



**CALIFORNIA CORRECTIONAL  
HEALTH CARE SERVICES**



# IDTD Business Analysis

## Business Requirements Document (BRD)

This is a work in progress draft version of the business requirement document. The intent is to give an idea of the scope of conversion effort for the application.

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# IDTD Application Business Analysis

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## Introduction

This business requirements document is the primary tool for structuring requirements-gathering activities that will occur for IDTD (Interim Dental Tracking Database) project. It is intended for use by all stakeholders in the IDTD project including the project sponsor, project coordinators, and key business and technology subject matter experts.

## Background

The California department of corrections and rehabilitation needs to replace its current system for the tracking of dental appointments implemented at its various institutional facilities. The current application has been designed in Microsoft Access 2007. This application's implementation specific to the Central California Women's Facility was provided for analysis to determine if this application can be converted into a web application. This intended web application will allow the user to carry on their day to day activities with respect to dental appointments at the institutional facilities that are currently supported by the access based application.

## Scope

Currently all the functionality provided by the existing MS Access application is considered in scope for the purpose of this document.

## Intended Audience

This document is intended for use by all stakeholders in the IDTD project including the project sponsor, project coordinator, key business and technology subject matter experts.

## Types of Requirements

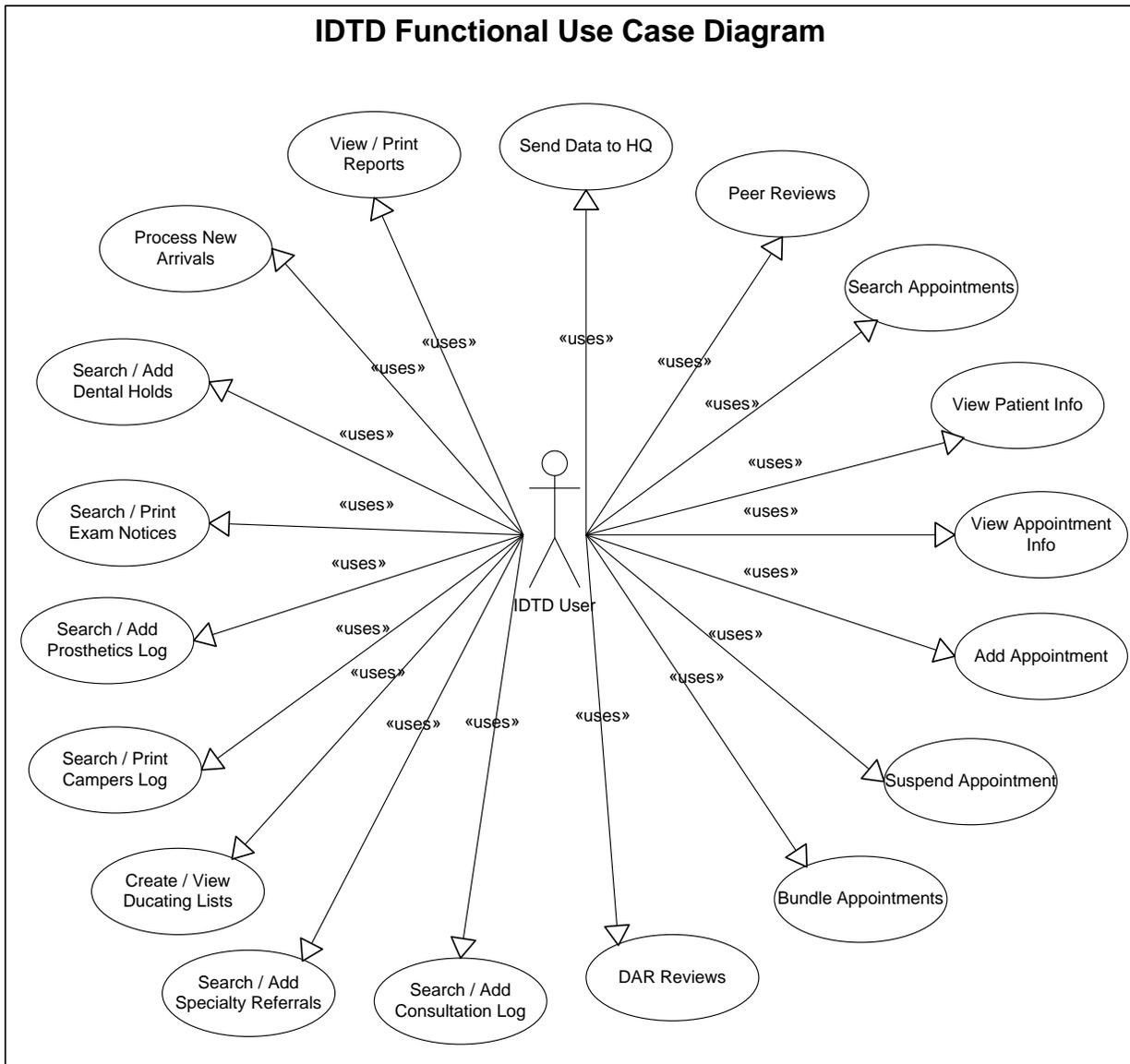
**Functional requirements** can only be derived following elicitation and documentation of business and user requirements. The distinctions between these different requirements levels are important.

1. **Regulatory Requirements**—encompass all the restrictions, licenses, and laws applicable to a product or business. They may be internal (driven by the company itself) or external (driven by a government or other regulatory body), and are usually nonnegotiable.
2. **Business / Functional Requirements**—place the business at the center of focus and tie the project to documented strategic, tactical, and operational goals. If developing products or services as part of the overall direction of the company, product or service features need to be covered at a high level in this section, then in detail under User Requirements.

**Nonfunctional Requirements**—refer to system characteristics that must be fulfilled related to things like the user interface, access security, availability, robustness, system failure, integration, migration, and documentation. As such, they do not deal with the actual functionality of the system, but nevertheless represent key project success factors.

## Functional / Business Requirements:

The following diagram represents a simple overview of the IDTD application:



**Requirements:**

These requirements determine project success and will be included in this release. These items represent core functionality and must be present.

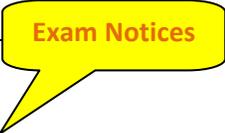
*The yellow callouts added to the business requirements correspond to the screens in the existing MS Access application as described in Appendix – A of this document.*

BR	Sub BR	Business Requirements
BR-01		<p>IDTD users will be able to search for all the records in the system where an inmate is yet to be seen by the provider. These are the records where appointments need to be scheduled in the system and the records where an appointment has been scheduled in the system. The appointment data can be searched upon using the following filters:</p> <ol style="list-style-type: none"><li>1. CDCR #</li><li>2. Last Name</li><li>3. Appointment ID</li><li>4. Date Range (Start/End Dates)</li><li>5. Institution (drop-down box populated with all the institutions in the system and the default value of the user’s institution).</li><li>6. Dental Clinic (driven by the selected institution)</li><li>7. Appointment Type</li><li>8. Provider</li><li>9. Previous DPC</li><li>10. Status (Open / Closed / Suspended)</li></ol> <p>The appointment search results will be displayed in a grid containing the following columns:</p> <ol style="list-style-type: none"><li>1. Bundled (Yes / No)</li><li>2. CDCR #</li><li>3. Last Name</li><li>4. First Name</li><li>5. Dental Clinic</li></ol>

BR	Sub BR	Business Requirements
		<ul style="list-style-type: none"> <li>6. Bed #</li> <li>7. Mainline or Reception Center (ML or RC)</li> <li>8. EPRD</li> <li>9. DPC Before</li> <li>10. Schedule By Date</li> <li>11. TIC Date</li> <li>12. Appt Date</li> <li>13. Appt Reason</li> <li>14. Provider</li> <li>15. Notes</li> </ul> <p>The user should be able to sort the results through the grid column headers.</p> 
	1.1	<p>The user should be able to drill down into any of the individual record displayed as part of the search appointment results. A hyperlink should be provided on the CDCR# column value in the search results grid. Clicking on this hyperlink will allow the user to drill-down information pertaining to the following:</p> <ul style="list-style-type: none"> <li>1. Patient Information</li> <li>2. Appointment Information</li> <li>3. 7362 Information</li> <li>4. Procedure (Encounter Form) information</li> <li>5. Appointment Information</li> <li>6. Reschedule / Suspension Information</li> </ul> 
	1.1.1	<p>Patient Information should show the following information about the inmate:</p> <ul style="list-style-type: none"> <li>1. First Name</li> <li>2. Last Name</li> <li>3. CDCR #</li> <li>4. Date of birth</li> <li>5. Ethnicity</li> <li>6. EPRD</li> <li>7. Housing</li> <li>8. Type of housing</li> <li>9. Dental Clinic</li> <li>10. Mainline or Reception Center</li> </ul>

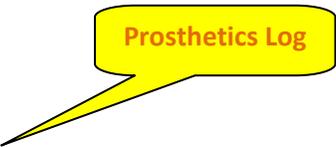
BR	Sub BR	Business Requirements
		<ul style="list-style-type: none"> <li>11. Current Plaque Index</li> <li>12. Latest Comprehensive Exam Date</li> </ul>
	1.1.2	<p>Appointment Information should show the following information pertaining to the current appointment:</p> <ul style="list-style-type: none"> <li>1. Appointment Type</li> <li>2. Appointment Reason</li> <li>3. Appointment Date</li> <li>4. Appointment Time</li> <li>5. Dentist / Hygienist</li> <li>6. Location of Service</li> <li>7. Chair Start Time</li> <li>8. Chair End Time</li> <li>9. UHR Present flag (Yes/No)</li> <li>10. Appointment Notes / Comments</li> <li>11. Next Appointment Reason</li> <li>12. Tic Date</li> <li>13. Next Appointment Notes / Comments</li> <li>14. Appointment Not Complete Reason</li> <li>15. Dental Treatment Plan Diagnosis Date</li> <li>16. Dental Treatment Plan DPC</li> <li>17. Previous DPC</li> <li>18. Current DPC</li> <li>19. Further Treatment Requested (Yes / No)</li> <li>20. Ineligible for further treatment reason</li> <li>21. Schedule Appointment By Date</li> <li>22. Original Appointment Date</li> <li>23. Appointment Completed Date</li> </ul>
	1.1.3	<p>7362 information should show the following information pertaining to the current appointment in the context of a patient:</p> <ul style="list-style-type: none"> <li>1. Tracking Number</li> <li>2. Request Date</li> <li>3. Received Date</li> <li>4. Review Date</li> <li>5. Complaint</li> <li>6. PRC</li> <li>7. Review Dentist</li> </ul>
	1.1.4	<p>Procedure / Encounter Information section should show the following information pertaining to the current appointment:</p>

BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>1. Number of procedures</li> <li>2. Procedure code</li> <li>3. Procedure</li> <li>4. Date performed</li> </ol> <p>The procedure information may be present or can be added to an existing open appointment and as such it should be available where applicable otherwise should provide the facility to be added through an editable data grid.</p> <p>Further the user should also have the ability to delete information from the procedure grid.</p>
	1.1.5	<p>Reschedule / Suspension information section should show the following information pertaining to an appointment:</p> <ol style="list-style-type: none"> <li>1. Previous appointment date</li> <li>2. Reason (why the appointment was not completed?)</li> <li>3. Notes</li> <li>4. Original schedule by date</li> <li>5. Move from clinic date</li> <li>6. Suspension date</li> </ol>
	1.1.6	<p>The user should be able to navigate to the following once he is working on the current appointment record:</p> <ol style="list-style-type: none"> <li>1. Campers Log</li> <li>2. Camp treatments started (for a given camp #)</li> <li>3. Camp treatments ended (for a given camp#)</li> <li>4. Add / Edit PSR scores</li> </ol>
	1.1.7	<p>The user should also be able to print the following forms while he is working on the current appointment record:</p> <ol style="list-style-type: none"> <li>1. Print an encounter form</li> <li>2. Print a 128-D chrono</li> </ol>
	1.1.8	<p>The user should be able to delete the current appointment record after specifying a reason for removal of the appointment.</p>
BR-02		<p>The user should be able to create a new appointment record in the system for a given CDCR # pertaining to a patient inmate.</p>
	2.1	<p>The user should be able to create a new appointment record in the system even if the patient inmate does not exist in the SOMS download list.</p>
BR-03		<p>The system should provide user the ability to view the list of dental holds. The list should be provided in the form of a grid with the following columns:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> </ol>

BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>4. Current housing</li> <li>5. Date when the dental hold was placed</li> <li>6. DDS placing the hold</li> <li>7. Reason for hold</li> <li>8. DPC (Dental Priority Classification)</li> <li>9. SD approval</li> <li>10. Notes</li> <li>11. Date when the hold was removed</li> <li>12. DDS removing the hold</li> </ol> 
	3.1	<p>The user should be able to filter the dental hold records for the following:</p> <ol style="list-style-type: none"> <li>1. Show all the records</li> <li>2. Show only the open records</li> </ol>
	3.2	<p>The user should also be able to print the following forms upon selecting a record while he is viewing the dental holds:</p> <ol style="list-style-type: none"> <li>1. Print placement chrono</li> <li>2. Print removal chrono</li> </ol> <p>The user should also be able to print the list of all the open dental holds in the system from this screen.</p>
	3.3	<p>The system should also provide the user to add a new dental hold. A new dental hold may be added for a given inmate once the user provides the following information:</p> <ol style="list-style-type: none"> <li>1. CDCR#</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Current housing</li> <li>5. Date when the dental hold was placed</li> <li>6. DDS placing the hold</li> <li>7. Reason for hold</li> <li>8. DPC (Dental Priority Classification)</li> <li>9. SD approval</li> <li>10. Notes</li> </ol>
	3.4	<p>The system should also provide the user to remove an existing dental hold. An existing dental hold may be removed for a given inmate once the user provides the following information:</p> <ol style="list-style-type: none"> <li>1. Notes</li> <li>2. Date when the hold was removed</li> <li>3. DDS removing the hold</li> </ol>
BR-04		<p>The system should provide user the ability to view the list of exam notices. The list should be provided in the form of a grid with the following columns:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> </ol> 

BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>2. Last name</li> <li>3. Date of birth</li> <li>4. Ethnicity</li> <li>5. Earliest possible release date (EPRD)</li> <li>6. Housing</li> <li>7. Mainline or Reception center</li> <li>8. DPC (Dental Priority Classification)</li> <li>9. Dental clinic</li> <li>10. Dentist</li> <li>11. Chronic</li> <li>12. Last Exam date</li> <li>13. Last Notice (sent) date</li> <li>14. Notice due</li> <li>15. Reason</li> <li>16. 7362 received</li> <li>17. Arrival date</li> </ol> <p>The user should be able to filter the exam notices list on the following criteria:</p> <ol style="list-style-type: none"> <li>1. All records (UHR's reviewed plus encounters / layovers)</li> <li>2. Overdue notices</li> <li>3. 7362's received</li> <li>4. Inmate details ( CDCR#, First name and Last name)</li> </ol> <p>The user should also be able to sort the list of exam notices on any of the following three criteria:</p> <ol style="list-style-type: none"> <li>1. CDCR#</li> <li>2. Last Name</li> <li>3. Housing</li> <li>4. Dental clinic</li> <li>5. Dentist</li> <li>6. Last exam date</li> <li>7. Last notice date</li> <li>8. Reason</li> <li>9. 7362 received date</li> <li>10. Notice due date</li> <li>11. Chronic</li> <li>12. Marked for print</li> </ol>
	4.1	<p>The user should have the following print capabilities once he is on this screen:</p> <ol style="list-style-type: none"> <li>1. Print a blank exam notice</li> <li>2. Print multiple exam notices for the selected records.</li> </ol>

BR	Sub BR	Business Requirements
	4.2	The system should color the overdue notices in a different color in the list of exam notices.
BR-05		<p>The system should provide user the ability to view the list of prosthetics administered to the inmate. The list should be provided in the form of a grid with the following columns:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Housing</li> <li>5. Camp</li> <li>6. Dentist</li> <li>7. FUD (Full upper denture)</li> <li>8. FLD (Full lower denture)</li> <li>9. PUD (partial upper denture)</li> <li>10. PLD (partial lower denture)</li> <li>11. Night guard</li> <li>12. Repair</li> <li>13. Reline</li> <li>14. Last activity date</li> <li>15. Disposition</li> <li>16. Disposition ID</li> <li>17. Notes</li> </ol> <p>The user should be able to filter the prosthetics list on the following criteria:</p> <ol style="list-style-type: none"> <li>1. Open records (no disposition available)</li> <li>2. All records (open &amp; closed)</li> <li>3. All the records for a given CDCR #</li> <li>4. All the records for a given inmate name (Last name, first name)</li> </ol> <p>The user should also be able to sort the prosthetics list on any of the following three criteria:</p> <ol style="list-style-type: none"> <li>1. CDCR#</li> <li>2. Last name, First name</li> <li>3. Last activity date</li> <li>4. Dentist</li> </ol>
	5.1	<p>The user should have the following print capabilities once he is on this screen:</p> <ol style="list-style-type: none"> <li>1. Prosthetics report.</li> <li>2. 128-C chrono 'Appliance delivered to inmate'</li> </ol>
	5.2	<p>The user should also be able to add a new record to the prosthetics log after providing the following minimum required information:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> </ol>



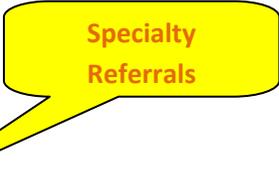
BR	Sub BR	Business Requirements
		<p>2. Provider</p> <p>Further the user can also indicate the camp of the inmate, by selecting the camp #.</p> <p>The user needs to fill out the following fields to add a new record to the prosthetics log:</p> <ol style="list-style-type: none"> <li>1. Case Type (FUD, PUD, FLD, PLD, Night Guard, Repair, Reline)</li> <li>2. Initial date (when the processes started)</li> <li>3. Last activity date</li> <li>4. Notes</li> <li>5. Final disposition</li> <li>6. Disposition date</li> <li>7. Mailed out to</li> </ol> <p>The following set of fields need to have the date when they were sent to the lab (Date sent to lab), date they were received from the lab (Date received from lab) and if it was a defective item (the date when it was returned to the lab due to being defective):</p> <ol style="list-style-type: none"> <li>1. Custom Tray</li> <li>2. Impression</li> <li>3. Wax Bite/ Occlusal Rim</li> <li>4. Metal Frame</li> <li>5. Wax Try-In 1</li> <li>6. Wax Try-In 2</li> <li>7. Wax Try-In Finish</li> <li>8. Process/Finish</li> <li>9. Repair</li> <li>10. Reline</li> </ol> <p>Further the user needs to fill in the charges (amount in \$) for the following fields:</p> <ol style="list-style-type: none"> <li>1. Custom Tray</li> <li>2. Impression</li> <li>3. Wax Bite/ Occlusal Rim</li> <li>4. Metal Frame</li> <li>5. Wax Try-In 1</li> <li>6. Wax Try-In 2</li> <li>7. Wax Try-In Finish</li> <li>8. Process/Finish</li> <li>9. Repair</li> <li>10. Reline</li> </ol> <p>The system would automatically calculate the total charges, and the user can fill in the dollar amount for the charges that are attributed to the inmate.</p>
	5.3	The user should be able to create an appointment record in the system for the newly added prosthetics log entry.

