



LOUISIANA DEPT. OF HEALTH & HOSPITALS

Medicaid Eligibility Data System

External Design Part 1e:

Core System Budget

Templates

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Document Information

Created for: Louisiana Dept. of Health & Hospitals
Project Name: Medicaid Eligibility Data System
Project Abbreviation: MEDS
Document Title: External Design Part 1e: Core System Budget Templates
Document Subject:
Revision Number: 69 (incremented each time the document is saved)
Status: Final
Last Saved: Dec 16, 2011 04:06:00 PM
Printed: Dec 16, 2011 04:06:00 PM
Comments:
Document Template: RedManeSpec_W2000.dot

Revision Summary

The following revisions have been made to the document since it was first published:

Date	Description of Change	By
4/29/2003	Revised with RedMane Templates	M. Smutko
6/2/2003	Add (L)ast action to view previous record – SIR799	L. Nel
6/20/2003	Add function to update Template Instructions – SIR873	L. Nel
6/30/2003	Copy Category/type cases linked to template version – SIR882	L. Nel
9/10/2003	Add new operator FM – First Month – SIR783	L. Nel
9/10/2003	Add new operator AM – Add Multiple – SIR903	L. Nel
12/30/2003	Add Medicaid Purchase Plan – SIR784	L. Nel
10/05/2004	Add changes for SIR 803/849 – Hardcoding on Champ&Lachip and HIFA Waiver Report	P. Crowley
2/28/2008	Add changes for SIR1407 – FOA and update the Reporting and Calculation line types to be in sync with Production	N. Wells
7/23/2008	Change the way PR (prorate) is calculated – used for PLI.	K. Powers
5/23/2011	Documentation cleanup – SIR1701	E. Fontes

Budget Templates

Template Maintenance

```

Message Line ...
  TMPL                *** M.E.D.SYSTEM ***                *DATE
  MEBTMPF             BUDGET TEMPLATE MAINTENANCE          *TIME

Action                : _ (A,B,C,D,M,N,P,L)
*TEMPLATE ID         : _____
Template Name        : _____
Template Instr       : _____ +
*Calculation Period : _ Desc
Rounding Required   : _ (Y/N)

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit                      Vrsn
  
```

This function describes the template and how the income values will be presented in any budget using this template.

Fields

Action (A1)

The action codes for this field are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (P)urge, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered, e.g. 'LIFC', 'CHAMP', 'SSI' etc.

Template Name (A30)

The name to appear on the heading of the form will be entered, e.g. 'LIFC RELATED PROGRAMS'.

Template Instructions (5 * A45)

General instructions to workers on when to use this form and how to complete it. For example, 'Begin with the budget calculation for the primary applicant'. This is an optional 'moreable' field.

Calculation Period (A1)

The period upon which the budget calculations will be based. Valid periods will be M(onthly) or Q(arterly).

Rounding Required (A1)

This indicator is to be used to tell the system whether rounding is required when calculating the budget gross earned income. Valid values will be (Y)es or (N)o.

Additional PF Keys

PF Key 9 - Vrsn

This key will point to the Template Version Maintenance screen.

Processing Notes

The template can only be purged if no versions of the template have been released (i.e. there are no Versions of the template with a status of 'current' or 'obsolete'). A 'purge' will result in the template, its template version/type cases, versions, sections and lines being deleted. The user will confirm the 'purge'.

Technical Note: When purging the components of a template (from the template object subprogram), start at the lowest level (i.e., template lines) object subprogram and work your way up to the top - this will preserve the cascading purge edits.

Budget Template Version Maintenance

```

Message Line ...
VRSN                      *** M.E.D.SYSTEM ***                *DATE
MEBTVRF                   BUDGET TEMPLATE VERSION MAINTENANCE  *TIME

*Action      : _ (A,B,C,D,M,N,P,L)
*TEMPLATE ID : _____ Desc
*TEMPLATE VERSION: _____
*Status      : _ Desc           Effective Date: MM/DD/YYYY
Release Date : _ / _ / _____ Superseded Date: MM/DD/YYYY
*Additional Edits: _ Desc
Notes       : _____ +

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit          Tmpl      Link Sctn Val

```

A template has many versions throughout its life. For example, a LIFC template could have a January 1997 version and a January 1998 version. Each version will relate to the same type case, i.e. the same template, but may have different lines in each of the sections.

Fields

Action (A1)

The action codes for this field are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (P)urge, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered, e.g. 'LIFC', 'CHAMP', 'SSI' etc. The template name will be displayed once the id is known.

TEMPLATE VERSION (A4)

Mandatory field. The version number will be entered in MMY format. It will indicate the approximate month that the version becomes effective. The version will default to the current month on an Add action. It will be used as a label to identify the version and not as the actual effective date of the version.

Status (A1)

The status of the version:

- | | |
|------------|--|
| P(ending) | The version is in a state of composition. |
| T(est) | The version is complete and is being tested against real cases. However, budget worksheets cannot be used for eligibility determination. |
| C(urrent) | The version has been released for general use. |
| O(bsolute) | The version is no longer in general use. It could, however, be used for |

retroactive budget worksheets.

X(Cancelled) The version is never released into circulation.

Technical Note: Statuses will be kept in an LDA (codes and descriptions).

Release Date (N8)

A future date when the template version will be released into circulation. A release date is only allowed on records in Test status.

A process will be run in a daily batch run to update the status of these releases to Current. The current version will be updated to Obsolete status with its Superseded Date set to the Release Date of the new version. The test version will then be made current with its Effective Date set to its Release date and finally its Release Date is set to zero.

Effective Date (N8)

Output only. The date on which the status of the version changed from Test to Current. This field will be blank if the status is Pending or Test.

Superseded Date (N8)

Output only. The date on which the status of the version changed from Current to Obsolete.

Additional Edits (A1)

Required. This code indicates whether additional edits must be performed. A description of this code is displayed. PF1 Help is available on this field. Valid values are (from METBAEL):

- I Ineligible (perform these edits if the outcome of the budget is ineligible)
- E Eligible (perform these edits if the outcome of the budget is eligible)
- B Both (perform these edits if the outcome of the budget is either eligible or ineligible)
- N No additional edits will be performed.

The four values for the Additional Edits indicator are used to determine when we do the additional edits needed to refer the worker to other templates.

- For the LaCHIP/Champ type cases we only refer the worker to other templates if the outcome of the budget is **ineligible**. The indicator is set to 'I' - Ineligible (perform these edits if the outcome of the budget is ineligible) on all LaCHIP/Champ templates.
- For QMB/SLMB/Q11 **eligible or ineligible budgets**, we refer the worker to the appropriate budget based on FPIG. The indicator is set to 'B' - Both (perform these edits if the outcome of the budget is either eligible or ineligible) on all QMB/SLMB/Q11 templates.
- For all other type cases we don't do any additional edits. The indicator is set to 'N' - No additional edits will be performed on all other templates.

Currently we won't use the value of 'E' - Eligible (perform these edits if the outcome of the budget is eligible).

Version Notes (5 * A45)

Free format notes explaining the version release and any other general notes on the version. For example, why it was superseded, any known errors, etc. This is an optional 'moreable' field.

Additional PF Keys

PF Key 6 - Tmpl

This key will point to the Template Maintenance screen.

PF Key 8 – Link

This key will point to the Template Version / Type Case Link screen.

PF Key 9 – Sctn

This key will point to the Template Section Maintenance screen.

PF Key 10 - Val

This key will point to Validate Processing (discussed below).

Processing Notes

For an Add action, there cannot be another version in Pending or Test status for this Template. Only version notes will be entered. All other fields are output only. The system will create the version in a Pending status, when it is added.

The version notes can always be modified - this will apply to all templates in any status.

Allowable status changes from the maintenance screen:

Pending to Test

The system will validate that the entire template is complete and has been '>validated' (See Validation Processing).

Pending to Canceled

No validation will be necessary.

Test to Pending

No validation will be necessary.

Current to Obsolete

The version will become obsolete. There will be no current version in its place. If type cases are linked to this template, they can no longer be calculated. The user will confirm that this template will be removed from circulation - the system will not be able to calculate budgets using this template.

Test to Canceled

No validation will be necessary.

Canceled to Pending

A canceled version is brought back into effect. No validation is necessary. The process will ensure that the template is valid before releasing it into circulation.

Validate Processing

The validate process can be initiated via a PF Key or when the user changes the status from Pending to Test. This process will check that the template version is valid for release into circulation.

1. The template must have an eligibility section with one and only one line defined as the 'Final Eligible Amount' line.
2. The template must not have more than one section for each of the following types: PR(etest), EL(igibility), SD(Spenddown) and CO(la).
3. Each Member Calculation section may have one and only one carried forward figure for Total Countable Income. It may also have one and only one carried forward figure for Unearned Income and have one and only one carried forward figure for Earned Income. Each Member Calculation section may also have one and only one carried forward figure for Countable Unearned Income and have one and only one carried forward figure for Countable Earned Income.

4. Formulae for all calculation type lines must only be in sections that are allowed such lines (Pretest, Eligibility, Member Calculation, and Post Eligibility).
5. All sections must have lines.
6. All sections must be in status complete'.
7. If a line has a line type of B, there must be a Spenddown section.
8. If a line has a line type of E, there must be a COLA section.
9. If a line has a line type of S, G or H, there must be at least one Member Calculation section.
10. Each member calculation section must have its line numbers corresponding to totals entered (Countable Income, Countable Unearned Income, Countable Earned Income, Unearned Income, Earned Income and blank are the only line value types allowed for lines belonging to a CM section).
11. If a line on a non deeming CM section in a quarterly template has a line type I (sum earned income) or Z (sum of unearned income), the line value type may only be set in another non deeming CM section.

Technical Note: The total - countable income - is mandatory and can be used to check that these totals have been entered.

