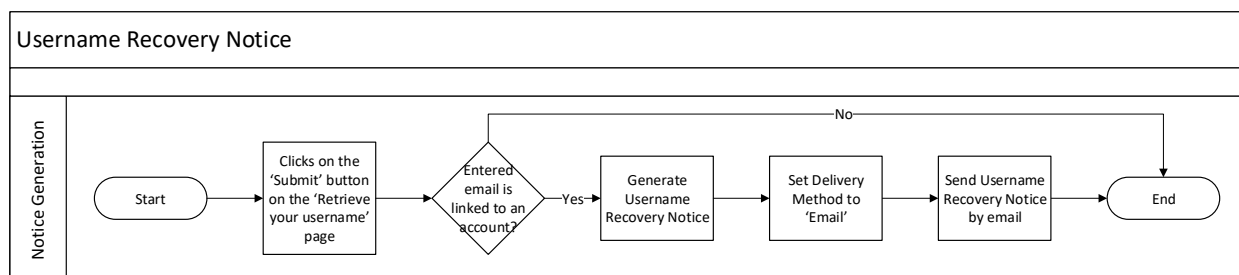
8.11.2 Layout

English Verbiage	Subject:	Username Recovery
	Body:	You have requested your log in details. Your login details are: Username: <username> We advise that you change your password the next time you log in to your PSPMPR account.
Spanish Verbiage	Subject:	Recuperación de Su Usuario
	Body:	Ha solicitado sus datos de log in. Sus datos de login son: Usuario: <username> Le recomendamos que cambie su contraseña la próxima vez que haga log in a su cuenta en PSPMPR.

8.11.3 Expected Values

#	Value	Attribute	Comments

1	<username>	Username linked to the email address entered on the 'Retrieve your username' page	

8.12 Password Reset Notification (Modify)

The Password Reset Notice is a notice that will be sent when the citizen successfully reset their password to their Citizen Portal account. <Pending Decision EE-DL00271>

8.12.1 Generation Details

Figure 104: Password Reset Notice
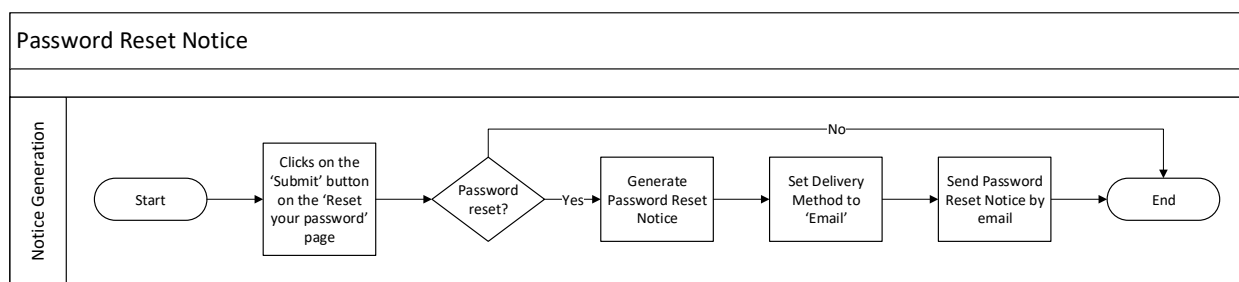
8.12.2 Layout

English Verbiage	Subject:	Password Changed
	Body:	Per your request, the password for your PSPMPR account has been changed.
Spanish Verbiage	Subject:	Contraseña Cambiada
	Body:	Según solicitado, se ha cambiado la contraseña de su cuenta en PSPMPR.

8.12.3 Expected Values

N/A

8.13 Application Submission Notification (Modify)

The Application Submission Notice is a notice that will be sent when the citizen submits an application on the Citizen Portal. <Pending Decision EE-DL00271>

8.13.1 Generation Details

Figure 105: Application Submission Notice

Application Submission Notice
Notice Generation: Start → Clicks on the 'Next' button on the 'Submission Summary' page → Generate Application Submission Notice → Set Delivery Method to 'Email' → Send Application Submission Notice by email → End

8.13.2 Layout

English Verbiage	Subject:	Application for the Government Health Plan
	Body:	We have received your Application for the Government Health Plan. The status of this application is 'Pending Decision'. We will contact you when the application has been processed. Please note your application reference is **<ApplicationReferenceNum>**. To view or download a copy of your application, log in to your PSPMPR account.
Spanish Verbiage	Subject:	Solicitud para el Plan de Salud del Gobierno
	Body:	Hemos recibido su solicitud para el Plan de Salud del Gobierno. El estado de esta solicitud es 'En espera de decisión'. Nos comunicaremos con usted cuando la solicitud haya sido procesada. Tenga en cuenta que el número de referencia de su solicitud es **<ApplicationReferenceNum>.** Para ver o descargar una copia de su solicitud, haga log in en su cuenta del PSPMPR.

