LTC Facility Fax Generation

Functional Specification

# Summary

In order to reduce a painfully and unnecessarily manual process, the template and generation of patient list faxes sent to Long Term Care facilities is to be automated. This automation will leverage existing workflows in the Document Campaign process used for TMR and Offer letters. The automation will also allow for easy extension of this add-on service to other clients in the future.

The project will be phased, introducing most of the improvement in phase one and the full end-to end automation in phase 2.

# Functional Directives

1. The system will allow for the creation of campaigns of type LTC letter.
2. The system will allow for the queuing of the patient, client, and facility data necessary for creation of individual documents.
3. The system will require the following elements of client data:
   1. Client Name
   2. Client Custom Cover Letter Text, if applicable
   3. Client Logo, if applicable
4. The system will require the following elements of facility data:
   1. Facility Name
   2. Facility Phone Number
   3. Facility Fax Number
5. The system will require the following elements of patient data:
   1. Patient Name
   2. Patient Date of Birth
6. The system will produce PDF documents which consist of a fax cover sheet, an optional cover letter, and a patient list; the optional cover letter and patient list will optionally display the client logo and will optionally display the PMD logo.
7. The system will allow for the patient list to have from 1 to an unlimited number of patients.
8. In phase one, the system will render each batch of documents into a single PDF of collated individual facility faxes, expecting that PDF to be printed and then faxed.
9. In phase two, the system will render each facility fax to a separate PDF, and enter them in the Faximinion queue for automated sending.

# Algorithms

No advanced operations or calculations in this project require explicit algorithms to be elucidated.

# Versions

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Author | Note |
| 1 | 3/9/2018 | Jake Woods | Initial Version |
| 2 | 3/9/2018 | Jake Woods | Addition of directives for phase 2 of the project. |

# Reviewer Comments

None.

# Transmittals

## Approvals:

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Approval Date | Notes |
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## CC:

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