

Status: Resolved

Project: [Patient Access](#)

Component/s: None

Affects Version/s: None

Fix Version/s: [2025 JAN 31](#)

Type:	Story	Priority:	Major
Reporter:	Eric Fitzpatrick	Assignee:	Eric Fitzpatrick
Resolution:	Fixed	Votes:	0
Labels:	FS_Final, PO_Approved, PO_Pre-Approved, SQA_Required, team#MC		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original Estimate:	Not Specified		

Attachments: image-2025-01-14-07-25-44-572.png PAINT-54690.docx

Story Points: 5

Epic Link: [Infinitus: Automate BI Notifications](#)

Sprint: 2025-s1.1-Motley Crew

Assigned BSA: Olasumbo Sola-Ilori

Assigned DEV: Norbert Lesny

Assigned SQA: Divya Jammula

Approved By: fitzpate

Approved Date/Time: 23/Jan/25 9:35 PM

Team: Motley_Crew

Story Updates PAINT-54072

Background

100+ BIs were not autofaxed in production with reason that the Payer + Plan Product was not eligible. Based on inv PAINT-54683. it was observed that when looking up payers for the evaluation we use the 'Payer(s), Payer Hour(s)' directly on the SR to find Accounts which have the same name. It turns out there are multiple Accounts with the same types and these accounts have different usage in PACT.

The purpose of this story is to update the logic in step 1 to add a condition to only take Accounts with RecordType

User Story:

As a **Reimbursement Specialist, Reimbursement Planning OR Reimbursement Supervisor** I need to identify v autofax so that I can process them accordingly.

Current State

- Functionality to determine autofax eligibility for Infinitus has been implemented

Future State

[PAINT-54072](#)+ **Details highlighted red**

Related Stories:

[PAINT-51612](#)

[PAINT-51613](#)

[PAINT-51614](#)

[PAINT-51615](#)

[PAINT-51616](#)

[PAINT-52283](#)

[PAINT-4125](#)

[PAINT-31768](#)

[PAINT-35269](#)

[PAINT-37549](#)

[PAINT-50559](#)

[PAINT-50558](#)

Field Configuration / STM Mapping:

Future State Process Flow for Infinitus - https://lucid.app/lucidchart/2bc831c7-cd08-483d-8b1d-678643c0aa73/edit?invitationId=inv_3899e7c2-7cf0-4ab5-8f89-8ba704dde13e&page=KYkIgKrS~wt_#7cf0-4ab5-8f89-8ba704dde13e&page=t.lIR6QTuo7z#

Evaluate BI for Auto fax Process flow - <https://lucid.app/lucidchart/2bc831c7-cd08-483d-8b1d-678643c0aa73/edit?7cf0-4ab5-8f89-8ba704dde13e&page=t.lIR6QTuo7z#>

Text Color Guide:

- **Text in red** has been added as an update to a previously developed Story and AC. The previously developed listed in either the "Prerequisite stories" or the "As-Is state" and "To-Be state" sections.
- **Text in orange** has been added as a mid-sprint update during the current sprint.

Compliance Impact: **This section is REQUIRED and will be completed (&BSA)**

Any New Objects or New Fields or New Picklist added as part of this story? **No**

If Yes, complete the gSheet by filling in all the information in the TAB allocated to the Team

[PACT New Fields / Objects / Picklist Inventory](#)

Assumptions:

Eligibility Criteria for Auto Fax:

Step 1: Payer + Product + Plan is Enabled for Autofax

- **Look up Payer(s), Payer Hour(s) field on Service Request to identify Payer Name**
- **Search all Accounts in PACT to identify Account Name = Payer Name on SR AND Account Record Type**
- If Payer+Product+Plan is enabled for autofax in AI BI Products Related List on Payer Account , then **BI ma**

Step 2: Multiple BI Records With Same Payer Exist= No

In order for the Service Request to be eligible for autofax, there must be ONLY one Infinitus BI completed for a payer. If there is more than one BI record on the service request **with same payer**, then **all BIs within the service request that have same payer are**

If there is only one BI record for a payer on the service request, the **BI maybe autofax eligible**

Step 3: Insurance Rank

Single BI - Not eligible for autofax IF insurance rank on BI != Primary

Multiple BIs - Not eligible for autofax IF

- There is no BI with insurance rank = Primary OR
- There is more than one BI with insurance rank = primary

Step 4: Diagnosis code is Active and FDA Approved

If diagnosis code captured on **Infinitus** BI record (**ie. BI Method = AI**) (Field-Vendor Diagnosis code for BI) exists on Service Eligibility record with 'Record status' = "Active" and 'FDA Approved' picklist value is "Yes", **this implies BI is active and BI maybe autofax eligible**

Step 5: PC BI Status

BI maybe autofax eligible if BI Status on Product Coverage record !=

- Exclusion-Diagnosis OR
- Exclusion-Drug OR
- Insurance Terminated OR
- No Benefit OR
- Denied

Step 6: PIE Loaded on BI Sidebar = Yes or No

If there's a PIE record loaded on BI sidebar based on logic in PAINT-51614. **then BI maybe eligible for autofax**

If there's **no** PIE record loaded on BI sidebar based on logic in PAINT-51614. **then BI maybe eligible for autofax**

Step 7: PI/Alpha Prefix and BI Results Match

For each of the BI fields below, compare the value in Column C in screenshot below (from BI record) and value in Column D below (from loaded PIE on sidebar account). If the values match for **ALL the applicable** fields below, **BI maybe eligible for autofax**

- **Prior Auth Required AND PA Status (matching values may be found in lines 2-3 below)**
- **Prior Auth Required (matching values may be found in lines 4-5 below)**
- **PreDetermination (matching values may be found in lines 6-9 below)**
- **Step Edit (matching values may be found in lines 10-11 below)**
- **PCP Referral Required? Exclude for PPO (matching values may be found in lines 12-13 below)**
- **Buy and Bill (matching values may be found in lines 14-17 below)**

