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| **Business Requirement Document (BRD)**  **A Patient Portal Management software** |

**Project**: Manage My Patient (MMP)

**Client:** North America Medical Technology Group (NAMTG)

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| **Date** | **Version** | **Description** | **Author /**  **Developers** |
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# Introduction

## Purpose of this document

## Intended Audience

* Business Analyst
* QA Tester
* QA Test Lead
* QA Manager
* Developers
* Project Manager
* Technical Architect
* System Engineers
* Configuration management team

## Scope

Limited to the requirements given in this document.

# General overview

## Technologies used

Manage My Patient is a web based application. We used MySQL, Dream viewer, Apache server, and PHP and Web services. The technologies and component are open source.

# Technical requirement

**4. SYSTEM FUNCTIONS**

**4.1 All Use Case Overview:**

**Patient**

1. Register Account
2. Login Account
3. Edit Profile
4. Schedule Appointment
5. View Information
6. Pay Fees
7. View Reports
8. View History
9. Send message
10. Search Symptoms
11. Logout

**Admin**

1. Register Account
2. Login Account
3. User tab
4. Claim center tab
5. Validating the claim center tab
6. Patient tab
7. Create Visit
8. Add prescription
9. Create Fees
10. Reports Tab
11. Messages Tab
12. Logout

**Doctor**

1. Register Account
2. Login Account
3. Edit Account
4. Add Prescription
5. Add Reports
6. Logout

**Insurance Provider**

01 Register Account

02 Login Account

03 Edit Account

04 Update Claim

05 Logout Account

**Admin Module**

| Use Case Name | Register Account | |
| --- | --- | --- |
| **Use case ID** | **ADM001** | |
| **Use Case Description** | Functionality allows Administrator to create a new account by entering specified details. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **ADM001.1:**User enters the home page URL in the browser | | **ADM001.2:** System shall display default home page with following:  Home, Patient Login, Office Login, About Us Contact Us tabs across the top |
| **ADM001.3:** Administrator can click on the register button on the Login screen which opens up by scrolling down on the main page | | **ADM001.4:** Office Administrators can register with following fields.   1. First Name – required field 2. Last Name - required field 3. User Name - required field - max 10 characters without any special characters/blank spaces 4. Password - required field - max 6 characters with at least one numeric and one uppercase and should not include blank spaces. 5. Confirm Password - required field and match with the password field 6. Save Button   Verify if the user is able to register and navigates to the Admin login page after system confirms “Admin Registration Successful” Message. |
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| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
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| **ADM001.5:** If Admin enter invalid values in each field for registration page and click “Save” | | **ADM001.6:**  System should display error message   1. Please enter first name 2. Please enter last name 3. Please enter Username 4. Pease enter password 5. Please enter confirm Password 6. Please enter valid email id     If the password and confirm password didn’t match, error message is “Please enter same value for both password and confirm password fields |
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| Use Case Name | Login as Admin | |
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| **Use case ID** | **ADM002** | |
| **Use Case Description** | This use case describes how to login as administrator to MMP application. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **ADM002.1:** MMP Home page, Office Login, Click Login for Admin Login window. | | **ADM002.2:**  Login window contains following fields / hyperlinks.  A) Username: required field to enter valid registered user name  B) Password: required field to enter valid password  C)Hyper link: forgot Username / Password:  D) SIGN IN Button  E) REGISTER Button  After Login: Administrator home page should display with   1. Home: with patient list 2. Users: 3. Claims Center 4. Patients 5. Indicate Availability 6. Messages 7. Logout |
| **ADM002.3:**  Hyper link: forgot Username / Password | | **ADM002.4:**  System will prompt the user to enter the email id to recover the password by entering the registered email ID. If The user enter valid email id and click Send, User receive an email with password. |
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| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
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| **ADM002.5:**Enter invalid admin login id and password | | **ADM002.6**: If blank user id or password, “Please fill out this field”  If invalid username or password: error message should popup.  “Wrong username and password.” |