8.13.3 Expected Values

#	Value	Attribute	Comments

1	<ApplicationReferenceNum>	The application reference number	

9 <CR-131> Notices

The Notices section will provide a detailed list of all the notifications and notices being modified, added, or removed per the PRMP requirements associated to Citizen Portal FDD. Each will be available in English and in Spanish. The language to include on the notice will be based on the user's communication language preference selected on the 'Sign up' page. Notifications will be sent using either email or SMS text message, therefore both formats will be included.

9.1 Request for Information Notice (Modify)

The Request for Information Notice will be modified to include a new snippet to inform the client about uploading the requested documents on the citizen portal.

9.1.1 Expected Values

The new 'Upload Documents on PSPMPR' snippet is located in:

Document	Tab Name
SNIPPETS – Online COC.xlsx	RFI_Expected_Values

9.2 Renewal Notice (Modify)

The Renewal Notice will be modified to 'Renewal Statement' snippet to inform the client about their option to complete the renewal form online.

9.2.1 Expected Values

The modified 'Renewal Statement' snippet is located in:

Document	Tab Name
SNIPPETS – Online COC.xlsx	Renewal_Expected_Values

9.3 Confirming Your Paperless Enrollment Notice (New)

The Confirming Your Paperless Enrollment Notice is a new notice to inform the citizen that they elected to not receive notices by mail.

9.3.1 Description of the Confirming Your Paperless Enrollment

The Confirming Your Paperless Enrollment Notice is a communication that will be sent by postal mail to inform the citizen that they will not be receiving Notices by mail in the future. Notices will be available via the Citizen Portal and they can choose to opt back in. They can also request a notice to be sent by mail via the Citizen Portal.

9.3.2 Generation Details of the Confirming Your Paperless Enrollment

Generate this notice and always sent it by postal mail when the following event occurs:

- User elected to receive paperless communication from their Settings page.

9.3.3 Layout of the Confirming Your Paperless Enrollment

9.3.4 Expected Values of the Confirming Your Paperless Enrollment

#	Description	Comments
1	Case Number	
2	Letter Date: <DD Month YYYY>	
3	Address Barcode	
4	Case's Contact Person's First Name Middle Name First Last Name Second Last Name	
5	Address Line 1	
6	Address Line 2	
7	City	
8	State	
9	Zip	

#		
~~10~~	~~<Title>~~	~~See tab 'Papaerless_Expected_Values' for snippet in SNIPPETS - Online COC.xlsx~~
~~11~~	~~<Paperless Enrollment>~~	~~See tab 'Papaerless_Expected_Values' for snippet in SNIPPETS - Online COC.xlsx~~
~~12~~	~~Signature Block~~	
~~13~~	~~Signature Block Slogan~~	

9.4 ~~Undelivered e-Notification Notice (New)~~

~~The Undelivered e-Notification Notice is a notice to inform the citizen when a notification delivery was unsuccessful.~~

9.4.1 ~~Description of the Undelivered e-Notification Notice~~

~~The Undelivered e-Notification Notice is a communication that will be sent by postal mail to inform the user a notification was sent, but unsuccessful. Instructions on how to correct their communication method and the undelivered message.~~

9.4.2 ~~Generation Details of the Undelivered e-Notification Notice~~

~~Generate this notice and always sent it by postal mail when the following event occurs:~~

- ~~A notification was undelivered.~~
- ~~User account is linked.~~
- ~~This notice has not already been sent for the undelivered email address or phone number <Pending Decision EE-DL00271>. This notice should only be sent one per undelivered email address and phone number.~~

