DMAS – OCLA DIVISION

OCLA Database

User Guide

8/1/2013

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Gaining Access to the OCLA Database

ALL users should read this section. Its subsections explain how to become a designated user, how to get the URL for the database, how to find your COV UID, and how to log in.

Becoming a Recognized User

You must be designated as an OCLA user *before* you attempt to log in. Your manager should add you by following the instructions in the "Adding an OCLA User" subsection of this guide.

Getting the URL

The OCLA Database is a Web-enabled application, so it has a URL that directs you to its main page.

Ask your manager or a co-worker to send you the production URL. Then, click on it and make it a "Favorite" in Internet Explorer, where you will go to access it each time you log in.

Finding Your COV UID

When you have been added as a user (above) and saved the production URL, you will use your 8-digit COV User ID (UID) to log in. *Your password is the same password you use every morning to log into your computer.*

If you do not know your 8-digit COV UID, do the following to get it:

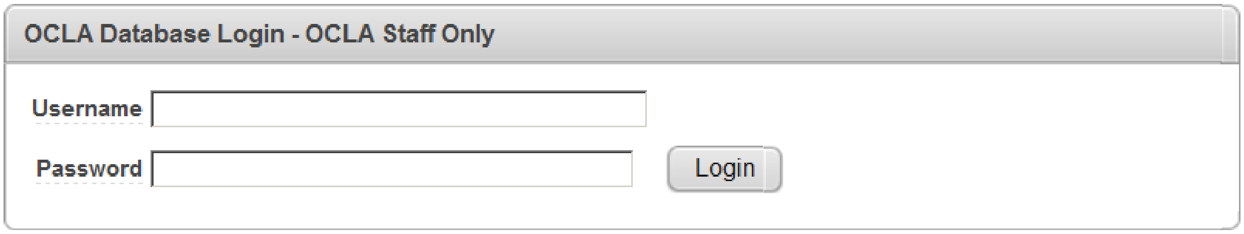
- Go to the DMAS Web page at http://dmashome/
- Click the "DMAS ORACLE APEX APPLICATION LINKS" link (right-hand side, bottom)
- Click the dropdown list button shown below

- Find your name and make note of the 8-character ID next to it. That is the ID you will use to log in.

Logging in with Your COV UID

After you have been created as a user (by your manager), received the production URL from your manager or a co-worker, and found your COV UID, you can log into the OCLA database as follows:

- Go into Internet Explorer, and select the production URL for the OCLA database that you saved per the instructions above (second paragraph in "Gaining Access to the OCLA Database" above).
- Type your COV UID in the "Username" field shown below
- Type your LAN password in the "Password" field below



- Click “Login” to log in. Doing this will place you on the database’s main screen.

Important Concepts: Understanding the User Interface

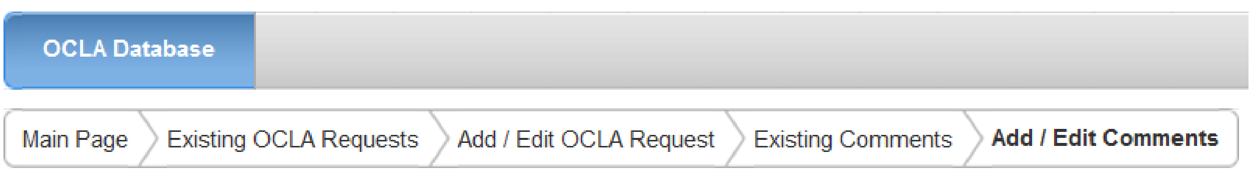
The OCLA database is a Web application, so it offers some conventions that are not present in the older client-server way of doing things. Understanding these things will help you use the system.

“Bread Crumbs” (a navigation concept)

When you are dealing with different Web pages as part of a database application, it is good to be able to retrace your steps so that you can return to a previous page, or even a page before that, as you do your work. In short, “bread crumbs” are a navigation concept that allows you to do this.

To accommodate this, Oracle has created something they refer to as “bread crumbs”. These appear in a horizontal list at the top of your screen (as shown in the screen shot below), and they indicate the page progression associated with your “steps.” In the example below, the first page the user went to from the Main Page was the “Existing OCLA Requests” page. Then, the user chose a Request and arrived on the “Add / Edit OCLA Request.” From there, the user clicked the “Comments” Button to arrive on the “Existing Comments” page, and from there the user clicked “Create” to land on “Add / Edit Comments.”

All of these items are considered “bread crumbs.” You can click on them to retrace your steps, and you do NOT have to click on them in order. For example, in the example below you could click “Main Page” while still on “Add / Edit Comments.” Doing this would return you to the Main Page.



Note that the “Main Page” is the bread crumb for the screen that you see when you log in. That bread crumb receives a lot of mention in the following pages.

“Reports on top of Forms”

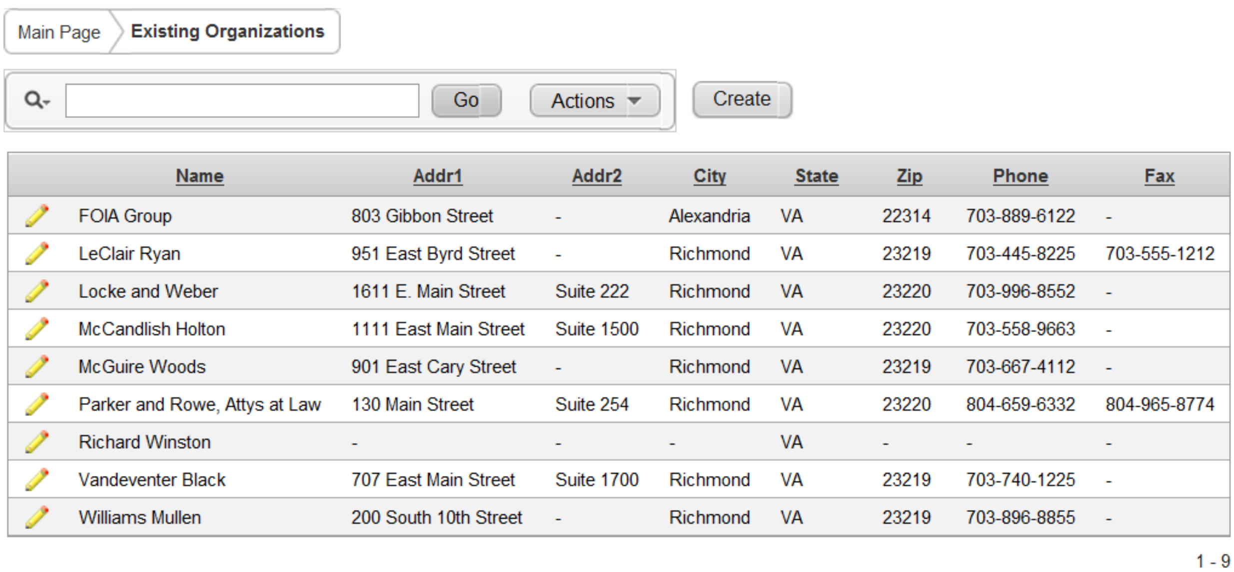
The Oracle tool that was used to create the OCLA database gives you a list of all of the records that you have saved in a given area of the database (such as Requests, Individuals, Organizations, etc.) and then lets you do one of two main things from there: Create a new one by clicking a “Create” button, or search for a particular existing one by using a built-in search feature. This is called “report on top of form,” since the first thing you see is a report, and from there you access the user interface screen, or “form,” that allows you to add another record. You will become familiar with this concept after using the dataset for only a short while. The following is an example of this "report on top of form" concept, and it involves the Organization screen.