| Use Case Name | User Tab for Admin | |
| --- | --- | --- |
| **Use case ID** | **ADM003** | |
| **Use Case Description** | This use case describes how to select/change/upgrade the status to Accepted/Pending/Requested from the dropdown menu. | |
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| **Actor** | | **System** |
| **ADM003.1:** User should click on the Users tab in the home page of | | **ADM003.2:** System shall display page with Admin portal with “Search for patient by status” with ‘Select Status’ dropdown menu to display “ Accepted/ Pending/ Rejected options and all the patients name with their SSN number. |
| **ADM003.3**: User shall select the Accepted/Pending/ Rejected tabs from the dropdown box of the ‘Select Status’ Textbox | | **ADM003.4:** System shall display all the names of patients with their SSN based on the selected tab from the dropdown box. |
| **ADM003.5:** User shall click on the name of the patient in the ‘Users” tab to view all the personal details and update any information on the patient | | **ADM003.6:** System will display a window pop up with all the personal details of the Patient like:   1. First Name 2. Last Name 3. License 4. SSN 5. Address 6. Age 7. Weight 8. Height 9. City 10. State   Status and a ‘Submit’ button |

| Use Case Name | Claims Center Tab for Admin |
| --- | --- |
| **Use case ID** | **ADM004** |
| **Use Case Description** | This use case describes how the Admin can view the Claims and modify any changes in the patient personal details |
| **Actor** | **System** |
| **ADM004. 1:**  User clicks on Claims Center Tab in the home page | **ADM004. 2:** System displays a popup window to Search patient by Name or SSN. And also a new patient can be added by entering the Name and the SSN |
|  | |
| **ADM004.3:** Enter the Name or SSN of a patient to see the list of patients with the name given. | **ADM004.4: The System displays a page which shows the information of the patient like Name, Age and SSN** |
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| **ADM004.5**: Click on the Patient name to check the detailed page of Submit Claims | **ADM004.6:**System displays a page, which shows the details of the ‘Submit a Claim’ window. It would have textboxes to enter the Patient details like   1. First Name 2. Last Name 3. DOB 4. Sex 5. Work Status 6. Insurance Policy or Group Number 7. Referring Doctor Name   Service Fields   1. Modifier Code 2. NPI Code 3. CPT Code 4. ICD code |

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| **Flow of Events: Alternate Path** | |
| **Actor** | **System** |
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| **ADM004.7:** User enters invalid Name or SSN in the Admin portal of the User’s tab | **ADM004.8:**  System should not display any information but just blank textboxes with Name and SSN. |
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| Use Case Name | Validating the Submit Claims Page for Admin | |
| --- | --- | --- |
| **Use Case ID** | **ADM005** | |
| **Use case Description** | This use case describes how to validate the fields on Submit Claims page for Admin. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **ADM005.1**  The User shall enter all the valid credentials for the Submit Claims page in order to Submit the Claim. In the ‘Service field’ all the codes should be selected from the dropdown menu respectively.  Click on Submit Claim button | | **ADM005.2:** If the User has entered all the valid credentials the system will display  “**INSERTED**” below the Submit Claims on the page. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
|  | | |
| **ADM005.3**  Insert all the invalid credentials for the Submit Claims page fields. | | **ADM005.4:** Error messages should be displayed for each field when invalid data is entered. Along with a pop up window displaying ”**Terms Rejected. Cannot Proceed…**” |
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| Use Case Name | Patients tab for Admin | |
| --- | --- | --- |
| **Use case ID** | **ADM006** | |
| **Use Case Description** | This Use case describes on how an Admin can validate the fields of Patients tab | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **ADM006.1**Click on Patients tab on the main Admin page | | **ADM006.2:** The system navigates the page to Search Patient by Name, SSN page with search button window |
| **ADM006.3:**  Click on the Patients name after entering the patient name and clicking on search button in the ‘Search Patient’ window | | **ADM006.4:** User should get navigated to the page with following  1.Create Visit  2.Add Prescription  3.Create Fee  4.Reports |