9.4.3 ~~Layout of the Undelivered e-Notification Notice~~

9.4.4 ~~Expected Values of the Undelivered e-Notification Notice~~

~~#~~	~~Description~~	~~Comments~~
~~1~~	~~Case Number~~	

2	Letter Date: <DD Month YYYY>	
3	Address Barcode	
4	Case's Contact Person's First Name Middle Name First Last Name Second Last Name	
5	Address Line 1	
6	Address Line 2	
7	City	
8	State	
9	Zip	
10	<Title>	See tab 'Undelivered_Notification' for snippet in SNIPPETS - Online COC.xlsx
11	<Undelivered Notification Snippet>	See tab 'Undelivered_Notification' for snippet in SNIPPETS - Online COC.xlsx
12	<Undelivered Notification>	Include the undelivered message
13	Signature Block	
14	Signature Block Slogan	

9.5   Citizen Portal Announcement Notice (New)

The Citizen Portal Announcement Notice is a notice that informs the client about the Citizen Portal and instructions on how to set up an account.

9.5.1   Description of the Citizen Portal Announcement

The Citizen Portal Announcement Notice is a communication that will be sent by postal mail together with the first notice mailed to a client after the Citizen Portal is updated in the stabilization release. It includes information about the Citizen Portal, its features and benefits, and instructions on how to set up an account.

9.5.2 Generation Details of the Citizen Portal Announcement

Generate this notice when the following event occurs:

- A new notice was generated.

- Recipient of the new notice is not linked to an External User.

- The Citizen Portal Announcement Notice has not been sent to this recipient (send notice ones).

9.5.3 Layout of the Citizen Portal Announcement

9.5.4 Expected Values of the Citizen Portal Announcement

#	Description	Comments
1	Case Number	
2	Letter Date: <DD Month YYYY>	
3	Address Barcode	
4	Case's Contact Person's First Name Middle Name First Last Name Second Last Name	
5	Address Line 1	
6	Address Line 2	
7	City	
8	State	
9	Zip	
10	<Title>	See tab 'Citizen Portal Announcement' for snippet in SNIPPETS - Online COC.xlsx
11	<Citizen Portal Announcement>	See tab 'Citizen Portal Announcement' for snippet in SNIPPETS - Online COC.xlsx
12	Signature Block	
13	Signature Block Slogan	

9.6 Welcome to PSPMPR Notice (New)

The Welcome to PSPMPR Notice is a notice that includes the username and a temporary password when the account was created by the caseworker.

9.6.1 Description of the New PSPMPR Account with Temporary Password

The New PSPMPR Account with Temporary Password Notice is a communication that will be handed to the citizen by a caseworker who has created a Citizen Portal account for them. It includes the username and a temporary password which can be used to access the account in order to create a permanent password.

Note that this notice should never be sent by mail or to the Citizen Portal.

9.6.2 Generation Details of the New PSPMPR Account with Temporary Password

Generate this notice and never send it by postal mail or make it available in the Citizen Portal when the following event occurs:

- Caseworker created a new user account using 'New PSPMPR Account' from action menu of the Person page. See New PSPMPR Account for more information.

9.6.3 Layout of the New PSPMPR Account with Temporary Password

9.6.4 Expected Values of the New PSPMPR Account with Temporary Password

#	Description	Comments
1	Case Number	
2	Letter Date: <DD Month YYYY>	
3	Address Barcode	
4	Case's Contact Person's First Name Middle Name First Last Name Second Last Name	
5	Address Line 1	

6	~~Address Line 2~~	
7	~~City~~	
8	~~State~~	
9	~~Zip~~	
10	~~<Title>~~	~~See tab 'Welcome_to_PSPMPR' for snippet in SNIPPETS - Online COC.xlsx~~
11	~~< New Account Information>~~	~~See tab 'Welcome_to_PSPMPR' for snippet in SNIPPETS - Online COC.xlsx~~
12	~~Signature Block~~	
13	~~Signature Block Slogan~~	

10 Development Considerations

The Development Considerations section contains additional information for the development team to take into consideration during the development phase of the project.

No Development Considerations have been identified for the Online COC Citizen Portal FDD.

11 Training Considerations

11.1 Manual PSPMPR Account Linking Process

The 'Linking a Person to an External User' process needs to be updated to include an online link request. Also, we need to determine what the caseworker should do when they cannot find the person in PREE or are not sure which Person case to link to the External User (multiple possible matches). When linking a person (in person or online request) the caseworker will need to:

- Check if the Person is an active member on a single IC. Persons active on multiple cases will not have access to prepopulated forms. Therefore, the caseworker needs to identify which case is the correct case and end date the Household Member evidence on the other case(s).

