**Use case name:** Manage Assigned Billers

**Description:** This use case describes managing Assigned Billers.

**Primary actor(s):** User (Provider Enroller, Service Agent, Service Administrator)

**Precondition(s):**

**Main flow:** Create Assigned Biller

This flow is performed for each assigned biller being created.

1. User invokes option to create an assigned biller
2. System displays the following LegacyRecordSearch attributes:
   1. LegacyRecordSearch.umpi
3. User enters attributes and submits
4. System validates required attributes were entered and properly formatted, see: business rules: #1, #4
5. System returns record that matches the active (UMPI) and meets business rules: #3,
6. System displays the following attributes from the assigned billers application for user:
   1. ProviderIdentifier.umpi
   2. OrganizationProvider.legalName
   3. FacilityLocation.phoneNumber
7. System displays the following AssignedBillers attributes for the user to enter:
   1. AssignedBillers.effectiveDate
   2. AssignedBillers.endDate
   3. AssignedBillers.transactionType – from TransactionTypes <<enumeration>>
8. User enters attributes
9. System validates required attributes were entered and properly formatted, see business rules: #6, #7, #8, #9, #10, #11
10. Use case ends

**Alternate flow:** Record not found

1. Starting at step 5 in the main flow
2. System does not find a matching record. See business rule #2
3. Use case ends

**Alternate flow:** View assigned billers

1. User invokes option to view Assigned Billers
2. User selects the Assigned Biller they want to view.
3. System display the AssignedBillers, OrganizationProvider and ProviderIdentifier attributes as read-only.
4. Use case ends

**Alternate flow:** Update assigned billers – **Not “In MMIS”**

This flow is performed when the user selects to edit an assigned biller relationship that is not “in MMIS”

1. User accesses Assigned Billers
2. User searches for the Assigned Biller to update
3. User selects option to update Assigned Biller
4. System verifies that the AssignedBiller.inMMISIndicator is false
5. Continue with Main flow step 7

**Alternate flow:** Update assigned billers – **“In MMIS**”

This flow is performed when the user selects to edit an assigned biller relationship that is in “in MMIS”

1. User selects Assigned Biller to update
2. System verifies that the AssignedBiller.inMMISIndicator is true
3. System displays the following Assigned Biller application attributes:
   1. ProviderIndentifier.umpi – Display as: “submitter ID” – Read only
   2. OrganizationProvider.legalName – Display as: “Assigned Biller Name” – read only
   3. FacilityLocation.phoneNumber – read only
   4. AssignedBiller.effectiveDate – read only
   5. AssignedBiller.endDate
   6. AssignedBiller.transactionType
4. User updates attributes
5. System validates required attributes were entered and properly formatted – see business rules #9, #10, #11.
6. Use Case Ends

**Alternate flow:** Delete assigned billers – **not “In MMIS”**

1. User selects the Assigned Biller to delete
2. User invokes option to delete Assigned Biller
3. System verifies that the AssignedBiller.inMMISIndicator is false
4. System deletes the Assigned Biller
5. Use Case Ends

**Alternate flow:** Delete assigned billers – **“In MMIS”**

1. User selects the Assigned Biller to delete.
2. Delete option not available
3. Use Case Ends

**Business Rules:**

|  |  |
| --- | --- |
| **Rule #** | **Business Rule** |
| 1 | **rule “submitterID is required**”  when   * ProviderIdentifier.umpi “submitter ID” is not entered   then   * Display message “submitter ID is required” |
| 2 | **rule “ AssignedBiller not found**  when   * LegacyRecord is not found   then   * Display message “Submitter ID not found” |
| 3 | **rule “submitterID must be a valid Assigned Biller”**  when   * LegacyRecordSearch.umpi entered is not equal to: EDI Trading Partner (PT28), Clearinghouse (PT95), or Billing Intermediary (TP98)   then   * display message: “Submitter ID must be a valid Assigned Biller” |
| 4 | **rule “submitterID format must be valid”**  when   * LegacyRecordSearch.umpi entered is not a valid format. Must start with an “A” or “M” followed by 9 digits.   then   * Display message “Submitter ID must start with an “A” or “M” |
| 6 | **rule “Effective Date must be greater than 01/01/1900”**  when   * AssignedBiller.effectiveDate is < 01/01/1900   then   * Display message “Effective Date must be 01/01/1900 or greater” |
| 7 | **rule “valid Effective Date”**  when   * AssignedBiller.effectiveDate format is invalid   then   * Display message “Effective Date must be a valid date” |
| 8 | **rule “Effective Date is required”**  when   * The AssignedBiller.effectiveDate is blank   then   * Display message “Effective Date is required” |
| 9 | **rule “Valid End Date”**  when   * The AssignedBiller.endDate is entered, and format is invalid   then   * Display message “End Date must be a valid date” |
| 10 | **rule “End Date must be later then Effective Date”**  when   * The AssignedBiller.endDate is entered, and the date is < AssignedBiller.effectiveDate   then   * Display message “End Date must be later than the Effective Date” |
| 11 | **rule “Transaction Type is required”**  when   * The AssignedBiller.transactionType is left blank   then   * Display message: “Transaction Type is required” |

**Issues:**

**Change control:**

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date Revised | Revised By | Revisions |
|  |  |  |  |