Understanding the Report and the Form

The following subsections explain the report and the form.

Seeing Existing Records: The Report

When you click the "Add / View / Edit Organizations" button on the Main Page, you arrive on the report page shown in Figure A below. It is a report of ALL of the organizations that have already been saved to the database. If it were a very long list and you wanted to search to find one that was not readily visible in the list, you would do a search using the hour-glass icon shown below (top, left side). To learn how to search, see the section called "Searching" later in this guide. To view the record for anything shown in the list, you click the pencil icon on the left side. That takes you to the actual record, where you can either view it in more detail or perform edits.



	Name	Addr1	Addr2	City	State	Zip	Phone	Fax
	FOIA Group	803 Gibbon Street	-	Alexandria	VA	22314	703-889-6122	-
	LeClair Ryan	951 East Byrd Street	-	Richmond	VA	23219	703-445-8225	703-555-1212
	Locke and Weber	1611 E. Main Street	Suite 222	Richmond	VA	23220	703-996-8552	-
	McCandlish Holton	1111 East Main Street	Suite 1500	Richmond	VA	23220	703-558-9663	-
	McGuire Woods	901 East Cary Street	-	Richmond	VA	23219	703-667-4112	-
	Parker and Rowe, Attys at Law	130 Main Street	Suite 254	Richmond	VA	23220	804-659-6332	804-965-8774
	Richard Winston	-	-	-	VA	-	-	-
	Vandeventer Black	707 East Main Street	Suite 1700	Richmond	VA	23219	703-740-1225	-
	Williams Mullen	200 South 10th Street	-	Richmond	VA	23219	703-896-8855	-

Figure A. Example of a Report that Sits on Top of a Data Entry Form.

Adding a New Record: The Form

If you want to create a new Organization (rather than look at an existing one as described above), you click the "Create" button shown in Figure A above. Doing this will take you to the data entry screen for adding a new Organization, as shown in Figure B on the next page.

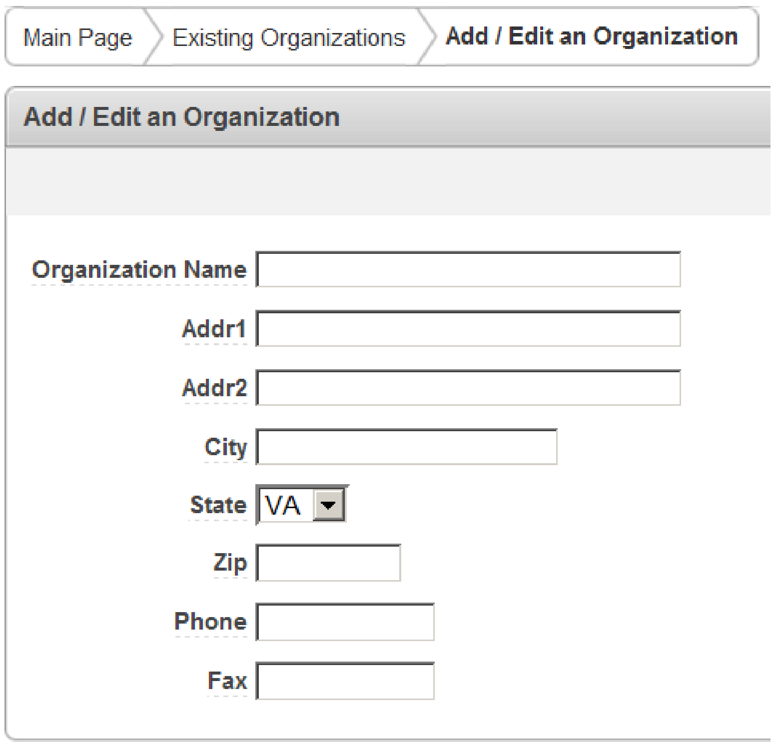


Figure B. Example of a Data Entry Form.

When you have filled in the information you have for the Organization and clicked the “Create” button on it (not shown in Figure B above), the database will return you to the report screen shown in Figure A above, and your entry will be in the list.

Summarizing the “Report on Top of Form” Concept

In a nutshell, the automated report that lies on top of the data entry form allows you to see and/or find data you have already entered. That report “sits” on top of the data entry page, or “form,” where you add new records or edit existing ones.

All of the data entry screens in the OCLA Database are built around this concept, so when you click buttons to add new things (e.g., Requests, Individuals, Organizations, Comments, etc.), you will first arrive on the report that shows existing items, and from there you will click a “Create” button to advance on to the data entry page.

Required Fields

Where applicable, data entry instructions in this guide indicate required fields (below the title of the section). Additionally, the database has sets of checks and balances that interrupt your attempt to save data if you have left out a required field, and it tells you which field(s) is missing.

Creating a Request

The main part of the "Request" screen is shown below (with a made-up person's name).

Note that staff hours, copy costs, and extra costs have a place at the bottom of the Request screen but are not shown below. For information on adding those items, see the "Adding Staff Hours, Copy Costs, and Extra Costs" subsection of this guide.

