**Issues**

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| # | Description | Assigned To | Status |
| *1* | There are legacy record providers with the same NPI, facility location address, and different practice names. How will these records be structured in MPSE?  Legacy providers structured as above will be combined into a single facility location with multiple services in MPSE. (the multiple services will trigger multiple legacy records, as MMIS has now, but all the legacy records will have the same practice name) |  | Complete |
| *2* | Is it acceptable that a user cannot reopen a closed facility once it is closed "in MMIS"?  Yes, the user can add a new facility location and reuse the address of the closed facility then proceed with adding services, etc. See exception flow: undo close facility location in MMIS. |  | Complete |
| *3* | Allow an existing physical location address to be associated with a new facility location?  Initial answer   * When the "address utility" was removed from scope it was determined that that there was no reason to allow an existing physical address to be associated with a new facility location because physical addresses could not be added prior to adding the facility location. The use case was modified to reflect this decision.   Revised answer   * Upon further analysis the initial decision was revised. To accommodate scenarios such as providers closing a facility location and reopening after restructuring (close and reopening), the requirement is now that existing physical addresses that are not associated with an active facility location can be associated with a new facility location. |  | Complete |
| *4* | Allow the physical address of an existing facility location to be "changed" by selecting a different physical address (select a different physical address, not edit the current address)?  A facility location cannot be "moved". If the facility location is being relocated, the current facility location is closed and a new facility location is created and the services are added. |  | Complete |
| *5* | Allow a physical address to be used as one of the three mailing addresses of a facility location (reimbursement address, 1099 address, and welcome letter)?  No, if this situation were to occur, there will be a duplicate facility location address and mailing address. |  | Complete |
| *6* | When a facility location is closed, what should happen to "related records"? Nothing…   * The records directly related to the closed facility location (services and affiliated individuals) don't need to be ended. The end date for these records can be inferred from the facility location close date. * For the indirectly related facility location records (secondary services, credentials, owners/authorized persons), the rules associated with those records will be invoked in their respective use cases. For example, if a facility location is closed, the rules in the secondary services use case will enforce that the secondary service has an end date on or before the facility location close date. |  | Complete |
| *7* | When a facility location is deleted, what should happen to "related records"?   * The records directly related to the deleted facility location (services and affiliated individuals) are deleted. * For the indirectly related facility location records (secondary services, credentials, owners/authorized persons), the rules associated with those records will be invoked in their respective use cases. For example, if a facility location is deleted, the rules in the secondary services use case will enforce that the secondary service must either be ended or deleted. |  | Complete |
| *8* | Impact of address changes on claims   * Claims processing does not use the facility location address for unconsolidated providers so no impact of changing addresses. * For consolidated providers, claims processing marches the NPI on multiple records, then matches the claims address against the facility location address (zip9 of each address). If no match is found, the claim is rejected.   Decision is that the portal will allow consolidated to change their address because there are not many consolidated providers (about 500), address don't change often, and it is not an issue in the current state. |  | Complete |
| *9* | Why allow closed facility locations to be updated? Because claims need to be submitted after the location is closed and information, such as an address or phone number, may change. |  | Complete |
| *10* | Within MMIS, the EFT vendor number has an effective date associated with it. MPSE does not need an effective date. The effective date will be populated via the MPSE to MMIS interface. |  | Complete |
| *11* | SMEs expressed desire for a facility location to have statuses that help the provider enrollers understand which operations are available (edit, close, undo close, delete, etc.). The concern is that without a status, the provider enrollers will call with questions.  The proposed statuses are:   * Pending (or new) * Active * Closed * Rejected   The use case does not reflect the statuses requirement because:   * Uncertain how to determine rejected status (may be derived, directly set, or both) * Uncertain if any action in this use case will actually set the facility location status, it may be that the approval process or MMIS integration sets the facility location status   These questions will be answered once the service agent review use cases are drafted. |  | Open |

# Description

This use case describes managing the facility locations of a provider profile of an organization.

# Primary actor(s)

User

# Main flow: Create facility location

## Precondition(s)

1. The provider profile is for an organization (profile type is "Organization")

## Steps

1. User invokes option to manage the facility locations of an organization
2. System displays a list of the previously entered facility locations of the organization
3. User invokes option to add a facility location to the organization
4. User enters practice name, phone number, and EFT vendor number
5. User enters the facility location physical address (See UC012\_User\_Manage\_Addresses)
6. System defaults the reimbursement address, 1099 address, and welcome letter address to the facility location physical address
7. If needed, user enters up to two additional facility location mailing addresses and indicates how each is used, as the reimbursement address, 1099 address, and/or welcome letter address (See UC012\_User\_Manage\_Addresses)
8. System validates the facility location – see object model for required attributes and business rules 35, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 159
9. User enters additional information specific to the facility location:
   1. Facility location services – see UC017 User Manage Organization Services
   2. If applicable, Facility location service information – see UC113 User Manage Facility Location Service Information
   3. If applicable, user enters secondary services – see UC112 User Manage Organization Secondary Services
   4. Affiliated individual providers – see UC011 User Manage Affiliated Individual Providers
   5. If applicable, upload PCA agency personnel list – see UC137 User Manage PCA Agency Personnel List
10. System validates – see business rule 44
11. Steps 3 – 10 are repeated for each facility location
12. User finishes entering facility locations
13. System validates that the organization has at least one facility location – see business rule 72
14. Use case ends

## Alternate flow: Select existing physical location address

This flow is only applicable when creating a new facility location. It begins after step 4 of the main flow.