BR	Sub BR	Business Requirements
BR-06		<p>The system should provide the capability to view the list of inmates in camps. This list should be made available through the camper log. Once the user is on this screen he should be able to see the results in a grid detailing information about the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Camp #</li> <li>5. Begin date</li> <li>6. End date</li> <li>7. Completed – Yes / No flag</li> </ol> <p>The user should also be able to filter the camper log based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. Still being treated</li> <li>2. Treatments ended</li> </ol> <p>The user should be able to sort the log details grid on the following criteria:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Log End Date (Latest)</li> <li>3. Last name, First name</li> <li>4. Camp #, Last name</li> </ol> <p>The user should be able to print a list of records for the inmates for a given camp that are on the “to be scheduled list”.</p> 
	6.1	<p>The user should be able to view the camping history for a given CDCR#.</p>
BR-07		<p>The system should provide the capability to view the list of appointments according to the program. This list should be made available through the program appointments log. Once the user is on this screen he should be able to see the results in a grid detailing information about the following fields:</p> <ol style="list-style-type: none"> <li>1. Appointment #</li> <li>2. CDCR #</li> <li>3. Last name</li> <li>4. First name</li> <li>5. Program name</li> <li>6. Program appointment reason</li> <li>7. Appointment date</li> <li>8. Schedule by date</li> <li>9. Provider</li> <li>10. Closed – Yes / No flag</li> <li>11. Appointment Notes</li> </ol> <p>The user should be able to filter the records based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. Open appointments</li> </ol> 

BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>2. Still being treated – All</li> <li>3. No open appointments</li> <li>4. CDCR #</li> <li>5. Inmate Name (Last name, First name and CDCR #)</li> </ol> <p>The user should be able to sort the grid results according to the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR#</li> <li>2. Appointment Reason, Program</li> <li>3. Appointment Date (Ascending or Descending)</li> <li>4. Last name, First name</li> <li>5. Program appointment reason</li> </ol> <p>The user should also be able to view the open appointment records for a given CDCR#.</p>
BR-08		<p>The system should provide the capability to view the list of dental consultations. This list should be made available through the dental consultation log. Once the user is on this screen he should be able to see the results in a grid detailing information about the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Housing</li> <li>5. Dentist</li> <li>6. Consultation Description</li> <li>7. Request / Refer date</li> <li>8. Reviewed date</li> <li>9. Consultation Date</li> <li>10. Consultation Notes</li> <li>11. Received from lab</li> </ol> <p>The user should be able to filter the records based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. Open consultations</li> <li>2. All consultations</li> <li>3. CDCR #</li> <li>4. Inmate Name (Last name, First name and CDCR #)</li> </ol> <p>The user should be able to sort the grid results according to the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR#</li> <li>2. Last name, First name</li> <li>3. Consultation description</li> <li>4. Dentist</li> </ol>
	8.1	<p>The system should also allow the user to view the open consultations for the inmates not at the institution anymore.</p>



BR	Sub BR	Business Requirements
	8.2	<p>The user should be able to print the following from this screen:</p> <ol style="list-style-type: none"> <li>1. All the open consultations for a given date range.</li> <li>2. All the closed consultations for a given date range.</li> </ol>
	8.3	<p>The system should allow the user to recalculate the overdue dates.</p>
	8.4	<p>The system should allow the user to add a new consultation log entry. The following information needs to be captured for a new consultation log entry:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Requesting provider</li> <li>3. Consultation description</li> <li>4. Referral requested date or Biopsy / Lab taken date</li> <li>5. Lab results received date or medical clearance date</li> <li>6. Dentist reviewed lab results date / clearance date</li> <li>7. Patient informed about consultation / lab results date</li> <li>8. Close consultation – Yes / No flag</li> <li>9. Notes about the consultation</li> </ol>
	8.5	<p>The system should allow the user to create a new appointment record for a consultation.</p>
BR-09		<p>The system should allow the user to view the list of specialty referrals (Request for service) records. This list should be made available in the form specialty referrals log. Once the user is on this screen he should be able to see the results in a grid detailing information about the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Inmate name</li> <li>3. Housing</li> <li>4. Referral date</li> <li>5. Referring dentist</li> <li>6. Requested service</li> <li>7. Priority</li> <li>8. RFS (request for service) Notes</li> <li>9. RFS disposition date</li> <li>10. RFS disposition</li> <li>11. Specialist</li> <li>12. Service location</li> <li>13. Scheduled appointment date</li> <li>14. Actual treatment date</li> <li>15. Closed (Yes/No)</li> </ol> <p>The user should be able to filter the records based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. Open referrals</li> </ol>



BR	Sub BR	Business Requirements
		<ul style="list-style-type: none"> <li>2. Open and closed all referrals</li> <li>3. CDCR #</li> <li>5. Inmate Name (Last name, First name and CDCR #)</li> </ul> <p>The user should be able to sort the grid results according to the following fields:</p> <ul style="list-style-type: none"> <li>1. CDCR#</li> <li>2. Inmate Name</li> <li>3. Referral date</li> <li>4. Referring Dentist</li> <li>5. Treatment date</li> <li>6. Housing (Current)</li> </ul>
	9.1	<p>The user should be able to print the following from this screen:</p> <ul style="list-style-type: none"> <li>1. Oral surgery log</li> <li>2. Closed referrals for a given date range.</li> <li>3. Unscheduled referrals</li> </ul>
	9.2	<p>The system should allow the user to add a specialty referral for a selected CDCR #. The following information is required in order to add a specialty referral into the system:</p> <ul style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Referring dentist</li> <li>3. Requested service</li> <li>4. Referral Priority</li> <li>5. Date RFS submitted to DAR / Supervising DDS</li> <li>6. Dental Necessity / Justification</li> <li>7. Notes from DAR / Supervising DDS</li> <li>8. Date of RFS disposition by DAR / Supervising DDS</li> <li>9. Disposition of RFS by DAR / Supervising DDS</li> <li>10. Specialist Name</li> <li>11. Off-Site Specialist Name</li> <li>12. Specialist Type</li> <li>13. Location of service</li> <li>14. Original scheduled appointment date</li> <li>15. Reason(s) for rescheduling appointment</li> <li>16. Treatment summary</li> <li>17. Actual treatment date</li> <li>18. Treatment cancelled (Yes / No)</li> <li>19. Treatment cancellation date</li> </ul>
	9.3	<p>The system should allow the user to create a new appointment record for a specialty referral.</p>
BR-10		<p>The system should allow the user to view the list of specialty referrals for auditing purposes. This list will be made available through the specialty services audit log. The audit details will</p>

BR	Sub BR	Business Requirements
		<p>be displayed in a grid on the screen. The grid will contain the following fields of information:</p> <ol style="list-style-type: none"> <li>1. Date of service</li> <li>2. CDCR#</li> <li>3. Inmate name</li> <li>4. Specialist name</li> <li>5. RFS authorization date</li> <li>6. Procedures authorized by DAR</li> <li>7. Select for printing</li> <li>8. Is audit complete (yes / no)</li> </ol> 
	10.1	<p>The user should be able to filter the specialty audit records based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. Show incomplete</li> <li>2. Show completed</li> </ol>
	10.2	<p>The user should be able to print the following from this screen:</p> <ol style="list-style-type: none"> <li>1. Selected records for dental specialty audit</li> <li>2. UHR request list based on location and date when the UHRs will be needed.</li> <li>3. UHR out slips.</li> </ol>
BR-11		<p>The system should allow the user to view suspended appointments. This list will be made available through the suspended appointments log. The appointment details will be displayed in a grid on the screen. The grid will contain the following fields of information:</p> <ol style="list-style-type: none"> <li>1. CDCR#</li> <li>2. Last name</li> <li>3. Housing</li> <li>4. Appointment Type</li> <li>5. Appointment not completed reason</li> <li>6. Program</li> <li>7. Institution</li> <li>8. Marked for suspension – Yes / No</li> <li>9. Suspension date</li> <li>10. Scheduled by date</li> <li>11. Review date</li> <li>12. Appointment notes</li> <li>13. Previous DPC</li> </ol>  <p>The user should be able to view the suspended appointment record(s) for a given CDCR #, Last Name and First Name.</p> <p>The user should be able to sort the grid results according to the following fields:</p> <ol style="list-style-type: none"> <li>1. Inmate Name</li> <li>2. Housing</li> </ol>

BR	Sub BR	Business Requirements
		The user should also be able to print the list of suspended appointments.
BR-12		<p>The system should allow the user to search for inmates with multiple records in appointments and bundle them. The appointment details will be shown in a grid containing information about the following fields:</p> <ol style="list-style-type: none"> <li>1. Schedule by date</li> <li>2. Appointment Id</li> <li>3. CDCR #</li> <li>4. Last name</li> <li>5. First name</li> <li>6. Appointment type</li> <li>7. Appointment reason</li> <li>8. 7362 received date</li> <li>9. 7362 chief complaint</li> <li>10. Appointment date</li> <li>11. Provider</li> <li>12. Encounter location</li> </ol> 
BR-13		<p>The system should allow the user to view the inmates information received from the SOMS download. The inmate information details will be shown in a grid containing information about the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR number</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Birth date</li> <li>5. Ethnicity</li> <li>6. Housing</li> <li>7. Arrival institution</li> <li>8. Arrival from (institution)</li> <li>9. Arrival date</li> <li>10. TB code</li> </ol> <p>The list of inmates from SOMS download should allow sort on the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. Housing</li> <li>4. Arrival from (institution)</li> <li>5. Arrival into (institution)</li> <li>6. Arrival date</li> </ol> <p>The list of inmates from SOMS download should allow the user to filter the results on the</p> 