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| **Use case Name** | **Create Visit tab for Admin** |
| **Use case ID** | **ADM007** |
| **Use Case Description** | This Use case describes how a user can book appointments using the ‘Create Visit’ button from the Patients Tab |
| **Actor** | **System** |
| **ADM007.1:**  Click on the ‘Create Visit’ button on the patient tab to book an appointment | **ADM007.2:** The system displays a list of doctors and a button to Book an appointment |
| **ADM007.3:** User shall click on ‘Book Appointment’ button | **ADM007.4:**The System navigates to a page which displays the popup window with Date, Time details |
| **ADM007.5:** User shall select the date, time and click on ‘Continue’ button | **ADM007.6:** System shall display a page to enter the Symptoms. |
| **ADM007.7**: User shall enter the symptoms of the patient and click on ‘Submit’ button | **ADM007.8:** System shall navigate to the Patient Tab homepage. |
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| **Use case Name** | **Add Prescription Tab for Admin** |
| **Use case ID** | **ADM008** |
| **Use Case Description** | This use case describes how a user can add prescriptions |
| **Actor** | **System** |
| **ADM008.1:**Click on the Patients name after entering the patient name and clicking on search button in the ‘Search Patient’ window | **ADM008.2:**  User should get navigated to the page with following  1.Create Visit  2.Add Prescription  3.Create Fee  4.Reports |
| **ADM008.3:** User shall Click on the ‘Add prescriptions ‘ textbox | **ADM008.4:** System shall display a page prompting to enter the Prescription details and Click on ‘Submit’ button |
| **ADM008.5:** User shall enter the Prescription details and click on ‘Submit’ button | **ADM008.6**: System will display a message saying’ Prescription is added’ and a Ok button to confirm |
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| **Use case Name** | **Create Fee Tab for Admin** |
| **Use case ID** | **ADM009** |
| **Use Case Description** | This use case describes how a user can Create Fees and enter the Fee details |
| **Actor** | **System** |
| **ADM009.1:**Click on the Patients name after entering the patient name and clicking on search button in the ‘Search Patient’ window | **ADM009.2:**  User should get navigated to the page with following  1.Create Visit  2.Add Prescription  3.Create Fee  4.Reports |
| **ADM009.3:** User shall Click on the ‘Create Fee ‘ textbox | **ADM009.4:** System shall display a page prompting to select the appointment Service from the drop down menu, the Fee field gets auto populated and Click on ‘Submit’ button |
| **ADM009.5:** User shall enter the Appointment, Service from the drop down menu, the Fee field gets auto populated and Click on ‘Submit’ button | **ADM009.6**: System will display a message saying’ **Fee Successfully Entered’** and a Ok button to confirm |

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| **Use case Name** | **Reports Tab for Admin** |
| **Use case ID** | **ADM0010** |
| **Use Case Description** | This use case describes how a user can Create reports and enter the report details |
| **Actor** | **System** |
| **ADM0010.1:**Click on the Patients name after entering the patient name and clicking on search button in the ‘Search Patient’ window | **ADM0010.2:** User should get navigated to the page with following  1.Create Visit  2.Add Prescription  3.Create Fee  4.Reports |
| **ADM0010.3:** User shall Click on the ‘Reports ‘ textbox | **ADM0010.4:**System shall display a page prompting to enter the detailed report the appointment, Scanned Report (if any) and write down the description related to report and click on Submit button. |
| **ADM0010.5:** The User enters all the report details and clicks on the Submit button | **ADM0010.6:** The system will navigate the user to the Patients tab Homepage |

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| **Use case Name** | **Messages Tab for Admin** |
| **Use case ID** | **ADM0011** |
| **Use Case Description** | This use case describes how Messages tab works for the Admin |
| **Actor** | **System** |
| **ADM0011.1:**User shall click on the Messages tab on the Home page | **ADM0011.2:** User should get navigated to the Messages page with Patient Name, Reason and Date |
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| **Use case Name** | **Logout for Admin** |
| **Use case ID** | **ADM0012** |
| **Use Case Description** | This use case describes how Admin can logout of the system |
| **Actor** | **System** |
| **ADM0012.1:**User shall click on the Logout tab on the Home page | **ADM0012.2:** System shall exit out of the Home page and display the Admin-Login page |

**Doctor Module**

| Use Case Name | Register Account | |
| --- | --- | --- |
| **Use case ID** | **DOC001** | |
| **Use Case Description** | Functionality allows doctor to create a new account by entering specified details. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **DOC001.1:**Doctor shall launch the MMP application by entering the URL in a web browser. | | **DOC001.2:** System shall display application’s home page with the tabs: Home, Patient Login, Office Login, About Us, and Contact Us across the top. |
| **DOC001.3:** Doctor shall click on “Office Login”. | | **DOC001.4:** System shall scroll down to display “Doctor’s claim settlement made easy” message along with a Login button and an up arrow to scroll back up to the top of home page. |
| **DOC001.5:** Doctor shall click on “Login” button. | | **DOC001.6:** System shall display an office login page, with Admin Login to the left and Doctor Login to the right, both with: Username,  Password, Forgot Username/Password Link, “Sign In” button and “Register” button. |
| **DOC001.7:** Doctor shall click on the “Register” button of the Doctor’s login functionality. | | **DOC001.8:** System shall load registration page with tabs: First Name, Last name, Username, Password, Confirm Password, Office code and a “Save” button. |
| **DOC001.9:** Doctor shall enter valid values in each field and click on the “Save” button. | | **DOC001.10:** System shall display “Thank you for registering with MMP” pop up window. |
| **DOC001.11:** Doctor shall click on the “OK” button on the pop up window. | | **DOC001.12:** System shall take the Doctor back to the login page. |

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| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
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| **DOC001.13:** Doctor shall enter invalid or blank values in each field and click on the “Save” button. | **DOC001.14:** System shall display error message. | |

| Use Case Name | Login Account | |
| --- | --- | --- |
| **Use case ID** | **DOC002** | |
| **Use Case Description** | Doctor can sign into existing account by entering valid credentials. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **DOC002.1:**Doctor shall launch the MMP application by entering the URL in a web browser. | | **DOC002.2:** System shall display application’s home page with the following tabs: Home, Patient Login, Office Login, About Us, Contact Us |
| **DOC002.3:** Doctor shall click on “Office Login”. | | **DOC002.4:** System shall scroll down to display “Doctor’s claim settlement made easy” message along with a Login button and an up arrow to scroll back up to the top of home page. |

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| **DOC002.5:** Doctor shall click on “Login” button. | | **DOC002.6:** System shall display an office login page, with Admin Login to the left and Doctor Login to the right, both with: Username,  Password, Forgot Username/Password Link, “Sign In” button and “Register” button. |
| **DOC002.7:** Doctor shall enter valid username and password and click on the “Sign in” button of the Doctor’s login functionality. | | **DOC002.8:** System shall display doctor’s portal page with tabs: Home, Account, Logout to the left and a “Search Patient by Name and SSN” panel in the center, to facilitate search/pull up a patient by Name/SSN |
| **Flow of events: Alternate Path** | | |
| **Actor** | | **System** |
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| **DOC002.9:** Doctor shall enter invalid or blank values in each field and click on the “Sign in” button. | **DOC002.10:** System shall display error message. | |

| Use Case Name | Edit Account | |
| --- | --- | --- |
| **Use case ID** | **DOC003** | |
| **Use Case Description** | This use case describes how users can Change Password. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **DOC003.1:** Doctor shall click on “Account” tab from the Doctor portal home page. | | **DOC003.2:** System shall display Username, Current Password, New Password, and Confirm Password fields with “Update” button. |
| **DOC003.3:** Doctor shall enter all valid field values and click on “Update” button. | | **DOC3.4:** System shall reload doctor’s portal page with success message. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
| **DOC003.3:** Doctor shall enter all invalid/blank field values and click on “Update” button. | | **DOC003.4:** System shall display error message**.** |

| Use Case Name | Add Prescription |
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| **Use case ID** | **DOC004** |
| **Use Case Description** | This Use case describes how a Doctor can add prescriptions |
| **Flow of events: Happy Path** | |

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| **Actor** | **System** |
| **DOC004.1:** Doctor shall click on a patient tab from the  Home screen’s search patient feature. | **DOC004.2:** System shall display Patient name with “Add Prescription” button and “Reports” button. |
| **DOC004.3:** Doctor shall click on “Add Prescription”. | **DOC004.4:** System shall display Add Prescription Page with Select Appointments, Prescription Name, Prescription Description fields and a “Submit” button. |
| **DOC004.5:** Doctor will enter all valid values and click on  “Submit” button | **DOC004.6:** System shall display the doctor’s portal home screen. |
| **Flow of Events: Alternate Path** | |
| **Actor** | **System** |
| **DOC004.7**Doctor shall enter all invalid/blank field values and click on “Submit” button. | **DOC004.8:** System shall display the error message**.** |

