Notes

**Home Page** –

1. Registration Form add Address/City/State/Zip to the form

**Attorney & Case Manager Pages**

Application Forms:

1. Mesh and General Surgery forms:
2. Change Name to Two Sections:
3. First Name
4. Last Name
5. