**Backlog**

**Specification**

**PHIL. GROUPER**

**V 1.0  
Web Application**

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## GROUPER-001 – PRE MDC

**Purpose**: It allows users to securely regain access to their accounts by resetting their password. It verifies the user’s email, provides an auto-generated password for login, and offers the option to change the password after logging into the ACR-GB system.

1. Assumptions
   1. The email address is provided by the user in the "Forgot Password" page.
2. Constraint/Limitations
   1. Auto Generated Password
3. During the password reset process, users will receive an auto-generated password.
4. Users can choose to keep this auto-generated password or manually change it after logging in.
5. Business Rules
   1. Valid Email Requirement
6. The email address provided in the “Reset Password” page must follow the standard email format (i.e., it must include an ‘@’ symbol).
7. If the email format is invalid, the system should display an error message prompting the user to provide a properly formatted email.
   1. Existing User Validation
8. The email address must belong to an existing user account in the **ACR-GB system**.
9. If the provided email address is not associated with any user account, the system should display an appropriate error message (e.g., *Email Not Found*).
   1. Email Notification
10. Upon successful validation, an email will be sent to the provided address containing a **new auto-generated password**.
11. This email serves as confirmation that the password reset process has been completed.
    1. Password Usage
12. The user may log in using the auto-generated password received in the email.
13. Once logged in, the user has the option to either keep the auto-generated password or change it to a new password of their choice.
14. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Email Address | If the email address does not match an account in the system, display an error message.  If the provided email matches an account in the system and is active, send the new generated password to the provided email address and display a success message.  If the email address field is blank, display an error message.  If the email is not in a valid format (e.g., missing ‘@’ symbol), display an error message | **Error message**: *Email Not Found.*  **Success message**: *New Password Has Been Sent To Your Email.*  **Error message**: *Please fill out this field.*  **Error message**: *Please include an '@' in the email address.* |

## ACRGB-002 - Log in and Log out

**Purpose**: The login process ensures secure access to the application by requiring an email address, password, and captcha. Upon logging out, all unsaved transactions made by the user will be terminated.

1. Assumptions
   1. The email address and password must match the credentials for the same user account in the system.
   2. The email address must belong to a registered user account in the **ACR-GB application**.
   3. The user account must be logged in to log out.
2. Constraint/Limitations
   1. The user account must have an "Active" status to log in.
3. Business Rules
   1. A user may log in or log out at any time.
4. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Email address  Password  Captcha | **Verify Credentials** Check if the provided email address and password match an existing account in the system.  if email does not exist or does not match any account in the system.  If the captcha is invalid, display an error message.  If any fields are blank, display an error message.  If the email provided is not in a valid format, display an error message.  If all inputs are valid and matches an account in the system, proceed to login. | **Error Message**: *Invalid username or password.*  **Error Message**: *Invalid Captcha.*  **Error Message:** *Please fill out this field.*  **Error Message**: *Please include an ‘@’ in the email address.*  Successful login to the system |
| User action to log out (e.g., clicking the "Logout" button) | All session data and any unsaved transactions are cleared. | The user is exited from the system and returned to the login screen. |
| User action to idle for 30 minutes | Terminates the current session. | The user is exited from the system and returned to the login screen. |

## ACRGB-003 - User Management

**Purpose**: Manage user accounts by creating, viewing, editing, and deactivating them as needed.

1. Assumptions  
   1. System Administrator account is logged in
2. Constraint/Limitations  
   1. Only Admin accounts can create and/or update a user account
3. Business Rules  
   1. Fields for Create User:  
      1. First Name - required field
      2. Middle Name - optional field
      3. Last Name - required field
      4. Email Address - required field
      5. Mobile Number - required field
   2. Create Login Credentials  
      1. Automatically the username is the same as the email address.
      2. Password is auto generated
      3. The following user roles can be assigned by the system administrator
         1. System Administrator
         2. PhilHealth Admin
         3. Regional Office Admin
         4. Managing Board
   3. Assign Designation  
      1. User cannot assign a designation to PhilHealth Admin and System Administrator
      2. User can assign a regional office designation to a regional office admin user
      3. User can assign a network designation to a managing board user
   4. Change User Password
4. Password contains an uppercase letter, lowercase, special character and number.
5. Minimum length of 8 characters
6. Input-Process-Output
7. Create User & Update User Details

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| First Name  Middle Name  Last Name  Email Address  Mobile Number | If any of the required fields are blank, display an error message.  Check if the provided email address is in a valid format (must include an ‘@’ symbol).  If all required fields meet the data requirements, the system creates a new user account and displays a success message. | **Error Message:** *Please fill out this field.*  **Error Message**: *Please include an ‘@’ in the email address.*    **Success Message:** *User created successfully.* |

1. Create Login Credentials

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Username  Password  Role (Selected by the user) | Automatically assigns username same as the user’s email  Auto generates a random password  if no role is selected, display an error message.  If all the required fields are valid and meet data requirements, create the user’s login credentials, display a success message. | Display the username as a read-only field with the user's email.  Display the password as a read-only encrypted value.  **Error Message**: *Please select an item in the list.*  **Success Message:** *Login credentials were successfully created.* |

1. Assign Designation

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Field: Username  Field: Designation | Automatically sets username field value as the selected user’s email  if no designation is selected, display an error message  If the user’s role is Regional Office Admin, the system fetches all regional offices.  If the user’s role is Managing Board, the system fetches all Networks.  If all required fields are valid and meet data requirements, display a success message. | Display the selected user’s username as a read-only field.  **Error Message**: *Please select an item in the list.*.  Regional Offices as options in a select button.  Health care provider networks as options in a select button.  **Success Message:** *Designation assignment successful.* |

1. Change Password

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Field: Password | Validate the password to check if it meets the required criteria (e.g., length, complexity).  If the password does not meet the criteria, display an error message.  If the password field is empty, display an error message.  If the password meets the criteria, display the success message and the save button. | **Error Message**: *Password invalid.*  Display error message:  **Error Message:** *Please fill out this field.*  **Success Message:** *Password valid.* Display the Save Button |

1. Change User Role

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Field: Role | Updates the user’s role  If no role is selected, display an error message.  If the required fields are complete, display a success message | **Error Message:** *Please fill out this field.*  **Success Message:** *User role were successfully updated* |

1. View Activity Logs

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view activity logs of users (e.g., clicking the "Activity Logs" in the sidebar ) | Updates the user’s role  If no role is selected, display an error message.  If the required fields are complete, display a success message | **Error Message:** *Please fill out this field.*  **Success Message:** *User role were successfully updated* |

## ACRGB-004 - Regional Office Management

**Purpose**: Viewing of all regional offices and the networks mapped to each region.

1. Assumptions
   1. PhilHealth Admin is logged into the system.
   2. The user has navigated to the Regional Office module.
2. Constraint/Limitations
   1. Only PhilHealth Admin has permission to view all regional offices and the networks mapped to them.
   2. Regional Offices details are non editable
3. Business Rules
   1. The user can view networks, which are grouped by their corresponding designated Regional Offices.
4. Input-Process-Output  
   1. View Region

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view Regional Offices (e.g., clicking the "Regional Offices" button) | The system fetches all Regional Offices from the database | Display the list of Regional Offices |

* 1. View Networks per Region

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view Networks per Regional Offices (e.g., clicking view networks in the selected Regional Office) | The system fetches all Networks mapped to the selected regional office. | List of Networks mapped to the selected Regional Office. |

## 

## ACRGB-005 - Network Management

**Purpose**: Allows users to **create**, **view**, **edit** network information and manage network access.

1. Assumptions
   1. Regional Office Admin account is logged in.
   2. The user has navigated to the Regional Offices module.
2. Constraint/Limitations
   1. Only accounts with Regional Office Admin privileges can modify network information.
3. Business Rules
   1. Fields for Creating a Network:
      1. HCPN or Network Name - required field
      2. Registration Number - required field
      3. Address - required field
      4. Account Number - required field
      5. Bank Name - required field
      6. Registration Start Date - required field
      7. Registration End Date - required field
   2. Create New Network
4. Registration number is unique.
   1. Update Network Details
5. Details of networks with an active contract are non-editable.
6. Registration numbers of networks with a previous contract record cannot be edited..
7. Registration dates are non editable.  
   1. Add Existing Network
8. Selectable options are networks that do not have a designated regional office.  
   1. Manage Network Access
9. A non-Apex facility can be a member of only one network.
10. The user cannot modify network access if there is an active contract associated with the network.
11. Input-Process-Output
    1. View Networks

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view Health Care Provider Networks (e.g., clicking the "HCPN" button) | The system retrieves all networks associated with the user’s designated regional office. | Displays the list of networks mapped to the user’s designated regional office. |

* 1. Create Network

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Network Name  Registration Number  Address  Account Number  Bank Name  Start Date  End Date | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if the registration number already exists in the system. If existing, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, a new network will be created and automatically assigned to the user’s designated regional office. | **Error Message:** *Please fill out this field.*  **Error Message:** *Unable to create network: Registration number is already in use.*  **Success Message:** *New Health Care Provider Network has been created successfully.* |

* 1. Update Network Details

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Network Name  Registration Number  Address  Account Number  Bank Name | Checks for empty fields. If any field is blank, an error message is displayed.  **( Applicable to networks that has no previous contract record )** Checks if the registration number already exists in the system. If existing, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, a new network will be created and automatically assigned to the user’s designated regional office. | **Error Message:** *Please fill out this field.*  **Error Message:** *Unable to update network: Registration number is already in use.*  **Success Message:** *Health Care Provider Network has been successfully updated.* |

* 1. Add Existing Network

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to add an existing Care Provider Network (e.g., clicking the "Add Existing Network" button). | The system retrieves all networks that are not associated with any regional office. | Displays the list of networks that are not associated with any regional office. |
| User action to select networks (e.g., checking the checkbox for the selected networks).  Confirmation of the user ( | Fetch all the selected networks and displays in a confirmation message.  Maps the selected network to the user’s designated regional office. | Displays the list of selected networks.  **Success Message:** *Networks have been successfully added.* |

* 1. Manage Network Access

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view facilities under a Health Care Provider Network (e.g., clicking the "Manage Network Access" button in the selected network). | The system retrieves all facilities associated with the selected network | Displays the list of facilities mapped to the selected network. |
| User action to add facilities to a network (e.g., by checking the checkbox for the desired facilities to be added). | Maps the selected facilities to the network | **Success Message:** *Facilities have been successfully added.* |
| User action to remove facilities to a network (e.g., by checking the checkbox for the desired facilities to be removed). | Removes the selected facilities to the network | **Success Message:** *Facilities have been successfully removed.* |

## ACRGB-006 - View All Networks & Facilities

**Purpose**: View all networks along with their associated facilities.

1. Assumptions
   1. PhilHealth Admin account is logged in.
2. Constraint/Limitations
   1. PhilHealth Admin has view-only access.
3. Business Rules
   1. Facilities are grouped by networks.
   2. Each facility can belong to only one network.
4. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view all Networks (e.g., by clicking the HCPN button on the sidebar). | The system retrieves all networks. | Displays the list of all networks. |
| User action to view facilities by network(e.g., by clicking the view button on the selected network). | The system retrieves all facilities associated with the selected network.. | Displays the list of all facilities associated with the selected network. |

## ACRGB-007 - APEX Facility Management

**Purpose**: It allows the user to view and manage APEX Facility affiliations.

1. Assumptions
   1. Regional Office Admin is logged in
2. Constraint/Limitations
   1. Only the Regional Office Admin can manage the affiliation of an Apex facility.
3. Business Rules
   1. An Apex Facility can be affiliated with multiple networks.
4. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view all APEX Facilities (e.g., by clicking the APEX Facility button on the sidebar). | The system retrieves all APEX Facilities. | Displays the list of all APEX Facilities. |
| User action to view or manage APEX Facility’s affiliation (e.g., by clicking the Manage Affiliation button on the selected APEX Facility). | The system retrieves all network affiliation of the selected APEX Facility. | Displays all network affiliation of the selected APEX Facility. |
| User action to add an Affiliation(e.g., clicking the "Add Affiliates" button). | The system retrieves all networks that are not affiliated yet with the selected APEX Facility. | Displays the list of all networks that are not affiliated yet with the selected APEX Facility. |
| User action to select networks (e.g., checking the checkbox for the selected networks). | Add the affiliation of the selected networks to the chosen Apex Facility. | **Success Message:** *Network affiliation was successfully added.* |

## ACRGB-008 - GB Utilization : HCPN Contracts

**Purpose**: A system feature that allows viewing, editing, terminating and releasing of tranches of HCPN/Network Contracts.

1. Assumptions
   1. Regional Office Admin is logged in.
   2. The user has navigated to the HCPN Contracts module.
2. Constraint/Limitations
   1. Only Regional Office admin can Create and modify a network contract.
   2. PhilHealth Admin have view-only access on HCPN Contracts.
3. Business Rules
   1. Fields required for contract creation:
4. Reference Number
5. HCPN / Network
6. Contract Period
7. Claims Average
8. Contract Amount
9. Supplementary Budget
10. Average Claims Volume
11. Committed Claims Volume
12. Final Contract Amount  
    1. The user cannot create a contract without computing the average claims volume and amount.
    2. The user cannot create a contract for a network that does not have any mapped facilities.
    3. A network cannot have more than one active contract.
    4. The user cannot modify a network contract if tranches have already been released.
    5. The user can only manage contracts of networks under the user’s designated regional office.
13. Input-Process-Output
14. View and Create New HCPN Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view all active contracts of networks under his/her designated regional office(e.g., by clicking the HCPN Contracts button on the sidebar). | The system retrieves all contracts linked to networks within the user’s assigned regional office. | Displays all contracts linked to networks within the user’s assigned regional office.  A summary of the budget for the user's designated regional office is displayed at the top. |
| User action to initiate contract creation (e.g., clicking the “New HCPN Contract” button). | The system processes the request by redirecting the user to the contract creation page. | Displays the contract creation page with a new contract form. |
| Field : Reference Number  Field : HCPN / Network  Field : Contract Period  (e.g., click the “Compute” button in the contract creation page). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system computes average claims amount, average claims volume, contract amount, and supplementary budget. | **Error Message:** *Please fill out this field.*  Displays the submitted fields and computed values in a read-only state field and displays editable fields for committed claims volume and final contract amount. |
| Field : Committed Claims Volume  Field : Final Contract Amount (e.g., click the “Submit” button in the contract creation page). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system creates a new contract for the selected network. | **Error Message:** *Please fill out this field.*  Redirects to HCPN Contracts page  **Success Message:** *New contract created successfully.* |

1. Edit Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view other details and buttons of a contract (e.g., clicking the “View” button in the selected contract). | The system fetches the other details of the selected contract. | Displays the other details and buttons of the selected contract |
| User action to initiate editing a contract (e.g., clicking the “View” button in the selected contract). | The system retrieves the details of the selected contract and displays them in a modal, populating the input fields with the corresponding predefined values. | Displays the reference number as an editable field, the Health Care Provider Network (HCPN) as a read-only field, an empty field for selecting the contract period, and an editable field for the contract amount. |
| Field : Reference Number  Field : HCPN / Network (read-only)  Field : Contract Period  Field : Contract Amount  (e.g., click the “Update” button in the edit contract modal). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system updates the selected contract and displays a success message.. | **Error Message:** *Please fill out this field.*  **Success Message:** *Contract details were successfully updated.* |

1. Terminate Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to initiate terminating a contract (e.g., clicking the Trash Icon “Terminate Contract” button in the other details of the selected contract). | The system retrieves the details of the selected contract and displays them in a modal, populating the input fields with the corresponding predefined values. | Displays the Health Care Provider Network (HCPN) as a read-only field, reference number as a read-only , and an empty input field for end date and remarks. |
| Field : HCPN / Network (read-only)  Field : Reference Number (read-only)  Field : End Date  Field : Remarks (optional)  (e.g., click the “Terminate” button in the terminate contract modal). | Check if the end date is empty. If empty, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system terminates the contract and displays a success message.. | **Error Message:** *Please fill out this field.*  **Success Message:** *Contract ended successfully.* |

1. View Contract Tranches

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view contract tranches(e.g., clicking the “Tranches” button in the other details of the selected contract). | The system redirects to tranches page and retrieves released tranches of the selected contract | Displays tranches page and the released tranches of the selected contract. |

1. View Facility Contract details associated with a Network Contract.

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view contract facilities(e.g., clicking the “Facilities” button in the other details of the selected contract). | The system redirects to the facility contracts page and retrieves contracts of facilities associated with the selected network contract. | Displays the facility contract page and the contracts of facilities associated with the selected network contract. |
| User action to view tranches of a facility contract(e.g., clicking the “Tranches” button in the other details of the selected facility contract in the Facility Contracts page). | The system redirects to tranches page and retrieves released tranches of the selected contract | Displays tranches page and the released tranches of the selected contract. |

## ACRGB-009 - Release Tranches ( HCPN Contract )

**Purpose**: A system feature where the user can release tranches of a contract

1. Assumptions
   1. Regional Office Admin is logged in
   2. The user has selected a network contract and has navigated to the tranches module.
2. Constraint/Limitations
   1. Only the Regional Office Admin can release tranches for an HCPN Contract.
   2. PhilHealth Admin have view-only access on HCPN Tranches
3. Business Rules
   1. Previous contract details only appear when releasing the first tranche.
   2. First tranche has a fixed value of 60% of the contract amount.
   3. Second tranche has a fixed value of 30% of the contract amount.
   4. Third tranche has a fixed value of 10% of the contract amount.
   5. The user cannot release the second tranche if the first is not released yet.
   6. The user cannot release the third tranche if the second is not released yet.
   7. The user can only release a supplementary budget if the selected contract has reached the committed claims volume.
4. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to release tranches(e.g., clicking the “Release Tranche” button). | The system retrieves the contract amount for the selected network, calculates the tranche amount based on the specified tranche percentage or supplementary percentage, and displays the result in a modal. | Displays the contract amount, tranche amount, and tranche release percentage as read-only fields; the released amount as a read-only field; and empty input fields for receipt number and release date. |
| Field : Contract Amount (read-only)  Field : Tranche (read-only)  Field : Percentage (read-only)  Field : Tranche Amount(read-only)  Field : Released Amount (read-only)  Field : Receipt Number  Field : Released Date  (e.g., click the “Save” button in the edit contract modal). | Check if the end date is empty. If empty, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system records the released tranche and displays a success message. | **Error Message:** *Please fill out this field.*  **Success Message:** *Tranche successfully released.* |

## ACRGB-010 - GB Utilization : APEX Facility Contracts

**Purpose**: A system feature that allows viewing, editing, terminating and releasing of tranches of APEX Facility Contracts.

1. Assumptions
   1. Regional Office Admin is logged in.
   2. The user has navigated to the APEX FacilityContracts module.

II. Constraint/Limitations

* 1. Only Regional Office admin can Create and modify an Apex facility contract.
  2. PhilHealth Admin have view-only access on APEX Facility Contracts.

III. Business Rules

* 1. Fields required for contract creation:

1. Reference Number
2. Apex Facility
3. Contract Period
4. Claims Average
5. Contract Amount
6. Supplementary Budget
7. Average Claims Volume
8. Committed Claims Volume
9. Final Contract Amount  
   1. The user cannot create a contract without computing the average claims volume and amount.
   2. An apex facility cannot have more than one active contract.
   3. The user cannot modify an apex facility contract if tranches have already been released.

IV. Input-Process-Output

1. View and Create New APEX Facility Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view all active contracts of APEX Facilities(e.g., by clicking the “APEX Facility Contracts” button on the sidebar). | The system retrieves all contracts of APEX Facilities. | Displays all contracts of APEX Facilities. |
| User action to initiate contract creation (e.g., clicking the “New Contract” button). | The system processes the request by redirecting the user to the contract creation page. | Displays the contract creation page with a new contract form. |
| Field : Reference Number  Field : APEX Facility  Field : Contract Period  (e.g., click the “Compute” button in the contract creation page). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system computes average claims amount, average claims volume, contract amount, and supplementary budget. | **Error Message:** *Please fill out this field.*  Displays the submitted fields and computed values in a read-only state field and displays editable fields for committed claims volume and final contract amount. |
| Field : Committed Claims Volume  Field : Final Contract Amount (e.g., click the “Submit” button in the contract creation page). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system creates a new contract for the selected network. | **Error Message:** *Please fill out this field.*  Redirects to Apex Facility Contracts page  **Success Message:** *New contract created successfully.* |

1. Edit Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view other details and buttons of a contract (e.g., clicking the “View” button in the selected contract). | The system fetches the other details of the selected contract. | Displays the other details and buttons of the selected contract |
| User action to initiate editing a contract (e.g., clicking the “View” button in the selected contract). | The system retrieves the details of the selected contract and displays them in a modal, populating the input fields with the corresponding predefined values. | Displays the reference number as an editable field, the Apex Facility as a read-only field, an empty field for selecting the contract period, and an editable field for the contract amount. |
| Field : Reference Number  Field : APEX Facility(read-only)  Field : Contract Period  Field : Contract Amount  (e.g., click the “Update” button in the edit contract modal). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system updates the selected contract and displays a success message.. | **Error Message:** *Please fill out this field.*  **Success Message:** *Contract details were successfully updated.* |

1. Terminate Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to initiate terminating a contract (e.g., clicking the Trash Icon “Terminate Contract” button in the other details of the selected contract). | The system retrieves the details of the selected contract and displays them in a modal, populating the input fields with the corresponding predefined values. | Displays the APEX Facility as a read-only field, reference number as a read-only , and an empty input field for end date and remarks. |
| Field : APEX Facility(read-only)  Field : Reference Number (read-only)  Field : End Date  Field : Remarks (optional)  (e.g., click the “Terminate” button in the terminate contract modal). | Check if the end date is empty. If empty, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system terminates the contract and displays a success message.. | **Error Message:** *Please fill out this field.*  **Success Message:** *Contract ended successfully.* |

1. View Contract Tranches

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view contract tranches(e.g., clicking the “Tranches” button in the other details of the selected contract). | The system redirects to tranches page and retrieves released tranches of the selected contract | Displays tranches page and the released tranches of the selected contract. |

## ACRGB-011 - Release Tranches ( APEX Facility Contract )

**Purpose**: A system feature where the user can release tranches of a contract

1. Assumptions
   1. Regional Office Admin is logged in
   2. The user has selected a network contract and has navigated to the tranches module.

II. Constraint/Limitations

* 1. Only the Regional Office Admin can release tranches for an APEX Facility Contract.
  2. PhilHealth Admin have view-only access on APEX Facility Tranches

III. Business Rules

* 1. Previous contract details only appear when releasing the first tranche.
  2. First tranche has a fixed value of 60% of the contract amount.
  3. Second tranche has a fixed value of 30% of the contract amount.
  4. Third tranche has a fixed value of 10% of the contract amount.
  5. The user cannot release the second tranche if the first is not released yet.
  6. The user cannot release the third tranche if the second is not released yet.
  7. The user can only release a supplementary budget if the selected contract has reached the committed claims volume.

IV. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to release tranches(e.g., clicking the “Release Tranche” button). | The system retrieves the contract amount for the selected network, calculates the tranche amount based on the specified tranche percentage or supplementary percentage, and displays the result in a modal. | Displays the contract amount, tranche amount, and tranche release percentage as read-only fields; the released amount as a read-only field; and empty input fields for receipt number and release date. |
| Field : Contract Amount (read-only)  Field : Tranche (read-only)  Field : Percentage (read-only)  Field : Tranche Amount(read-only)  Field : Released Amount (read-only)  Field : Receipt Number  Field : Released Date  (e.g., click the “Save” button in the edit contract modal). | Check if the end date is empty. If empty, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system records the released tranche and displays a success message. | **Error Message:** *Please fill out this field.*  **Success Message:** *Tranche successfully released.* |

## ACRGB-012 - GB Utilization : Facility Contracts

**Purpose**: A system feature that allows viewing, editing, terminating and releasing of tranches of Facility Contracts.

1. Assumptions
   1. The Managing Board user is logged in.
   2. The user has navigated to the Facility Contracts module.

