



GOVERNMENT OF PUERTO RICO

Department of Health
Medicaid Program

I.4.2.1.ii Completed Medicaid Application - Citizen Portal and I.4.2.p.ii Completed Citizen Mobile App

PREE Project
Government of Puerto Rico

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Document Revision History

Version Number	Date	Description
0.1	06/08/2020	Initial Draft
0.5	06/19/2020	QC Review
0.8	06/29/2020	Initial Draft for Review
0.9	07/10/2020	Updates made per CIM comments
1.0	07/15/2020	Final Draft
1.1	10/08/2020	<p>Following updates made per CR-132:</p> <ul style="list-style-type: none"> ▪ 4.3 Received Documents Online Process ▪ 5.2 Citizen Portal Header ▪ 5.2.2 Sign up ▪ 5.4 Your Account ▪ 5.4.2 Your Benefits ▪ 5.4.4 Your Documents ▪ 5.4.5 Add a Document ▪ 5.6.2 Uploaded Documents ▪ 6.4 Finalizing Linking Process ▪ 7.1.2.1 Online Application Task ▪ 7.1.2.2 Evidence for Verification Task ▪ 10.4 Submitted Documents
1.2	10/19/2020	CR 132 – Final Review
1.3	10/21/2020	CR 132 – Final Submission
1.4	12/22/2020	CR 147- Initial Review – Updates made to the following mockups to reflect the new Race options:
1.5	01/26/2021	<CR 147> Final Submission
1.6	04/16/2021	<p>Initial Draft for Review:</p> <p>Following sections updated made per CR157</p> <ul style="list-style-type: none"> ▪ Figure 10: RIDP Page Flow <CR157>
1.7	04/30/2021	Final Submission for CR 157 – no comments received



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Version Number	Date	Description
1.8	12/29/2021	Initial Draft for Review: <ul style="list-style-type: none">- CR-170 – Non-MAGI Income- PRMO-224: Removal of MFA Functionality- PRMO445 – Make Application More Dynamic- PRMO446 – Reorder Questions & Eliminate unnecessary questions for non-applicants- PRMO448 – Add Verbiage to SSN Question to call the Help Center- PRMO449 – Change ‘Due Date’ to ‘Estimated Delivery Date’- PRMO452 – Immigration Assistance Message(s) Verification
1.9	01/20/2022	Final Submission for CR170, PRMO224, PRMO445, PRMO446, PRMO448, PRMO449 and PRMO452
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More About You

Additional Information

Because Sheila isn't applying for health insurance, you may provide a social security number (SSN) if he/she has one. It's optional. We'll use this SSN to check income. This can speed up the decision about whether household members get help paying for insurance.

5 Social Security Number (SSN): Optional

7 Date of birth:
DD/MM/YYYY

01/01/1995

Gender:

Female

Gender identity: Optional

--Please Select--

What language do you wish to be contacted in? Optional

--Please Select--

43 Are you a police officer of the commonwealth?

--Please Select--

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

--Please Select--

Where You Live

Describe your residency in Puerto Rico.

--Please Select--

Where do you live?

--Please Select--

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

18 Is <Sheila> an American Indian/Alaska Native?

--Please Select--

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Supporting document details

2 I-94 (Arrival/Departure Record) has been selected to be the supporting document for the status of being a Lawful Alien, naturalized citizen or derived citizen. Please provide the below information as available in the document. Please enter the Name and Date of Birth if different from what is already entered in the Application Information.

I-94 Number Optional

SEVIS ID Optional

Document Expiration Date Optional
DD/MM/YYYY

First Name Optional

Middle Name Optional

Last Name Optional

Date of Birth Optional
DD/MM/YYYY

Additional Information

Optional

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Figure 68: Review your Answers (About you) – Applicant <PR-14507>

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Review your Answers

Here is a summary of what you have told us about your situation. If you would like to change your answers click 'Change'!

Name

First name: Sheila	5 Middle name: --	Last name: Coswell	Change
7 Second last name: --			

Addresses

Street 1: 8899 Main Street	Street 2: --	City: PUERTA DE TIERRA	Change
State: Puerto Rico	Zip: 00906	91 Neighborhood: Cupey	

Is your mailing address the same as your residential address?
Yes

Contact Details

Home phone number:	Work phone number:	Cell phone number:	Change
Other phone number:			

Email

Email address: --	Change
----------------------	------------------------



I.4.2.p.ii Completed Citizen Mobile App

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Personal Details ^

Social Security Number (SSN): 812335162	If you have no SSN, have you applied for one? --	Reason why you don't have a SSN --	Change
Date of birth: 1/1/1995	Marital status: Single	Gender: Female	
What language do you wish to be contacted in? --	Police officer: No	Relative of absent police officer: Not Relative to a Police	
Emancipated by a court order: No	Are you the sponsor of an immigrant? --	Citizenship status: Alien	
Alien status: Cuban/Haitian Entrant	Do you have a sponsor? No	Date of Entry 1/1/2017	
Country/Region of Origin Cuba	Veteran Status: No Service	When did you become a member of the household? 1/1/1995	

Where You Live ^

Describe your residency in Puerto Rico. Permanently residing in Puerto Rico	Where do you live? Home	When did you start living here? 1/1/1995	Change
--	----------------------------	---	------------------------



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Race and Ethnicity ^

<p>Black or African American No 96</p> <p>Hawaiian or Pacific Islander No 98</p> <p>Chinese No 121</p> <p>Korean No 124</p> <p>Native Hawaiian No 127</p> <p>Other Pacific Islander No 130</p> <p>Ethnicity --</p>	<p>American Indian or Alaskan Native -- 96</p> <p>White or Caucasian No</p> <p>Filipino No 122</p> <p>Vietnamese No 125</p> <p>Guamanian or Chamorro No 128</p> <p>Other No</p>	<p>Asian No</p> <p>Asian Indian No 120</p> <p>Japanese No 123</p> <p>Asian Unknown No 128</p> <p>Samoa No 129</p> <p>Decline to Answer Yes</p>
--	---	--

[Change](#)

Figure 69: Review your Answers (About you) – Non-Applicant <PRMO-446>

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Review your Answers

Here is a summary of what you have told us about your situation. If you would like to change your answers click 'Change'.

Name

First name: Sheila
 Middle name: --
 Last name: Coswell
 Change

Second last name: --
 Change

Addresses

Street 1: 8899 Main Street
 Street 2: --
 City: PUERTA DE TIERRA
 State: Puerto Rico
 Zip: 00906
 Neighborhood: Cupey
 Change

Is your mailing address the same as your residential address?
 Yes

Contact Details

Home phone number: Work phone number: Cell phone number: Change
 Other phone number:

Email

Email address: --
 Change

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Vehicle

Your household

Constance
Age 27

Freddie
Age 5

Tell us about Constance, age 27

From the information you have given us Constance has a vehicle, please enter the details below.

Please enter the details of Constance's vehicle below:

This page allows you to enter details about anyone in your home that owns a vehicle. A vehicle is any form of transport that the person owns. Examples of vehicles include cars, vans, motorbikes, etc.

Vehicle Details [Help](#)

Please enter the details of Constance's vehicle below:

5 Vehicle make:

6 Vehicle model:

7 Year of registration:

8 How is the vehicle used?

9 What is the vehicle worth?

10 How much is owed on this vehicle?

11 Does Constance have any other vehicles?

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English

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Figure 110: Summary of Your Resources – Prepopulated Application

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1 Acronyms

Table 1: Acronyms

Acronym	Definition
AABD	Assistance to the Aged, Blind, and Disabled
ADFAN	Administración de Familias y Niños
COC	Change of Circumstances
CMS	Centers for Medicare & Medicaid Services
FAQ	Frequently Asked Questions
FDD	Functional Design Document
FDSH	Federal Data Services Hub
HIPAA	Health Insurance Portability and Accountability Act
IC	Integrated Case
IDP	Identity Proofing
IEG	Intelligence Evidence Gathering
IV&V	Independent Verification and Validation
JAD	Joint Application Design
N/A	Not Applicable
NOD	Notice of Decision
OCM	Operational Change Management
OOTB	Out of the Box
OPM	Oficina de la Procuradora de las Mujeres
PDF	Portable Document Format
PHI	Protected Health Information
PMO	Project Management Office
PRDoH	Puerto Rico Department of Health
PREE	Puerto Rico Eligibility and Enrollment
PRMP	Puerto Rico Medicaid Program
RIDP	Remote Identity Proofing
SI	System Integrator
SSN	Social Security Number
SQL	Structured Query Language
VIBES	Virgin Islands Benefit Eligibility System
URL	Uniform Resource Locator



2 Introduction

2.1 Purpose

The purpose of the Citizen Portal Functional Design Document (FDD) is to present the design components for both the citizen Medicaid application (I.4.2.1.ii) and citizen mobile application (I.4.2.p.ii). The Citizen Portal is a citizen-facing and mobile friendly application that will allow citizens to apply for health benefits, check the status of their application, receive notifications, and upload supporting documents.

2.2 Scope

The Citizen Portal FDD will document all the modifications/additions made to the Out of The Box (OOTB) screens, batches, and tasks that will allow the end to end process of an application to be submitted online, process the application by a caseworker in Puerto Rico Eligibility and Enrollment (PREE), and notify the applicant of the decision. Citizens will be able to apply online, complete remote identity proofing (RIDP), attach supporting documents, view the portable document format (pdf) version of the submitted application, check the status of their applications, and receive notifications related to their user account. The Citizen Portal will require dual-knowledge-factor authentication to log in to the account. The Citizen Portal will be available in English and Spanish. In addition, the portal will be mobile and tablet friendly, providing applicants a citizen-friendly experience when browsing the Citizen Portal via a mobile device or tablet.

With the merge of online change of circumstances (COC) (I.4.2.m.ii) with this FDD, it also includes the following enhancements:

- Accounts for the Puerto Rico Medicaid Program Services Portal (PSPMPR) can be created by a caseworker
- Users can submit a request online to link their case information to their PSPMPR account
- View information about their case information
- Submit an online application prepopulated with data from their case
- Apply for Retroactive Medicaid online
- Report changes online
- Complete renewal form online
- View notices online
- New notices and notifications
- No touch processing of online application



2.3 Not in scope

This design does not include database schemas, Structured Query Language (SQL) queries, Decision Summary Table implications, and other technical details required to fully implement the online intake application process via the Citizen Portal.

Details related to reports, and interfaces. ~~, online notices, online change of circumstances (COC), online renewal, online appeals, online Retroactive Medicaid application, prepopulated intake application, no touch process, and coverage information will be covered in separate FDD's.~~

<PRMO-445> An Online Supplemental Application is not in scope.

2.4 Historical Team Members

Table 2: Team Members <PRMO-445>

Attendees	Organization
Jesús Ayala De León	PRMP
Joenelly Olmo Encarnación	PRMP
Marleen Pérez	PRMP
Raquel Ortega	PRMP
Juan Manzano	PRMP
Camille Gray	PMO
Janeth Merchan	PMO
Vaidehi Padte	PMO
Ivan Galloza	PMO
Jean Beaty	PMO
Blake Hansard	PMO
Christina Lopez	IV&V
Courtney White	SI



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Attendees	Organization
Charlene Worley	SI
John Zientara	SI
Kanika Hughley	SI
Ryon Johnson	SI
Stephanie Nieves	SI
Uma Guruswamy	SI
Margarita Gregorio	OCM
Paul Cohen	OCM
Christy Schilling	BerryDunn
Sarah Abbott	BerryDunn

3 Key Assumptions

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

1. The Caseworker Portal and the Universal Access Responsive Web Application (Citizen Portal) functionality represented within this document are based on Cúram Version 7.0.5 and customizations from other Cúram implementations.
2. The artifacts documented in this FDD serve as a direct input for the development effort. All documented designs have been technically assessed for feasibility; however, there may be instances during the build process where new or conflicting information may force the design to be updated. In these instances, the updated proposed design will be presented to Puerto Rico Medicaid Program (PRMP) for review and approval before any build activity commences.
3. The acronym "OOTB" refers to the base system functionality that is being transferred from a prior implementation. This will be the base system that will be modified to meet PREE requirements.



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4. PRMP recognizes the practicality of accepting this assumption but conditions it on the features not documented within design documents being in compliance with regulations, the Puerto Rico Medicaid State Plan and Puerto Rico public policy.
5. OOTB functionality, which meets the state's needs, will not always be documented in detail unless there is a business or development-related reason to do so.
6. The OOTB Software documentation for Cúram can be obtained at the IBM website.
7. The Virgin Islands Benefit Eligibility System (VIBES) FDDs can be obtained at the PREE SharePoint site.
8. The PREE Glossary document is available on the PREE SharePoint.
9. The mockups provided within each 'Screenshot' section serves as a prototype of what the page might look like, however, these prototypes are subject to change due to the discretion of the development team to meet the requirements listed under the 'Description Modification and Addition' sections.
10. At the conception of the Citizen Portal, no citizen will have an account. Each citizen who desires to have an account will have to create an account from the Sign up page.
11. A 'user' is a person using the Citizen Portal. An 'External User' is a person with a user account on the Citizen Portal. In this FDD, 'citizen' is the term provided by the PREE project to address the people using the Citizen Portal, not the citizenship status of the person. 'Applicant' is a person who is person listed on an application.
12. Prior to linking an External User to a Registered Person, the Registered Person cannot be an active member in more than 1 case. As person moves from cases, caseworker must ensure that person is not an active member on multiple cases.
13. For manual linking, caseworker will complete Identity (ID) Proofing prior to creating the link record on the External User page.
14. Primary Members can view all available information related to their case, including information recorded on their case pertaining to other household members, via their PSPMPR account. They can also report changes on behalf of their case members.
15. Case members can only view available information related to themselves on the case and can report changes for and about themselves.
16. A user or an External User is a person with an account on PSPMPR.
17. A Person is a registered participant of type Person in PREE.



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

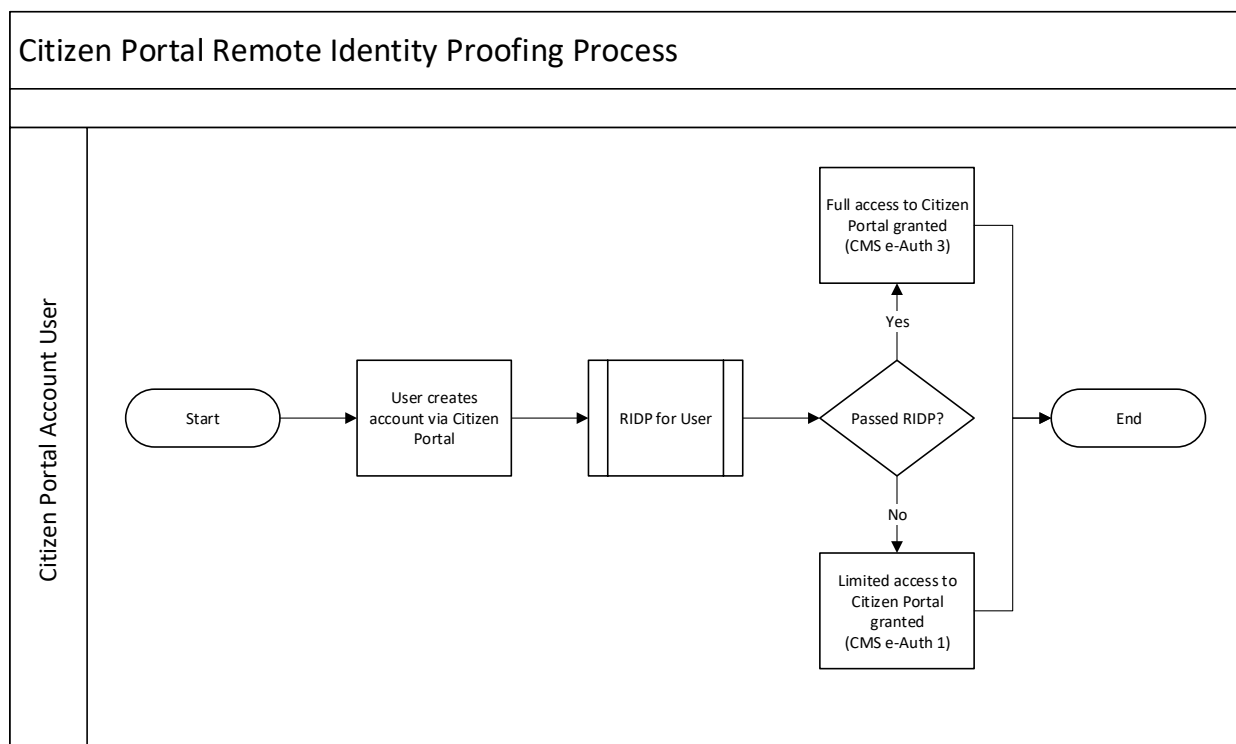
4 Business Processes

The Business Processes section contains high-level overview of business process related to the Citizen Portal, including Centers for Medicare & Medicaid Services (CMS) e-Authentication Level 3 identity proofing (IDP), online application, and online submission of supporting documents process.

4.1 Citizen Portal Remote Identity Proofing Process

This process illustrates a high-level overview of the RIDP process at registration. The purpose of this process is to grant user full access to the Citizen Portal when CMS e-Authentication Level 3 IDP is successfully completed. Citizens who fail RIDP will receive limited access that will not allow them to see supplemental benefit information. The ability to see supplemental information is part of the stabilization phase.

Figure 1: Citizen Portal RIDP Process



4.1.1 Detailed Steps

User creates account via Citizen Portal

Citizens can create a user account via the Citizen Portal.

RIDP for User

After the citizen creates their account, there will be an attempt to remotely verify the identity of the user at a CMS e-Authentication Level 3. See the RIDP Interface Control Document for more information about the RIDP process.

Passed RIDP?

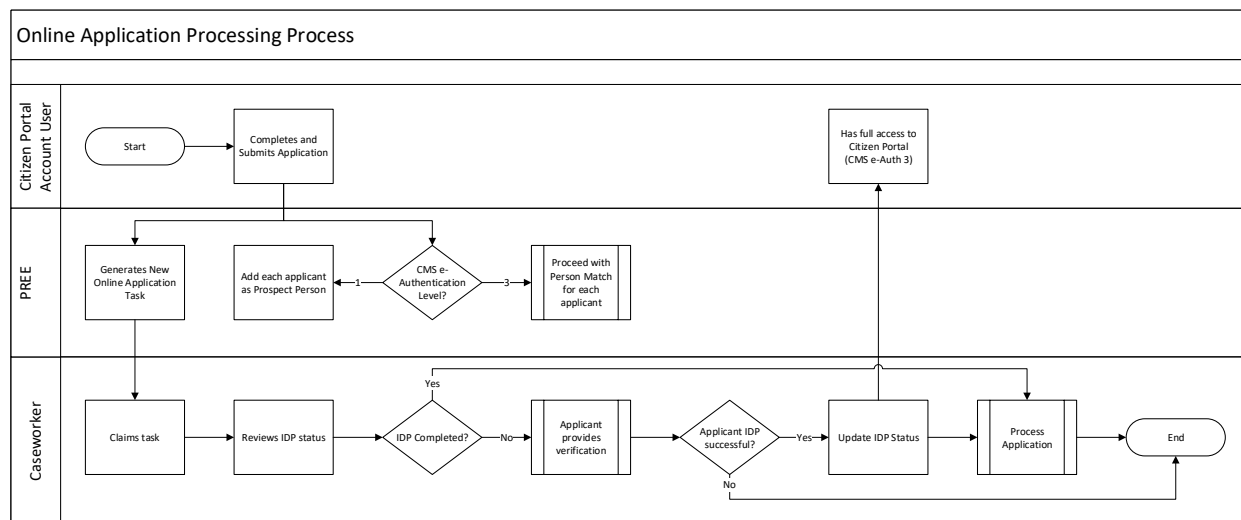
If the user identity was verified, then the user will have full access to the Citizen Portal with the ability to save an application, resume a saved application, view the status of their application(s), upload documents for pending decision application, and view the pdf of submitted application(s).

If the user identity was NOT verified, then the user will have limited access to the Citizen Portal until the user is able to complete CMS e-Authentication Level 3 IDP per PRMP policy. As a limited user, the user will still be able to perform all of the same functions as a user that passed RIDP for R1 but will not be able to see supplemental information during stabilization phase.

4.2 Online Application Processing Process

This process illustrates a high-level overview of an online application process, from when an application is submitted via the Citizen Portal until the application is ready to be processed by a caseworker.

Figure 2: Online Application Processing Process



4.2.1 Detailed Steps

Completes and Submits Application

Citizen Portal users can apply online for the Government Health Plan.

CMS e-Authentication Level?

When an online application is submitted, PREE will validate the user CMS e-Authentication Level. If the user CMS e-Authentication Level is 3, then each



applicant will go through the Person Match process. If the user CMS e-Authentication Level is 1, then each applicant will be added as prospect person. This is to avoid merging information from an application with an existing case prior to a caseworker verifying the identity of the primary applicant.

Generate Online Application Task

When an online application is submitted, PREE will generate the 'Online Application Task'. This task will be routed to the Regional Work Queue or to the Central Office Work Queue.

Claims Task

The caseworker claims the next Online Application Task from the queue. The task will include a link to the application and a link to the External User profile. The Citizen Portal users will be referred as External Users in the Caseworker Portal.

Note: Caseworker should close task once all applicable and possible sets are completed. The application does not need to be disposed to close the task.

Reviews IDP Status

From the External User profile page, caseworker can verify the user IDP status. When the IDP status is verified, then the caseworker can assume that the Primary Applicant and External User are the same person and can proceed with the Application Processing process. When the IDP status is NOT verified, then the caseworker needs to confirm if the user and primary applicant are potentially the same person.

Note: Citizen Portal Users should be applying as the primary applicant; however, until the user passes CMS e-Authentication Level 3 IDP, caseworkers should not assume the user and the primary applicant are the same person.

Applicant provides verification

If IDP is not completed, then the user must provide verification per PRMP policy.

Update IDP Status

If the applicant can verify their identity per PRMP policy, then the caseworker will update the IDP Status on the External User profile.

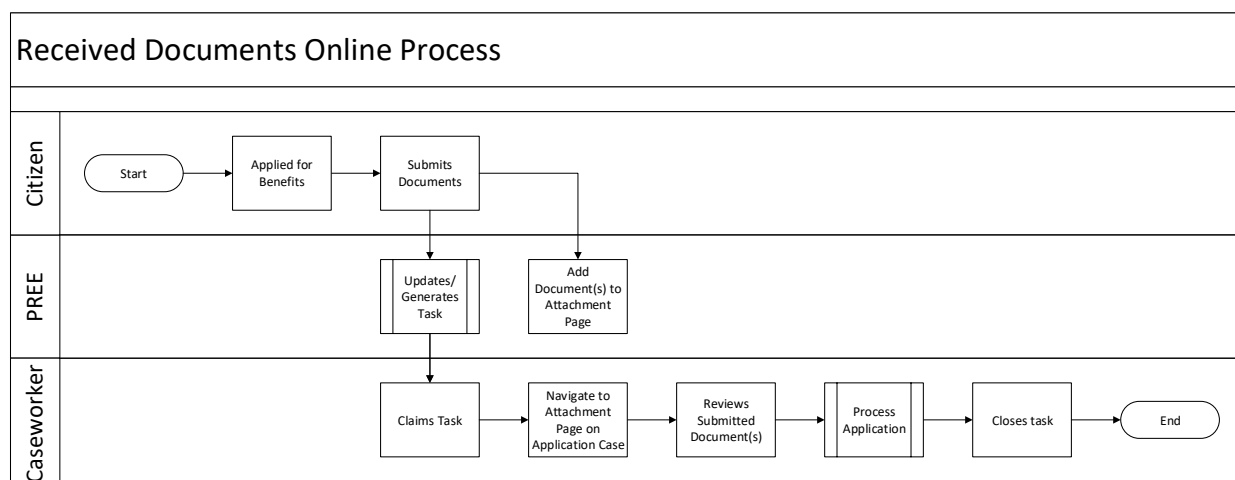
Process Application

Once the identity of the Primary Applicant is verified, the caseworker can proceed with processing the application. Processing an online application is the same as the process outlined in the Intake Application Processing FDD. Once the application is disposed (by worker or by auto denial batch), a Notice of Decision (NOD) is sent by mail.

4.3 <CR-132>Received Documents Online Process

This process illustrates a high-level overview of reviewing documents received from the Citizen Portal.

Figure 3: Received Documents Online Process



4.3.1 Detailed Steps

Applied for Benefits

Citizens can submit supporting documents after their application is submitted.

Submits Document(s)

Citizens can submit document(s) for an application with a 'Pending Decision' status. All submitted document(s) will be available on the ~~Application~~ Attachment Uploaded Documents page.

~~Generates/Updates~~ Task

Each submitted application will trigger the '~~Online Application~~ Evidence for Verification Task' to be generated. Upon the submission of the document(s), the system checks if this task is still open and not assigned to a caseworker. If so, the '~~Online Application Task~~' will be updated to include a comment about the submitted



~~documents. If the task was already claimed, the 'Documents Received Online Task' will be generated.~~

Claims Task

The caseworker claims the next ~~'Online Application Evidence for Verification Task' with document snippet or 'Documents Received Online Task'~~ from the queue. The task will include a link to the ~~application~~ case so the caseworker can begin reviewing the submitted documents.

Review Submitted Document(s)

Caseworker will navigate to the Uploaded Documents ~~Attachment~~ page within the Application. From this page, each submitted document will contain a link to view the document. Caseworker will review each document listed and determine if it is an acceptable verification document. If so, caseworker can accept the document and a verification record is created. ~~will then navigate to the corresponding evidence and set it to verified.~~

Process Application

Once each document has been reviewed, the worker is responsible for taking the appropriate action on that application. Processing an online application is the same as the process outlined in the Intake Application Processing FDD.

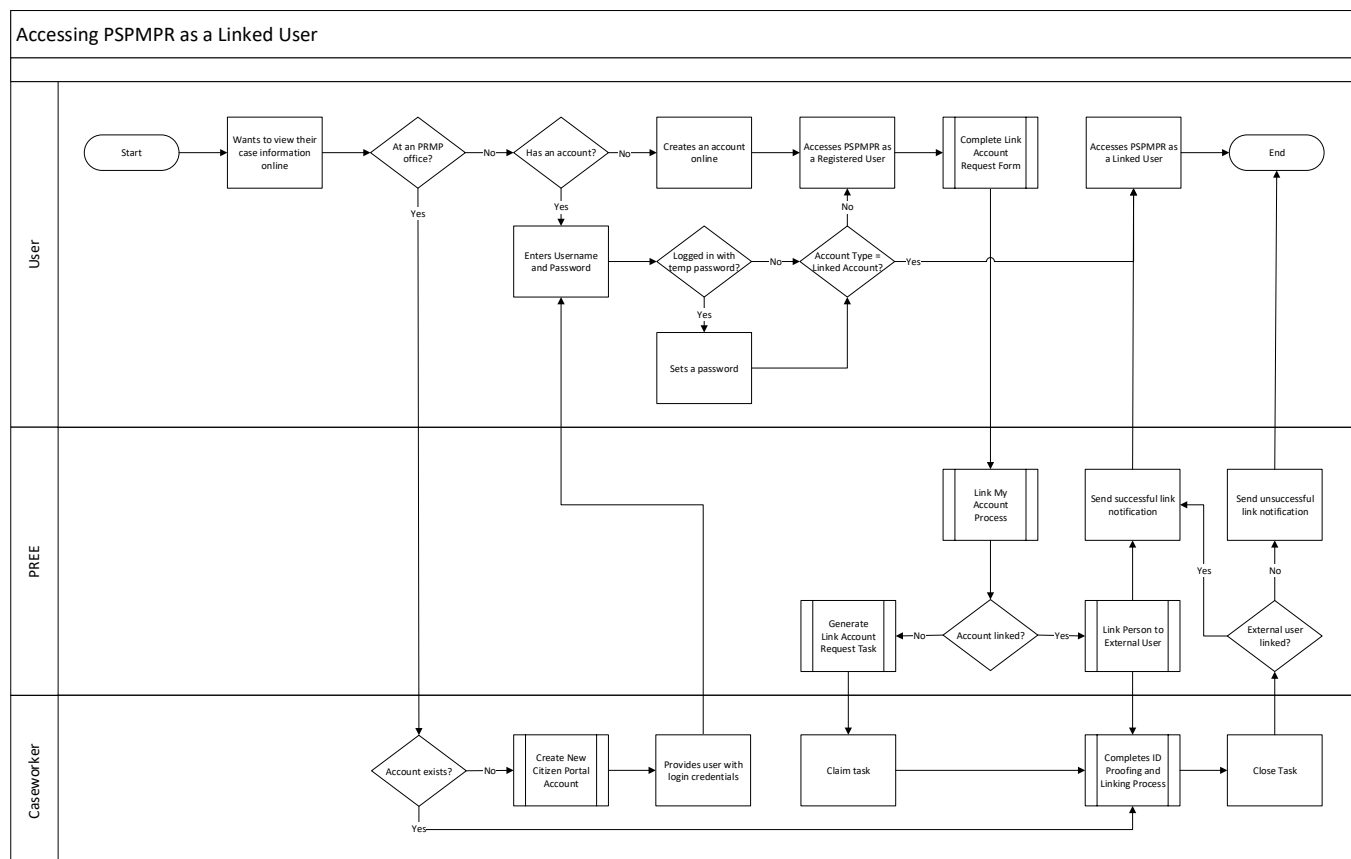
Closed Task

Once the caseworker reviewed all the submitted documents, the caseworker will close the task.

4.4 Accessing PSPMPR as a Linked User Business Process

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

Figure 4: Accessing PSPMPR as a Linked User



4.4.1 Detailed Description

User wants to view their case information online

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

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

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

1. If user already has an account, login. Else, user must create an account to login.
2. Once logged in, the 'Link my account' card will appear on the dashboard. Note that the card will disappear once a request was submitted, or the account is linked using an alternative method.
3. Click on the 'Link my account' card and complete the form.



4. Once submitted, PREE will attempt to systematically link the account. If successful, then user will receive the 'Your Account Has Been Linked' notification to inform them that their request was successful. Else, a task will be generated for the caseworker to manually complete the process.
5. When a caseworker claims the task, they can complete the manual linking process as described in Citizen Portal FDD.
6. Once the caseworker has taken all the appropriate steps to attempt to complete the link request, they close the task. Note that when the task is closed, PREE will check if the External User was linked with a Person. If so, then the "Your Account Has Been Linked" notification will be sent. Else, the 'Unsuccessful Link My Account Request' notification will be sent.

User is being assisted by a caseworker

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

7. Caseworker will determine if the user already has an account. If not, a new account can be created from the Person profile page. Upon completion, caseworker will printout a notice with their username and temporary password.
8. Once the user account is created (by a caseworker or previously by the user), then the caseworker can proceed with the manual linking process as described in Citizen Portal FDD.

5 Screen Modifications

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

5.1 Citizen Portal Home Page

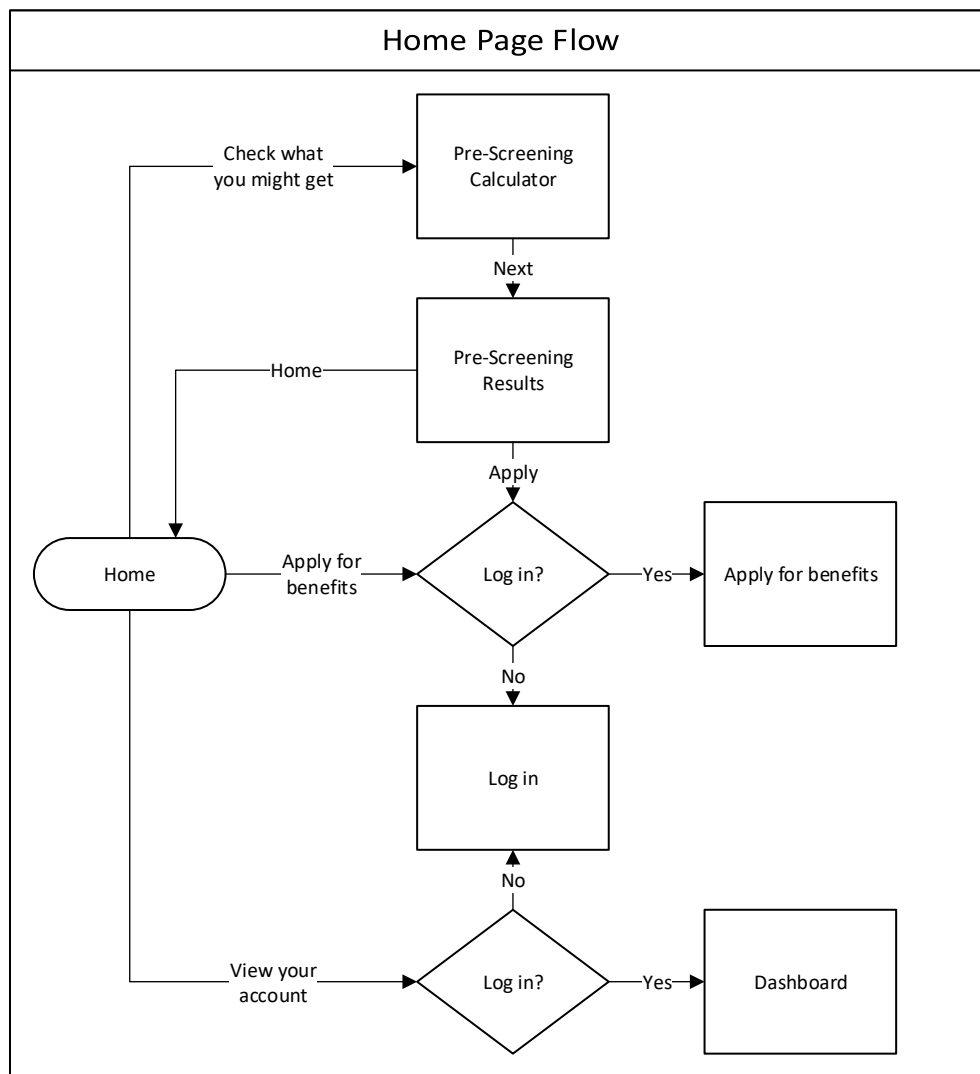
When the citizen navigates to the Citizen Portal, they will land on the home page. The body of the home page is made up of the following 3 cards:

- Check what you might get
- Apply for benefits
- View your account



This section contains the details about the modifications made to the body of the 'Home' page and the pre-screening processing when 'Check what you might get' is clicked.

Figure 5: Home Page Flow



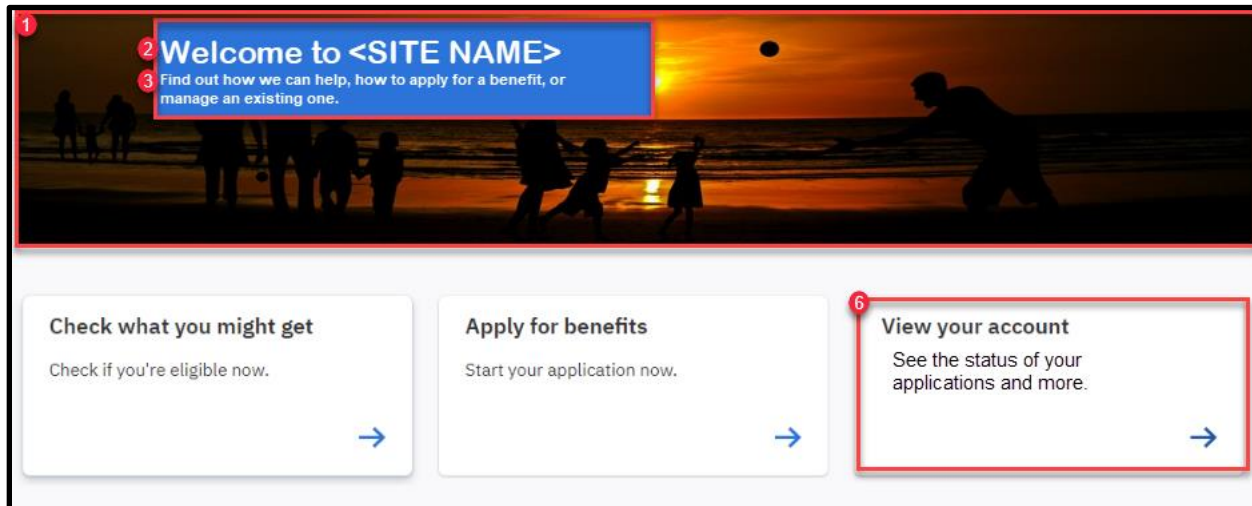
5.1.1 Home

The Home section contains a mockup of the Citizen Portal home page. On this public page, citizens will have the ability to check what they might be eligible for, apply for benefits, and view their account.



5.1.1.1 Screenshot (Modify)

Figure 6: Home Page



5.1.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx HomeSignupLoginYourAccount.xlsx</p>	Homepage

5.1.2 Pre-Screening Calculator

The 'Pre-Screening Calculator' page will ask citizens to provide basic information about their home. The entered data will be used to determine if the household may be eligible for benefits.



5.1.2.1 Screenshot (Modify)

Figure 7: Pre-Screening Calculator

5.1.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>HomeSignupLoginYourAccount.xlsx</p>	Pre-Screening

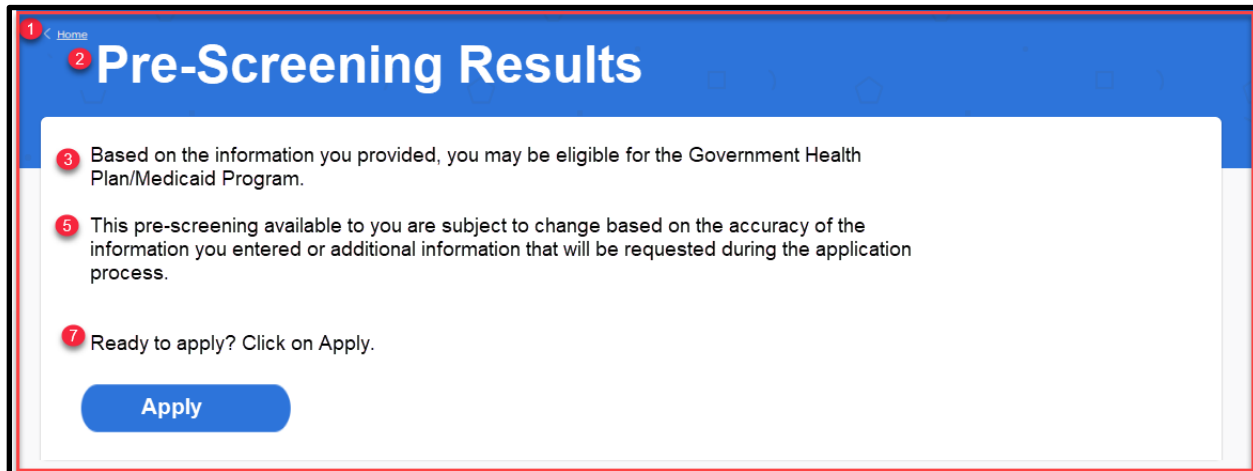
5.1.3 Pre-Screening Results

The 'Pre-Screening Results' page will display the results of the Pre-Screening Calculator. The citizen can see if the household may be eligible for benefits. However, a full application must be submitted to determine if a person is truly eligible for benefits.



5.1.3.1 Screenshot (Modify)

Figure 8: Pre-Screening Results



5.1.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx HomeSignupLoginYourAccount.xlsx	Pre-Screening Results

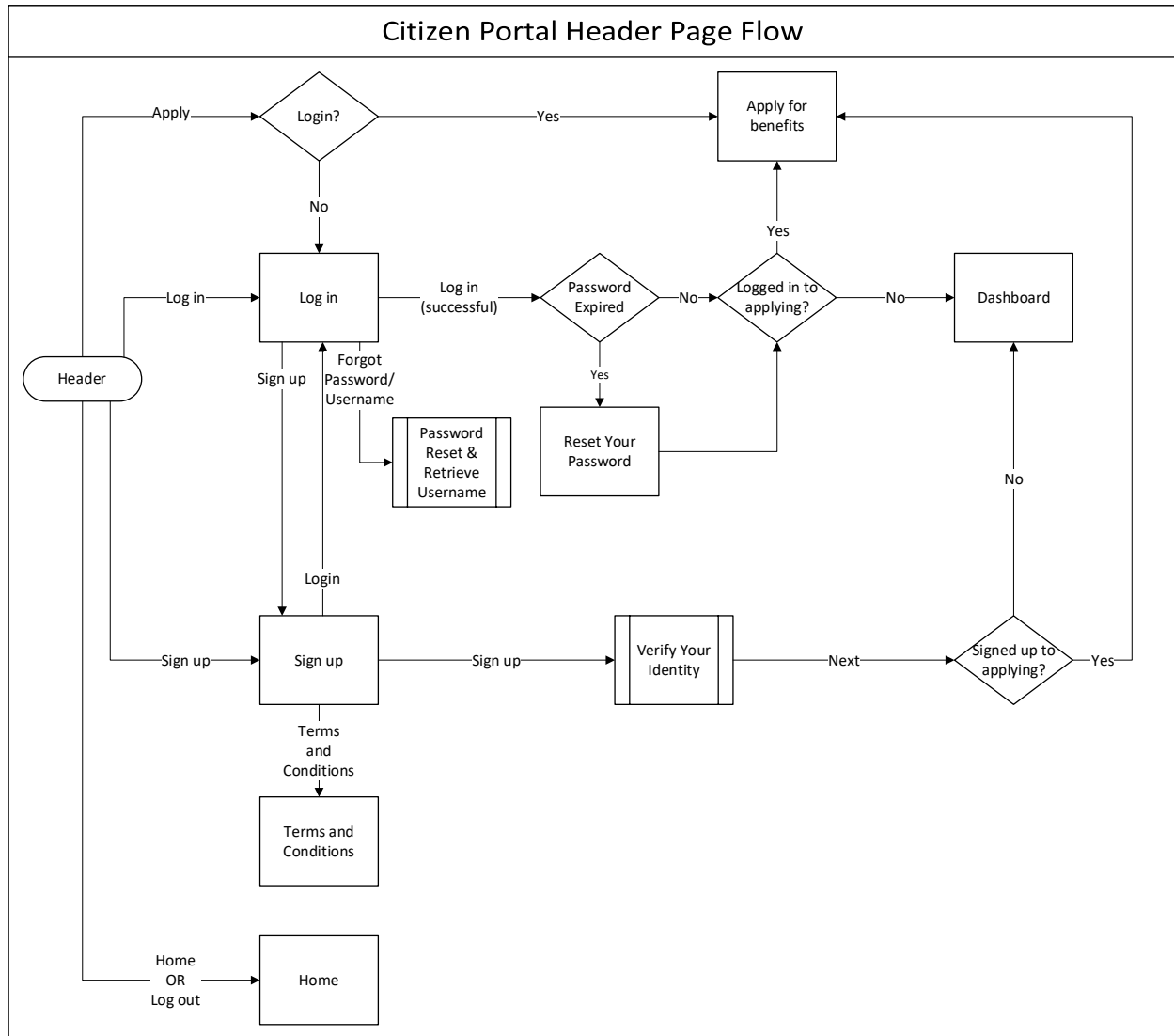
5.2 (Online COC) <CR-132> Citizen Portal Header

The Citizen Portal Header section contains an overview of the header bar on the Citizen Portal and how it has been modified to meet PRMP requirements, including pages related to the Sign up and Log in flow. Within the header, citizens will have the ability to navigate to the home page, apply for benefits, sign up for an account, and log into their account.



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Figure 9: Header Page Flow





I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Figure 10: RIDP Page Flow <CR157>

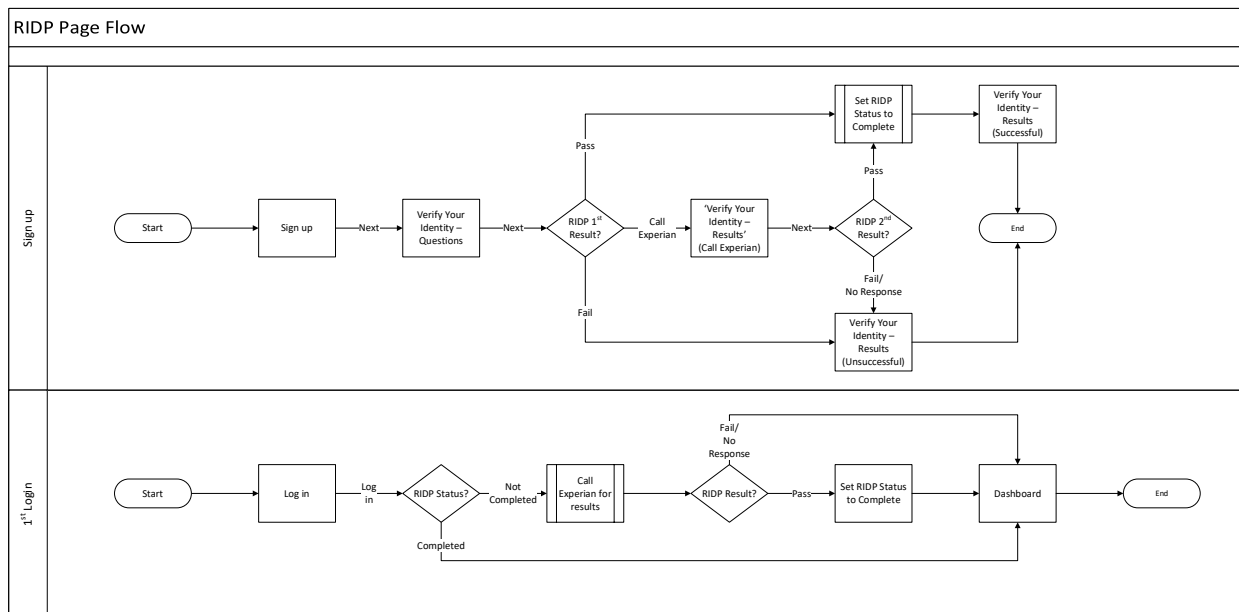
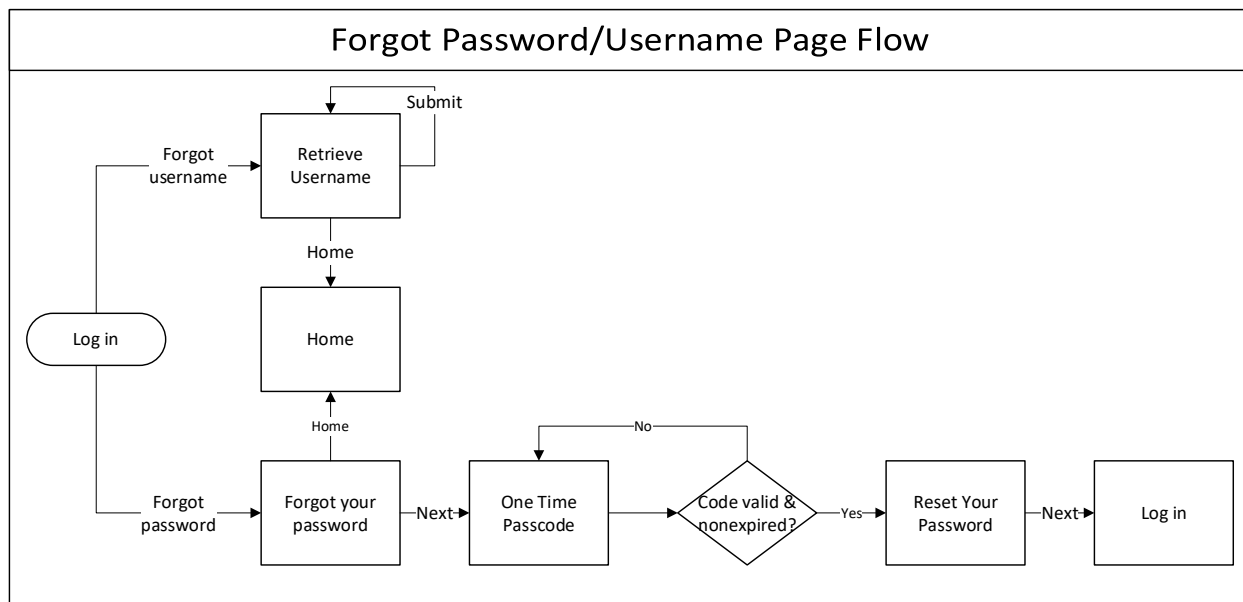


Figure 11: Forgot Password/Username Page Flow <PRMO-224>



The Citizen Portal supports four types of accounts:

- Public citizen account: When citizens view the Home page, they are automatically logged in under the public citizen account. This account has



access only to the home page and the pages that allow citizens to create an account, login to their account, retrieve usernames, and reset passwords.

- **Anonymous account:** When the citizen clicks a link to start screening, they are logged out as public citizen and logged as an anonymous account. Citizens cannot start an application when logged in as Anonymous account.
- **Registered accounts:** Registered accounts are standard accounts that are created by citizens. Citizens can create accounts when they first use the application, or during processes like applying for benefits. These accounts are different from anonymous accounts in that they allow citizens to continue previously saved applications, restart applications that were previously unfinished, and review or withdraw previously submitted applications.
- **Linked accounts:** Linked accounts are accounts that are linked to a Person in PREE.

Per CMS Authentication Standards, the user e-authentication level and the factors used to log in will determine the user ability in the Citizen Portal.

Below is a high-level overview to certain functionality and its minimum requirement for access. This is not an all-inclusive list.

Functionality	Account Type	CMS e-Authentication Level
Create an account, retrieving username, resetting password	Public citizen account	1
Complete Pre-Screening	Anonymous account	1



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Functionality	Account Type	CMS e-Authentication Level
Apply online, save application, view status of application, upload documents, resume saved application, and view PDF of submitted application	Registered account	1
View notices, appointments, coverage information, report changes and complete an online Renewal.	Linked account	3

~~For R1,~~ All account types will be available. After the registration process, if the user passes RIDP, their CMS e-Authentication Level is set to 3, else it is set to 1. Users who failed RIDP must complete the IDP process per PRMP policy to obtain full access. ~~to see supplemental benefit information for stabilization release.~~

5.2.1 Header

The Citizen Portal header contain links to the following pages:

- Home
- Apply for benefits
- Sign up
- Log in

Below are the mockups of the header with the citizen log in and log out.



5.2.1.1 Screenshot (Modify)

Figure 12: Header (Log out)



Figure 13: Header (Log in)



5.2.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx HomeSignupLoginYourAccount.xlsx</p>	Header

5.2.2 (Online COC) Sign up

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



5.2.2.1 Screenshot (Modify)

Figure 14: Sign up <CR189>

Sign up

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

First Name

Middle Name Optional

Last Name

Second Last Name Optional

Date of Birth:
DD/MM/YYYY

SSN:

I do not have an SSN

Gender:

Address

Street 1:

Street 2:

City:

State:

Zip:

Email

Username

Password

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

[Show password](#)

What language do you wish to be contacted in?