- Check if the Person's case is a converted case. If so, caseworker should work on resolving the Converted Case.

12 Reporting Considerations

This section is not applicable for Online Change of Circumstances FDD.

13 Use Cases and Scenarios

This section contains Use Cases and Scenarios associated to the Citizen Portal FDD. Use Cases describe the high-level processes to complete an activity. Scenarios will be used to validate the modifications made within the Citizen Portal FDD.

13.1 Use Case 1: Complete a blank online application

13.1.1 Description

Citizen wants to submit an application.

13.1.2 Actors

Citizens

13.1.3 Pre-Conditions

Citizen has a registered account OR Citizen has a linked account with no case OR Citizen has a linked account and a single active case with user role Case Member.

Citizen has not already started and saved an application or submitted an application that is in progress (not in Completed status).

13.1.4 Post-Conditions

The user has submitted an application.

13.1.5 Main Scenario

1. User opens the Citizen Portal home page
2. User clicks 'Login' in the home page header to display the 'Login' page
3. User completes required fields, including username and password
4. User clicks 'Login' button
5. The Dashboard for a logged-in user is displayed
6. User clicks on Apply for benefits link
7. Apply for benefits page is displayed
8. User clicks next
9. Include benefits page is displayed
10. User can select to apply for retroactive coverage and clicks next
11. Application overview page is displayed

12. User reviews the information on the page and clicks 'Start application' to begin an application
13. The 'Information about you' page is displayed
14. User proceeds to complete the application pages
15. Once the application is signed and submitted the 'Application Submitted' page is displayed
16. End Use Case

13.1.6 Extensions

No extension identified.

13.1.7 Frequency

Multiple times.

13.1.8 Special Requirements

13.1.8.1   Performance

No special performance requirements.

13.1.8.2   Security

No special security requirements.

13.1.8.3   Usability / Accessibility

No special usability requirements.

13.1.8.4   Other

No other requirements.

13.2 Use Case 2: Complete a prepopulated online application

13.2.1 Description

Citizen wants to submit an application.

13.2.2 Actors

Citizens

13.2.3 Pre-Conditions

Citizen has a linked account with a single case where their user role is Primary Member.

Citizen has not already started and saved an application or submitted an application that is in progress (not in Completed status).

13.2.4 Post-Conditions

The user has submitted an application.

13.2.5 Main Scenario

1. User opens the Citizen Portal home page

2. User clicks 'Login' in the home page header to display the 'Login' page

3. User completes required fields, including username and password

4. User clicks 'Login' button

5. The Dashboard for a logged-in user is displayed

6. User clicks on Apply for benefits link

7. Apply for benefits page is displayed

8. User clicks next

9. Application overview page is displayed

10. User reviews the information on the page and clicks 'Start application' to begin an application

11. User is prompted to review current address and make changes as needed

12. Next, user is prompted to review household members and remove members as needed.

13. Next, user is prompted to review their personal information summary page and make changes as needed

14. Next, user is prompted to review the home member information summary page and make changes as needed

15. Next, user is prompted to review the general information summary page and make changes as needed

16. Next, user is prompted to review the summary of your income page and make changes as needed

17. Next, user is prompted to review the summary of your expenses page and make changes as needed

18. Next, user is prompted to review the summary of your resources page and make changes as needed

19. Next, user is prompted to review the health insurance summary page and make changes as needed

20. Finally, user is prompted to review the disclosure and agrees to the terms and conditions on the Electronic Signature page

21. User submits the application and the confirmation page is displayed

22. End Use Case

13.2.6 Extensions

No extension identified.

13.2.7 Frequency

Annual or less often.

13.2.8 Special Requirements

13.2.8.1   Performance

No special performance requirements.

13.2.8.2   Security

User must had completed ID Proofing.

13.2.8.3   Usability / Accessibility

No special usability requirements.

13.2.8.4   Other

No other requirements.

13.3 Use Case 3: Submit a Renewal Form

13.3.1 Description

Citizen wants to submit a renewal form.

13.3.2 Actors

Citizens

13.3.3 Pre-Conditions

Citizen has a linked account.

Citizen is a primary client on an active case.

A household member is in their recert period.

A renewal form is not saved, or already submitted and in progress.

13.3.4 Post-Conditions

The user has submitted a renewal form.