II. Constraint/Limitations

* 1. Only the Managing Board user can Create and modify a facility contract.
  2. PhilHealth Admin and Regional Office Admin have view-only access on facility Contracts.

III. Business Rules

* 1. Fields required for contract creation:

1. Reference Number
2. Facility
3. Contract Period
4. Claims Average
5. Contract Amount
6. Supplementary Budget
7. Average Claims Volume
8. Committed Claims Volume
9. Final Contract Amount  
   1. The user cannot create a contract without computing the average claims volume and amount.
   2. A facility cannot have more than one active contract.
   3. The user cannot modify a facility contract if tranches have already been released.

IV. Input-Process-Output

1. View and Create New Facility Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view all active contracts of Facilities(e.g., by clicking the “Facility Contracts” button on the sidebar). | The system retrieves all contracts of Facilities. | Displays all contracts of Facilities. |
| User action to initiate contract creation (e.g., clicking the “New Contract” button). | The system processes the request by redirecting the user to the contract creation page. | Displays the contract creation page with a new contract form. |
| Field : Reference Number  Field : Facility  Field : Contract Period  (e.g., click the “Compute” button in the contract creation page). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system computes average claims amount, average claims volume, contract amount, and supplementary budget. | **Error Message:** *Please fill out this field.*  Displays the submitted fields and computed values in a read-only state field and displays editable fields for committed claims volume and final contract amount. |
| Field : Committed Claims Volume  Field : Final Contract Amount (e.g., click the “Submit” button in the contract creation page). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system creates a new contract for the selected network. | **Error Message:** *Please fill out this field.*  Redirects to Facility Contracts page  **Success Message:** *New contract created successfully.* |

1. Edit Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view other details and buttons of a contract (e.g., clicking the “View” button in the selected contract). | The system fetches the other details of the selected contract. | Displays the other details and buttons of the selected contract |
| User action to initiate editing a contract (e.g., clicking the “View” button in the selected contract). | The system retrieves the details of the selected contract and displays them in a modal, populating the input fields with the corresponding predefined values. | Displays the reference number as an editable field, the Facility as a read-only field, an empty field for selecting the contract period, and an editable field for the contract amount. |
| Field : Reference Number  Field : Facility(read-only)  Field : Contract Period  Field : Contract Amount  (e.g., click the “Update” button in the edit contract modal). | Checks for empty fields. If any field is blank, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system updates the selected contract and displays a success message.. | **Error Message:** *Please fill out this field.*  **Success Message:** *Contract details were successfully updated.* |

1. Terminate Contract

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to initiate terminating a contract (e.g., clicking the Trash Icon “Terminate Contract” button in the other details of the selected contract). | The system retrieves the details of the selected contract and displays them in a modal, populating the input fields with the corresponding predefined values. | Displays the Facility as a read-only field, reference number as a read-only , and an empty input field for end date and remarks. |
| Field : Facility(read-only)  Field : Reference Number (read-only)  Field : End Date  Field : Remarks (optional)  (e.g., click the “Terminate” button in the terminate contract modal). | Check if the end date is empty. If empty, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system terminates the contract and displays a success message.. | **Error Message:** *Please fill out this field.*  **Success Message:** *Contract ended successfully.* |

1. View Contract Tranches

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to view contract tranches(e.g., clicking the “Tranches” button in the other details of the selected contract). | The system redirects to tranches page and retrieves released tranches of the selected contract | Displays tranches page and the released tranches of the selected contract. |

## ACRGB-013 - Release Tranches ( Facility Contract )

**Purpose**: A system feature where the user can release tranches of a contract

1. Assumptions
   1. Managing Board is logged in
   2. The user has selected a facility contract and has navigated to the tranches module.

II. Constraint/Limitations

* 1. Only the Managing Board can release tranches for a Facility Contract.
  2. PhilHealth Admin have view-only access on Facility Tranches.

III. Business Rules

* 1. Previous contract details only appear when releasing the first tranche.
  2. First tranche has a fixed value of 60% of the contract amount.
  3. Second tranche has a fixed value of 30% of the contract amount.
  4. Third tranche has a fixed value of 10% of the contract amount.
  5. The user cannot release the second tranche if the first is not released yet.
  6. The user cannot release the third tranche if the second is not released yet.
  7. The user can only release a supplementary budget if the selected contract has reached the committed claims volume.