The version will only be purged if the version status is pending. If the version is purged, all the type case links will be purged, all the sections will be purged, and all lines for these sections will be purged.

Template Version / Type Case Link

```

Message Line ...
LINK                *** M.E.D.SYSTEM ***                *DATE
MEBTTCF            TEMPLATE VERSION / TYPE CASE LINK      *TIME

*Action             : _ (B,C,D,M,N,L)
*TEMPLATE ID       : _____ Desc
*TEMPLATE VERSION:  _____ Version Status: Desc

*Cmd  *CATEGORY/*TYPE CASE
-----
-  _____ Desc

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit          Vrsn Back Fwrds Sctn
    
```

This function links a template version to category type cases. A template can be used by many type cases (e.g., MNP can use the same template as MNP Spenddown), however, a type case can only be used on one template version at a time.

Fields

Action (A1)

The action codes for this field are (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered, e.g. >LIFC=, >CHAMP=, >SSI= etc. The name of the template (A40) will be displayed.

TEMPLATE VERSION (A4)

Mandatory field. Unique identifier of a template version.

Version Status (A1)

- P(ending) The version is in a state of composition.
- T(est) The version is complete and is being tested against real cases. However, budget worksheets cannot be used for eligibility determination.
- C(urrent) The version has been released for general use.
- O(bsolete) The version is no longer in general use. It could, however, be used for retroactive budget worksheets.
- X(Cancelled) The version is never released into circulation.

Command (A1)

The action to be taken on the line. This field is optional. Valid commands are: (A)dd, (M)odify, (P)urge.

CATEGORY (N3)

The code identifying the category will be entered, e.g. 03, 05.

TYPE CASE (N3)

The code identifying the type case will be entered. The name of the type case (A20) will be displayed.

Additional PF Keys**PF Key 6 - Vrsn**

This key will point to the Template Version Maintenance screen.

PF Key 9 - Sctn

This key will point to the Section maintenance screen.

Processing Notes

A link will only be added/deleted while the version is pending. If any template line uses the "NM" operator, only Type Cases that allow Earned Income Exemptions can be added.

Budget Template Section Maintenance

```

Message Line ...
  SCTN                      *** M.E.D.SYSTEM ***          *DATE
  MEBTSCF                   BUDGET TEMPLATE SECTION MAINTENANCE *TIME

*Action                      : _ (A,B,C,D,M,N,P,L)
*TEMPLATE ID                 : _____
*TEMPLATE VERSION            : _____ Version Status :
*SECTION ID                  : _____

  Section Name                : _____
*Status                      : _
*Section Type                 : _
  Section Instr               : _____ +
  Multiple Allowed            : _ (Y/N)
  Deeming Sctn Indic         : _ (Y/N)
  Student Pretest Indic      : _ (Y/N)

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit      Link      Sln  Copy  Vrsn
  
```

A section describes a part of the template. For example, a LIFC form has a section for capturing the income of the head of the household, a section for capturing the income of the stepparent, a section for comparing the incomes of the various household members against a standard income level.

Fields

Action (A1)

The action codes for this field are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (P)urge, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered, e.g. >LIFC=, >CHAMP=, >SSI= etc. The template name will be displayed once the id is known. If entering this screen from Version Maintenance, the template id will be passed through.

TEMPLATE VERSION (A4)

Mandatory field. The version number will be entered in MMY format. If entering this screen from Version Maintenance, the template version will be passed through.

Version Status (A10)

A description of the status of the version will be displayed.

SECTION ID (A12)

Mandatory field. The code identifying the section.

Section Name (A50)

The user will enter a name of the section.

Status (A1)

The status of the section will be displayed. The user can change the status, but only when the template version is 'pending'. Valid statuses are Complete and Incomplete. The system will set the status to Incomplete on an Add action. After the completion of a section, the user will set the status

to Complete if the section has existing lines and none are incomplete. A description of the status will be displayed.

Section Type (A2)

The section type will be entered. Valid section types are:

- PR - Pretest
- EL - Eligibility
- CM - Member Calculation
- SD - Spenddown
- CO - Benefit Amount deducting COLA %.
- PE - Post Eligibility
- PC - Post Eligibility Completion section.

Technical Note: The user cannot enter a PC section. The PC section will be system generated if necessary.

Instructions (5 * A45)

The user will enter the instructions for the worker to follow when completing a budget worksheet. This is an optional >moreable= field.

Multiple Allowed Indicator (A1)

An indicator to say whether the user can allocate this section multiple times within the same budget. This field is only applicable when the section type is CM or CO – all other section types are only available once in a budget i.e. the indicator will be defaulted to (Y) for CM and CO sections and (N) for all other section types. Valid values are (Y)es and (N)o.

Deeming Section Indicator (A1)

An indicator to say whether this section will be a deeming section. Only use this indicator if we want to force the capture of this CM section before the capture of the other CM sections. That is, CM sections with this indicator set to 'Y' will be captured before other CM sections which have this indicator set to 'N'. This is useful because line values from one CM section may be used on a following CM section by the use of the Line Value Type and Line Type fields. This field is only applicable when the section type is CM and the indicator will be defaulted to (N) for all section types. Valid values are (Y)es and (N)o.

Student Pretest Indicator (A1)

An indicator to say whether this section is a Student Pretest section. Only use this indicator if we only want to calculate this pretest for budgets with a student on them. If this indicator is set the pretest will not be done for budgets that don't have at least one IU member with the student indicator set to Y. This field is only applicable when the section type is PR. The indicator will be defaulted to (N) for all section types. Valid values are (Y)es and (N)o.

Additional PF Keys

PF Key 6 – Link

This key will point to the Template Version / Type Case Link screen.

PF Key 9 - Sln

This key will point to the Section Line Maintenance screen.

PF Key 10 - Copy

This key will point to the Copy facility.

PF Key 11 - Vrsn

This key will point to the template Version Maintenance screen.

Processing Notes

A section will only be added while the version is pending.

A version may have only 1 pretest section. It may have only 1 eligibility section. It may have only 1 Spenddown section and 1 COLA section.

The section will be created and marked as 'Incomplete', for an Add action. The user will set the section to 'complete' once all lines have been completed for the section (see Section line Maintenance). If the user changes the status to 'complete' in this function, the system will ensure that the section has lines and that they are complete. Also, all line operands are checked to exist before allowing the status change.

The only attributes which will be modifiable are the Section name, Section status, Section Instructions, Multiple Allowed Indicator and Deeming Section Indicator. The Section name and instructions can be modified at any time. The Section type can never be modified. All other attributes can only be modified if the version status is pending.

The section could be purged only while the version is in pending status. A purge will result in the purging of the section and all its related lines.

The user might capture more than one section before selecting to process the lines in each of the sections. A function key will be available to go to the section line maintenance function once the user has completed section maintenance. The user could also go to or return to Version maintenance.

Budget Template Section Line Maintenance

Screen 1: Member Calculation (CM), Post Eligibility (PE), Eligibility (EL), Pretest (PR)

```

Message Line
  SLN                      *** M.E.D. SYSTEM ***          *DATE
  MEBTSLF                   BUDGET TEMPLATE SECTION LINE MAINTENANCE *TIME
                                                                *LIBRARY-ID

*Action                    : _ (C,D,M,N,L)
*TEMPLATE ID               : _____ Desc
*TEMPLATE VERSION          : _____ Version Status: Desc
*SECTION ID                : _____ Desc
  Section Type             : _ Desc

*Cmd Line Description      Ln *Calculation          *Reporting
                          Tp Line Identifier          Line Identifier
-----
-  _  _____          _ Desc                    _ Desc

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11--PF12---
      Help Main Retn Quit          Sctn Back Fwd Line Rnbr          Instr
    
```

Screen Description

This screen will be used for the following section types:

CM – Member Calculation section

A Member Calculation section describes the part of the budget that must be completed for each member in the income unit if they are providing income to the assistance unit. The lines will describe what the worker will see when capturing the budget and what the worker will be required to capture when processing the budget.

EL – Eligibility section

An Eligibility section is always included in every template. However, the Eligibility section can be presented differently to the worker depending on the type case, i.e. the Eligibility section for LIFC is different to CHAMP.

PR – Pretest section

The Pretest section is required for specific templates (only PAP and LIFC templates). This section will describe how the Pretest section is presented to the worker when capturing a budget for this type case.

PE – Post Eligibility section

The Post Eligibility section is required for specific templates (only LTC templates). This section will describe how the Post Eligibility section is presented to the worker when capturing a budget for this type case.

Fields

Action (A1)

The action codes for this field are (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered. The template name will be displayed once the id is known. It will be passed through if entering this function from the Budget Template Section Maintenance.

TEMPLATE VERSION (A4)

Mandatory field. The version number will be entered in MMY format. It will be passed through if entering this function from the Budget Template Section Maintenance.

Version Status (A10)

A description of the status of the version will be displayed.

SECTION ID (A12)

Mandatory field. The code identifying the section will be entered. The name of the section will be displayed. It will be passed through if entering this function from the Budget Template Section Maintenance.

Section Type (A2)

The section type code will be displayed with its description.

Command (A1)

The command that the system will take for the line. Valid commands are A(dd), M(odify), P(urge).

LINE (N4)

The number of the line will be entered if an Action has been entered.

Line Description (A40)

A description of the line will be entered. This description will be displayed to the worker when the worker is capturing the budget. The description will only be entered for an Add action.

Line Type (A2)

Output only field.

Calculation Line Identifier (A1)

This field identifies a line on a budget for calculation purposes. This field is optional on any specific line. Every value can only be specified on one line per section. This validation is checked before the section status is changed to 'complete'. Only Line Identifiers with 'Used for' = 'C' are valid and a Line Identifier can only be used on any of the sections specified on the new screen (page 38). PF1 Help is available for this field and only the Calculation Line Identifiers appear on the help browse. For valid values see Calculation Line Identifiers – page 42.