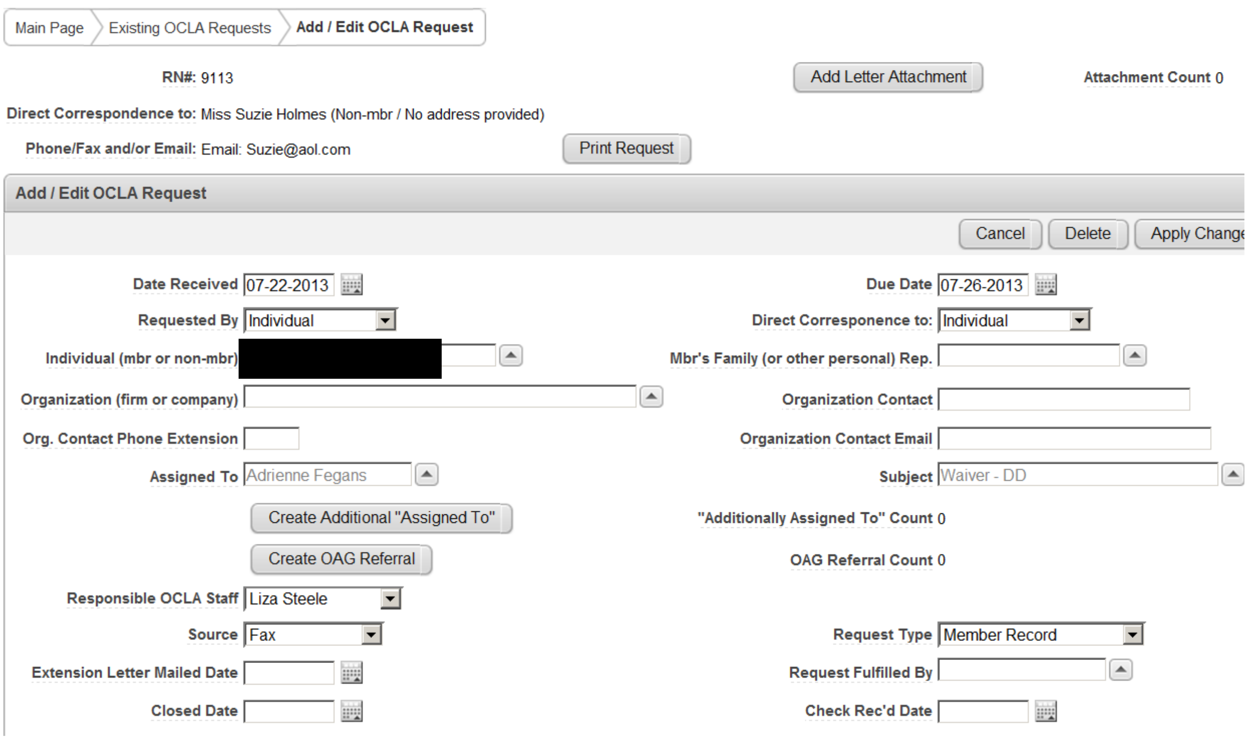


Figure 1. Request Screen. (NOTE: The data above is 100% artificial and represents no PHI.)

Entering Preliminary Data before Creating the Request

Individuals, Family members, Organizations, OAG Referral people, and OCLA Users *have to be entered in a separate area of the database in order to become available in the dropdown lists for those items shown in Figure 1 above*.

The table on the next page provides information on how to enter these items in other areas of the database so that they will appear in the corresponding dropdown list fields on the Request screen.

Field	What it is	How to add an item to its list
"Individual (mbr or non-mbr)"	This is the name of the person about whom information is being requested	See the subsection, "Adding an Individual" below. Subsections of this subsection include information on adding *Members* and *Non-members*.
"Mbr's Family (or other personal) Rep	This is the relative or other intimate (NOT a firm or firm contact!) who is requesting information about the member	See the subsection, "Adding a Family Member," in the "Add a Member" portion of the "Adding an Individual" subsection below.
"Organization (firm or company)"	This is the firm, company, or other business entity that is making a request, either for itself or for a member or non-member	See the subsection, "Adding an Organization" below.
"OAG Referral" (accessible by way of the "Create OAG Referral" button on the Request)	This is the name of the OAG person that you are referring the Request to.	See the subsection, "Adding an OAG Person" below.
"Assigned To"	This is the OCLA staff person to whom the Request is assigned.	See the subsection, "Adding an OCLA User" below.
"Subject"	This is the main subject of the Request.	See the subsection, "Adding a Subject" below.

Figure 2. Request Fields that Require Data Entry Elsewhere.

Adding an Individual

Required Fields: for a Member: Medicaid ID only; for a Non-member: First Name, Last Name

Do the following to add an Individual so that he or she will appear in the "Individual (mbr or non-mbr)" list on the Request screen shown in Figure 1 above:

- On the Main Page of the OCLA database, click the button shown below:
  Add / View / Edit Individuals (Mbrs and Non-mbrs)
- On the page it leads you to, click the "Create" button (middle of screen, towards top)
- On the screen it takes you to (next page) add a Member or Non-member as described, also on the next page:

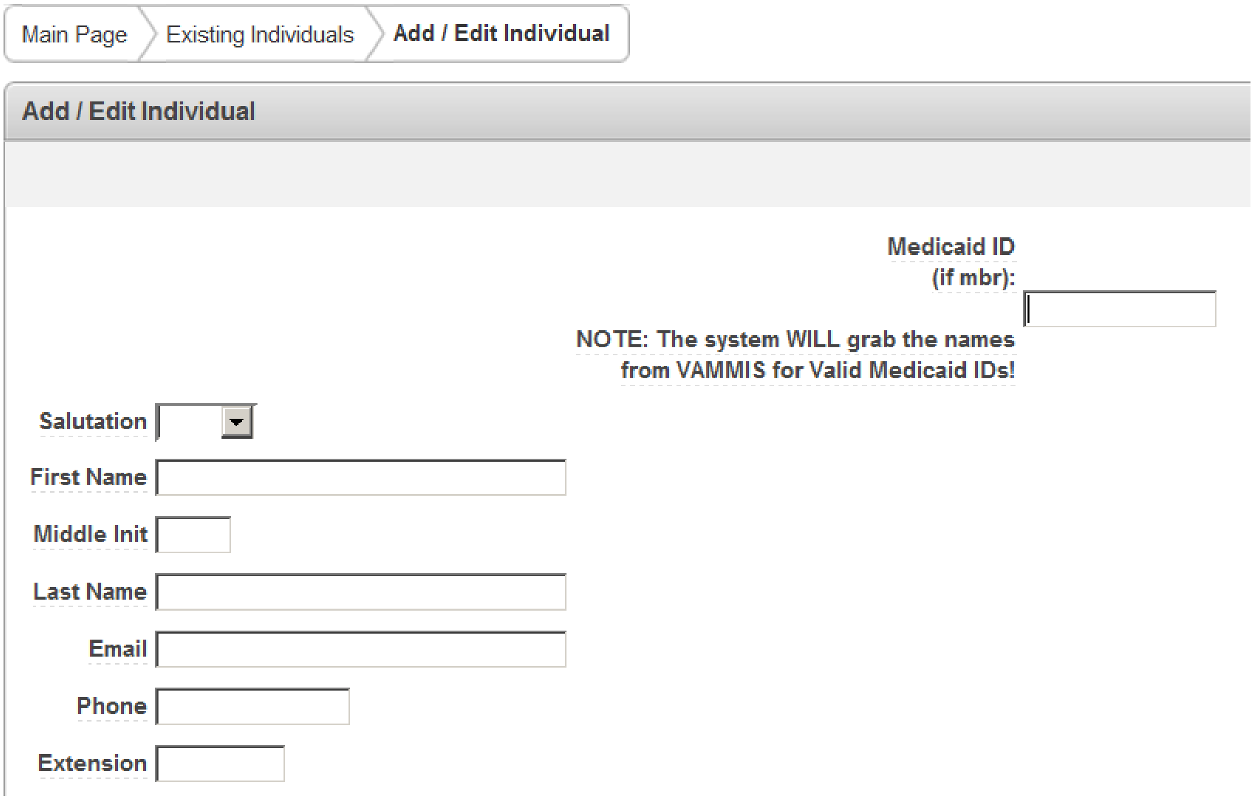


Figure 3. Add/Edit Individual Screen.