BR	Sub BR	Business Requirements
		following fields: <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Housing</li> </ol>
	13.1	The system should allow the user to change the CDCR # for a given inmate record in the SOMS download list.
BR-14		The system should allow the user to perform peer reviews of clinicians for the appointments they have undertaken. As such the user can select the clinician who is being reviewed and a case type to get the list of appointments that match the criteria. The list of appointments should be shown in a grid with the following fields of information: <ol style="list-style-type: none"> <li>1. Appointment Id</li> <li>2. CDCR #</li> <li>3. Inmate / Patient name</li> <li>4. Date of birth</li> <li>5. EPRD date</li> <li>6. Ethnicity</li> <li>7. Encounter location</li> <li>8. Appointment date</li> <li>9. Provider</li> <li>10. Appointment reason</li> <li>11. Number of procedures</li> <li>12. Procedure code</li> </ol>
	14.1	The system should allow the user to create a separate list of the records selected for review. Further the user should be allowed to print such list and clear these lists.
	14.2	The system should allow the user to print the following from the peer review screen: <ol style="list-style-type: none"> <li>1. UHR request list</li> <li>2. UHR out slips</li> <li>3. 237-C-1</li> </ol>
BR-15		The system should allow the user to process new inmates arriving into the institution. Inmates can arrive in the following two ways: <ol style="list-style-type: none"> <li>1. Mainline UHR reviews</li> <li>2. Reception center dental screenings.</li> </ol>
	15.1	The mainline UHR review form should allow the user to add inmate information into the system pertaining to the following fields: <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Date of birth</li> </ol>

**Chart Pulls Peer Reviews**

**Process New Arrivals**

BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>5. Housing</li> <li>6. Arrival from</li> <li>7. Transfer in date</li> <li>8. UHR reviewer</li> <li>9. Review date</li> <li>10. Follow up date</li> <li>11. UHR review complete (yes/no)</li> </ol> <p>The user should be able to see the list of inmates that were transferred into mainline reviews via a grid containing information about the following fields:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> <li>4. Date of birth</li> <li>5. Housing</li> <li>6. Arrival from</li> <li>7. Transfer in date</li> <li>8. UHR reviewer</li> <li>9. Review date</li> <li>10. Follow up date</li> <li>11. UHR review complete (yes/no)</li> </ol> <p>The user should be able to filter the grid results for the incomplete and completed records (incomplete – means UHR review not yet completed and complete – means UHR review has been completed).</p> <p>The user should be able to sort the incomplete records based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Inmate name</li> <li>3. Transfer in date</li> <li>4. Reviewer name</li> </ol>
	15.2	<p>The user should be able to view a completed record (meaning UHR review has been completed) for a given CDCR #. Once the user selects a CDCR # the following information should be displayed on the screen in read only format:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name</li> <li>3. First name</li> <li>4. DOB</li> <li>5. Ethnicity</li> <li>6. EPRD date</li> </ol>

BR	Sub BR	Business Requirements
		<ul style="list-style-type: none"> <li>7. Housing</li> <li>8. Type of housing</li> <li>9. ML or RC (not required since it will always be ML in this case!!)</li> <li>10. Dental Clinic</li> <li>11. Dentist</li> <li>12. Date of transfer in</li> <li>13. Arrival from</li> <li>14. Transferred from a mainline facility – yes / no</li> <li>15. Transferred from a reception center – yes / no</li> <li>16. UHR reviewer</li> <li>17. UHR review date</li> <li>18. Follow up review : UHR was reviewed – yes / no</li> <li>19. Follow up review date</li> <li>20. Question # 13 on the bus screening form was “Yes” and /or the RN made a dental referral – yes / no</li> <li>21. Initial review done (UHR was reviewed) – yes / no</li> <li>22. Dental record available in UHR – yes / no</li> <li>23. Last encounter in UHR was REFUSED – yes / no</li> <li>24. Was a DPC found in UHR – yes / no</li> <li>25. Enter the latest DPC found in UHR (code 1,2,3)</li> <li>26. DPC diagnosis date</li> <li>27. Was a comprehensive exam date found in UHR – yes / no</li> <li>28. Latest comprehensive exam date</li> <li>29. Was a plaque index found in UHR – yes / no</li> <li>30. Latest plaque index found in UHR</li> <li>31. Plaque index date</li> <li>32. Chronic medical condition – yes / no</li> <li>33. Notes</li> <li>34. UHR review marked complete – yes / no</li> </ul>
	15.3	<p>The reception center intake dental screenings form should allow the user to add inmate information into the system pertaining to the following fields:</p> <ul style="list-style-type: none"> <li>1. Arrival date</li> <li>2. CDCR #</li> <li>3. Last name</li> <li>4. First name</li> <li>5. Ethnicity</li> <li>6. Housing</li> <li>7. Oral health received – yes / no</li> <li>8. Pamphlet refused – yes / no</li> </ul>

BR	Sub BR	Business Requirements
		<p>9. Panorex talk  10. Panorex refused – yes / no  11. Marked for completion – yes / no</p> <p>The user should be able to filter the grid results for the incomplete and completed records (incomplete – means still in progress not yet completed and complete – means reception center dental screening has been completed).</p>
BR-16		<p>The system should allow the user to view the list of records for which an appointment may be reviewed or cancelled due to EPRD (Earliest possible release date).</p> <p>The user should also be able to filter the list of inmates according to EPRD based on encounter location and should have the capability to view the list for all the locations.</p> <p>The appointment details should be shown in a grid with the following fields of information:</p> <ol style="list-style-type: none"> <li>1. Appointment Id</li> <li>2. CDCR #</li> <li>3. Name</li> <li>4. EPRD date</li> <li>5. Ineligible reason</li> <li>6. DPC</li> <li>7. Appointment reason</li> <li>8. Appointment date</li> <li>9. Schedule by date</li> <li>10. Appointment location</li> <li>11. Reviewed – yes / no</li> <li>12. Appointment not completed reason</li> </ol> <p>The user should be able to sort the grid results based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name, First name</li> <li>3. Schedule by date</li> <li>4. Provider</li> </ol>
BR-17		<p>The system should provide the capability to allow the user to send monthly and weekly data to headquarters.</p>
BR-18		<p>The system should allow the user to view and print reports. The reports can be broadly divided into the following categories:</p> <ol style="list-style-type: none"> <li>1. Appointments</li> <li>2. UHR Audits</li> <li>3. Camp Appointments</li> </ol>



BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>4. COT (Court Ordered Timeframe) Reports</li> <li>5. Comprehensive Exam Reports</li> <li>6. Daily Dental Encounter Reports</li> <li>7. DDEF Reports</li> <li>8. Prosthetics Log Reports</li> <li>9. RC Inmate Reports</li> <li>10. Specialty Referrals - Reports</li> <li>11. EPRD Reports</li> <li>12. Intake Dental UHR Review</li> <li>13. Interim Dental Clinic Reports</li> <li>14. Suspended Appointments</li> <li>15. Timeframe Reports</li> <li>16. Validation Reports</li> <li>17. Miscellaneous</li> </ol> <p>Each of these categories contains multiple reports and as such they will list in a separate business requirement.</p> 
BR-19		<p>The system should support data integration and interfacing with external systems like SOMS and ARDTS.</p>
BR-20		<p>The system should allow the user to view the disability and effective communication / reasonable accommodation log. This log should provide the following details:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last Name</li> <li>3. First Name</li> <li>4. Mobility Impaired Code</li> <li>5. Developmentally Disabled Code</li> <li>6. Effective Communication Code</li> <li>7. Primary Method</li> <li>8. Alternate Method</li> <li>9. Educational Learning Disability</li> <li>10. SLI Needed</li> <li>11. RC Extended Stay</li> <li>12. TABE Score</li> <li>13. Non English Language</li> </ol> <p>The user should be able to filter the grid results based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. Current Inmates only</li> <li>2. All Inmates Entered</li> <li>3. All Records</li> </ol> 

BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>4. Mobility Impaired only</li> <li>5. Developmentally disabled only</li> <li>6. Effective communication only</li> <li>7. Developmentally Disabled Code</li> <li>8. Effective Communication Code</li> <li>9. Learning Disability only</li> <li>10. TABE Scores &lt;= 4.0 only</li> <li>11. RC Extended Stay only</li> <li>12. Non-English Language only</li> </ol> <p>The user should be able to find any record after providing the patient inmate CDCR #, First Name and Last Name</p> <p>The user should be able to sort the grid results based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last name, First</li> </ol>
	20.1	<p>The system should allow the user to add a new record to the disability &amp; effective communication list by providing the following information:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last Name</li> <li>3. First Name</li> <li>4. Mobility Impaired Code</li> <li>5. Developmentally Disabled Code</li> <li>6. Effective Communication Code</li> <li>7. Primary Method</li> <li>8. Alternate Method</li> <li>9. Educational Learning Disability</li> <li>10. SLI Needed</li> <li>11. RC Extended Stay</li> <li>12. TABE Score</li> <li>13. Non English Language</li> </ol>
	20.2	<p>The system should allow the user to print the list of records from the disability &amp; effective communication list for the following criteria:</p> <ol style="list-style-type: none"> <li>1. Mobility Impaired only</li> <li>2. Developmentally disabled only</li> <li>3. Effective communication only</li> <li>4. Educational Learning Disability only</li> <li>5. TABE score &lt;= 4</li> <li>6. RC Extended Stays only</li> </ol>