Reporting Line Identifier (A1)

This field identifies a line on a budget for reporting / editing purposes. This field is optional on any specific line. Every value can only be specified on one line per section. This validation is checked before the section status is changed to 'complete'. Only Line Identifiers with 'Used for' = 'R' are valid and a Line Identifier can only be used on any of the sections specified on the new screen (page 38). PF1 Help is available for this field and only the Reporting Line Identifiers appear on the help browse.

Note: A specific line can have both a Calculation and a Reporting Line Identifier.

Additional PF Keys

PF Key 6 - Sctn

This key will point to the Section Maintenance screen.

PF Key 9 - Line

This key will point to the Line Maintenance screen. The system will invoke the line maintenance function for the line for which the cursor is positioned on when pressing 'PF9'. If the cursor is not positioned on any of the lines the first line will be displayed on the Line Maintenance screen. The user can then by use of the "Next" action, maintain each of the lines for the chosen section. The user could then process the next section of lines.

PF Key 10 - Rnbr

This key will renumber the lines.

PF Key 12 - Instr

This key will point to the Template Line Instruction Maintenance screen.

Processing Notes

The system will create a Post Eligibility Completion (PC) Section if the section type is Post Eligibility (PE) and no PC section already exists in the template.

Screen 2: Spenddown (SD)

```

Message Line ...
  SLN                      *** M.E.D.SYSTEM ***          *DATE
  MEBTSLF                  BUDGET TEMPLATE SECTION LINE MAINTENANCE *TIME

*Action      : _ (C,D,M,N,L)
*TEMPLATE ID : _____ Desc
*TEMPLATE VERSION: _____ Version Status : Desc
*SECTION ID  : _____ Desc
  Section Type : _ Desc

*Cmd  LINE  Line Description  Instr
-----
-     -     -                 +
-     -     -                 +
-     -     -                 +
-     -     -                 +
-     -     -                 +
-     -     -                 +
-     -     -                 +
-     -     -                 +

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit          Sctn  Back  Fwrd          Rnbr          Instr
    
```

The Spenddown section is only available for certain type cases. The section will describe how the worker will enter the medical bills when capturing a Spenddown budget.

Fields

Action (A1)

The action codes for this field are (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered. The template name will be displayed once the id is known. It will be passed through if entering this function from the Budget Template Section Maintenance.

TEMPLATE VERSION (A4)

Mandatory field. The version number will be entered in MMY format. It will be passed through if entering this function from the Budget Template Section Maintenance.

SECTION ID (A12)

Mandatory field. The code identifying the section will be entered. The name of the section will be displayed. It will be passed through if entering this function from the Budget Template Section Maintenance.

Version Status (A10)

A description of the status of the version will be displayed.

Section Type (A2)

The section type code will be displayed with its description.

Command (A1)

The command that the system will take for the line. Valid commands are A(dd), M(odify), P(urge).

LINE (N4)

The number of the line will be entered if an Action has been entered.

Line Description (A30)

A description of the line will be entered. This description will be displayed to the worker when the worker is capturing the budget. The description will only be entered for an Add action.

Instructions (A1)

This is an optional 'moreable' field that allows the entry of line instructions.

Additional PF Keys**PF Key 6 - Sctn**

This key will point to the Section Maintenance screen.

PF Key 10 - Rnbr

This key will renumber the lines.

PF Key 12 - Instr

This key will point to the Template Line Instruction Maintenance screen.

Processing Notes

The Spenddown section is different. The user will decide how many medical bills will be allowed (the maximum number). When displaying this section in a budget worksheet, the worker will be able to enter the date of the expense, the description of the expense and the amount of the expense.

The user, creating the template, could enter a standard description in each line of the template, e.g. '>Medical Bill Description'. This description will be displayed to the worker when the worker is completing a Spenddown section in a budget. The worker will be able to overwrite this description with a more appropriate description.

Section lines may only be added or purged when the status of the Section is 'incomplete'.

Technical Note: The lines in the Spenddown section are added with a status of 'complete' as the user does not have to go to the Template Line Maintenance function to complete them.

Screen 3: COLA (CO)

```

Message Line ...
  SLN                                     *** M.E.D.SYSTEM ***          *DATE
  MEBTSLF                               BUDGET TEMPLATE SECTION LINE MAINTENANCE      *TIME

*Action      : _ (C,D,M,N,L)
*TEMPLATE ID : _____ Desc
*TEMPLATE VERSION: _____ Version Status : Desc
*SECTION ID  : _____ Desc
  Section Type : _ Desc

*Cmd  LINE   Year  COLA % Instr
-----
-     _____  _____  _____  +
-     _____  _____  _____  +
-     _____  _____  _____  +
-     _____  _____  _____  +
-     _____  _____  _____  +
-     _____  _____  _____  +
-     _____  _____  _____  +
-     _____  _____  _____  +
-     _____  _____  _____  +

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit          Sctn Back Fwrld          Rnbr Instr
    
```

Certain type cases have a COLA section in the budget. This section describes the percentages that will be used for adjustment purposes in the budgets using this template.

Fields

Action (A1)

The action codes for this field are (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered. The template name will be displayed once the id is known. It will be passed through if entering this function from the Budget Template Section Maintenance.

TEMPLATE VERSION (A4)

Mandatory field. The version number will be entered in MMY format. It will be passed through if entering this function from the Budget Template Section Maintenance.

SECTION ID (A12)

Mandatory field. The code identifying the section will be entered. The name of the section will be displayed. It will be passed through if entering this function from the Budget Template Section Maintenance.

Version Status (A10)

A description of the status of the version will be displayed.

Section Type (A2)

The section type code will be displayed with its description.

Command (A1)

The command that the system will take for the line. Valid commands are A(dd), M(odify), P(urge).

LINE (N4)

The number of the line will be entered if an Action has been entered.

Year (N4)

The year will be entered if an action is entered. The year will be entered in YYYY format. The system will check that the years are entered in descending order, incremented by one in ascending line number order.

COLA % (N3.1)

The percentage will be entered if an action is entered. The percentage must be greater than zero.

Instructions (A1)

This is an optional >moreable= field that allows the entry of line instructions.

Additional PF Keys**PF Key 6 - Sctn**

This key will point to the Section Maintenance screen.

PF Key 10 - Rnbr

This key will renumber the lines.

PF Key 12 - Instr

This key will point to the Template Line Instruction Maintenance screen.

Processing Notes

The user will set up the lines on the form for each year and the corresponding COLA percentage for that year.

The worker processing the budget will see a screen showing the year, the benefit for that year, the COLA for that year and the COLA amount for that year. The benefit will be entered by the worker and the system will calculate the amount. The year and the COLA % will be set up according to what is entered in this section of the template. The COLA amounts calculated for each line will be used to derive the benefit amount for the year SSI was lost.

Section lines may only be added when the status of the Section is 'incomplete'.

Technical Note: The lines in the COLA section are added with a status of 'complete' as the user does not have to go to the Template Line Maintenance function to complete them.

Post Eligibility Completion Section (PC)

The Post Eligibility Completion Section is NOT a user-defined section. It is a section that is created by the system when a Post Eligibility Section is created by the user. It is merely a device to help the system know when the worker has completed a budget that contains Post Eligibility sections. This section does not appear on the paper budget forms.

The Post Eligibility Completion section is required when there are Post Eligibility sections in the template. The Post Eligibility Completion section is used to indicate to the system when the entire budget is complete i.e. when the worker completes the Post Eligibility Completion section the system will check to see that all the PE sections have been done.

The Post Eligibility Completion section will contain only one line that asks the user to confirm that the Post Eligibility (PE) sections have been completed.

Budget Template Line Maintenance

```

Message Line ...
LINE                                     *** M.E.D.SYSTEM ***                *DATE
MEBTLNF                                BUDGET TEMPLATE LINE MAINTENANCE        *TIME

*Action                               : _ (C,D,M,N,L)
*TEMPLATE ID                           : _____ Desc
*TEMPLATE VERSION                       : _____ Version Status : Desc
*SECTION ID                             : _____ Desc
*LINE NUMBER                            : _____ Section Type   : __ Desc
Line Description                        : _____
*Line Type                              : _ Desc                    Negative Allowed   : _ (Y/N)
*Question Answer                        : __ Desc                   Override Allowed   : _ (Y/N)
Fixed Value                             : _____                Monthly Multiplier : _ (Y/N)
*Look up Table                          : _____                 *Dependent on Line : _____
*Data Type                              : _                          Dependent on EIE   : _ (Y/N)
*Data Belonging to                      : _ *Non Bud Member Type : __ Desc _____
*Expenses                               : _ *Expense Types       : __ Desc           +
*Unearned Income                        : _ *Unearned Inc Types  : __ Desc           +
Calculation Formula : 1. __ _____ 2. __ _____
                    3. __ _____ 4. __ _____ +

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit Sln Instr
    
```

Each line in each section will be defined using the line rules. These rules will determine how the lines are presented in the budget capture process. These lines will dictate which amounts must be captured by the worker during budget capture and which amounts will be set up by the system or calculated by the system.

Fields

Action (A1)

The action codes for this field are (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

TEMPLATE ID (A6)

Mandatory field. A code identifying the template can be entered. The template name will be displayed once the id is known. A code identifying the template can also be passed from the template section line screen. The template name will be displayed.

TEMPLATE VERSION (A4)

Mandatory field. The version number can be entered in MMY format or the version number can also be passed from the template section line screen.

Version Status (A10)

Output only. A description of the status of the version will be displayed.

SECTION ID (A12)

Mandatory field. The code identifying the section can be entered. The name of the section will be displayed. The section code identifying the section can also be passed from the template section line screen.