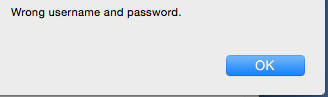
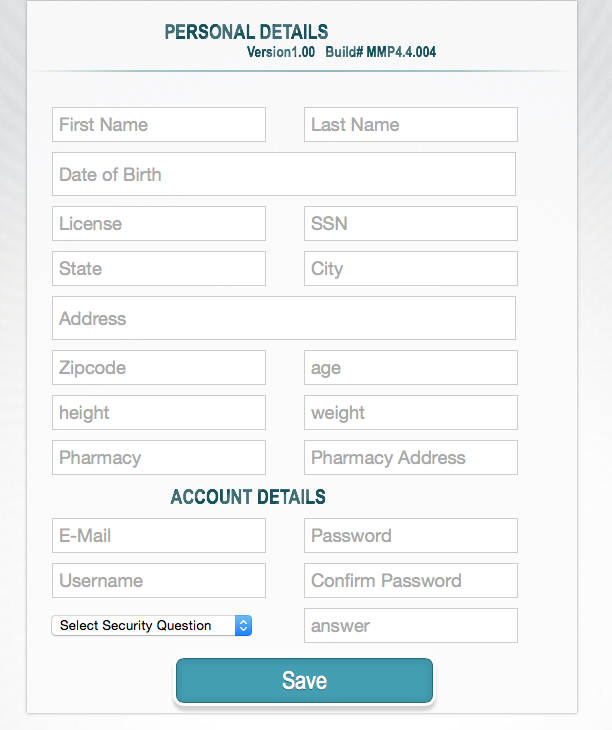
| Use Case Name | Add Reports | |
| --- | --- | --- |
| **Use case ID** | **DOC005** | |
| **Use Case Description** | This use case is used by the doctor to Create Patient Report | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **DOC005.1:** Doctor shall click on a patient tab from the  Home screen’s ‘Search patient’ feature. | | **DOC005.2:** System shall display the Patient name with “Add Prescription” button and “Reports” button. |

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| **DOC005.3:** Doctor shall click on “Reports”. | **DOC005.4:** System shall display the Reports Page with Select Appointments, Report Name fields, Choose File button, Report Description field and a “Submit” button. |
| **DOC005.5:** Doctor will enter all valid values, attach a report file using “Choose file” button and click on  “Submit”. | **DOC005.6:** System shall display the doctor’s portal home screen. |
| **Flow of Events: Alternate Path** | |
| **Actor** | **System** |
| **DOC005.7:**Doctor shall enter all invalid/blank field values and click on “Submit” button. | **DOC005.8:** System shall display error message**.** |

| Use Case Name | Logout | |
| --- | --- | --- |
| **Use case ID** | **DOC006** | |
| **Use Case Description** | Logging off the Account | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **DOC006.1:** Doctor shall click on logout tab from the doctor portal home screen. | | **DOC006.2:** System shall logout of account and display doctor’s login page. |

**Patient Module**

| Use Case Name | Register Account | |
| --- | --- | --- |
| **Use case ID** | **PAT001** | |
| **Use Case Description** | Functionality allows patient to create a new account by entering specified personal details. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT001.1:**Patient shall launch the MMP application by entering the URL in a web browser. | | **PAT001.2:** System shall display application’s home page with the tabs: Home, Patient Login, Office Login, About Us, and Contact Us across the top. |
| **PAT001.3:** Patient shall click on “Patient Login”. | | **PAT001.4:** System shall scroll down to display “Now it is really simple to Claim your Insurance” message with a Login button and a Register button, along with an up arrow to scroll back up to the top of home page. |
| **PAT001.5:** Now patient shall choose one of the two paths, a or b:   1. Click on Register button. 2. Click on Login button, which displays patient login page, with username, password fields, forgot username/password link, and Sign In, Register buttons. Patient shall click on the Register button. | | **PAT001.6:** System shall display the registration page with the following personal and account details fields, and a Save button.  Personal details fields with its data validation rules:  First Name (mandatory, alphabets only)  Last Name (mandatory, alphabets only)  Date of Birth (mandatory, MM/DD/YYYY)  License (mandatory, numeric, 8 char length)  SSN (mandatory, unique, numeric, 9 char length)  State (mandatory, alphabets only)  City (mandatory, alphabets only)  Address (mandatory, alphanumeric, spaces)  Zip code (mandatory, numeric, 5 char length)  Age (mandatory, numeric)  Height (mandatory, numeric)  Weight (mandatory, numeric)  Pharmacy (optional, alphanumeric, spaces)  Pharmacy Address (optional, alphanumeric, spaces)  Account details fields with its data validation rules:  Email (mandatory, valid unique email id)  Username (mandatory, unique, alphanumeric, minimum 4 char length)  Select security question (mandatory, dropdown list choices)  Answer (mandatory, alphanumeric, spaces)  Password (mandatory, alphanumeric, minimum of one uppercase, lowercase, numeric each, minimum 8 char length)  Confirm password (mandatory, match password field entry) |
| **PAT001.7:** Patient shall enter valid values in each field and click on the “Save” button. | | **PAT001.8:** System shall display “Thank you for registering with MMP” pop up window. |
| **PAT001.9:** Patient shall click on the “OK” button on the pop up window. | | **PAT001.10:** System shall take the patient back to the MMP application’s home page. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
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| **PAT001.11:**  Patient shall enter invalid or blank values in each field and click on the “Save” button. | | **PAT001.12:** System shall display error message. |