BR	Sub BR	Business Requirements
BR-21		<p>The system should allow the institutional HPS-1 type of user to add records to the following lists:</p> <ol style="list-style-type: none"> <li>1. Dental Clinics &amp; Encounter Locations</li> <li>2. Staff and Contracted Service Providers</li> <li>3. Ducat Requestors</li> <li>4. Dental Assistants</li> <li>5. Staff Dentist Assignment</li> <li>6. Non SOMS housing</li> <li>7. Appointment Programs</li> </ol> 
BR-22		<p>The system should allow the user to integrate SOMS housing set up with the IDTD housing set up and also view the housing set up in SOMS. The housing set up in SOMS list should display the following information to the user:</p> <ol style="list-style-type: none"> <li>1. Housing</li> <li>2. Arrival Into</li> <li>3. Mainline or Reception Center</li> <li>4. Type of Housing</li> <li>5. Dental Housing</li> <li>6. Dental Clinic</li> </ol>  <p>The user should be able to sort the grid results based on the following criteria:</p> <ol style="list-style-type: none"> <li>1. SOMS housing</li> <li>2. ML or RC</li> <li>3. Type of housing</li> </ol> <p>The user should also be able to see blank dental housing and blank dental clinics using this form.</p>
BR-23		<p>The system should allow the user to view the list of X-Rays. The list of X-Rays should be displayed in a grid containing the following fields of information:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last Name</li> <li>3. First Name</li> <li>4. Last FMX Date</li> <li>5. Last BWX/PA Date</li> <li>6. Last PANO Date</li> </ol>  <p>The user should be able to filter the X-Ray records for the patient inmates currently at the institution as well as all the X-Ray records for the institution.</p> <p>The user should be able to sort the X-Ray records grid on the following criteria:</p>

BR	Sub BR	Business Requirements
		<ol style="list-style-type: none"> <li>1. Inmate Patient Name</li> <li>2. CDCR #</li> <li>3. Latest FMX date</li> <li>4. Latest BWX date</li> <li>5. Latest PANO date</li> </ol> <p>The user should also be able to find X-Ray records for a given CDCR # and patient inmate name.</p>
	23.1	<p>The user should be able to add a new X-Ray record in the system after providing the following information:</p> <ol style="list-style-type: none"> <li>1. CDCR #</li> <li>2. Last Name</li> <li>3. First Name</li> <li>4. Last FMX Date</li> <li>5. Previous FMX</li> <li>6. Last BWX/PA Date</li> <li>7. Previous BWX/PA Date</li> <li>8. Last PANO Date</li> <li>9. Previous PANO Date</li> </ol> <p>The system saves the record and this record is available in the X-Ray list displayed to the user.</p>
BR-24		<p>A new initiative is underway to unify the appointment scheduling system and reduce conflicts between different applications such as IDTD, MHTS, TMSS and IMSATS. All the applications are required to store their appointment related scheduling data in a common data store called the healthcare operational data store (HCODS). This common repository will serve as the means to determine appointment scheduling conflicts between the different applications for a given patient inmate's appointment. The HCODS system will provide an interface (implemented through a web service hooked to a Microsoft Messaging Queue (MSMQ)). IDTD application will communicate with the provided web service as per their contracts (XML Schema definitions) to push and pull data into the HCODS data store.</p> <p>As per this initiative the following needs to happen:</p> <ol style="list-style-type: none"> <li>1. Any appointment data created at the origination system such as IDTD needs to be stored in the HCODS database.</li> <li>2. Any appointment data deleted at the origination system such as IDTD needs to be deleted from the HCODS database as well.</li> </ol>

BR	Sub BR	Business Requirements
		<p>3. Changes in the appointment data such as rescheduling or suspension should also be communicated to HCODS database.</p>
BR-25		<p>The purpose of this requirement is to add convenience to the business requirement detailed in BR-01. It would be nice to have the capability to arrange the columns in the search open appointments results grid. So each user can define his view of the grid and the system should retain the settings defined by the user whenever the user logs into the system.</p>

## Glossary

The following table defines the domain specific terms used in this document.

Term	Definition
7362	A form used by the inmate to request for healthcare treatment services.
BWX/PA	Intraoral Film (Bite Wing/Periapical) – C0200
CDCR #	California Department of Corrections and Rehabilitation unique identifier for an inmate patient.
DD	Developmentally Disabled also known as DDP
DPW	Full time wheelchair user
DPO	Intermittent wheelchair user
DPM	Permanent mobility impairment
DNM	Permanent mobility impairment not impacting housing placement
DPH	Permanent deaf/hearing impairment
DNH	Permanent deaf/hearing impairment, not impacting housing placement.
DPV	Permanent blind/ vision impaired
DPS	Permanent speech impaired.
DNS	Permanent speech impaired, not impacting housing placement.
DDEF	Daily dental encounter form
DPC	Dental Priority Classification – a code that determines the dental treatment priority.
Ducat	A pass required by the custody officer to escort the inmate to fulfill the request for service.
EPRD	Earliest Possible Release Date
FLD	Full Lower Denture
FMX	Full Mouth X-Ray Intraoral Series – D0210
FUD	Full Upper Denture
IDTD	Interim Dental Tracking Database
LD	Educational Learning Disability
ML	Mainline
PANO	Panoramic Film – D0330
PLD	Partial Lower Denture
PUD	Partial Upper Denture
RC	Reception Center
RN	Registered Nurse
TABE	Educational Reading Grade Level
UHR	Unit Health Record

## Appendix A – Existing IDTD application

The following screenshot shows the existing MS Access application and this section aims to list all the functionality that is currently provided by this application.

**MAIN MENU**

Version Date: 12/15/2011

Quit

**Central California Women's Facility**

**Dental Data**

NOTE: Pressing the **F7 key** will bring up the **Ducating Request Form** from anywhere in the program.

**View/Print REPORTS**

**View User's Reference**

**View Inmates in SOMS Download**

**Recommended to Preview Daily: EPRD Ineligibles**

**Send Monthly Data to HQ**

**Send Weekly Data to HQ**

Click this button every Monday

Users In the Program Before the Download is Done

User Name
*

**Search Open Records**

**Search Completed Records**

**Process New Arrivals**

**Open Prosthetics Log**

**Open Specialty Referrals**

**Open Exam Notices**

**Open Consultation Log**

**Open Dental Holds**

**Chart Pulls-Peer Reviews**

**Chart Pulls-DAR Reviews**

**Add/Edit Clinics, Providers, Ducat Requestors, UHR Reviewers, Programs, Non-DDPS Housing, and Housing Setup**

**Add/Edit Comp/Periodic Exam Dates/ Plaque Indices/ Chronic Conditions, and Print Current DPC Chrono, View Inmate PROFILES**

**Add/Edit Disability & Effective Comm. / Reasonable Accommm. Data and View TABE**

**Add/Edit Latest BWX, FMX, and Pano Dates**

**Download SOMS & ARDTS**

SOMS Last Download Date: 12/19/2011  
ARDTS Last Download Date: 12/19/2011

**Allow Editing of Path and or File Name for Server, SOMS, and ARDTS**

Entire Server Path And Back End Name:  
\\accounts\hcs\ccwf\databases\DBDentalTracking\DentalTrackingBack.mdb

SOMS Download Path: \\insc\file002\CCWF-User-Data-Files\CCWF-Public\DDPS DATA) SOMS Download File Name: downinfo.txt

ARDTS Download Path: \\insc\file002\CCWF-User-Data-Files\CCWF-Public\DDPS DATA) ARDTS Download File Name: dentepd.txt

**HIPAA Privacy Disclaimer:**  
This database contains sensitive Health Care information that should not be shared with those who do not have a Health Care need

Select a User Type Before Updating

Institutional HPS

Other Inst User

Regional or HQ User

Between: 9:15 AM And: 10:45 AM

**Times Allowed for Inst HPS I to do Version and TABE Scores Updates**

**Update the Version of This Program**

**Update the Version of User's Reference**

**Update Weekly TABE Scores**

**Link to a COPY of another Inst's back end data (Reg/HQ user only)**

The sections below describe the functionality provided by the main form of the application.

### Search Open Records

ApptID: \_\_\_\_\_

Last Name: \_\_\_\_\_

CDCR #: \_\_\_\_\_

From Appointment Date: \_\_\_\_\_

Through Appointment Date: \_\_\_\_\_

Location of Services: \_\_\_\_\_

Appointment Type: \_\_\_\_\_

Provider: \_\_\_\_\_

DPC Before: \_\_\_\_\_

**Search Records**

**Clear Search (F10)**

**Print Screen**

**Open Current Record (F9)**

**Add New Record**

**Add New Record - I/M Not**

**Open Appointments**

**Go to Closed Appointments**

**Create/View Ducat Lists**

**Bundle Records**

**Review Suspended Appts**

**Specialty Referrals-RFS**

**Consultation Log**

**Return to Main Menu**

**Go to REPORTS**

**Show Patient**

**Dental Holds** **Exam Notices** **Prosthetics Log** **Camper Log** **Program Appts Log**

Show Records Sorted by:  Last Name, First  CDCR #  Location  Sched By Date, Location  TIC Date\*  Appt Date\*  Appt Reason  Provider  Program Appt Reason

\*Blank dates are below

ApptID	Bundled With	Last Name	First Name	CDCRNo	Type of Appointment	Appt Reason	Location	Sched By Date	Tic Date	Ac
79538		JAMES	CHRISTINA	X12777	Transfer In-DPC 1 or 2	Triage And Treatment	B Dental	12/14/2011	12/1/2011	
83484		HADFIELD	CANDACE	WE0360	Services Not Requiring a DF	Interim Prosth Appt	C Dental	12/14/2011	1/6/2012	
79639	80213	LEWIS	LENESHA	W82934	Transfer In-DPC 1 or 2	Triage And Treatment	C Dental	12/14/2011	12/1/2011	
83719		TRUONG	MY	WA0206	7362 Triage	Face To Face Triage	B Dental	12/15/2011		
83768	81184	CLINARD	TAMERA	X14659	7362 Triage	Face To Face Triage	C Dental	12/15/2011	12/15/2011	

This form performs the following tasks:

- Allows the user to search for open appointments by providing values for the following search filters:
  - a. Appointment ID
  - b. Last Name
  - c. CDCR#
  - d. From Date
  - e. To Date
  - f. Location of Services
  - g. Appointment Type
  - h. Provider
  - i. DPC Before
- Allows the user to add a new appointment in the system for a given inmate record.
- Allows the user to print a hard copy of the daily dental encounter and dental priority classification chrono forms.
- Allows the user to view a patient's history in the form of a report once a patient record is available in search results.