LINE NUMBER (N4)

Mandatory field. The code identifying the line number can be entered. The number of the line can also be passed from the template section line screen.

Section Type (A2)

Output only. The section type code will be displayed with its description.

Line Description (A30)

The line description will be defaulted to the description entered in the section line maintenance screen. This will be a mandatory field.

Line Type (A2)

Mandatory field. Valid line types are:

- U user input
- C calculated value
- T value from the Standard Type table
- F fixed value
- S sum of countable income from member calculation sections (only valid in an Eligibility section)
- B sum of medical bills from the Spenddown section (only valid in an Eligibility section)
- E sum of COLA from the COLA section (only valid in an Eligibility and Member Calculation sections)
- Z sum of unearned income (only valid in a Member Calculation section)
- I sum of earned income (only valid in a Member Calculation section)
- D data from Case Monthly Income, Person Monthly Income or Person Monthly expense. (can be earned income, unearned income or expenses). Valid in all sections.
- Q answer from one of the Case Budget Info questions. Valid in all sections.
- G Sum of countable earned income from member calculation sections (only valid in an Eligibility or Post Eligibility section) Note: This line type is similar to line type S which is the sum of all countable income instead of split between countable earned income and countable unearned income which these new lines types G and H will do.
- H Sum of countable unearned income from member calculation sections (only valid in an Eligibility or Post Eligibility section) Note: This line type is similar to line type S which is the sum of all countable income instead of split between countable earned income and countable unearned income which these new lines types G and H will do.
- A dependent care allowance (only valid in a Member Calculation section).

Income Type (A2)

This was a user input field in previous releases of Templates for Line type D, but is no longer used and does not appear on the screen. If it is populated historically, a display at the bottom of the screen will contain: 'Income Type NN – DESCRIPTION' where NN is the income type followed by the description for that income type from income type table.

Multiple Income Types Allowed (A1)

This was a user input field in previous releases of Templates for Line type D, but is no longer used and does not appear on the screen. If it is populated historically, a display at the bottom of the screen will contain: 'Multiple Income Types Allowed on this line'.

Negative Allowed Indicator (A1)

An indicator to say if a negative number is allowed on the line. This field is only used when line type is 'C'. Valid values are (Y)es, (N)o and blank. Default is (N)o.

Fixed Value (N9.2)

This amount will be entered if the line type is 'F'. Otherwise it will be zero.

Medical Expenses Allowed (A1)

This was a user input field in previous releases of Templates for Line type D, but is no longer used and does not appear on the screen. If it is populated historically, a display at the bottom of the screen will contain: 'Medical Expenses Allowed on this line'.

Override Allowed Indicator (A1)

An indicator to say whether the user is allowed to override the system calculated value or not. Valid values are: (Y)es or (N)o. Default value is (N)o.

Look up Table (A8)

The Standard Type table code will be entered if the line type is 'T' or 'A'. Otherwise it must be blank.

Monthly Multiplier (A1)

An indicator to say whether the line is to be multiplied by a monthly factor. Valid values are (Y)es, (N)o and blank. Default is (N)o.

Dependent on Line Num (N4)

The line number that this line is dependent on. The line number entered must be less than the current line number in the same section.

Technical Note: The actual field that is stored is the line-key. The value of the 'depend on line' must be greater than zero for the current line to be used e.g. if value of line 10 (number of months) > zero then give the Earned Income Exemption that is defined on this line (line 11).

Question Answer (N2)

Number of the question who's answer is used for this line. Mandatory if Line Type is Q, otherwise must be blank. Must be valid number from LDA METBIQL. Help is available on this field using the LDA. Questions 15 and 16 cannot be specified here as their answers are not Y, N or numeric and no routine exists for the translation.

Data Type (A1)

Type of income or expense data to be used for this line. Valid Values: E(Earned Income), U(earned Income), A(All Income), X(xpenses). Mandatory if Line Type is D otherwise must be blank.

Dependent on EIE (A1)

Set to Y if this line is dependent on the EIE Indicator on Budget Worksheet. If Include EIE Indicator on the budget worksheet is equal to Y use the value of this line. Otherwise line value is zero. Default to N.

Technical Note: This is similar to Dependent on Line field, which already exists.

Data Belonging to (A1)

Indicates whose data must be used for this line. Valid Values: M(ember for this section), A(all AU members for this budget), I(all IU members for this budget), N(on Budget members contributing income to the case). Mandatory if Line Type is D otherwise must be blank. Default to M if section type is CM. M is only valid for section type CM.

Non Bud Member Type (A2)

Indicates what type of Non Budget member income contributor data must be used for this line. Valid Values: 2P (Second Parent), CS (community spouse), SS (sponsor's spouse), IC (all ineligible children), AD (all dependents). Mandatory if Data belonging to is equal to N otherwise must be blank.

Expenses (A1)

Indicates which expense types must be used to obtain the value for this line. Mandatory if Data Type is X, otherwise must be blank. Valid Values: I(All Incurred Medical Expenses), R(All Regular Expenses), S(pecific Expense Types), J(All Incurred Medical Expenses except specific types), K(All Regular Expenses except specific types).

Expense Types (10 * A2)

Up to 10 expense types can be specified for inclusion or exclusion on this line. This is a 'moreable' field. At least 1 expense type must be specified if Data Type is equal to X and Expenses is equal to S, J or K. Otherwise must be blank. Help is available on this field.

Unearned Income (A1)

Indicates which unearned income types must be used to obtain the value for this line. Mandatory if Data Type is U or A otherwise must be blank. Valid Values: A(II), S(pecific), J(All except specific types).

Unern Inc Types (10 * A2)

Up to 10 unearned income types can be specified for inclusion or exclusion on this line. This is a 'moreable' field. At least 1 unearned income type must be specified if:

- 1) Data Type is equal to U and Unearned Income is equal to S or J;
- 2) Data Type is equal to A and Unearned Income is equal to S or J.

Calculation Formula

A formula will be entered if line type is 'C' or 'T'. Otherwise it must be empty. This is a 'moreable' field. It will consist of operators (N2) and operands (A12) and (N4) - which are Section ids and line numbers. The Section Id used must have the multiple allowed indicator set to (N)o to be valid for use here. The Section Id must be valid within the Template Version.

Technical Note: the operand line numbers are stored as the internal template line key (i.e., they must be decoded for display and before an add or change is made to an operand)

Technical Note: The calculation occurs on an operand by operand basis within the Template. Bear in mind that if the 'Negative Allowed' is set to a 'N', and mid calculation your value becomes a negative amount, the calculation will automatically change the value to a 0 and continue with the calculation. This may skew the final amount drastically.

Additional PF Keys**PF Key 6 - Sln**

This key will point to the Section Line Maintenance screen.

PF Key 12 - Instr

This key will point to the Template Line Instruction Maintenance screen.

Processing Notes

Operators (A2)

Single Occurrence Operators - These operators will be the only operators that appear in the list of operators and will occur any number of times.

- GR Greater of any number
The resulting value is the greatest of the values in the lines entered as operands.
E.g.
GR 2000
GR 2500
GR 3000
- LS Lesser of any number
The resulting value is the lesser of the values.
E.g.
LS 5000
LS 5500
LS 6000
- TA Table lookup
There will only be 1 occurrence for this type. Will only be able to specify this type if line type is 'T'. The resulting value will be the value that appears in the table named as the Look up Table with the look up value of the line specified as the corresponding operand.
E.g.
TA 2500
Where look up table is AFDC GRANT
The line 2500 will contain a value (number of persons in the household). The system will use this value as the index to the table 'AFDCGRANT' to find the standard value for that number of persons.
- NI Number of IU persons
Only 1 occurrence will be allowed. There will be no operands for this operator. The resulting value will be the count of the number of persons that appear in the budget as income unit members. This value will be calculated when the budget is processed.
- NA Number of AU persons
Only 1 occurrence will be allowed. There will be no operands for this operator. The resulting value will be the count of the number of persons that appear in the budget as assistance unit members. This value will be calculated when the budget is processed.
- NM Number of EIE months (\$30)
Only 1 occurrence allowed. There will be no operands for this operator. The resulting value will be the remaining number of months that the \$30 exemption can still be used.

This operator can only be used when all Type Cases linked to this template allow the Earned Income Exemption (or have no Type Cases linked).
- NT Number of EIE months (1/3)
Only 1 occurrence allowed. There will be no operands for this operator. The resulting value will be the remaining number of months that the third (1/3) exemption can still be used.

- This operator can only be used when all Type Cases linked to this template allow the Earned Income Exemption (or have no Type Cases linked).
- PR** Prorata
2 and only 2 occurrences will be entered. The system will take the value of the first operand (number of days remaining in the month) and prorates the value of the second operand (full monthly value) for the month.
E.g.
PR 3500 (value 10)
PR 4000 (value 150)
The system will take the value of line 4000 (150) and divide by the number of days in the budget month. ~~multiply it by 12/365.~~ This value will be multiplied by the value of line 3500 (10) to give the resulting value. If the value of the line in the first operand is zero, the answer will be the value of the second operand. (Zero will indicate a full month). If the resulting value is greater than the value of the second operand, the answer will be the value of the second operand.
- AB** Absolute Value
Only 1 occurrence allowed. The system will take the absolute value of the line.
E.g.
AB 1200 (value -145)
The system will take the absolute value of line 1200.
- MO** Number of months
Will display the value of the Number of Months field from the Budget Worksheet file. This is useful for, say, multiplying a monthly income by the number of months in the budget to get a total income amount.
- CU** Number of AU persons under age 6.
Only 1 occurrence will be allowed. There will be no operands for this operator. The resulting value will be the count of the number of persons that appear in the budget as assistance unit members and are under 6 on the first day of the budget month. This value will be calculated when the budget is processed.
- CL** Is member the client
Only 1 occurrence will be allowed. There will be no operands for this operator and it can only be used on a CM section. If the member is the probable client on the applications, the value of the line will be 1, otherwise it will be 0.
- SE** Student Earnings
Only 1 occurrence will be allowed. There will be no operands for this operator and it can only be used on a CM section. If the member is a student and student earned income must be excluded on the budget, the value of the line will be 0, otherwise it will be 1.
- II** IU members with Income
Only 1 occurrence will be allowed. There will be no operands for this operator. The resulting value will be the count of the number of persons that appear in the budget as income unit members with Income. This value will be calculated when the budget is processed
- FM** First Month (Only used on LTC template)
Only 1 occurrence will be allowed. There will be no operands for the operator. The resulting value will be:
- 0 if it is the month of entry into the institution, i.e. the budget month/year equals the date of entry (Q10) - month/year. SSI amount should be included when calculating PLI.