I agree to the [terms and conditions](#)

Already have an account? [Login](#) >



5.2.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx Online COC General.xlsx	Sign up

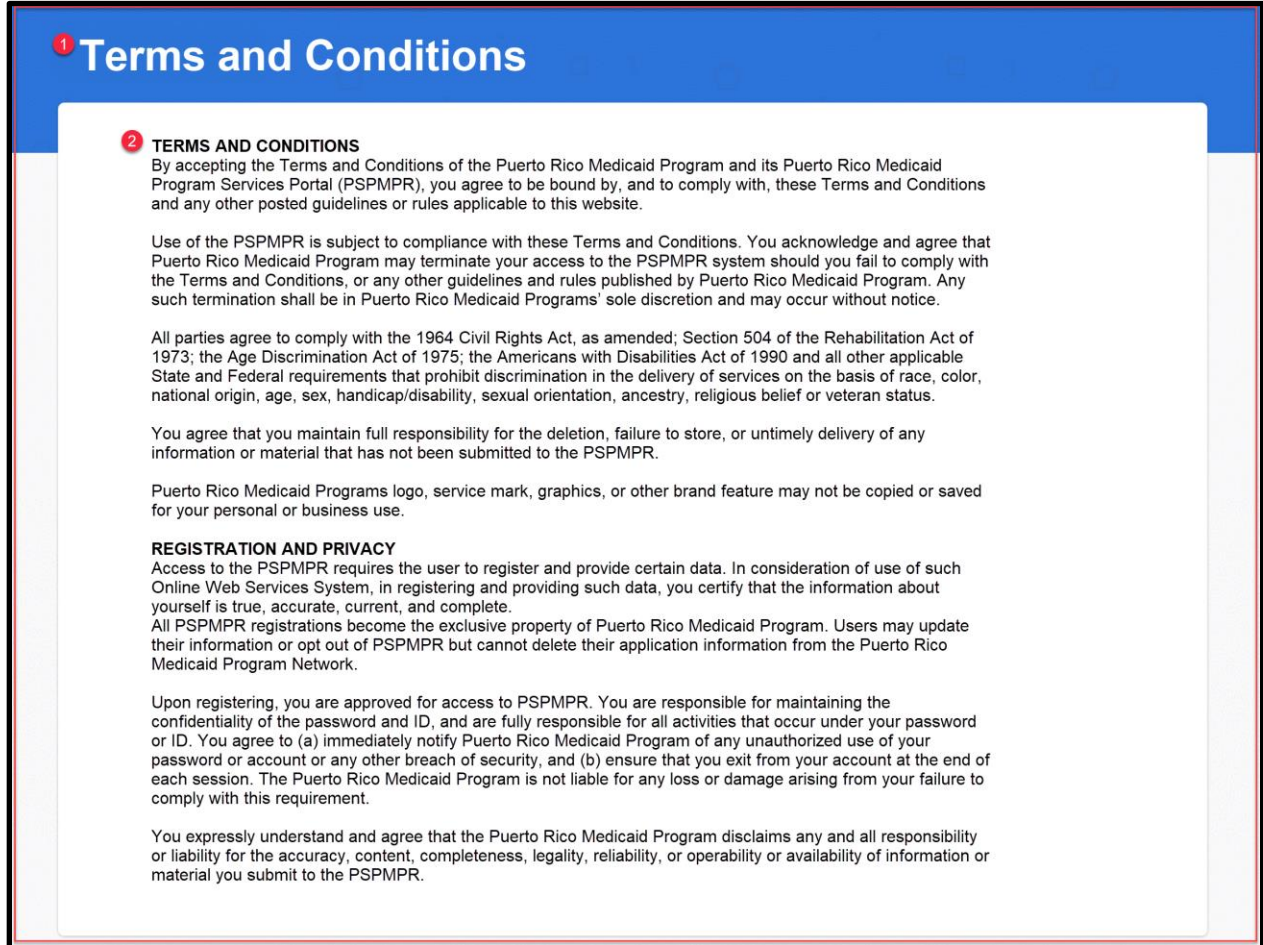
5.2.3 Terms and Conditions

When the citizen clicks on the 'terms and conditions' link on the 'Sign up' page, the 'Terms and Conditions' page will open on a new page.



5.2.3.1 Screenshot (New)

Figure 15: Terms and Conditions



5.2.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx CitizenPortal-HomeSignupLoginYourAccount.xlsx	Terms and Conditions
Terms and Conditions.docx	Not Applicable (N/A)



5.2.4 Verify your Identity Questions

This page is displayed after gathering the required information to identity proof a user. The page displays questions received from RIDP. See the RIDP Interface Control Document for more information about the RIDP process.

5.2.4.1 Screenshot (Modify)

Figure 16: Verify your Identity Questions

Verify Your Identity Questions

Question 1

Answer 1
 Answer 2
 Answer 3
 Answer 4

Question 2

Answer 1
 Answer 2
 Answer 3
 Answer 4

Question 3

Answer 1
 Answer 2
 Answer 3
 Answer 4

4

5.2.4.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>CitizenPortal-HomeSignupLoginYourAccount.xlsx</p>	Verify Your Identity - Question

5.2.5 Verify Your Identity – Results

For the user to have full access to the Citizen Portal, including the ability to view benefit information, their identity must be verified per CSM e-Authentication Level 3 protocol. The 'Verify Your Identity – Results' page will display the RIDP result.

There are 3 possible results:

- Successful: Successful verification
- Request to complete by phone: Unsuccessful online verification with prompt to complete over-the-phone verification
- Unsuccessful: Unsuccessful verification OR error message/connectivity issue with RIDP

5.2.5.1 Screenshot (New)

Figure 17: Verify Your Identity – Results (Successful)

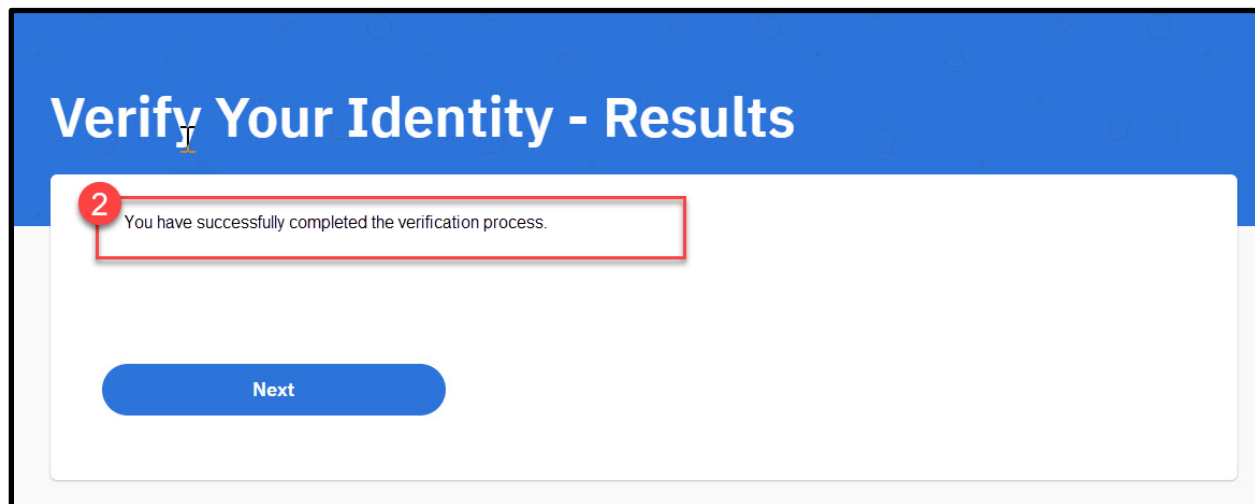


Figure 18: Verify Your Identity – Results (Unsuccessful w/ prompts to call)



Verify Your Identity - Results

4 You account has been successfully created. However, we are unable to verify your identity at this time.

To expedite the processing of your application, you will need to complete the identity verification process. To complete the identity verification process over the phone, call 1-866-578-5409 and give them the following code. Verification ID <Insert DSH Reference Number received from the Hub>.

Alternatively, please be aware that you may have to visit our office to complete the identity verification process in person.

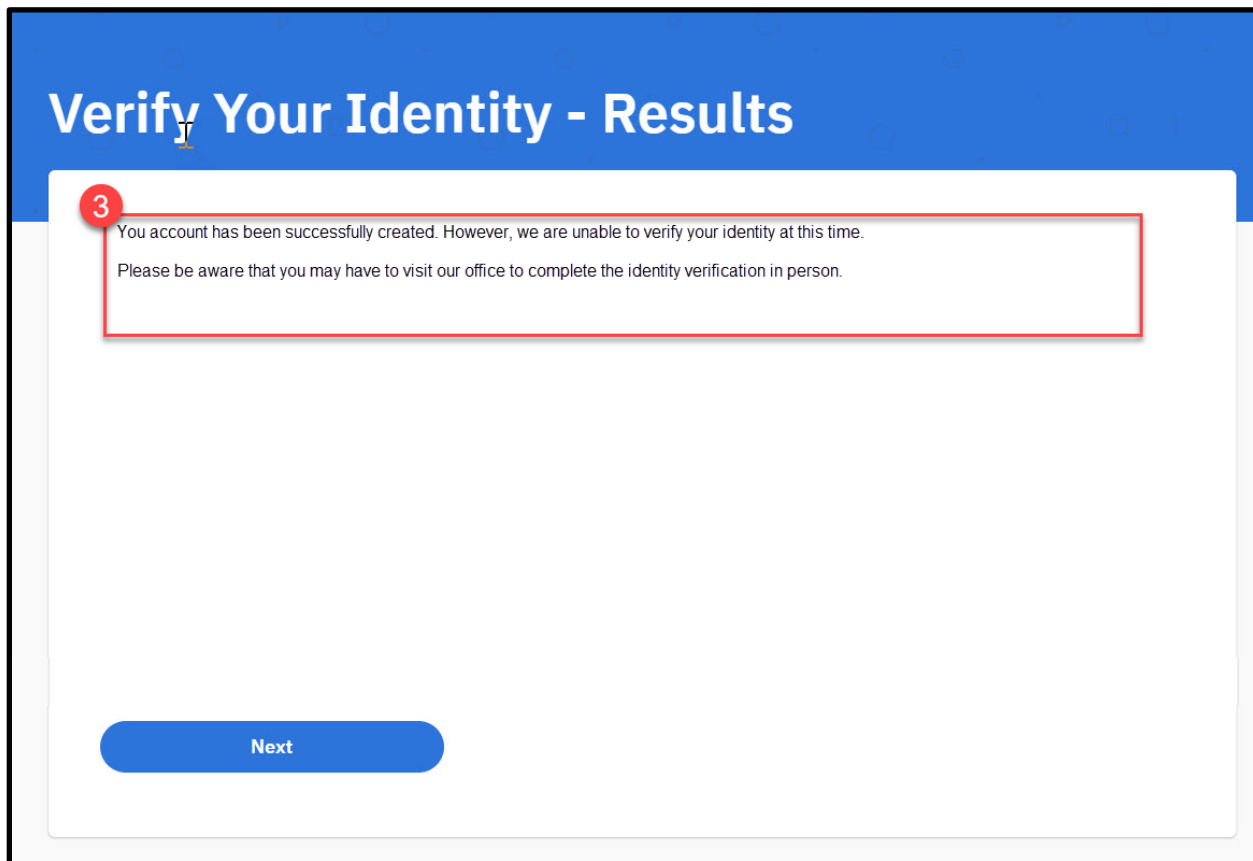
5 By checking this box, I am confirming that I called the number provided and completed my identity verification over the phone.

6 By checking this box, I am confirming that I understand that I may have to visit the office in person to complete the verification process.

Next



Figure 19: Verify Your Identity – Results (Unsuccessful)



5.2.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>CitizenPortal-HomeSignupLoginYourAccount.xlsx</p>	<p>Verify Your Identity – Results</p>

5.2.6 Log in

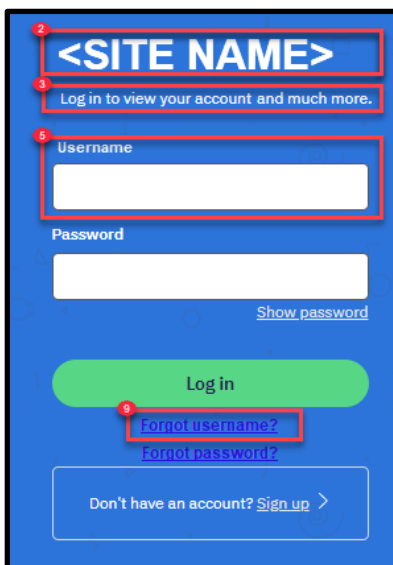
There are various ways a citizen can access the Log in page. The most common way is by clicking on the 'Log in' button from the header. Citizens can log into their



existing account from this page, retrieve their username, or reset their password by clicking on the “Forgot username?” or “Forgot password?” links. Users will be given 5 consecutive trials to log into their account. After the password is entered incorrectly for the 5th consecutive time, then the account will be locked, and user must reset their password.

5.2.6.1 Screenshot (Modify)

Figure 20: Log in



5.2.6.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>CitizenPortal-HomeSignupLoginYourAccount.xlsx</p>	Log in

5.2.7 (Online COC) <CR189> Security question

The 'Security question' page will no longer display. <PRMO-224> User will only be required to enter their username and password correctly to access the account.

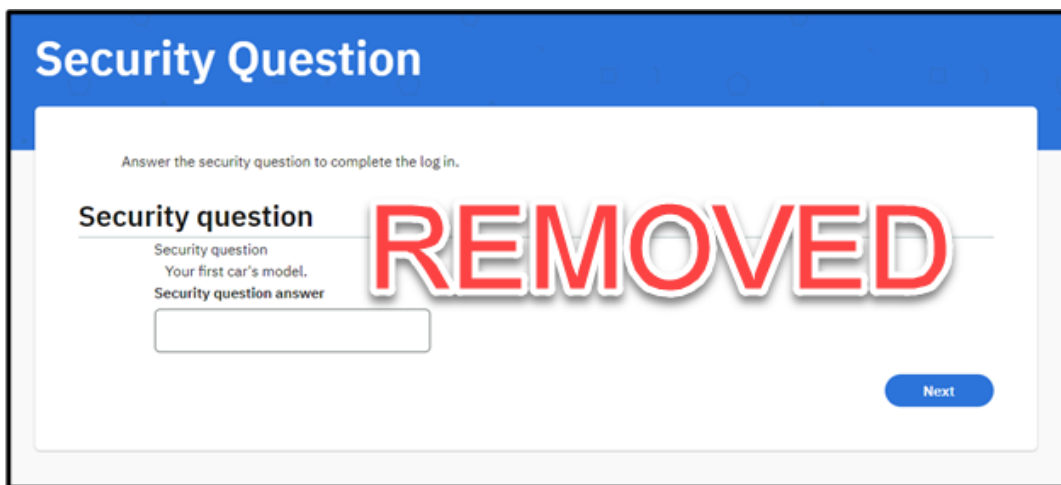
~~after users completed the security set up. For users with an account prior to the MFA release, they will be asked to answer a security question correctly to proceed~~



~~with setting up their security phone number. Once the security set up is complete, the user will no longer be asked to enter the answer to a security question.~~

5.2.7.1 Screenshot (Remove Modified)

Figure 21: Security question



5.2.7.2 Description of Modifications and Additions

Do not display this page.

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

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

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

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

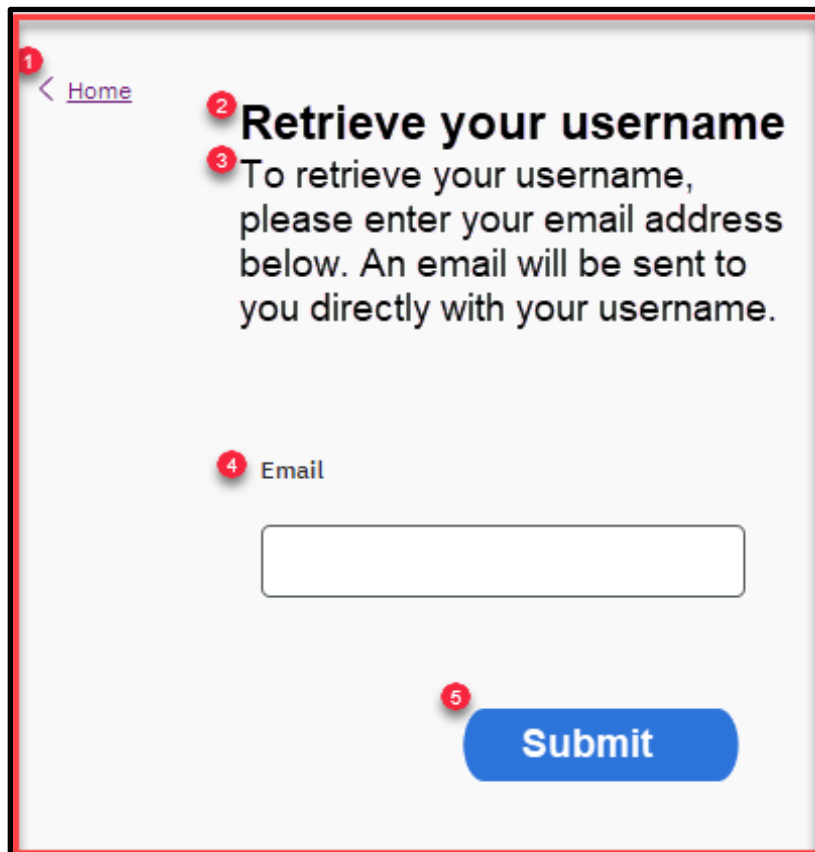
5.2.8 Retrieve your username

On the 'Retrieve your username' page, citizen has the ability to retrieve their username by email when a valid email is entered.



5.2.8.1 Screenshot (New)

Figure 22: Retrieve your username



5.2.8.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>CitizenPortal-HomeSignupLoginYourAccount.xlsx</p>	Retrieve Username

5.2.9 Forgot your password

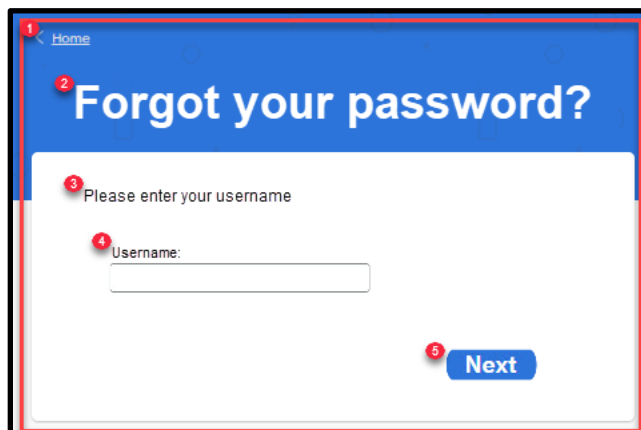
On the 'Forgot your password' page, citizens are asked to enter their username. <PRMO-224> Once the username is entered correctly, an email will be sent with a passcode. The passcode should be entered on the Enter Your Passcode page. The



system will retrieve an answered security question to be displayed on the 'Reset your password' page.

5.2.9.1 Screenshot (New)

Figure 23: Forgot your password



5.2.9.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>CitizenPortal-HomeSignupLoginYourAccount.xlsx</p>	Forgot your password

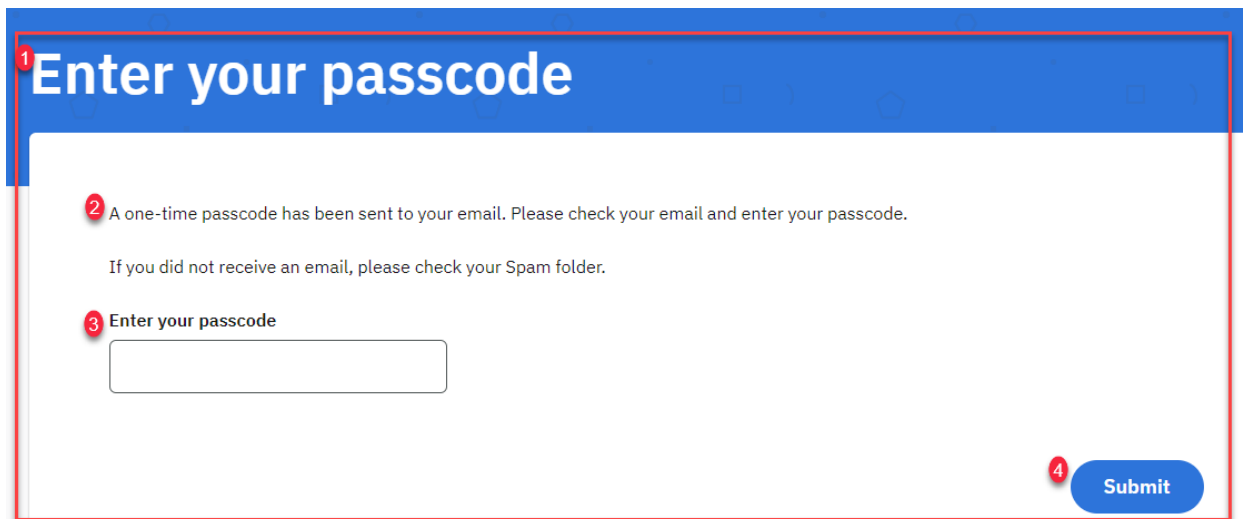
5.2.10 <PRMO-224> Enter Your Passcode

This page will display after the Forgot Your Password page and will require the user to enter the passcode that was sent by email. If the passcode is entered correctly and within 5 minutes of the page being displayed, the Reset Your Password page will display.



5.2.10.1 Screenshot (New)

Figure 24: Enter Your Passcode



5.2.10.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx	Enter Your Passcode

5.2.11 (Online COC) <CR189> Reset Your Password

<PRMO-224> This page will be displayed when the user enters the correct passcode within the 'Enter Your Passcode' page and clicks on the submit button. ~~In addition to displaying when user clicks on 'Forgot password?' link,~~ The 'Reset Set Your Password' page will also be display when a user account was created by a caseworker and the user is logging in for the first time with their temporary password.



5.2.11.1 Screenshot

Figure 25: Reset Set your password (Modify New)

5.2.11.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx Online COC - General.xlsx	Reset your password

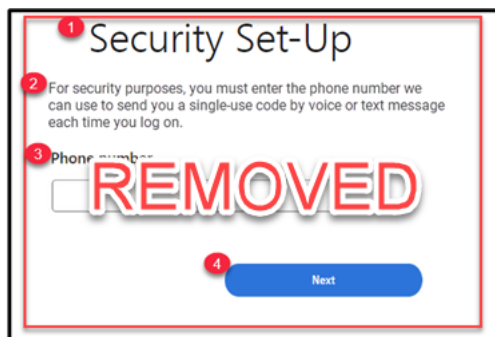
5.2.12 (Online COC) <PRMO-224> <CR189> Security Set-Up

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

This page is being removed by PRMP decision to not implement MFA.

5.2.12.1 Screenshot

Figure 26: Security Set-Up (Remove)



5.2.12.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>Online COC - General.xlsx</p>	<p>Security Set-Up</p>

5.2.13 (Online COC) <PRMO-224> <CR189> Security Code Verification (Selection)

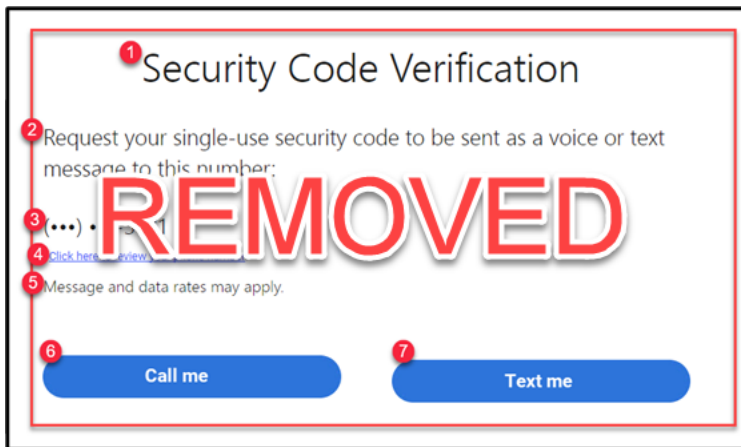
The 'Security Code Verification (Selection)' page will display each time a user logs in or updates their phone. On this page, user will indicate how they want their single-use code to be sent, by voice or text.

This page is being removed by PRMP decision to not implement MFA.



5.2.13.1 Screenshot

Figure 27: Security Code Verification (Selection) (Remove)



5.2.13.2 Description of Modifications and Additions

Details located in:

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

5.2.14 (Online COC) <PRMO-224> <CR189> Security Code Verification

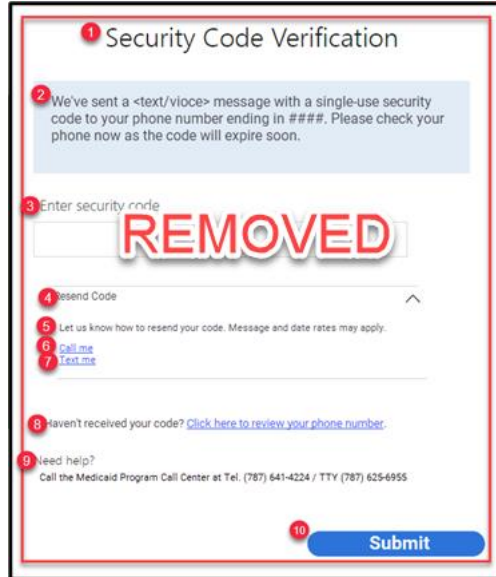
The 'Security Code Verification' page will display each time a user logs in or updates their phone. On this page, user will enter the single-use code received by voice or text.

This page is being removed by PRMP decision to not implement MFA.



5.2.14.1 Screenshot

Figure 28: Security Code Verification (Remove)



5.2.14.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx Online COG General.xlsx	Security Code Verification

5.3 Citizen Portal Footer

The Citizen Portal header contains links to the following pages:

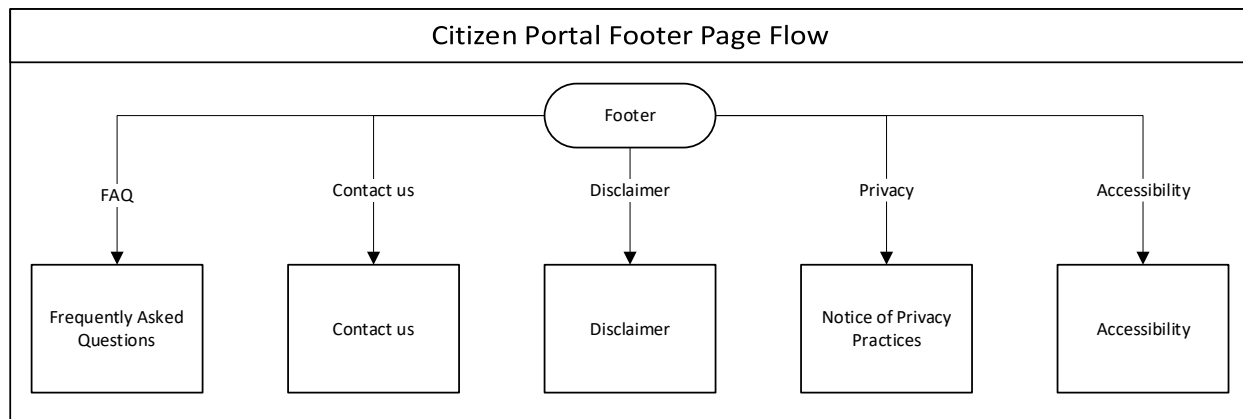
- [FAQ](#)
- [Contact us](#)
- [Disclaimer](#)
- [Privacy](#)
- [Accessibility](#)

Within the footer, the citizen can also change the language between English and Spanish. The default language is Spanish; citizens will always be greeted in



Spanish. Citizens who prefer to navigate the site in English can do so by selecting English from the dropdown.

Figure 29: Footer Page Flow



5.3.1 (Online COC) Footer

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

5.3.1.1 Screenshot (Modify)

Figure 30: Footer



5.3.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>Online COC General.xlsx</p>	Footer

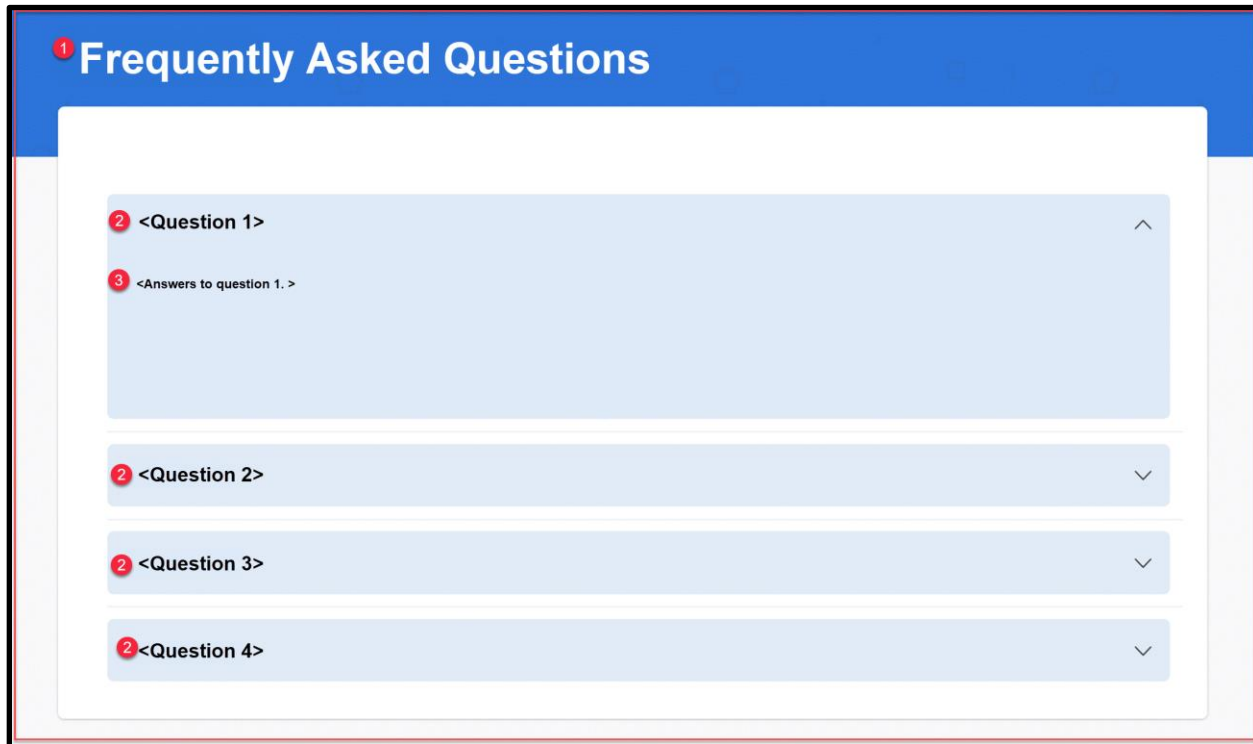
5.3.2 Frequently Asked Questions

The 'Frequently Asked Questions' page will display questions and answers provided by PRMP that are presumed as questions that will be frequently asked by the citizens.



5.3.2.1 Screenshot (New)

Figure 31: Frequently Asked Questions



5.3.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx CitizenPortal- HomeSignupLoginYourAccount.xlsx	FAQ
FAQs-English.docx	N/A
FAQs-Spanish.docx	N/A

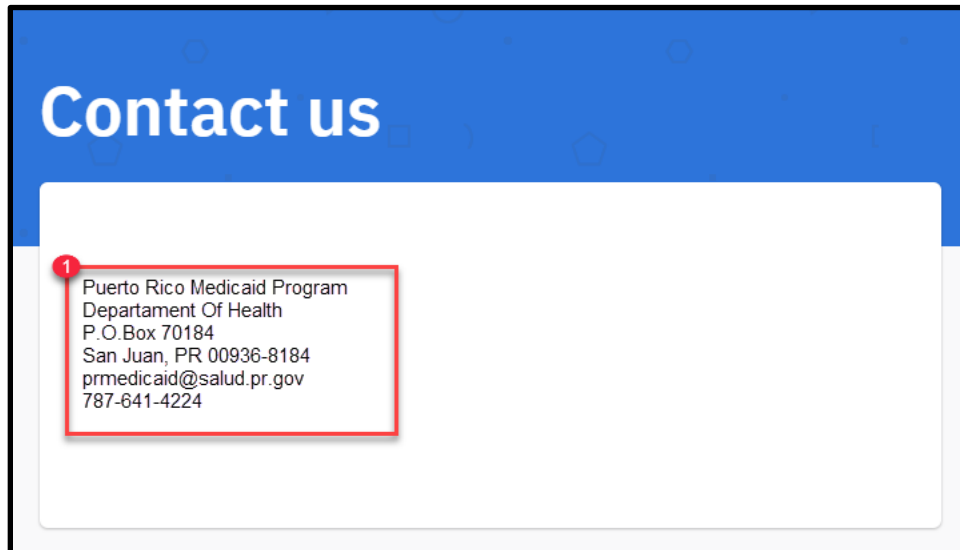
5.3.3 Contact us

The 'Contact us' page will display PRMP contact information.



5.3.3.1 Screenshot (Modify)

Figure 32: Contact us



5.3.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>CitizenPortal-HomeSignupLoginYourAccount.xlsx</p>	Contact us

5.3.4 Disclaimer

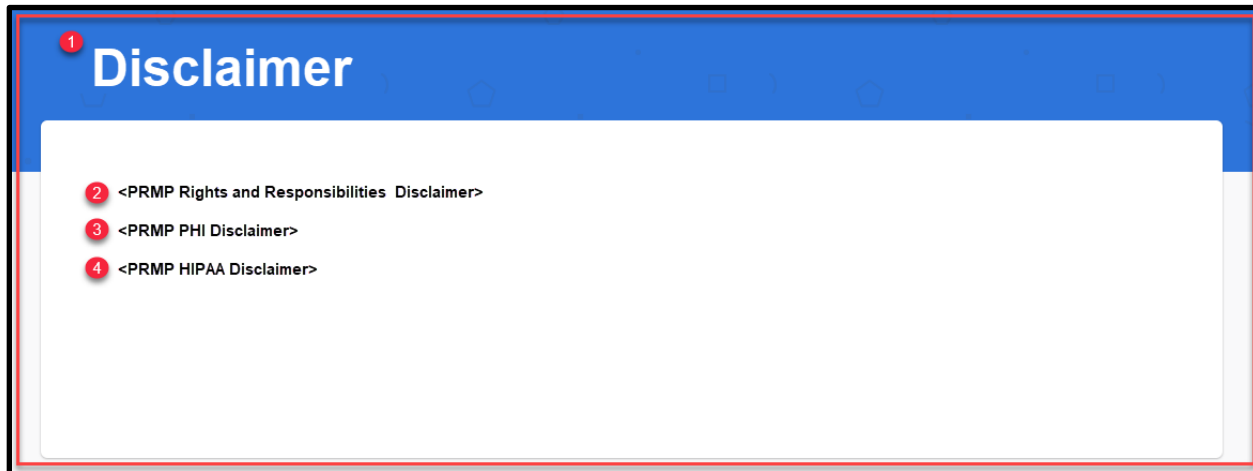
The 'Disclaimer' page will contain the following disclaimer messages

- PRMP Rights and Responsibilities
- PRMP PHI
- PRMP HIPAA



5.3.4.1 Screenshot (Modify/New)

Figure 33: Disclaimer



5.3.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx CitizenPortal-Application.xlsx	Disclaimer
PHI-Spanish.docx	N/A
PHI-English.docx	N/A
HIPAA-Spanish.docx	N/A
HIPAA-English.docx	N/A

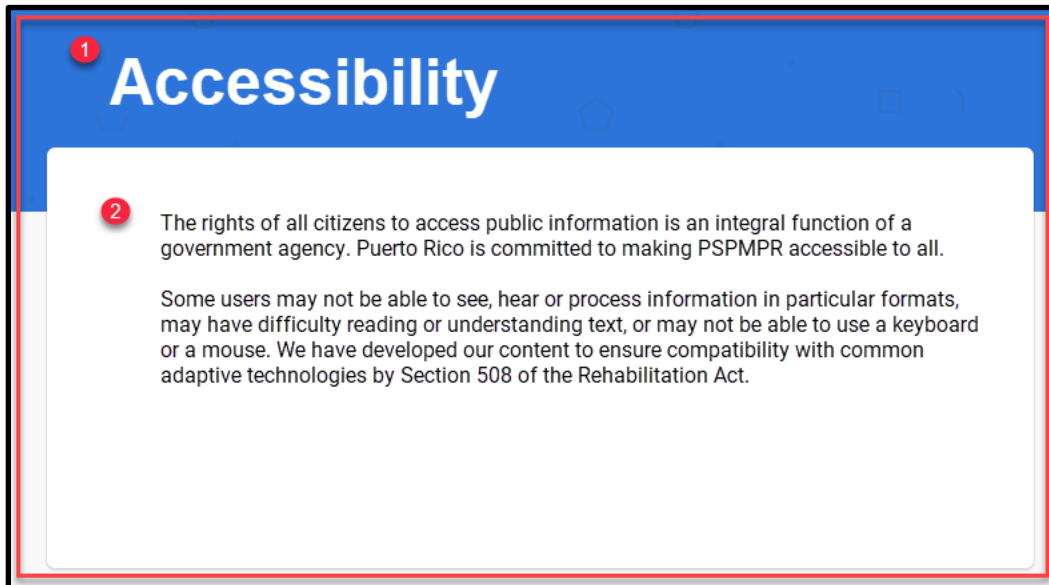
5.3.5 (Online COC) Accessibility

The Accessibility page will provide user with PRMP Accessibility information.



5.3.5.1 Screenshot (Modify)

Figure 34: Accessibility



5.3.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx Online COC General.xlsx	Accessibility

5.4 <CR-132> Your Account

The 'Your Account' section of the Citizen Portal provides citizens with access to certain functionalities based on their CMS e-Authentication Level. Those at level 1 can apply online and submit supporting documents against pending decision applications. Those at level 3 can do the same as level 1 plus can see supplemental benefit information.

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

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



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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

<CR189>

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

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

Table 3: User Account and Functionality Mapping

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



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

When a user account meets the following criteria:					
	<CR189> Change in Address	Visible and prepopulated with all available data from the identified IC	N/A	N/A	N/A
	<CR189> Add/Remove HHM	Visible and prepopulated with all available data from the identified IC	N/A	N/A	N/A
Notices	Notices	Visible with Notices from IC and link Person	Visible with Notices from link Person	Visible with Notices from link Person	N/A
Apply for Benefits	Application	Prepopulated application	Blank application	Blank application	Blank application



Figure 35: Your Account Page Flow

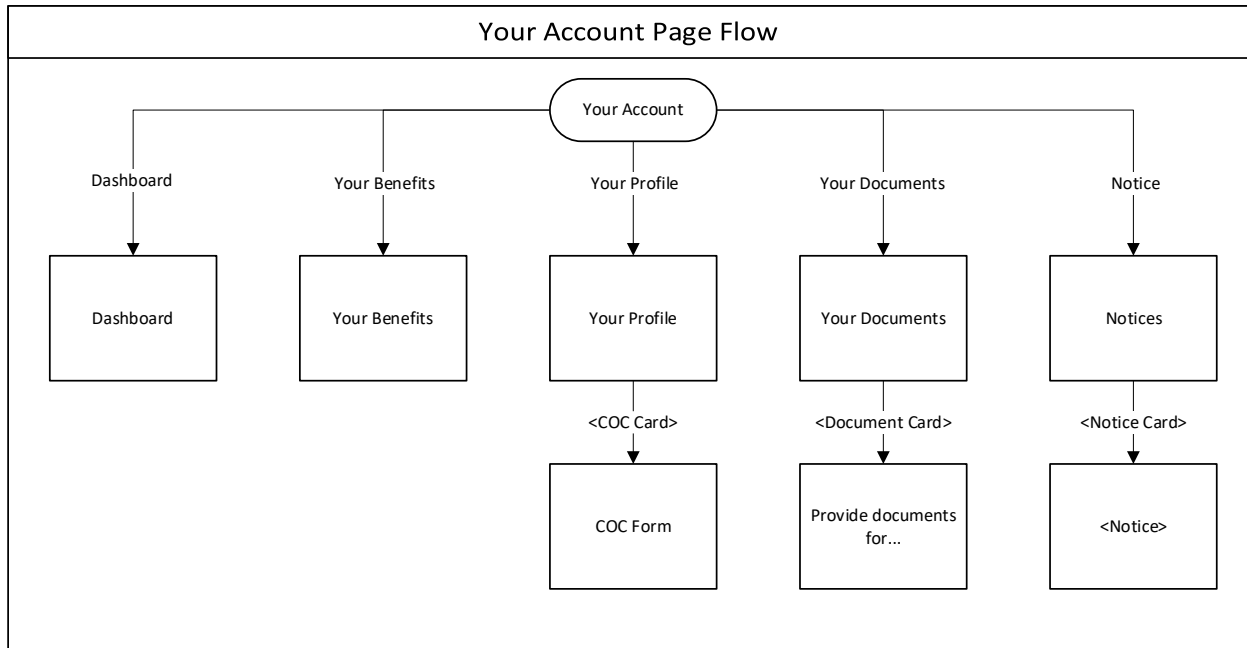


Figure 36: Dashboard Page Flow

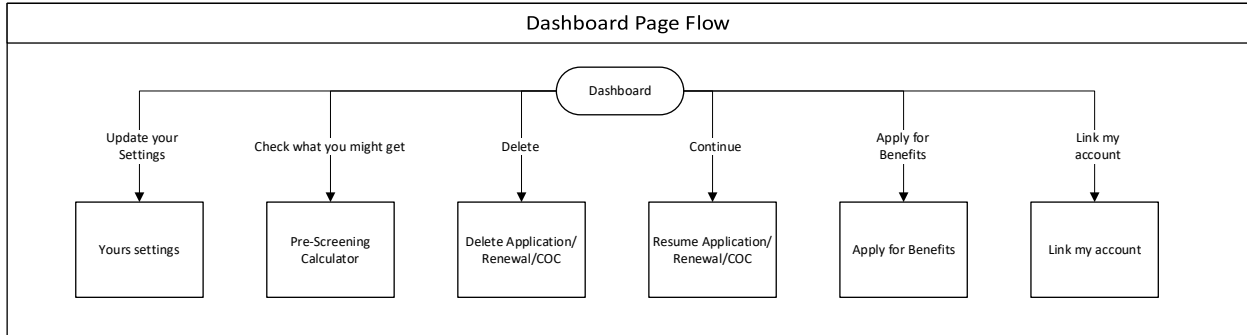
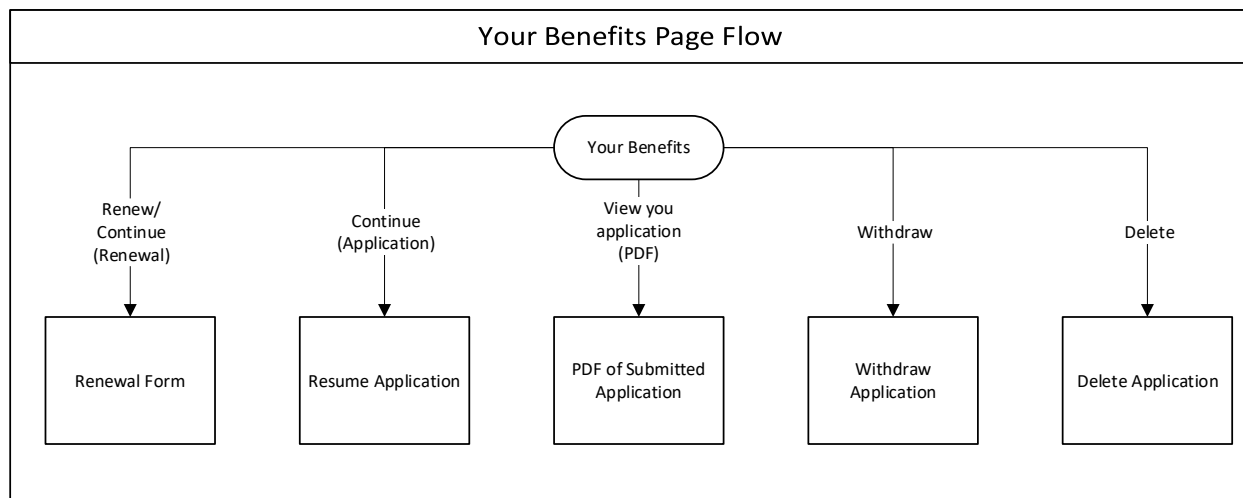




Figure 37: Your Benefits Page Flow



5.4.1 (Online COC) Dashboard

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



5.4.1.1 Screenshot (Modify)

Figure 38: Dashboard – Registered Account

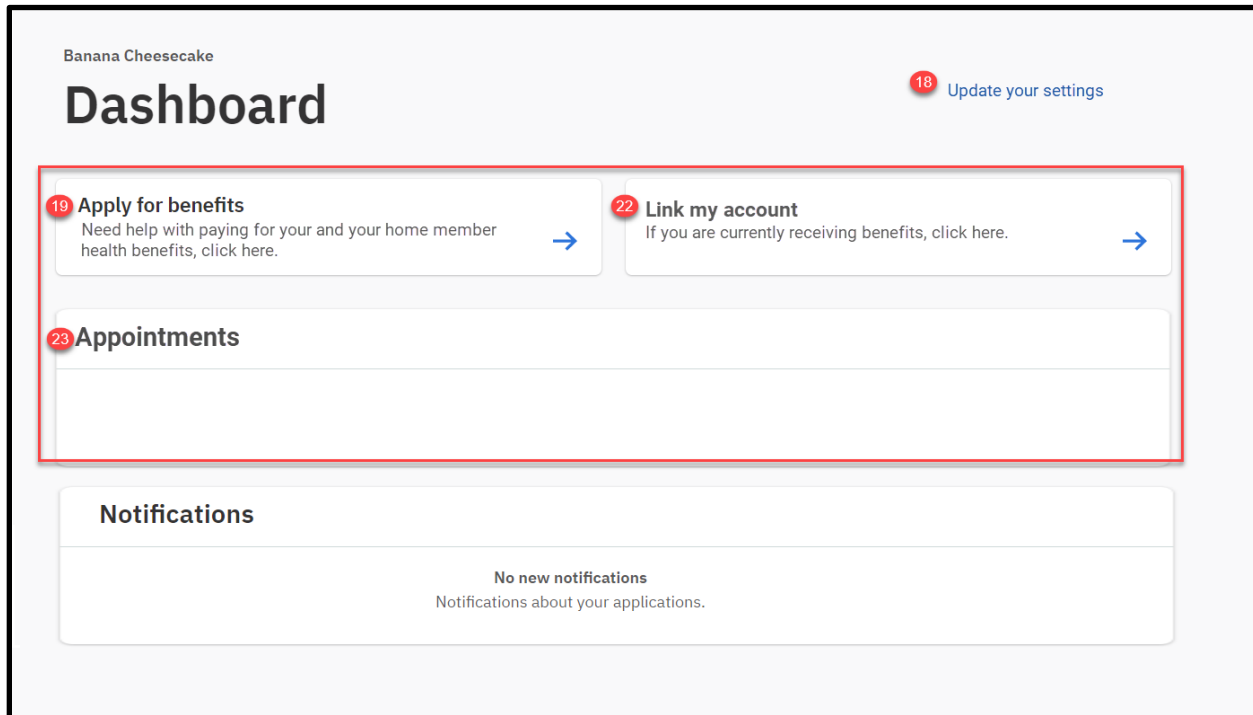
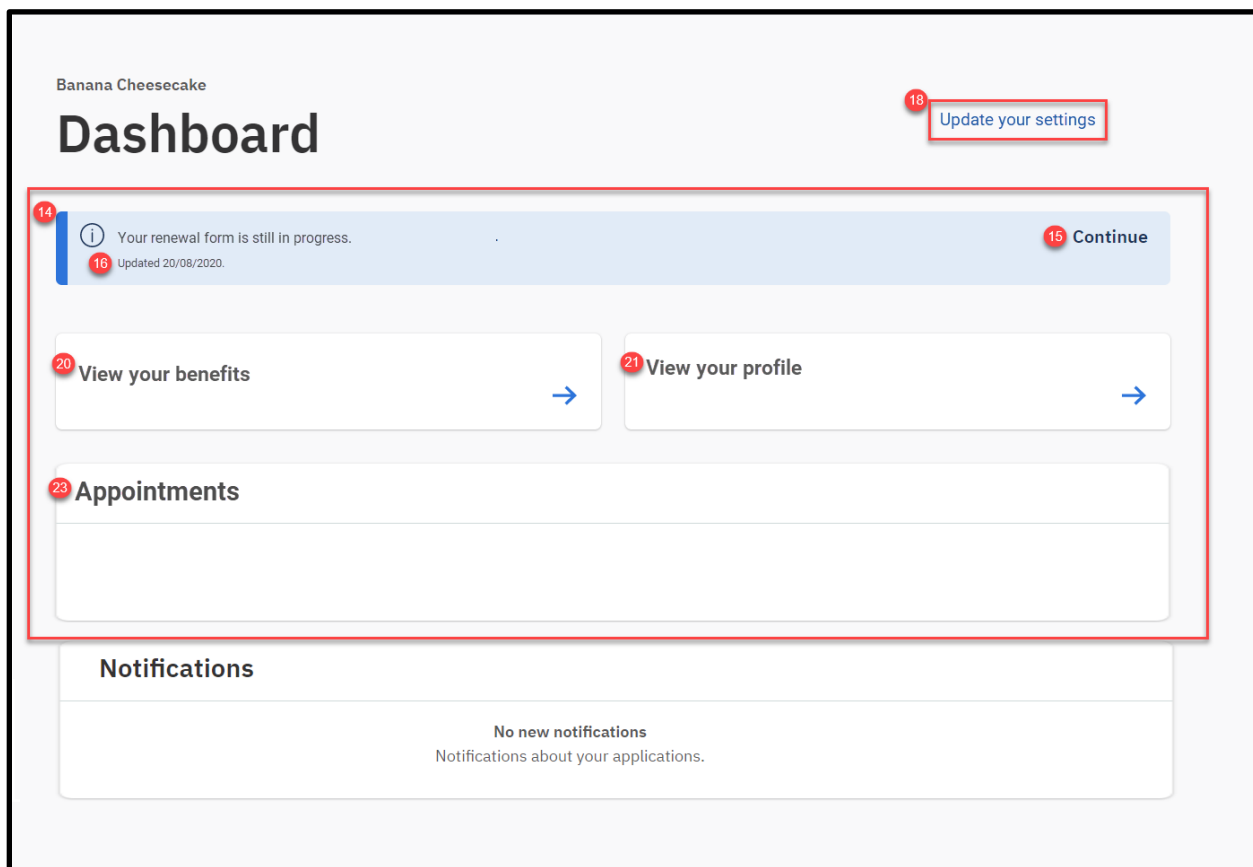




Figure 39: Dashboard – Linked Account



5.4.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Citizen Portal Pages.xlsx Online COC General.xlsx	Dashboard

5.4.2 (Online COC) Link My Account

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



5.4.2.1 Screenshot

Figure 40: Link my account

1 < Back

2 Link my account

3 Are you receiving benefits from the Puerto Rico Government Health Plan or have you in the past? If so, you can use PSPMPR to manage your benefits online, anytime. Simply complete the form below to submit a request to link your PSPMPR account to your case information.