Add a Member

- *Required Fields: Medicaid ID*

Definition of Member: A "Member" is someone who has a Medicaid ID associated with him or her. The "Medicaid ID" field is required, but only for Members who have them. Non-members can be added on the same screen (see the subsection below), and Medicaid IDs are not required for those persons.

Follow the bullet points below to add a Member on the "Add/Edit Individual" screen. But first, note that any given member should only be added ONE time and that the system will disallow any attempts to add the same Medicaid ID a second time. See the "Interpreting Error Messages" section of this guide for more information.

- Type the Medicaid ID in the "Medicaid ID" field
- Skip the "First Name," "Middle Initial," and "Last Name" fields, because the system will find those for any valid Medicaid ID.
- Type any of the following items if you know them—
  - Email
  - Phone
  - Extension
- Click the "Create" button in the upper-right area of the screen (NOT shown above)

- Doing this will return you to the “Existing Individuals” screen, where you will see at the top the person you just added
- If you need to add a <u>Family member</u> who is representing the Member, follow those instructions in the next subsection; otherwise do the next bullet point here:
- Click the “Main Page” bread crumb at the top of the screen to return to the main page

  NOTE: The action you just took will cause the new Member name to show at the TOP of the list of names generated by the “Individual (mbr or non-mbr)” dropdown list shown in Figure 1 above. You will now be able to choose that person from the list when you create your Request.

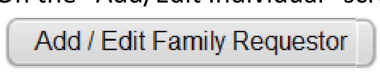
<u>MEMBER ADDRESS NOTE</u>: You do NOT need to supply an address for a Member. Address information will be pulled *to the top of the Request*, from VaMMIS, when you have created the Request and selected the Member person from the “Individual (mbr or non-mbr)” field.

Adding a Family Member

Follow the bullet points below to add a Family member as a Member’s authorized representative. But first, do a reality-check:

REALITY CHECK: Make sure you are not about to add a *representative of an Organization* (such as a law firm, company, political entity, etc.) here. Those people’s names go ON the Request itself, in the “Organization Contact” field, and their organizations go on the Organization screen.

Otherwise, do the following to add a Family member for an Individual <u>*who is a Member*</u>:

- On the “Existing Individuals” screen, click the pencil icon (on the far left) *for the Member you just added.* That person will be at the top of the “Existing Individuals” list immediately after being added.
- On the “Add/Edit Individual” screen, click the button shown below:
  

- On the screen that takes you to, click the “Create” button (center, near the top)
- On the “Add/Edit Family Requestor” screen, fill in all of the information that you know and click “Create.” Doing this will return you to the “Add/Edit Individual” screen, where the Family member’s name will appear at the bottom.
- Click the “Main Page” bread crumb at the top of the screen to return to the main page

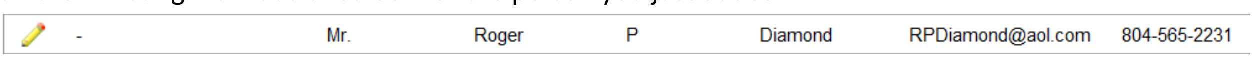
  NOTE: The action you just took will cause the new Family member name to show at the TOP of the list of names generated by the “Mbr’s Family (or other personal) Rep.” dropdown list shown in Figure 1 above. You will now be able to choose that Family member when you create your Request.

Add a Non-member

- *Required Fields: First Name, Last Name*

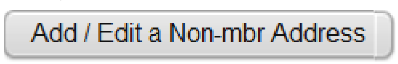
Definition of Non-member: A Non-member is someone who does not have a Medicaid ID associated with his or her identity. Do the following to add a Non-member on the “Add/Edit Individual” screen.

- Type the first name in the “First Name” field
- Type the middle initial (if known) in the “Middle Init” field
- Type the last name in the “Last Name” field
- Type any of the following items if you know them—
    - Email
    - Phone
    - Extension
- Click the “Create” button in the upper-right area of the screen (NOT shown above)
- Doing this will return you to the “Existing Individuals” screen, where you will see at the top the person you just added
- If you need to add an address for the non-member, click the pencil icon (shown below, far left) on the “Existing Individuals” screen for the person you just added:



NOTE: The above information is artificial and does NOT represent a HIPAA violation.

- Then, on the “Add/Edit Individual” screen, click the button shown below:



- Click the “Create” button on the screen it leads you to
- On the “Add/Edit Non-mbr Address” screen, type the address information and click the “Create” button. Doing this will return you to the “Add/Edit Individual” screen, where the address will show at the bottom of the screen.
- Click the “Main Page” bread crumb at the top of the screen to return to the main page.

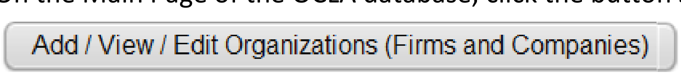
NOTE: The action you just took will cause the new Non-member name to show at the TOP of the list of names generated by the “Individual (mbr or non-mbr)” dropdown list shown in Figure 1 above. You will now be able to choose that person from the list when you create your Request.

Adding an Organization

- *Required Fields: Organization Name*

Do the following to add an Organization (e.g., firm, company, political entity, LLC, etc.) so that it will appear in the “Organization (firm or company)” list on the Request screen shown in Figure 1 above:

- On the Main Page of the OCLA database, click the button shown below:



- On the page it leads you to, click the “Create” button (middle of screen, towards top)

- On the “Add/Edit an Organization” screen, put the name of the organization in the “Name” field.
    - Note that you NEVER put the contact person’s name in this field. That goes in the “Organization Contact” field on the Request itself!
- Fill in whatever other information you know, and then click the “Create” button.
- Doing this will return you to the Main Page.

NOTE: The action you just took will cause the new Organization name to show alphabetically in the list of names generated by the “Organization (firm or company)” dropdown list shown in Figure 1 above. You will now be able to choose that Organization from the list when you create your Request.