- 1 if it is NOT the month of entry into the institution, i.e. the budget month/year is NOT equal to the date of entry (Q10) - month/year. SSI amount should be excluded when calculating PLI.

Operators that can be mixed

AD	Add Will result in the value of the operand line being added to the amount of the current line. The operand line can only refer to a section that does NOT occur multiple times (MULTIPLE-ALLOWED-INDIC = 'N').
SU	Subtract Will result in the value of the operand line being subtracted from the amount of the current line.
MU	Multiply Will result in the value of the operand line being multiplied to the amount of the current line. MU operators can appear many times in the calculation string but only after AD, DV, or SU.
DV	Divide Will result in the value of the operand line being divided into the amount of the current line.
AF	Add fixed Will result in the fixed value being added to the amount of the current line.
SF	Subtract fixed Will result in the fixed value being subtracted from the amount of the current line.
MF	Multiply fixed Will result in the fixed value being multiplied to the amount of the current line.
DF	Divide fixed Will result in the fixed value being divided into the amount of the current line.
AM	Add Multiple Will result in the value of the operand line being added to the amount of the current line. He operand line can refer to a section that occurs multiple times (MULTIPLE-ALLOWED-INDIC = 'Y'). It can also be used if the section does NOT occur multiple times in which case it will return the same result as the AD operator.

Operands

Operands will be mandatory for each occurrence in which an operator is completed, unless the operator is NA, NI, NM, NT, CU, CL, SE, II, FM or MO.

The operand must be a valid line number and that line number must be less than the current line number when the operand's section id is equal to the current line's section id.

As each line is processed, it will be validated and if it passes validation the status of the line will be marked as complete. The next line can then be processed. Any lines remaining in an incomplete process will halt the final validation of the section and ultimately the budget.

Budget Template Section Line Renumbering

Message Line ...		*** M.E.D.SYSTEM ***	*DATE
MEBRENN	BUDGET TEMPLATE LINE RENUMBERING		*TIME
Start Line Number	:	_____	
Numbering Gap	:	_____	
Enter-PF1---	PF2---	PF3---	PF4---
	PF5---	PF6---	PF7---
	PF8---	PF9---	PF10---
	PF11---	PF12	
Help	Cont	Canc	

This pop-up window function is available to renumber the lines in a section of a template. Lines may have gone out of order due to the insertion or deletion of lines during the capture of a new version of a template. This function could be invoked from several screens where the template lines are being captured.

The fields on the maintenance screen are described below:

Start Line Number (N4)

The user will enter the 4 digit line number. The start line number will become the line number of the first line in the section that is being renumbered. This number will be defaulted to 100.

Numbering Gap (N4)

This will be the gap between the line numbers. This number will be defaulted to 100.

Processing Notes

The system will only renumber a section if the template version is in a pending state.

Budget Template Line Instructions Maintenance

```

Message Line
  INSTR          *** M.E.D. SYSTEM ***          *DATE
  MEBTINF        BUDGET TEMPLATE LINE INSTRUCTIONS MAINTENANCE *TIME
                                                    *LIBRARY-ID

*Action          : _ (C,D,M,N,L)
*TEMPLATE ID     : _____
*TEMPLATE VERSION : _____ Version Status:
*SECTION ID      : _____
*LINE NUMBER     : _____ Section Type:
  Line Description : _____

  Instructions    : _____
                  _____
                  _____
                  _____

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit      Sln

```

Templates cannot be changed if the version is in Current status. This function can be used to maintain Template Line Instructions regardless of the status of the template version.

The fields on the maintenance screen are described below:

Action (A1)

The action codes for this field are (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

TEMPLATE ID (A6)

Mandatory field. A code identifying the template can be entered. A code identifying the template can also be passed from the template section line screen. The template name will be displayed once the id is known.

TEMPLATE VERSION (A4)

Mandatory field. The version number can be entered in MMY format or the version number can also be passed from the template section line screen.

Version Status (A10)

Output only. A description of the status of the version will be displayed.

SECTION ID (A12)

Mandatory field. The code identifying the section can be entered. The section code identifying the section can also be passed from the template section line screen. The name of the section will be displayed.

LINE NUMBER (N4)

Mandatory field. The code identifying the line number can be entered. The number of the line can also be passed from the template section line screen.

Section Type (A2)

Output only. The section type code will be displayed with its description.

Line Description (A30)

The line description will be defaulted to the description entered in the section line maintenance screen.

Line Instructions (5 * A45)

Any instructions for the line will be entered. The worker capturing the budget will see these instructions if required. This is an optional field.

Additional PF Keys**PF Key 6 - Sln**

This key will point to the Section Line Maintenance screen.

Copy Template Sections

```

Message Line ...
COPY                      *** M.E.D.SYSTEM ***                *DATE
MEBTCPF                   BUDGET TEMPLATE SECTION COPY        *TIME

Copy To :
*TEMPLATE ID      : _____ Desc
*TEMPLATE VERSION : _____ Version Status : Desc
SECTION ID       : _____

Copy From :
*TEMPLATE ID      : _____ Desc
*TEMPLATE VERSION : _____ Version Status : Desc
*SECTION ID      : _____ (leave blank to select all)
Section Name     : _____
Section Selection : _ (Y/N)

Confirm Copy      : _ (Y/N)

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit                               Vrsn Sctn Sln
  
```

A version of a template can be copied to another for ease of capturing the latter. A particular section or multiple sections within a version can be copied to another.

Note: A section can not be copied when one its section lines contains a calculation step that references another section's line number and that section doesn't exist in the 'Copy To' Template.

The fields on the maintenance screen are described below:

Copy to Template Id (A6)

A code identifying the template will be entered. The template name will be displayed.

Copy to Template Version (A4)

The version number will be entered.

Copy to Section Id (A12)

The section code identifying the new section that will be created. This field is only available for a single section copy when the 'Copy from Section Id' field has been populated. If more than one section is to be copied, then this option is not available.

Copy from Template Id (A6)

A code identifying the template will be entered. The template name will be displayed.

Copy from Template Version (A4)

The version number will be entered.

Copy from Section Id (A12)

The section code identifying the section to be copied will be entered. The name of the section will be displayed. If one section must be copied then the code of the section will be entered. If more than one section must be copied, the user will select the sections from a list (See Section Selection).

Copy from Section Selection (A1)

More than one section can be copied. The user will enter a 'Y' in this field to see a list of the available sections that can be copied. When this field is a 'Y', the Copy From Section Id must be blank.

Copy to Version Status (A10)

A description of the status of the version will be displayed.

Copy from Version Status (A10)

A description of the status of the version will be displayed.

Confirm Copy (A1)

The copy must be confirmed by the user. Defaulted to 'N'. This field must be entered.

Additional PF Keys**PF Key 9 - Vrsn**

This key will point to the Template Version Maintenance screen.

PF Key 10 - Sctn

This key will point to the Section maintenance screen.

PF Key 11 - Sln

This key will point to the Section Line Maintenance screen.

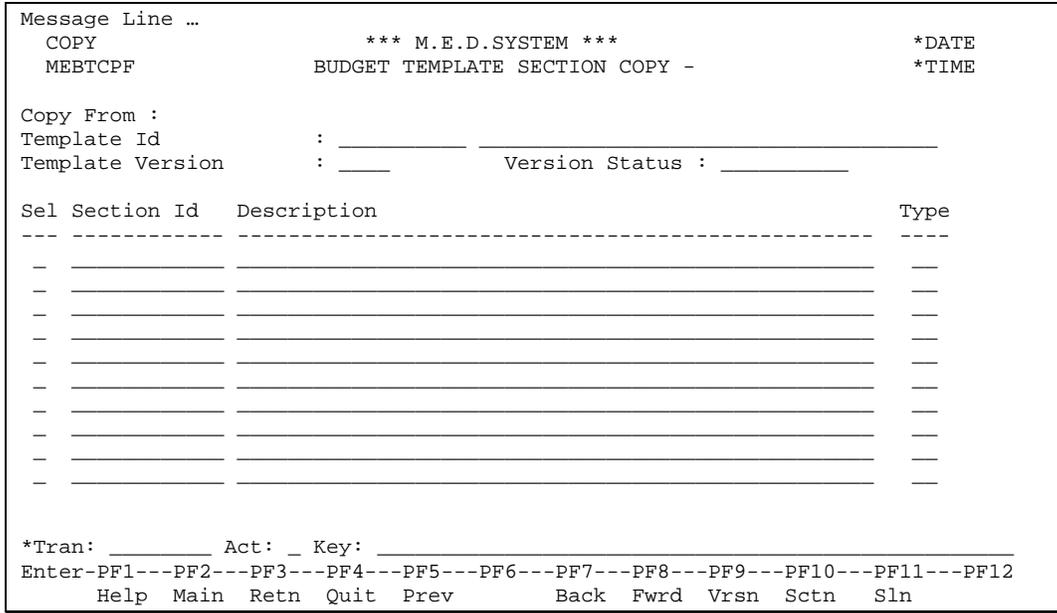
Processing Notes

The 'to' template version must be in status 'P' (pending).