Things You'll Be Able To Do:

- View the status of your coverage
- Renew your benefits
- Report changes - income, household members, expenses or address
- Upload supporting documents
- View notices
- View upcoming appointments

4 Have you ever received benefits from the Puerto Rico Government Health Plan?

Select...

5 Enter your MPI: optional

6 Upload a proof of your identity, such as a copy of your driver's license, your voting card, or any other photo identification.

7 Browse...

8 Submit

5.4.2.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>Online COC General.xlsx</p>	Link My Account

5.4.3 (Online COC) Your Benefits

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

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

<CR-143> See Citizen Portal Pages spreadsheet for the updated display condition for the Renewal button.

Table 4: Renewal Status

Citizen Portal Renewal Status	Recert Record Status	Online Renewal Form	Within Recert Period
Not Completed	<ul style="list-style-type: none"> ■ None ■ In Progress ■ Manual Recertification 	Not submitted	Yes
Pending Decision	<ul style="list-style-type: none"> ■ None ■ In Progress ■ Manual Recertification 	Submitted	Yes
Pending Verifications	<ul style="list-style-type: none"> ■ Pending Verifications 	Any	Yes
Completed	<ul style="list-style-type: none"> ■ Completed/Eligible ■ Completed by ExParte/Eligible ■ Completed/Ineligible 	Any	Yes
Past Due	<ul style="list-style-type: none"> ■ None ■ In Progress ■ Manual Recertification 	Any	Yes and Adequate Notice Period <CR-143> until the end of the 90 day post certification end date.



5.4.3.1 Screenshot

Figure 41: Your benefits – Registered Account without applications

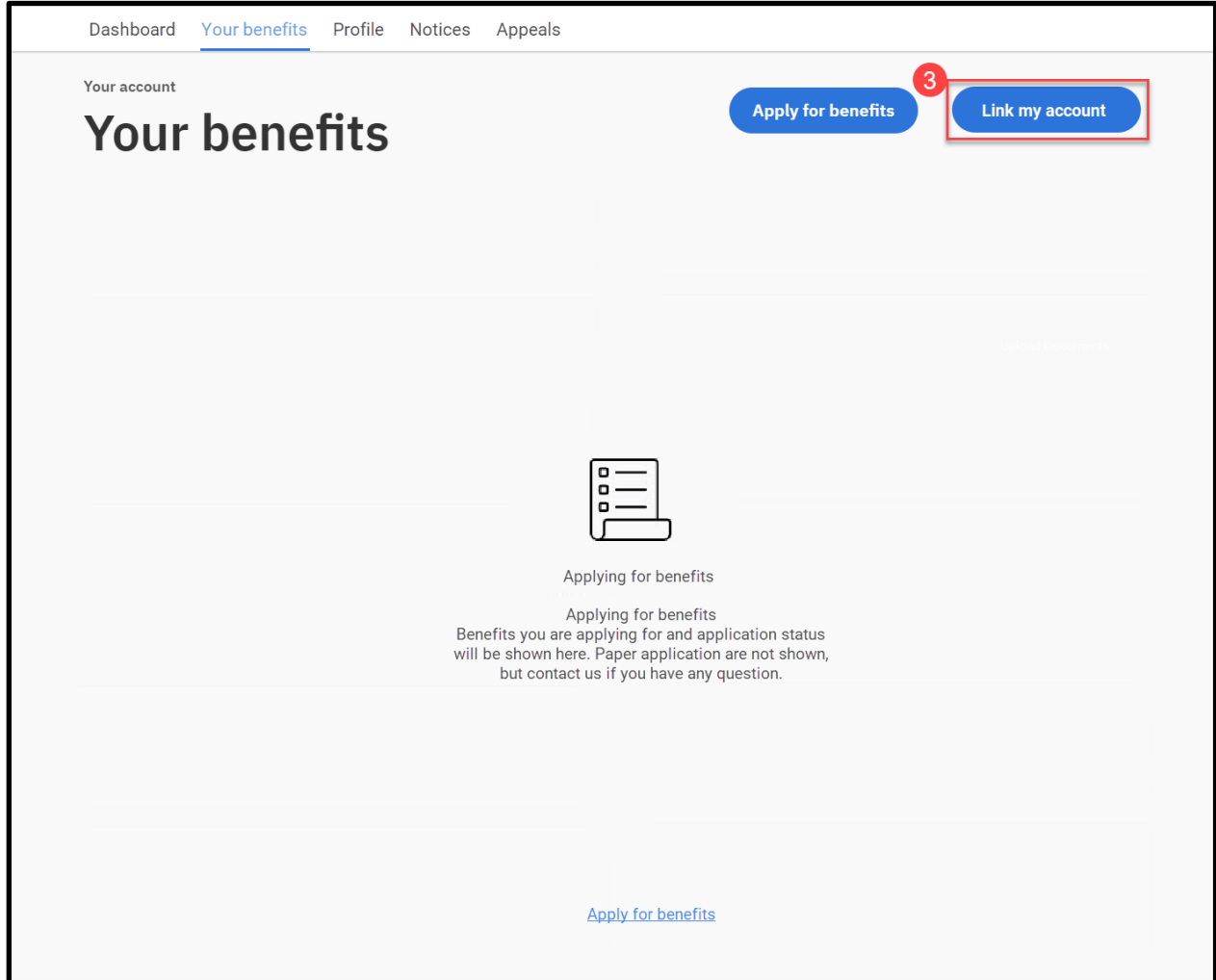
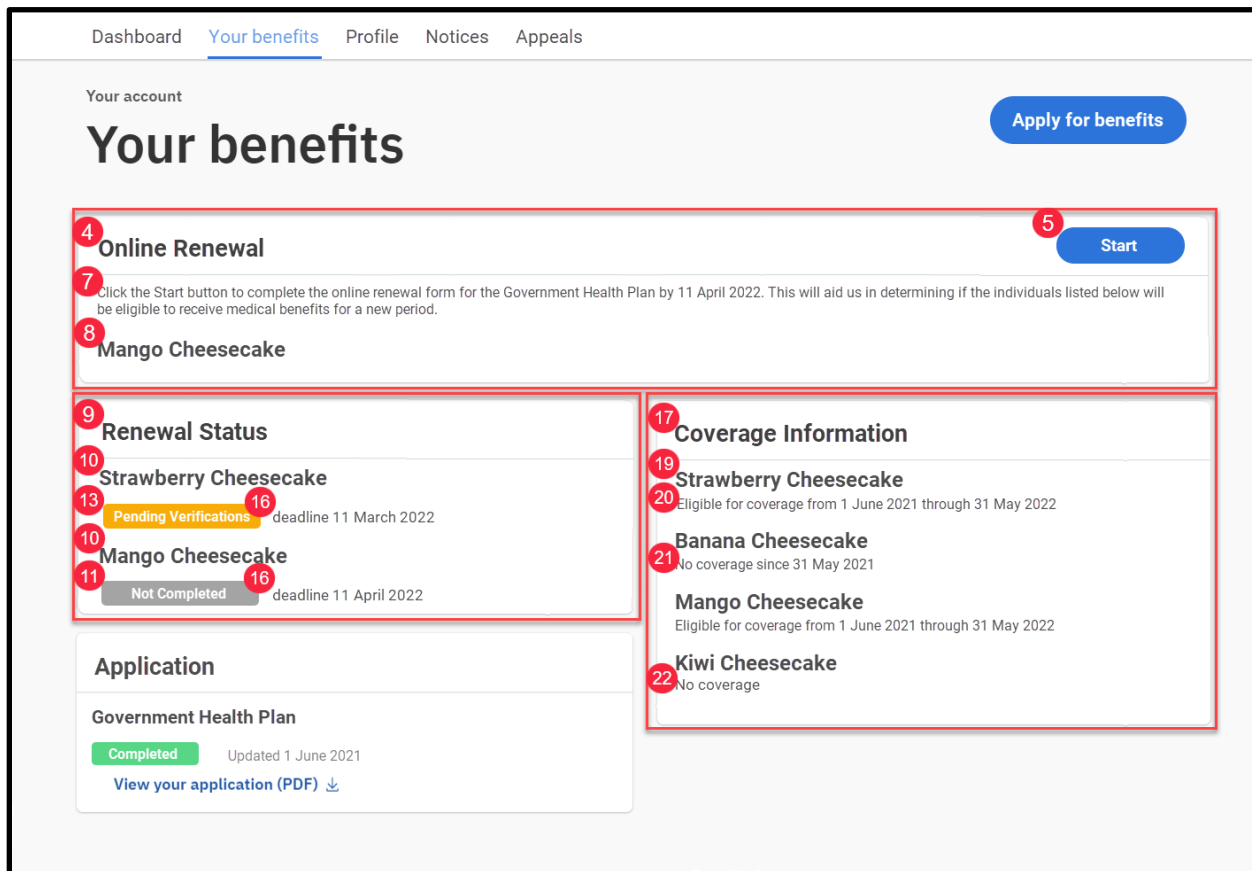




Figure 42: Your benefits – Linked Account with coverage/applications



5.4.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
<p>Citizen Portal Pages.xlsx</p> <p>Online COC General.xlsx</p>	Your benefits

5.4.4 Application PDF

Each submitted application is saved as a PDF. The screenshot of the 'Application PDF' provided is for visual representation purposes only. The Application PDF is a dynamic document driven by the questions answered during the online intake application. It will not depict all field names and questions.



5.4.4.1 Screenshot (Modify)

Figure 43: Application PDF

Intake Application

Applicant: 10325994 **Reference Number:** 309

Person

Head of Household: Yes **First Name:** Strawberry

Last Name: Cheesecake **Address Same as Primary Client:** No

Help Paying for Benefits: Yes **Date Of Birth:** January 1, 2000

SSN: **Marital Status:** Married

Gender: Female **Black or African American:** No

US Citizen: **Asian:** No

Native Alaskan or American Indian: No

Native Hawaiian or Pacific Islander: No **White or Caucasian:** No

Other Ethnicity: No **Decline to Answer:** No

Blind: No **Disabled:** No

Pregnant: No **Receiving Current Benefits:** No

Mailing Address: No **Student:** No

Was Formerly in Foster Care: No

Page 1 of 2



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

Person

Residential Address

Address Line 1: 123 Maple St	City: San Juan
State: Puerto Rico	Zip: 00901

Expense

Amount: 500.00	Frequency: Monthly
Hospitalization/ Medical Expense Type: Outpatient Treatment	

Expense

Court - Ordered Child	
Expense Category: Support	Amount: 100.00
Frequency: Monthly	

Resource

Resource Page	
Category: Vehicle	Resource Amount: 0.00
Amount Owed: 900.00	Vehicle Make: AM General
Vehicle Model: Model	Year: 2,020
Vehicle Usage: Self Employment	Fair Market Value: 2,000.00

Electronic Signature Details

First Name: Strawberry	Last Name: Cheesecake
Rights and Responsibilities: Yes	Management And Protection Of Health: Yes
Authorize Release Information: Yes	Applicant Signature: Yes
Interview Time:	Interview Time:
Interview Time:	

5.4.4.2 Description of Modifications and Additions

Details located in:



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Document	Tab Name
CitizenPortal-HomeSignupLoginYourAccount.xlsx	Application PDF

5.4.5 Withdraw Application

For each application with status 'Pending decision', applicants will be given the option to withdraw their application. Once the request is completed, their application will be systematically withdrawn without the intervention of a caseworker.



5.4.5.1 Screenshot

Figure 44: Withdraw Application

5.4.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-HomeSignupLoginYourAccount.xlsx	Withdraw application

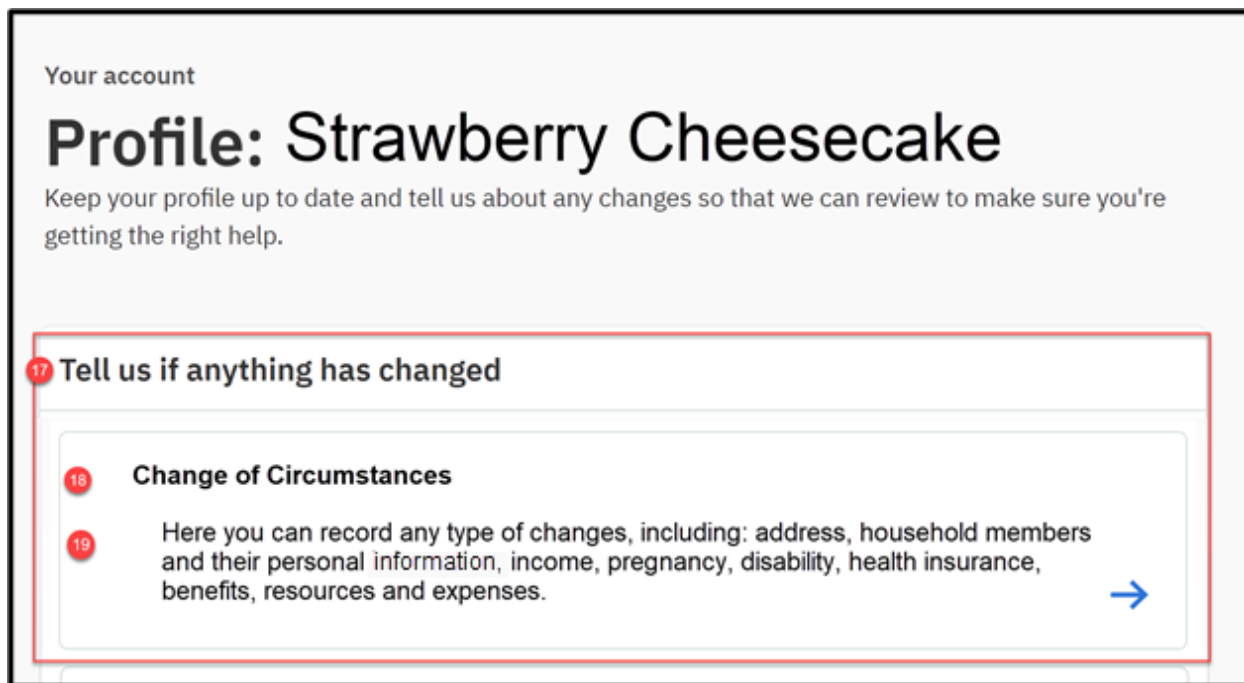


5.4.6 (Online COC) Your Profile

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

5.4.6.1 Screenshot (New)

Figure 45: Your Profile <CR189>



5.4.6.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
CitizenPortal-COC.xlsx	Your Profile



5.4.7 (Online COC) Your Settings

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

5.4.7.1 Screenshot (New)

Figure 46: Your settings (collapsed) <CR189> <PRMO-224>

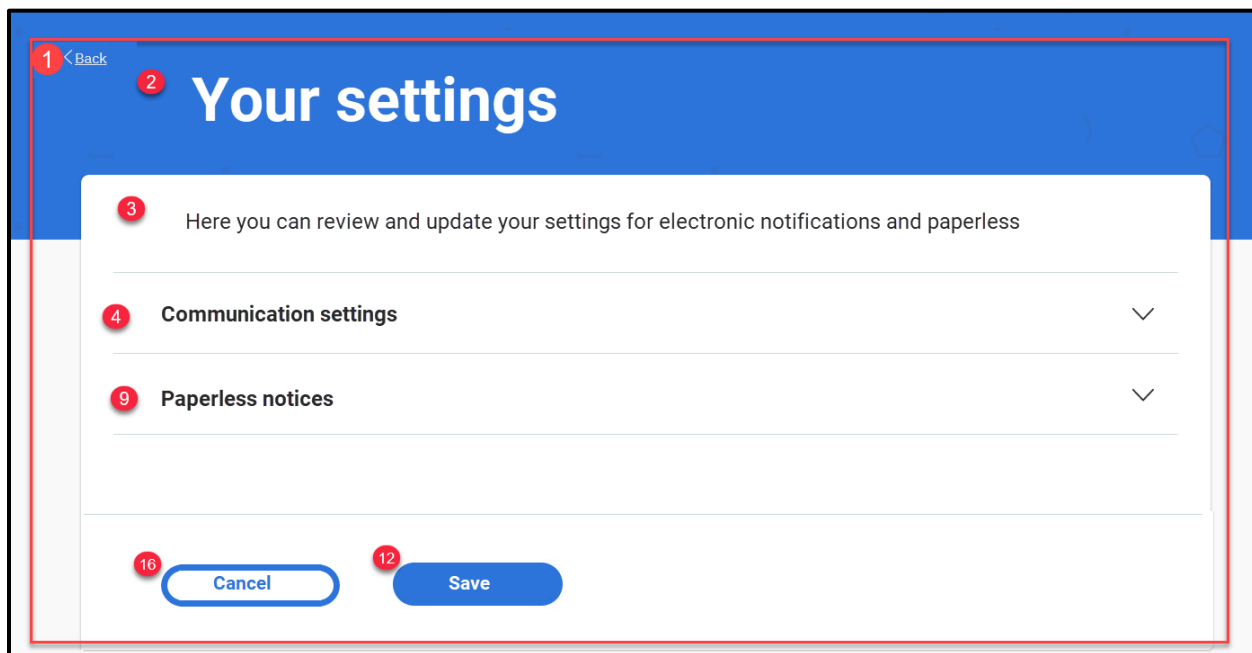




Figure 47: Your settings (expanded) <CR189> <PRMO-224>

1 < Back

2 Your settings

3 Here you can review and update your settings for electronic notifications and paperless notices from the Medicaid Program.

4 Communication settings

5 In this section you can change settings which control how we communicate with you about your benefits. Notifications provide alerts when we require your attention in PSPMPR, such as when a new notice is available or a new change was reported.

6 Email address:

8 What language do you wish to be notified in?

--Please Select--

9 Paperless notices

10 Save time and paper by choosing to go paperless to receive your notices online, rather than by postal mail. We'll send you a notification when your notices are available. You'll be able to see your notices, including mailed notices, in the Notice page in PSPMPR. However, notices not available electronically will still be mailed to you. You can change your choice at any time by returning to this page and selecting 'No'.

11 Would you like to go paperless and view your notices online?

Yes

16 Cancel 17 Save

5.4.7.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online COC - General.xlsx	Your settings

5.4.8 (Online COC) <CR189> Your Documents

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

5.4.8.1 Screenshot

Figure 48: Your Documents (Modify)

Your account

Your documents

5 Documents required
 You must submit documentation to verify this information.

Provide documents for Household Member

Not yet submitted

For Steph Nieves
Due May 29, 2021

→

Provide documents for Benefit

Not yet submitted

For Steph Nieves
Due May 29, 2021

→

11 Documents received
 We are reviewing your documents. Have you submitted all your documents?

Addresses

Documentation submitted

For Steph Nieves
Due May 29, 2021

- Submitted: Government Issued Photo ID

→

17 Documents accepted
 We have verified your information.

Birth and Death Details

Verified

For Steph Nieves

- Submitted: Military ID Card

→

Household Member

Verified

For Steph Nieves

→



5.4.8.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Your Documents

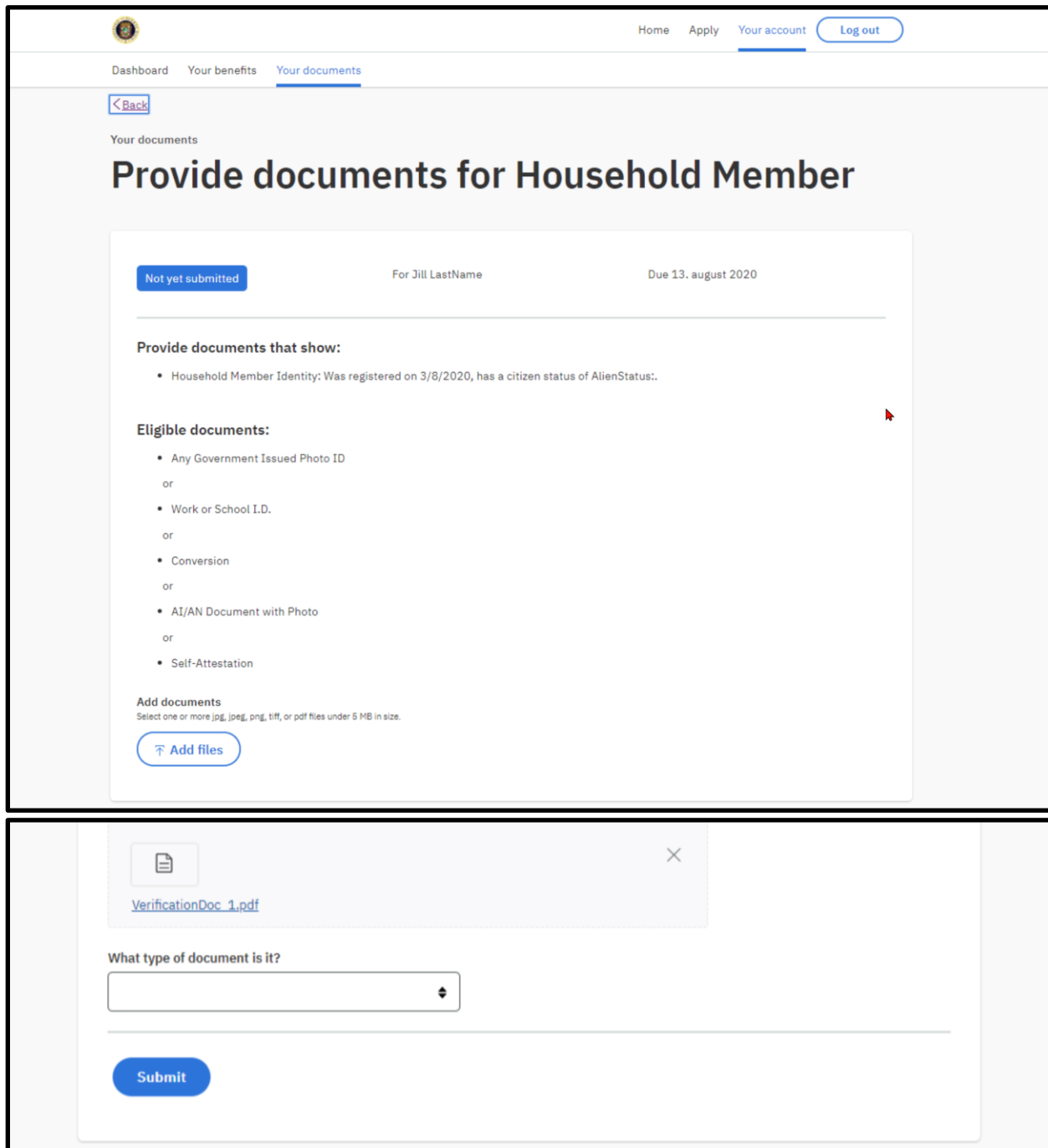
5.4.9 <CR-132> Provide documents for ~~Add a Document~~

When the applicant clicks on a card 'Add' on the 'Uploading Your documents' page, the 'Add a Document' page will display with a list of eligible documents the user can use as verification. This page will allow the applicant to select the document from a file on their computer, tablet, or mobile phone. When 'Next' is clicked, the uploaded document will be listed on the 'Uploading Documents' page.



5.4.9.1 Screenshot (Modify)

Figure 49: Provide documents for <Evidence> ~~Add a Document~~



5.4.9.2 Description of Modifications and Additions



Details located in:

Document	Tab Name
CitizenPortalPages.xlsx	Provide Documents For

5.4.9.2.1 <PRMO-452> Citizenship Instructions

If you are a U.S. citizen, you can provide ONE document to verify citizenship. Below is a list of the most commonly-used documents.

- U.S. Passport or U.S. passport card, even if expired.
- Certificate of Naturalization issued by the Department of Homeland Security (DHS forms N-550 or N-570).
- Certificate of U.S. Citizenship issued by the Department of Homeland Security (DHS forms N-560 or N-561).
- A Driver’s License or Identification Card issued by a U.S. State or Territory if the State requires proof of citizenship or an SSN before issuance. (A Puerto Rico Driver’s License meets this requirement. You may submit a Driver’s License or Identification Card from another state or territory if it meets the requirement.)
- Documentary evidence issued by a federally recognized tribe, with photo. The document should identify the federally recognized tribe that issued the document, identify the individual by name, and confirm the individual’s membership, enrollment or affiliation with the tribe. Such documents include, but are not limited to, a certificate of degree of Indian blood, tribal enrollment card, tribal census document, and documents on tribal letterhead.
- A social security number, which we will match with the Social Security Administration records.

If you are a U.S. citizen but cannot provide one of the above documents, you can establish U.S. citizenship by providing ONE of the documents in column (A) below provided it is also accompanied by ONE of the documents from column (B). (Any of these documents may be used to also confirm date of birth if that information is contained in the document.)

(A)

- U.S. Birth Certificate (see Notes 1 & 2).
- Certification of Report of Birth (Form DS-1350 or prior version FS 545).
- Report of Birth Abroad (Form FS-240).
- United States Citizenship Identification Card (I-197 or prior version I-179).
- Final adoption decree (see Note 3).
- Northern Mariana Islands Identification Card (I-873).
- Evidence of U.S. Civil Service employment before June 1, 1976.



- Documentation that a child meets the requirements of the Child Citizenship Act of 2000.
- Medical, school, insurance or religious records (see Note 4).
- U.S. Military Records, showing a U.S. place of birth.
- Federal or state census record showing a US citizenship or US place of birth

(B)

- State (or territory) Driver's license with photo.
- ID Card with photo, issued by federal, State or local government with the same identifying information as a driver's license.
- U.S. Military card or draft record.
- U.S. Coast Guard Merchant Mariner card.
- School identification card with photo with identifying information.
- Military dependent's identification card.
- For children under 19, a clinic, doctor, hospital or school record (including preschool or daycare).
- A finding of identity from an express lane agency

Notes:

1. U.S. Birth Certificate means a public birth certificate from one of:
 - ◆ the 50 States, the District of Columbia, Puerto Rico (on or after January 13, 1941), Guam (on or after April 20, 1899), the U.S. Virgin Islands (on or after January 17, 1917), American Samoa, Swain's Island, or the Northern Mariana Islands (after November 4, 1986).
2. For an individual born in Puerto Rico before January 13, 1941 – Evidence of birth in Puerto Rico plus a statement from the individual that he or she was residing in Puerto Rico, the U.S. or a U.S. possession on January 13, 1941.
3. A final adoption decree must show the child's name and place of birth in the U.S.
4. Medical records, Life, health or other insurance records, Official religious records or School records (including preschool, Head-Start and daycare) that show the individual's name and U.S. place of birth.

If you need help getting documents you need, you should still submit your application. You may self-attest to your status. If you meet all other criteria, you will be found eligible and you will have an opportunity to give your documentation later. If you do not give documentation, you will lose eligibility in 90 days. For a full list of documents that can be used to verify citizenship and identity, see federal requirements at 42 CFR 435.407: <https://www.govinfo.gov/content/pkg/CFR-2011-title42-vol4/pdf/CFR-2011-title42-vol4-sec435-407.pdf>. If you need help, you can contact the Help Center at (787) 641 4224 / (787) 625 6955 TTY/TDD. Para



obtener una copia de este formulario en español, llame nuestro CENTRO DE AYUDA al (787) 641 4224 / (787) 625-6955 TTY/TDD.

5.4.10 (Online COC) <CR189> Notices

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

5.4.10.1 Screenshot

Figure 50: Notices – No notices (Modify)

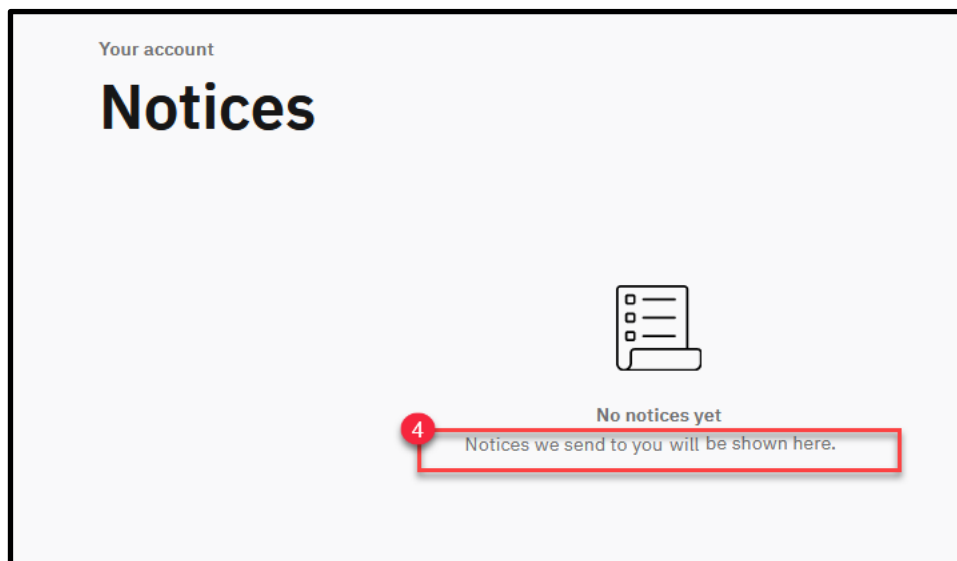


Figure 51: Notices – with notices (Modify)

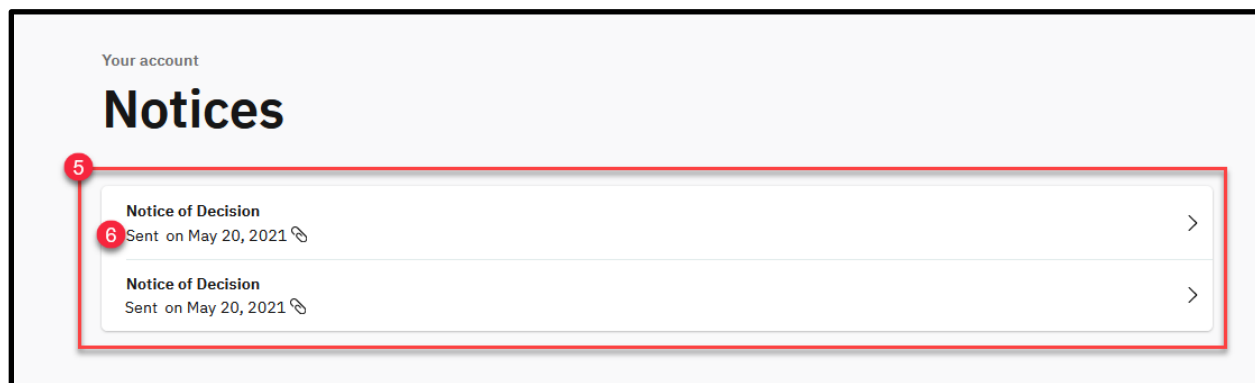
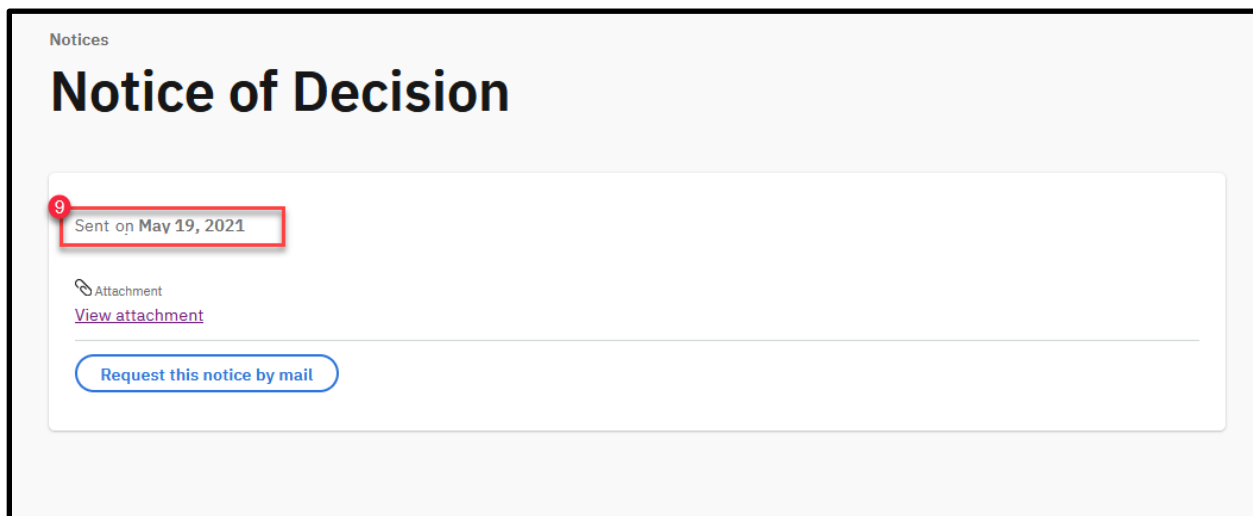




Figure 52: Notices – Viewing a Notice (Modify)



5.4.10.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online COC - General.xlsx	Notices

5.5 (Online COC) Online Forms

The Online Forms sections contains all the modifications required to support the following online forms.

- Blank Application – This blank application allows user that does not meet the criteria to obtain a prepopulated application to apply online for regular and retroactive Medical benefits. This includes
 - ◆ users without a linked account
 - ◆ users with a linked account, but is an active member in more than one case
 - ◆ users with a linked account, but is not the primary member on that case
- Prepopulated Application – This prepopulated application allows user that meets the criteria to obtain a prepopulated application to apply online for regular and retroactive Medical benefits. They will be able to review the existing information on their case and update as needed.



- Change of Circumstances – The Online COC form is a prepopulated form that allows the user to review and report changes.
- Renewal – The Online Renewal Form is a prepopulated form that allows Primary Members with a linked account to complete the renewal online for any member within their recertification period.

The pages within the online forms were placed within one of the following 4 categories:

- Overview Pages – These pages provide an overview of the selected online form. For applications, users are given the option to add Retroactive Medical Assistance to their application.
- Common IEG Pages – These are all the pages part of the blank application, many which are shared with the other online forms.
- Additional IEG Pages – These are pages only found within the prepopulated forms.
- Submission Pages – These are pages found at the end of online forms.

5.5.1 Application Page Flow

Below flow depicts the pages that will appear for the Application for the Government Health Plan in the Citizen Portal. The gray colored boxes identify the pages that were modified from OOTB or newly created.



I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Figure 53: Blank Application Page Flow

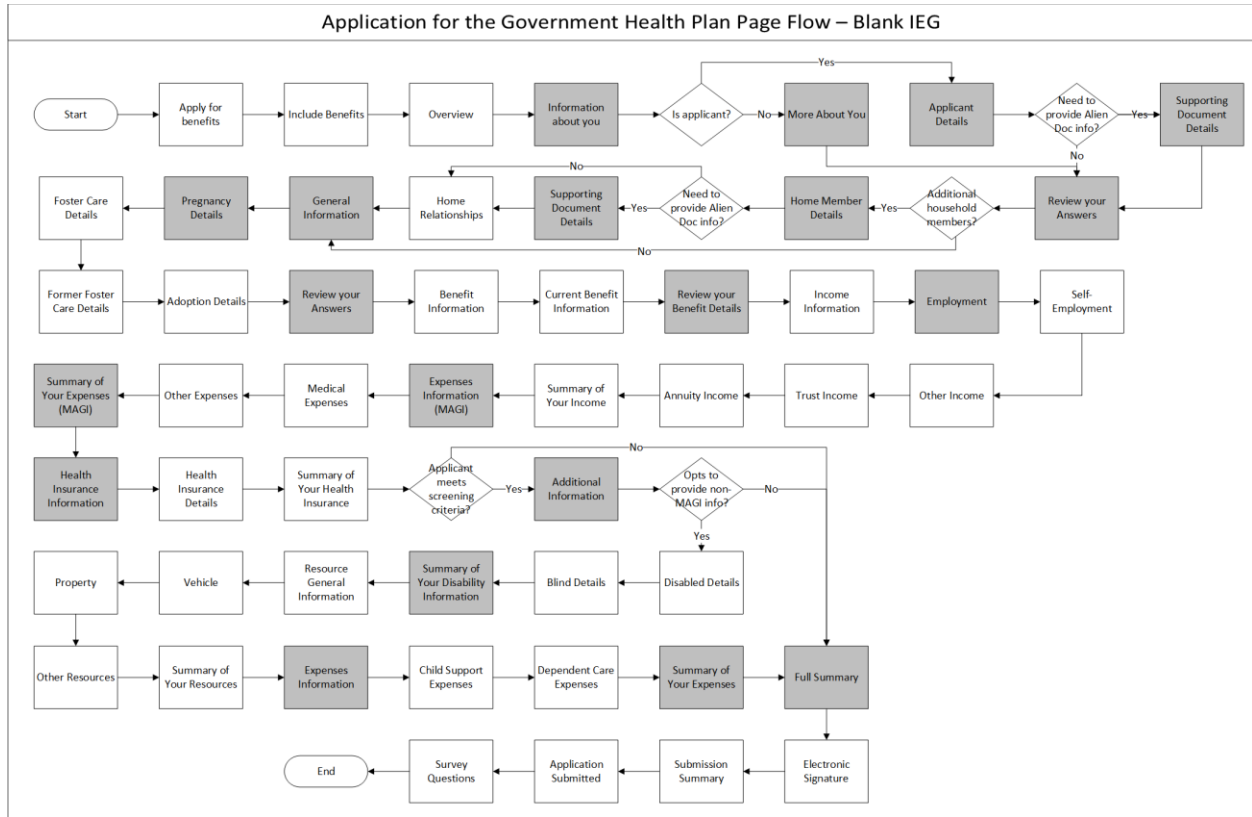
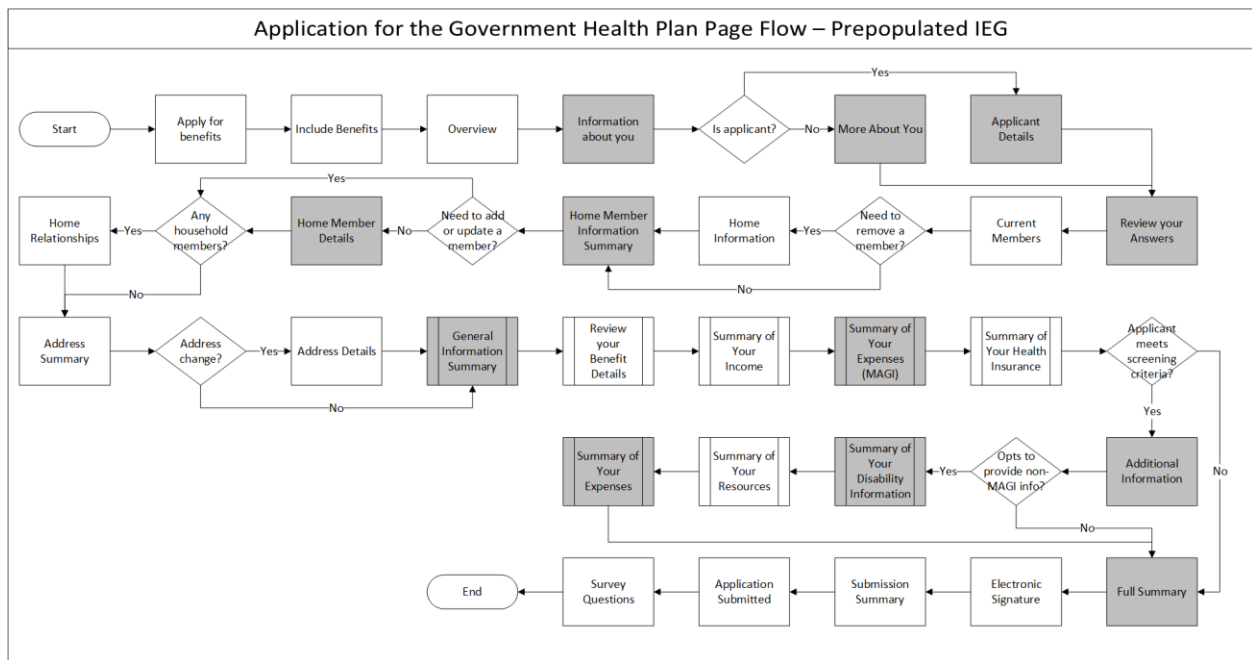


Figure 54: Prepopulated Application Page Flow





I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Figure 55: Prepopulated Renewal Form Page Flow

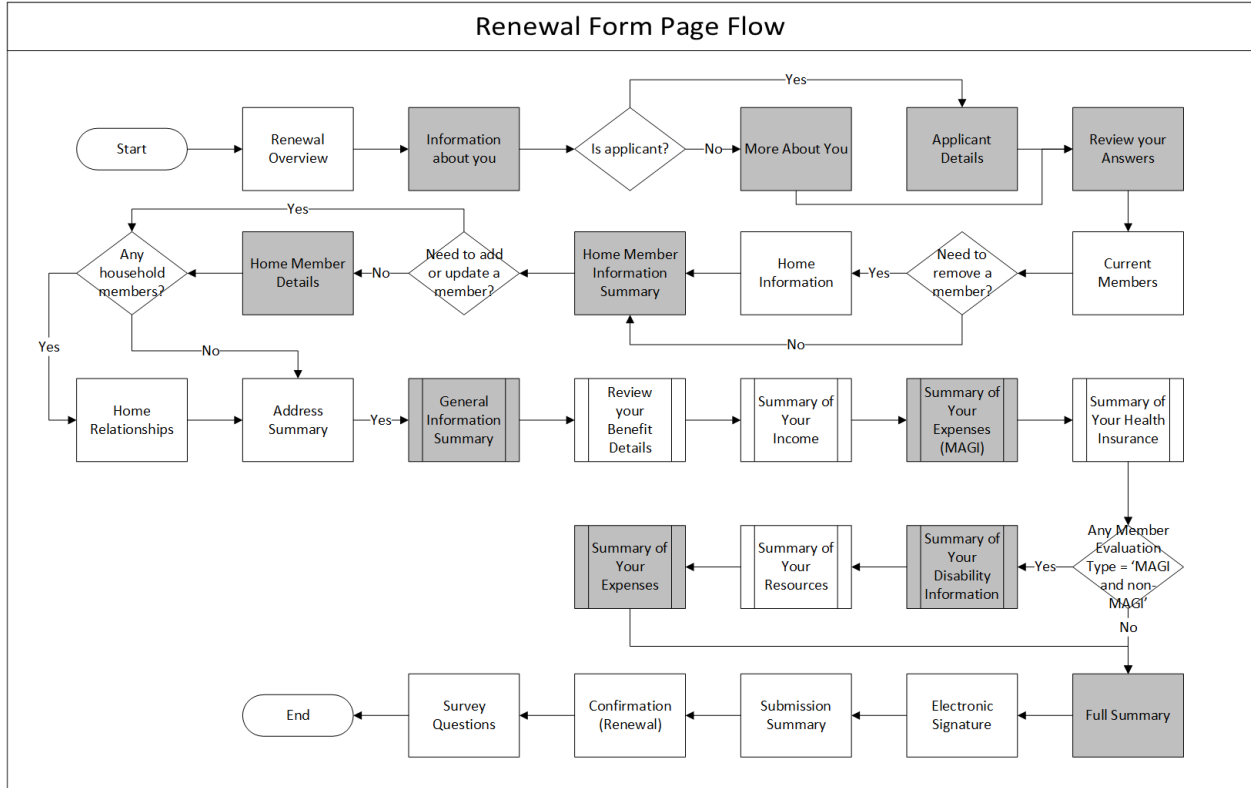


Figure 56: Prepopulated COC Form Page Flow – Primary Member

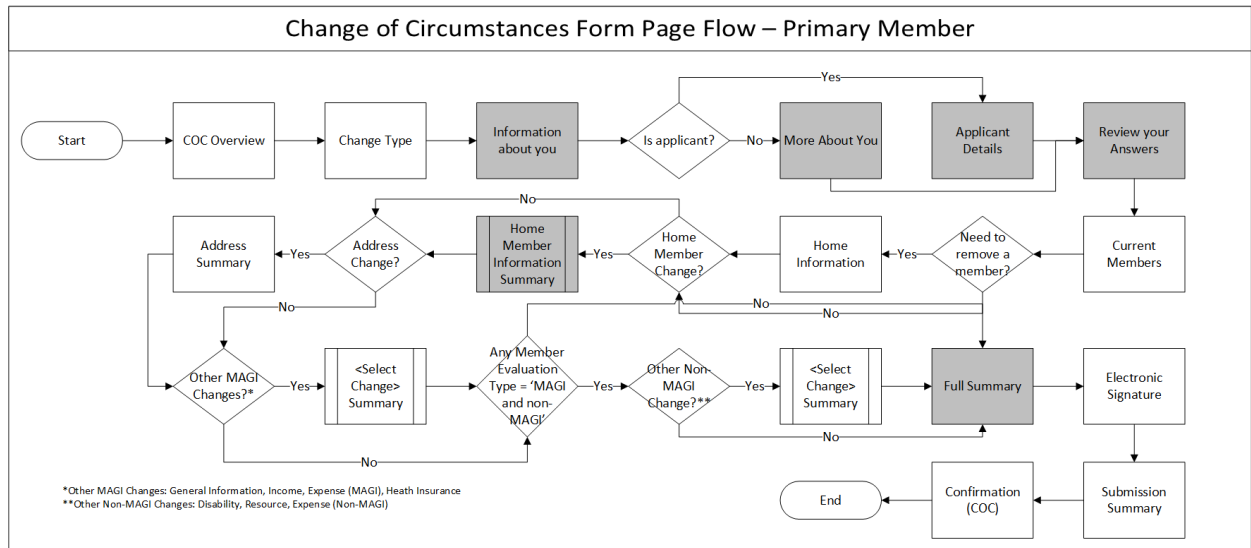
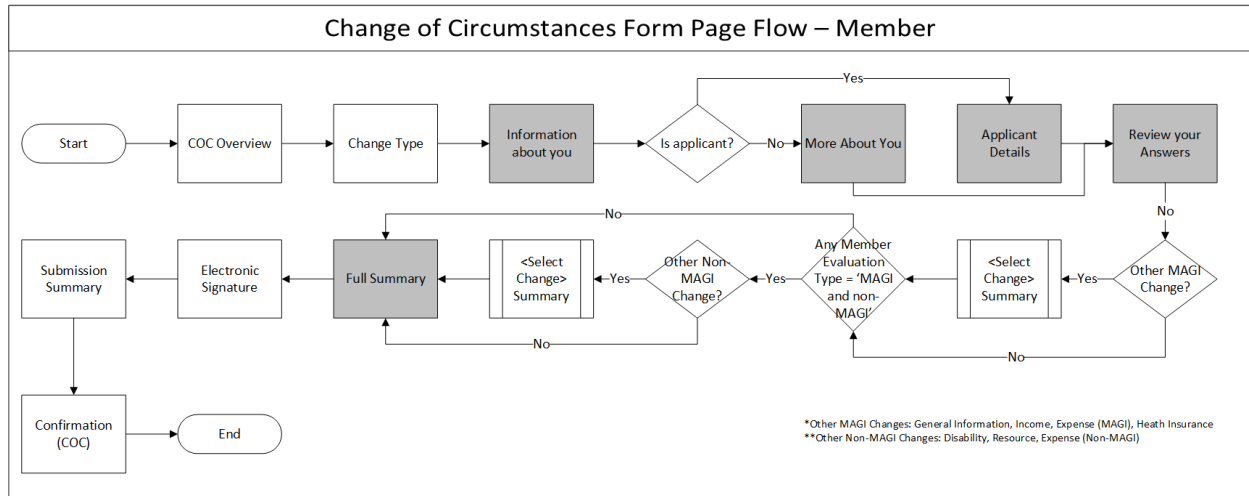




Figure 57: Prepopulated COC Form Page Flow –Member



5.5.2 Prepopulating Criteria

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

Table 5: Prepopulating Criteria

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



5.5.3 Submission Instructions

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

Table 6: Effective Date Rules for Online Changes

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

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

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

<PRMO-445>

2. Setting the Evaluation Type during the application or renewal process:
 - a. If the applicant/beneficiary does not opt to provide non-MAGI information, set the Evaluation Type for all applicants/beneficiaries to "MAGI only".
 - b. If the applicant opts to provide non-MAGI information AND go through ALL the pages of the non-MAGI section of the application then submits the application, set the Evaluation Type for all applicants to "MAGI and non-MAGI".



- c. If the applicant opts to provide non-MAGI information but then submits the application before responding to all the questions within the non-MAGI portion, set the evaluation type for all applicants to "MAGI only".
 - d. If the beneficiary opts to provide non-MAGI information AND go through ALL the pages of the non-MAGI section of the Online Renewal Form then submits, set the Evaluation Type for all beneficiaries to "MAGI and non-MAGI".
 - e. If the beneficiary opts to provide non-MAGI information but then submits the Online Renewal Form before responding to all the questions within the non-MAGI portion, set the evaluation type for all beneficiaries to "MAGI only".
3. The responses to the revised questions 'Is anyone applying for benefits blind?' and the 'Is anyone applying for benefits disabled?' are used to set the Application Timer. Refer to the Timer sections within the Intake Application Processing FDD for additional details on setting the application timer.

<PRMO-446>

4. Setting the Household Member Start Date:
- a. When FormType = BlankApp AND the question did NOT display, set Household Member Start Date to be the 1st of the application month.
 - b. When FormType = BlankApp AND the question did display, set Household Member Start Date per entered date.
 - c. When FormType = PrepopApp AND the question did NOT display, do not update the Household Member Start Date.
 - d. When FormType = PrepopApp AND the question did display, update the Household Member Start Date per entered date.
5. Setting the non-applying Household Member's Living Arrangement Start Date and Type:
- a. For household members that are not applying for health benefits, default the Living Arrangement Start date to that of the Primary applicant; if the household member's DOB is later than Primary applicant Living Arrangement Start Date then default the Living Arrangement Start Date to the household member's DOB.
 - b. For household members that are not applying for health benefits, default the Living Arrangement Type to that of the Primary applicant.

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6. Setting the Estimated Delivery Date:



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

- a. If the Estimated Delivery Date is entered this will be the date that is used to assess the postpartum period. If the date is left blank, then calculation should be "Start Date" + 9 months.
 - i. For Applications: Start date is equal to the application date;
 - ii. COC: Start date is equal to the date the change is reported;
 - iii. Renewal: Start date is equal to the date the change is reported.