1. User selects a physical address that is not used in any active facility locations
2. Continue with step 6 of the main flow

## Alternate flow: Select facility location mailing addresses

This flow begins after step 6 of the main flow.

1. User selects up to two additional facility location mailing addresses from existing mailing addresses of the application and indicates how each is used, as the reimbursement address, 1099 address, and/or welcome letter address
2. Continue with step 8 of the main flow

## Alternate flow: Update facility location

This flow is applicable to facility locations that are active, closed, inactive, "in MMIS", or not "in MMIS". This flow begins after step 2 of the main flow.

1. User selects a facility location from list and invokes option to update the location
2. User updates the location practice name, phone number, and EFT vendor number
3. User edits the facility location physical address (but cannot select a different physical address) (See UC012\_User\_Manage\_Addresses for adding and editing addresses)
4. User removes/edits/adds and selects different facility location mailing addresses and indicates how each is used, as the reimbursement address, 1099 address, and/or welcome letter address (See UC012\_User\_Manage\_Addresses for adding and editing addresses)
5. Continue with step 8 of the main flow

## Alternate flow: Delete facility location not “in MMIS”

This flow begins after step 2 of the main flow.

1. User selects a facility location and invokes delete option
2. System performs the following:
   1. Verifies the facility location is eligible for deletion – see rule 155
   2. Displays warning message
3. User chooses to continue
4. System deletes the facility location and its facility location services, provider identifiers, service related information, and affiliated individual providers
5. Continue with step 11 of the main flow

## Alternate flow: Close facility location “in MMIS”

This flow begins after step 2 of the main flow.

1. User selects a facility location and invokes close option
2. System verifies the facility location is eligible for closing – see rules 153, 154
3. User enters close date and selects a close reasons – see Termination Reasons.xls where the reason is marked as valid for facility location closing
4. System performs the following:
   1. Validates entered data – see rules 60, 61, 62
   2. Displays warning message
5. Continue with step 11 of main flow

## Alternate flow: Undo close of facility location not closed “in MMIS”

This flow begins after step 2 of the main flow.

1. User selects a facility location and invokes undo close
2. System performs the following:
   1. Verifies the facility location is eligible for undo close – see rules 151, 152
   2. Removes the close date and close reasons
3. Continue with step 4 of the main flow

# Change control

| Version | Date Revised | Revised By | Revisions |
| --- | --- | --- | --- |
| 1 | 1/16/2015 |  | Initial draft |
| 2 | 1/16/2015 | David M | * Removed organization type from facility location because a facility location can have services that span multiple organization types * Refactored Duplicate Facility Location logic so that a physical address can be used in only one facility location (rule 12) * Added statement to clarity that the addresses of a facility location must be for this application only – cannot be from other applications * Fixed rule references and numbers (hopefully) |
| 3 | 1/20/2015 | David M | Additional changes related to removing the organization type:   * Created a combined update flow called "Update facility location", merging the "in MMIS" and not "in MMIS" update flows * Removed business rule 3   Misc. edits to clarify |
| 4 | 1/28/2015 | David M | Refactor use case, business rules, and object model |
| 5 | 1/30/2015 | David M | Corrections to use case:   * User cannot select an existing physical location when adding a facility location to an application – user must enter a new address * System defaults the mailing address to the facility location address * Mailing addresses can only be of type mailing address – cannot select a physical address   Clarifications   * Attempted to clarify that the addresses used for facility locations must be from the "selected" application – user is not allowed to select an address for a facility location from the addresses of a different application |
| 6 | 2/2/2015 | David M | * Clarify duplicate rule – duplicate facility locations have the same address * Added issue regarding inconsistency of the duplicate rule and the flows not allowing user to select an existing physical address |
| 7 | 2/5/2015 | David M | * Added multiple new issues * Added alternate flow allowing user to select an existing physical address * Add some of the logic that occurs when a facility location is deleted, closed, undo close |
| 8 | 2/13/2015 | David M | Refactor for versioning, move rules, add reference to use cases that add additional facility location information |
| 9 | 2/17/2015 | David M | Added reference to rules 98-100 to main flow line that validates additional facility location information |
| 10 | 2/23/2015 | David M | Added reference to UC085\_User\_Manage\_PCPO\_Biller |
| 11 | 4/7/2015 | David M | Removed reference to UC021 waivered services because it was merged into UC017 |
| 12 | 4/8/2015 | David M | * Moved rule 43 (must have at least one service) to UC017 * Added issue #8 to explain why closed facility locations can be edited |
| 13 | 4/13/2015 | David M | * Changed facility location reference from provider profile to organization * Removed view flow * Clarify close language – date and reason are now close date and reason * Added rule 43 |
| 14 | 4/23/2015 | David M | * Added referenced to UC113 * Removed messages from rules * Added notes as to remaining work on close, undo close, and delete |
| 15 | 4/28/2015 | David M | Add EFT vendor number and issue related to EFT vendor effective date |
| 16 | 4/30/2015 | David M | Change flow name from "Undo close facility location not in MMIS" to "Undo close of facility location not closed in MMIS" |
| 17 | 5/4/2015 | David M | * Added rule 159 regarding format of EFT vendor number * Added reference to rule 159 from main flow validation * Added EFT vendor number to update facility location flow * Enhanced description of update facility location flow |
| 18 | 5/11/2015 | David M | * Added warning to close facility flow |
| 19 | 5/14/2015 | David M | * Clarify delete, close, and undo close requirements * Added open issue related to status |
| 20 | 6/29/2015 | David M | Added reference to UC137 PCA agency personnel list |