13.3.5 Main Scenario

1. User opens the Citizen Portal home page
2. User clicks 'Login' in the home page header to display the 'Login' page
3. User completes required fields, including username and password
4. User clicks 'Login' button
5. The Dashboard for a logged-in user is displayed

6. User clicks on Your benefits

7. User clicks Start button within the Online Renew card

8. Renewal Overview page is displayed

9. User reviews the information on the page and clicks 'Next' to begin a renewal

10. User completes steps 11 – 20 of Use Case 2: Complete a prepopulated online application

11. Once the renewal is signed and submitted the 'Renewal Submitted' page is displayed

12. End Use Case

13.3.6 Extensions

No extension identified.

13.3.7 Frequency

Annually for each certification period in a household.

13.3.8 Special Requirements

13.3.8.1   Performance

No special performance requirements.

13.3.8.2   Security

User must had completed ID Proof

13.3.8.3   Usability / Accessibility

No special usability requirements.

13.3.8.4   Other

No other requirements.

13.4 Use Case 4: Submit a Change on the Citizen Portal

13.4.1 Description

Citizen wants to submit a change of circumstances on the Citizen Portal.

13.4.2 Actors

Citizens

13.4.3 Pre-Conditions

Citizen has a linked account.

13.4.4 Post-Conditions

The user has an email confirming the change was reported.

13.4.5 Main Scenario

1. User opens the Citizen Portal home page

2. User clicks 'Login' in the home page header to display the 'Login' page

3. User completes required fields, including username and password

4. User clicks the 'Login' button

5. The Dashboard for a logged-in user is displayed

6. User clicks 'Profile' tab

7. Your Profile screen is displayed

8. User clicks on Change of Circumstance card

9. User reviews the Change of Circumstance overview page and clicks on next

10. User select the type of changes to report against

11. The summary page for the first change type is displayed. User can make the necessary updates then proceed to the next summary page until all the summary pages for each of the selected change types have been displayed and reviewed.

12. The user reads the disclosure and agrees to the terms and conditions on the Electronic Signature page

13. The user clicks on next and the Confirmation page is displayed

14. End use case

13.4.6 Extensions

13.4.6.1   Extension 1 (After Main Scenario, Step 10)

This extension happens when the user does not select any change types.

15. The Citizen Portal displays the message ''<Please select at least one type of information to change.>"

16. User selects at least one change type

17. Return to step 11 in Main Scenario

13.4.6.2   Extension 2 (After Main Scenario, Step 7)

This extension happens when the user clicks on Change Address card.

18. User clicks on Change Address card

19. Address overview page is displayed

20. User navigates through the address change pages and reports address(es) change

21. Address Change summary page is displayed

22. Return to step 12 in Main Scenario

13.4.6.3   Extension 3 (After Main Scenario, Step 7)

This extension happens when the user clicks on Add/Remove Household Member card.

23. User clicks on Add/Remove Household Member

24. Add and Remove household member overview page is displayed

25. User removes a household member by entering all relevant details

26. User answers Yes to add another household member and clicks on next

27. User reviews the Removed Household Member Summary page and clicks on next

28. User is navigated to the online application to enter information pertaining to the new member from the Home Member Page to Health Insurance Summary page.

29. Return to step 12 in Main Scenario

13.4.6.4   Extension 4 (After Main Scenario, Step 7)

This extension happens when the user clicks on Change Income card.

30. User clicks on Change Income card

31. Summary of your income is displayed

32. User enters the income changes

33. Return to step 12 in Main Scenario

13.4.7 Frequency

Multiple times.

13.4.8 Special Requirements

13.4.8.1   Performance

No special performance requirements.

13.4.8.2   Security

User must had completed ID Proofing.

13.4.8.3   Usability / Accessibility

No special usability requirements.

13.4.8.4   Other

If user is primary client on the case, then user can view and report changes for the entire household. If user is a non-primary member on the case, the user can only view their information and make changes to their information.

13.5 Scenarios

13.5.1 Citizen Portal Homepage Scenarios

Table 12: Citizen Portal – Homepage

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
ONLCOC-HP-001	To validate that changes have been made, per the design document, on the Sign Up Page.	Access the Sign Up page from the Citizen Portal Home Page and validate the changes to screen.	All changes have been made.
ONLCOC-HP-002	To successfully Log In to Citizen Portal with the username and temporary password provided by caseworker. Promoted to set password on the 'Set your password' page, per the design document.	Access the Log In page from the Citizen Portal and sign into user account. Set Password page appears. Enter a new password, press Submit. Login again with the new password.	Successfully sign into user account and 'Log Out' displays.
ONLCOC-HP-003	To validate that changes have been made, per the design document, to the Citizen Portal Footer.	Access Citizen Portal via the SIT URL and validate the changes.	All changes have been made.