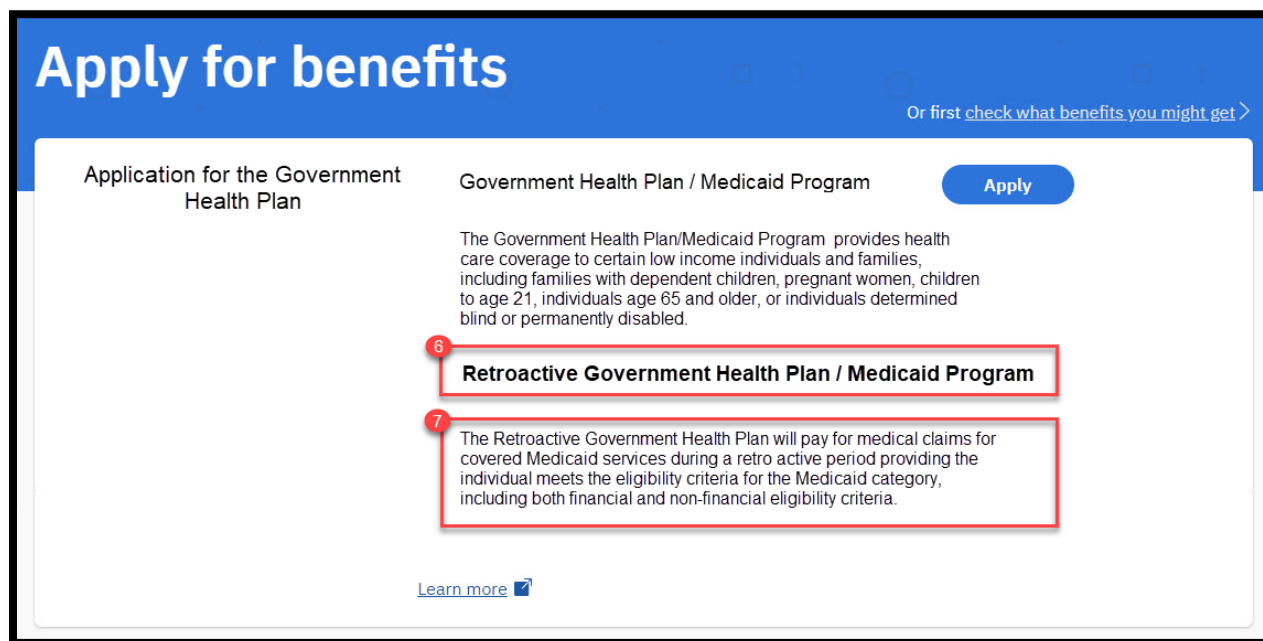
5.5.4 (Online COC) Overview Pages

5.5.4.1 (Online COC) Apply for benefits

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

5.5.4.1.1 <PRMO-1561> Screenshot (Modify)

Figure 58: Apply for benefits



5.5.4.1.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Overview Pages.xlsx	Apply for benefits

5.5.4.2 (Online COC) Include Benefits

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

5.5.4.2.1 Screenshot (New)

Figure 59: Include Benefits

5.5.4.2.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Overview Pages.xlsx	Include Benefits

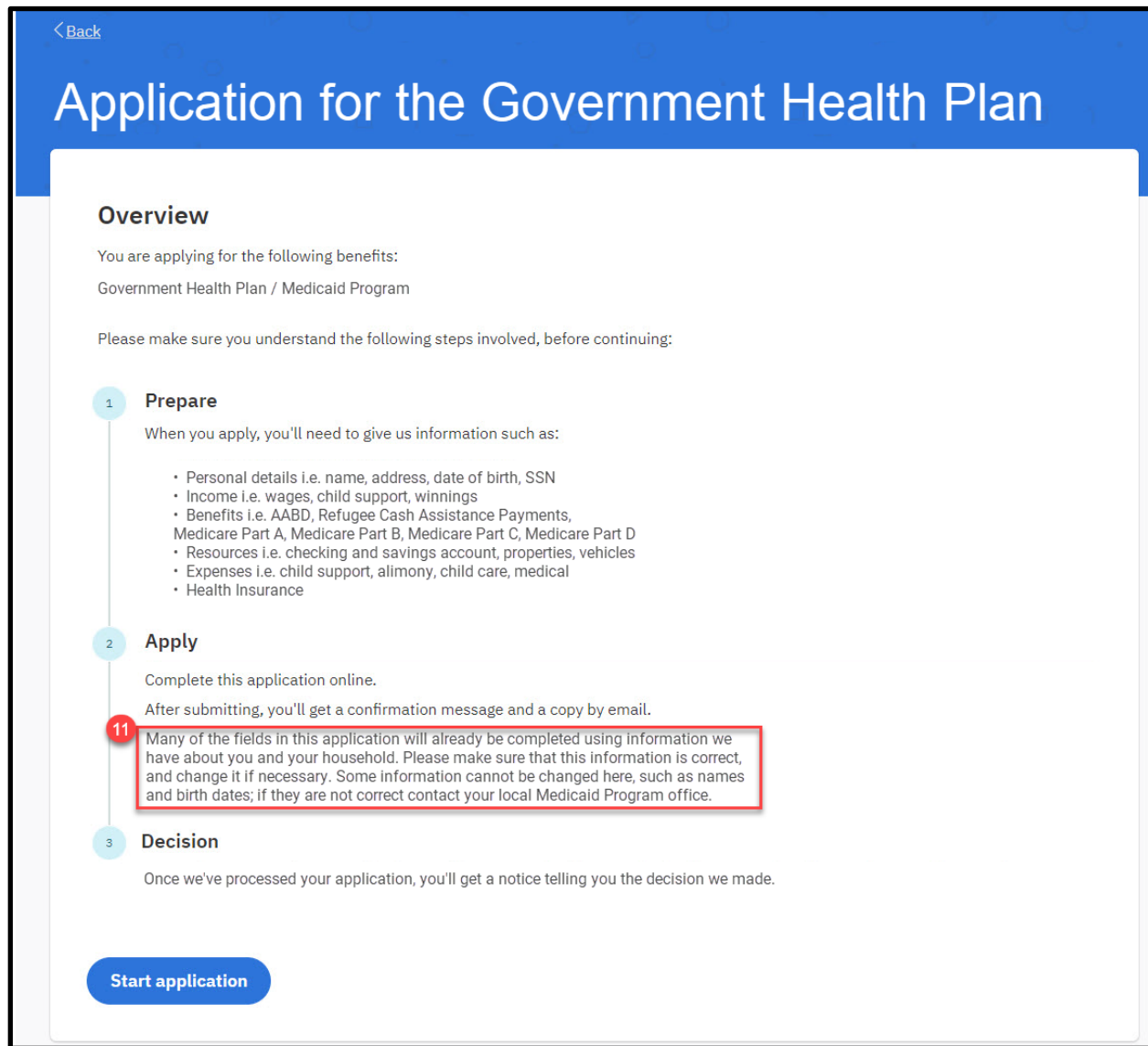
5.5.4.3 (Online COC) Application Overview

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



5.5.4.3.1 Screenshot (Modify)

Figure 60: Application Overview - Prepopulated



5.5.4.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Overview Pages.xlsx	Application Overview



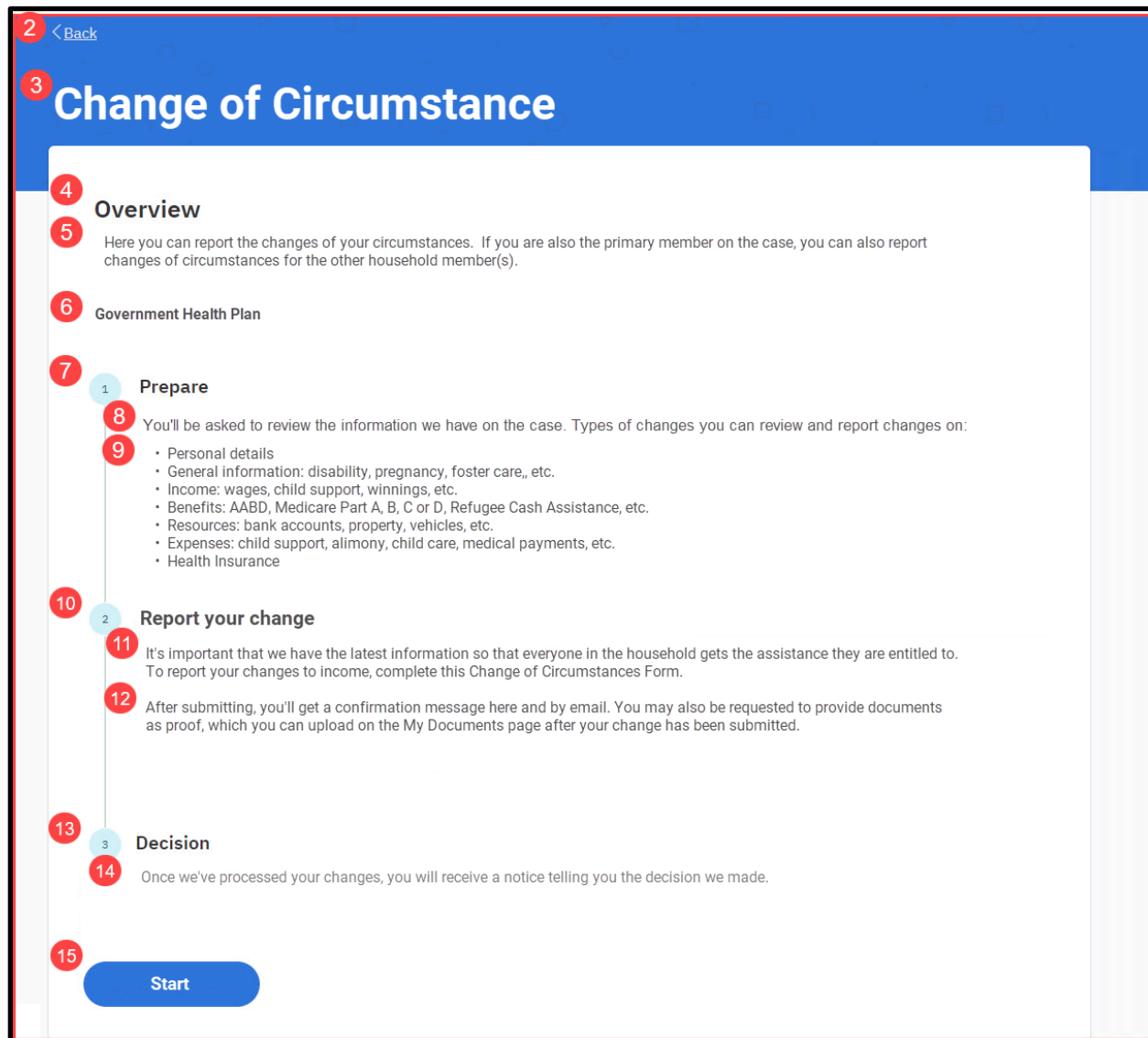
5.5.4.4 (Online COC) COC Overview

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



5.5.4.4.1 Screenshot (New)

Figure 61: COC Overview



5.5.4.4.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Overview Pages.xlsx	COC Overview

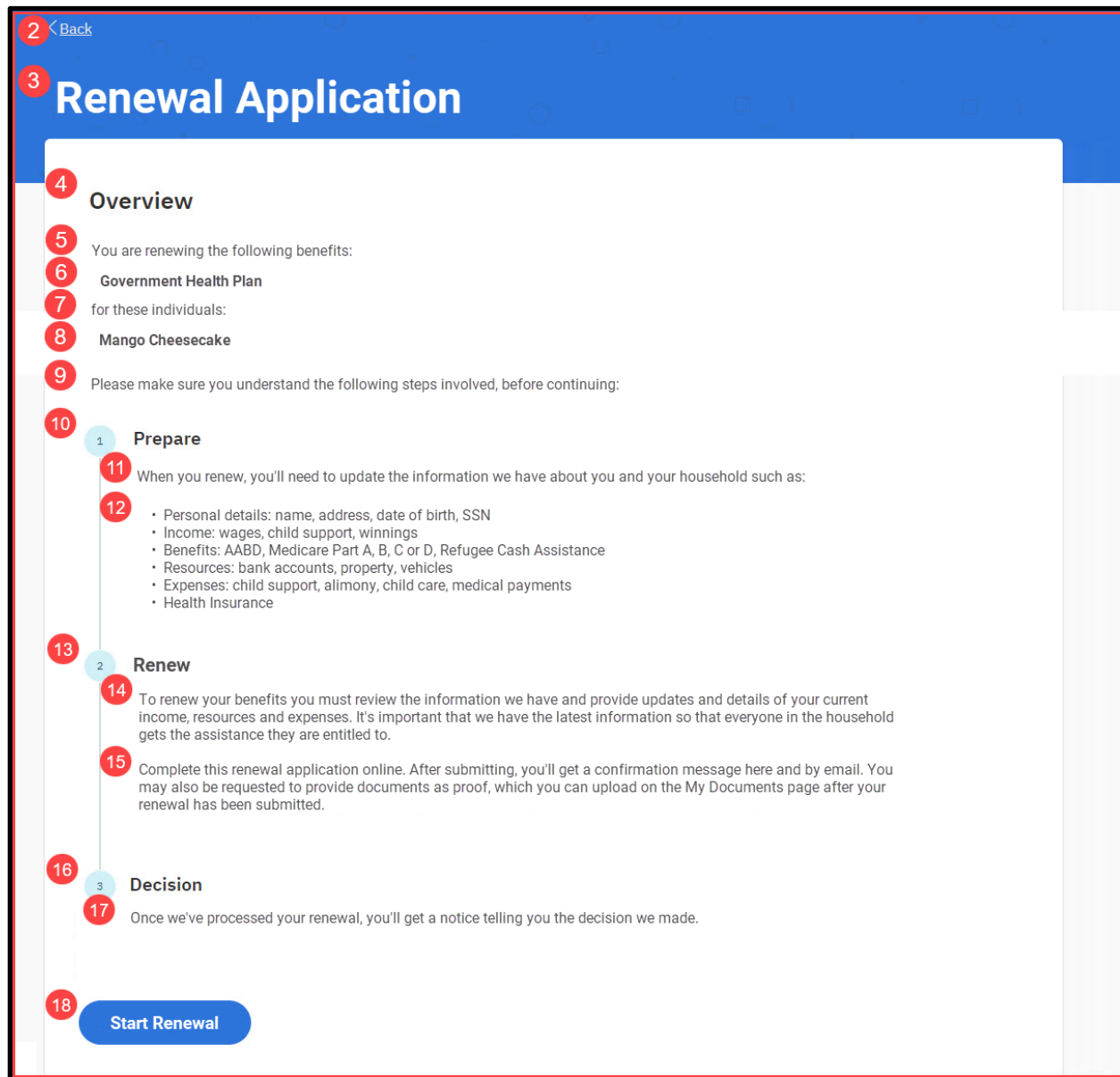
5.5.4.5 (Online COC) Renewal Overview

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



5.5.4.5.1 Screenshot (New)

Figure 62: Renewal Overview



5.5.4.5.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Overview Pages.xlsx	Renewal Overview

5.5.5 (Online COC) Common IEG Pages

5.5.5.1 (Online COC) Information About You

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



5.5.5.1.1 Screenshot (Modify)

Figure 63: Information About You <CR189> <PR-14507>



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Home phone number: Optional

Work phone number: Optional

Cell phone number: Optional

Other phone number: Optional

Email

Email address: Optional

Help paying for your health benefits [? Help](#)

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

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

Next

5.5.5.1.2 Description of Modifications and Additions

Details located in:



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

Document	Tab Name
Online Application Common Pages.xlsx	Information about you



5.5.5.2 (Online COC) More About you

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

5.5.5.2.1 Screenshot (Modify)

Figure 64: More About You – Non-Applicant <PRMO-446>



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More About You

Additional Information

Because Sheila isn't applying for health Insurance, you may provide a social security number (SSN) if he/she has one. It's optional. We'll use this SSN to check income. This can speed up the decision about whether household members get help paying for insurance.

5 Social Security Number (SSN): Optional

7 Date of birth: DD/MM/YYYY

01/01/1995

Gender:

Female

Gender identity: Optional

--Please Select--

What language do you wish to be contacted in? Optional

--Please Select--

43 Are you a police officer of the commonwealth?

--Please Select--

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

--Please Select--

Where You Live

Describe your residency in Puerto Rico.

--Please Select--

Where do you live?

--Please Select--

When did you start living here?

DD/MM/YYYY

18 Is <Sheila> an American Indian/Alaska Native?

--Please Select--

[Next](#)

5.5.5.2.2 Description of Modifications and Additions

Details located in:



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

Document	Tab Name
Online Application Common Pages.xlsx	More About You



5.5.5.3 (Online COC) Applicant Details

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

5.5.5.3.1 Screenshot (Modify)

<PRMO-448> Figure 65: Applicant Details – No SSN Instructions

The screenshot shows the 'Applicant Details' form. At the top, there is a '< Back' link and the title 'Applicant Details'. Below the title, it says 'Please enter your details.' The form is divided into sections. The first section is 'Personal Details' with a 'Help' icon. The first question is 'Do you have a Social Security Number (SSN)?' with a dropdown menu set to 'No'. The second question is 'If you have no SSN, have you applied for one?' with a dropdown menu set to '--Please Select--'. A red callout box with a '70' icon contains the following text: 'We use SSNs to check income and other information to see who's eligible for health coverage. For more information on getting an SSN, visit [socialsecurity.gov](https://www.socialsecurity.gov) or call 1-800-772-1213. TTY users should call 1-800-325-0778 or visit your local PR Medicaid office, and they can assist you in applying for one.' Below this, there is a 'Date of birth:' field with a prepopulated value of '01/01/1990' and a calendar icon. The 'Gender:' field is prepopulated with 'Female'.

Figure 66: Applicant Details – SSN and DOB Known <PRMO-452><PRMO-446><PRMO-445>



Applicant Details

Please enter your details.

Personal Details

Do you have a Social Security Number (SSN)?

Yes

Social Security Number (SSN):

435689064

Date of birth:

DD/MM/YYYY

01/01/2001



Gender:

Female

Gender identity: Optional

Female

Marital status:

Single

What language do you wish to be contacted in? Optional

Spanish

Are you a police officer of the Commonwealth?

No

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

Not Relative to a Police



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Have you been emancipated by a court order?

No

What is your citizenship status?

U.S. Citizen

71 Are you a naturalized or derived citizen?

--Please Select--

Are you the sponsor of an immigrant? Optional

--Please Select--

What is your veteran status?

No Service

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

01/01/2021

Where You Live

Describe your residency in Puerto Rico.

Permanently residing in Puerto Rico

Where do you live?

Home

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

01/01/2021



Race and Ethnicity ? Help

76 Is <Sheila> an American Indian/Alaska Native?

--Please Select--

44 Please check the boxes to tell us about your race and/or ethnic origin. If you do not wish to answer the question, select 'Decline to Answer'.

- Black or African American
- Asian
- Hawaiian or Pacific Islander
- White or Caucasian
- Asian Indian
- Chinese
- Filipino
- Japanese
- Korean
- Vietnamese
- Asian Unknown
- Native Hawaiian
- Guamanian or Chamorro
- Samoan
- Other Pacific Islander
- Other
- Decline to Answer

Ethnicity Optional

--Please Select--

Next



5.5.5.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Applicant Details

5.5.5.4 <PRMO-452> Supporting Document Details

The 'Supporting Document Details' page gathers additional information about the supporting documents related to a person alien, naturalized citizen, and derived citizen status.

Each document type has its own Supporting Document Details page view. Below is one example.

5.5.5.4.1 Screenshot (Modify)

Figure 67: Supporting Document Details

5.5.5.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Supporting Document

5.5.5.5 Review your Answers (About you)

The 'Review your Answers' page for the 'About You' section of the application presents a summary of the answers provided to questions from the previous pages of the application. Modifications made to the OOTB version reflect the changes made to previous pages in About You.



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Supporting document details

2 I-94 (Arrival/Departure Record) has been selected to be the supporting document for the status of being a Lawful Alien, naturalized citizen or derived citizen. Please provide the below information as available in the document. Please enter the Name and Date of Birth if different from what is already entered in the Application Information.

I-94 Number Optional

SEVIS ID Optional

Document Expiration Date Optional
DD/MM/YYYY

First Name Optional

Middle Name Optional

Last Name Optional

Date of Birth Optional
DD/MM/YYYY

Additional Information

Optional

Next

5.5.5.5.1 Screenshot (Modify)

Figure 68: Review your Answers (About you) – Applicant <PR-14507>



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Review your Answers

Here is a summary of what you have told us about your situation. If you would like to change your answers click 'Change'!

Name

First name: Sheila	5 Middle name: --	Last name: Coswell	Change
7 Second last name: --			

Addresses

Street 1: 8899 Main Street	Street 2: --	City: PUERTA DE TIERRA	Change
State: Puerto Rico	Zip: 00906	91 Neighborhood: Cupey	

Is your mailing address the same as your residential address?
Yes

Contact Details

Home phone number:	Work phone number:	Cell phone number:	Change
Other phone number:			

Email

Email address: --	Change
----------------------	------------------------



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Personal Details ^

Social Security Number (SSN): 812335162	If you have no SSN, have you applied for one? --	Reason why you don't have a SSN --	Change
Date of birth: 1/1/1995	Marital status: Single	Gender: Female	
What language do you wish to be contacted in? --	Police officer: No	Relative of absent police officer: Not Relative to a Police	
Emancipated by a court order: No	Are you the sponsor of an immigrant? --	Citizenship status: Alien	
Alien status: Cuban/Haitian Entrant	Do you have a sponsor? No	Date of Entry 1/1/2017	
Country/Region of Origin Cuba			
Veteran Status: No Service	When did you become a member of the household? 1/1/1995		

Where You Live ^

Describe your residency in Puerto Rico. Permanently residing in Puerto Rico	Where do you live? Home	When did you start living here? 1/1/1995	Change
--	----------------------------	---	------------------------

<CR147>



I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Race and Ethnicity ^

<p>Black or African American No 96</p> <p>Hawaiian or Pacific Islander No 98</p> <p>Chinese No 121</p> <p>Korean No 124</p> <p>Native Hawaiian No 127</p> <p>Other Pacific Islander No 130</p> <p>Ethnicity --</p>	<p>American Indian or Alaskan Native -- 96</p> <p>White or Caucasian No 122</p> <p>Filipino No 122</p> <p>Vietnamese No 125</p> <p>Guamanian or Chamorro No 128</p> <p>Other No</p>	<p>Asian No 120</p> <p>Asian Indian No 123</p> <p>Japanese No 123</p> <p>Asian Unknown No 128</p> <p>Samoan No 129</p> <p>Decline to Answer Yes</p>
--	--	--

[Change](#)

Help paying for your health benefits ^

<p>Do you want to find out if you can get help paying for your health benefits? Yes 108</p>	<p>If eligible, do you have a preferred Managed Care Organization (MCO)? -- 111</p>
--	--

[Change](#)

People in Your Home ^

Is there anyone else in the household?
Yes

Next

Figure 69: Review your Answers (About you) – Non-Applicant <PRMO-446>



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Review your Answers

Here is a summary of what you have told us about your situation. If you would like to change your answers click 'Change'.

Name

First name:
Sheila

5 Middle name:
--

Last name:
Coswell

[Change](#)

7 Second last name:
--

Addresses

Street 1:
8899 Main Street

Street 2:
--

City:
PUERTA DE TIERRA

[Change](#)

State:
Puerto Rico

Zip:
00906

91 Neighborhood:
Cupey

Is your mailing address the same as your residential address?
Yes

Contact Details

Home phone number:

Work phone number:

Cell phone number:

[Change](#)

Other phone number:

Email

Email address:
--

[Change](#)



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Personal Details

40	Social Security Number (SSN): 812335162	43	Date of birth: 1/1/1995	45	Gender: Female	Change
46	What language do you wish to be contacted in? --	47	Police officer: No	48	Relative of absent police officer: Not Relative to a Police	
61	Veteran Status: No Service	58	Date of Entry 1/1/2017			

Where You Live

	Where do you live? Home	89	When did you start living here? 1/1/1995	Change
--	----------------------------	----	---	------------------------

Race and Ethnicity

96	American Indian or Alaskan Native No	Change
----	---	------------------------

Help paying for your health benefits

109	Do you want to find out if you can get help paying for your health benefits? No	111	If eligible, do you have a preferred Managed Care Organization (MCO)? --	Change
-----	--	-----	---	------------------------

People in Your Home

Is there anyone else in the household?
Yes

[Next](#)

5.5.5.5.2 Description of Modifications and Additions

Details located in:



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

Document	Tab Name
Online Application Common Pages.xlsx	Review your Answers (About you)



5.5.5.6 (Online COC) Home Member Information

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

5.5.5.6.1 Screenshot (Modify)

Figure 70: Home Member Information – Applicant <PRMO-446> <PRMO-448><PRMO-452><PR-14507>

Displaying verbiage when "Does this person have a Social Security Number (SSN)? = "No"



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Gender:

Male

Gender Identity Optional

Male

Marital status:

Married

Is this person a police officer of the Commonwealth?

No

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

Not Relative to a Police

Has this person been emancipated by a court order?

No

What is this person citizenship status?

U.S. Citizen

73 **Is this person a naturalized or derived citizen?**

--Please Select--

Is this person the sponsor of an immigrant? Optional

--Please Select--

What is this person veteran status?

No Service

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

01/01/2021



Where You Live

Describe this person's residency in Puerto Rico.

Permanently residing in Puerto Rico



Where does this person live?

Home



When did this person start living here?

DD/MM/YYYY

01/01/2021





I.4.2.p.ii Completed Citizen Mobile App
I.4.2.I.ii Completed Medicaid Application - Citizen Portal

Race and Ethnicity

76 Is <Person's First Name> an American Indian/Alaska Native?
--Please Select--

41 Please check the boxes to tell us about this person's race and/or ethnic origin. If you do not wish to answer the question, select 'Decline to Answer'.

- Black or African American
- Asian
- Hawaiian or Pacific Islander
- White or Caucasian
- Asian Indian
- Chinese
- Filipino
- Japanese
- Korean
- Vietnamese
- Asian Unknown
- Native Hawaiian
- Guamanian or Chamorro
- Samoan
- Other Pacific Islander
- Other
- Decline to Answer

Ethnicity Optional
--Please Select--

Next

Figure 71: Home Member Information – Non-Applicant <PRMO-448> <PR-14507>



Home Member Information

Your household

Strawberry
Age 20

Banana
Age 23

Tell us about Banana, age 23

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

Person Details

First name:

Banana

Middle name: Optional

Last name:

Cheesecake

Second last name: Optional

Is this person's address same as Primary Client's address?:

Does this person have a Social Security Number (SSN)?

No

71

We use SSNs to check income and other information to see who's eligible for health coverage. For more information on getting an SSN, visit socialsecurity.gov or call 1-800-772-1213. TTY users should call 1-800-325-0778 or visit your local PR Medicaid office, and they can assist you in applying for one.

Date of birth:

DD/MM/YYYY

01/01/1998





I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Gender:

Gender Identity Optional

Marital status:

Is this person a police officer of the Commonwealth?

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

Is <Person's First Name> an American Indian/Alaska Native?

5.5.5.6.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Home Member Information

5.5.5.7 Home Relationships

The 'Home Relationships' page allows the applicant to specify the relationship between each member of the household. Changes include additional relationship start date and relationship to previous caretaker questions.



5.5.5.7.1 Screenshot (Modify)

Figure 72: Home Relationships

Home Relationships

Your household

Stawberry
Age 20

Banana
Age 20

Tell us about Stawberry, age 20

3 Please tell us how the members of your home are related to one another. Then tell us if the member is the caretaker for each person, including members who are both the parent and caretaker of another member. Also tell us if a member is the widow(er) or divorcee of a person who previously was the caretaker of another member.

4 What is Strawberry (20) to Banana (20)
--Please Select--

5 When did this relationship begin?
DD/MM/YYYY

6 Is Strawberry the caretaker of Banana?
--Please Select--

7 Is Strawberry the widow(er) or divorcee of Banana's previous caretaker?
--Please Select--

Next

5.5.5.7.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Home Relationships



5.5.5.8 Absent Parent Information

The 'Absent Parent Information' page allows the applicant to specify whether any children in the household have an absent or deceased parent. Changes have been made to title and descriptive text only.

5.5.5.8.1 Screenshot (Remove)

~~Figure 73: Absent Parent Information~~

5.5.5.8.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Absent Parent Information
Online Application Common Pages.xlsx	TOC

5.5.5.9 Absent Parent Details

The 'Absent Parent Details' page allows the applicant to provide information about an absent or deceased parent. This page will be displayed for each absent parent. Changes have been made to the title text, new name fields have been added, and the Child Care Enforcement question has been removed.

5.5.5.9.1 Screenshot (Remove)

~~Figure 74: Absent Parent Details~~

5.5.5.9.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Absent Parent Details
Online Application Common Pages.xlsx	TOC



5.5.5.10 General Information

The 'General Information' page collects information about members of the household, allowing the applicant to indicate circumstances such as pregnancy or disability. If needed, additional information will then be requested on later pages. Changes have been made to pregnancy question text, and new fields for foster care and adoption have been added.



5.5.5.10.1 Screenshot (Modify)

Figure 75: General Information <PRMO-445>

<CR157>



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

11 Is anyone applying for benefits currently in foster care?

12 Please check the box for anyone who is currently in foster care:
 Strawberry
 Banana

13 Was anyone applying for benefits in foster care and is currently the age of 21 - 26?

14 Please check the box for anyone who was in foster care:
 Strawberry
 Banana

15 Is anyone applying for benefits currently in an adoption program?

16 Please check the box for anyone who is currently in an adoption program:
 Strawberry
 Banana

[Next](#)

5.5.5.10.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	General Information

5.5.5.11 <PRMO-449> Pregnancy Details

The 'Pregnancy Details' page allows the applicant to provide additional information about a household member's pregnancy such as the due date. Modifications were made to this page to clarify the current pregnancy status and remove the Medicaid enrollment question.



5.5.5.11.1 Screenshot (Modify)

Figure 76: Pregnancy Details <PRMO-449>

5.5.5.11.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Pregnancy Details



5.5.5.12 Foster Care Details

The 'Foster Care Details' page allows the applicant to provide additional information about a household member who is currently in foster care. This page is new.

5.5.5.12.1 Screenshot (New)

Figure 77: Foster Care Details

5.5.5.12.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Foster Care Details



5.5.5.13 Former Foster Care Details

The 'Former Foster Care Details' page allows the applicant to provide additional information about a household member's prior foster care situation when they were in foster care with Administración de Familias y Niños (ADFAN) on their 21st birthday. Modifications were made to this page to clarify that this applies to the situation on their 21st birthday and to remove fields which are not needed.



5.5.5.13.1 Screenshot (Modify)

Figure 78: Former Foster Care Details

5.5.5.13.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Former Foster Care Details



5.5.5.14 Adoption Details

The 'Adoption Details' page allows the applicant to provide additional information about a household member who is currently in an adoption program. This page is new.

5.5.5.14.1 Screenshot (New)

Figure 79: Adoption Details

5.5.5.14.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Adoption Details



5.5.5.15 Review your Answers (Your home)

The 'Review your Answers' page for the 'Your Home' section of the application presents a summary of the answers provided to questions in this section. Modifications made to the OOTB version reflect the changes made to previous home member pages.



5.5.5.15.1 Screenshot (Modify)

Figure 80: Review your Answers (Your home) – Applicants <PRMO-445> <PRMO-449> <PR-14507>

[< Back](#)

Review your Answers

2 Here is a summary of what you have told us about your situation. If you would like to change your answers click 'Change'.

Other Home Members

First Name	Middle Name	Last Name	Second Last Name	Change	Remove
Freddie		O'conner			
	Gender	Date of Birth	Citizenship status		
	Male	1/1/2017	U.S. Citizen		
	11 Alien Status	12 Date of Entry	13 Applying for health benefits		
	Yes				
	15 MCO	16 SSN	17 Applied for SSN		
	465889132				
	18 Reason for no SSN	19 Marital Status	20 Police officer		
	Single		No		
	21 Relative of absent police officer	Emancipated by a court order	Veteran Status	23	
	Not Relative to a Police	No	No Service		
	24 Resident of Puerto Rico	Where do you live?	When did this person start living here?	26	
	Permanently residing in Puerto Rico	Home	1/1/2017		

+ Add



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Home Relationships

Constance Change

Freddie
is the Parent (Parent, Adopted, Step-Parent) of
Caretaker
Yes 31

Widow(er) or divorcee of previous caretaker
No 32

Blind Details

First Name
Freddie 57
58

+ Add...

Disability Details

First Name
Freddie 61
62

+ Add...



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

66 Pregnancy Details ^

67 Member Name	68 Number of children	69 Estimated Delivery Date	70 Pregnancy End date	Change	Remove
Constance	1	5/1/2022			

[+ Add...](#)

72 Foster Care Details ^

73 First Name	74 State	75 Foster Care Notification Type	Change	Remove
Freddie	Puerto Rico	Title IV-E Foster Care Notification		

[+ Add...](#)

76 Former Foster Care Details ^

First Name	State	Enrolled	Change	Remove
Constance	Puerto Rico	No		

[+ Add...](#)

82 Adoption Details ^

83 Adoption agreement type	84 Start Date	Change	Remove
Title IV-E Adoption Agreement	1/1/1996		

[+ Add...](#)

[Next](#)



**Figure 81: Review Your Answers (Your Home) Non-Applicant
<PRMO-446> <PR-14507>**

[< Back](#)

Review your Answers

2 Here is a summary of what you have told us about your situation. If you would like to change your answers click 'Change'.

Other Home Members

First Name	Middle Name	Last Name	Second Last Name	Change	Remove
Freddie		O'conner			
	Gender	Date of Birth			
	Male	1/1/2017			
		16 SSN		13 Applying for health benefits	
		465889132		Yes	
				20 Police officer	
				No	
					21 Relative of absent police officer
					Not Relative to a Police

+ Add



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Home Relationships

Constance Change

Freddie
is the Parent (Parent, Adopted, Step-Parent) of
Caretaker
Yes 31

Widow(er) or divorcee of previous caretaker
No 32

Blind Details

First Name
Freddie 57
58

+ Add...

Disability Details

First Name
Freddie 61
62

+ Add...



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

66 Pregnancy Details ^

67 Member Name Constance	68 Number of children 1	69 Estimated Delivery Date 5/1/2022	70 Pregnancy End date	Change	Remove
------------------------------------	-----------------------------------	---	------------------------------	------------------------	------------------------

+ Add...

72 Foster Care Details ^

73 First Name Freddie	74 State Puerto Rico	75 Foster Care Notification Type Title IV-E Foster Care Notification	Change	Remove
---------------------------------	--------------------------------	--	------------------------	------------------------

+ Add...

76 Former Foster Care Details ^

First Name Constance	State Puerto Rico	Enrolled No	Change	Remove
-------------------------	----------------------	----------------	------------------------	------------------------

+ Add...

82 Adoption Details ^

83 Adoption agreement type Title IV-E Adoption Agreement	84 Start Date 1/1/1996	Change	Remove
--	----------------------------------	------------------------	------------------------

+ Add...

Next

5.5.5.15.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	Review your Answers (Your home)

5.5.5.16 Benefit Information

The 'Benefit information' page gathers if the user or any member in the household is receiving benefits. Modifications include changes to the page description and cluster help to cater to PREE requirements.

5.5.5.16.1 Screenshot (Modify)

Figure 82: Benefit Information

5.5.5.16.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	Benefit Information

5.5.5.17 Current Benefit Information

The 'Current Benefit' page captures the details of all the benefits the user is currently receiving including, but not limited to, Aid to the Aged, Blind, and Disabled (AABD), Refugee Cash Assistance Payments, Medicare Part A, Medicare Part B, Medicare Part C, or Medicare Part D. Modifications include changes to instruction text, cluster help, and new fields to capture benefit type, start date and state. Benefit information not required for PREE is also being removed.



5.5.5.17.1 Screenshot (Modify)

Figure 83: Current Benefit Information

Current Benefit Information

Your household

Stawberry
Age 20

Banana
Age 20

Tell us about Stawberry, age 20

You have told us that Stawberry is currently receiving benefits, please tell us what benefits Stawberry is receiving.

Current Benefit Information [? Help](#)

4 Please enter the details of the benefits Stawberry is currently receiving:

5 ? You told us earlier that someone in your home is currently receiving one or more of the following benefits: Cash Assistance to the Ages, Blind, and Disabled (AABD), Refugee Cash Assistance Payments, Medicare Part A, Medicare Part B, Medicare Part C, or Medicare Part D. Please select which benefits this person is currently receiving.

6 What type of benefit does Stawberry have?
--Please Select--

7 When did this benefit start?
DD/MM/YYYY

8 Which state is this benefit from?
--Please Select--

9 Does Stawberry have any other benefits ?
--Please Select--

Next

5.5.5.17.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	Current Benefit Information

5.5.5.18 (Online COC) Review Your Benefit Details

The 'Review your Benefit Details' page provides a summary view of the benefits the user has reported. The page allows the user to add new benefit information and change or remove existing benefit information. Modifications include changes to Page Description and Current Benefit information cluster. Other clusters present in OTB page that are not required for PREE are also being removed.



5.5.5.18.1 Screenshot (Modify)

Figure 84: Review your Benefits Details – Blank Application

Review your Benefit Details

2 Here's a summary of what you have told us about benefits you currently receive. If you would like to change your answers, please click 'Change'. If you would like to remove information for any home member, please click 'Remove'.

Current Benefit Information ^

First Name: Stawberry

Benefit Type: Medicare Part A

State: Puerto Rico

Change Remove

+ Add...

Next

Figure 85: Review your Benefits Details – Prepopulated Application

Review your Benefit Details

11 Here is the list of benefit information we have for your household. Click on 'Change' to view more details or to update a benefit. Click on 'Remove' if you no longer have the benefit. Click on 'Add' if you wish to add a benefit.

Current Benefit Information ^

No information entered

+ Add...

Next



5.5.5.18.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Review your Benefits Details

5.5.5.19 Income Information

The 'Income Information' page gathers income from employment, self-employment, and other income sources that the primary applicant or any member in the household has. Modifications include changes to cluster help, questions related to employment, self-employment, and other income. New questions have been added to capture income from Trusts and Annuities. OOTB questions not relevant to PREE have also been removed.



5.5.5.19.1 Screenshot (Modify)

Figure 86: Income Information

Income Information

Please tell us about the people in your home who have jobs, are self-employed or receive income.

Income Information [? Help](#)

4 [?](#) Is anyone currently employed or has anyone recently lost a job?
Please tell us if anyone in your home has a job. By this we mean anyone who has a paid employment and receives a salary or wages. If yes, please select the people who have a job.
Is anyone in your home self-employed?
Please tell us if anyone in your home is self-employed. A self-employed person may have their own business, or may provide services for which they get paid. Examples of self-employed people are: Business Owners, Landlords, Builders, Grocers, Carpenters, Child Careers, etc.
Does anyone in your home have any other income?
Please tell us if anyone in your home has any other income. Other income is any income that a person receives that is not paid income for a job or self-employment. For example if the person is receiving child Care, you should select yes for this question. Examples of other income include bingo/gambling winnings, SSI, pensions/retirement, royalties, compensation, unemployment benefits, dividends/interest, child Care, spousal Care/alimony, cash from relatives or friends, rental income, veteran's benefits etc.
Does anyone in your home expect to receive any money in this month or the next month?
Please tell us in anyone in your home expects to receive money in this month or in the next month. Types of income include bingo/gambling winnings, SSI, pensions/retirement, royalties, compensation, unemployment benefits, dividends/interest, child Care, spousal Care/alimony, cash from relatives or friends, rental income, veteran's benefits etc.

5 Is anyone currently employed or has anyone recently lost a job within the last 3 months?
Yes

Please check the box for anyone who has a job:
 Strawberry
 Banana

7 Is anyone in your home currently self-employed or was self-employed within the last 3 months?
Yes

Please check the box for anyone who is self-employed:
 Strawberry
 Banana



I.4.2.p.ii Completed Citizen Mobile App
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9 Is anyone currently employed or has anyone recently lost a job within the last 3 months?

Yes

Please check the box for anyone who has other income:

Strawberry

Banana

15 Is anyone in your home currently a beneficiary of a trust and receiving payments from the trust or was receiving payments from the trust within the last 3 months?

Yes

Please check the box for anyone who is receiving payments from a trust:

Strawberry

Banana

17 Is anyone in the home an annuitant of an annuity and receiving payments from the annuity was receiving payments from the annuity within the last 3 months?

Yes

Please check the box for anyone who is receiving payments from an annuity:

Strawberry

Banana

Next

5.5.5.19.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Income Information



5.5.5.20 (Online COC) Employment

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

5.5.5.20.1 Screenshot (Modify)

Figure 87: <CR-170> Employment – Application with Retro Coverage

Employment

Your household

Stawberry
Age 20

Banana
Age 20

Tell us about Stawberry, age 20

From the information you have given us Stawberry is employed, please enter Stawberry's employment details below.

Employment Details [? Help](#)

Please enter the details of Stawberry's job below:

? Employment includes all income, wages, salaries, tips, or commissions from any type of work including full or part time, temporary, seasonal or migrant. You do not need to include income from self-employment, we will ask you about that next.

What is the name of Stawberry's employer?

How often is Stawberry paid?

--Please Select--

How much is Stawberry paid?

\$

When did Stawberry start this job?

DD/MM/YYYY



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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

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

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

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

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

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

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

25 If this is not a full-time or part-time employment, please select <Name> employment type.

Does Stawberry receive any tips or commissions? Optional

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

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

How often does Stawberry receive tips and commissions?

Does Stawberry have any other job?

[Next](#)



5.5.5.20.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Employment



5.5.5.21 (Online COC) Self-Employment

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

5.5.5.21.1 Screenshot (Modify)

Figure 88: Self-Employment – Application with Retro Coverage

Self-Employment

Your household

Stawberry Age 20 Banana Age 20

Tell us about Stawberry, age 20

You have told us that Stawberry is self-employed. Please tell us some more about Stawberry's self-employment.

Self-Employment Details [Help](#)

Please enter the details of Stawberry's self-employment below:

? A self-employed person is someone who works for himself/herself instead of an employer. A self-employed person may have their own business, or may provide services for which they get paid. Examples of self-employed people are: Business Owners, Landlords, Builders, Grocers, Carpenters, Child Carers, etc.

What is Stawberry's business name?

When did Stawberry's business start?
MM/DD/YYYY

How often does Stawberry receive self-employment income?

How much is Stawberry's self-employment income?

10 Was the self-employment income amount different in the last 6 months?



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How much was Strawberry's self-employment income in <Previous Month>? Optional

\$

How much was Strawberry's self-employment income in <2nd Previous Month>? Optional

\$

How much was Strawberry's self-employment income in <3rd Previous Month>? Optional

\$

14 How much was Strawberry's self-employment income in <4th Previous Month>? Optional

\$

15 How much was Strawberry's self-employment income in <5th Previous Month>? Optional

\$

16 How much was Strawberry's self-employment income in <6th Previous Month>? Optional

\$

How many hours per month does Stawberry work? Optional

If Strawberry is no longer self-employed, when was his/her last day of work? Optional
 DD/MM/YYYY

Does Stawberry have any other type of self employment?

--Please Select--

Next

5.5.5.21.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Self-Employment



5.5.5.22 (Online COC) Other Income

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

5.5.5.22.1 Screenshot (Modify)

Figure 89: Other Income – Application with Retro Coverage

The screenshot shows a mobile application interface for reporting other income. At the top, the title 'Other Income' is displayed in a blue header. Below the header, the user's household information is shown: 'Your household' with two members, 'Stawberry' (Age 20) and 'Banana' (Age 20). A prompt asks to 'Tell us about Stawberry, age 20'. A message states, 'You have told us that Stawberry has other income, please enter the details below.' The 'Other Income Details' section includes a question: 'What type of income does Stawberry have?' with a dropdown menu currently set to '--Please Select--'. Below this is another question: 'How often does Stawberry receive this income?' with a similar dropdown menu. The next question is 'How much does Stawberry receive?' with a text input field starting with a '\$' symbol. The final question is 'When did Strawberry start receiving this income?' with a date input field in DD/MM/YYYY format.



I.4.2.p.ii Completed Citizen Mobile App
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9 Did Strawberry receive a different amount in the last 6 months?

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

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

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

13 How much did Strawberry receive in <4th Previous Month>? Optional

14 How much did Strawberry receive in <5th Previous Month>? Optional

15 How much did Strawberry receive in <6th Previous Month>? Optional

If Strawberry is no longer receiving this income, when was the last payment? Optional
 DDMMYYYY

Does Strawberry have any other income?

Next

5.5.5.22.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Other Income



5.5.5.23 (Online COC) Trust Income

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

5.5.5.23.1 Screenshot (Modify)

Figure 90: Trust Income – Application with Retro Coverage

The screenshot shows a web form titled "Trust Details" with a blue header. Below the header, there are two profile cards: "Strawberry" (Age 20) and "Banana" (Age 20). A prompt asks to "Tell us about Strawberry, age 20". A message states: "From the information you have given us Strawberry is receiving a trust income. Please enter the details below." The "Trust Details" section contains the following fields:

- What is the trust type? (Dropdown menu: --Please Select--)
- What is the trust category? (Dropdown menu: --Please Select--)
- When was the trust established? (Text input field, format DD/MM/YYYY)
- What is the source of the trust's fund? (Dropdown menu: --Please Select--)
- What is the value of the trust? (Text input field with a dollar sign icon)



Grantor Details

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

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

Trust Income Details

What type of trust income type does Strawberry have?

How much does Strawberry receive?

How often does Strawberry receive this income?

When did Strawberry start receiving this income?

DD/MM/YYYY

18

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

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

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

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

22

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



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23 How much did Strawberry receive in <5th Previous Month>? Optional

\$

24 How much did Strawberry receive in <6th Previous Month>? Optional

\$

If Strawberry is no longer receiving this income, when was the last payment? Optional
 DD/MM/YYYY

Is Strawberry a beneficiary of another trust?

--Please Select-- ▾

[Next](#)

5.5.5.23.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Trust Income



5.5.5.24 (Online COC) Annuity Income

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

5.5.5.24.1 Screenshot (New)

Figure 91: Annuity Income – Application with Retro Coverage

The screenshot shows a web form titled "Annuity Details". At the top, it identifies the household as "Strawberry" (Age 20) and "Banana" (Age 20). Below this, it asks for details about Strawberry, age 20, and states that Strawberry is receiving an annuity income. The form then asks for the following details:

- What is the annuity type? (Dropdown menu: --Please Select--)
- What is the annuity category? (Dropdown menu: --Please Select--)
- When was the annuity established? (Text input field, format DD/MM/YYYY)
- What is the source of the annuities fund? (Dropdown menu: --Please Select--)
- What is the value of the annuity? (Text input field with a dollar sign icon)
- Was the annuity purchased through an insurance company or a financial institution? (Dropdown menu: --Please Select--)



Institution Details

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

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

Street 1

Street 2 Optional

City

State

Zip

Annuity Income Details

How much does Strawberry receive?

How often does Strawberry receive this income?

When did Strawberry start receiving this income?

DD/MM/YYYY

24

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

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

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



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

\$

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

\$

29 How much did Strawberry receive in <5th Previous Month>? Optional

\$

30 How much did Strawberry receive in <6th Previous Month>? Optional

\$

If Strawberry is no longer receiving this income, when was the last payment? Optional
 DD/MM/YYYY

Is Strawberry an annuitant of another annuity?

--Please Select--

5.5.5.24.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Annuity Income



5.5.5.25 Summary of Your Income

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

5.5.5.25.1 Screenshot (Modify)

Figure 92: Summary of Your Income – Prepopulated Form

Summary of Your Income

8 Here is a summary of the income information we have on file. Click on 'Review' to view more details or to make a change. Click on 'Remove' when no longer receiving the income. Click on 'Add' if you have a new source of income to report.

Employment Details 34 ? Help

34 ? Employment includes all income, wages, salaries, tips, or commissions from any type of work including full or part time, temporary, seasonal or migrant. You do not need to include income from self-employment.

First Name	Employer Name	Frequency	Review	Remove
Strawberry	Employment	Monthly	36	
Amount				
\$1,000				

+ Add...

Self-Employment Details 37 ? Help

37 ? A self-employed person is someone who works for himself/herself instead of an employer. A self-employed person may have their own business, or may provide services for which they get paid. Examples of self-employed people are: Business Owners, Landlords, Builders, Grocers, Carpenters, Child Carers, etc.

First Name	Business Name	Frequency	Review	Remove
Strawberry	My Business	Annual	39	
Amount				
\$20,000				

+ Add...



I.4.2.p.ii Completed Citizen Mobile App
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40 ? Help

Other Income Details

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

<small>First Name</small> Strawberry	<small>Type of Income</small> Bingo/Gambling Winnings	<small>Frequency</small> Once Off	42 Review Remove
<small>Amount</small> \$1,000			

+ Add...

43 ? Help

Trust Income Details

43 ? Please review the information about trust income.

<small>First Name</small> Strawberry	<small>Type of Income</small> Fruit Trust	<small>Frequency</small> Once Off	45 Review Remove
<small>Amount</small> \$45,000			

+ Add...

46 ? Help

Annuity Income Details

46 ? Please review the information about annuity income.

<small>First Name</small> Strawberry	<small>Type of Income</small> Fixed Annuity	<small>Frequency</small> Once Off	48 Review Remove
<small>Amount</small> \$1,000			

+ Add...

Next



5.5.5.25.2 Description of Modifications and Additions

Details located in:

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

5.5.5.26 Expenses Information (MAGI) (New) <PRMO-445>

The new Expenses Information page allows the claimant to identify household members that have a medical expense, pay alimony, and/or pay student loan interest.

5.5.5.26.1 Screenshot (New)

The screenshot shows the 'Expenses Information' form. At the top is a blue header with the title 'Expenses Information' (1). Below the header is a question: 'Please tell us about the people in your home who have expenses such as medical bills, student loan interest, or alimony?' (2). The form title 'Expenses Information' (3) is displayed below the question. The first question is 'Does anyone in your home have any medical expenses within the last 3 months?' (4), followed by a dropdown menu with '--Please Select--' (5). The second question is 'Does anyone in your home have any alimony expense or pay interest on student loans?' (10), followed by another dropdown menu with '--Please Select--' (11). At the bottom of the form is a blue 'Next' button (12).



5.5.5.26.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Expenses Information (MAGI)

5.5.5.27 Medical Expenses

The 'Medical Expenses' page gathers medical expense related information if the user states that he/she, or any other household member, has a medical expense. Examples of medical expenses include paying medical bills for an elderly or sick person. Modifications include making existing OOTB questions mandatory and adding a new question to gather the start date of the medical expense.