**Notes about Command Buttons:**

- **Search Records** – Without giving any search criteria value, brings in all the records available in the system that have an open appointment status.
- **Clear Search** – Allows the user to clear the search results.
- **Print Screen** – Allows the user to print the form along with the search results.
- **Open Current Record** – Once the search results are available, the user can open the current record and see patient information, 7362 information, procedure information and reschedule or suspend information.
- **Add New Record** – allows the end user to add a new appointment record for a given inmate record. This will allow the user to add records that are only in DDPS.
- **Add New Records (I/M not in DDPS)** – Allows the end user to add a new patient and appointment record that are not present in the DDPS download.
- **Dental Holds** – Allows the user to see the dental holds on an inmate. Once the user is on the Dental Holds form, he can also add a new dental hold.
- **Exam Notices** – Allows the user to view the records of inmates to whom dental exam eligibility notices have been sent. Further once the user is on the exam notices form he can print a blank notice, print notices for a given record (notices that were sent).
- **Prosthetics Log** – Allows the user view the log of prosthetic services provided to an inmate. The user can search records based on an inmate name or CDCR# number.
- **Camper Log** – Allows the user to view the log of campers. Campers are inmates from a different institution. The user can search for a specific CDCR# number to view the camper record.
- **Program Appointments Log** – Allows the user to view the program appointments log. The user can search for records based on the CDCR# or by inmate names.

- **Create/View Ducat Lists** – Allows the user to create a new ducat list or view an existing ducat list.
- **Review Suspended Appointments** – Allows the user to view the list of appointments that have been suspended.
- **Specialty Referrals – RFS** – Allows the user to view the list of specialty referral as well as add a new referral.
- **Consultation Log** – Allows the user to view the consultation log. An entry is made in this log if an inmate has been referred for further consultation for example a patient refused extraction of a wisdom tooth, has a high blood sugar level etc.
- **Bundle Record** – Provides access to a bundling form that allows the user to bundle together multiple appointments for a given inmate.
- **Go to Reports** – Takes the user to the reports form that displays the list of available reports that can be printed out of the system.
- **Return to Main Menu** – Takes the user back to the main form.

### Search Completed Records

ApptID	Bundled Y	Last Name	First Name	CDCR N	Location	Type of Appointment	Sched By D:	Appt Date	Appt Reason	Appt Dentist	Not Comp
73631		MENDEZ	SHEILA	WA1015	A Dental	Provider Requested	7/8/2012	7/8/2012	Prophy	Kedaba	Transferre
68858		ESCOBEDO	ELIZABETH	WA5487	D Dental	7362 Treatment	4/4/2012	4/4/2012	Filling(s)	Nazareno	Paroled or
67123		NARITA	KAREN	W21233	C Dental	7362 Treatment	3/21/2012	3/21/2012	Filling(s)	Grieco	Paroled or
63620		BECK	AMY	WA5509	C Dental	7362 Treatment	1/31/2012	1/31/2012	Prophy	Hyqienist	Paroled or

This form performs the following tasks:

1. Allows the user to search for completed appointments by providing values for the following search filters:
  - a. Appointment ID
  - b. Last Name
  - c. CDCR#
  - d. From Date
  - e. To Date
  - f. Location of Services
  - g. Appointment Type
  - h. Provider
  - i. DPC Before
2. Allows the user to navigate to open appointments.
3. Allows the user to view and print California out of state correctional facility (COCF) dental chronos.

- Allows the user to view a patient’s history in the form of a report once a patient record is available in search results.

**Notes about Command Buttons:**

- **Search Records** – Without giving any search criteria value, brings in all the records available in the system that have an open appointment status.
- **Clear Search** – Allows the user to clear the search results.
- **Print Screen** – Allows the user to print the form along with the search results.
- **Open Current Record** – Once the search results are available, the user can open the current record and see patient information, 7362 information, procedure information and reschedule or suspend information. **If the user is viewing a completed appointment record, he can send it back to the open appointments by clicking on the button “Send Back to Open Appointments”.**
- **Go to Reports** – Takes the user to the reports form that displays the list of available reports that can be printed out of the system.
- **Return to Main Menu** – Takes the user back to the main form.
- **Print COCF chronos** – Allows the user to view and print COCF dental chromos.
- **Show Patient History** – Allows the user to view a patient’s history in the form of a report once a patient record is available in search results.

**Process New Arrivals**

This form performs the following tasks:

- Allows the user to view the list of new arrivals.
- Allows the user to print a list of new arrivals returning within 45 days of their departure date.
- Allows the user to print a list of new arrivals sorted by CDCR#, Name, Arrival Into, Arrival From and Arrival Date.
- Also shows the list of institutions along with their acronyms.
- It also allows the user to open data entry forms for new arrivals into mainline – UHR reviews and new arrivals into reception center – dental screenings.

## Open Prosthetics Log

**DENTAL CLINIC PROSTHETICS LOG**

Open Prosth Case-I/Ms Not at the Inst

Show Open Only (no disposition)    Sort By    Add a New Record    To Complete a Record: click on a record showing below and press the F4 key.    Show All for a CDCR #    Print a Prosthetics Report

Show Open & Closed    CDCR #    Last Activity Date    OR    Show All for a Name    Print 128-C Chrono 'Appliance Delivered to Inmate'

Last Name, First    Dentist

Log	CDCR	Last Name	First Name	Housing	Camp	Dentist	FUD	FLD	PUD	PLD	Night Guard	Repair	Reline	Last Activity
826	X06603	CARRANZA	MARGARET	C 509 1-018003L		Bradshaw	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/5/2011
780	X36162	GONZALEZ	PERLA	D 514 1-026004U		Bradshaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/8/2011
772	X13924	DELGADO	VICTORIA	C 509 1-006004L		Bradshaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/29/2011
773	W24213	HARRIS	MATTIE	C 512 1-008002L		Bradshaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/8/2011
678	WA4432	MARTINEZ	ESTELLE	D 515 1-019004U		Bradshaw	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/4/2011
814	X28415	EATON	ROSA	D 514 1-019001U		Bradshaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/2/2011
819	WE1033	BEARD	RACHEL	D 516 1-019001L		Bradshaw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/30/2011

This form performs the following tasks:

1. Allows the user to view the list of records for inmates where prosthetics have been administered.
2. Allows the user open the prosthetic case for an inmate not at the institution.
3. Allows the user to print a prosthetics report.
4. Allows the user to print a 128-C Chrono – appliance delivered to inmate form.

## Open Specialty Referrals

**SPECIALTY REFERRALS-Request for Service (RFS)**

Show Open Referrals Only    Sort By    Add a New Referral    To Review/Edit a record, click on the record and press the key.    Show All for a CDCR #    Print Oral Surgery Log (enter dates below)    Print Unscheduled Referrals

Show Open & Closed Referrals    CDCR #    Referral Date    OR    Show All for a Name    Print Closed Referrals (enter dates below)    Open Spec Svcs Audits

I/M Name    Referring Dentist    From Date    Through Date    Open DAR Reviews

Tx Date    Housing (Current)    \*Blank Housing means I/M is no longer at the Inst.

CDCR #	I/M Name	Housing	Referral Dt	Referring DC	Requested Svc	Priority	RFS Notes	RFS Disp. Dt	RFS Disp.	Specialist	Service Loc
N13912	DELACRUZ, M	A BD1 1-0		Millard	Consultation	Routine					
WE2831	ESKRIDGE, E	B 506 1-00	10/25/2011	Buckendahl	Extraction	Routine		11/29/2011	Approved	Kuo	
WA7878	PARKER, C	C 512 1-02	10/27/2011	Portales	Extraction	Routine		11/29/2011	Approved	Kuo	
WE2159	CHAVEZ, G	D 516 1-02	10/27/2011	Nazareno	Extraction	Routine	Avutene and Surg	12/1/2011	Approved	Kuo	
WE1458	BUCHANAN, A	C 509 1-02	11/1/2011	Portales	Extraction	Routine		11/29/2011	Approved	Kuo	
WE0843	SLOAN, K	C 510 1-00	11/1/2011	Portales	Extraction	Routine		11/29/2011	Approved	Kuo	
WE2492	CHANDLER, R	B 506 1-00	11/1/2011	Grieco	Extraction	Routine		11/29/2011	Approved	Kuo	

This form performs the following tasks:

1. Allows the user to view the list of records for inmates where prosthetics have been administered.
2. Allows the user to add a new referral.
3. Allows the user to print an oral surgery log.
4. Allows the user to print closed referrals based on a date range.
5. Allows the user to print unscheduled referrals.
6. Allows the user to view the audit information for specialty referrals. Once the user is on this form he can do the following:
  - a. Print dental specialty audit.
  - b. Print UHR request list.
  - c. Print UHR outslips.
7. Allows the user to open the DAR review logs.

## Open Exam Notices

**EXAM NOTICES** [Exam Request Reports](#)

SHOW RECORDS (ML Only, excluding 'Temporarily Unavailable' Dental Clinic)

Sort By 1st: Notice Due Dt  
Sort By 2nd: [Dropdown]  
Sort By 3rd: [Dropdown]

Show/Find an Inmate: [Dropdown]

!!!You will need to coordinate with the other yards when you want to print out the notices for the inmates in your yard. The print notice process has to be done at a separate time for each yard.

[Print a Blank Notice](#) [Print Notices \(for records checked below\)](#)

7362s Rec'd

Birthdat	ET	EPRD D	Housing	MLor	Dental Clinic	Chronic	Last Exam	Last Notice	Notice Due	Reason	Print	7362 Rec'd
9/8/1967	WHI		D 514 1-005002U	ML	D Dental		No				<input type="checkbox"/>	
1/9/1987	HIS		B 507 1-029001U	ML	B Dental		No				<input type="checkbox"/>	
4/10/1985	VIE		S INF 1-071001L	ML	B Dental		No				<input type="checkbox"/>	
10/5/1968	WHI		B 507 1-002002U	ML	B Dental		No				<input type="checkbox"/>	
10/16/1979	WHI		A 504 2-218001L	ML	A Dental		No				<input type="checkbox"/>	

This form performs the following tasks:

1. Allows the user to view the list of inmates to whom dental exam notices have been sent.
2. Allows the user to print a blank notice.
3. Allows the user to print notices for the selected records.