The copy must not result in more than one of the following section types: pretest, eligibility, Spenddown and COLA, existing in the 'to' template version.

The copy will result in the creation of the section and all its lines attached to the target template version. If all the template sections are copied, all the Category/Type cases linked to the source template version will also be copied and linked to the target template version.

The list of sections will be displayed in the following screen:



The fields on the list screen are described below:

Copy from Template id (A6)

Output only field. A code identifying the template will be displayed. The code will be passed through from the Copy maintenance screen. The template name will be displayed.

Copy from Template Version (A4)

Output only field. The version number will be displayed. The version will be passed from the Copy maintenance screen.

Copy from Version Status (A10)

A description of the status of the version will be displayed.

Sel (A1)

The user will identify which sections must be copied by entering an >S= or 'X' in the fields corresponding to the required sections.

Section Code (A12)

Output only field. The code identifying the section will be displayed. As many sections as there are in the template being used as the copy will be displayed.

Section Description (A50)

Output only field. The section description will be displayed.

Section Type (A2)

Output only field. The section type will be displayed.

Additional PF Keys

PF Key 5 - Prev

This key will point back to the first Budget Template Section Copy screen.

PF Key 9 - Vrsn

This key will point to the Template Version Maintenance screen.

PF Key 10 - Sctn

This key will point to the Section maintenance screen.

PF Key 11 - Sln

This key will point to the Section Line Maintenance screen.

Budget Line Identifier Maintenance (BLVT)

Add a new screen to maintain all the valid Budget Line Identifiers.

```

      BLVT                *** M.E.D. SYSTEM ***                02/25/04
      METBLVF             BUDGET LINE IDENTIFIER MAINTENANCE    07:41:15
                                                                METEST

*Action                 : _ (A,B,C,D,M,N,P,L)
*USED FOR               : _ Desc
*LINE IDENTIFIER       : _
  Short Description     : _____
  Description           : _____
                       _____
                       _____
                       _____

*Section types         : _ _ _ _ _
  Required              : _ (Y)

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit

```

The Budget Line Identifier Maintenance is used to mark budget lines for reporting/calculation purposes.

Field Descriptions

Action (A1)

The action codes for this field are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (P)urge, (L)ast.

USED FOR (A1)

Required. The code that specifies what the line identifier is going to be used for. Valid values are (from METBUFL):

- C Calculation
- R Reporting

LINE IDENTIFIER (A1)

Required. The code that identifies the type of reporting / calculation the budget line is used for.

Short Description (A15)

Required. Short description of the Line Identifier. The short description is displayed on the Budget Template Section Maintenance Screen (see Screen 1: Member Calculation (CM), Post Eligibility (PE), Eligibility (EL), Pretest (PR) – page 16).

Description (A250)

Required. Long description of how and where the Line Identifier is used.

Section Types (A2/5)

At least one Section Type must be specified. Valid section types where the Line Identifier can be used. PF1 Help will be available for this field. Valid values are (from METSTPL):

PR Pretest
EL Eligibility
CM Member Calculation
SD Spend down
CO Benefit Amount deducting COLA %.
PE Post Eligibility
PC Post Eligibility Complete

Required (A1)

Indicates whether the Line Identifier is required on the specified Section Types. Valid value are 'Y'es or blank. Currently only two Line Identifiers are required on a specific section, i.e. F (Final eligibility amount) is required on the Eligibility section and T (Pretest eligibility amount) is required on the Pretest section.

Purge Processing

A Budget Line Identifier can not be deleted if it is used on any Template Line on any Template.

Technical Note: Use new super descriptors on ME-TMPLT-LINE RTYPE-ID-VER and TYPE-ID-VER to check if Budget Line Identifier is used on any template.

Reporting Line Identifiers

The following new Reporting Line Identifiers have been identified and will be added using the new BLVT screen (see **Error! Reference source not found.** – Page **Error! Bookmark not defined.**):

Used for	Line Identifier	Short Description	Valid Section Type	Definition
R	T	Total Countble Inc	EL	Total Countable Income This is used in the Eligibility section to identify the total countable income for all the people in the household. This is used in the HIFA Waiver Report.
R	H	Household size	EL	Number of Persons in the Household This is used in the Eligibility section to identify the number of person in the household. On some templates this is the number of IU/AU members with the number of unborn(s) included or not. On other template this is the number of persons (1=Client, 2= Couple). This is used in the HIFA Waiver Report.
R	D	Parnts Tot Cnt Inc	CM	Both Parents' Combined Countable Income This is used in a deeming Member Calculation section to identify the income that may be deemed. (Deemed income is calculated as the combined parents' countable income minus the Living Allowance, FPIG or Needs Standard for the number of persons/parents). This is used in the HIFA Waiver Report.
R	N	Persons/Parents	CM	Persons in Home but not in Assistance Unit/Number of Parents This is used in a deeming Member Calculation section to identify the number of persons in the home but not in the Assistance unit /number of parents. This is used in the HIFA Waiver Report.
R	S	Spend down Amt	EL	Spend down Amount This is used in the Eligibility section to identify the allowable medical expenses. This is used by Auto Notices.
R	Q	# Elig Days	PE	
R	U	Gross Earn Inc	CM	
R	V	Gross UErn Rnt	CM	

R	W	Gross Urn Rntal	CM	
---	---	-----------------	----	--

Calculation Line Identifiers

The following existing Calculation Line Identifiers will be added using the new BLVT screen (see **Error! Reference source not found.** – Page **Error! Bookmark not defined.**):

Used for	Line Identifier	Short Description	Valid Section Type	Definition
C	C	Counted Income	CM	Used in conjunction with Line Type S in the Eligibility section to get the sum of the countable income from the Member Calculation sections.
C	U	Unearned Income	CM	Used in conjunction with Line Type Z in a non deeming Member Calculation section to get the sum of unearned income from the deeming Member Calculation sections.
C	N	Earned Income	CM	Used in conjunction with Line Type I in a non deeming Member Calculation section to get the sum of earned income from the deeming Member Calculation sections.
C	E	Excess Spend down	EL	Indicates the Excess Spend down amount in the Eligibility Section.
C	F	Final Elig Amt	EL	Indicates the Final Eligibility amount in the Eligibility section that is used to determine whether the outcome of the budget is eligible or not.
C	O	OSS Amt	PE	Indicates the OSS amount in the Post Eligibility section that will be saved on the Segment when the budget is linked to the Segment.
C	P	Full PLI Amt	PE	Indicates the Full PLI amount in the Post Eligibility section that will be saved on the Segment when the budget is linked to the Segment.
C	Q	Partial PLI Amt	PE	Indicates the Partial PLI amount in the Post Eligibility section that will be saved on the Segment when the budget is linked to the Segment.
C	I	Counted UnE Inc	CM	Used in conjunction with Line Type H in the Eligibility or in a Post Eligibility section to get the sum of the Counted Unearned income from the Member Calculation sections.
C	R	Counted Ern Inc	CM	Used in conjunction with Line Type G in Eligibility or Post Eligibility section to get the sum of the Counted Earned income from the Member Calculation sections.
C	T	Prest Elig Amt	PR	Indicates the Pretest Eligibility amount in the Pretest section that is used to determine pretest eligibility.
C	M	MPP Premium	PE	Indicates the MPP Premium in the Post Eligibility section that will be saved on the Cert when the budget is linked to the Cert.

Add the following two new Calculation Line Identifiers:

Used for	Line Identifier	Short Description	Valid Section Type	Definition
C	A	Final Countble Inc	EL	Final Countable Income This is used in the Eligibility section and is the line that will be compared against the Eligibility Standard to determine whether the budget outcome is eligible. Used for the Champ/Lachip & QMB/SLMB/QI1 edits when a budget is calculated.
C	B	Number of persns	EL	Number of Persons in the Household This is used in the Eligibility section and is the line that is used to get the appropriate Eligibility Standard for the number of persons in the household. Used for the Champ/Lachip & QMB/SLMB/QI1 edits when a budget is calculated.
C	V	FOA Premium	PE	FOA Premium
C	D	Par Tot Cnt Inc	CM	Both Parent's Combined Countable Income. Used in a deeming Member Calculation section to identify the income that may be deemed.(Deemed income is calculated as the combined parent's countable income minus Living Allowance, FPIG or Needs Std.
C	H	Household Size	EL	Number of Persons in the Household. This is used in the Eligibility section to identify the number of persons in the household. On some templates this is the number of IU/AU members with the number of unborn(s) included or not.
C	N	Persons/Parents	CM	Persons in Home but not in Assistance Unit/Number of Parents Used in deeming Member Calculation section to identify the number of persons in the home but not in the Assistance unit/number of parents.
C	Q	# Elig Days	PE	Indicates the number of days if partial month in Post Eligibility section that will be shown on the budget determination outcome pop-up window.
C	S	Spend down Amt	EL	Spend down Amount. This is used in the Eligibility section to identify the allowable medical expenses. Used by Auto Notices.
C	T	Total Count Inc	EL	Total Countable Income. This is used in the Eligibility section to identify the total countable income for all the people in the household.
C	U	Gross Earn Inc	CM	Used in conjunction with Line Type "D" in a Member Calculation section to get the Gross Earned Income

				prior to allowable deductions for reporting purposes.
C	V	Gross UErn Rnt	CM	Used in conjunction with Line Type "D" in a Member Calculation section to get the Gross Unearned Income, EXCLUDING RENTAL INCOME, prior to allowable deductions for reporting purposes.
C	W	Gross Urn Rntal	CM	Used in conjunction with Line Type "D" in a Member Calculation section to get the Gross Unearned Rental Income prior to allowable deductions for reporting purposes.

