



## Ohio SACWIS Project

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### Meeting Minutes

**Meeting Name:** RRD Session on Alerts, Ticklers, and Notifications

**Place:** 255 East Main Street, 3<sup>rd</sup> Floor, and Columbus, Ohio 43215

**Date:** July 19, 2004

**Time:** 8:30am – 4:30pm

#### Participants:

Althea Walker	Barbara Pearson-Jones (Scribe)
Barbara Wright	Cathy Appel
Christopher Cabot	Jack South
Jaida Patterson	Krista Voltolini
Linda Ferguson	MaryJane Johnson
Ravi Nalanagula	Reva Weekley
Senorath Abeyrathe	Sherry Edwards
Veronica Halloway	

#### Observers:

Greg Hollifield	Daryl Dunlap
Karen Pluta	

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### Summary of Meeting Points

#### Review Action Items from Previous Meetings

1. Requirement RFP 681.3 – Alerting caseworker to update a profile(s). Clarification was requested. A Profile(s) includes the following: Case, Person or Family records. Profiles are updated on yearly basis.

#### Use Case UC255 – Process Automated Ticklers

The Team agreed that a single Scenario was too broad. The Scenario was broken down to a total of 4 scenarios covering the Generation, Display, Escalation and Deletion of ticklers. The Team agreed that, as a best practice, before transferring a case to another county, all ticklers pertaining to the case should be resolved if possible.



## Ohio SACWIS Project

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### **Use Case UC134 – Maintain Ticklers**

The Team agreed to the definition of Tickler Type to be “business category” for instance Investigation, Certification, etc.

The Team agreed to add separate Scenarios for the Adding, Modifying and Deleting (Deactivating) ticklers in order to maintain consistency within the Use Cases in which modification is covered.

### **Use Case UC235 – Process Automated Notifications**

Requirements 293.2 and 293.3 dealing with Nationwide Protective Service Alert were originally listed on this Use Case. However, they were assigned to Team 2.

Use Case 235 now address Requirements #681.1, 681.2, 681.3, and 707 through 711. The group consensus is that for Requirement #709, the alert should be in the form of a tickler for the supervisor.

The group discussed the “notifying/alerting a supervisor that a case needs assigned.” The group agreed that this could be a “tickler.” However, there was no consensus on establishing a time-frame for this task. (RFP 681.1)

The group agreed that an error message is needed if a notification is un-deliverable. The manner in which this notification would be handled would be addressed during the design phase of this project.

### **Use Case UC331 – Maintain Notifications**

Ravi Nalanagula brought up the subject that a use case was not created for the process of maintaining notifications. This was discussed by the team and the group agreed a use case was needed.

The team discussed and agreed the definition of priority for “Notifications” in this use case would be High, Medium and Low.

A question was raised as to why the “recipient type” is needed. The response was given that Recipient Type would define whether the recipient is an internal or external recipient.



## Ohio SACWIS Project

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### Action Items

1. RFP# 681.1 and 709 – COA Regulations. Are there any COA regulations on how many days does a Supervisor have to assign a case. Information is needed to verify whether the assignment notification to worker should be a tickler/notification.
2. Definition of Profile – Check with Case Management: Team 2 regarding this group's definition on emotional, physical characteristics.

### Parking Lot

There were no items recorded.

### Issues

1. Req. 34 on “ad-hoc Alerts/Ticklers” was interpreted by the State and County participants to mean “county-specific” alerts/ticklers. This requirement has been sent to the Change Review Board (CRB) for further clarification and a decision.
2. A need for Tickler deletion functionality was expressed by the County participants. For instance, when ticklers for items that cannot be “corrected” (i.e.: missed home visits). The question was raised as to how these types of ticklers would be cleared if the item could not be corrected.