Adding an OAG Person

- *Required Fields: First Name, Last Name*

An OAG staff member’s name has to be added in the Maintenance area of the database in order to show up in the area of the database where you choose that name to associate it with a Request.

- On the Main Page, click the “Maintenance” link in the Main Tasks area
- Click the “Add / Edit / Delete OAG Name” button
- Click the “Create” button on the next screen
- Type the person’s first name in the “First Name” field
- Type the person’s last name in the “Last Name” field
- Click the “Create” button
- Click the “Main Page” bread crumb to return to the main page

Adding an OCLA User

Do the following to add a new OCLA User. Note that this has to be done for two reasons:

1. So that the person can log into the OCLA database; and,
2. So that Requests can be assigned to the person.

- On the Main Page, click the “Maintenance” link in the Main Tasks area
- Click the “Add an OCLA User” button
- Click the “Create” button on the next screen
- Click the list button beside the “OCLA User” field
- Choose the desired name by clicking on it
- Click the “Create” button
- Click the “Main Page” bread crumb to return to the main page

Adding a Subject

Do the following to add a new Subject:

- On the Main Page, click the “Maintenance” link in the Main Tasks area
- Click the “Add / Edit / Delete a Request Subject” button

- Click the “Create” button on the next screen
- Type the subject in the Subject field
- Click the “Create” button
- Click the “Main Page” bread crumb to return to the main page

Accessing the Request Screen and Doing the Data Entry

- *Required Fields: Date Received, Request Date, Requested By, Direct Correspondence to, Assigned To, Source, Request Type, Subject*

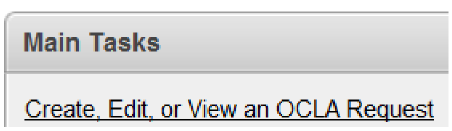
DO NOT SKIP THIS STEP: Refer to the flowchart in “Appendix A: Data Entry Flowchart” to see which path to follow for entering the different types of Requests, to include the following:

  - Member representing himself or herself
  - Family member representing a Member
  - Non-member representing himself or herself
  - Organization representing a Member or non-member
  - Organization (not representing anyone) making its own inquiry

Note that the steps in Appendix A use *the Requestor* as a starting place. In other words, the steps look at who is *making the Request*, not who the Request is about, in its approach to supplying instructions.

Do the following to access the Request screen and create a new Request:

- On the main screen, click the “Create, View, or Edit an OCLA Request” link shown below:



- On the screen it leads you to, click the “Create” button (in the middle of the screen, near the top)
- On the “Add/Edit OCLA Request” screen, click the calendar button beside the “Date Received” field and choose the date it was received. Note that doing this will AUTOMATICALLY fill in the “Request Date” field, which you CAN edit as needed.
- Choose the “Requested By” entity (e.g., individual, organization, family requestor), and note that “Direct Correspondence To” will default to whatever you chose and also is editable
- Fill in all other applicable fields. Note that NOT all fields will apply.
  - Example: If the Request was requested by an Individual for himself or herself, the “Organization” fields (e.g., Organization, Contact, Contact Email, Contact Phone Extension) will NOT apply.
- When you have typed/selected all of the information you can, click the “Create” button in the upper-right area of the screen. Doing this will return you to the “Existing OCLA Requests” screen, where the new one will appear at the TOP.

Printing the Request

After you have saved the Request, you can return to it to print it for passing along the information to another staff person or division at DMAS.

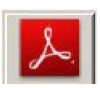
Note that the fields and format of the print version of the Request vary between PINKS and all other Request types. This means you will see some fields for PINKS that you will NOT see for other Request types, and vice versa.

Do the following to print a new Request:

The following instructions begin at the point where you have saved the Request for the first time, bounced back to the list of existing Requests, and clicked the Request's RN# to return to it.

- After returning to the new Request (see sentence above), click the "Print Request" button near the top of the screen (as shown in Figure 1 above).
- When the .pdf file launches on your screen (if it does NOT launch, see the NOTE below), click the "File" menu and choose "Print".
- Close the .dpf file by clicking the "File" menu and choosing "Close," OR close it by clicking the small "x" in the upper-right corner.

NOTE: If the .pdf file does NOT launch, then you should see a .pdf icon (shown below) in the Task Bar of your computer. The Task Bar runs horizontally along the bottom of your screen. Simply click that icon to launch the .pdf file IF it did not appear full-screen when you clicked "Print Request."



← **standard .pdf file icon**

Adding Staff Hours, Copy Costs, and Extra Costs

When you save a new Request for the first time, the area of the screen that allows you to indicate costs for staff hours, copying, and extra costs does NOT show. This is because those things do not apply at the very beginning of a Request's "life cycle." When you go back to that Request, you will see that area of the screen at the bottom.

Below is a screen shot of the "Copies and Costs" area of the screen; it is referenced in the ensuing subsections of instructions:

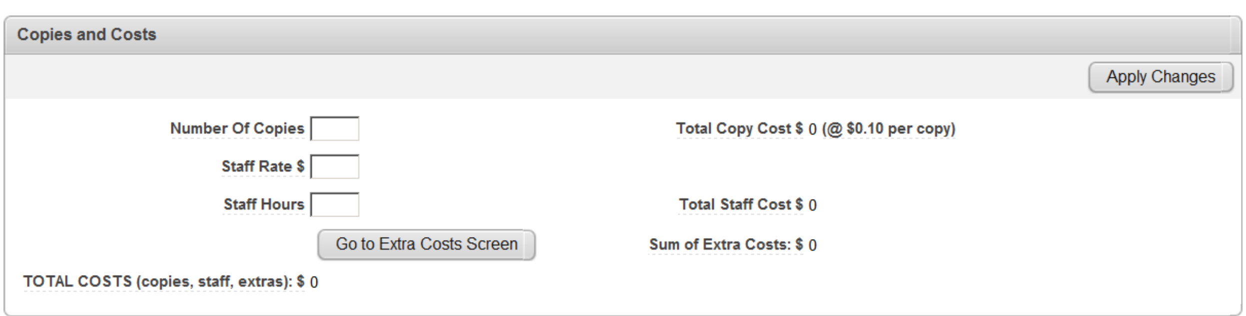


Figure 4. Copies and Costs (Location: bottom of Request screen after it has been saved).

Adding Copies / Copy Costs

Do the following to add copy costs to a Request:

- Query for the request on the "Existing OCLA Requests" screen. (This screen is accessible by the "Create, Edit, or View an OCLA Request" link in the Main Tasks area of the Main Page.)
    - If you are not sure how to query for a Request on the "Existing OCLA Requests" screen, see the subsection of this manual titled "Searching."
- Scroll to the bottom of the Request
- Type the number of copies in the "Number of Copies" field
- Click the "Apply Changes" button shown in Figure 4 above. Doing this will cause the system to multiply the number of copies you entered by the going rate ($0.10 per page at the writing of this manual) for copies, and show the total amount in the "TOTAL COSTS" area of Figure 4 above, along with any staff costs and extra costs that have entered.