5.5.5.27.1 Screenshot (Modify)

Figure 93: Medical Expenses

Medical Expenses

Your household

Strawberry
Age 20

Banana
Age 20

Tell us about Strawberry, age 20

From the information you have given us Strawberry pays medical expenses, please enter details of the expense(s) below.

Medical Expenses [? Help](#)

Please enter the details of Strawberry's medical expense(s) below:

[?](#) Please enter any other expenses the person has. Examples of other expenses include paying medical bills for an elderly or sick person.

5 What type of medical expense does Strawberry have?
--Please Select--

6 How much is the expense?
\$

7 How often does Strawberry pay the expense?
--Please Select--

8 When did this expense begin?
DD/MM/YYYY

9 Does Strawberry have other expenses?
--Please Select--

Next

5.5.5.27.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	Medical Expenses

5.5.5.28 Other Expenses

The 'Other Expenses' page gathers other expense related information if the user states that he/she, or any other household member, has other expenses. Modifications include making existing OOTB questions mandatory and adding a new question to gather the start date of the other expense.



5.5.5.28.1 Screenshot (Modify)

Figure 94: Other Expenses

Other Expenses

Your household

Strawberry
Age 20

Banana
Age 20

Tell us about Strawberry, age 20

From the information you have given us Strawberry pays other expenses, please enter details of the expense(s) below.

Other Expenses [? Help](#)

Please enter the details of Strawberry's other expense(s) below:

4

5 Please select the expense type:

7 How much is the expense?
\$

8 How often does Strawberry pay the expense?

9 When did this expense begin?
DD/MM/YYYY

10 Does Strawberry have other expenses?

[Next](#)

5.5.5.28.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	Other Expenses

5.5.5.29 Summary of Your Expenses (MAGI)

The 'Summary of Your Expenses' page for the 'Expenses' section of the application presents a summary of the answers provided to questions in this section. Modifications made to the OOTB version include addition of new sections for child support expenses and dependent care expenses.



5.5.5.29.1 Screenshot (Modify)

Figure 95: Summary of Your Expenses – Blank Application

Summary of Your Expenses

7 If you need to add, change and/or remove any of the information, use the links to take you to the page. When you have finished reviewing the information, click 'Next'.

8 Here is a summary of the expense information we have on file. Click on 'Change' to view more details or to make a change. click on 'Remove' if the expense no longer exists. Click on 'Add' if you have a new expense to report.

Medical Expense Details

9 Please review the information we have on your file about medical expenses.

First Name	Type	Frequency	Change	Remove
Strawberry	Hospitalization/Outpatient Treatment	Monthly Amount \$500		

+ Add...

Other Expense Details

29 Please review the information we have on your file about other expenses such as alimony, moving expenses or student loan interest.

First Name	Expense Category	Frequency	Change	Remove
Strawberry	Court - Ordered Child Support	Monthly Amount \$100		

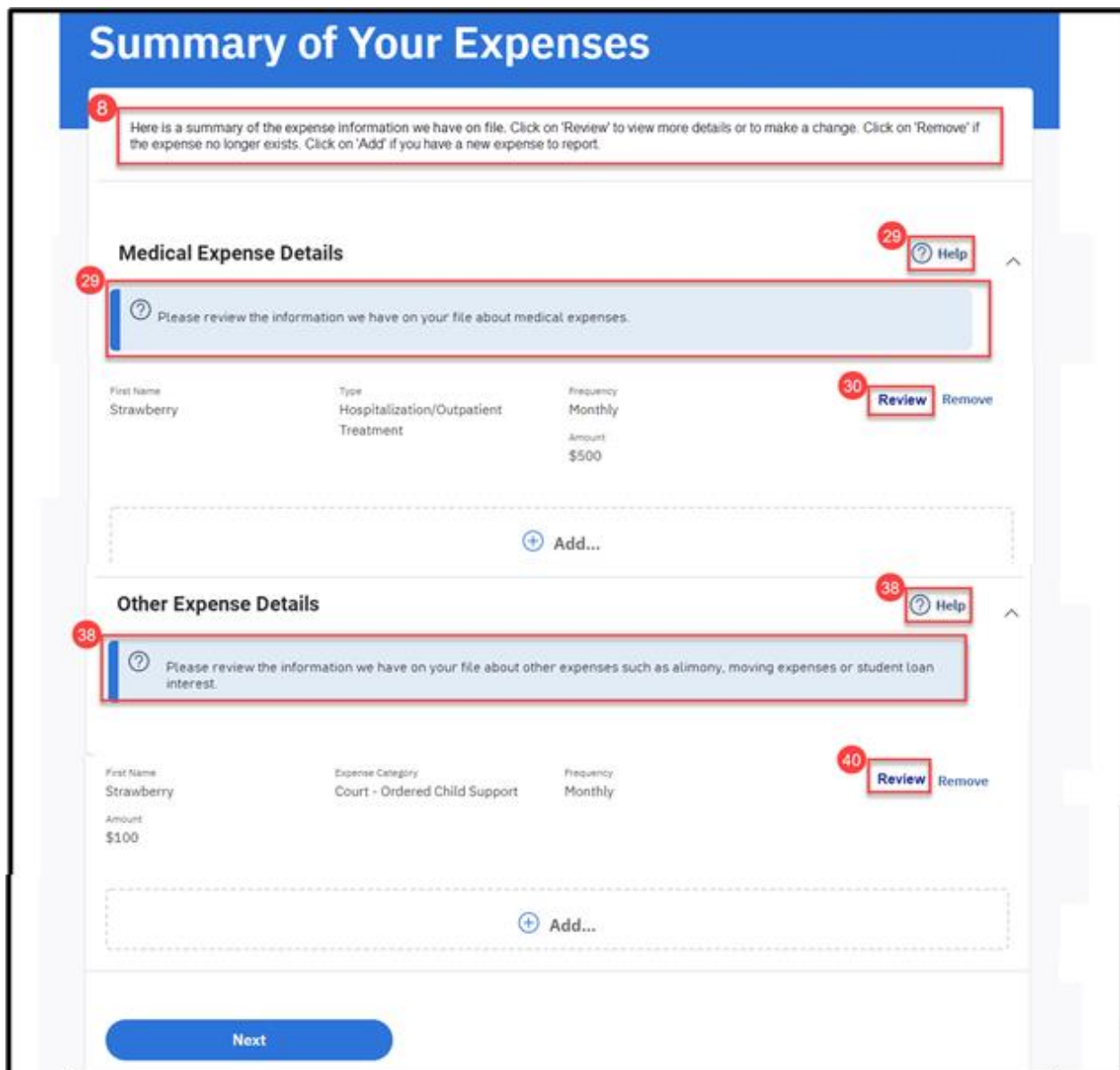
+ Add...

Next

Figure 96: Summary of Your Expenses – Prepopulated Form



I.4.2.p.ii Completed Citizen Mobile App
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5.5.5.29.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Summary of Your Expenses (MAGI)



5.5.5.30 Health Insurance Information

The 'Health Insurance Information' page gathers if the user or any member in the household pay for health insurance. Health insurance provides protection against financial loss from a personal accident or illness. Modifications include making existing OOTB questions mandatory.

5.5.5.30.1 Screenshot (Modify)

Figure 97: Health Insurance Information <PRMO-445>

5.5.5.30.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Health Insurance Information



5.5.5.31 Health Insurance Details

The 'Health Insurance Details' page gathers health insurance related information if the user states that he/she or any other household member pays for health insurance. Modifications include making all existing OOTB questions mandatory.



5.5.5.31.1 Screenshot (Modify)

Figure 98: Health Insurance Details

Health Insurance Details

Your household

Strawberry
Age 20

Banana
Age 20

Tell us about Strawberry, age 20

From the information you have given us Strawberry pays for health insurance, please enter the details of the health insurance Strawberry pays for below.

Health Insurance Expenses Help

Please enter the details of Strawberry's health insurance below:

Please indicate if anybody in your home pays for health insurance. Health insurance provides protection against financial loss from a personal accident or illness.

5 Who is the insurance provider?

6 Policy number:

7 Group number:

8 Please select the home members covered by Strawberry's health insurance:
 Strawberry
 Banana

9 Does Strawberry have any other health insurance?

[Next](#)



5.5.5.31.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Health Insurance Details

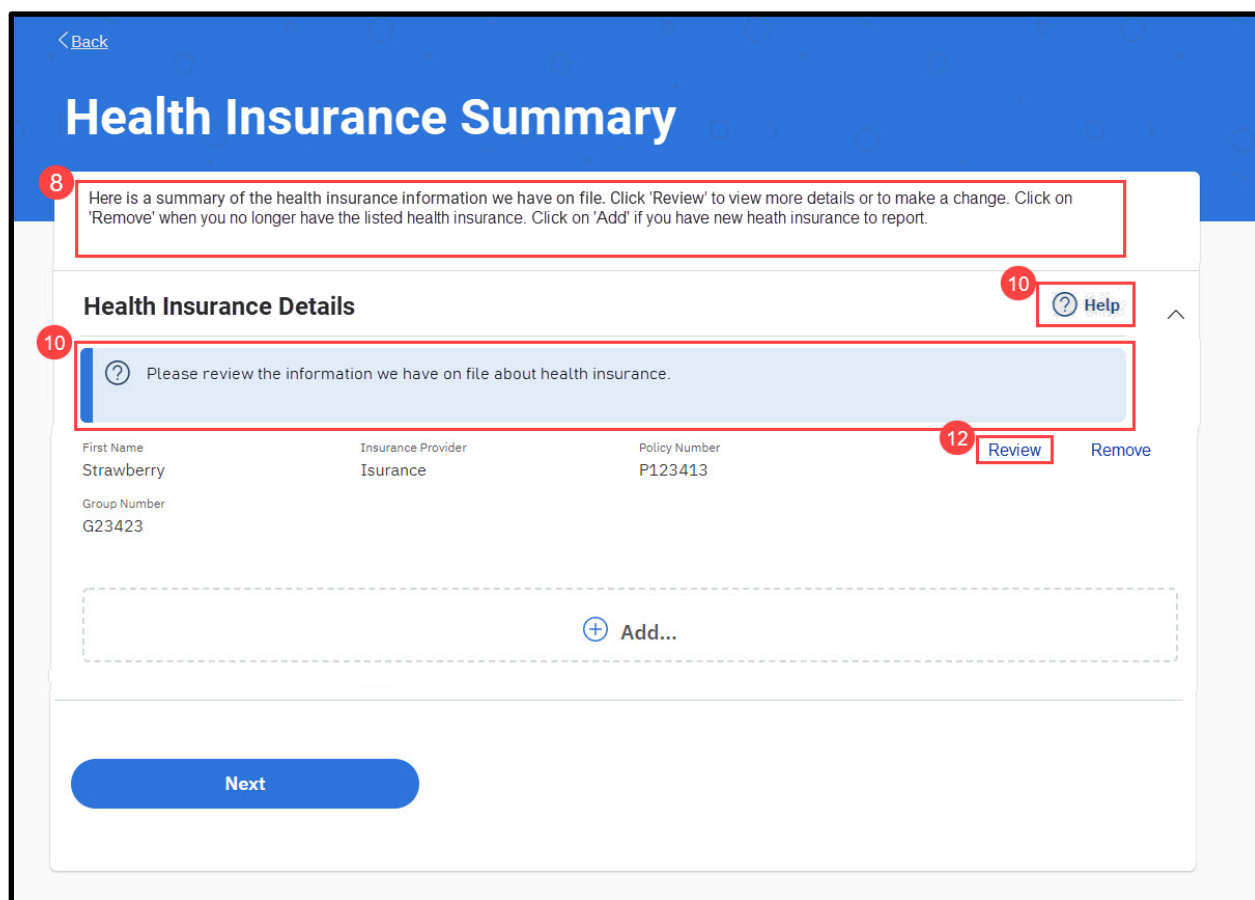


5.5.5.32 Health Insurance Summary

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

5.5.5.32.1 Screenshot (Modify)

Figure 99: Health Insurance Summary



5.5.5.32.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	Health Insurance Summary

5.5.5.33 <PRMO-445> Additional Information

The Additional Information page is used to allow the applicant to opt into or out of providing resource and expense information.

Tech Note: Display logic is documented in the TOC tab within Online Application Common Pages.

5.5.5.33.1 Screenshot (Modify)

Figure 100: Additional Information

1 Additional Information

2 The information you have provided is used to evaluate you and other household members for Medicaid or CHIP coverage using what are known as MAGI rules. If you do not qualify for coverage under MAGI rules, it is still possible that you may be eligible for coverage under other rules for what is known as Medically Needy, which is still a part of the federal Medicaid program. Additionally, the Puerto Rico Medicaid Program can evaluate you for coverage under our State Program. These additional rules are collectively known as "non-MAGI". This section is optional. You do not have to be evaluated for these other options, but if you choose to be evaluated you must supply the additional information requested below. Adding this information will not delay a decision about whether you are eligible under "MAGI". If you do not qualify under MAGI rules and do not elect to proceed with this supplemental application, you may do so later without starting a new application.

NOTE: For Aged individuals (persons 65 years and older), qualifying under MAGI rules is only possible if the individual is a close relative of a child under 18 years of age and is the main person taking care of this child.

3 Additional Information

4 Do you wish to provide additional information before submitting the application?

--Please Select--

Next

5.5.5.33.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Online Application Common Pages.xlsx	Additional Information

5.5.5.34 Disability Details

The ' Disability Details' page allows the applicant to provide additional information about a disabled household member such as the type of disability and the date it started. ~~This page is new.~~

<PRMO-445> This page will no longer appear within the General Information group. Instead, for each person indicated as disabled on the General Information page, if the applicant elected to provide additional information, the Disability Detail page will appear after the Additional Information page.



5.5.5.34.1 Screenshot (**New** Modify)

Figure 101: Disability Details

5.5.5.34.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Disability Details

5.5.5.35 Blind Details

The 'Blind Details' page allows the applicant to provide additional information about a blind household member. This page is new.



5.5.5.35.1 Screenshot (New)

Figure 102: Blind Details

5.5.5.35.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Blind Details

5.5.5.36 Disability Information Summary

The Disability Information Summary page will display the disability information of each disabled household member.

5.5.5.36.1 Screenshot (New)

Figure 103: Disability Information Summary – New Application <PRMO-445>



Disability Information Summary

Here is a summary of the disability information we have on file. Click on 'Change' to view more details or to make a change. Click on 'Remove' if the information is no longer valid. Click on 'Add' if you have new information to report.

Blind Details

First Name	Start Date	Determination made by		
Strawberry	--	--	Change	Remove

[+ Add...](#)

Disability Details

First Name	Start Date	Determination made by	Disability Type		
Strawberry	--	--	--	Change	Remove

[+ Add...](#)

[Next](#)

Figure 104: Disability Details – Prepopulated Application



Disability Information Summary

Here is a summary of the disability information we have on file. Click on 'Change' to view more details or to make a change. Click on 'Remove' if the information is no longer valid. Click on 'Add' if you have new information to report.

Blind Details

First Name Strawberry	Start Date ---	Determination made by ---	Change Remove
--------------------------	-------------------	------------------------------	---

+ Add...

Disability Details

First Name Strawberry	Start Date ---	Determination made by ---	Disability Type --	Change Remove
--------------------------	-------------------	------------------------------	-----------------------	---

+ Add...

Next

5.5.5.36.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Disability Information Summary

5.5.5.37 Resource General Information

The 'Resource General Information' page gathers resource information from the user or any member in the household that has resources. Examples of resources include home, vehicle, bank accounts, cash etc. Modifications include changes to cluster help, making OOTB questions mandatory, and addition of new questions to collect information related to property type of resource.



5.5.5.37.1 Screenshot (Modify)

Figure 105: Resource General Information

Please tell us about the people in your home who have resources.

Resources Information

[Help](#)

4 ? Does anyone in your home have a vehicle?
Please indicate if anyone in your home owns a vehicle. A vehicle is any form of transport that the person owns. Examples of vehicles include cars, vans, motorbikes, etc.
Does anyone in your home have other resources?
Please indicate if anyone in your home has other resources. A resource is anything that has a cash value. Examples include savings or checking accounts, safety deposit box contents, stocks, bonds or cash.

5 Does anyone in your home have a vehicle?
Yes

6 Please check the box for anyone who has a vehicle:
 Strawberry
 Banana

7 Does anyone in your home have a property?
Yes

8 Please check the box for anyone who has a property:
 Strawberry
 Banana

9 Does anyone in your home have other resources? Examples of other resources are cash on hand, checking account, savings account, stocks and bonds, tax refund, etc.)
Yes

10 Please check the box for anyone who has other resources:
 Strawberry
 Banana

Next

5.5.5.37.2 Description of Modifications and Additions

Details located in:



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Document	Tab Name
Online Application Common Pages.xlsx	Resource General Information

5.5.5.38 Vehicle

The 'Vehicle' page gathers vehicle related information from the user or any other household member that has a vehicle. A vehicle is any form of transport that the person owns. Examples of vehicles include cars, vans, motorbikes, etc. Modifications include making existing OOTB questions mandatory.



5.5.5.38.1 Screenshot (Modify)

Figure 106: Vehicle

< Back

Vehicle

Your household

Constance Age 27

Freddie Age 5

Tell us about Constance, age 27

From the information you have given us Constance has a vehicle, please enter the details below.

Please enter the details of Constance's vehicle below:

[?](#) This page allows you to enter details about anyone in your home that owns a vehicle. A vehicle is any form of transport that the person owns. Examples of vehicles include cars, vans, motorbikes, etc.

Vehicle Details [?](#) Help

Please enter the details of Constance's vehicle below:

5 Vehicle make:
Ford

6 Vehicle model:
F150

7 Year of registration:
2012

8 How is the vehicle used?
Essential Daily Activities

9 What is the vehicle worth?
\$ 2,000.00

10 How much is owed on this vehicle?
\$ 0.00

11 Does Constance have any other vehicles?
No

Next

English



5.5.5.38.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Vehicle

5.5.5.39 Property

The 'Property' page gathers property related information from the user or any other household member that has a property. Examples of properties include house, real estate, livestock, machinery, etc. This is a new page.



5.5.5.39.1 Screenshot (New)

Figure 107: Property

1 **Property**

Your household

2 Strawberry Age 20 **3** Banana Age 20

Tell us about Strawberry, age 20

4 From the information you have given us Strawberry has a property, please enter the details below.

5 **Property Details**

6 This page allows you to enter details about anyone in your home that owns a property. Examples of properties include house, real estate, livestock, and machinery, etc.

7 What type of property does Strawberry have?

House

8 What is the property size?

9 When did Strawberry purchase this property?
DD/MM/YYYY

10 What is the property worth?

\$

11 How much (if anything) does Strawberry owe on this property? Optional

\$

12 Is this property personal or business?

--Please Select--

13 What does Strawberry use this property for?

--Please Select--



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

12 Is Strawberry the sole owner of this property?

13 Please select the other owner(s) of this property if the owner is in the home or enter the owner name below. Optional
 Strawberry
 Banana

15 Owner name: Optional

16 Does Strawberry have any other property?

Next

5.5.5.39.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Property

5.5.5.40 Other Resources

The 'Other Resources' page gathers other resources related information if the user states that he/she or any other household member has other resources. A resource is anything that has a cash value. Examples include savings or checking accounts, safety deposit box contents, stocks, bonds, trusts, or cash. Modifications include making existing OOTB questions mandatory.



5.5.5.40.1 Screenshot (Modify)

Figure 108: Other Resources

[Back](#)

Other Resources

Your household

Constance
Age 27

Freddie
Age 5

Tell us about Constance, age 27

From the information you have given us Constance has other resources, please enter the details below.

Please enter the details of Constance's other resources below:

A resource is anything that that has a cash value. Examples include savings or checking accounts, safety deposit box contents, stocks, bonds, trusts or cash.

Other Resource Details [Help](#)

Please enter the details of Constance's other resources below:

5 **What is the type of Constance's resource?**
Cash on Hand

6 **What is the cash/market value of this resource?**
\$ 950.00

7 **How much, if any, does Constance owe on this resource?**
\$ 0.0

8 **Does Constance have any other resource?**
No

Next

5.5.5.40.2 Description of Modifications and Additions

Details located in:



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Document	Tab Name
Online Application Common Pages.xlsx	Other Resources

5.5.5.41 (Online COC) Summary of Your Resources

The 'Summary of Your Resources' page for the 'Resources' section of the application presents a summary of the answers provided to questions in this section. Modifications made to the OOTB version include addition of a new section for Property.



5.5.5.41.1 Screenshot (Modify)

Figure 109: Summary of Your Resources – Blank Application

Summary of Your Resources

If you need to add, change and/or remove any of the information, use the links to take you to the page. When you have finished reviewing the information, click 'Next'.

Vehicle Details

First Name	Type	Cash/Market Value	Change	Remove
Strawberry	AM General	\$2,000		
Amount Owed				
\$900				

+ Add...

Property Details

First Name	Type	Cash/Market Value	Change	Remove
Strawberry	Cash on Hand	\$25		
Amount Owed	Property Size	Usage		
\$0	950	Living		

+ Add...

Other Resources Details

First Name	Type	Cash/Market Value	Change	Remove
Strawberry	Cash on Hand	\$25		
Amount Owed				
\$0				

+ Add...

Next

Figure 110: Summary of Your Resources – Prepopulated Application



Summary of Your Resources

8 Here is the list of resources we have for your household. Click on Review to view more details or to update a resource. Click on Remove if you no longer have the resource. Click on Add if you wish to add a resource.

Vehicle Details

26 [? Help](#)

26 [?](#) Please review the information about vehicles owned by members of your household. A vehicle can be any means of transportation that a person owns, such as cars, vans, and motorbikes.

First Name	Type	Cash/Market Value	28 Review Remove
Strawberry	AM General	\$2,000	
Amount Owed	\$900		

[+](#) Add...

Property Details

29 [? Help](#)

29 [?](#) Please review the information about property owned by members of your household. Property can be anything of value that a person owns, such as a house, real estate, livestock, and machinery.

First Name	Type	Cash/Market Value	31 Review Remove
Strawberry	Cash on Hand	\$25	
Amount Owed	Property Size	Usage	
\$0	950	Living	

[+](#) Add...



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

5.5.5.41.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Summary of Your Resources

5.5.5.42 Expenses Information (Non-MAGI)

The 'Expenses Information' page gathers expense information from the user or any member in the household that have certain types of expenses. An expense is anything that is paid for an item or service. For example, expenses are payments made towards your medical bills, child support, dependent care, student loans interest, etc. Modifications include changes to cluster help, making OOTB questions mandatory, and addition of new questions to collect information related to child support expenses and dependent care expenses.



5.5.5.42.1 Screenshot (Modify)

Figure 111: <CR-445> Expenses Information

5.5.5.42.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Expenses Information



5.5.5.43 Child Support Expenses

The 'Child Support Expenses' page gathers child support expense related information if the user states that he/she, or any other household member, has a child support expense. This is a new page and it gathers details of the child, child support expense and child support recipient.



5.5.5.43.1 Screenshot (New)

Figure 112: Child Support Expenses

1 Child Support Expenses

Your household

2 Strawberry
Age 20

3 Banana
Age 20

Tell us about Strawberry, age 20

4 From the information you have given us Strawberry pays child support expenses, please enter details of the expense(s) below.

5 Child Support Expense Details

6 Please enter the details of Strawberry's child support expense(s) below:

7 How much is Strawberry paying in child support expenses?

\$

8 How often does Strawberry pay the expense?

--Please Select--

9 When did this expense begin?
DD/MM/YYYY



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

8 Child Support Recipient

9 Recipient Name:

10 What is the recipient address? If address is unknown, type 'Unknown' in Street 1.

11 Street 1

12 Street 2 Optional

13 City Optional

14 State Optional

15 Zip Optional



I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.1.ii Completed Medicaid Application - Citizen Portal

16 Child Detail

17 Child Name:

18 What is the child address? If address is unknown, type 'Unknown' in Street 1.

19 Street 1

20 Street 2 Optional

21 City Optional

22 State Optional

23 Zip Optional

24 Does Strawberry have another child support expenses?

[Next](#)

5.5.5.43.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Child Support Expenses



5.5.5.44 Dependent Care Expenses

The 'Dependent Care Expenses' page gathers Dependent Care expense related information if the user states that he/she, or any other household member, has a dependent care expense. This is a new page and it gathers details of the care provider and dependent care expense.



5.5.5.44.1 Screenshot (New)

Figure 113: Dependent Care Expenses

1 Dependent Care Expenses

Your household

Strawberry
Age 20

Banana
Age 20

Tell us about Strawberry, age 20

2 From the information you have given us Strawberry pays dependent care expenses, please enter details of the expense(s) below.

3 Dependent Care Expense Details

4 Please enter the details of Strawberry's dependent care expense(s) below:

5 How much is Strawberry paying in dependent care expenses?

\$

6 How often does Strawberry pay the expense?

--Please Select--

7 When did this expense begin?
DD/MM/YYYY

8 Is the care recipient part of this household?

Yes

9 Please check the box for the individual who is the recipient of care:

Banana

10 Why is dependent care required?

--Please Select--

11 How many hours per week is the recipient in dependent care?



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

12 Care Provider

13 What is the provider name?

14 Please provide the provider address.

15 Street 1

16 Street 2 Optional

17 City Optional

18 State Optional

19 Zip Optional

20 Does Strawberry have another dependent care expenses?

[Next](#)

5.5.5.44.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Dependent Care Expenses



5.5.5.45 Summary of Your Expenses (Non-MAGI)

The 'Summary of Your Expenses' page for the 'Expenses' section of the application presents a summary of the answers provided to questions in this section. Modifications made to the OOTB version include addition of new sections for child support expenses and dependent care expenses.



5.5.5.45.1 Screenshot (Modify)

Figure 114: Summary of Your Expenses – Blank Application <PRMO-445>

Summary of Your Expenses

If you need to add, change and/or remove any of the information, use the links to take you to the page. When you have finished reviewing the information, click 'Next'.

9 Child Support Expense Details

10 First Name Strawberry	11 Child Name Berry	12 Frequency Monthly	Change	Remove
13 Amount \$100				

+ Add...

14 Dependent Care Expense Details

15 First Name Strawberry	16 Dependent Name Banana	17 Frequency Monthly	Change	Remove
18 Amount \$100				

+ Add...

Next

Figure 115: Summary of Your Expenses – Prepopulated Form <PRMO-445>



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

5.5.5.45.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Summary of Your Expenses



5.5.5.46 Full Summary

The 'Full Summary' page for the application presents a summary of the answers provided to questions in the entire application. Modifications made to the OOTB version reflect the changes made to previous pages in the application.

5.5.5.46.1 Screenshot (Modify)

Figure 116: Full Summary – MAGI and Non-MAGI Prepopulated Page (Example)

Human Services Application Form Exit

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Full Summary

Here is the full summary of the information we have for your household. Click on 'Change' to make an update. Click on 'Remove' if the information is no longer valid. Click on 'Add' if you wish to add any additional information.

Name

First name: Strawberry Remove Change

Middle name: ... Remove Change

Last name: Cheesecake

Second last name: ... Remove Change

Addresses

Street 1: 123 Maple St Remove Change

Street 2: ...

City: San Juan

Neighborhood: ... Remove Change

State: Puerto Rico

Zip: 00901

In your mailing address the same as your residential address?
Yes

Contact Details

Home phone number: 1231234123 Remove Change

Work phone number:

Cell phone number:

Other phone number:

Email

Email address: cheesecakefactory@aol.com Remove Change



Figure 117: Full Summary – MAGI and Non-MAGI

Human Services Application Form Exit

[Back](#)

Full Summary

Here is a full summary of what you have told us about you and your home so far.

Name

First name: Strawberry
Middle name: --
Last name: Cheesecake
Change

Second last name: --

Addresses

Street 1: 123 Maple St
Street 2: --
City: San Juan
Neighborhood: --
State: Puerto Rico
Zip: 00901
Change

Is your mailing address the same as your residential address?
Yes

Contact Details

Home phone number: 1231234123
Work phone number:
Cell phone number:
Other phone number:
Change

Email

Email address: cheesecakefactory@aol.com
Change



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Personal Details

Social Security Number (SSN): --	If you have no SSN, have you applied for one? No	42 Reason why you don't have a SSN Good Cause	Change
Date of birth: 1/1/2000	Marital status: Married	Gender: Female	
What language do you wish to be contacted in? English	47 Police Officer: No	48 Relative of absent police officer: No	
49 Emancipated by a court order: No	Are you the sponsor of an immigrant? No	52 Citizenship status: Alien	
53 Alien status: Asylee	54 Do you have a sponsor? No	55 Date of Entry 1/1/2010	
57 Country/Region or Origin Antigua and Barbuda	58 Veteran status: --	59 When did you become a member of the household? --	

Where You Live

84 Describe your residency in Puerto Rico.	Where do you live? Home	87 When did you start living here?	Change
--	----------------------------	------------------------------------	--------



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.I.ii Completed Medicaid Application - Citizen Portal

<CR147>

Race and Ethnicity

Black or African American No	94 Native Alaskan or American Indian Yes	Asian No	Change
95 Native Hawaiian or Pacific Islander No	White or Caucasian No	272 Asian Indian No	
273 Chinese No	274 Filipino No	275 Japanese No	
276 Korean No	277 Vietnamese No	278 Asian Unknown No	
279 Native Hawaiian No	280 Guamanian or Chamorro No	281 Samoan No	
282 Other Pacific Islander No	Other No	Decline to Answer No	
Ethnicity --			



I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.1.ii Completed Medicaid Application - Citizen Portal

<PRMO-445>

Education

102 School Type

Undergraduate

What is the name of the school?

University

104 Do you attend full or part time?

Part Time

[Change](#)

People in your home

Is there anyone else in the household?

Yes

Help paying for your health benefits

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

Yes

[Change](#)

110 If eligible, do you have a preferred Managed Care Organization (MCO)?

Other Home Members

113 First Name	Banana	113 Middle name:	--	113 Last Name	Cheesecake	Change Remove
115 Second last name:	--	115 Gender	Male	115 Date of Birth	2/2/2000	
118 Citizenship status?	Alien	119 Alien status:	Asylee	120 Date of Entry	1/1/2010	
121 Applying for health benefits	--	123 MCO	--			
124 Social Security Number (SSN):	--	125 Applied for SSN	--	126 Reason for no SSN	--	
127 Marital status:	Married	128 Police Officer:	No	129 Relative of absent police officer:	No	
130 Emancipated by a court order:	No	131 Veteran status:	--	132 Resident of Puerto Rico	--	
133 Where do you live?	Home	134 When did this person start living here?	--	135 School Type?	--	

[+ Add](#)



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.I.ii Completed Medicaid Application - Citizen Portal

<PRMO 449>

Home Relationships

Strawberry Change

Banana

139 is the spouse of 140
Caretaker: No Widow(er) of divorcee of previous caretaker: --

Blind Details

153

154	First name	155	Start Date	156	Determination made by	Change	Remove
	Strawberry		--		--		

+ Add

Disability Details

157

158	First name	159	Start Date	160	Disability Type	Change	Remove
	Strawberry		--		--		

161 Determination made by: --

+ Add...

Pregnancy Details

162

163	Member Name	164	Number of children	165	Expected Delivery Date	Change	Remove
	Strawberry		1		10/10/2020		

166 Pregnancy End Date

+ Add...



I.4.2.p.ii Completed Citizen Mobile App I.4.2.I.ii Completed Medicaid Application - Citizen Portal

168 Foster Care Details

169 First name	170 State	171 Foster Care notification Type	Change	Remove
Strawberry	--	--		

+ Add

172 Former Foster Care Details

First name	State	Enrolled	Change	Remove
Strawberry	--	--		

+ Add

178 Adoption Details

179 Adoption agreement type	180 Start Date	Change	Remove
--	--		

+ Add



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

<CR-170>

Current Benefit Information

First Name Strawberry	194 Benefit Type	195 State	Change	Remove
--------------------------	-------------------------	------------------	--------	--------

+ Add...

Employment Details

First Name Strawberry	Employer Name Employment	Frequency Monthly	272 Type	Change	Remove
Amount \$1,000					

+ Add...

Self Employment Details

First Name Strawberry	Business Name My Business	Frequency Annual	Change	Remove
Amount \$20,000				

+ Add...

Other Income Details

First Name Strawberry	Type of Income Bingo/Gambling Winnings	Frequency Once Off	Change	Remove
Amount \$1,000				

+ Add...



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

216 Trust Income Details

217 First Name Strawberry	218 Type of Income Fruit Trust	219 Frequency Once Off	Change	Remove
220 Amount \$45,000				

+ Add...

221 Annuity Income Details

222 First Name Strawberry	223 Type of Income Fixed Annuity	224 Frequency Once Off	Change	Remove
225 Amount \$1,000				

+ Add...

Vehicle Details

First Name Strawberry	Type AM General	Cash/Market Value \$2,000	Change	Remove
Amount Owed \$900				

+ Add...

233 Property Details

234 First Name Strawberry	235 Type Cash on Hand	236 Cash/Market Value \$25	Change	Remove
237 Amount Owed \$0	238 Property Size 950	239 Usage Living		

+ Add...



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Other Resources Details ^

First Name Strawberry	Type Cash on Hand	Cash/Market Value \$25	Change	Remove
Amount Owed \$0				

+ Add...

Medical Expense Details ^

First Name Strawberry	Type Hospitalization/Outpatient Treatment	Frequency Monthly	Change	Remove
Amount \$500				

+ Add...

252 Child Support Expense Details ^

253 First Name Strawberry	254 Child Name Berry	255 Frequency Monthly	Change	Remove
256 Amount \$100				

+ Add...

257 Dependent Care Expense Details ^

258 First Name Strawberry	259 Dependent Name Banana	260 Frequency Monthly	Change	Remove
261 Amount \$100				

+ Add...

Other Expense Details ^

First Name Strawberry	Expense Category Court - Ordered Child Support	Frequency Monthly	Change	Remove
Amount \$100				

+ Add...



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Health Insurance Details ^

First Name Strawberry	Insurance Provider Isurance	Policy Number P123413	Change	Remove
Group Number G23423				

[+ Add...](#)

[Next](#)

Figure 118: Full Summary – MAGI Only



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Human Services Application Form Exit

[Back](#)

Full Summary

Here is a full summary of what you have told us about you and your home so far.

Name

First name: Strawberry	Middle name: --	Last name: Cheesecake	Change
Second last name: --			

Addresses

Street 1: 123 Maple St	Street 2: --	City: San Juan	Change
State: Puerto Rico	Zip: 00901	Neighborhood:	

Is your mailing address the same as your residential address?
Yes

Contact Details

Home phone number: 1231234123	Work phone number:	Cell phone number:	Change
Other phone number:			

Email

Email address: cheesecakefactory@aol.com	Change
---	--------



I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Personal Details

Social Security Number (SSN): --	If you have no SSN, have you applied for one? No	42 Reason why you don't have a SSN Good Cause	Change
Date of birth: 1/1/2000	Marital status: Married	Gender: Female	
What language do you wish to be contacted in? English	47 Police Officer: No	48 Relative of absent police officer: No	
49 Emancipated by a court order: No	Are you the sponsor of an immigrant? No	52 Citizenship status: Alien	
53 Alien status: Asylee	54 Do you have a sponsor? No	55 Date of Entry 1/1/2010	
57 Country/Region or Origin Antigua and Barbuda	58 Veteran status: --	59 When did you become a member of the household? --	

Where You Live

84 Describe your residency in Puerto Rico.	Where do you live? Home	87 When did you start living here?	Change
--	----------------------------	------------------------------------	--------

Race and Ethnicity

Black or African American No	93 Native Alaskan or American Indian Yes	Asian No	Change
95 Native Hawaiian or Pacific Islander No	White or Caucasian No	272 Asian Indian No	
273 Chinese No	274 Filipino No	275 Japanese No	
276 Korean No	277 Vietnamese No	278 Asian Unknown No	
279 Native Hawaiian No	280 Guamanian or Chamorro No	281 Samoan No	
282 Other Pacific Islander No	Other No	Decline to Answer No	
Ethnicity --			



I.4.2.p.ii Completed Citizen Mobile App
 I.4.2.l.ii Completed Medicaid Application - Citizen Portal

Education ^

<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 102 School Type Undergraduate </div>	What is the name of the school? University	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 104 Do you attend full or part time? Part Time </div>	Change
---	---	--	--

People in your home ^

Is there anyone else in the household?
Yes

Help paying for your health benefits ^

<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 106 Do you want to find out if you can get help paying for health benefits? Yes </div>	Change
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 119 If eligible, do you have a preferred Managed Care Organization (MCO)? </div>	

Other Home Members ^

<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 113 First Name Banana </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 113 Middle name: -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 113 Last Name Cheesecake </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 113 Change Remove </div>
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 115 Second last name: -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 115 Gender Male </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 115 Date of Birth 2/2/2000 </div>	
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 118 Citizenship status? Alien </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 119 Alien status: Asylee </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 120 Date of Entry 1/1/2010 </div>	
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 121 Applying for health benefits -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 123 MCO -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 123 Reason for no SSN -- </div>	
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 124 Social Security Number (SSN): -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 125 Applied for SSN -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 126 Reason for no SSN -- </div>	
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 127 Marital status: Married </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 128 Police Officer: No </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 129 Relative of absent police officer: No </div>	
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 130 Emancipated by a court order: No </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 131 Veteran status: -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 132 Resident of Puerto Rico -- </div>	
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 133 Where do you live? Home </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 134 When did this person start living here? -- </div>	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> 135 School Type? -- </div>	

+ Add



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Home Relationships

Strawberry Change

Banana
is the spouse of
Caretaker No
Widow(er) of divorcee of previous caretaker --

Pregnancy Details

163 Member Name Strawberry	164 Number of children 1	165 Expected Due Date 10/10/2020	Change	Remove
166 Pregnancy End Date				

+ Add...



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

168 Foster Care Details

169 First name	170 State	171 Foster Care notification Type	Change	Remove
Strawberry	--	--		

+ Add

172 Former Foster Care Details

First name	State	Enrolled	Change	Remove
Strawberry	--	--		

+ Add

178 Adoption Details

179 Adoption agreement type	180 Start Date	Change	Remove
--	--		

+ Add



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Current Benefit Information

First Name Strawberry	194 Benefit Type	195 State	Change	Remove
--------------------------	-------------------------	------------------	--------	--------

+ Add...

Employment Details

First Name Strawberry	Employer Name Employment	Frequency Monthly	272 Type	Change	Remove
--------------------------	-----------------------------	----------------------	-----------------	--------	--------

Amount
\$1,000

+ Add...

Self Employment Details

First Name Strawberry	Business Name My Business	Frequency Annual	Change	Remove
--------------------------	------------------------------	---------------------	--------	--------

Amount
\$20,000

+ Add...

Other Income Details

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

Amount
\$1,000

+ Add...



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

216 Trust Income Details

217 First Name Strawberry	218 Type of Income Fruit Trust	219 Frequency Once Off	Change	Remove
220 Amount \$45,000				

+ Add...

221 Annuity Income Details

222 First Name Strawberry	223 Type of Income Fixed Annuity	224 Frequency Once Off	Change	Remove
225 Amount \$1,000				

+ Add...

Medical Expense Details

First Name Strawberry	Type Hospitalization/Outpatient Treatment	Frequency Monthly	Change	Remove
		Amount \$500		

+ Add...

Other Expense Details

First Name Strawberry	Expense Category Court - Ordered Child Support	Frequency Monthly	Change	Remove
Amount \$100				

+ Add...



I.4.2.p.ii Completed Citizen Mobile App
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5.5.5.46.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Common Pages.xlsx	Full Summary

5.5.6 (Online COC) Additional IEG Pages

5.5.6.1 (Online COC) Select Change Types

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



5.5.6.1.1 Screenshot (New)

Figure 119: Select Change Types – Primary Member <CR189>

1 Select Change Types

2 Please indicate the types of information you would like to change. You may select as many as you like. If you aren't sure and would like to review the information we have about you, member on the case, you can view and modify information about the on Claire Ellis (claire_ellis@redmane.com) is signed in

3 Home Member Personal Information

4 Home Member Personal Information includes personal information such citizenship status, marital status, relationship to a police officer, veteran status, residence information, education and relationship to other household members.

5 Have there been any changes to any household members personal information?
Yes

6 Addresses

7 Addresses includes your household's residential and mailing addresses. It can also include different addresses for one or more members of the household.

8 Have any of your addresses changed?
Yes

9 General Information

10 General information includes pregnancy, foster care, and adoptions.

11 Do you have a change in pregnancy, foster care, or adoptions to report?
Yes

26 Benefits

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

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

12 Income

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

14 Do you have a change in income to report?
Yes

15 Resources

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

17 Do you have a change in resources to report?
Yes

18 Expenses

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

20 Do you have a change in medical bills, alimony, or student loans expenses to report?
Yes

24 Health Insurance Information

22 Health Insurance Information includes information about health insurance payments.

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

Disability Information

Disability information includes everyone applying for or receiving benefits and is blind or disabled.

Do you have a change in blindness or disability to report?
Yes

Next



Figure 120: Select Change Types –Member

1 Select Change Types

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

9 General Information

10 General Information includes pregnancy, foster care, and adoptions.

11 Do you have a change in pregnancy, foster care, or adoptions to report?

Yes

26 Benefits

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

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

Yes

12 Income

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

14 Do you have a change in income to report?

Yes

15 Resources

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

17 Do you have a change in resources to report?

Yes

18 Expenses

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

20 Do you have a change in medical bills, alimony, or student loans expenses to report?

Yes

21 Health Insurance Information

22 Health Insurance Information includes information about health insurance payments.

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

Yes

Disability Information

Disability information includes everyone applying for or receiving benefits and is blind or disabled.

Do you have a change in blindness or disability to report?

Yes

24 Next

5.5.6.1.2 Description of Modifications and Additions

Details located in:



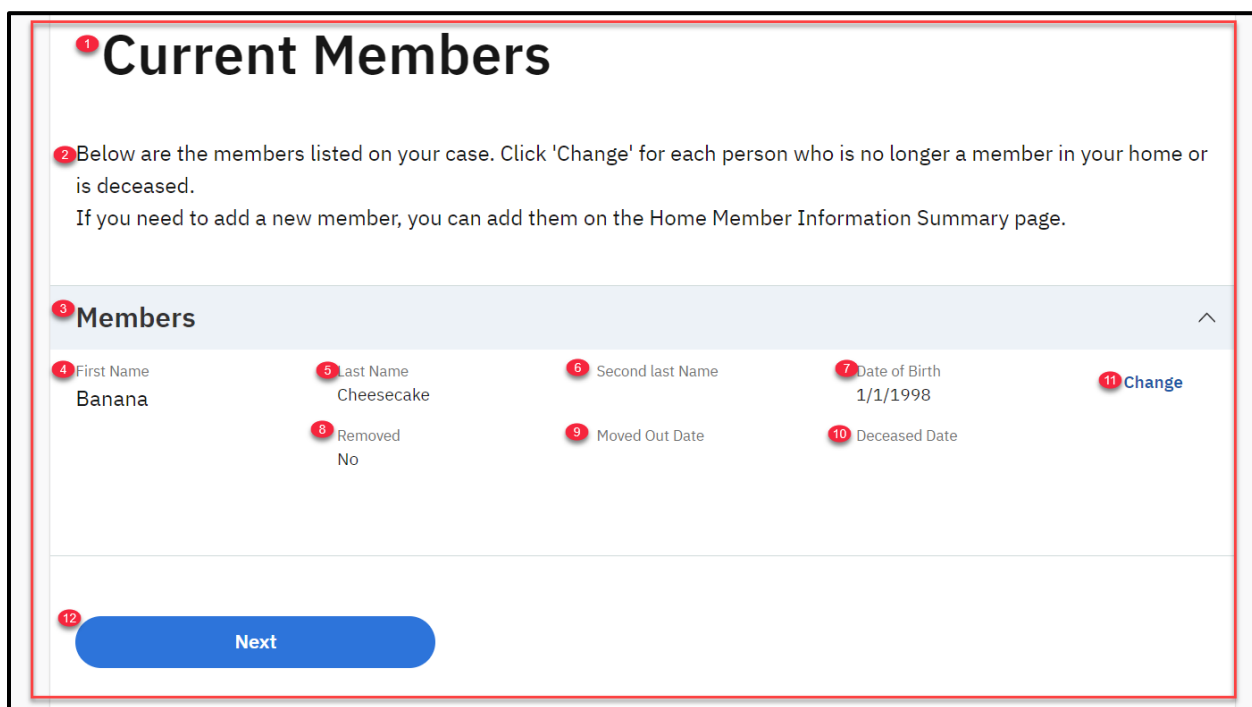
Document	Tab Name
Online Application Additional Pages.xlsx	Select Change Types

5.5.6.2 (Online COC) <CR189> Current Members

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

5.5.6.2.1 Screenshot (Modify)

Figure 121: Current Members



5.5.6.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Additional Pages.xlsx	Current Members



5.5.6.3 (Online COC) Home Information

The Home Information page allows the user to remove a person from their home.

5.5.6.3.1 Screenshot (Modify)

Figure 122: Home Information - Deceased

The screenshot shows a mobile application form titled "Home Information". It contains the following elements:

- 1** **Home Information** (Section Header)
- 2** Tell us if the member is part of your household.
- 3** Is Banana no longer a member in your home?
- 4** Tell us why you are removing this member?
A dropdown menu is shown with the selected option "Deceased".
- 6** Date of Death
DD/MM/YYYY
An empty date input field with a calendar icon.
- 7** **Next** (Blue button)

Figure 123: Home Information – Moved Out



1 Home Information

2 Tell us if the member is part of your household.

3 Is Banana no longer a member in your home?

4 Tell us why you are removing this member?

Moved out of the household

5 Moved out on
 DD/MM/YYYY

7 [Next](#)

5.5.6.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Additional Pages.xlsx	Home Information

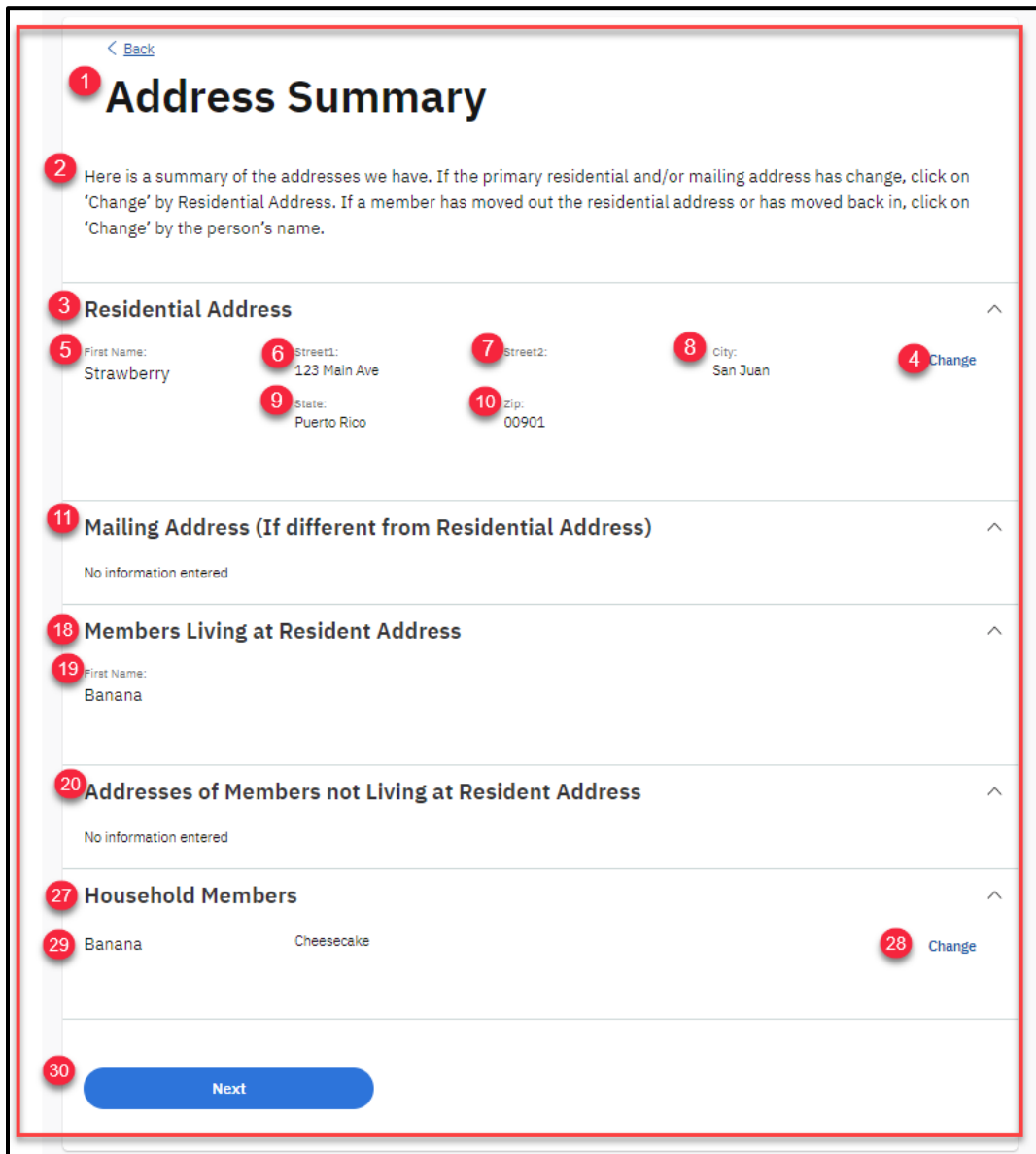
5.5.6.4 (Online COC) <CR189> Address Summary

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



5.5.6.4.1 Screenshot (Modify)

Figure 124: Address Summary



5.5.6.4.2 Description of Modifications and Additions

Details located in:



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Document	Tab Name
Online Application Additional Pages.xlsx	Address Summary

5.5.6.5 (Online COC) <CR189> Address Details

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



5.5.6.5.1 Screenshot (Modify)

Figure 125: Address Details

1 Address Details

2 Is Mango address same as Primary Client's address?
No

3 Please enter your address below:

4 Street1

5 Street2 Optional

6 State
Puerto Rico

7 City:

8 Zip:

9 Next



5.5.6.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Additional Pages.xlsx	Address Details



5.5.6.6 Home Member Information Summary

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

5.5.6.6.1 Screenshot (Modify)

Figure 126: Home Member Information Summary – Applicant <PR-14507>



[Back](#)

Home Member Information Summary

Here is a summary of the home member personal information we have on file. Click 'Change' to see the full detail and to make a change.

Other Home Members

Please review the person information we have on file.