Budget Template Testing Facilities

```
Message Line ...
BTTSM          *** M.E.D.SYSTEM ***          *DATE
MECBTTM        BUDGET TEMPLATES TESTING FACILITIES *TIME

                ID      CODE      DESCRIPTION
                --      ----      -
                1      TT      TEMPLATE TEST
                2      BT      BUDGET TEST

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit
```

Template Test

```

Message Line ...
  TT                      *** M.E.D.SYSTEM ***                      *DATE
  MEBTTSF                  TEMPLATE TEST                            *TIME

*Action                    : _ (B,C,D,N,L)
*TEMPLATE ID               : _____ Desc
*TEMPLATE VERSION          : _____ Version Status : Desc
*SECTION ID                : _____ Desc
Section Type               : _ Desc
Number of AU Members       : _____
Number of IU Members       : _____

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit          Test

```

The template test function is used to test each section of a template in isolation to see that the line calculations work correctly. All lines that reference lines in other sections will be regarded as user input lines for test purposes. Line calculations, table lookups and fixed values can be tested in this function.

The template test functionality will be used to test the template's user input capability and system calculation and access capabilities. The user will enter fictitious amounts, in lines defined as user input, which will prove that the formulae, defined in the template, are correct. The user will also be able to prove that fixed values are being displayed correctly and that any accesses to tables are being processed accurately. The template test will not include cross section processing (summing values across sections).

The template test will include minimal validation of the individual fields. If these values are entered, then calculations will be done. However, a valid template version in 'Test' status must be used.

The fields on the test screen are described below:

Action (A1)

The action codes for this field are (B)rowse, (C)lear, (D)isplay, (N)ext, (L)ast.

TEMPLATE ID (A6)

A code identifying the template will be entered. The template name will be displayed.

TEMPLATE VERSION (A4)

The version number will be entered.

SECTION ID (A12)

The section code identifying the section will be entered. The name of the section will be displayed.

Section Type (A2)

Output only. The section type code will be displayed with its description.

Number of AU Members (N2)

The number of AU members to be used when testing the section. This field is mandatory.

Number of IU Members (N2)

The number of IU members to be used when testing the section. This field is mandatory.

Additional PF Keys**PF Key 6 - Test**

This key will commence the test.

Processing Notes

The template version selected must be in a Test status.

The user will test each section individually. No amounts will be carried forward from section to section. Where a line specifies that the amount is a sum of amounts from previous sections, the system will allow the user to enter this amount.

The next screen to be displayed is determined by the section type of the section id entered by the user.

Screen 1: Pretest / Member Calculation / Eligibility Section / Post Eligibility

```

Message Line ...
TT                      *** M.E.D.SYSTEM ***                      *DATE
MEBTTSF                 TEMPLATE TEST                             *TIME

TEMPLATE ID             : _____ Desc
TEMPLATE VERSION        : _____ Version Status : Desc
SECTION ID              : _____ Desc
Section Type            : __ Desc

Line Description                Amount                User Wants to
-----                -----                Override Ind
-----                -----                -----
Desc _____                _____                -
Desc _____                _____                -
Desc _____                _____                -
_____                _____                -
_____                _____                -
_____                _____                -
_____                _____                -
_____                _____                -
_____                _____                -
_____                _____                -
_____                _____                -

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit Prev          Back FwrD
    
```

The pretest, member calculation and eligibility sections will be displayed in a similar way to how it will be displayed during the budget capture process. The amounts will be entered by the user if required so as to test the various line rules.

The fields on the test screen are described below:

TEMPLATE ID (A6)

A code identifying the template will be passed from Screen 1. The template name will be displayed.

TEMPLATE VERSION (A4)

The version number will be passed from Screen 1.

SECTION ID (A12)

The section code identifying the section will be passed from Screen 1. The name of the section will be displayed.

Section Type (A2)

Output only. The section type code will be displayed with its description.

Line Description (A30)

The description of the template line will be displayed.

Amount (N9.2)

The user will enter an amount or the system will access or calculate an amount according to the line's rules specified in the template.

User Wants to Override Ind (A1)

The user will enter a non-blank in this field to indicate to the system that it should not calculate the value of this line, rather use the line value the user has entered. This option is only available on lines which have been identified as being able to be overridden (for more detail, refer to the Budget Template Line Maintenance documentation).

Additional PF Keys

PF Key 5 - Prev

This key will point back to the first Template Test screen.

Processing Notes

The lines will be set up according to the lines in the template. The lines will be displayed in line number sequence. The description will not be changeable. The amount will be protected if the system is to access or calculate it.

Any amounts that might be required in a later section will not be carried forward. For example, if testing the eligibility section which requires a sum of all previous sections' countable income, the amount which would show the sum will be blank. The user will be allowed to enter this amount in the following sections so that the calculation can be tested.

Technical Note: For testing purposes Line Types S, B and E must be user entered. For testing purposes Operators NI and NA will use the values for Number of AU/IU members entered by the user on the main Template Test screen. Lines with Operators NM, CU, CL, SE, II and NT will be user entered.

Screen 2: Spenddown Section

```

Message Line ...
TT                *** M.E.D.SYSTEM ***                *DATE
MEBTTSF          TEMPLATE TEST                          *TIME

TEMPLATE ID      : _____ Desc
TEMPLATE VERSION : _____ Version Status : Desc
SECTION ID      : _____ Desc
Section Type    : __ Desc                               Excess Amount: _____

Date            Line Description                        Amount          Balance
-----
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____
__ /__ /__     _____

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
Help Main Retn Quit Prev
    
```

The section will be displayed in a similar way to how it will be displayed during the budget capture process. The amounts will be entered by the user if required so as to test the calculation of the balance.

The fields on the test screen are described below:

TEMPLATE ID (A6)

A code identifying the template will be passed from Screen 1. The template name will be displayed.

TEMPLATE VERSION (A4)

The version number will be passed from Screen 1.

SECTION ID (A12)

The section code identifying the section will be passed from Screen 1. The name of the section will be displayed.

Section Type (A2)

Output only. The section type code will be displayed with its.

Excess Amount (N9.2)

The excess income amount is usually an amount brought forward from another section in a Spenddown budget. For test purposes, this amount will be entered by the user.

Date (N8)

The user will enter the date of the medical bill.

Line Description (A30)

The default description of the template line will be displayed. The user will be able to overwrite it.

Amount (N9.2)

The user will enter an amount.

Balance (N9.2)

The balance will be calculated by the system as the excess amount reduced by each bill.

Additional PF Keys

PF Key 5 - Prev

This key will point back to the first Template Test screen.

Processing Notes

The lines will be set up according to the lines in the template. The lines will be displayed in line number sequence. The description will be changeable.

Any amounts that might be required in a later section will not be carried forward.

Screen 3: COLA Section

```

Message Line ...
  TT                      *** M.E.D.SYSTEM ***          *DATE
  MEBTTCF                 TEMPLATE TEST                 *TIME

TEMPLATE ID              : _____
TEMPLATE VERSION         : ____ Version Status : Desc
SECTION ID               : _____ Desc
Section Type             : __ Desc

Year      Benefit        COLA %      Amount
----      -
____      _____      _____
____      _____      _____
____      _____      _____
____      _____      _____
____      _____      _____
____      _____      _____
____      _____      _____
____      _____      _____
____      _____      _____

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help Main Retn Quit Prev
    
```

The section will be displayed in a similar way to how it will be displayed during the budget capture process. The amount will be entered by the user if required so as to test the calculations. Any newly captured COLA percentages will be displayed and used.

The fields on the test screen are described below:

TEMPLATE ID (A6)

A code identifying the template will be passed from Screen 1. The template name will be displayed.

TEMPLATE VERSION (A4)

The version number will be passed from Screen 1.

SECTION ID (A12)

The section code identifying the section will be passed from Screen 1. The name of the section will be displayed.

Section Type (A2)

Output only. The section type code will be displayed with its description.

Year (N4)

The year of the benefit will be set up from the template. The user will not be able to change this field.

Benefit (N9.2)

The benefit received by the member will be entered.

COLA % (N2.1)

The COLA % corresponding to the year will be set up by the system when setting up the line. The user will not be able to change the percentage on this screen.

COLA Amount (N9.2)

The amount resulting from applying the COLA % to the benefit.

Additional PF Keys

PF Key 5 - Prev

This key will point back to the first Template Test screen.

Processing Notes

The lines will be set up according to the lines in the template. The lines will be displayed in line number sequence.

Any amounts that might be required in a later section will not be carried forward.

Budget Test

```

Message Line ...
  BT                      *** M.E.D.SYSTEM ***          *DATE
  MEBBTSF                 BUDGET TEST                    *TIME

*Action                   : _      (A,B,C,D,M,N,P,L)
*CASE NUMBER              : _____ Client name
  DETERMINATION NUMBER   : _____
  BUDGET NUMBER          : _____
  Budget Status          : Desc           Deter Outcome: Desc

*Template Id              : _____
*Template Version         : _____
*Category Type Case      : ___ ___   Type Case description

  Budget Date            : ___ / ___
  Calculation Period     : _          Number of Months : _ (1/2/3)
  Include EIE            : _ (Y/N)

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit                                Next

```

The Budget Test function is used to test a whole template including the transfer of values between sections within the template. This is achieved by creating a 'test' budget using data from a real Case.

The functionality will be the same as Budget Maintenance. However, it will be accessed from the Template Menu for security purposes. The Budget Maintenance functionality will not allow a worker to select a template version that is still in 'test' status. The Budget Test functionality will not allow the user to select a template that is not in 'test' status. The Budget Test Function is the only place where a 'test' budget can be created or accessed. The 'test' budget number will be carried forward from this function through the regular maintenance screens provided the 'next' key is used.