Note:

- **Where there is no prior authorization record, assume Step Edit = No**
- **Do not consider "NULL" value when matching for PreD**

Step 8: Additional PC Records on BI

Check if there are additional PC records on BI. **All additional PC records have to be evaluated from step 3 before BI eligibility can be determined**

Step 9: Additional BI Records with Different Payer on SR

Check if there are additional BI records with different payer on SR. **All additional BI records (with different payer) have to be evaluated from step 3 before BI eligibility can be determined**

Acceptance Criteria:

Acceptance Criteria 1: System Initiates Autofax Evaluation In 5 Scenarios

Given: Service.Request_Type = **Benefits Investigation/Prior Authorization**
And: SR Owner = **Approval Request**
And: SR.Status = **Review BI**
And: BI.status= **Completed**
And: SR.AI Status = **Successful**
Then: System initiates Autofax evaluation process in the 5 scenarios below

**Note: If an SR meets the criteria above but does not have a BI that matches any of the scenarios below, stamp SR with "Not
enabled for Evaluation" in AI Autofax Status on SR**

Scenario	Prior Auth	Does Prior Auth	PA Status on Prior	PA.Recertification Date is	New
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	required	Type on Product Coverage record Contain Form ?	Authorization	6 weeks or Less	Insurance Found
A	Value = No for ALL Product Coverage records under the BI	-	-	-	NO
B	Value = Yes for at least one Product Coverage record under the BI	NO (on all PC records in BI where Prior Auth required = YES)	-	-	NO
C	Value = Yes for at least one Product Coverage record under the BI	Yes (on all PC records in BI where Prior Auth required = YES)	Value != Approved (on all PA records in BI where Prior Auth required = YES on PC)	-	NO
D	Value = Yes for at least one Product Coverage record under the BI	Yes (on all PC records in BI where Prior Auth required = YES)	Value = Approved (on all PA records in BI where Prior Auth required = YES on PC)	NO (On all Prior Authorization records in BI where Prior Auth required = YES on PC)	NO
E	Value = Yes for at least one Product Coverage record under the BI	Yes (on all PC records in BI where Prior Auth required = YES)	Value = Approved (on all PA records in BI where Prior Auth required = YES on PC)	YES (On all Prior Authorization records in BI where Prior Auth required = YES on PC)	NO
Acceptance Criteria 2: Evaluate BI for Autofax					
Given: Scenario A or B or C or D or E occurs based on AC1					
Then: Each BI record within the Service Request is evaluated for auto fax based on logic below (Refer to evaluation details)					
Scenarios	Evaluation Step	Eligible for Autofax			Not Eligible for Autofax
A,B,C,D,E	1	Autofax evaluation is incomplete			Stamp AI Autofax S Not enabled for aut

	Go to Step 2	Autofax evaluation is complete.
A,B,C,D,E 2	Autofax evaluation is incomplete Go to Step 3	Stamp AI Autofax Status on Dual Diagnosis Code Autofax evaluation is complete.
A,B,C,D,E 3	Autofax evaluation is incomplete Go to Step 4	Stamp AI Autofax Status on Insurance Rank Autofax evaluation is complete.
A,B,C,D,E 4	Autofax evaluation is incomplete Go to Step 5	Stamp AI Autofax Status on Diagnosis Autofax evaluation is complete.
A,B,C,D,E 5	Autofax evaluation is incomplete Go to Step 6	Stamp AI Autofax Status on BI Status <BI Status Autofax evaluation is complete.
A,B,C,D,E 6	If PIE is loaded on BI sidebar, Autofax evaluation is incomplete. Go to Step 7 If no PIE is loaded on BI sidebar, Autofax evaluation is incomplete. Go to Step 8	
A,B,C,D,E 7	Autofax evaluation is incomplete. Go to Step 8	Stamp AI Autofax Status on PIE Conflict Autofax evaluation is complete.
A,B,C,D,E 8	No additional PC records, Autofax evaluation is incomplete. Go to Step 9 If additional PC records, Autofax evaluation is incomplete. Go to step 4	
A,B,C,D,E 9	No additional BI records, BI is confirmed eligible for autofax and Autofax evaluation is complete If additional BI records, Autofax evaluation is incomplete. Go to step 4	
Acceptance Criteria 3: Stamp AI Autofax Status on SR When Evaluation Is Completed		

Given AC2 occurs

When: Autofax evaluation is complete

And: BI is confirmed eligible for autofax

Then: Stamp the status below on the SR - **AI Autofax Status**

Condition 1 - Step 5	Condition 2 - Step 6	Condition 2 - Step 8
No matching PIE loaded on sidebar	-	No additional BI records
Matching PIE record loaded on sidebar	PIE matches BI results from Infinitus	No additional BI records
Matching PIE record loaded on sidebar	PIE matches BI results from Infinitus	Additional BI record exists on SR with no matching PIE loaded on sidebar

Note: If an SR meets the criteria in AC1 but does not have a BI that matches any of the scenarios in AC1, stamp "Not enabled for Evaluation" in AI Autofax Status on SR

Testing Notes:

Scenarios for testing: Refer to PO comments

Comments

Comment by [Eric Fitzpatrick](#) [23/Jan/25]

PO DEMO: Approved

Comment by [Divya Jammula](#) [20/Jan/25]

Hi Team,

Testing has been completed in PPSQA and is working as expected. Kindly refer the attached document. [PAINT-54690.docx](#)

c; [Aksana Shchasnaya](#), [Olasumbo Sola-Ilori](#), [Eric Fitzpatrick](#)

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