First Name Banana	Middle name: --	Last Name Cheesecake	Change
Second last name: --	Gender Male	Date of Birth 2/2/2000	
Citizenship status? Alien	Alien status: Asylee	Date of Entry 1/1/2010	
Applying for health benefits --		MCO --	
Social Security Number (SSN): XXX-XX-1234	Applied for SSN --	Reason for no SSN --	
Marital status: Married	Police Officer: No	Relative of absent police officer: No	
Emancipated by a court order: No	Veteran status: --	Resident of Puerto Rico --	
Where do you live? Home	When did this person start living here? --	School Type? --	

Home Relationships

Please review the relationships between members in the household.

Strawberry [Change](#)

Banana
is the spouse of
Caretaker
No

Widow(er) of divorcee of previous caretaker
--

[Next](#)

Figure 127: Home Member Information Summary – Non-Applicant <PR-14507> <PRMO-445>



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

7 Home Member Information Summary

9 Here is a summary of the home member personal information we have on file. Click 'Change' to see the full detail and to make a change.

11 Other Home Members Help

11 Please review the person information we have on file.

First Name: Banana	Middle name: --	Last Name Cheesecake
Second last name: --	Gender Male	Date of Birth 2/2/2000
Citizenship status? Alien	Alien status: Asofoe	Date of Entry 1/1/2010
Applying for health benefits --	American Indian/Alaska Native --	MCO --
Social Security Number (SSN): XXX-XX-1234	Police Officer: No	Relative of absent police officer: No
		Resident of Puerto Rico --
Where do you live? Home	When did this person start living here? --	

26

39 Home Relationships Help

39 Please review the relationships between members in the household.

Strawberry Change

Banana is the spouse of
Caretaker
No

Widow(er) of divorcee of previous caretaker
--

Next

5.5.6.6.2 Description of Modifications and Additions

Details located in:



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

Document	Tab Name
Online Application Additional Pages.xlsx	Home Member Information Summary

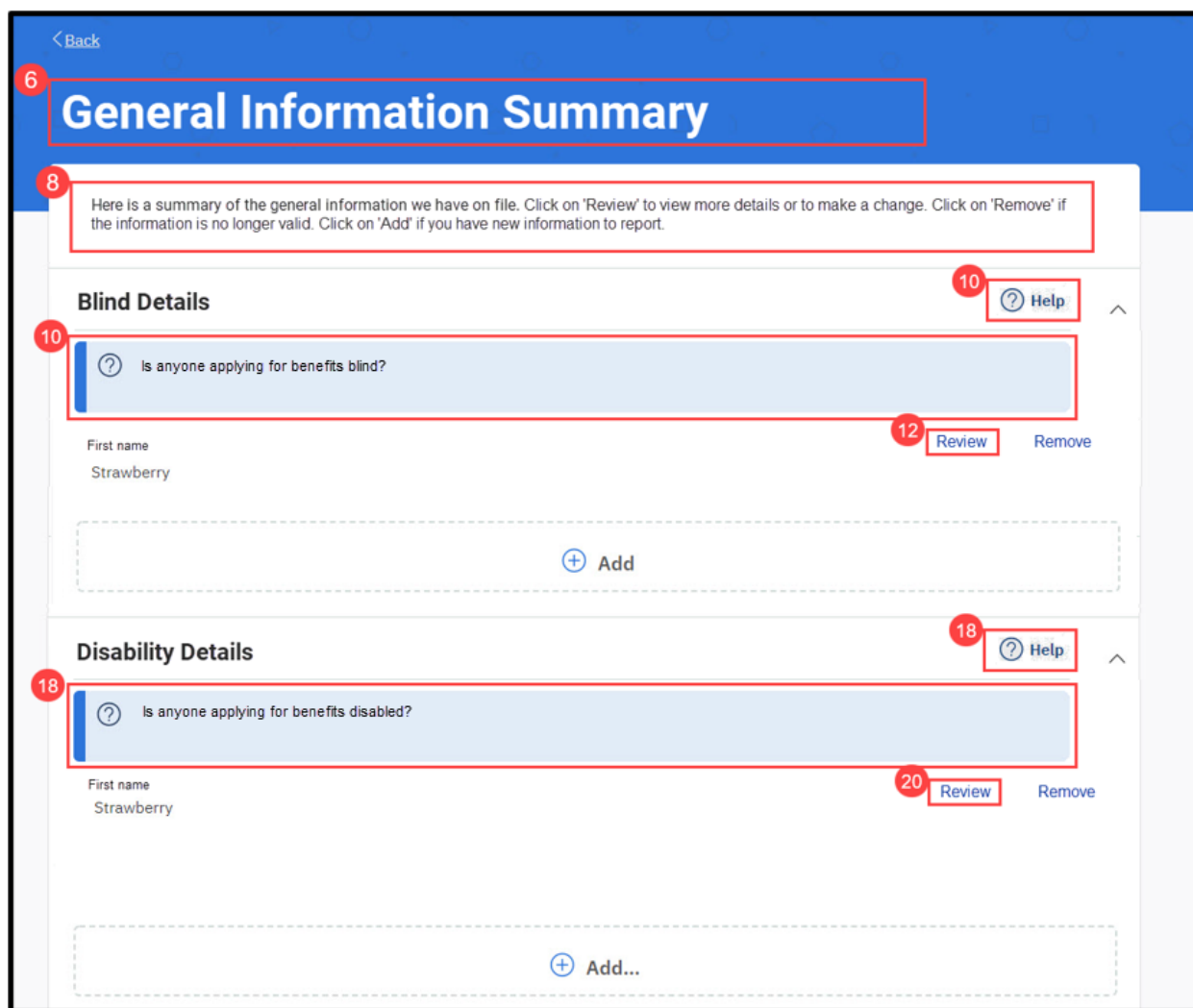


5.5.6.7 General Information Summary

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

5.5.6.7.1 Screenshot (Modify)

Figure 128: <PRMO-449> General Information Summary





I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Pregnancy Details

27 [Help](#)

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

Member Name	Number of children	Estimated delivery date	29 Review	Remove
Strawberry	1	10/10/2020		

Pregnancy end date

+ Add...

Foster Care Details

36 [Help](#)

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

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

+ Add

Former Foster Care Details

44 [Help](#)

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

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

+ Add

Adoption Details

52 [Help](#)

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

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

+ Add



<CR189>

5.5.6.7.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Additional Pages.xlsx	General Information Summary

5.5.7 Submission Pages for Online IEG Scripts

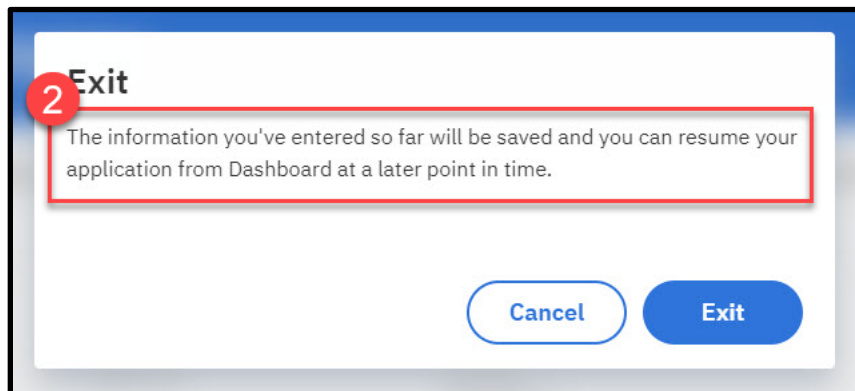
5.5.7.1 (Online COC) Exit

The 'Exit' page is displayed when a user chooses to exit the application during the process of filling out the application. The exit page informs the user that his/her information will be saved and that he/she can resume the application at a later point. Modification includes changes to the OOTB text as the user is no longer allowed to submit an incomplete application.



5.5.7.1.1 Screenshot (Modify)

Figure 129: Exit



5.5.7.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Submission Pages.xlsx	Exit

5.5.7.2 (Online COC) Electronic Signature

The 'Electronic Signature' page provides the rights and responsibilities information to the user and gathers the user's consent and electronic signature. Modifications to the OOTB page include addition of new information for Health Insurance Portability and Accountability Act, and Employer Contribution Disclaimer. Changes are also made to existing OOTB text for PHI and Authorization to Release Information.

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



5.5.7.2.1 Screenshot (Modify)

Figure 130: Electronic Signature – Application

Electronic Signature

Your Rights and Responsibilities

Please read the following and check the box below.

4 <PRMP Rights and Responsibilities>

I have read my rights and responsibilities

6 Health Insurance Portability and Accountability Act

7 Please read the following and check the box below.

8 <PRMP HIPAA>

9 I have read the Health Insurance Portability and Accountability Act.

10 Employer Contribution Disclaimer

11 Please read the following and check the box below.

12 If you or any family member is a public employee or retired from any Government Agency, Municipality or Public Corporation and is eligible for the Government Health Plan, in order to have additional health coverage as a public employee, the Health Insurance Administration of Puerto Rico (ASES) must receive the employer contribution that such Agency allocates for the payment of said plan. For any questions or concerns please contact ASES at 1 (800) 981-2737 or (787) 474-3300.

13 I have read the Employer Contribution Disclaimer.



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Management and Protection of Personal Health Information Policy

This notice describes how medical information about you may be used and disclosed, and how you can get access to this information. Please review it carefully and check the box below.

16 <PRMP Pht>

17 I have read the Puerto Rico Medicaid Program's Management and Protection of Personal Health Information Policy.

Authorization To Release Information

Please read the following and check the box below:

18 I/we authorize any person having custody or knowledge of the information relating to me or other household members to disclose any requested information, including confidential information other than protected health information, to any authorized agent of the Puerto Rico Medicaid Program.

19 I understand the information I provide on or with this application is subject to verification by Federal, state and local office to determine if the information is correct. If any of the information is incorrect, assistance may be denied and I may be subject to criminal prosecution for knowingly providing incorrect information. I agree to report to the department any changes in income, assets, or living arrangements within 30 days of occurrence.

By checking this box I am providing my authorization to release information.

Applicant's Signature

Please check the box and enter your name below:

20 By checking this box and typing my name below, I am electronically signing my application for assistance. I understand that my application will be electronically submitted to the Puerto Rico Medicaid Program. I also understand that my electronic signature has the same legal effect and enforceability as my written signature.

21 First name:

22 Middle name: Optional

Last name:

23 Second last name: Optional

Next

Figure 131: Electronic Signature – Applicant’s Signature Cluster – Change of Circumstance



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Applicant's Signature

Please check the box and enter your name below:

By checking this box and typing my name below, I am electronically signing my report of a change. I understand that this form will be electronically submitted to the Puerto Rico Medicaid Program. I also understand that my electronic signature has the same legal effect and enforceability as my written signature.

First name:

Middle name: Optional

Last name:

Second last name: Optional

Next



Figure 132: Electronic Signature – Applicant’s Signature Cluster – Renewal

Applicant's Signature

Please check the box and enter your name below:

25 By checking this box and typing my name below, I am electronically signing my renewal application. I understand that this form will be electronically submitted to the Puerto Rico Medicaid Program. I also understand that my electronic signature has the same legal effect and enforceability as my written signature.

First name:

Middle name: Optional

Last name:

Second last name: Optional

Next

5.5.7.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Submission Pages.xlsx	Electronic Signature

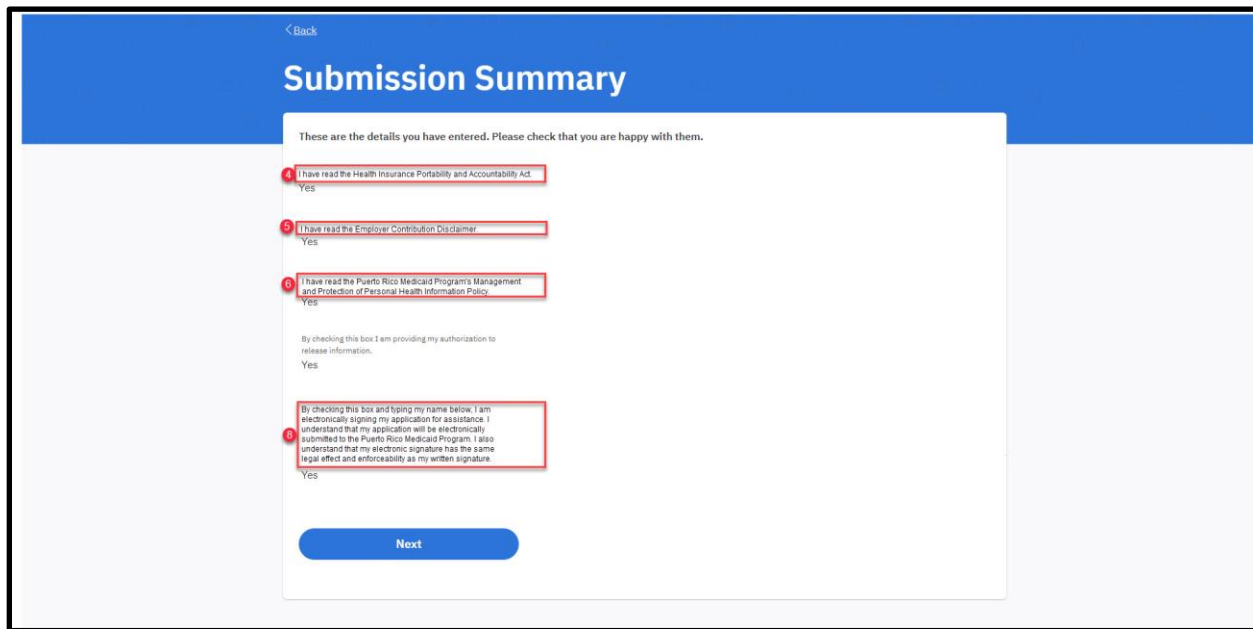
5.5.7.3 (Online COC) Submission Summary

The 'Submission Summary' page for the 'Electronic Signature' section of the application presents a summary of the answers provided to questions in this section. Modifications made to the OOTB version reflect the changes made to 'Electronic Signature' page.



5.5.7.3.1 Screenshot (Modify)

Figure 133: Submission Summary



5.5.7.3.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Submission Pages.xlsx	Submission Summary

5.5.7.4 Application Submitted

The 'Application Submitted' page is displayed after the user has successfully submitted his/her completed application. The page provides a reference number and a pdf version of the completed application. It also provides guidance on the next steps for the user. Modifications include instructions to the user to upload supporting documents and a link to upload documents.




5.5.7.4.1 Screenshot (Modify)

Figure 134: Application Submitted


1 Application for the Government Health Plan


Overview



Application Submitted

Your reference number is
309

2  We sent you a confirmation email.

6 You can also [view submitted application.pdf](#) .

3 **7** **What's next: Provide required supporting documentation**

8 Provide proof of the following items by uploading documentation to PSPMPR, mailing, or dropping off documentation at your local office.

- ID proof (Driver's License, Voting ID)
- Citizenship (U.S. Passport, Birth Certificate)
- SSN (Social Security Card)
- Address
- Proof of Age (Driver's License, Birth Certificate, Marriage Certificate)
- Income (Pay Stub, Alimony, Evidence of Unemployment Benefits, Evidence of Aid Received from Family, and Social Security, Retirement, Veteran, Military or State derived Income)
- Resources (Cash, Checking and Savings Accounts, Bonds, Stocks, Life Insurance)
- Medical Insurance (Medical Insurance Card)

9 [Click here to upload your supporting documentations.](#)

4 **11** **Decision**

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

13 **5** **14** **Survey**

Let us know how we did! [Click here to take a short survey to help us improve our online services](#)



5.5.7.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Submission Pages.xlsx	Application Submitted



5.5.7.5 (Online COC) Confirmation


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

5.5.7.5.1 Screenshot (New)


Figure 135: Confirmation – Change of Circumstance



1 Confirmation

2 

3 **Change Submitted**

5  We sent you a confirmation email.

8 **2 What's next: Provide required supporting documentation**

9 Provide proof which is required by uploading documentation to PSPMPR, mailing, or dropping off documentation at your local office. You may need to include some of the following items:

- ID proof (Driver's License, Voting ID)
- Citizenship (U.S. Passport, Birth Certificate)
- SSN (Social Security Card)
- Address
- Proof of Age (Driver's License, Birth Certificate, Marriage Certificate)
- Income (Pay Stub, Alimony, Evidence of Unemployment Benefits, Evidence of Aid Received from Family, and Social Security, Retirement, Veteran, Military or State derived Income)
- Resources (Cash, Checking and Savings Accounts, Bonds, Stocks, Life Insurance)
- Medical Insurance (Medical Insurance Card)

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

10 [Click here to go to Your Documents to upload your supporting documentation.](#)


11 **3 Decision**

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




Figure 136: Confirmation – Renewal

1 Confirmation



2

4 Renewal Submitted

- 5  We sent you a confirmation email.
- 6 You have requested renewal for the following individuals:
 - 7 • Mango Cheesecake
- 8 **2 What's next: Provide required supporting documentation**
- 9 Provide proof which is required by uploading documentation to PSPMPR, mailing, or dropping off documentation at your local office. You may need to include some of the following items:
 - ID proof (Driver's License, Voting ID)
 - Citizenship (U.S. Passport, Birth Certificate)
 - SSN (Social Security Card)
 - Address
 - Proof of Age (Driver's License, Birth Certificate, Marriage Certificate)
 - Income (Pay Stub, Alimony, Evidence of Unemployment Benefits, Evidence of Aid Received from Family, and Social Security, Retirement, Veteran, Military or State derived Income)
 - Resources (Cash, Checking and Savings Accounts, Bonds, Stocks, Life Insurance)
 - Medical Insurance (Medical Insurance Card)

The Your Documents page will show you which information is required.
- 10 [Click here to go to Your Documents to upload your supporting documentation.](#)
- 11 **3 Decision**
- 13 Once we've processed your renewal, you'll receive a notice telling you the decision we made.



5.5.7.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Online Application Submission Pages.xlsx	Confirmation

5.5.7.6 Survey Questions

The 'Survey Questions' page is displayed after a user submits a completed application. It collects information regarding the user's experience after he/she fills out the application.



5.5.7.6.1 Screenshot (New)

Figure 137: Survey Questions

1 Survey Questions

2 Give us your feedback! We want to know what you think!

3 1. How easy was it to understand the information required for the application?

4 Very easy

5 Somewhat Easy

6 Neutral

7 Not easy

8 Difficult

9 2. How likely are you to use this online service in the future?

10 Very unlikely

11 Not likely

12 Neutral

13 Somewhat likely

14 Very likely

15 3. How satisfied are you with this online service?

16 Very not satisfied

17 Not satisfied

18 Neutral

19 Somewhat satisfied

20 Very satisfied

21 4. Do you have any comments or suggestions on how to improve this online service?

22 Cancel **23** Submit

5.5.7.6.2 Description of Modifications and Additions

Details located in:

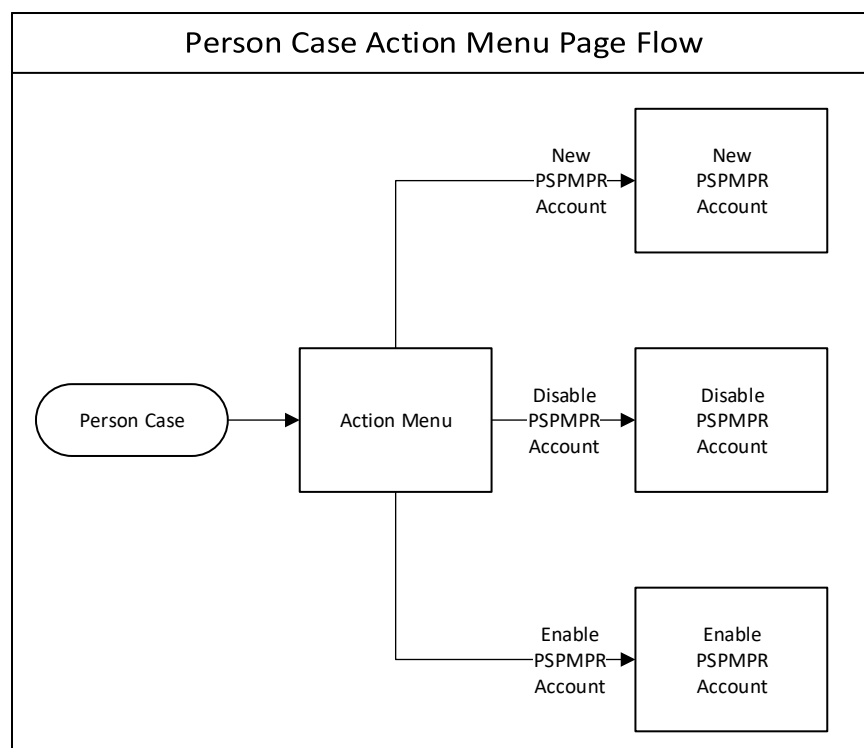


Document	Tab Name
Survey Questions.docx	N/A

5.6 (Online COC) Person Case

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

Figure 138: Person Case Action Menu Page Flow



5.6.1 (Online COC) Action Menu

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

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



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

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

5.6.1.1 Screenshot (Modify)

Figure 139: New PSPMPR Account

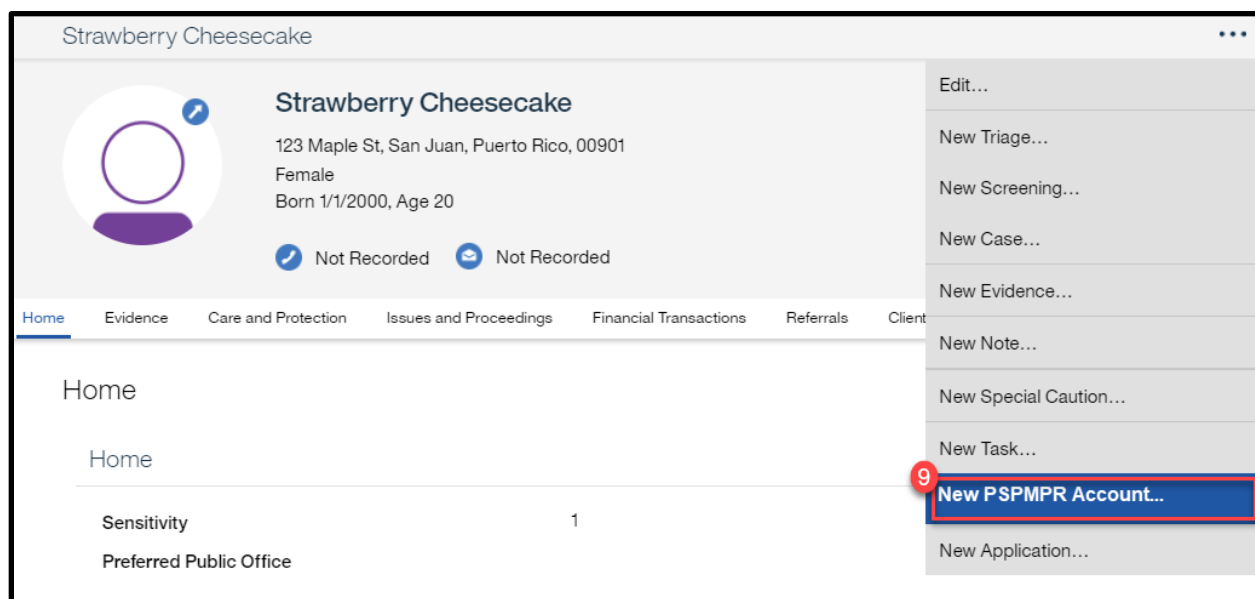




Figure 140: Disable PSPMPR Account

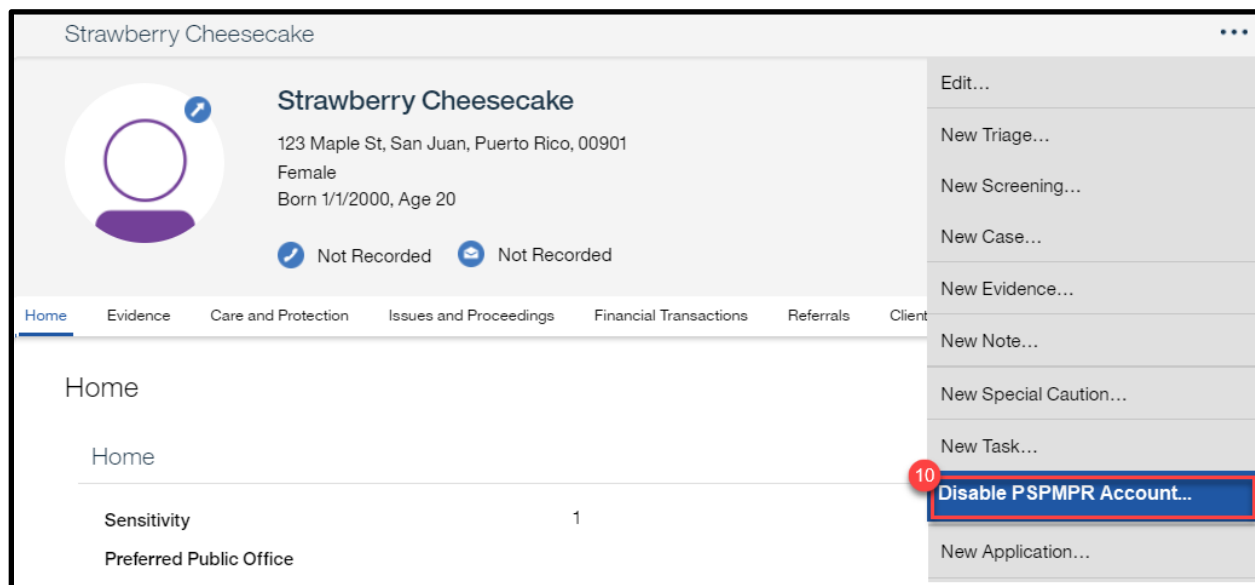
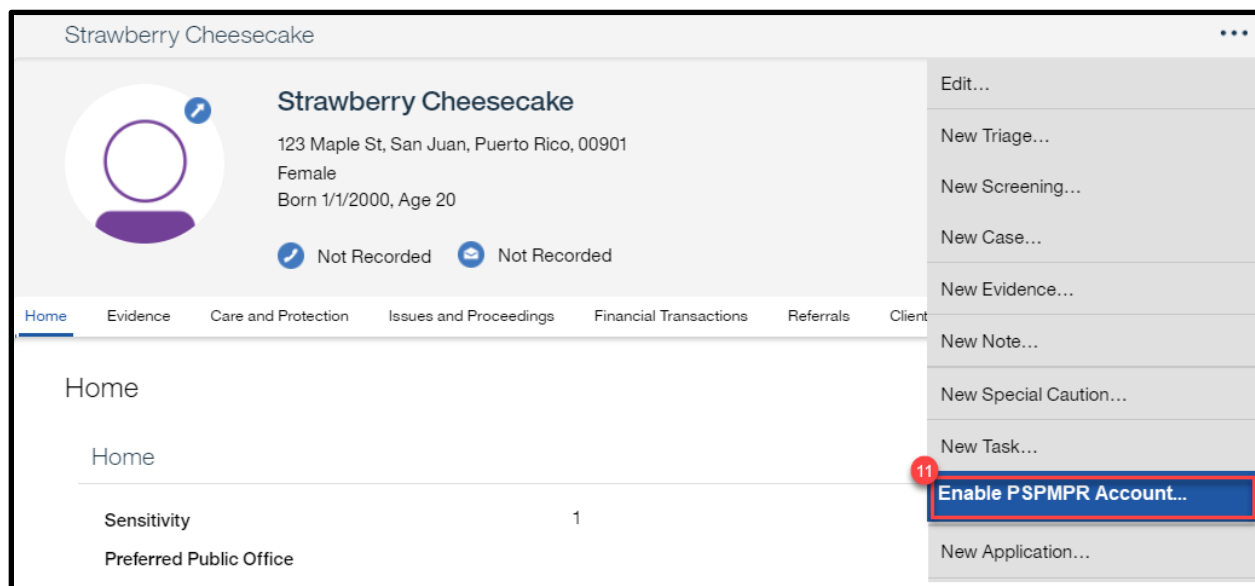


Figure 141: Enable PSPMPR Account



5.6.1.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Caseworker Portal Updates.xlsx	Person Action Menu

5.6.2 (Online COC) New PSPMPR Account

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

- A random one-time use password is generated.

Tech note: When the one-time use password is used the account should remain locked until the password is reset online by the user.
- The 'New PSPMPR Account with Temporary Password' notice is available for printing only.

Tech note: A random one-time use password should be generated. (2) Once used, the account should remain locked until the password is reset.
- Client will receive the 'New Account Notification'

Tech note: The OOTB email notification that was modified/replaced by the 'New PSPMPR Account' email notification
- Create the External User profile with the data from the Person profile. Create the Linked Participant record. Set ID Proofing status to Complete.

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

5.6.2.1 Screenshot (Modify)

Figure 142: New PSPMPR Account <CR189>

5.6.2.2 Description of Modifications and Additions

Details located in:

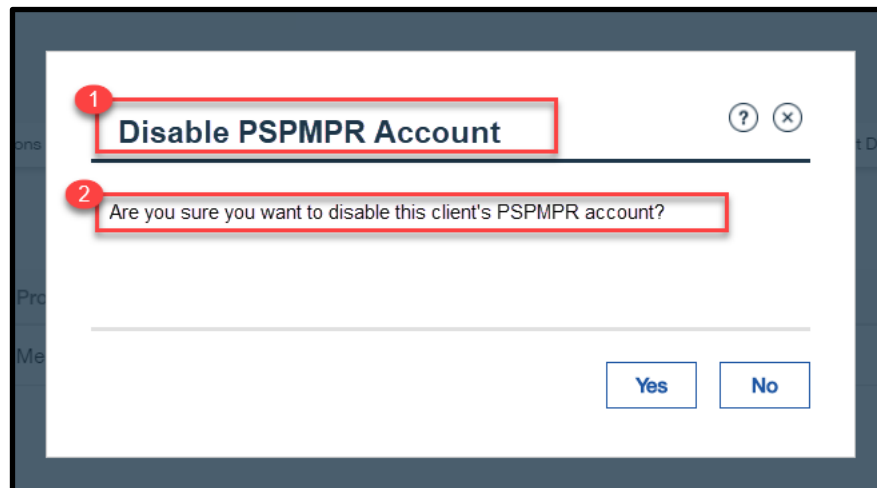
Document	Tab Name
Caseworker Portal Updates.xlsx	New PSPMPR Account

5.6.3 (Online COC) Disable PSPMPR Account

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

5.6.3.1 Screenshot (Modify)

Figure 143: Disable PSPMPR Account



5.6.3.2 Description of Modifications and Additions

Details located in:

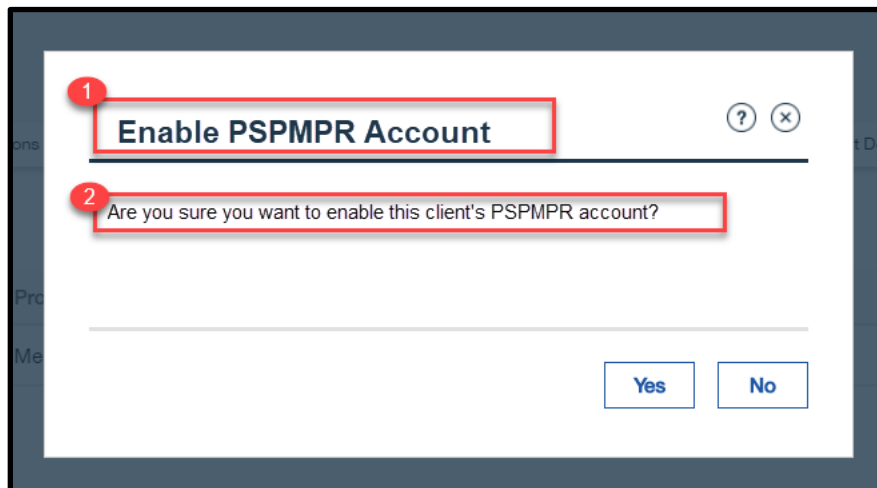
Document	Tab Name
Caseworker Portal Updates.xlsx	Disable PSPMPR Account

5.6.4 (Online COC) Enable PSPMPR Account

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

5.6.4.1 Screenshot (Modify)

Figure 144: Enable PSPMPR Account



5.6.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Caseworker Portal Updates.xlsx	Enable PSPMPR Account

5.7 Application Case

This section contains the tabs modified in the Application Case in the Caseworker Portal to support Citizen Portal.

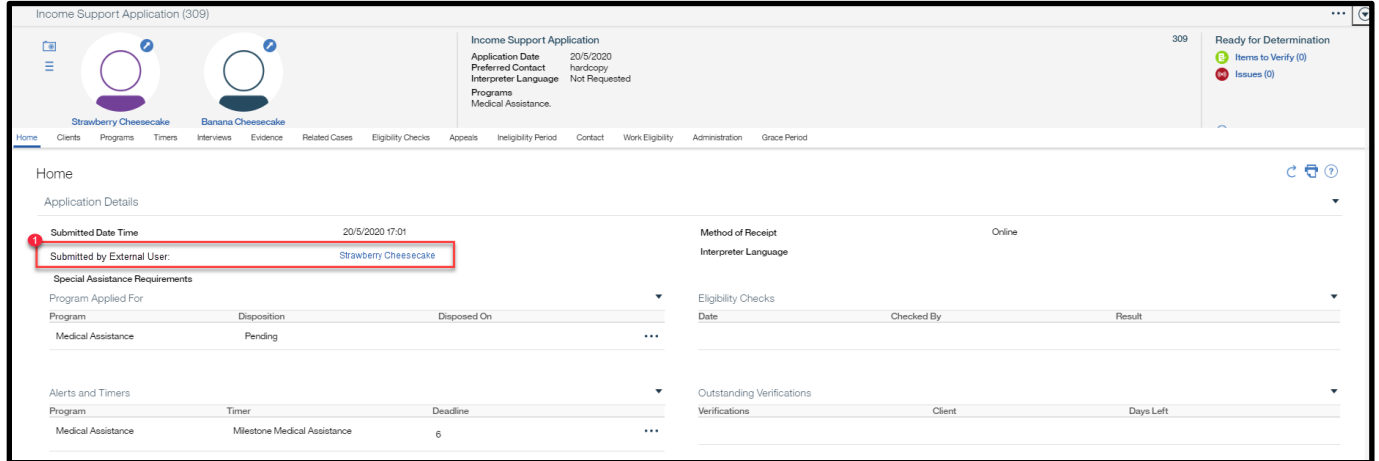
5.7.1 Application Home

The Application Home page is being modified to display a link to the External User that submitted the application.



5.7.1.1 Screenshot (Modify)

Figure 145: Application Home



5.7.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Caseworker Portal Updates.xlsx	Application Home

5.7.2 <CR-132> Attachments Uploaded Documents

Applicants will be given the opportunity to upload and submit supporting documents to support their online application. All the documents submitted will be available on the **Uploaded Documents** tab within the Verification section. ~~Attachments page on the Application Case.~~

5.7.2.1 Screenshot (Modify)

Figure 146: ~~Attachments-Uploaded Documents~~



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Income Support Application (50181)

Income Support Application
 Application Date: 8/9/2020
 Preferred Contact: Not Requested
 Interpreter Language: Not Requested
 Programs: Medical Assistance.

50181 Ready for Determination
 Items to Verify (5)
 Issues (0)
 ELIGIBILITY SPECIALIST

Verifications
 Outstanding All **1** Uploaded Documents

2	3	4	5
Item for Verification	Evidence Type	Participant	
Household Member Identity	Household Member	James LastName	6
State	Addresses	James LastName	7

8	9	10	11
Uploaded Documents	Date Received	Status	File Name
	11/8/2020	Active	Address-Proof.pdf
	11/8/2020	Active	Address-Proof_2_Reject.pdf

12 Reject Selected Document :

13 Do You want to reject the uploaded document?

14 Yes **15** No

5.7.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Caseworker Portal Updates.xlsx	Attachments-Uploaded Documents

5.8 External User

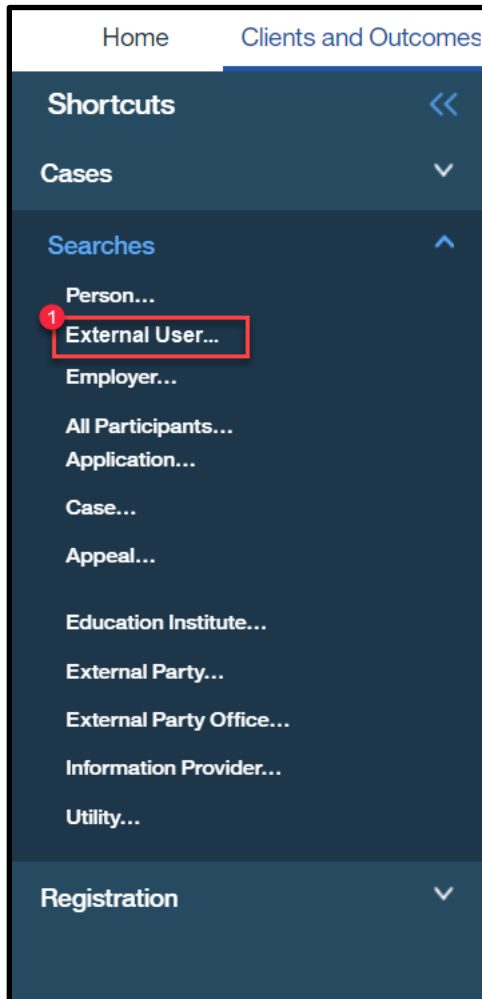
This section contains the modification being made to the External User case to support Citizen Portal.

5.8.1 Searches

The 'External User' link is now visible on the caseworker Searches panel. Caseworker can click on this link to access the 'External User Search'.

5.8.1.1 Screenshot (Modify)

Figure 147: Searches



5.8.1.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Caseworker Portal Updates.xlsx	Searches

5.8.2 External User Search

Caseworker can use the 'External User Search' page to search for a Citizen Portal User.



5.8.2.1 Screenshot (Modify)

Figure 148: External User Search (Admin)

External User Search

Search Criteria

First Name: strawberry

Last Name: []

User Name: []

Middle Name: []

Second Last Name: []

Role Name: []

Search Results (Items found: 3)

Action	Name	User Name
View	Strawberry Cheesecake	schesecake
View	Strawberry Cheesecake Lopez	sclopez123
View	Strawberry Cheesecake	Cheesecake

5.8.2.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Caseworker Portal Updates.xlsx	External User Search

5.8.3 (Online COC) <CR189> External User Home

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

5.8.3.1 Screenshot (Modify)

Figure 149: External User Home

Home

First Name: Strawberry

Last Name: Cheesecake

Date of Birth: 3/1/2000

Middle Name: []

Second Last Name: []

Social Security Number: []

Email Address: chesecake@aol.com

Phone Number: 123-345-6789

Identity Proofing Details

Completed by: eligibilityspecialist

Completion Date: 2/4/2021

5.8.3.2 Description of Modifications and Additions

Details located in:



Document	Tab Name
Caseworker Portal Updates.xlsx	External User Home

5.8.4 (Online COC) <CR189> Edit External User

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

5.8.4.1 Screenshot (Modify)

Figure 150: Edit External User

5.8.4.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Caseworker Portal Updates.xlsx	Edit External User

5.8.5 (Online COC) External User Attachment

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



5.8.5.1 Screenshot (Modify)

Figure 151: External User Attachments



5.8.5.2 Description of Modifications and Additions

Details located in:

Document	Tab Name
Caseworker Portal Updates.xlsx	External User Attachments

6 Batch Modifications

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

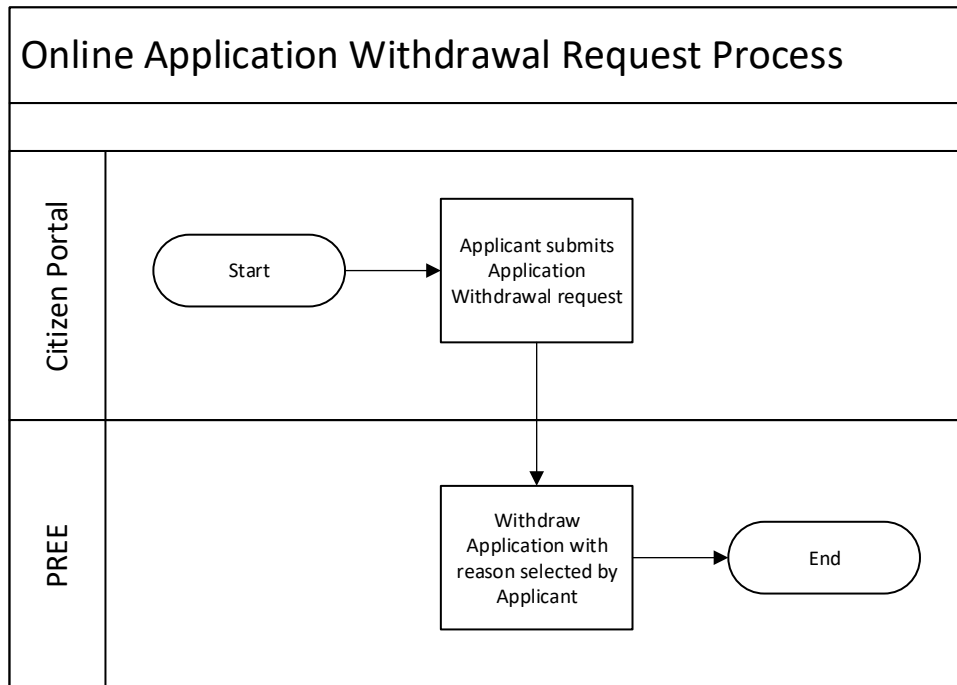
6.1 Online Application Withdrawal Request Process (New)

The purpose of this process is to systematically withdraw an application when requested via the Citizen Portal.



6.1.1 High Level Steps

Figure 152: Online Application Withdrawal Request Process



6.1.2 Predecessor

N/A

6.1.3 Successor

N/A

6.1.4 Execution Frequency

Withdrawal requested from Citizen Portal

6.1.5 Inputs

The inputs will be determined by the development team.

6.1.6 Outputs

The outputs will be determined by the development team.

6.1.7 Detailed Steps

- **IF** Applicant submits a Withdrawal Request via the Citizen Portal
- **THEN** Withdraw the application with the reason selected by the applicant



6.1.8 Control Report

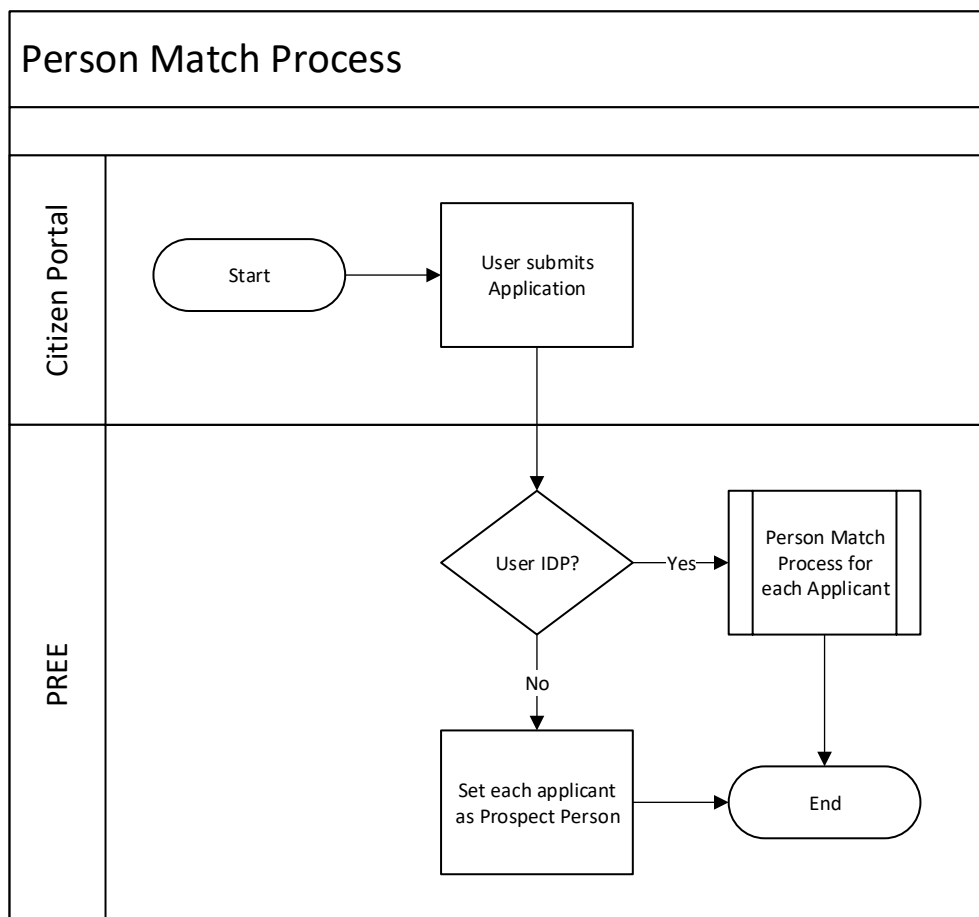
N/A

6.2 Person Search Process (Modify)

The purpose of this process is to prevent all applications with the identity of the primary applicant as 'unverified' from going through the Person Match process.

6.2.1 High Level Steps

Figure 153: Person Match Process



6.2.2 Predecessor

N/A



6.2.3 Successor

N/A

6.2.4 Execution Frequency

When an application is submitted from Citizen Portal

6.2.5 Inputs

The inputs will be determined by the development team.

6.2.6 Outputs

The outputs will be determined by the development team.

6.2.7 Detailed Steps

- **IF** User submits an application
- **AND IF** User completed CMS e-Authentication Level 3 IDP
- **THEN** Proceed with Person Match Process for each applicant
- **ELSE** Set each applicant as a Prospect Person

6.2.8 Control Report

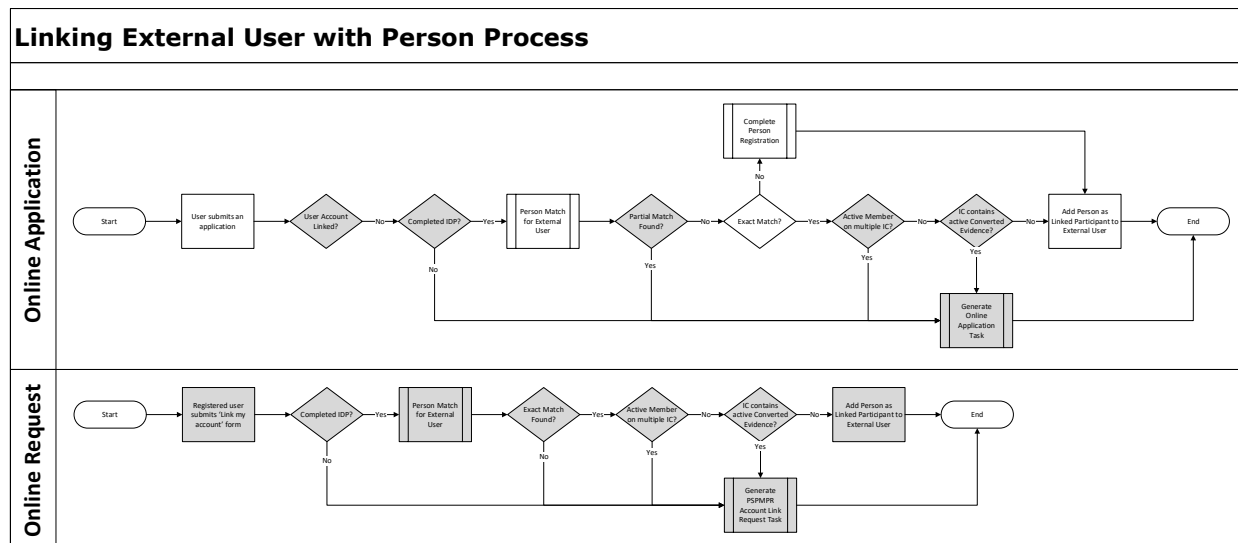
N/A

6.3 (Online COC) Linking External User with Person Process (Modify)

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

6.3.1 High Level Steps

Figure 154: Linking External User with Person Process <CR189>



6.3.2 Predecessor

N/A

6.3.3 Successor

N/A

6.3.4 Execution Frequency

<CR189> Real-time Nightly

6.3.5 Inputs

The inputs will be determined by the development team.

6.3.6 Outputs

The outputs will be determined by the development team.

6.3.7 Detailed Steps

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

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



3. IC doesn't have a Converted evidence without an end date (case is no longer in converted mode)
 - ◆ **THEN** Execute the following
 - ◆ Create a Linked Participant record with the following data:
 - External User's Relationship = Person
 - Participant = Person
 - ~~◆ Execute Finalizing Linking Process (Modify)~~
 - ~~◆ Generate 'Your Account Has Been Linked' notification~~
 - ◆ **ELSE** Generate Online Application Task
- **OR IF** The following is true after the Person Match Process is completed:
4. A No Match was found between External User and the existing Person participant records
 - ◆ **THEN** Execute the following
 - ◆ Complete Person Registration for the new person
 - ◆ Create a Linked Participant record with the following data:
 - External User's Relationship = Person
 - Participant = Person
 - ~~◆ Execute Finalizing Linking Process (Modify)~~
 - ~~◆ Generate 'Your Account Has Been Linked' notification~~
 - ◆ **ELSE** Generate Online Application Task

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

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

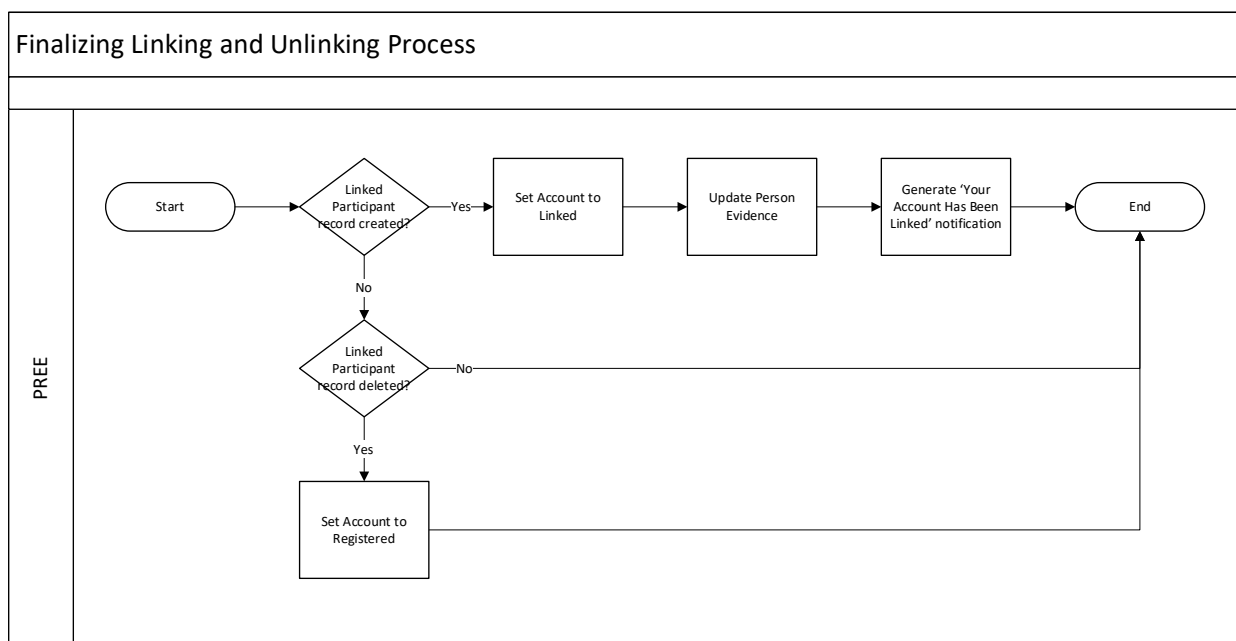


6.4 (Online COC) Finalizing Linking and Unlinking Process (Modify)

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

6.4.1 High Level Steps

Figure 155: Finalizing Linking and Unlinking Process <CR189>



6.4.2 Predecessor

(Online COC) Linking External User with Person Process (Modify)

6.4.3 Successor

(Online COC) No Touch Online Application Process (Modify)

6.4.4 Execution Frequency

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

- ~~When triggered by Nightly~~, After (Online COC) Linking External User with Person Process (Modify)
- When a caseworker creates a new Linked Participant record on the External User profile



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

6.4.5 Inputs

The inputs will be determined by the development team.