| Use Case Name | Login Account | |
| --- | --- | --- |
| **Use case ID** | **PAT002** | |
| **Use Case Description** | Patient can sign into existing account (that has been approved by the admin already from the admin module), by entering valid credentials. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT002.1:**Patient shall launch the MMP application by entering the URL in a web browser. | | **PAT002.2:** System shall display application’s home page with the tabs: Home, Patient Login, Office Login, About Us, and Contact Us across the top. |
| **PAT002.3:** Patient shall click on “Patient Login”. | | **PAT002.4:** System shall scroll down to display “Now it is really simple to Claim your Insurance” message with a Login button and a Register button, along with an up arrow to scroll back up to the top of home page. |
| **PAT002.5:** Patient shall click on “Login” button. | | **PAT002.6:** System shall display login page with fields for Username and Password, a forgot username/password link, and “Sign In” and “Register” buttons. |
| **PAT002.7:** Patient shall enter valid username and password values, and click on the “Sign in” button. | | **PAT002.8:** System shall display patientportal’s home screen with 8 tabson the left: Home, Profile, Schedule Appointment, Information, Fees, Search Symptoms, Messages, Logout, and patient’s current appointments in the center. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
|  | | |
| **PAT002.9:** Doctor shall enter invalid or blank values in each field and click on the “Sign in” button. | | **PAT002.10:**System shall display error message. |

| Use Case Name | Edit Profile | |
| --- | --- | --- |
| **Use case ID** | **PAT003** | |
| **Use Case Description** | Patient can view and edit his profile. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT003.1:** Patient shall click on “Profile” tab from the patient portal home page. | | **PAT003.2:** System shall display uneditable patient’s personal details which are first name, last name, license, SSN, address, age, weight, height, city, state, zip code, and uneditable medical relationships provider, insurance information followed by Edit, View History, View Reports buttons. |
| **PAT003.3:** Patient shall click on the “Edit” button. | | **PAT003.4:** System shall reload the page with all editable fields followed by Save, View History, View Reports buttons. |
| **PAT003.5:** Patient shall edit the fields with valid values and click on “save” button. | | **PAT003.6:** System shall display a pop up window with success message and “OK” button. |
| **PAT003.7:** Patient shall click on “OK” button. | | **PAT003.8:** System shall reload uneditable profile page again. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
| **PAT003.9:** Doctor shall enter all invalid/blank field values and click on “Save” button. | | **PAT003.10:** System shall display error message**.** |

| Use Case Name | Schedule Appointment | |
| --- | --- | --- |
| **Use case ID** | **PAT004** | |
| **Use Case Description** | Patient can schedule an appointment by viewing the profiles of the doctors working in the practice and choose a doctor to book an appointment with. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT004.1:** Patient shall click on “Schedule Appointments” tab from the patient portal home page. | | **PAT004.2:** System shall display all current appointments as well as “Create New Appointment” button. |
| **PAT004.3:** Patient shall click on “Create New Appointment”. | | **PAT004.4:** System shall display “Providers/Doctors” page where all the doctor’s name and descriptions that are working in the practice are displayed, along with a “Book Appointment” button for each doctor. |
| **PAT004.5:** Patient shall click on “Book Appointment” under specific doctor. | | **PAT004.6:** System shall display a “Book Appointment” window with Date, Time fields and a “Continue” button. |
| **PAT004.7:** Patient shall choose a specific date from the displayed calendar in the Date field, where available dates are enabled, and the rest are disabled. | | **PAT004.8:** System shall display the selected date in date field. |
| **PAT004.9:** Patient shall choose a specific time slot from the drop down list of available time slots and shall click on the “Continue” button. | | **PAT004.10:** System shall display a box to enter symptoms. |
| **PAT004.11:** Patient shall enter symptoms in the box and click on “submit” button. | | **PAT004.12:** System shall redirect patient to “Current Appointments” page with the new appointment information added to it. |

| Use Case Name | View Information | |
| --- | --- | --- |
| **Use case ID** | **PAT005** | |
| **Use Case Description** | Patient can view information about the doctor’s practice such as their history, what procedures they do, etc. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT005.1:** Patient shall click on “Information” tab from the patient portal home page. | | **PAT005.2:** System shall display all the doctor’s practice company information. |