13.5.2 Citizen Portal Your Account Scenarios

Table 13: Citizen Portal – Your Account

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
ONLCOC-YA-001	To validate that changes have been made, per the design document, to the Citizen Portal Dashboard for a Registered account.	Access the Log In page from the Citizen Portal and sign into user account for a registered user.	All changes have been made.

ONLCOC-YA-002	To validate that changes have been made, per the design document, to the Citizen Portal Dashboard for a Linked account.	Access the Log In page from the Citizen Portal and sign into user account for a user with a linked account.	All changes have been made.
ONLCOC-YA-003	To validate the 'Link my account' page of the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into user account for a registered user. From the Dashboard select 'Link my account'. Complete the page and press Submit.	The page appears and functions as described in the design document. A task is created for the caseworker to perform the link.
ONLCOC-YA-004	To validate that changes have been made, per the design document, to the Citizen Portal Your benefits page for a Linked account.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your benefits'.	All changes have been made.
ONLCOC-YA-005	To validate the 'Profile' page of the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your profile'.	The page appears and functions as described in the design document.

ONLCOC-YA-006	To validate the 'Your settings' page of the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'Update your settings'.	The page appears and functions as described in the design document.

13.5.3 Citizen Portal Application Scenarios

Table 14: Citizen Portal – Application

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
ONLCOC-APP-001	To validate prepopulated fields in the online application is based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your benefits', then press 'Apply for benefits'.	Verify that the application appears with prepopulated information and that all changes have been made.
ONLCOC-APP-002	To validate an application with retroactive coverage in the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your benefits', then press 'Apply for benefits'. On the 'Include benefits' page, select 'Retroactive Government Health Plan / Medicaid Program'.	All changes have been made.

13.5.4 Citizen Portal COC Scenarios

Table 15: Citizen Portal – Change of Circumstance

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
ONLCOC-COC-001	To validate the 'Change of Address' pages of the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your profile', then 'Change Address'.	The pages appear and function as described in the design document.
ONLCOC-COC-002	To validate the 'Add and Remove Household Member' pages of the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your profile', then 'Add/Remove a Household member'.	The pages appear and function as described in the design document.
ONLCOC-COC-003	To validate the 'Change of Income' pages of the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your profile', then 'Change Income'.	The pages appear and function as described in the design document.
ONLCOC-COC-004	To validate the 'Change of Circumstance' pages of the Citizen Portal based on the design document.	Access the Log In page from the Citizen Portal and sign into the account for a user with a linked account. From the Dashboard select 'View your profile', then 'Change of Circumstances'.	The pages appear and function as described in the design document.

13.5.5 Citizen Portal Renewal Scenarios

Table 16: Citizen Portal – Renewal

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
ONLCOC-REN-001	To validate prepopulated fields on the online renewal form in the Citizen Portal is based on the design document.	Access the Log In page from the <Citizen Portal> and sign into the account for a user with a linked account, within their renewal period. From the Dashboard select 'View your benefits', then press 'Renew'.	Verify that the renewal form appears with prepopulated information and that the pages appear and function as described in the design document.

13.5.6 Caseworker Portal Scenarios

Table 17: Caseworker Portal

Scenario number	Scenario Explanation	Scenario Description	Expected Outcome
ONLCOC-CWP-001	To validate that changes have been made, per the design document, on the Caseworker Portal Person menu and the New Account page.	Access the main menu for a Person in the Caseworker Portal, for a person without a Citizen Portal account. Select "New PSPMPR Account".	All changes have been made.
ONLCOC-CWP-002	To validate that changes have been made, per the design document, on the Caseworker Portal Person menu and the Disable Account page.	Access the main menu for a Person in the Caseworker Portal, for a person with an enabled Citizen Portal account. Select "Disable PSPMPR Account".	All changes have been made.

ONLCOC-CWP-003	To validate that changes have been made, per the design document, on the Caseworker Portal Person menu and the Enable Account page.	Access the main menu for a Person in the Caseworker Portal, for a person with a disabled Citizen Portal account. Select "Enable PSPMPR Account".	All changes have been made.
ONLCOC-CWP-004	To validate that changes have been made, per the design document, on the Caseworker Portal External User page.	Open an External User in Caseworker Portal. Select the "Attachments" tab.	All changes have been made.