IV. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to release tranches(e.g., clicking the “Release Tranche” button). | The system retrieves the contract amount for the selected network, calculates the tranche amount based on the specified tranche percentage or supplementary percentage, and displays the result in a modal. | Displays the contract amount, tranche amount, and tranche release percentage as read-only fields; the released amount as a read-only field; and empty input fields for receipt number and release date. |
| Field : Contract Amount (read-only)  Field : Tranche (read-only)  Field : Percentage (read-only)  Field : Tranche Amount(read-only)  Field : Released Amount (read-only)  Field : Receipt Number  Field : Released Date  (e.g., click the “Save” button in the edit contract modal). | Check if the end date is empty. If empty, an error message is displayed.  Checks if all required fields meet the data requirements. If valid, the system records the released tranche and displays a success message. | **Error Message:** *Please fill out this field.*  **Success Message:** *Tranche successfully released.* |

## ACRGB-014 - Reports : GB Computation

**Purpose**: A system feature that allows users to compute the global budget for each network or facility.

1. Assumptions
   1. User Account is logged in
   2. The user has navigated to the GB Computation module.
2. Constraint/Limitations
   1. Global budget computations are not stored within the system but can be exported.
3. Business Rules
   1. Global budget computations are based on claims data from the three years preceding the selected contract period.
   2. Claims data from 2019, 2020, and 2021 are excluded from the global budget computations and are not factored into calculations for those periods.
4. Input-Process-Output
   1. Generate Computation

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Type | Fetches all apex facilities if the type selected is apex facility.  Fetches all networks if selected type is HCPN | Displays apex facilities as options in a select button.  Displays networks as options in a select button. |
| Field: APEX Facility  Field: Date From  Field: Date To | Computes global budget based on the selected date range. | Displays a detailed and a summarized computation |
| Field: HCPN  Field: Facilities  Field: Date From  Field: Date To | Computes global budget based on the selected date range. | Displays a detailed and a summarized computation |

* 1. Export Claims

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| User action to download all details of the computed global budget (e.g., clicking the download icon “Export to Excel” button). | Fetches all details of the computed global budget. | Excel file containing downloaded details of the computed global budget. |
| User action to print all details of the computed global budget (e.g., clicking the “Print” button). | Fetches all details of the computed global budget and initiates the browser's default print dialog. | Print preview of the global budget details. |

## ACRGB-015 - Reports : Subsidiary Ledger

**Purpose**: A system feature that allows users to generate a ledger for each contract.

I. Assumptions

* 1. User Account is logged in
  2. The user has navigated to the Subsidiary Ledger module.

II. Constraint/Limitations

* 1. The user can only generate a ledger one at a time.
  2. The user can only generate a ledger for an active contract

III. Business Rules

* 1. Claims/Liquidations are grouped per diagnosis.

IV. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Type | Fetches all apex facilities if the type selected is apex facility.  Fetches all networks if selected type is HCPN | Displays apex facilities as options in a select button.  Displays networks as options in a select button. |
| Field: APEX Facility  Field: Contract Period | The system calculates and compiles data for the ledger based on the released tranches and claims within the selected contract period. | Display the generated ledger, detailing all tranches and claims associated with the selected contract period. |
| Field: HCPN  Field: Contract Period | The system calculates and compiles data for the ledger based on the released tranches and claims within the selected contract period. | Display the generated ledger, detailing all tranches and claims associated with the selected contract period. |
| User selects a filter option: Daily, Monthly, or Summary. | Daily filter: The system groups liquidation data by day and facility.  Monthly filter: The system groups liquidation data by month and facility.  Summary filter: The system groups liquidation data by month, regardless of facility. | If Daily is selected, display liquidations grouped per day and per facility.  If Monthly is selected, display liquidations grouped per month and per facility.  If Summary is selected, display liquidations grouped per month, regardless of facility. |
| User action to download ledger(e.g., clicking the download icon “Export to excel”). | The system retrieves all data in the generated ledger associated with the selected contract period and prepares it for export. | Excel file with the downloaded ledger data for the specified contract period. |
| User action to print all details of the generated ledger (e.g., clicking the “Print” button). | Fetches all details of the generated ledger and initiates the browser's default print dialog. | Print preview of the ledger details. |

## ACRGB-016 - Reports : Booking

**Purpose**: A system feature that enables users to generate a ledger for contracts that have been officially recorded or booked.

1. Assumptions
   1. Regional Office Admin user Account is logged in
   2. The user has navigated to the Booking module.

II. Constraint/Limitations

* 1. The user can only book one contract at a time.
  2. If the selected ended contract is a network contract and the facilities under that network do not have inactive contracts with the same contract period as the network, no claims will be generated.

III. Business Rules

* 1. Claims/Liquidations are grouped per diagnosis.
  2. Only contracts that have been booked will appear as options in the contract selection.
  3. Only ended contracts will appear as options in the contract selection.