| Use Case Name | Pay Fees | |
| --- | --- | --- |
| **Use case ID** | **PAT006** | |
| **Use Case Description** | Patient can view his fee details and balance that he owes to the doctor’s practice. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT006.1:** Patient shall click on “Fees” from the patient portal home page. | | **PAT006.2:** System shall display Fees page with Fee details section with policy on fees, Outstanding fees section with current outstanding balance, and “Transaction History” section with past fees transactions history. |

| Use Case Name | View Reports | |
| --- | --- | --- |
| **Use case ID** | **PAT007** | |
| **Use Case Description** | Patient can view his reports that the doctor/admin has uploaded into the system. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT007.1:** Patient shall click on “Profile” from the patient portal home page. | | **PAT007.2:** System shall display personal details section with first name, last name, address, SSN, license, age, dob,  Weight, height, vitals, Medical Relationships section with Providers, Insurance information, along with “Edit”, “View Reports” and “View History” buttons. |
| **PAT007.3:** Patient shall click on “View Reports”. | | **PAT007.4:** System shall display the various reports. |
| **PAT007.5:** Patient shall click on any specific report. | | **PAT007.6:** System shall display the expanded report. |

| Use Case Name | View History | |
| --- | --- | --- |
| **Use case ID** | **PAT008** | |
| **Use Case Description** | Patient can view his history on - past transactions, appointments, diagnoses, and prescriptions. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT008.1:** Patient shall click on “Profile” from the patient portal home page. | | **PAT008.2:** System shall display personal details section with first name, last name, address, SSN, license, Age, DOB,  Weight, height, vitals, Medical Relationships section with Providers, Insurance information, along with “Edit”, “View Reports” and “View History” buttons. |
| **PAT008.3:** Patient shall click on “View History”. | | **PAT008.4:** System shall display options: Past Transactions, Past Appointments, Past Diagnoses, and Past Prescriptions. |
| **PAT008.5:** Patient shall click on any one of the options. | | **PAT008.6:** System shall bring patient to page with the corresponding past details and history information. |

| Use Case Name | Send Message | |
| --- | --- | --- |
| **Use case ID** | **PAT009** | |
| **Use Case Description** | Patient can send a message to the doctor. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT009.1:** Patient shall click on “Messages” tab from the patient portal home page. | | **PAT009.2:** System shall display “Send Messages” page with Contact Reason, Subject /Enter Message fields, and a “Send” button. |
| **PAT009.3:** Patient shall enter information in any or both the fields and click on “Send” button. | | **PAT009.4:** System shall display success message.  . |

| Use Case Name | Search Symptoms | |
| --- | --- | --- |
| **Use case ID** | **PAT010** | |
| **Use Case Description** | Patient can search for possible solutions to symptoms he or she is experiencing. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT010.1:** Patient shall click on “Search Symptoms” tab from the patient portal home page. | | **PAT010.2:** System shall display the “Search Symptoms” page with a “what symptoms are you experiencing?” text field and a “Search” button. |
| **PAT010.3:** Patient shall enter valid symptoms (that is known to the system) and click on “Search”. | | **PAT010.4:** System shall bring up possible Diagnoses and Solutions for the symptoms. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
| **PAT010.5:** Patient shall enter invalid symptoms (that is unknown to the system) and click on “Search”. | | **PAT010.6:** System shall display error message**.** |

| Use Case Name | Logout | |
| --- | --- | --- |
| **Use case ID** | **PAT011** | |
| **Use Case Description** | Patients can logout of their account. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **PAT011.1:** Patient shall click on logout tab from the patient portal home screen. | | **PAT011.2:** System shall logout of patient account and bring patient back to the login page. |