## Open Consultation Logs

**DENTAL CONSULTATION LOG** [Print All Open Consults](#) [Print Closed Consults \(enter dates below\)](#)

Show Open Consults Only  Show Open & Closed

Sort By: CDCR #, Last Name, First, Consult Description, Dentist

To Complete a Record: click on a record showing below and press the **F4** key. [Add a New Record](#)

Show All for a CDCR #: [Dropdown] Open Consults-/Me Not at the Inst

From Date: [Dropdown] Through Date: [Dropdown]

Due in 14 business days, Due in 7 business days, Due in 3 bus. days, Re-Calculate Overdues (pinks)

Log	CDCR	Last Name	First Name	Housing	Dentist	Consult Description	Request/Refer Dt	Recd From Lab	Reviewed Dt	Consult Dt
165	N13380	BELL	MICHON	B 505 1-024003L		Biopsy				
167	N14275	GALANDA	SHEENA	A 501 1-016003U	Hanson	Other	1/18/2012	1/25/2012	2/2/2012	2/3/2012
164	W22007	HERNANDEZ	MARJORIE	B 505 1-016002L	Mauricio	Refer For Consultation	12/15/2011			
162	W89724	FINLEY	TERRI	B 505 1-030002U	Kadaba	Refer For Consultation	12/5/2011			
159	WA7621	WADE	BARBARA	C 509 1-027004L	Stevens	Refer For Consultation	11/30/2011			

This form performs the following tasks:

1. Allows the user to view the consultation log. An entry is made in this log if an inmate has been referred for further consultation for example a patient refused extraction of a wisdom tooth, has a high blood sugar level etc.
2. The user can add a new record to the existing consultation log.
3. The user can print all open and closed dental consultations based on a date range.
4. Allows the user to open consultation record for inmates that are not in the institution also. Necessarily means inmates not in DDPS record download.
5. The user can also calculate the overdue consultations.

## Open Dental Holds

**DENTAL HOLDS** [Print Placement Chrono \(click on a record first\)](#) [Print Removal Chrono \(click on a record first\)](#) [Print List of All Open Dental Holds](#)

Show All Holds Records  Show Open Holds Only  [Add New Hold](#)

CDCRN	Last Name	First Name	Current Housing	Date Hold Pla	DDS Placing	Reason For Hc	DP	SD Approval	Hold Notes	Date Hold Rr	DDS Rmng
N131/2	KNIGHT	ANITA	B 505 1-022003L	2/16/2012	Gossett, Cecilia	The I-P is awaiting	1a	2/13/2012	placed hold	2/17/2012	Gossett, Cecilia

This form performs the following tasks:

1. Allows the user to view the list of all the dental holds and open dental holds also.
2. Allows the user to add a new record for the dental hold.

3. Allows the user to print a placement chrono form.
4. Allows the user to print a removal chrono.

### Chart Pulls – Peer Reviews

## CHART PULLS FOR PEER REVIEWS

Clinician Being Reviewed  
Bradshaw, Carol, DDS

Select Records less than or equal to one (1) year since the Provider's last date of service. OR Select records for a specific time period and Appt Reason --->

Select a Case  
Exam and Dx: [ ] Initial Comp Exam: [D0150]

Show Records that meet the Criteria

To add a record to the Chart Pull list, click anywhere on a record below and then click -->

Add Record To Chart Pull List

Print Chart Pull List

Clear Chart Pull List

Print UHR Request List

(Optional) Print UHR Outslips

Location where the UHRs will be sent

Date that UHRs will be needed

Print 237-C-1

Adj 237s data Up/Down: [0]

Adj 237s data Left/Right: [0]

ApptID	CDCR#	I/P Name	D.O.B.	EPRD Dt	ETH	Encounter Lt	Appt Date	Provider	Appt Reason	Proc Code	# Proc
55161	W31321	LEE, RENITA	6/18/1962	8/9/2013	BLA	B Dental	1/18/2011	Bradshaw	Biennial Exam	D0150	1
55624	WA4439	LOPEZ, MARIBEL	1/30/1986		HIS	B Dental	1/24/2011	Bradshaw	Comprehensive E	D0150	1
55625	WA5321	JONES, LYNNETTA	5/5/1963	6/25/2014	BLA	B Dental	1/24/2011	Bradshaw	Comprehensive E	D0150	1
55809	W75777	CONCEPCION, MICHELLE	10/7/1969		MEX	C Dental	1/25/2011	Bradshaw	Biennial Exam	D0150	1
55836	WA4267	ROMERO, ANGELICA	12/12/1976	8/24/2015	HIS	B Dental	1/26/2011	Bradshaw	Comprehensive E	D0150	1

This form performs the following tasks:

1. Allows the user to review the clinician for a specific case.
2. The user can add and clear the chart pull list.
3. The user can print a 237C-1 form.
4. The user can also print the UHR Request list and print UHR outslips.
5. The user can also adjust the 237s data up/down and left/right.

### Chart Pulls – DAR Reviews

## CHART PULLS FOR DAR REVIEWS

To select a record for the Chart Pull, click on the record's 'Select Record'

Add an Inmate to the Chart Pull list who is not showing below.

To view the full contents of a record's 'Dental Necessity' or 'Comments', click in the contents and then hold the SHIFT key and press the F2 key.

Clear All Chart Pull Selected Records

Print Chart Pull List

Print UHR Request List

(Opt) Print UHR Outslips

Date that UHRs will be needed

Location where the UHRs will be sent

Print 237-C-1

Adj 237s data Up/Down: [0]

Adj 237s data Left/Right: [0]

CDCRN#	LName	Referral Da	Referral DC	Service Requeste	Dental Necessi	DAR Review	Comment:	RFS Disposi	Disposition	Select Record
WE3247	ADAMS	11/30/2011	Kadaba	Extraction	#22 retained root w			Approved	12/8/2011	<input type="checkbox"/>
WA9472	ALLO	12/6/2011	Mauricio	Extraction						<input type="checkbox"/>
WE2441	BERRY	12/12/2011	Bradshaw	Extraction						<input type="checkbox"/>
WA4539	BERRY	12/12/2011	Grieco	Extraction						<input type="checkbox"/>
WE1458	BUCHANAN	11/1/2011	Portales	Extraction	Painful, semi erupt			Approved	11/29/2011	<input type="checkbox"/>
WE1132	BUTLER	11/16/2011	Mauricio	Extraction	recurrent pericoron			Approved	11/29/2011	<input type="checkbox"/>

This form performs the similar tasks to the peer review form. These are the reviews done by the dental authorization review committee.

## Reports Form

Types of Reports

Proof of Practice     Dental Treatment Plan

Standard

Validation

Reception Center

Historical (data prior to 9/1/10)

*Reports*

**Print Preview**

\* Select the report to preview and click on the Print Preview

- 128-C Chrono-Inmate Refusal Blank
- 128-D Chrono-Blank
- Appointments Already Scheduled
- Appointments To Be Scheduled-By Clinic
- Appointments To Be Scheduled-By DDS
- Camp Appointment Log - Completed
- Camp Appointment Log - Open

This form allows the user to view/print the following reports:

1. 128-C Chrono-Inmate Refusal Blank
2. 128-D Chrono-Blank
3. 7362 Written Notification
4. Appointments Already Scheduled
5. Appointments Not Completed Detail-By Location
6. Appointments Not Completed Detail-By Reason
7. Appointments To Be Scheduled-By Clinic
8. Appointments To Be Scheduled-By DDS
9. Audit UHR for 7362 Triage
10. Audit UHR for Eff Comm and Reas Accomm (excl TABE)
11. Audit UHR for Eff Comm and Reas Accomm (incl TABE)
12. Audit UHR for Perio
13. Audit UHR for Refusals
14. Audit UHR For TABE
15. Camp Appointment Log - Completed
16. Camp Appointment Log - Open
17. Camp Appointments To Be Scheduled-By Clinic
18. Camp Appointments To Be Scheduled-By DDS
19. Comp Exams With Null PSR Scores
20. Comp Perio Exam Required But Not Done
21. Court Ordered Timeframes-All DPCs Summary-ClosedAppts
22. Court Ordered Timeframes-All DPCs Summary-ClosedApptsDTP
23. Court Ordered Timeframes-All DPCs Summary-OpenAppts
24. Court Ordered Timeframes-All DPCs Summary-OpenApptsDTP
25. Court Ordered Timeframes-All DPCs-MLorRCInmates
26. Court Ordered Timeframes-All DPCs-MLorRCInmatesDTP
27. Court Ordered Timeframes-All DPCs-TimeframesNotMetBreakdown