Adding Staff Rates and Hours

Do the following to add staff hours and hourly rates:

- Follow the first two bullet points in the "Adding Copies / Copy Costs" subsection above
- Type the hourly rate for the staff in the "Staff Rate" field (example: 25)
- Type the number of hours in the "Staff Hours" field (example: 3.5)
- Click the "Apply Changes" button shown in Figure 4 above. Doing this will cause the system to multiply the staff hours by the staff rate and show the total amount in the "TOTAL COSTS" area of Figure 4 above, along with any copy costs and extra costs that have been entered.

Adding Extra Costs

Do the following to add such costs as UPS or other postage to a Request. Note that the subsections above provide instructions for adding copy costs and staff costs. "Extra Costs" are costs outside the scope of those things.

Do the following to individually add each line item of additional costs:

- Follow the first two bullet points in the "Adding Copies / Copy Costs" subsection above
- Click the "Go to Extra Costs Screen" button shown in Figure 4 above
- On the screen it takes you to, click the "Create" button (middle of screen towards top)
- As shown in the example of the "Add/Edit Extra Costs" screen shown in Figure 5 below, type the number of dollars in the "Cost" field and type a description of the cost in the "Description" field, but only for a single cost entry.

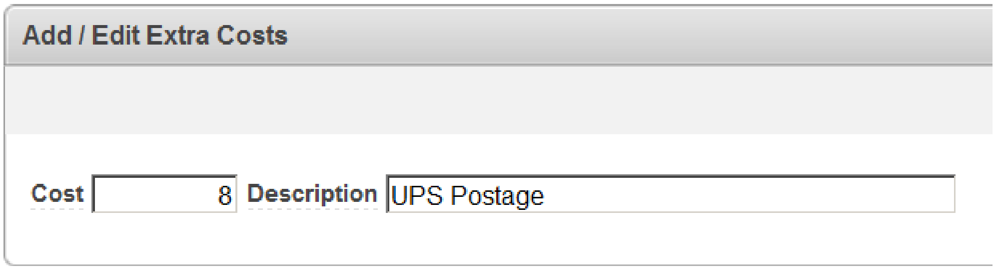


Figure 5. Add/Edit Extra Costs.

- Then, click the "Create" button in the upper-right area of the screen (NOT shown in Figure 5)
- Doing this will return you to the Request:
  - If you do NOT have a second cost, follow the next bullet point to see the extra costs
  - If you DO have a SECOND cost, *repeat the steps above for each additional cost* and then follow the next bullet point (below).
- Scroll to the bottom of the Request and look at the "Sum of Extra Costs" field (bottom left area of Request screen, as shown below) to see the total amount of the extra costs. If you entered multiple cost entries, this number will be the sum of those entries' costs. If you entered only one cost, it will be that cost's amount.

Seeing Contact Information

There are two main types of contact information for Individuals, Organizations, and Family Requestors:

- Address
- Phone and Phone Extension / Contact Person / Fax / Email

Contact information appears *at the top of the Request screen* after you have saved it once and returned to it, and the information shown is *based on whatever has been chosen in the "Direct Correspondence To" field.*

Addresses, Phones, Extensions, Faxes, and Email

Read the subsections below for information on where the contact information comes from for the different types of requestors.

For Individuals (members and non-members)

Non-members: You can store address information for Individuals who are *non-members*, but you do not have to, because that information is not always provided. For information adding addresses for non-member individuals, see the "Add a Non-member" section of this guide.

Members: Member address information is automatically pulled from VaMMIS by the database. Any phone or email information comes from the Individual screen, where you have to enter it.

For Organizations
Address, phone, and fax information comes from the Organization screen, where you add new Organizations.

Phone extension, contact person name, and contact email information comes *from the Request screen that you are on* if the corresponding fields ("Organization Contact," "Org. Contact Phone Extension," and "Organization Contact Email") have been filled in.

For Family Requestors
Address, phone, and email information for a Family requestor comes from the screen where you added that person (accessible by way of the "Add / Edit Family Requestor" button on the "Add / Edit Individual" screen).

Adding Document Attachments to a Request
As you create and send out Request-related correspondence, you may want to attach it to the associated Request. *Many or most attachments may be letters, so the on-screen button reflects that with its name, but you can add ANY type of document.*

Do the following to attach one or more documents to a Request:

- Search for the Request that you want to add a document attachment to. If you are not sure how to search for the Request, see the "Searching" subsection of this guide.
- Click the "Add Letter Attachment" button on the Request (upper portion of screen)
- Click the "Browse" button and click on the document
- Click "Open" to select it and automatically return to the screen
- As desired, type a description in the "Description" field
- Click "Attach Document" to attach it to the Request
- Click the "Add / Edit OCLA Request" bread crumb to return to the Request

NOTE: The Request will show a count of the documents added so that you do not have to leave the Request to see if there are any associated attachments.

Adding Comments to a Request
Do the following to add one or comments to a Request:

- Search for the Request that you want to add a document attachment to. If you are not sure how to search for the Request, see the "Searching" subsection of this guide.
- Click the "Comments" button (near the bottom, on the left)
- Click the "Create" button on the next screen
- Type the comment text in the "Comment Text" field
- Click the "Create" button
- Click the "Add / Edit OCLA Request" bread crumb to return to the Request

NOTE: The Request will show a count of the comments added so that you do not have to leave the Request to see if there are any associated comments.

Adding OAG Referrals to a Request

Do the following to add one or more OAG Referrals to a Request. But first, note this preliminary step:

> The OAG person you want to associate with the Request *has to have been added to the system* by way of the Maintenance screen, which is accessible from the Main Page. If you need instructions on adding an OAG person to the system, see the "Adding an OAG Person" subsection of this guide.

- Search for the Request that you want to add a document attachment to. If you are not sure how to search for the Request, see the "Searching" subsection of this guide.
- Click the "Create OAG Referral" button
- Click "Create" on the next page
- Click the list button beside the "Referred To" field and choose the desired name
- Click the "Create" button
- Click the "Add / Edit OCLA Request" bread crumb to return to the Request

NOTE: The Request will show a count of the OAG referrals added so that you do not have to leave the Request to see if there are any associated OAG referrals.

Adding DMAS Referrals to a Request

If there is only a single DMAS Referral associated with a Request, you choose the name from the "DMAS Referral" list field shown in Figure 1.