14 Related Documents

All the documents listed in the table below is part of the Citizen Portal FDD deliverable.

Table 18: Related Documents

Document Name
Notice Layout for Citizen Portal Announcement Notice.docx
Notice Layout for Notice of Paperless Enrollment.docx
Notice Layout for Undelivered e-Notification Notice.docx
Notice Layout for Welcome to PSPMPR Notice.docx
<CR189> ~~Online COC - AddRemoveHHM.xlsx~~
Online COC - App COC & Renewal.xlsx
<CR189> ~~Online COC - Change of Address.xlsx~~
Online COC - General.xlsx
Online COC - Worker Portal.xlsx
SNIPPETS - Online COC.xlsx

15 Requirements Matrix

This section contains a Requirements Matrix that states the Requirement Description, if there is a Fit or Gap, and any Implementation Details. The Requirements Matrix only contains requirements pertaining to the implementation of the Citizen Portal functionality within PREE. All requirements for the PREE project are maintained in JIRA. Below is an extract from JIRA of the requirements related to Citizen Portal FDD. The requirements and the implementations details listed below will also be included within the PREE Project Requirement Traceability Matrix. The 'Requirement Met OOTB Status' column represents PRMP's approval for the requirements SI has demonstrated have been met OOTB without modifications. If 'N/A' is displayed within this column then modifications had to be made to satisfy the applicable requirement.

For requirement traceability purposes, the following requirements are met and mapped to this design document.

Table 19: Requirement Matrix

Requirement Number	Requirement Description	Fit-Gap	Implementation Details	Requirement Met OOTB Approval Status
FR-AL-001	The Solution shall have the ability to distribute notice-related alerts via email to the Applicant.	Fit	Citizen Portal will collect user's email address and send email upon notice generation.	N/A
FR-ED-026	The Solution shall allow Applicants/members, as defined by Puerto Rico, to submit verification materials electronically, by using a mobile device to send a photograph of the document using MMS (Multi Media Message) or email.	Fit	When the user clicks on browser, it allows user to select a photograph from their mobile device to be sent.	N/A
FR-ED-072	The Solution shall have the ability to identify when an email delivery error occurs.	Fit	When an error occurs, a notice will be sent by postal mail to inform the user that PRMP tried to send them a notification via email or SMS text message, but it was unsuccessful. Instructions on how to correct their communication method and the message which could not be sent are included.	N/A
FR-INT-019	The Solution shall allow Applicant/member to view application & renewal status, coverage, and notices through an online channel.	Fit	The Citizen Portal will display application and renewal status, and notices.	N/A

FR-INT-020	The Solution shall allow Applicant/member ability to submit/update application or report changes through an online channel.	Fit	The Citizen Portal will allow submission of applications, renewals, and reports of change of circumstances.	N/A
FR-INT-022	The Solution shall have the ability to display privacy notifications, including Section 508 compliance notifications, as defined by Puerto Rico.	Fit	The Citizen Portal OOTB provides a footer with links to PRMP Disclaimers, Privacy, and Accessibility message.	N/A
FR-INT-027	The Solution shall allow an Applicant to specify or update their preferences. Preferences may include, but are not limited to: i. Preferred method of communication (i.e., email, SMS/text, phone, etc.) ii. Subscription to alerts and notifications (e.g., changes to client record, new messages, referral changes, etc.) iii. Notification types desirediv. Language preference including notification (Spanish/English)	Fit	The Citizen Portal will allow the user to modify email address, cell phone, language, and paperless preference for online notices.	N/A
FR-INT-028	The Solution shall generate a notification to the user that the personal preferences have been updated.	Fit	The Citizen Portal will send a notification to the user when communication settings (email, phone) are changed or paperless notices are selected.	N/A