IV. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Type | Fetches all apex facilities if the type selected is apex facility.  Fetches all networks if selected type is HCPN | Displays apex facilities as options in a select button.  Displays networks as options in a select button. |
| Field: APEX Facility/HCPN  Field: Contract Period | The system retrieves all claims data related to the chosen contract period and selected APEX facility/HCPN and displays it in preview mode | Displays a preview of all claims data associated with the selected network/facility and specified contract period. |
| User action to download claims(e.g., clicking the download icon “Export to excel”). | The system compiles all claim data associated with the selected parameters and prepares it for export. | Excel file containing the downloaded claims data. |
| User action to book the generated claims (e.g., clicking the “Lock Data” button). | The system creates a non-editable copy of the generated claims and displays a success message. | **Success Message:** *Data was successfully booked.* |

## ACRGB-017 - Reports : Reconciliation

**Purpose**: A system feature that enables users to generate a ledger for contracts that have been officially recorded or booked.

1. Assumptions
   1. User Account is logged in
   2. The user has navigated to the Reconciliation module.

II. Constraint/Limitations

* 1. The user can only generate a ledger one at a time.

III. Business Rules

* 1. Claims/Liquidations are grouped per diagnosis.
  2. Only contracts that have been booked will appear as options in the contract selection.

IV. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Type | Fetches all apex facilities if the type selected is apex facility.  Fetches all networks if selected type is HCPN | Displays apex facilities as options in a select button.  Displays networks as options in a select button. |
| Field: APEX Facility  Field: Contract Period | The system calculates and compiles data for the ledger based on the released tranches and claims within the selected contract period. | Display the generated ledger, detailing all tranches and claims associated with the selected contract period. |
| Field: HCPN  Field: Contract Period | The system calculates and compiles data for the ledger based on the released tranches and claims within the selected contract period. | Display the generated ledger, detailing all tranches and claims associated with the selected contract period. |
| User selects a filter option: Daily, Monthly, or Summary. | Daily filter: The system groups liquidation data by day and facility.  Monthly filter: The system groups liquidation data by month and facility.  Summary filter: The system groups liquidation data by month, regardless of facility. | If Daily is selected, display liquidations grouped per day and per facility.  If Monthly is selected, display liquidations grouped per month and per facility.  If Summary is selected, display liquidations grouped per month, regardless of facility. |
| User action to download ledger(e.g., clicking the download icon “Export to excel”). | The system retrieves all data in the generated ledger associated with the selected contract period and prepares it for export. | Excel file with the downloaded ledger data for the specified contract period. |
| User action to download ledger(e.g., clicking the download icon “Export to excel”). | The system retrieves all data in the generated ledger associated with the selected contract period and prepares it for export. | Excel file with the downloaded ledger data for the specified contract period. |
| User action to print all details of the generated ledger (e.g., clicking the “Print” button). | Fetches all details of the generated ledger and initiates the browser's default print dialog. | Print preview of the ledger details. |

## ACRGB-018 - Account Settings

**Purpose**: A system feature that allows the user to change his/her email, mobile number and password.

1. Assumptions
2. User Account is logged in
3. The user has navigated to the Account Settings module.

II. Constraint/Limitations

1. The user cannot change his/her name.

III. Business Rules

1. Password must meet the required complexity

IV. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Field: Email  Field: Mobile Number | If any of the required fields are blank, display an error message.  Check if the provided email address is in a valid format (must include an ‘@’ symbol).  If all required fields meet the data requirements, the system updates the user’s email and mobile number. | **Error Message:** *Please fill out this field.*  **Error Message**: *Please include an ‘@’ in the email address.*    **Success Message:** *User created successfully.* |
| Field: Password  Click Save Button | Validate the password to check if it meets the required criteria (e.g., length, complexity).  If the password does not meet the criteria, display an error message.  If the password field is empty, display an error message.  If the password meets the criteria, display the success message and the save button.  The system saves the new password and terminates the current session. | **Error Message**: *Password invalid.*  Display error message:  **Error Message:** *Please fill out this field.*  **Success Message:** *Password valid.* Display the Save Button  **Login Page with message**: *Session Expired* |

## ACRGB-019 - CF5 Viewer

**Purpose**: A system feature that allows the user to view the CF5 Data of the submitted claims.  
 I. Assumptions

1. Regional Office Admin Account is logged in
2. The user has navigated to the CF5 module.

II. Constraint/Limitations

1. The user can only view one CF5 Data at a time

III. Business Rules

1. Claim series number must be existing in the submitted claims

IV. Input-Process-Output

|  |  |  |
| --- | --- | --- |
| **INPUT** | **PROCESS** | **OUTPUT** |
| Field: Claim Series | System checks if the claim series is existing in submitted claims  If Existing and has CF5 data  If not existing | **Success:** Displays the CF5 Data of the selected claim series.  **Error Message**: *No Data Found* |

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