If you need to add a secondary or tertiary DMAS Referral, follow the instructions below:

- Search for the Request that you want to add a document attachment to. If you are not sure how to search for the Request, see the "Searching" subsection of this guide.
- Click the "Create Another DMAS Referral" button
- Click "Create" on the next page
- Click the list button beside the "Referred To" field and choose the desired name
- Click the "Create" button
- Click the "Add / Edit OCLA Request" bread crumb to return to the Request

NOTE: The Request will show a count of the DMAS referrals added so that you do not have to leave the Request to see if there are any associated DMAS referrals.

Searching

"Searching" is the thing you will do *mainly* to find a Request, be it a very new one, a recent one, or an old one. This subsection categorizes search procedures for Requests by relative age, since there are different points of access that have to do with the age (and also the status, as open or closed) of a given Request. For example, if a Request is very new (and thus still open), it is easily accessible on the Main Page. A closed Request, however, would be accessible from a different place in the application.

Review the subsection titles below, and follow the corresponding instructions for the type of Request you are interested in finding.

Note that searching works the same way on other screens where you see the looking-glass icon shown in Figure 6 on the next page. For example, where you see that icon on the list of existing Individuals, you might decide to search for an Individual whose name may already be in the system.

Finding Open Requests Assigned Only to You

After you have found the Request you are looking for using the instructions below, refer to the "Viewing / Editing Open Requests" section of this guide for information on how to update the Request.

To see Requests assigned to only you that do not have a "Closed Date" date, do the following:

- On the Main Page, click the "View, Print, Edit My Open Assignments" link in the Main Tasks area of the screen
- Find the desired Request in the list of your Requests. Note that they are in ascending order of Request Date
- Click the "RN#" to go to the desired Request

NOTE: You can print a report or spreadsheet of the list of your open Requests by using either of the "print" options at the bottom of the list.

Finding Recent (and still Open) Requests, Regardless of "Assigned To"

Requests that do not yet have a date in their "Closed Date" fields are shown for your convenience on the Main Page in the "All Requests Due within 8 Days (in ascending order of Request Date" area of the screen. Requests appear in the list in ascending order of "Request Date" (so that the older ones are first in the list).

Look for the desired Request in that list by looking at any of its values (e.g., RN#, Request Date, Individual, etc.).

Access any of them by clicking the "RN#" for it. The underline indicates that the field is a link that will take you to the actual Request.

Finding Older Requests, Open or Closed

There are two places to find older Requests that are either open or closed. The subsections below describe these places and methods.

Note that both of these places include the *search tool* shown below, which allows you to search for ANY value in ANY field that you see on the screen where you see the tool. For example, on the "Existing OCLA Requests" page, which features this tool, there are 8 fields shown (RN#, Requested By, Individual, Organization, etc.). The tool shown below allows you to search those fields for a value. If you wanted to see the Requests for Organization "ABC Company," you could do that. See the "Using the Existing OCLA Requests Page" subsection below for information on how to use the search feature shown in Figure 6 below.

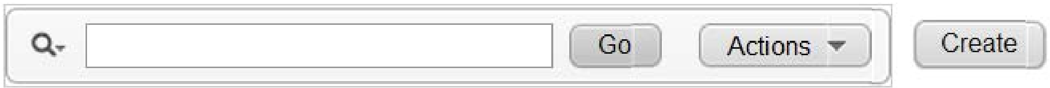


Figure 6. Search Tool.

Using the "Existing OCLA Requests" Page

The "Existing OCLA Requests" page provides a list of ALL existing Requests and features the search tool shown in Figure 6 above.

Note that this method of accessing Requests is *abridged*, in that it does not offer query access to ALL of the Request screen fields. As shown in Figure 7 below, this page allows you to search for an existing Request on *only eight of the Request screen fields*.

To search for a Request using Request page fields that are NOT shown in Figure 7 below, go to the next subsection ("Using the Reports Page for an Unabridged Search").

Otherwise, to search for a Request using one of the fields shown in Figure 7 below, do the following:

- Click the looking-glass icon on the left side of the tool shown below to generate a list of searchable fields for that page, as shown in Figure 7 below.

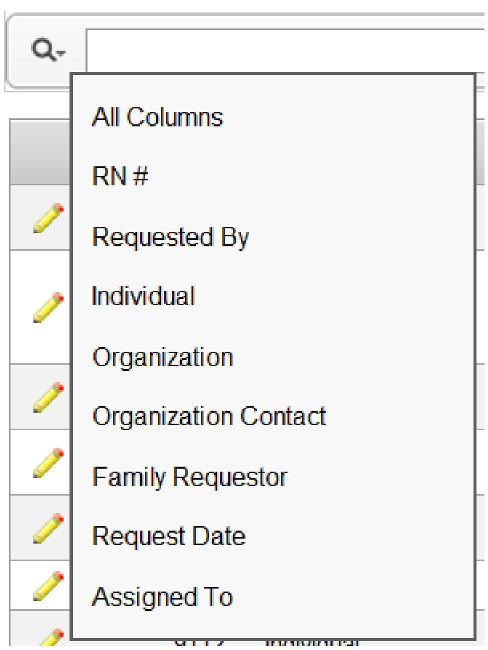


Figure 7. Searchable Fields on the "Existing OCLA Requests" Page.

- Choose the field you would like to search on (to find the desired Request) by clicking on it
- Type *any number of characters* representing what you want to find.
    - <u>Example</u>: Figure 8 below shows an example of searching for “LeClair Ryan” law firm (which is an Organization, and is thus why “Organization” was chosen as the field) by typing only “Le”:

Figure 8. Example of Searching on a Chosen Field.

- Click “Go” (shown in Figure 8 above), and note the restricted list of Requests that appears. Only shown will be those Requests whose field you chose for the search have some or all of the value you typed in the previous step.
- Next, you can do either of the following:
    - Go to the desired Request by clicking its “RN#”; or,
    - Cancel the search (and do another one if desired) by clicking the red “X” next to the system-generated description of the search you just did, as shown in Figure 9 below:

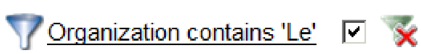


Figure 9. System-generated Description of Your Search and Cancel Icon (e.g., Red “X”).

Using the “Reports” page for an Unabridged Request Search

The Reports page offers a single report that allows you to search for:

- ANY Request, using
- ANY value*, for
- ANY field on the Request screen

*A “value” is whatever text you entered in a field on the Request screen. For example, “Sue Jones” might be a “value” in the “Individual” field where you indicate who initiated the Request. Likewise, “02/14/2013” is a “value” that could appear in any date field on the Request screen. “Values” are the text you entered or chose for a list field; fields are the on-screen places where you typed or selected those values.

In other words, this report allows you *the most flexible searching possible*, because it lets you choose what field you want to use to search, and it lets you provide the value you want to search on for that field.