FR-INT-029	The Solution shall have the ability to activate user account, provide account confirmation and send notification to the user based on user preferences.	Fit	Sign up page will allow the user to activate an account in the Citizen Portal. Once an account is created, a confirmation message is displayed, and a notification is sent.	N/A
FR-INT-039	The Solution shall allow member/Applicants to attach documents (including but not limited to verification proof documents) to a case/individual.	Fit	The Citizen Portal OOTB includes a 'Your Documents' tab where users can attach documents for application, renewal and COC verifications.	OOTB - Pending Approval
FR-INT-041	The Solution shall allow members/Applicants to delete documents from an individual/case file based on user role.	Fit	User can delete upload files to their case, as needed, prior to submission. Once submitted, user can contact PRMP to request the removal of a submitted document.	N/A
FR-INT-046	The Solution shall provide the capability for online Applicants/member to enter or report changes of circumstances through the online portal.	Fit	The Citizen Portal will allow reporting of changes to address, household member, income, and general information.	N/A
FR-INT-058	The Solution shall provide the capability to allow Applicants to apply for multiple public assistance programs online.	Fit	The Citizen Portal will allow users to apply for Medical Assistance (this application supports systematic evaluation for MAGI and Non-MAGI and manual evaluation for Spenddown) and Retroactive Medical Assistance.	OOTB - Pending Approval

FR-INT-060	The Solution shall provide the capability for members to renew Medicaid eligibility through all modes (online, phone, fax, mail, in person.	Fit	The Citizen Portal will provide for online renewals; other modes are supported by the caseworker portal and discussed in the Renewal FDD.	N/A
FR-INT-066	The Solution shall have the ability to alert Applicants/members prior to their un-submitted application being deleted at the end of a configurable Puerto Rico's defined time period.	Fit	When an application or renewal form reaches an age of 15 and 28 days, a reminder notification is sent to the user. On day 30, the form will be deleted.	N/A
FR-INT-113	The Solution shall be able to receive and process applications, without human intervention.	Fit	The system will process applications submitted online. When PREE cannot complete the entire application processing, a task will be generated to notify a caseworker.	N/A
FR-NT-005	The Solution shall give Applicant/member a choice in viewing application status, coverage, and notices through an online channel.	Fit	Users will be able to view application status, view their coverage, and view/print their notices.	N/A
FR-NT-006	The Solution shall generate and send a notice by regular mail notice to confirm and document an individual's decision to receive notices electronically.	Fit	A notice will be sent by postal mail to inform the user that they will not be receiving Notices by mail in the future. Notices can be viewed and printed from the Citizen Portal.	N/A

FR-NT-007	The Solution shall generate and send a notice by regular mail notifying individuals of their right to change their election to receive notices electronically.	Fit	The notice which informs the user that they will not be receiving Notices by mail in the future includes a description of where to change this election.	N/A
FR-NT-008	The Solution shall post electronic notices within 1 business day of notice generation and send an electronic communication alerting the individual that a notice was posted.	Fit	Notices are generated and made available on the Citizen Portal immediately, and a notification is sent to alert the user.	N/A
FR-NT-009	The Solution shall generate a notice of a failed electronic communication and send by mail within 3 business days from when the electronic communication is undelivered.	Fit	A notice will be sent by postal mail to inform the user that PRMP tried to send them a notification message, but it was unsuccessful. Instructions on how to correct their communication method and the message which could not be sent are included. The notice will be available for printing and mailing within 3 business days. The Central Printing process is responsible for the actual printing and mailing of the notice.	N/A
FR-NT-010	The Solution shall generate and send a paper version of an electronic notice by mail upon Applicant/member request.	Fit	The Citizen Portal allows a user to request that a notice in the Citizen Portal be mailed to them.	OOTB - Pending Approval

FR-WM-033	The Solution shall allow external users (Applicant/member) to have tasks assigned to them for completion of applications and redeterminations / recertifications.	Fit	The Citizen Portal will alert users of incomplete applications and pending renewals upon sign-in, through notifications, and notices which are visible on the citizen portal.	N/A
T3.2.20	The Workflow/BPM component shall support multiple forms of electronics notification channels and protocols for external users (e.g. text, page, SMTP, SNMP, SMS, etc.).	Gap	The Citizen Portal will notify users within the portal and by email or SMS text message <Pending Decision EE-DL00271>.	N/A

16 Issue Register

Issue #	Issue	Resolution	Resolution Date
EE-DL00271	PRMP to decide if PSPMPR accountholder will have the option to receive notification by text message.		

17 Deliverable Schedule

FDD Submission Schedule	
FDD Submission Date:	
PRMP Draft Review and Comment Period:	5 Business Days after receipt of draft FDD submission
Final Submission Due:	3 Business Days after receipt of draft comments
PRMP Final Approval Period:	2 Business days after receipt of updated deliverable version