28. Court Ordered Timeframes-All DPCs-TimeframesNotMetBreakdownDTP
29. Court Ordered Timeframes-Annual Exams
30. Court Ordered Timeframes-Biennial Exams
31. Court Ordered Timeframes-Birthdate Annual Exams Hist
32. Court Ordered Timeframes-Birthdate Biennial Exams Hist
33. Court Ordered Timeframes-Initial Comp Exams
34. Court Ordered Timeframes-Paper Reviews
35. Court Ordered Timeframes-RC Intakes
36. Court Ordered Timeframes-Transfers In
37. Court Ordered Timeframes-Triages with PRC 1
38. Court Ordered Timeframes-Triages with PRC No FTF
39. Court Ordered Timeframes-Triages with PRC Other
40. Daily Dental Encounter Form-Blank
41. Daily Dental Encounter Form-Blank-Oral Surgery Codes
42. Daily Dental Treatment Appointment Log (DDTAL)
43. DDEF By Dates-By Provider - 2009 Codes Hist
44. DDEF By Dates-By Provider - 2010 Codes
45. DDEF By Dates-By Provider - Oral Surgery Codes
46. DDEF Totals-By Provider - 2009 Codes Hist
47. DDEF Totals-By Provider - 2010 Codes
48. DDEF Totals-By Provider - Oral Surgery Codes
49. DDEF Totals-By Provider Pg2
50. DDEF Totals-Grand Total - 2009 Codes Hist
51. DDEF Totals-Grand Total - 2010 Codes
52. DDEF Totals-Grand Total Pg2
53. Deleted Appointment Records
54. Dental Clinic Changes - Move From
55. DPC Totals-All Providers
56. Exam Notices Sent Versus 7362s Request
57. Ineligible for Appt Due To EPRD-Cancelled
58. Ineligible for Appt Due To EPRD-Open
59. Inmate Refusals
60. Intake Dental UHR Review Log (IDUHRRL)
61. Intake Dental UHR Review Log (IDUHRRL) Hist
62. Interim Dental Clinic Tracking
63. Interim Dental Clinic Tracking-By Provider
64. Open Appts Past Their Sched By Date-By Clinic
65. Open Appts Past Their Sched By Date-By Clinic-DTP
66. Open Appts Past Their Sched By Date-By Provider
67. Open Appts Past Their Sched By Date-By Provider-DTP
68. Patients Coming From Non-Inst Locations
69. Prosthetics Log-Completed-Detailed

70. Prosthetics Log-Completed-Summary
71. Prosthetics Log-Last Activity Dates
72. Prosthetics Log-Not Completed-Detailed
73. Prosthetics Log-Not Completed-Summary
74. Prosthetics Log-Undelivered Devices
75. Provider Procedure Time
76. RC Inmates Length Of Stay
77. RC Inmates That Have Not Had a Screening
78. RC Inmates That Refused Their Screening
79. RC Panorex Timeframes
80. RC Screening Inmates Not At Inst
81. RC Screenings Timeframes
82. RC Screenings-Closed Appts for Arrival Dates
83. RC Screenings-Closed Appts for Screening Dates
84. RC Screenings-Open Appts
85. Request For Dental Treatment Log (RDTL)
86. Rescheduled Appointments Summary
87. Specialty Referrals-Completed Or Closed
88. Specialty Referrals-Oral Surgery Log
89. Specialty Referrals-Unscheduled
90. Suspended Appointments Sorted By Housing
91. Suspended Appointments Sorted By Name
92. Timeframes for Birth Month Appointments Hist
93. Timeframes for Comp Exams in 90 Days Appts
94. Timeframes for RC Screenings in 60 Days
95. Timeframes for Transfer Ins with DPC 1 or 2
96. Timeframes for Transfers-Appointments in 3 Days Hist
97. Timeframes for Transfers-Appointments in 90 Days Hist
98. Timeframes for Treatment Appointments
99. Timeframes for Treatment Appointments-DTP
100. Timeframes for Triage Appointments
101. Timeframes Summary-ClosedAppts
102. Timeframes Summary-ClosedAppts-DTP
103. Timeframes SummaryMLorRC
104. Timeframes SummaryMLorRC-DTP
105. Timeframes Summary-OpenAppts
106. Timeframes Summary-OpenAppts-DTP
107. Transfer-Ins UHR Reviews Compliance
108. Valid 01 - Open Records with Procedures
109. Valid 02 - Open Appointments with Expired Appointment Dates
110. Valid 03 - Open Appts with No Appt Date and No Sch By Date
111. Valid 06 - Open Prosthetics Cases-Inmate Not at Inst

- 112. Valid 07 - Open Specialty Referrals-Inmate Not at Inst
- 113. Valid 08 - Open Consultations-Inmate Not at Inst
- 114. Waiting For Specialist Care
- 115. Weekly Appointments

### Miscellaneous Administrative Forms

These are the forms that allow the user to enter data into the master tables. These forms are available through separate command buttons.

**Add/Edit Clinics, Providers, Ducat Requestors, UHR Reviewers, Programs, Non-DDPS Housing, and Housing Setup**

- 1. Only the user with this role can add or edit clinics, providers, ducat requestors, UHR reviewers and the other functionality available on this form.

**Add/Edit Comp/Periodic Exam Dates/ Plaque Indices/ Chronic Conditions, and Print Current DPC Chrono, View Inmate PROFILES**

- 2. This button allows the user to view inmate profiles only in the current version of the application and they can also print the current dental priority classification (DPC) chrono form for the selected inmate.

**Add/Edit Disability & Effective Comm. / Reasonable Accom. Data and View TABE**

- 3. This button allows the user to view the inmate’s disability and effective communication levels. The user can add a new inmate, view current inmates and print the following reports:
  - a. List of current inmates with effective communication and reasonable accommodation codes for the following:
    - i. Mobility impaired codes only.
    - ii. Developmental disabled codes only.
    - iii. Disability and Effective communication codes only.
    - iv. Learning disability codes only.
  - b. List of current inmates with TABE scores <= 4.0.
  - c. List of current inmates who have been granted extended stay.

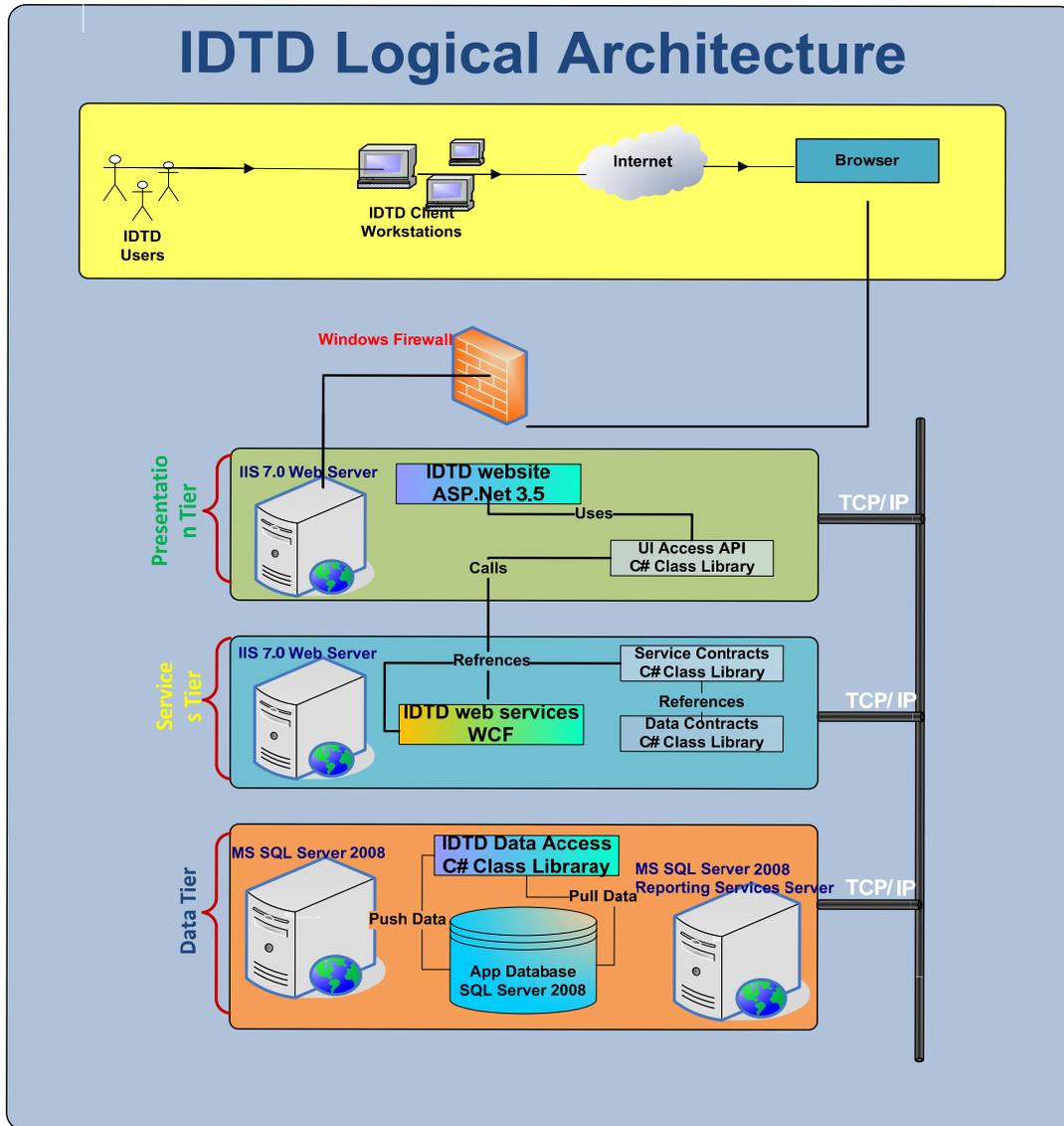
**Add/Edit Latest BWX, FMX, and Pano Dates**

- 4. This button allows the user to view X-Ray details for the inmates. It also allows the user to add a new X-Ray record into the system.

**Recommended to Preview Daily: EPRD Ineligibles**

- 5. This button allows the user to review or cancel appointments due to EPRD. This list excludes the mandatory appointments.

## Appendix B – Conceptual Logical Architecture



### IDTD Logical Architecture

- The new enterprise dental tracking system will be an N-Tier solution with clear separation of user interface, services and data access.
- The user interface tier will house the ASP.Net website and the User Interface API component. The purpose of the UI API is to communicate with the service tier for data extraction, modification and subsequent persistence.
- The services tier will house the WCF web service and its associated data and service contracts. It will also contain the reporting service to communicate with the reporting services database.
- The data access layer consists of a custom data access module that will facilitate interactions with the backend SQL Server database.