**Insurance Provider Module**

| Use Case Name | Register Account | | |
| --- | --- | --- | --- |
| **Use case ID** | **INS001** | | |
| **Use Case Description** | Functionality allows insurance provider to create a new account by entering specified details. | | |
| **Flow of events: Happy Path** | | | |
| **Actor** | | | **System** |
| **INS001. 1:**Insurance provider shall launch the MMP application’s insurance provider module by entering the URL in a web browser. | | | **INS001. 2:** System shall display Insurance provider Login page with: Username,  Password, Forgot Username/Password Link, “Sign In” button and “Register” button. |
| **INS001.3:** Insurance provider shall click on “Register” button. | | | **INS001.4:** System shall load registration page with tabs: First Name, Last name, Username, Password, Confirm Password, Office code and a “Save” button.  **Data Validation Rules:**  **First Name, Last Name**: Mandatory can contain only alphabetic characters.  **Username**: Mandatory, unique, minimum length 4 chars, alpha numeric.  **Password**: Mandatory. Minimum length is 8 chars, must contain at least one lowercase letter (a-z)), one uppercase letter (A-Z) and one number (0-9).  **Confirm password**: Mandatory and should match the password field entry. |
| **INS001.5:** Insurance provider shall enter valid values in each field and click on the “Save” button. | | | **INS001.6:** System shall display “Thank you for registering” pop up window. |
| **INS001.7:** Insurance provider shall click on the “OK” button on the pop up window. | | | **INS001.8:** System shall take the Insurance provider back to the login page. |
| **Flow of Events: Alternate Path** | | | |
| **Actor** | | | **System** |
| **Scenario 1** | | | |
| **INS001.9:** Insurance provider shall enter invalid or blank values in each field and click on the “Save” button. | | **INS001.10:** System shall display error message. | |

| Use Case Name | Login Account | | |
| --- | --- | --- | --- |
| **Use case ID** | **INS002** | | |
| **Use Case Description** | Insurance provider can sign into existing account by entering valid credentials. | | |
| **Flow of events: Happy Path** | | | |
| **Actor** | | | **System** |
| **INS002.1:**Insurance provider shall launch the MMP application’s insurance provider module by entering the URL in a web browser. | | | **INS002.2:** System shall display Insurance provider Login page with: Username,  Password, Forgot Username/Password Link, “Sign In” button and “Register” button. |
| **INS002.3:** Insurance provider shall enter valid username and password and click on the “Sign in” button of the Insurance provider’s login functionality.  **Data Validation Rules:**  Same as registration. | | | **INS002.4:** System shall display insurance provider’s portal home page with tabs: Home, Account, Logout to the left and a “Search Patient by First Name” panel in the center, to facilitate search/pull up a patient by his name. |
| **Flow of events: Alternate Path** | | | |
| **Actor** | | | **System** |
|  | | | |
| **INS002.4:** Insurance provider shall enter invalid or blank values in each field and click on the “Sign in” button. | | **INS002.5:** System shall display error message. | |

| Use Case Name | Edit Account | |
| --- | --- | --- |
| **Use case ID** | **INS003** | |
| **Use Case Description** | Insurance provider can change their password. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **INS003.1:** Insurance provider shall click on “Account” tab from the Insurance provider portal home page. | | **INS003.2:** System shall display Username (uneditable), Current Password, New Password, and Confirm Password fields with “Update” button.  **Data validation same as registration.** |
| **INS003.3:** Insurance provider shall enter all valid field values and click on “Update” button. | | **INS003.4:** System shall reload insurance provider’s portal page with success message. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
| **INS003.5:** Insurance provider shall enter all invalid/blank field values and click on “Update” button. | | **INS003.6:** System shall display error message**.** |

| Use Case Name | Update Claim | |
| --- | --- | --- |
| **Use case ID** | **INS004** | |
| **Use Case Description** | Insurance provider can update a claim for a patient by accepting, rejecting, or partly accepting a submitted claim. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **INS004.1:** Insurance provider shall click on a patient from the home screen’s “search patient by first name” feature. | | **INS004.2:** System shall display update claim page with Status dropdown list with ‘Accept’,’ Reject’, ‘PayInPart’ choices, Comment text box, and “Update Claim”, “Cancel” buttons. |
| **INS004.3:** Insurance providers will select/enter all valid values and clicks on “Update Claim” button. | | **INS004.4:** System shall display “updated” message and bring insurance provider back to the insurance provider’s portal home screen. |
| **Flow of Events: Alternate Path** | | |
| **Actor** | | **System** |
| **INS004.3:** Insurance provider shall enter all invalid/blank field values and click on “Cancel” button to reset. | | **INS004.4:** System shall reset and reload the update claim page**.** |

| Use Case Name | Logout | |
| --- | --- | --- |
| **Use case ID** | **INS005** | |
| **Use Case Description** | Insurance providers can logout of their account. | |
| **Flow of events: Happy Path** | | |
| **Actor** | | **System** |
| **INS005.1:** Insurance provider shall click on logout tab from the insurance provider portal home screen. | | **INS005.2:** System shall logout of his account and bring insurance provider to login page. |