'Test' budgets that have a status of 'complete' will be deleted in the daily housekeeping batch run.

Most of the screens will be the same as for a real budget. The front screen will contain less information.

The budget copy facility will not be available. The section copy facility will not be available.

The fields on the maintenance screen are described below:

Action (A1)

The action codes for this field are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast and (P)urge. Only 'test' budgets will be able to be modified, displayed or purged. The Next action will show only test budgets. The browse action will show only test budgets.

CASE NUMBER (N13)

The case number will be entered by the user. This is a mandatory field. The client name will be displayed in the standard format.

DETERMINATION NUMBER (N4)

The determination number is display only and defined to be 9999 for all Test Budgets.

BUDGET NUMBER (N3)

The budget number is mandatory and identifies the budget for an eligibility determination. It is generated by the system for an A)dd action using the next number method.

Budget Status (A15)

The status of the budget. This is a display only field. Valid values: "In Progress" and "Complete".

Determination Outcome (A15)

The outcome of the budget determination will be displayed. This may be blank if the budget has not been calculated. Valid values are:

1. 'ELIGIBLE'
2. 'INELIGIBLE'
3. Blank

Template Id (A6)

The template id will be entered by the worker. This will be the template that is going to be tested. This is a mandatory field.

Template Version (A4)

The version of the template will be entered by the worker. This is a mandatory field. The version must be in 'test' status.

Category Type Case (N3, N3)

The expected budget Category and Type Case. This is a mandatory field. The Type Case is required in order for the system to set specific budget worksheet options (e.g., Spenddown required, EIE allowed, etc.).

Budget Date (N6)

The date for which the test budget is to be processed. This is a mandatory field.

Calculation Period (A1)

The period that will be used to calculate the amounts on the budget. This is a display only field. Display the description next to the field.

Number of Month (N1)

The number of months in the calculation period. Mandatory field if calculation frequency is quarterly else the default will be 1 and user will not be able to change the value. For TM template, the default will be 3.

Include EIE Indicator (A1)

An indicator to tell the system whether or not to calculate the EIE fields in the budget. This field is only displayed when the template includes the EIE.

Processing

Test Budgets will be assigned to a Determination Number of all nines. This will ensure that all test budgets for a case are grouped together under one Determination number. This also ensures that test budgets do not get mixed in with real budgets for the Case.

Technical Note: Set Determination Number to 9999. Set Test Budget Indicator to (Y)es.

Additional PF Keys

PF Key 11 - Next

This key will point to the next screen in the test process - Budget Member maintenance. This key will be available throughout the test process.

Processing

The screens following the first will be the same as for a real budget.

Budget Template Batch Processes

Release Test Version (MED0060)

A daily routine will be processed in the batch run to release Test Versions into circulation. The routine will extract all template versions with a Release Date set to two months in the future or earlier (SIR263) or for any release date in the past. Any existing 'current' version will be updated so its Superseded date is equal to the Release Date of the new version and the 'current' version will be made Obsolete. The test template will be made Current with its Release date set to zero. It will have a blank Superseded date.

At the time that the Template Version is released (status changed to 'Current'), the system must check that no other 'Current' Template exists (from the release date forward) with any of the same linked Type Cases. A Type Case may only ever be linked to one template in 'Current' status.

Budget Template Reports

```
Message Line ...
BTRM                      *** M.E.D. SYSTEM ***          *DATE
MECBTRM                   BUDGET TEMPLATE REPORTS        *TIME

      Id Tran  Description
      -----  -
      1 BTWIR  Worker Instructions
      2 BTBFR  Blank Forms

Id/*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit
```

Worker Instructions (MEN0010)

Report Layout

1	2	3	4	5	6	7	8
12345678901234567890123456789012345678901234567890123456789012345678901234567890							

*PROGRAM	DEPARTMENT OF HEALTH AND HOSPITALS	MM/DD/YYYY
Job Name	BUDGET TEMPLATE INSTRUCTIONS	HH:MM AM
Job Number		Page: 0001
Template Name		
VERSION Version	Status Code - Status Description	
REPLACING Effective Date of the immediately prior version ISSUE		
PURPOSE		
Template Instructions		
PREPARATION		
Version Notes		
SECTION Section Id - Section Name	type code - type description	
Section Instructions		
Line Num-Line Description	line code - type description	
Line Instruction		
Line Num-Line Description	line code - type description	
Line Instruction		
Line Instruction		
Line Instruction		
SECTION Section Id - Section Name	type code - type description	
Section Instructions		
Line Num-Line Description	line code - type description	
Line Instruction		
Line Instruction		
Line Instruction		

```
Line Instruction
Line Num-Line Description
Line Instruction
Line Instruction
Line Instruction
```

```
*** End of Report ***
```

This report will instruct the worker how to complete the form for any program. The worker will select the category, type case and version. The report will access the instructions from the template, its sections and its lines.

Processing

Section Instructions will be printed for as many sections as there are in the template version will be printed.

Line Instructions will be printed for as many lines as there are in each line definition of the template version section.

There will be an online request for this report that will prompt the user to enter the category, type case and version.

Blank Forms (MEN0020)

The user can request a blank form for specific section(s) within a template or the user can request a blank form for the entire template.

There will not be a blank form for the Post Eligibility Completion Section as this section is only necessary for the system and is not needed in paper format.

Member Calculation Section / Post Eligibility Section

1 2 3 4 5 6 7 8
 1234567890123456789012345678901234567890123456789012345678901234567890

*PROGRAM	DEPARTMENT OF HEALTH AND HOSPITALS	Page: 0001
MM DD,YYYY	BUDGET WORKSHEET	Job Name
HH:MM AM		Job Number
TEMPLATE: Template ID Template Name		
VERSION : Version REPLACING: Superseded Date ISSUE		
CASE NUM: _____	SSN : _____	
DETER NUM : _____		
BUDGET NUM : _____		
CERT PERIOD: _____		
SECTION : Section Name	TYPE: Sect. type	
MEMBER : _____		
NOTES :	_____	

INSTRUCTIONS :	Instructions	
	Instructions	
Tmplt Line Num	Line Description _____	
	line instructions_____	
	line instructions_____	

Tmplt Line Num	Line Description _____	
	line instructions_____	
	line instructions_____	

PLI Amount: _____	(only on PE sects)	
OSS Check Amount: _____	(only on PE sects)	
*** End of Report ***		

Eligibility Section

1 2 3 4 5 6 7 8
 123456789012345678901234567890123456789012345678901234567890123456789012345678901234567890

*PROGRAM	DEPARTMENT OF HEALTH AND HOSPITALS	Page: 0001
MM DD,YYYY	BUDGET WORKSHEET	Job Name
HH:MM AM		Job Number
TEMPLATE: Template ID Template Name VERSION : Version REPLACING: Superseded Date ISSUE		
CASE :	_____	SSN : _____
DETER NUM :	_____	
BUDGET NUM :	_____	
CERT PERIOD :	_____	
SECTION : Section Name		
NOTES :	_____	

INSTRUCTIONS : Instructions		
	Instructions	
Tmplt Line Num	Line Description _____	
	line instructions_____	
	line instructions_____	

Tmplt Line Num	Line Description _____	
	line instructions_____	
	line instructions_____	

ELIGIBILITY : _____		
*** End of Report ***		

Pretest Section

1 2 3 4 5 6 7 8
 12345678901234567890123456789012345678901234567890123456789012345678901234567890

*PROGRAM	DEPARTMENT OF HEALTH AND HOSPITALS	Page: 0001
MM DD,YYYY	BUDGET WORKSHEET	Job Name
HH:MM AM		Job Number
TEMPLATE: Template ID Template Name		
VERSION : Version REPLACING: Superseded Date ISSUE		
CASE :	_____	SSN : _____
DETER NUM :	_____	
BUDGET NUM :	_____	
CERT PERIOD :	_____	
SECTION : Section Name		
NOTES :	_____	

INSTRUCTIONS : Instructions		
	Instructions	
Tmplt Line Num	Line Description _____	
	line instructions_____	
	line instructions_____	

Tmplt Line Num	Line Description _____	
	line instructions_____	
	line instructions_____	

*** End of Report ***		

Spenddown Section

1 2 3 4 5 6 7 8
 1234567890123456789012345678901234567890123456789012345678901234567890

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MM DD,YYYY	BUDGET WORKSHEET	Job Name
HH:MM AM		Job Number
TEMPLATE: Template ID Template Name		
VERSION : Version REPLACING: Superseded Date ISSUE		
CASE :	_____	SSN : _____
DETER NUM :	_____	
BUDGET NUM :	_____	
CERT PERIOD :	_____	
SECTION : Section Name		
NOTES :	_____	

INSTRUCTIONS : Instructions		
	Instructions	
Excess Spenddown Amount:		
Date_____	Medical Bill Description_____	Amount_____ Balance_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
TOTAL	_____	
*** End of Report ***		

COLA Section

1 2 3 4 5 6 7 8
 1234567890123456789012345678901234567890123456789012345678901234567890

*PROGRAM	DEPARTMENT OF HEALTH AND HOSPITALS	Page: 0001
MM DD,YYYY	BUDGET WORKSHEET	Job Name
HH:MM AM		Job Number
TEMPLATE: Template ID Template Name VERSION : Version REPLACING: Superseded Date ISSUE		
CASE :	_____	SSN : _____
DETER NUM :	_____	
BUDGET NUM :	_____	
CERT PERIOD :	_____	
SECTION : Section Name		
NOTES : Section Notes _____		

INSTRUCTIONS : Instructions		
Instructions		
Instructions		
Instructions		
Instructions		
Year	Benefit_____	COLA % COLA Amount Notes_____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
Year	_____	COLA % _____
TOTAL	_____	
*** End of Report ***		