6.4.6 Outputs

The outputs will be determined by the development team.

6.4.7 Detailed Steps

- **IF** A Linked Participant record of type Person is added to the External User profile
 - ♦ **THEN** Set the External User Account Type to Linked **AND** Update Person’s evidence **AND** Generate ‘Your Account Has Been Linked’ notification.-as need. See table below.
- **ELSE IF** A Linked Participant record of type Person was deleted the External User profile
- **THEN** Set the External User Account Type to Registered

Table 7: Person Evidence Updates

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



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I.4.2.l.ii Completed Medicaid Application - Citizen Portal

External User Data		Person Evidences		Comments
Your Settings	Data	Evidence	Field: Data	
Language	<language>	Contact Preferences	Preferred Language: <language>	If evidence exist, then update evidence. Else, create new evidence
Paperless	Yes	Contact Preferences	Preferred Communication: Electronic/ Paperless	If evidence exist, then update evidence. Else, create new evidence
Paperless	No	Contact Preferences	Preferred Communication: Hard Copy	If evidence exist, then update evidence. Else, create new evidence

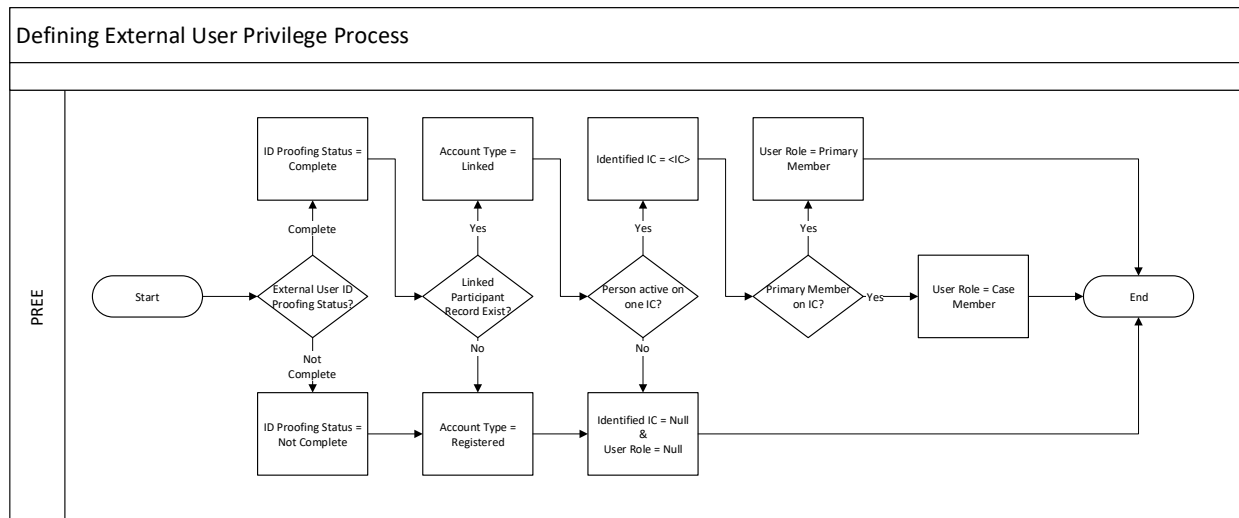
6.5 (Online COC) Defining External User Privilege Process (New)

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

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

6.5.1 High Level Steps

Figure 156: Defining External User Privilege Process



6.5.2 Predecessor

N/A

6.5.3 Successor

N/A

6.5.4 Execution Frequency

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

6.5.5 Inputs

The inputs will be determined by the development team.

6.5.6 Outputs

The outputs will be determined by the development team.

6.5.7 Detailed Steps

- **IF** External User ID Proofing Status is Complete
 - **THEN** IDProofingStatus = Complete
 - **ELSE** IDProofingStatus = Not Complete **AND** AccountType = Registered, IdentifiedIC = null **AND** UserRole = null
- **THEN IF** Participant Record exist for External User
 - **THEN** AccountType = Linked
 - **ELSE** AccountType = Registered



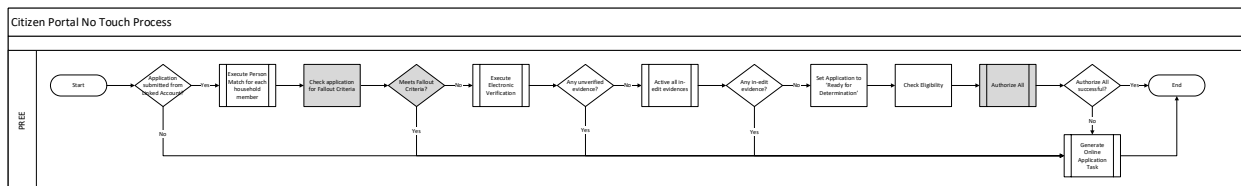
- **THEN IF** Person (Linked Participant) is on an active member on a single IC (number of Household Member Evidence without an end date = 1)
 - **THEN** IdentifiedIC = <Person’s IC>
 - **ELSE** IdentifiedIC = Null **AND** UserRole = Null
- **THEN IF** Person (Linked Participant) is the Primary Member on the IdentifiedIC
 - **THEN** UserRole = Primary Member
 - **ELSE** UserRole = Case Member

6.6 (Online COC) No Touch Online Application Process (Modify)

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

6.6.1 High Level Steps

Figure 157: Citizen Portal No Touch Process <CR189>



6.6.2 Predecessor

(Online COC) Defining External User Privilege Process (New)

6.6.3 Successor

N/A

6.6.4 Execution Frequency

Nightly

6.6.5 Inputs

The inputs will be determined by the development team.

6.6.6 Outputs

The outputs will be determined by the development team.



6.6.7 Detailed Steps

- **IF** the application was submitted from a Linked Account
 - **THEN**
 - Execute the Person Match for each household member
 - Check application for Fallout Criteria (see below for criteria)
 - **THEN IF** the application meets Fallout Criteria
 - **THEN** Fallout the process and generate 'Online Application Task'
 - **ELSE** Execute the Electronic Verification process
 - **THEN IF** Any evidence is unverified
 - **THEN** Fallout the process and generate 'Online Application Task'
 - **ELSE** Activate each in-edit evidence
 - **THEN IF** There is any in-edit evidence
 - **THEN** Fallout the process and generate 'Online Application Task'
 - **ELSE**
 - Set Application to 'Ready for Determination'
 - Check Eligibility
 - Authorize All
 - **THEN IF** Authorize All was NOT successful
 - **THEN** Fallout the process and generate 'Online Application Task'

- ~~▪ **IF** application was submitted via Citizen Portal~~
- ~~▪ **AND IF** application was submitted from a Linked Account~~
- ~~▪ **AND IF** application does NOT meet one of the Fallout Criteria

 - ~~▪ **THEN** Execute Electronic Verification~~
 - ~~▪ **ELSE** Fallout the process and generate 'Online Application Task'~~~~
- ~~▪ **THEN IF** All the evidences are verified

 - ~~▪ **THEN** Apply changes to all the in-Edit Evidence

 - ~~• **AND THEN** Setting the application status to 'Ready For Determination'~~
 - ~~• **AND THEN** Execute the Auto-assessment and Authorization Process (See Enhanced Workload FDD for more information)~~~~
 - ~~▪ **ELSE** Fallout the process and generate 'Online Application Task'~~~~

OR

- ~~▪ **IF** application was submitted via Citizen Portal~~
- ~~▪ **AND IF** application was submitted from a Registered Account~~



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- ~~THEN~~ Execute Linking External User Process
- ~~THEN~~ Execute Person Match Process for other case members on the application
- ~~AND IF~~ application does NOT meet one of the Fallout Criteria
 - ~~THEN~~ Execute Electronic Verification
 - ~~ELSE~~ Fallout the process and generate 'Online Application Task'
- ~~THEN IF~~ All the evidences are verified
 - ~~THEN~~ Apply changes to all the in Edit Evidence
 - ~~AND THEN~~ Setting the application status to 'Ready For Determination'
 - ~~AND THEN~~ Execute the Auto assessment and Authorization Process (See Enhanced Workload FDD for more information)
 - ~~ELSE~~ Fallout the process and generate 'Online Application Task'

Fallout Criteria:

- Prospect Person exist
- Sensitive Application (See Citizen Portal FDD for more information)
- Completed a blank application (application was not prepopulated)
- Medical Expense record with start date greater than 3 months from application month exist

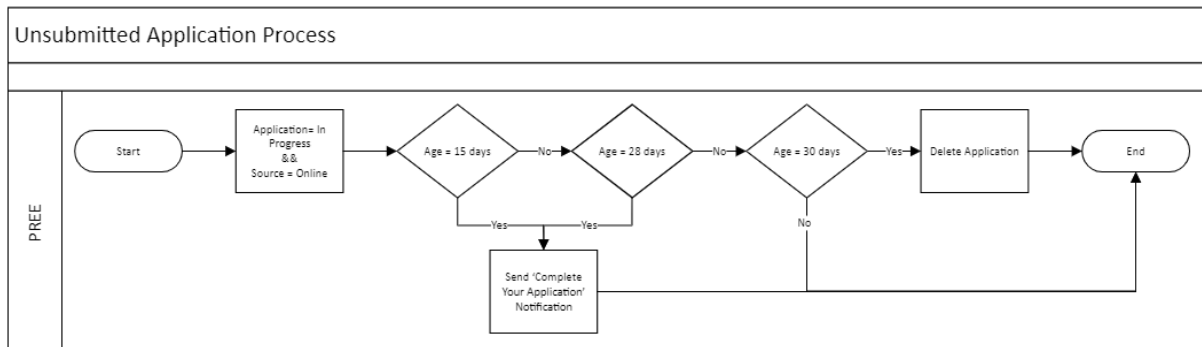
6.7 (Online COC) Unsubmitted Application Process (New)

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



6.7.1 High Level Steps

Figure 158: Unsubmitted Application Process



6.7.2 Predecessor

N/A

6.7.3 Successor

N/A

6.7.4 Execution Frequency

Daily.

6.7.5 Inputs

The inputs will be determined by the development team.

6.7.6 Outputs

The outputs will be determined by the development team.

6.7.7 Detailed Steps

- **IF** an application has been saved in the Citizen Portal
- **AND IF** $\text{current_date} - \text{application_create_date} = 15$
 - **THEN** send 'Complete Your Application' Notification
- **ELSE IF** $\text{current_date} - \text{application_create_date} = 28$
 - **THEN** send 'Complete Your Application' Notification
- **ELSE IF** $\text{current_date} - \text{application_create_date} = 30$
 - **THEN** Delete the application

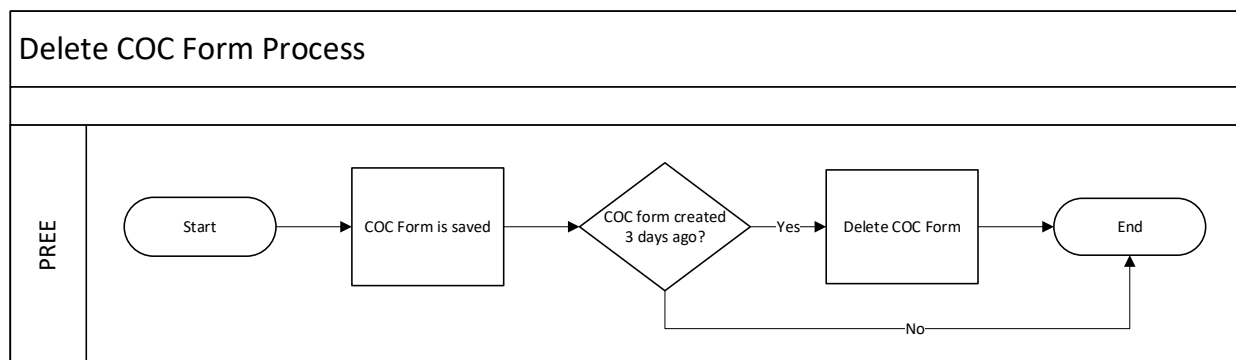


6.8 (Online COC) <CR189> Unsubmitted COC Process (New)

The purpose of the Unsubmitted COC process is to delete COC form not submitted after 3 days.

6.8.1 High Level Steps

Figure 159: Unsubmitted COC Process



6.8.2 Predecessor

N/A

6.8.3 Successor

N/A

6.8.4 Execution Frequency

Daily

6.8.5 Inputs

The inputs will be determined by the development team.

6.8.6 Outputs

The outputs will be determined by the development team.

6.8.7 Detailed Steps

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



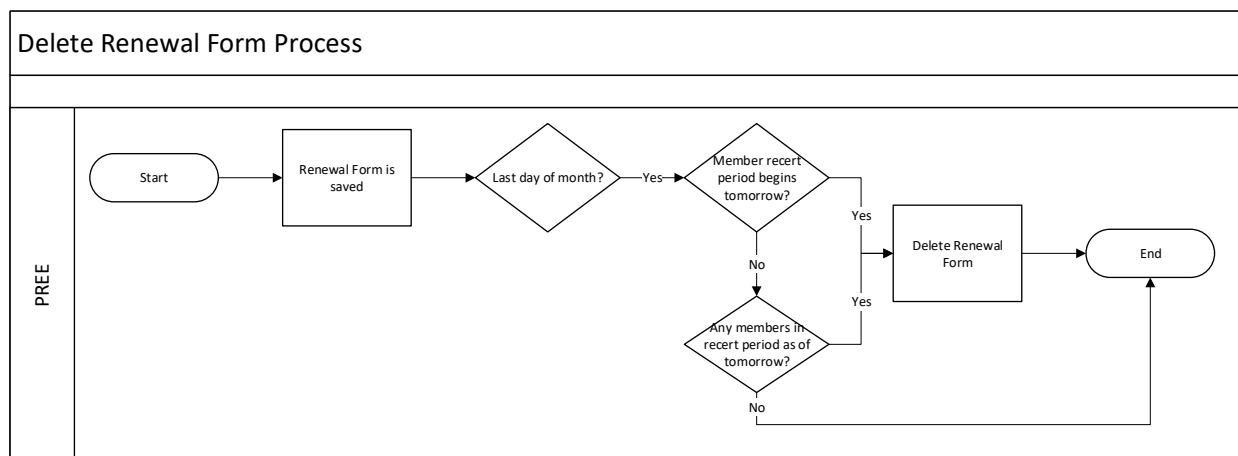
6.9 (Online COC) Delete Renewal Form (New)

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

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

6.9.1 High Level Steps

Figure 160: Delete Renewal Form Process



6.9.2 Predecessor

N/A

6.9.3 Successor

N/A

6.9.4 Execution Frequency

Daily.

6.9.5 Inputs

The inputs will be determined by the development team.

6.9.6 Outputs

The outputs will be determined by the development team.

6.9.7 Detailed Steps

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



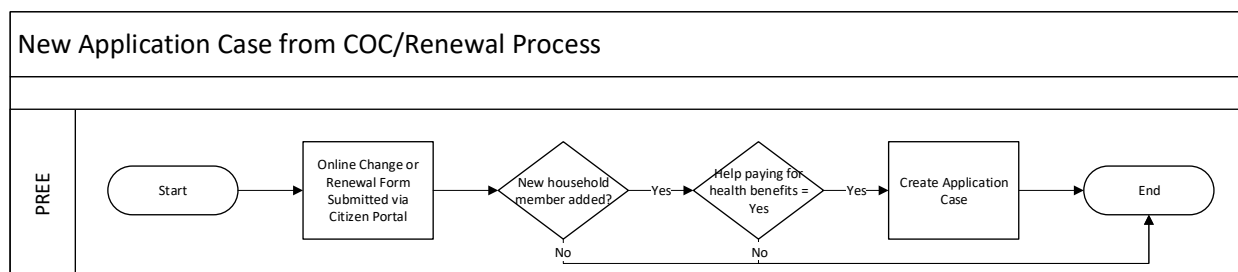
- **AND IF** Last day of the month
- **AND IF** Another member recertification period begins tomorrow
 - **THEN** Delete renewal form
- OR**
- **IF** Renewal form has been saved in the Citizen Portal
- **AND IF** Last day of the month
- **AND IF** No member in recertification period as of tomorrow
 - THEN** Delete renewal form

6.10 (Online COC) New Application Case from COC/Renewal Process (New)

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

6.10.1 High Level Steps

Figure 161: New Application Case from COC/Renewal Process



6.10.2 Predecessor

N/A

6.10.3 Successor

N/A

6.10.4 Execution Frequency

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

6.10.5 Inputs

The inputs will be determined by the development team.

6.10.6 Outputs

The outputs will be determined by the development team.



6.10.7 Detailed Steps

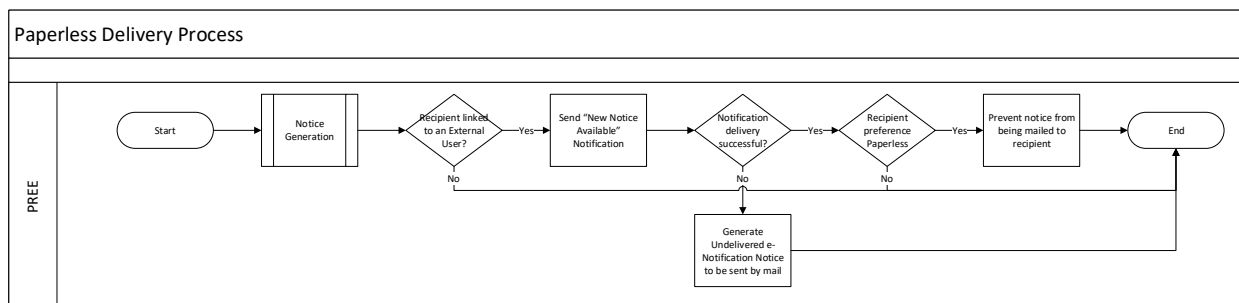
- **IF** Online Change or Renewal Form Submitted via Citizen Portal
- **AND IF** New household member was added
- **AND IF** Yes was selected for help paying for health benefits for the new household member
- **THEN** Create a new Application Case on the IC associated with the External User.

6.11 (Online COC) Paperless Delivery Process (New)

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

6.11.1 High Level Steps

Figure 162: Paperless Delivery Process



6.11.2 Predecessor

N/A

6.11.3 Successor

Central Print Notice Mailing

6.11.4 Execution Frequency

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

6.11.5 Inputs

The inputs will be determined by the development team.

6.11.6 Outputs

The outputs will be determined by the development team.



6.11.7 Detailed Steps

WHEN Notice is generated

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

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

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

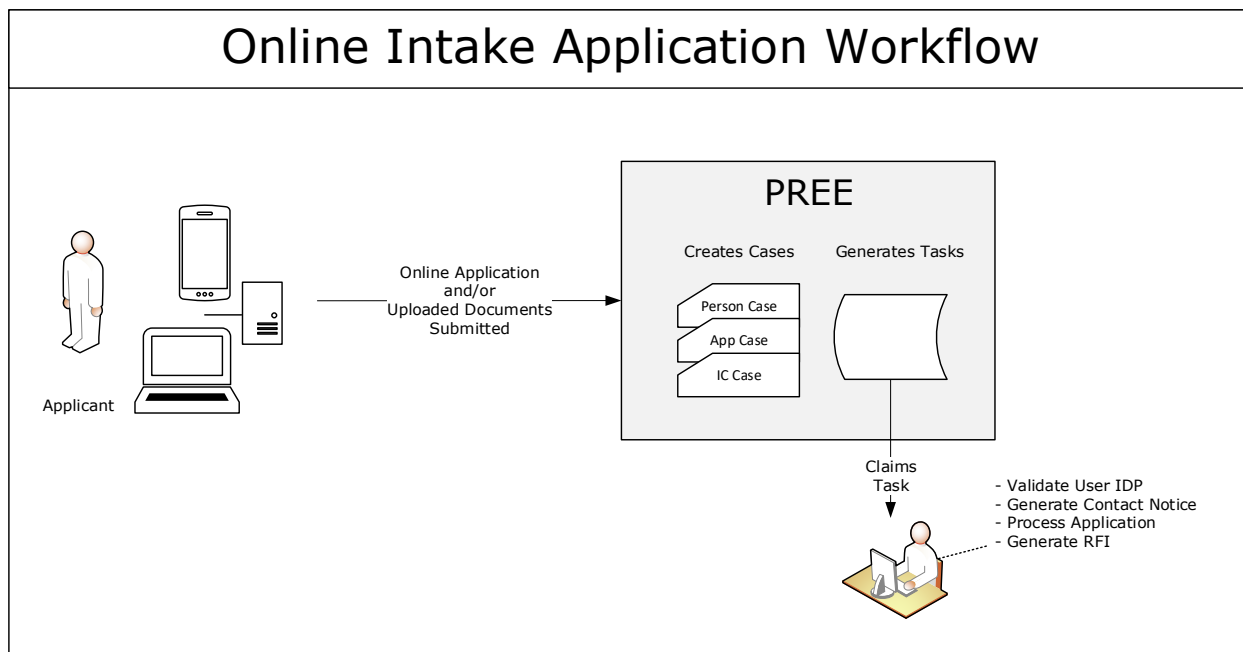
7 Tasks, Alerts, Work Queues

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

7.1 Online Intake Application Workflow

PREE will trigger tasks during the intake process when applications and supporting documents are submitted via the Citizen Portal. Tasks will be routed as depicted in the workflow diagram below.

Figure 163: Online Intake Application Workflow



7.2 Tasks

Tasks are generated to alert a worker that some action(s) must be taken. The section below contains a list of tasks

7.2.1 (Online COC) Online Application Task (Modify)

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

Table 8: Online Application

| | | |
|---|---|-------------------------------|
| Task <input checked="" type="checkbox"/> | Notification <input type="checkbox"/> | Name: Online Application Task |
| Purpose: To notify the Caseworker that an application has been submitted within the Citizen Portal | | |
| Trigger(s): As indicated in the (Online COC) Linking External User with Person Process (Modify) and Citizen Portal No Touch Process (New) processes. | | |
| Allocation Type | Citizen <input type="checkbox"/> Position <input type="checkbox"/> Job <input type="checkbox"/> Org Unit <input type="checkbox"/> Queue <input checked="" type="checkbox"/> | |
| Allocation Strategy | IF the application meets the Sensitive Applicant criteria: | |



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| | | |
|---------------------------------------|---|---|
| | <ul style="list-style-type: none"> ▪ At least one applicant living arrangement is OPM ▪ At least one applicant living arrangement is Forensic Psychiatry ▪ At least one applicant is in Foster Care <p>THEN place task in the Central Office Work Queue.</p> <p>ELSE IF Primary Applicant’s residential address is in PR</p> <p>THEN place this task in the appropriate regional Work Queue based on the region of the residential address.</p> <p>ELSE place task in regional Work Queue at random.</p> | |
| Links | Link | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Primary Action Link | None |
| | Supporting Information Link | View Application
View External User |
| Subject | Subject Text | Online Application <Application #> for <Primary Applicant Name> |
| Task Details | Deadline Strategy | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Deadline Strategy Details | 10 days |
| | Escalation Strategy | |
| | Deadline Override Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| | Task Priority | Low <input type="checkbox"/> Medium <input checked="" type="checkbox"/> High <input type="checkbox"/> |
| | Manual Forwarding Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Task/Notification Body Details | Message Body Text | <p>An application has been submitted for <Primary Applicant Name> within the Citizen Portal by <External User’s Name> .</p> <p><Sensitive Applicant Snippet></p> <p><Medical Expense Snippet></p> |



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| | | |
|---|--|---------------------------------------|
| | | <CR189> <Authorization Issue Snippet> |
| <p>Other special processing instructions:</p> <p>Include the <Medical Expense Snippet> snippet when the includes a Medical Expense with a start date greater than 3 months and less than 16 months from the application date.</p> <ul style="list-style-type: none"> ▪ Medical Expense Snippet: This application contains a medical expense that is older than 3 months. Please follow up with the applicant to verify the information on the case is accurate for that given period to ensure proper evaluation of benefits. <p>Include the <Authorization Issue Snippet> snippet when an applicant eligibility decision cannot be authorized.</p> <ul style="list-style-type: none"> ▪ Authorization Issue Snippet: <Applicant name> decision could not be authorized. <Error message> | | |

7.2.2 <CR-132> Evidence for Verification Document Received Online Task (Modify)

Table 9: Document Received Online

| | |
|---|---|
| Task <input checked="" type="checkbox"/> Notification <input type="checkbox"/> Name: Evidence for Verification Document Received Online Task | |
| <p>Purpose: To notify the Caseworker that an applicant has submitted supporting documents via their Citizen Portal account.</p> | |
| <p>Trigger(s): No change All the following was met</p> <ol style="list-style-type: none"> 1. Document(s) was submitted by a citizen via their Citizen Portal account against a pending decision online application 2. The 'Online Application Task' was generated and has been assigned to a caseworker (regardless of status) | |
| <p>Allocation Type</p> | User <input type="checkbox"/> Position <input type="checkbox"/> Job <input type="checkbox"/> Org Unit <input type="checkbox"/> Queue <input checked="" type="checkbox"/> |
| <p>Allocation Strategy</p> | <p>IF the 'Online Application Task' status is NOT closed
 THEN assign the task to the caseworker assigned to that task
 ELSE place task in the Work Queue the 'Online Application Task' was placed in.</p> |



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| | | |
|--|-----------------------------|---|
| Links | Link | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Primary Action Link | None |
| | Supporting Information Link | No change View Attachments |
| Subject | Subject Text | No change Documents Received Online <Application #> for <Primary Applicant Name> |
| Task Details | Deadline Strategy | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Deadline Strategy Details | 10 days |
| | Escalation Strategy | |
| | Deadline Override Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| | Task Priority | Low <input type="checkbox"/> Medium <input checked="" type="checkbox"/> High <input type="checkbox"/> |
| | Manual Forwarding Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Task/Notification Body Details | Message Body Text | No change. The task will look like the screenshot below. Supporting documents have been submitted via the Citizen Portal and are available to be viewed within the Application Attachments page. |
| Other special processing instructions:
Navigate to the Application/Contact/Attachments page when <View Attachments> link is clicked. | | |



I.4.2.p.ii Completed Citizen Mobile App I.4.2.1.ii Completed Medicaid Application - Citizen Portal

The screenshot shows a task card for 'Task 512' with status 'Open' and priority 'Medium'. Below the card is a table titled 'Evidence for Verification' with the following data:

| Ready for Verification | Case Member | Case Reference | Evidence Type | Verifiable Data Item | Submitted Document(s) |
|------------------------|---------------|----------------|-------------------------|---------------------------|-----------------------------------|
| ✓ | Jill LastName | 1281 | Household Member | Household Member Identity | VerificationDoc_1.pdf |
| ✓ | Jill LastName | 1281 | Addresses | State | VerificationDoc_1.pdf |
| ✓ | Jill LastName | 1281 | Addresses | State | VerificationDoc_1.pdf |
| ✓ | Jill LastName | 1281 | Addresses | State | Sanctions Policy.pdf |
| ✓ | Jill LastName | 1281 | Identifications | SSN | VerificationDoc_1.pdf |
| ✓ | Jill LastName | 1281 | Identifications | SSN | VerificationDoc_1.pdf |
| ✓ | Jill LastName | 1281 | Birth and Death Details | Date of Birth | VerificationDoc_1.pdf |
| ✓ | Jill LastName | 1281 | Birth and Death Details | Date of Birth | Security Policy for Employees.pdf |

7.2.3 Online Withdrawal Request Task (Remove)

The Online Withdrawal Request Task is a task generated when an applicant requests to withdraw an application submitted via the Citizen Portal. This task is being removed because in PREE when an applicant submits an online withdrawal request, it will be automatically withdrawn, without intervention from the caseworker.

7.2.4 (Online COC) PSPMPR Account Link Request Task (New)

Table 10: PSPMPR Account Link Request Task

| | | |
|--|---------------------------------------|--|
| Task <input checked="" type="checkbox"/> | Notification <input type="checkbox"/> | Name: PSPMPR Account Link Request Task |
| Purpose: To notify the Caseworker a user has submitted a request to link their account with their case in PREE. | | |
| Trigger(s): The 'Link My Account' form was submitted AND was not completed systematically due to: | | |
| <ol style="list-style-type: none"> 1. User failed Remote Identity Proofing (RIDP) 2. Exact Match not found 3. Exact Match found and Person is an active member on a single IC (only one Household Member evidence without an end date) and that IC with an active Converted Evidence 4. Exact Match found and Person is an active member on multiple ICs (more than one Household Member evidence without an end date) | | |
| See (Online COC) Linking External User with Person Process (Modify) for more information about the process and task trigger. | | |



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| | | |
|---------------------------------------|---|--|
| Category | Application <input type="checkbox"/> Renewal <input type="checkbox"/> COC <input type="checkbox"/> Other <input checked="" type="checkbox"/> Interface <input type="checkbox"/> | |
| Allocation Type | Citizen <input type="checkbox"/> Position <input type="checkbox"/> Job <input type="checkbox"/> Org Unit <input type="checkbox"/> Queue <input checked="" type="checkbox"/> | |
| Allocation Strategy | <p>IF External User's address is in PR</p> <p>THEN place this task in the appropriate regional Work Queue based on the region of the address.</p> <p>ELSE place task in regional Work Queue at random.</p> | |
| Links | Link | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Primary Action Link | None |
| | Supporting Information Link | View External User |
| Subject | Subject Text | <External User> submitted a request to link account |
| Task Details | Deadline Strategy | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Deadline Strategy Details | 10 days |
| | Escalation Strategy | N/A |
| | Deadline Override Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| | Task Priority | Low <input type="checkbox"/> Medium <input checked="" type="checkbox"/> High <input type="checkbox"/> |
| | Manual Forwarding Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Task/Notification Body Details | Message Body Text | <p>If the person meets reason (1) <CR189> OR (2), then display the following message:</p> <p>We were not able to identify <User's Name>. Please complete the Link Account process for PSPMPR user <User's username>.</p> |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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

Other special processing instructions:

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

<User's username>

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

7.2.5 (Online COC) Online COC Task (Modify)

Table 11: Online COC

| | | |
|--|---------------------------------------|-----------------------|
| Task <input checked="" type="checkbox"/> | Notification <input type="checkbox"/> | Name: Online COC Task |
|--|---------------------------------------|-----------------------|



I.4.2.p.ii Completed Citizen Mobile App
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| | | |
|--|---|---|
| Purpose: To notify the Caseworker that a COC was reported and submitted via the Citizen Portal. | | |
| Trigger(s): When a COC Form was submitted within the Citizen Portal. | | |
| Category | Application <input type="checkbox"/> Renewal <input type="checkbox"/> COC <input checked="" type="checkbox"/> Other <input type="checkbox"/> Interface <input type="checkbox"/> | |
| Allocation Type | Citizen <input type="checkbox"/> Position <input type="checkbox"/> Job <input type="checkbox"/> Org Unit <input type="checkbox"/> Queue <input checked="" type="checkbox"/> | |
| Allocation Strategy | <p>IF Primary Applicant’s residential address is in PR
 THEN place this task in the appropriate regional Work Queue based on the region of the residential address.
 ELSE place task in regional Work Queue at random.</p> | |
| Links | Link | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Primary Action Link | None |
| | Supporting Information Link | View External User
View IC
View Application (only if a new applicant was added) |
| Subject | Subject Text | Online COC submitted for <IC> |
| Task Details | Deadline Strategy | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Deadline Strategy Details | 10 days |
| | Escalation Strategy | N/A |
| | Deadline Override Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| | Task Priority | Low <input type="checkbox"/> Medium <input checked="" type="checkbox"/> High <input type="checkbox"/> |
| | Manual Forwarding Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Task/Notification Body Details | Message Body Text | A change was reported for <IC#> within the Citizen Portal by <External User Name>. |



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| | | |
|---|--|-------------------------|
| | | <New Applicant Snippet> |
| <p>Other special processing instructions:</p> <p>Include the <New Applicant> snippet when a new household member was added and is applying for benefits.</p> <ul style="list-style-type: none"> ▪ New Applicant Snippet: A new applicant was also added to the case. Please view Application <Application #> and process the application along with the changes reported. Once processed, return to the case to complete the change process. | | |

7.2.6 (Online COC) Online Renewal Task (Modify)

Table 12: Online Renewal

| | | |
|---|---|---|
| Task <input checked="" type="checkbox"/> | Notification <input type="checkbox"/> | Name: Online Renewal Task |
| <p>Purpose: To notify the Caseworker that a Renewal Form was completed and submitted via the Citizen Portal.</p> | | |
| <p>Trigger(s): When a Renewal Form was submitted within the Citizen Portal.</p> | | |
| Category | Application <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> COC <input type="checkbox"/> Other <input type="checkbox"/> Interface <input type="checkbox"/> | |
| Allocation Type | Citizen <input type="checkbox"/> Position <input type="checkbox"/> Job <input type="checkbox"/> Org Unit <input type="checkbox"/> Queue <input checked="" type="checkbox"/> | |
| Allocation Strategy | <p>IF Primary Applicant’s residential address is in PR
 THEN place this task in the appropriate regional Work Queue based on the region of the residential address.
 ELSE place task in regional Work Queue at random.</p> | |
| Links | Link | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Primary Action Link | None |
| | Supporting Information Link | View External User
View IC
View Application (only if a new applicant was added) |



| | | |
|---|---------------------------|---|
| Subject | Subject Text | Online Renewal Form completed for <IC> |
| Task Details | Deadline Strategy | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |
| | Deadline Strategy Details | 10 days |
| | Escalation Strategy | N/A |
| | Deadline Override Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| | Task Priority | Low <input type="checkbox"/> Medium <input checked="" type="checkbox"/> High <input type="checkbox"/> |
| | Manual Forwarding Allowed | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Task/Notification Body Details | Message Body Text | A Renewal Form was completed within the Citizen Portal by <External User Name> for:
<List all the members in the recert period>
<New Applicant Snippet> |
| Other special processing instructions: | | |
| <p>Include the <New Applicant> snippet when a new household member was added and is applying for benefits.</p> <ul style="list-style-type: none"> ▪ New Applicant Snippet: A new applicant was also added to the case. Please view Application <Application #> and process the application along with the changes reported. Once processed, return to the case to complete the renewal process. | | |

8 Notifications

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

- Registered Accounts: on the External User's communication language preference.

- **Linked Accounts:** on the Person’s preferred language preference selected on the Contact Preferences evidence.

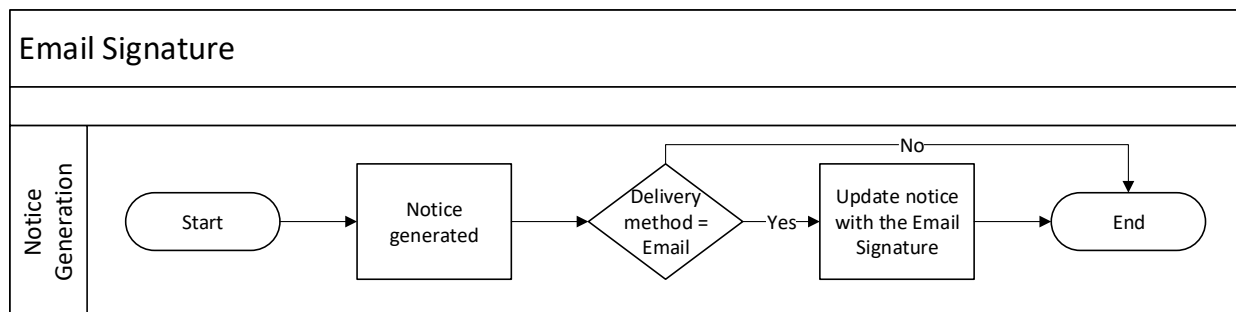
Notifications can be sent using either by email, SMS text message, or both. - <Pending Decision EE-DL00271>

8.1 Email Signature (New)

The Email Signature is to be included at the end of each outbound email. When a notice is to be sent by email, then update the notice to include the Email Signature.

8.1.1 Generation Details

Figure 164: Email Signature



8.1.2 Layout

| | |
|------------------|---|
| English Verbiage | This is an automatically-generated message, please do not reply.

Sincerely,
Puerto Rico Department of Health – Medicaid Program |
| Spanish Verbiage | Este es un mensaje generado automáticamente, favor de no responder.

Cordialmente,
Departamento de Salud de Puerto Rico – Programa Medicaid |

8.1.3 Expected Values

N/A

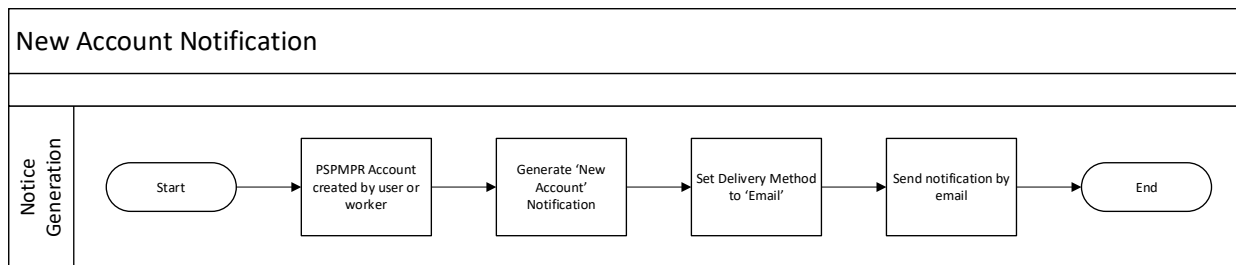


8.2 New Account Notification (Modify)

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

8.2.1 Generation Details

Figure 165: New Account Notification <CR189>





8.2.2 Layout

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

8.2.3 Expected Values

| # | Value | Attribute | Comments |
|---|-----------------------|--|----------|
| 1 | <Person’s First Name> | First name entered on the ‘Sign up’ page | |
| 2 | <username> | Username entered on the ‘Sign up’ page | |

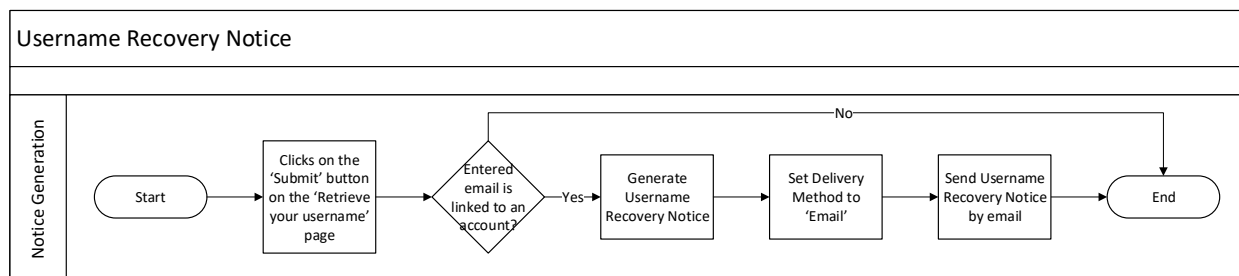


8.3 Username Recovery Notification (Modify)

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

8.3.1 Generation Details

Figure 166: Username Recovery Notice



8.3.2 Layout

| | | |
|------------------|----------|---|
| English Verbiage | Subject: | Username Recovery |
| | Body: | You have requested your log in details. Your login details are:

Username: <username>

We advise that you change your password the next time you log in to your PSPMPR account. |
| Spanish Verbiage | Subject: | Recuperación de Su Usuario |
| | Body: | Ha solicitado sus datos de log in. Sus datos de login son:

Usuario: <username>

Le recomendamos que cambie su contraseña la próxima vez que haga log in a su cuenta en PSPMPR. |

8.3.3 Expected Values

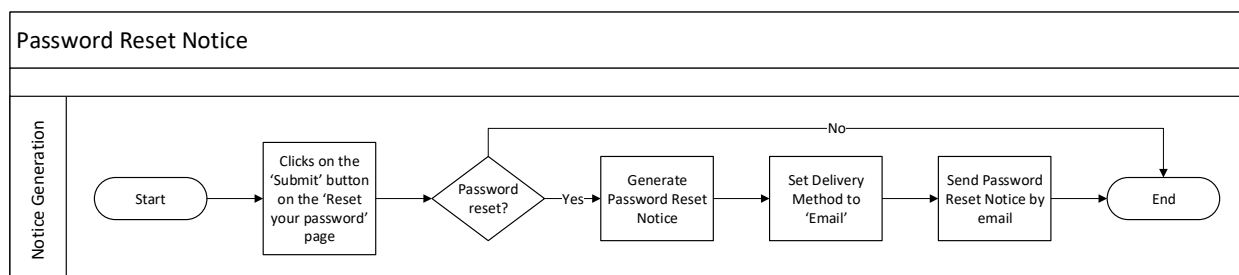
| # | Value | Attribute | Comments |
|---|------------|---|----------|
| 1 | <username> | Username linked to the email address entered on the 'Retrieve your username' page | |

8.4 Password Reset Notification (Modify)

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

8.4.1 Generation Details

Figure 167: Password Reset Notice



8.4.2 Layout

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

8.4.3 Expected Values

N/A

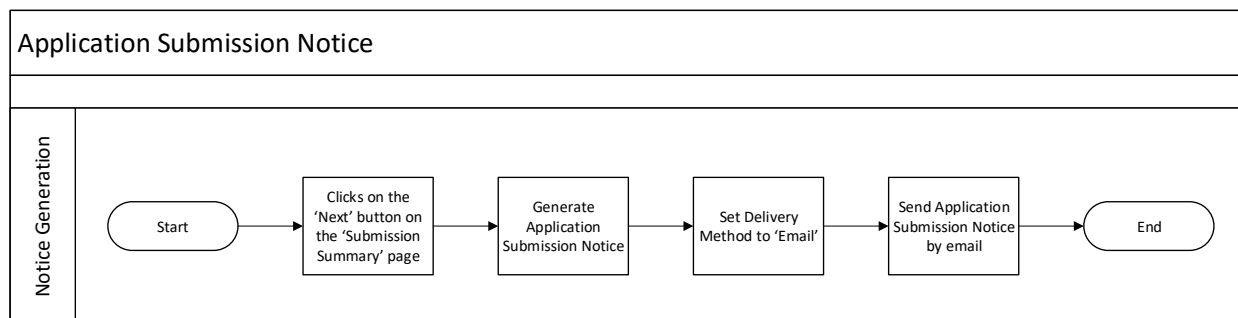
8.5 Application Submission Notification (Modify)

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



8.5.1 Generation Details

Figure 168: Application Submission Notice



8.5.2 Layout

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



8.5.3 Expected Values

| # | Value | Attribute | Comments |
|---|---------------------------|----------------------------------|----------|
| 1 | <ApplicationReferenceNum> | The application reference number | |

8.6 (Online COC) Complete Your Application Form Notification (New)

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

8.6.1 Generation Details

See (Online COC) Unsubmitted Application Process (New) for generation details

8.6.2 Layout

Figure 169: Complete Your Application Notification

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



8.6.3 Expected Values

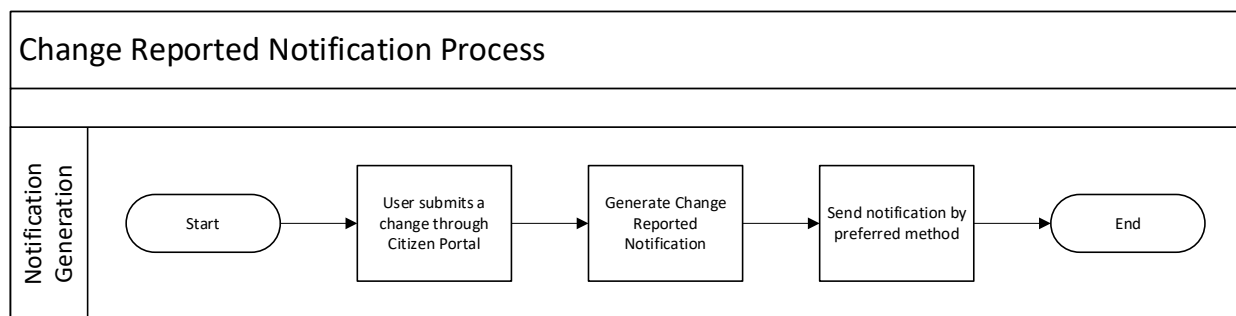
| # | Value | Attribute | Comments |
|---|----------------|--|--|
| 1 | <date_deleted> | The date on which the application/renewal will be automatically deleted. | See (Online COC) Unsubmitted Application Process (New) for details |

8.7 (Online COC) Change Reported Notification (New)

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

8.7.1 Generation Details

Figure 170: Change Reported Notification



8.7.2 Layout

| | | |
|------------------|----------|--|
| English Verbiage | Subject: | Change Reported |
| | Body: | We have received your reported change. Once the change has been processed, you will receive a Notice of Decision.

We will contact you if further information is needed. |
| Spanish Verbiage | Subject: | Cambio Notificado |
| | Body: | Hemos recibido su notificación de cambio. Una vez se haya procesado, recibirá un Aviso de Decisión.