Do the following to access the report and leverage its flexibility:

- On the Main Page, click the “Reports” link in the Main Tasks area
- Click the “ALL OCLA Requests (Open and Closed)” button

- Click the looking-glass icon on the left side as shown in Figure 10 below. Doing this will provide a list of ALL fields on the Request screen.

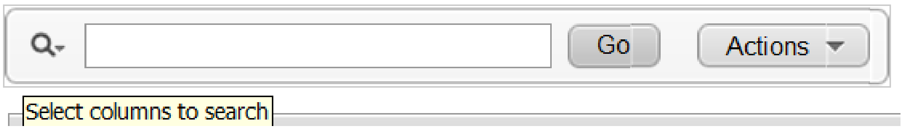


Figure 10. Looking-glass for Choosing "columns to search".

- Click on the name of the field that you want to search. Examples are as follows:
    - If you want to search for all Requests whose "Request Type" field has 'FOIA' as the selection, click the "Request Type" field to select it
    - If you want to search for all Requests whose "Organization" field has 'Williams Mullen' law firm as the selection, click the "Organization" field to select it
    - If you want to search for all Requests whose "Source" has 'Sheriff' as the selection, click the "Source" field to select it
- After you have selected the field you want to search, type ANY letters for the value you want to find. Examples are as follows:
    - If you chose "Request Type" as the field and want to find all 'FOIA' Requests, type "FOIA" (or "FO," since you can use ANY number of the letters as long as you type them in order)
    - If you chose "Organization" as the field and want to find 'Williams Mullen' Requests, type ANY sequence of those letters (e.g., "Will" or "Williams" or "Mul" or "Mullen", etc.)
    - If you chose "Source" as the field and want to find all 'Sheriff' sources, type any sequence of those letters (e.g., "Sheriff" or "Sher" or "She", etc.)
- After you have typed what you are looking for in the field you chose, click "Go". Doing this will restrict the list of Requests that you see to ONLY those that meet the criterion you supplied.
    - You can undo (i.e., cancel) that restriction by clicking the red "X" shown in Figure 9 above. Doing that will return you to the full list of existing Requests.
- To see any given Request in the list returned by your search, click the "RN#". Its underline indicates that it is a link field that will take you directly to the Request.
- To go back to the Main Page, click the "Main Page" bread crumb from any screen

NOTE: The unrestricted reports page allows you to create and save customized reports. This comes in handy if you decide there are things you want to check on periodically. See the "Creating a Custom Report" subsection below for instructions on creating customized reports on the unrestricted reports page.

Searching for Things You are Not Sure How to Find

Every so often you will have a need to find some data in the system that either you are not sure how to find, or you think the system is not set up to find. This happens in other DMAS systems, too. The development process accounts for standard types of inquiries, but there is often an inquiry that comes from outside the users' division, and that the users are not sure how to answer. When this happens, contact the person who developed the system (or her replacement) and ask for help with the inquiry.

There is an Oracle tool that he or she can use to get at the data from the "back end," or the database—without using the user interface. Liza Steele developed the OCLA Database. Ask her or her replacement for help.

Viewing / Editing Open Requests

An "open" Request is one that does not yet have a date in the "Closed Date" field shown in Figure 1 above.

There are two main ways to view an open Request: You can all view open Requests that are due in the next 8 days (or are overdue), and you can view open Requests that have been assigned to *you only.*

Decide which type of open Requests you want to view, and follow the corresponding instructions below.

Viewing, Printing, Editing Requests Due in the Next 8 Days

A request is "due" if it does not have a date in the "Closed Date" field.

To view all Requests that are either due in the next 8 days or are overdue, look at the report of that title on the Main Page. To view or edit one or more of those Requests, click its pencil icon.

To print the list of open assignments, click either print option (e.g., spreadsheet or report) at the bottom of the list of open Requests.

Viewing, Printing, or Editing "My" Open Requests

If you want to see open Requests that are assigned to you, click the "View, Print, Edit My Open Assignments" link in the Main Tasks area of the Main Page. Then, click the underlined RN# of any Request that you want to see or edit.

To print the list of your open assignments, click either print option (e.g., spreadsheet or report) at the bottom of your list of open Requests.

Interpreting Error Messages

The primary goal of all error messages is to do one or more of the following things in regards to the data associated with the screen you are on when you see the error message:

1. Disallow duplication
   - ➢ Example: If you are adding an Individual who is a Member and has already been added, the system will stop you with an error message telling you that the person has already been saved to the system.

2. Demand completeness
   - ➢ Example: If you enter a Contact Phone Extension on the Request screen but you have not typed the name of the Organization Contact, the system will stop you and tell you to type the name of the person whose phone extension you are entering.

3. Require correctness
   - Example: If you are on the “Add / Edit Individual” page for someone who is a Member (meaning they have a Medicaid ID) and you click and you click the “Add / Edit a Non-mbr Address” button, the system will stop you, because you do not add addresses for Members. The system automatically selects those addresses and shows them at the top of the Request page after you choose an Individual who is a Member and save the Request.

Knowing what Tool was Used to Create the OCLA Database

Oracle Corporation’s Application Express (“APEX”) is the Web-enabled tool that was used to create the OCLA Database.

Appendix A: Data Entry Flowchart

Is the requestor an Individual (either a Member or a Non-member) *inquiring for himself or herself*?

Yes

Go to the Individuals screen and add the person

Create a new Request, and:

- Choose Individual from the "Requested By" dropdown list
- Choose Individual from the "Direct Correspondence To" dropdown list
- Choose the person's name from the "Individual (mbr or non-mbr)" dropdown list

No

Is the requestor a Member's relative?

Yes

- Go to the Individuals screen and add the Member
- Click the "Add/Edit Family Requestor button" and add the family member

Create a new Request, and:

- Choose Family Requestor from the "Requested By" dropdown list
- Choose Family Requestor from the "Direct Correspondence To" dropdown list
- Choose the Member's name from the "Individual (mbr or non-mbr)" dropdown list

No

Is the requestor a representative of an Organization?

Yes

Is the Organization representing an Individual (mbr or non-mbr)?

Yes

Go to the Individuals screen and add the person that the Organization is representing

Go to the Organization screen and add the Organization **IF** it is not already there

Create a new Request, and:

- Choose Organization from the "Requested By" dropdown list
- Choose Organization from the "Direct Correspondence To" dropdown list
- Choose the individual's name from the "Individual (mbr or non-mbr)" dropdown list
- Type the name of the Organization's representative in the "Organization Contact" field

No

Go to the Organization screen and add the Organization **IF** it is not already there

Create a new Request, and:

- Choose Organization from the "Requested By" dropdown list
- Choose Organization from the "Direct Correspondence To" dropdown list
- Type the name of the Organization's representative in the Organization Contact field