LTC Facility Fax Generation

Business Requirements – Short Term Solution

# Summary

Currently, PharmMD is provided with a file indicating which members of a Health Plan are in a Long Term Care (LTC) facility. For at least one client currently, and ideally for any client, we need to send faxes of patient information to the facility to prepare them for a call offering a CMR to the LTC facility resident(s).

The current process is unacceptably manual. This document outlines the requirements for a mostly automated process which will leverage existing structures to remove the manual components from today’s methods.

Facilities with only one patient are currently placed on a separate dialer call list; Facilities with multiple patients are given a specific follow-up call once the fax has been sent. Any changes to these call processes are in not in scope for this phase of this project.

# Actors

* Fulfillment Coordinator
* Letter Technician

# Use Cases:

* Generate a PDF

# User Stories:

## Use Case: Generate a PDF

1. As the Letter Technician, I want to create a document campaign of type “LTC Fax” so that I can capture the information for PDF Generation.
2. As the Letter Technician, I want to have a document template which allows for a fax cover sheet, an optional cover letter with client-specific language, a dynamic client logo, and a list of patients for the target facility, so that I can use the same process to generate letters for any client.
3. As the Letter Technician, I want to queue documents for a document campaign of type “LTC Fax” so that I can generate faxable PDF documents for LTC facilities.
4. As the Fulfillment Coordinator, I want to review the generated PDF documents before they are faxed to the facility.

# Approvals

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| --- | --- | --- | --- |
| Name | Role | Approval | Date |
| Allison Wilson | Fulfillment Coordinator |  |  |
| Cynthia Sandahl | Letter Technician |  |  |

# CC

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| Name | Role |
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# Reviewer Comments

None.

# Versions

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| --- | --- | --- | --- |
| Version | Date | Author | Notes |
| 1 | 3/7/18 | Jake Woods | Initial Version |
| 2 | 3/8/18 | Jake Woods | Augmented use case regarding dynamic logo to include all client dynamic options. |