De necesitar información adicional nos comunicaremos con usted. |



8.7.3 Expected Values

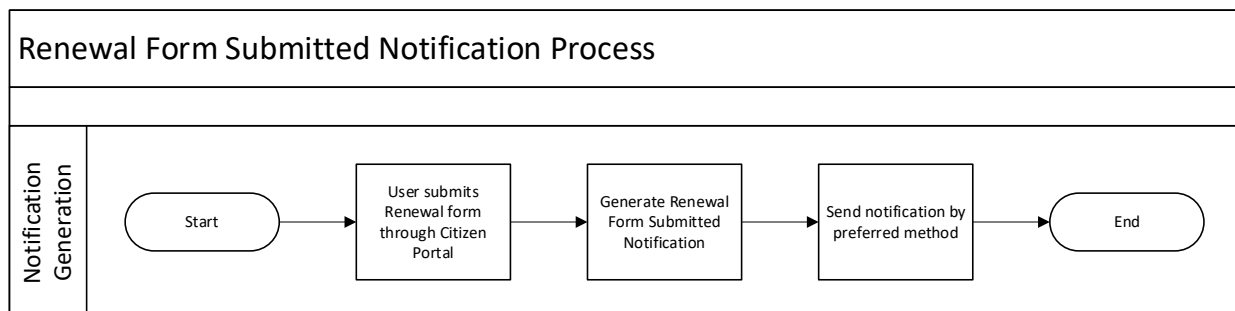
N/A

8.8 (Online COC) Renewal Form Submitted Notification (New)

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

8.8.1 Generation Details

Figure 171: Renewal Form Submitted Notification



8.8.2 Layout

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

8.8.3 Expected Values

N/A

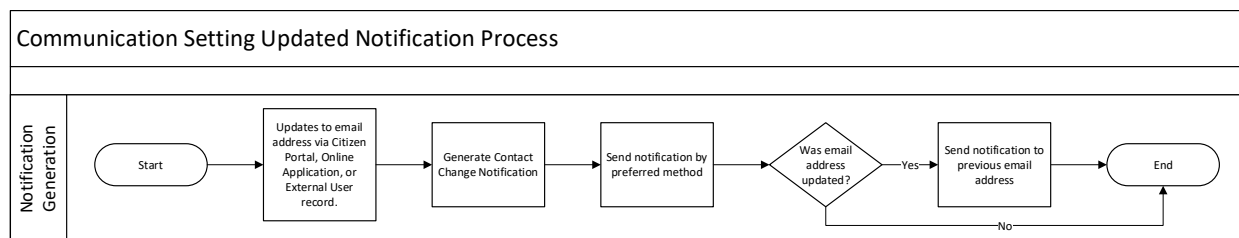


8.9 (Online COC) Communication Setting Updated Notification (New)

The Communication Setting Updated Notification is a communication that will be sent to each person when **<PRMO-224> Communication Settings contact information (email address or phone number)** has been changed for an account on the Citizen Portal. This notice will be sent to both the original and the new **email address. or phone number.**

8.9.1 Generation Details

Figure 172: Communication Setting Updated Notification <PRMO-224> <CR189>



8.9.2 Layout

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



8.9.3 Expected Values

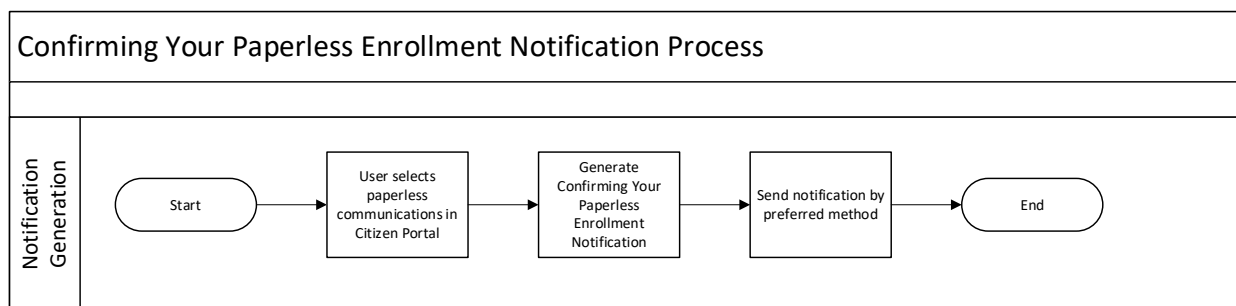
| # | Value | Attribute | Comments |
|---|----------------------|--|--|
| 1 | <contactDescription> | Contact Description options:
"email address"
<PRMO-224>
"cellphone number"
"contact language" | If multiple changes were updated in one setting, then consolidate the message to one notification. |
| 2 | <contactInformation> | The new email address
<PRMO-224> phone number , and/or contact language entered on the Your Settings page. | |

8.10 (Online COC) Confirming Your Paperless Enrollment Notification (New)

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

8.10.1 Generation Details

Figure 173: Confirming Your Paperless Enrollment Notification





8.10.2 Layout

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

8.10.3 Expected Values

N/A

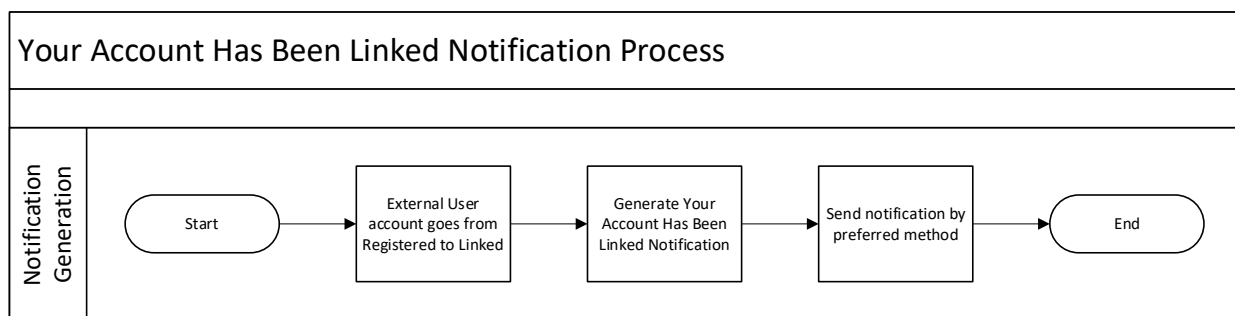


8.11 (Online COC) Your Account Has Been Linked Notification (New)

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

8.11.1 Generation Details

Figure 174: Your Account Has Been Linked Notification





8.11.2 Layout

| | | |
|------------------|----------|---|
| English Verbiage | Subject: | Your Account Has Been Linked |
| | Body: | <p>We were able to link your account. Now you will be able to:</p> <ul style="list-style-type: none"> - View the status of your coverage - Renew you benefits - Report changes - Upload supporting documents - View notices - View upcoming appointments <p>To view your information, please log in to PSPMPR at https://solicitamedicaid.salud.gov.pr/.</p> |
| Spanish Verbiage | Subject: | Su Cuenta Ha Sido Vinculada |
| | Body: | <p>Hemos podido vincular su cuenta. Ahora usted será capaz de:</p> <ul style="list-style-type: none"> - Ver el estado de su cubierta - Recertificar sus beneficios - Notificar cambios - Cargar documentos de soporte - Ver avisos - Ver próximas citas <p>Para ver su información, inicie una sesión en PSPMPR en https://solicitamedicaid.salud.gov.pr/.</p> |

8.11.3 Expected Values

N/A

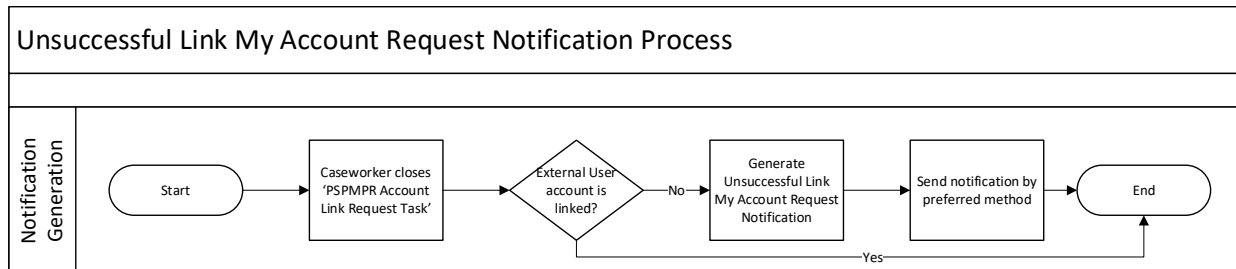
8.12 (Online COC) Unsuccessful Link My Account Request (New)

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



8.12.1 Generation Details

Figure 175: Unsuccessful Link My Account Request Notification



8.12.2 Layout

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

8.12.3 Expected Values

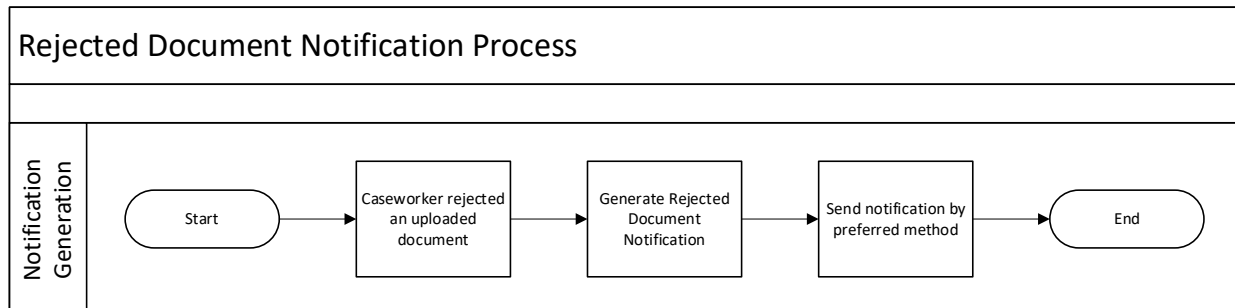
N/A

8.13 (Online COC) Rejected Document Notification (New)

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

8.13.1 Generation Details

Figure 176: Rejected Document Notification



8.13.2 Layout

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

8.13.3 Expected Values

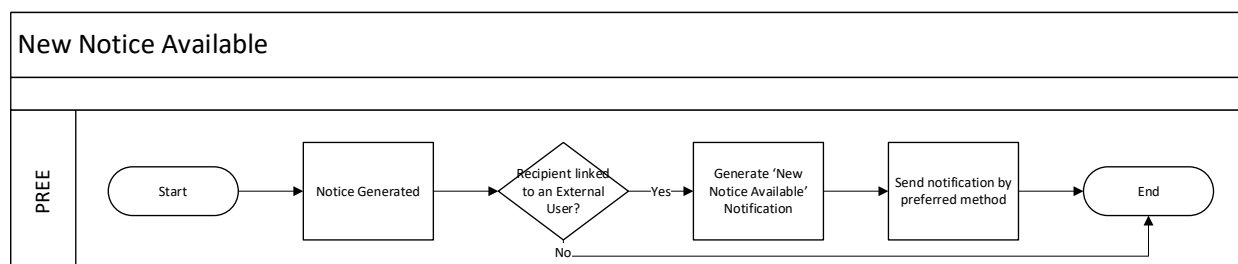
N/A

8.14 (Online COC) New Notice Available Notification (Modify)

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

8.14.1 Generation Details

Figure 177: New Notice Available Notification





8.14.2 Layout

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

8.14.3 Expected Values

N/A

8.15 <PRMO-224>Temporary Passcode Notification (New)

The Temporary Password Notification is a notification that will be sent when the user clicks on the link within the Password Reset Request.

8.15.1 Generation Details

When "Click here" is clicked from the Password Reset Request notification within 5 mins.



8.15.2 Layout

| | | |
|------------------|----------|--|
| English Verbiage | Subject: | PSPMPR |
| | Body: | Use the following passcode to access your Puerto Rico Medicaid Program Services Portal (PSPMPR) account. This code will only be valid for 5 minutes.
Your passcode is:

Passcode: <temporary passcode > |
| Spanish Verbiage | Subject: | PSPMPR |
| | Body: | Use el siguiente código de acceso para acceder a su cuenta del Portal de Servicios Programa Medicaid de Puerto Rico (PSPMPR). Este código de acceso será válido solo durante 5 minutos.

Su código de acceso es: <temporary passcode > |

8.15.3 Expected Values

| # | Value | Attribute | Comments |
|---|----------------------|---|----------|
| 1 | <temporary passcode> | System generated and will be valid for 5 minutes. | |

9 Development Considerations

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

9.1 Date Format

For the Citizen Portal, the date will always be in the DDMMYYYY format, regardless of the selected language. If possible, also include calendar menu to select a date from, as in the Caseworker Portal.

9.2 Idle Time

Set idle time to 15 minutes and display the warning countdown when idle for 10 minutes. After 15 minutes of inactivity, the user will be logged out.



9.3 Manual Linking

10 Training Considerations

10.1 Non-primary member submits an application

When a non-primary member submits an application as the primary applicant, the caseworker will have the ability to associate that application to another integrated case (IC) that the person is a member of. When the transfer is completed, the application will contain the evidence from the transferred IC and from the application.

10.2 Managing Duplicate Evidences

When a primary member has an existing IC and submits an application online, then the evidence that will be considered by the rules will be all the active evidence from the IC and the evidence created from the online application. Caseworkers will need to be mindful of duplicate and/or outdated evidence.

10.3 Linking a Person to an External User

A citizen with a user account in the Citizen Portal is referred as an External User. A citizen registered in PREE is referred as a Person. A citizen can exist as both an External User and as a Person.

When an External User has successfully completed RIDP and submits an online application, it will go through the Person Match process. The Person identified as the Primary Applicant will be systematically linked to the External User.

If the External User was unsuccessful with RIDP, the person must complete IDP per PRMP policy. When the External User completes IDP per PRMP policy, the caseworker will link the Person in PREE to the External User. This will give the External User full access to the Citizen Portal.

10.4 <CR-132> Submitted Documents

Documents that are uploaded from the Citizen Portal will display on the Uploaded Documents tab within Verification ~~Attachments~~ page of the application.

10.5 (Online COC) Manual PSPMPR Account Linking Process

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

- Check if the Person is an active member on a single IC. Persons active on multiple cases will not have access to prepopulated forms. Therefore, the



caseworker needs to identify which case is the correct case and end date the Household Member evidence on the other case(s).

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

11 Reporting Considerations

This section is not applicable for Citizen Portal FDD.

12 Use Cases and Scenarios

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

12.1 Use Case 1: Creating an Account on the Citizen Portal

12.1.1 Description

Citizen wants to create an account on the Citizen Portal.

12.1.2 Actors

Citizens

12.1.3 Pre-Conditions

Citizen has a valid email address.

12.1.4 Post-Conditions

The user has a username and password he/she can use to log into their account on the Citizen Portal.

12.1.5 Main Scenario

1. User opens the Citizen Portal home page
2. User clicks 'Sign Up' in the home page header to display the 'Sign up' page
3. User completes required fields, including email address, username and password
4. User clicks the 'terms and conditions' link and reviews the page
5. User selects the 'I agree to the terms and conditions' checkbox
6. User clicks 'Sign Up' button
7. The Dashboard for a logged-in user is displayed



8. End Use Case

12.1.6 Extensions

12.1.6.1 Extension 1 (After Main Scenario, Step 6)

This extension happens when the user enters an email address which is already registered in the system.

1. The Citizen Portal displays the message "'<entered email>' is already registered."
2. User modifies email address
3. Return to step 6 in Main Scenario

12.1.6.2 Extension 2 (After Main Scenario, Step 6)

This extension happens when the user enters a username which is already registered in the system.

1. The Citizen Portal displays the message "'<entered username>' is already taken. Please enter another username."
2. User modifies username
3. Return to step 6 in Main Scenario

12.1.6.3 Extension 3 (After Main Scenario, Step 6)

This extension happens when the user enters a password which is not valid.

1. The Citizen Portal displays message "The password entered is invalid. Password must be at least 8 characters; at least one numeric and at least one special character; a mixture of at least one uppercase and at least one lowercase letter."
2. User modifies password to conform to rules in the message
3. Return to step 6 in Main Scenario

12.1.7 Frequency

Once, per citizen.

12.1.8 Special Requirements

12.1.8.1 Performance

No special performance requirements.

12.1.8.2 Security

User must know their username, password, and answer to their security question prior to logging into their account.

12.1.8.3 Usability / Accessibility

No special usability requirements.



12.1.8.4 Other

No other requirements.

12.2 Use Case 2: Log in to an Account on the Citizen Portal

12.2.1 Description

Citizen wants to log into their account on the Citizen Portal.

12.2.2 Actors

Citizens

12.2.3 Pre-Conditions

Citizen has an account on the Citizen Portal, and is not already logged in.

12.2.4 Post-Conditions

The user is logged into their account on the Citizen Portal.

12.2.5 Main Scenario

1. User opens the Citizen Portal home page
2. User clicks 'Log in' in the home page header to display the 'Log in' page
3. User enters username and password
4. User clicks 'Log in' button
5. User answers security question
6. User clicks 'Next' button
7. The Dashboard for a logged-in user is displayed
8. End Use Case

12.2.6 Extensions

12.2.6.1 Extension 1 (After Main Scenario, Step 2)

This extension happens when the user wishes to retrieve their username.

1. User clicks the 'Forgot username?' link
2. User enters their email address
3. User clicks the 'Submit' button
4. User receives email which includes their Citizen Portal username
5. Return to Step 3 in Main Scenario

12.2.6.2 Extension 2 (After Main Scenario, Step 2)

This extension happens when the user wishes to retrieve their password.



1. User clicks the 'Forgot password?' link
2. The 'Forgot your password' page is displayed
3. User enters their username
4. User clicks the 'Next' button
5. The 'Reset your password' page is displayed
6. User enters the answer to a security question
7. User enters a new password
8. User clicks the Submit button
9. Return to Step 3 in Main Scenario

12.2.7 Frequency

As needed, per citizen.

12.2.8 Special Requirements

12.2.8.1 Performance

No special performance requirements.

12.2.8.2 Security

User must know their username, password, and answer to their security question prior to logging into their account.

12.2.8.3 Usability / Accessibility

No special usability requirements.

12.2.8.4 Other

No other requirements.

12.3 (Online COC) Use Case 3: Complete a blank online application

12.3.1 Description

Citizen wants to submit an application.

12.3.2 Actors

Citizens

12.3.3 Pre-Conditions

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

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



12.3.4 Post-Conditions

The user has submitted an application.

12.3.5 Main Scenario

10. User opens the Citizen Portal home page
11. User clicks 'Login' in the home page header to display the 'Login' page
12. User completes required fields, including username and password
13. User clicks 'Login' button
14. The Dashboard for a logged-in user is displayed
15. User clicks on Apply for benefits link
16. Apply for benefits page is displayed
17. User clicks next
18. Include benefits page is displayed
19. User can select to apply for retroactive coverage and clicks next
20. Application overview page is displayed
21. User reviews the information on the page and clicks 'Start application' to begin an application
22. The 'Information about you' page is displayed
23. User proceeds to complete the application pages
24. Once the application is signed and submitted the 'Application Submitted' page is displayed
25. End Use Case

12.3.6 Extensions

No extension identified.

12.3.7 Frequency

Multiple times.

12.3.8 Special Requirements

12.3.8.1 Performance

No special performance requirements.

12.3.8.2 Security

No special security requirements.

12.3.8.3 Usability / Accessibility

No special usability requirements.



12.3.8.4 Other

No other requirements.

12.4 (Online COC) Use Case 4: Complete a prepopulated online application

12.4.1 Description

Citizen wants to submit an application.

12.4.2 Actors

Citizens

12.4.3 Pre-Conditions

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

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

12.4.4 Post-Conditions

The user has submitted an application.

12.4.5 Main Scenario

26. User opens the Citizen Portal home page
27. User clicks 'Login' in the home page header to display the 'Login' page
28. User completes required fields, including username and password
29. User clicks 'Login' button
30. The Dashboard for a logged-in user is displayed
31. User clicks on Apply for benefits link
32. Apply for benefits page is displayed
33. User clicks next
34. Application overview page is displayed
35. User reviews the information on the page and clicks 'Start application' to begin an application
36. User is prompted to review current address and make changes as needed
37. Next, user is prompted to review household members and remove members as needed.



38. Next, user is prompted to review their personal information summary page and make changes as needed
39. Next, user is prompted to review the home member information summary page and make changes as needed
40. Next, user is prompted to review the general information summary page and make changes as needed
41. Next, user is prompted to review the summary of your income page and make changes as needed
42. Next, user is prompted to review the summary of your expenses page and make changes as needed
43. Next, user is prompted to review the summary of your resources page and make changes as needed
44. Next, user is prompted to review the health insurance summary page and make changes as needed
45. Finally, user is prompted to review the disclosure and agrees to the terms and conditions on the Electronic Signature page
46. User submits the application and the confirmation page is displayed
47. End Use Case

12.4.6 Extensions

No extension identified.

12.4.7 Frequency

Annual or less often.

12.4.8 Special Requirements

12.4.8.1 Performance

No special performance requirements.

12.4.8.2 Security

User must have completed ID Proofing.

12.4.8.3 Usability / Accessibility

No special usability requirements.

12.4.8.4 Other

No other requirements.



12.5 (Online COC) Use Case 5: Submit a Renewal Form

12.5.1 Description

Citizen wants to submit a renewal form.

12.5.2 Actors

Citizens

12.5.3 Pre-Conditions

Citizen has a linked account.

Citizen is a primary client on an active case.

A household member is in their recert period.

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

12.5.4 Post-Conditions

The user has submitted a renewal form.

12.5.5 Main Scenario

1. User opens the Citizen Portal home page
2. User clicks 'Login' in the home page header to display the 'Login' page
3. User completes required fields, including username and password
4. User clicks 'Login' button
5. The Dashboard for a logged-in user is displayed
6. User clicks on Your benefits
7. User clicks Start button within the Online Renew card
8. Renewal Overview page is displayed
9. User reviews the information on the page and clicks 'Next' to begin a renewal
10. User completes steps 11 – 20 of [\(Online COC\) Use Case 4: Complete a prepopulated online application](#)
11. Once the renewal is signed and submitted the 'Renewal Submitted' page is displayed
12. End Use Case

12.5.6 Extensions

No extension identified.

12.5.7 Frequency

Annually for each certification period in a household.



12.5.8 Special Requirements

12.5.8.1 Performance

No special performance requirements.

12.5.8.2 Security

User must had completed ID Proof

12.5.8.3 Usability / Accessibility

No special usability requirements.

12.5.8.4 Other

No other requirements.

12.6 (Online COC) Use Case 6: Submit a Change on the Citizen Portal

12.6.1 Description

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

12.6.2 Actors

Citizens

12.6.3 Pre-Conditions

Citizen has a linked account.

12.6.4 Post-Conditions

The user has an email confirming the change was reported.

12.6.5 Main Scenario

13. User opens the Citizen Portal home page
14. User clicks 'Login' in the home page header to display the 'Login' page
15. User completes required fields, including username and password
16. User clicks the 'Login' button
17. The Dashboard for a logged-in user is displayed
18. User clicks 'Profile' tab
19. Your Profile screen is displayed
20. User clicks on Change of Circumstance card
21. User reviews the Change of Circumstance overview page and clicks on next
22. User select the type of changes to report against



23. The summary page for the first change type is displayed. User can make the necessary updates then proceed to the next summary page until all the summary pages for each of the selected change types have been displayed and reviewed.
24. The user reads the disclosure and agrees to the terms and conditions on the Electronic Signature page
25. The user clicks on next and the Confirmation page is displayed
26. End use case

12.6.6 Extensions

12.6.6.1 Extension 1 (After Main Scenario, Step 10)

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

27. The Citizen Portal displays the message "<Please select at least one type of information to change.>"
28. User selects at least one change type
29. Return to step 11 in Main Scenario

12.6.6.2 Extension 2 (After Main Scenario, Step 7)

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

30. User clicks on Change Address card
31. Address overview page is displayed
32. User navigates through the address change pages and reports address(es) change
33. Address Change summary page is displayed
34. Return to step 12 in Main Scenario

12.6.6.3 Extension 3 (After Main Scenario, Step 7)

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

35. User clicks on Add/Remove Household Member
36. Add and Remove household member overview page is displayed
37. User removes a household member by entering all relevant details
38. User answers Yes to add another household member and clicks on next
39. User reviews the Removed Household Member Summary page and clicks on next
40. User is navigated to the online application to enter information pertaining to the new member from the Home Member Page to Health Insurance Summary page.



41. Return to step 12 in Main Scenario

12.6.6.4 Extension 4 (After Main Scenario, Step 7)

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

- 42. User clicks on Change Income card
- 43. Summary of your income is displayed
- 44. User enters the income changes
- 45. Return to step 12 in Main Scenario

12.6.7 Frequency

Multiple times.

12.6.8 Special Requirements

12.6.8.1 Performance

No special performance requirements.

12.6.8.2 Security

User must have completed ID Proofing.

12.6.8.3 Usability / Accessibility

No special usability requirements.

12.6.8.4 Other

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

12.7 Scenarios

12.7.1 Citizen Portal Account Scenarios

Table 13: Citizen Portal Account

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|------------------|--|---|-----------------------------|
| CITIZEN-ACCT-001 | To validate that changes have been made, per the design document, to the <Citizen Portal> Home Page including the Header, Footer, and the links on the Footer. | Access <Citizen Portal> website and validate the changes. | All changes have been made. |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|------------------|---|--|---|
| CITIZEN-ACCT-002 | <p>To validate that changes have been made, per the design document, on the Sign Up Page.</p> <p>To validate the validation messages when signing up.</p> <p>To validate that the Terms and Conditions have been made per the design document</p> <p>To validate that a new account can be created.</p> <p>To validate the RIDP process when identify results when unsuccessful.</p> <p>46.To validate the Sign Up Email that is sent to the new account holder</p> | <p>Access the Sign Up page from the <Citizen Portal> Home Page and validate the changes to screen, messages, account creation and email.</p> | <p>All changes have been made. Account is created and RIDP results are unsuccessful. Sign Up Email is sent to new account holder.</p> |
| CITIZEN-ACCT-003 | <ol style="list-style-type: none"> To successfully Log In to <Citizen Portal> To verify that when logged in 'Log Out' displays in the <Citizen Portal> header | <p>Access the Log In page from the <Citizen Portal> and sign into user account.</p> <p>Precondition:
CITIZEN-ACCT-002</p> | <p>Successfully sign into user account and 'Log Out' displays.</p> |
| CITIZEN-ACCT-004 | <p>Trigger Validation Message after 5th invalid entry of password</p> | <p>Access the Log In page from the <Citizen Portal> and enter incorrect password 5 times.</p> <p>Precondition:
CITIZEN-ACCT-002</p> | <p>Validation Message displays after 5th invalid entry of password.</p> |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|------------------|---|---|---|
| CITIZEN-ACCT-005 | To validate the new page displays, per the design document, when user wants to retrieve a username.

To validate the Retrieve Username email is sent. | Access the Log In page from the <Citizen Portal> and click <i>Retrieve Username</i> .

Precondition: CITIZEN-ACCT-002 | The new Retrieve Username page displays correctly, and the email is sent. |
| CITIZEN-ACCT-006 | To validate the new page displays, per the design document, when a password is forgotten. | Access the Log In page from the <Citizen Portal> and click <i>Forgot Your Password</i> .

Precondition: CITIZEN-ACCT-002 | The new Forgot Your Password page displays correctly. |
| CITIZEN-ACCT-007 | To validate the new page displays, per the design document, when a password is reset.

To validate the Your Password Change email is sent. | Access the Log In page from the <Citizen Portal> and click 'Forgot your Password'. Click 'Reset your Password'.

Precondition: CITIZEN-ACCT-002 | The new Reset Your Password page displays correctly, and the Reset Your Password email is sent. |
| CITIZEN-ACCT-008 | To validate that changes have been made, per the design documents, for the account header and dashboard on the Account home page | Log In to the <Citizen Portal>.

Precondition: CITIZEN-ACCT-002 | All changes have been made. |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|------------------|---|--|---|
| CITIZEN-ACCT-009 | To validate that changes have been made, per the design documents, for the <Citizen Portal> account Your Benefit page. | Log In to the <Citizen Portal> and view Your Benefit Page.

Precondition: CITIZEN-ACCT-002 | All changes have been made. |
| CITIZEN-ACCT-010 | To validate the new Upload Documents page displays, per the design document for the <Citizen Portal> account when user wants to submit documents. | After an application has been submitted for an applicant with an account access the Upload Documents page from the Your Benefit Page.

Precondition: CITIZEN-ACCT-002, CITIZEN-IEG-002 | The new Upload Document page displays correctly. |
| CITIZEN-ACCT-011 | To validate the new Add Documents page displays, per the design document for the <Citizen Portal> account, when user wants to upload documents after application is submitted

To validate that multiple documents can be uploaded. | After an application is submitted click the Upload Document link. Verify the Add Document page and upload documents. | The Add Document page displays correctly. The documents are uploaded. |
| CITIZEN-ACCT-012 | To verify that the FAQs display per the design document | On the <Citizen Portal> Home Page click 'FAQs. Verify the FAQs. | The FAQs display per the design document. |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.I.ii Completed Medicaid Application - Citizen Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|------------------------|--|---|---|
| CITIZEN-ACCT-013 | To validate that the <Citizen Portal> shall be accessible via mobile device. | View the <Citizen Portal> on assorted mobile devices with different operating systems, e.g., Android, IOS, Microsoft. | <Citizen Portal> renders correctly regardless of the size of the mobile device. |



12.7.2 Citizen Portal Intelligence Evidence Gathering (IEG) Scenarios

Table 14: Citizen Portal IEG

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|-----------------|---|---|--|
| CITIZEN-IEG-001 | <p>To validate that changes have been made, per the design documents, to the following pages:</p> <p>Apply for Benefits, Overview, Information About You, Applicant Details, Review your Answers, Home Member Details, Home Relationship, <PRMO-445> Absent Parent Information, Absent Parent Details, General Information, Blind Details, Pregnant Details, Review your Answers, Benefit Information, Current Benefit Information, Review your Benefit Details, Income Information, Employment, Trust Income, Summary Information, Resource General Information, Vehicle, Property, Summary of Your Resources, Expenses Information, Full Summary, Electronic Signature, Submission Summary, Application Submitted</p> <p>The Upload Document link does not display on the Application Summary page.</p> <p>To validate that all evidence is mapped correctly.</p> | <p>Applicants: Pregnant Mother (32 years old), Child (7 years old), <PRMO-445> Absent Parent, Blind grandmother (67 years old).</p> <p>Benefits:</p> <p>Grandmother has current Medicare Benefits</p> <p>Income:</p> <p>Pregnant Mother (EI=Wages & Salaries, monthly, \$700)</p> <p>Grandmother (TI = Trust Income, monthly, \$500)</p> <p>Resources:</p> <p>Pregnant Mother has a Vehicle</p> <p>Pregnant Mother owns her home</p> <p>Pregnant Mother has Other Resources</p> | <p>All changes to the IEG pages have been made, the upload document link does not display on the Application Summary page, and all evidence is mapped correctly.</p> |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| | | | |
|------------------------|--|---|--|
| <p>CITIZEN-IEG-002</p> | <p>To validate that changes have been made, per the design documents, to the following pages: Disabled Details, Self-Employment, Other Income, Annuity Income, Child Support Expenses, Dependent Care Expenses, Summary of Your Expenses.</p> <p>To validate that Applicant can access an online application from the account holder's dashboard.</p> <p>To validate the modified RIDP Identity Results when unsuccessful</p> <p>To validate that changes have been made, per the design documents, for the <Citizen Portal> account Your Benefit page for an application is In Progress.</p> <p>To validate that Online Application Task is created and allocated to the appropriate Regional queue.</p> <p>To validate that Online Application Task Upload Document comment is added after documents are uploaded.</p> <p>To validate that the documents are displayed on the Attachments page on the Person</p> <p>To validate that all evidence is mapped correctly.</p> <p>To validate that when application is submitted the Primary Applicant is created as a Prospect Person on PREE</p> | <p>Applicants:</p> <p>Father (30 years old), Mother (29 years old), Child (8 years old), Disabled Grandfather (66 years old)</p> <p>Income:</p> <p>Father (Self Employed, Sales, Monthly, \$700)</p> <p>Mother (Other Income, Monthly, \$200)</p> <p>Grandfather (AI=Annuity Income, monthly, \$500)</p> <p>Expenses:</p> <p>Father, Child Support Expenses, monthly, \$200</p> <p>Father, Dependent Care Expenses, monthly, \$150</p> <p>Preconditions:</p> <p>User has an account on the <Citizen Portal>, CITIZEN-ACCT-002 (predecessor)</p> | <p>All changes to the IEG pages have been made, the upload document link does display on the Application Summary page, the Online Application Task Upload, the Online Application Task is created and updated, and all evidence is mapped correctly.</p> |
|------------------------|--|---|--|



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|-----------------|---|--|---|
| CITIZEN-IEG-003 | <p>To validate that changes have been made, per the design documents, to the following pages: Former Foster Care</p> <p>Able to capture all the required information needed for a former foster care recipient and verify that the Former Foster Care Evidence is mapped correctly.</p> <p>Online Application Task is created and allocated to the Central Office Work Queue. The Sensitive Applicant snippet displays.</p> | <p>Applicants - Applicant (22 years old).</p> <p>Living Arrangement: Forensic Psychiatry, temporary</p> <p>Income - \$0</p> <p>ADFAN on 21st birthday - Yes</p> <p>State - Puerto Rico</p> <p>Enrolled on Medicaid on 21st birthday</p> <p>Preconditions:
 User has an account on the <Citizen Portal>, CITIZEN-ACCT-002 (predecessor)</p> | <p>All changes to the IEG pages have been made, the Online Application Task is allocated to the Central Office Work Queue and includes the Sensitive Applicant snippet, and all evidence is mapped correctly.</p> |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|-----------------|---|---|---|
| CITIZEN-IEG-004 | <p>To validate that changes have been made, per the design documents, to the following pages: Foster Care Details</p> <p>Able to capture all the required information needed for an Auto Eligibility - Foster Care Title IV-E evaluation and verify that the Foster Care Evidence is mapped correctly.</p> <p>Online Application Task is created and allocated to the Central Office Work Queue. The Sensitive Applicant snippet displays.</p> <p>To validate that an application can be withdrawn after it is submitted.</p> | <p>Living Arrangement: Foster Care</p> <p>Status of Living Arrangement: Permanent</p> <p>Applicants -Child 1 (5 years old).</p> <p>Foster Care Start Date: Title IV-E.</p> <p>Foster Care State: Puerto Rico</p> <p>Foster Care Notification Type: Title IV-E</p> | <p>All changes to the IEG pages have been made, the Online Application Task is allocated to the Central Office Work Queue and includes the Sensitive Applicant snippet, and all evidence is mapped correctly.</p> |
| CITIZEN-IEG-005 | <p>To validate that changes have been made, per the design documents, to the following pages Adoption Details</p> <p>Able to capture all the required information needed for an Auto Eligibility - Adoption Title IV-E evaluation and verify that the Adoption Evidence is mapped correctly.</p> | <p>Applicants - Mother, Child 1 (5 years old).</p> <p>Income - Mother (EI=Tips and Commission, monthly, \$400).</p> <p>Adoption Agreement Type: Title IV-E</p> <p>Date of Adoption Agreement: 1 month ago</p> | <p>All changes to the IEG pages have been made and Adoption evidence has been mapped correctly.</p> |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|-----------------|---|---|--|
| CITIZEN-IEG-006 | <p>To validate that changes have been made, per the design documents, to the following pages: More About You</p> <p>Online Application Task is created and allocated to the Central Office Work Queue.</p> <p>Sensitive Snippet displays on task.</p> | <p>Applicants - Grandmother (66 years old / not an applicant), Mother (25 years old), Child (5 years old)</p> <p>No Income</p> <p>Living Arrangement - OPM and living arrangement is temporary</p> <p>Residency of PR - permanent</p> | <p>All changes to the IEG pages have been made and the Online Application Task is created and allocated to the Central Office Work Queue and includes the Sensitive Snippet.</p> |
| CITIZEN-IEG-007 | <p>To validate that changes have been made, per the design documents, to the <i>Exit</i> page when user's ID has been verified.</p> <p>To validate that the application shows as <i>In Progress</i> on the Application Card of Your Benefits.</p> <p>To validate that the application can be resumed.</p> | <p>An applicant applies for benefits and exits the application after completing the General Information page.</p> <p>Precondition: Applicant's account has been verified</p> | <p>All changes to the IEG pages have been made. Application card displays <i>In Progress</i>. The application is saved and resumed.</p> |
| CITIZEN-IEG-008 | <p>To validate that changes have been made, per the design documents, to the <i>Exit</i> page when user's ID has not been verified.</p> <p>To validate the Delete application process.</p> | <p>An applicant applies for benefits and exits the application after completing the General Information page.</p> | <p>All changes to the IEG pages have been made. Application card displays <i>In Progress</i>.</p> <p>Delete prompt displays after application is deleted.</p> |



12.7.3 Citizen Portal Homepage Scenarios

Table 15: Citizen Portal – Homepage

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|-----------------|---|---|---|
| ONLCOC-HP-001 | To validate that changes have been made, per the design document, on the Sign Up Page. | Access the Sign Up page from the Citizen Portal Home Page and validate the changes to screen. | All changes have been made. |
| ONLCOC-HP-002 | To successfully Log In to Citizen Portal with the username and temporary password provided by caseworker.

Promoted to set password on the 'Set your password' page, per the design document. | Access the Log In page from the Citizen Portal and sign into user account.

Set Password page appears. Enter a new password, press Submit. Login again with the new password. | Successfully sign into user account and 'Log Out' displays. |
| ONLCOC-HP-003 | To validate that changes have been made, per the design document, to the Citizen Portal Footer. | Access Citizen Portal via the SIT URL and validate the changes. | All changes have been made. |

12.7.4 Citizen Portal Your Account Scenarios

Table 16: Citizen Portal – Your Account

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



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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

12.7.5 (Online COC) Citizen Portal Application Scenarios

Table 17: Citizen Portal – Application

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



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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

12.7.6 (Online COC) Citizen Portal COC Scenarios

Table 18: Citizen Portal – Change of Circumstance

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



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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

12.7.7 (Online COC) Citizen Portal Renewal Scenarios

Table 19: Citizen Portal – Renewal

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



12.7.8 (Online COC) Caseworker Portal Scenarios

Table 20: Caseworker Portal

| Scenario number | Scenario Explanation | Scenario Description | Expected Outcome |
|-----------------|--|---|-----------------------------|
| ONLCOC-CWP-001 | To validate that changes have been made, per the design document, on the Caseworker Portal Person menu and the New Account page. | Access the main menu for a Person in the Caseworker Portal, for a person without a Citizen Portal account. Select "New PSPMPR Account". | All changes have been made. |
| ONLCOC-CWP-002 | To validate that changes have been made, per the design document, on the Caseworker Portal Person menu and the Disable Account page. | Access the main menu for a Person in the Caseworker Portal, for a person with an enabled Citizen Portal account. Select "Disable PSPMPR Account". | All changes have been made. |
| ONLCOC-CWP-003 | To validate that changes have been made, per the design document, on the Caseworker Portal Person menu and the Enable Account page. | Access the main menu for a Person in the Caseworker Portal, for a person with a disabled Citizen Portal account. Select "Enable PSPMPR Account". | All changes have been made. |
| ONLCOC-CWP-004 | To validate that changes have been made, per the design document, on the Caseworker Portal External User page. | Open an External User in Caseworker Portal. Select the "Attachments" tab. | All changes have been made. |

13 Related Documents

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



Table 21: Related Documents

| Document Name |
|---|
| CitizenPortal-Application.xlsx |
| CitizenPortal-Caseworker.xlsx |
| CitizenPortal-Code Table Translation.xlsx |
| CitizenPortal-HomeSignupLoginYourAccount.xlsx |
| FAQ-English.docx |
| FAQ-Spanish.docx |
| HIPAA-English.docx |
| HIPAA-Spanish.docx |
| PHI-English.docx |
| PHI-Spanish.docx |
| PREE Code Tables Document |
| Terms and Conditions-English&Spanish.docx |
| |



14 Requirements Matrix

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

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



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

Table 22: Requirement Matrix

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|--|--------------------------------------|
| FR-GEN-003 | The Solution shall provide a citizen interface in Spanish and English for the Citizen Self Service Portal. | Fit | The Citizen Portal includes a language selection which allows Spanish (default) or English to be selected as the user interface language. | OOTB - Pending Approval |
| FR-INT-014 | The Solution shall provide online help functionality for the Citizen portal. | Fit | The Citizen Portal will provide on-screen instructions as well as help icons which will display additional information to the user, where appropriate. | OOTB - Pending Approval |
| FR-INT-016 | The Solution shall have the ability to capture application/case information through the online Citizen portal, Partner portal and Worker portal. | Gap | The Citizen Portal will provide application capability in this release. | N/A |
| FR-INT-018 | The Solution shall have the ability to prohibit the use of special characters, as defined by Puerto Rico. | Fit | The Citizen Portal will validate fields where needed to ensure only valid characters are entered. | OOTB - Pending Approval |
| FR-INT-019 | The Solution shall allow Applicant/member to view application & renewal status, coverage, and notices through an online channel. | Gap | The Citizen Portal will display application status in this release. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|--|--------------------------------------|
| FR-INT-020 | The Solution shall allow Applicant/member ability to submit/update application or report changes through an online channel. | Gap | The Citizen Portal will permit applicants to submit applications and upload related documents in this release. | N/A |
| FR-INT-021 | The Solution shall have the ability to display Puerto Rico -specific content that informs the consumer/Applicant regarding the confidentiality of their data. | Fit | The Citizen Portal will display a page prior to application submission which includes and requires the applicant to confirm they have read the Puerto Rico Medicaid Program's Management and Protection of Personal Health Information Policy. | N/A |
| FR-INT-023 | The Solution shall have the ability to notify the Applicant/member if an account does not exist. | Fit | When creating an account, a unique email address is required. If user enters an email address associated to an account, an error message will be displayed. | OOTB - Pending Approval |
| FR-INT-029 | The Solution shall have the ability to activate citizen account, provide account confirmation and send notification to the citizen based on citizen preferences. | Gap | In this release the Citizen Portal will allow users to create accounts and confirm account creation. | N/A |
| FR-INT-030 | The Solution shall have the ability for the Applicant to provide login information. | Fit | Users will provide username and password during account creation. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|--|--------------------------------------|
| FR-INT-031 | The Solution shall have the ability for the Applicant to retrieve or reset citizen id/password. | Fit | The Citizen Portal will include 'Retrieve username' and 'Forgot your password/Reset password' features. | N/A |
| FR-INT-033 | The Solution shall have the ability to restrict the Applicant from logging in after reaching maximum configurable number of invalid login attempts. | Fit | A user will be limited to 5 unsuccessful login attempts after which their account will be locked, and a password reset required. This number will be configurable. | N/A |
| FR-INT-036 | The Solution shall allow an online Applicant/member to retrieve an application that was saved for additional data collection prior to submission or re-saving. | Fit | The Citizen Portal allows for logged in users to save and retrieve applications. | OOTB - Pending Approval |
| FR-INT-037 | The Solution shall allow an online Applicant/member to navigate to sections previously completed without losing data on a partially completed page. | Fit | As long as the mandatory questions are answered, applicant can leave the partially completed pages and navigate to a previous page without losing the information entered. | OOTB - Pending Approval |
| FR-INT-039 | The Solution shall allow member/Applicants to attach documents (including but not limited to verification proof documents) to a case/individual. | Gap | Once an application is submitted from the portal by a logged in user, the user can upload documents and specify the type of each document for this release. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|---|---------|---|--------------------------------------|
| FR-INT-045 | The Solution shall allow member/Applicants to add, remove, or change document type descriptions. | Fit | During the upload process the applicant can add and remove document type and enter a description. User will be able to add and remove | N/A |
| FR-INT-047 | The Solution shall allow member/Applicants to review, update, or print an application. | Fit | Member/Applicants can review and update an application until it has been signed and submitted. When complete, an application PDF can be generated by the user for printing. | N/A |
| FR-INT-048 | The Solution shall allow member/Applicants to withdraw an application before and after submission. | Fit | The Citizen Portal allows saved applications to be deleted prior to submission, and once submitted an application can be withdrawn. | N/A |
| FR-INT-050 | The Solution shall allow online Applicant/members to enter income, resource, and other asset data consistent with program policy. | Fit | Applicant/members will be able to provide all information necessary to build a complete application for medical benefits in the Citizen Portal. | N/A |
| FR-INT-052 | The Solution shall allow an online Applicant/member to save an application without submitting it. | Fit | Logged-in users can save in-progress applications and later resume or delete them. | OOTB - Pending Approval |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|---|---------|---|--------------------------------------|
| FR-INT-053 | The Solution shall have the ability to capture a digital signature. | Fit | The application script in the Citizen Portal includes a signature page which is required in order to submit the application. | OOTB - Pending Approval |
| FR-INT-055 | The Solution shall provide field level help for each online application data element that includes description and required format in the form of pop-up/hover. | Fit | The application provides help via help icons which will display additional information to the user, where appropriate. Both field and cluster help text are provided for fields which require explanation beyond that provided by instruction text on the page. | N/A |
| FR-INT-063 | The Solution shall allow Applicant/member ability to submit/update application through an online channel. | Fit | The Citizen Portal includes application submission and permits edit/update of applications which have not yet been submitted. | OOTB - Pending Approval |
| FR-INT-068 | The Solution shall have the ability to alert the member/Applicant when incomplete or invalid data is entered. | Fit | Validation messages will be provided for all fields which will instruct the user to correct the invalid data or enter mandatory data which was omitted. | N/A |



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|---|---------|--|--------------------------------------|
| FR-INT-069 | The Solution shall present the Applicant/Case Worker with a summary view of the information entered prior to submission. | Gap | During the application process the applicant is presented with a summary of information entered at the end of each section and a full summary at the completion of the application, just prior to signing and submitting the application. Caseworkers do not have access to applications until they have been submitted to PREE. | N/A |
| FR-INT-070 | The Solution shall allow an online Applicant to review the current application before and after formal submission. | Fit | Before submission, the applicant can review a summary of the application. After submission, the applicant can review a PDF of their application, which is provided by the portal, if the application was submitted by a user logged into their citizen account. | N/A |
| FR-INT-071 | The Solution shall require the Applicant/member to agree to all required affirmations and agreements, as defined by Puerto Rico, prior to accepting an application. | Fit | The Citizen Portal will display a page prior to application submission which includes and requires the applicant to confirm they have read and accept the Puerto Rico Medicaid Program's policy statements as defined by PRMP. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|---|--------------------------------------|
| FR-NT-005 | The Solution shall give Applicant/member a choice in viewing application status, coverage, and notices through an online channel. | Gap | An applicant/member with a Citizen Portal account will be able to view the status of applications they have submitted through the portal in this release. | N/A |
| G1-US-032 | The System shall have a cursor that shall automatically advance to the next logical input field when the maximum allowed numbers of characters have been entered for the keyed field or when the user presses the "Tab" key. | Gap | Cursor does not move automatically at the end of field, but validation does check that the value is within permitted ranges. Tab key moves to the next field. | N/A |
| G1-US-044 | The System shall allow for the request or entry of data from external devices (e.g. tablets). | Fit | The Citizen Portal supports multiple screen sizes, including tablet computers and mobile phones. | OOTB - Pending Approval |
| G1-US-062 | The System design shall accommodate rendering of the application in various form factors including Tablets and Mobile devices utilizing Microsoft, Android and Apple platforms | Fit | The Citizen Portal will support browsers running on Apple iOS, MacOS, Microsoft Windows and Android platforms. | OOTB - Pending Approval |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.l.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|---|--------------------------------------|
| G1-US-063 | The System shall be designed such that the user interface is automatically sized for an optimum view to the display dimensions of PC, tablet or mobile phone (e.g. a mobile phone user sees all information within their screen and does not need to scroll excessively to see content as the screen they are viewing was designed for a PC) | Fit | The Citizen Portal will support screen sizes used by mobile, tablet and PC devices. | OOTB - Pending Approval |
| G4-II-040 | The Mobile Friendly User Interface, pages shall automatically be sized for an optimum view to the display dimensions of PC, Tablet or Mobile phone and redirect to the appropriate URL.The Mobile Friendly System is not a separate mobile Application. | Fit | The Citizen Portal user interface uses a single Uniform Resource Locator (URL) which supports multiple display dimensions, commonly used on mobile, tablet and PC devices, through a web browser. | OOTB - Pending Approval |
| G6-RS-011 | The System shall comply with the PRDoH branding standards as defined by the PRDoH. | Fit | The Citizen Portal will be customized with PRDoH branding for home page, header and footer. | N/A |
| FR-AL-001 | The Solution shall have the ability to distribute notice-related alerts via email to the Applicant. | Fit | Citizen Portal will collect user's email address and send email upon notice generation. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|---|--------------------------------------|
| FR-ED-026 | The Solution shall allow Applicants/members, as defined by Puerto Rico, to submit verification materials electronically, by using a mobile device to send a photograph of the document using MMS (Multi Media Message) or email. | Fit | When the user clicks on browser, it allows user to select a photograph from their mobile device to be sent. | N/A |
| FR-ED-072 | The Solution shall have the ability to identify when an email delivery error occurs. | Fit | When an error occurs, a notice will be sent by postal mail to inform the user that PRMP tried to send them a notification via email or SMS text message, but it was unsuccessful. Instructions on how to correct their communication method and the message which could not be sent are included. | N/A |
| FR-INT-019 | The Solution shall allow Applicant/member to view application & renewal status, coverage, and notices through an online channel. | Fit | The Citizen Portal will display application and renewal status, and notices. | N/A |
| FR-INT-020 | The Solution shall allow Applicant/member ability to submit/update application or report changes through an online channel. | Fit | The Citizen Portal will allow submission of applications, renewals, and reports of change of circumstances. | N/A |



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|---|---------|---|--------------------------------------|
| FR-INT-022 | The Solution shall have the ability to display privacy notifications, including Section 508 compliance notifications, as defined by Puerto Rico. | Fit | The Citizen Portal OOTB provides a footer with links to PRMP Disclaimers, Privacy, and Accessibility message. | N/A |
| FR-INT-027 | The Solution shall allow an Applicant to specify or update their preferences. Preferences may include, but are not limited to:

i. Preferred method of communication (i.e., email, SMS/text, phone, etc.)

ii. Subscription to alerts and notifications (e.g., changes to client record, new messages, referral changes, etc.)

iii. Notification types desirediv. Language preference including notification (Spanish/English) | Fit | The Citizen Portal will allow the user to modify email address, cell phone, language, and paperless preference for online notices. | N/A |
| FR-INT-028 | The Solution shall generate a notification to the user that the personal preferences have been updated. | Fit | The Citizen Portal will send a notification to the user when communication settings (email, phone) are changed or paperless notices are selected. | N/A |



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.1.ii Completed Medicaid Application - Citizen Portal

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



I.4.2.p.ii Completed Citizen Mobile App
I.4.2.l.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|---|---------|---|--------------------------------------|
| FR-INT-058 | The Solution shall provide the capability to allow Applicants to apply for multiple public assistance programs online. | Fit | The Citizen Portal will allow users to apply for Medical Assistance (this application supports systematic evaluation for MAGI and Non-MAGI and manual evaluation for Spenddown) and Retroactive Medical Assistance. | OOTB - Pending Approval |
| FR-INT-060 | The Solution shall provide the capability for members to renew Medicaid eligibility through all modes (online, phone, fax, mail, in person). | Fit | The Citizen Portal will provide for online renewals; other modes are supported by the caseworker portal and discussed in the Renewal FDD. | N/A |
| FR-INT-066 | The Solution shall have the ability to alert Applicants/members prior to their un-submitted application being deleted at the end of a configurable Puerto Rico's defined time period. | Fit | When an application or renewal form reaches an age of 15 and 28 days, a reminder notification is sent to the user. On day 30, the form will be deleted. | N/A |
| FR-INT-113 | The Solution shall be able to receive and process applications, without human intervention. | Fit | The system will process applications submitted online. When PREE cannot complete the entire application processing, a task will be generated to notify a caseworker. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|---|--------------------------------------|
| FR-NT-005 | The Solution shall give Applicant/member a choice in viewing application status, coverage, and notices through an online channel. | Fit | Users will be able to view application status, view their coverage, and view/print their notices. | N/A |
| FR-NT-006 | The Solution shall generate and send a notice by regular mail notice to confirm and document an individual's decision to receive notices electronically. | Fit | A notice will be sent by postal mail to inform the user that they will not be receiving Notices by mail in the future. Notices can be viewed and printed from the Citizen Portal. | N/A |
| FR-NT-007 | The Solution shall generate and send a notice by regular mail notifying individuals of their right to change their election to receive notices electronically. | Fit | The notice which informs the user that they will not be receiving Notices by mail in the future includes a description of where to change this election. | N/A |
| FR-NT-008 | The Solution shall post electronic notices within 1 business day of notice generation and send an electronic communication alerting the individual that a notice was posted. | Fit | Notices are generated and made available on the Citizen Portal immediately, and a notification is sent to alert the user. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.1.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|--------------------|--|---------|--|--------------------------------------|
| FR-NT-009 | The Solution shall generate a notice of a failed electronic communication and send by mail within 3 business days from when the electronic communication is undelivered. | Fit | A notice will be sent by postal mail to inform the user that PRMP tried to send them a notification message, but it was unsuccessful. Instructions on how to correct their communication method and the message which could not be sent are included. The notice will be available for printing and mailing within 3 business days. The Central Printing process is responsible for the actual printing and mailing of the notice. | N/A |
| FR-NT-010 | The Solution shall generate and send a paper version of an electronic notice by mail upon Applicant/member request. | Fit | The Citizen Portal allows a user to request that a notice in the Citizen Portal be mailed to them. | OOTB - Pending Approval |
| FR-WM-033 | The Solution shall allow external users (Applicant/member) to have tasks assigned to them for completion of applications and redeterminations / recertifications. | Fit | The Citizen Portal will alert users of incomplete applications and pending renewals upon sign-in, through notifications, and notices which are visible on the citizen portal. | N/A |



I.4.2.p.ii Completed Citizen Mobile App

I.4.2.l.ii Completed Medicaid Application - Citizen Portal

| Requirement Number | Requirement Description | Fit-Gap | Implementation Details | Requirement Met OOTB Approval Status |
|---------------------------|---|----------------|--|---|
| T3.2.20 | The Workflow/BPM component shall support multiple forms of electronics notification channels and protocols for external users (e.g. text, page, SMTP, SNMP, SMS, etc.). | Gap | The Citizen Portal will notify users within the portal and by email or SMS text message <Pending Decision EE-DL00271>. | N/A |



15 Issue Register

| Issue # | Issue | Resolution | Resolution Date |
|------------|--|------------|-----------------|
| EE-AI01913 | PRMP internal review to determine if they have the legal authority to copy citizenship documentation used for verification. Upon resolution of the AI, if it is determined that PRMP does not have the legal authority the FDD will be reopened and updated. | | |

16 Deliverable Schedule

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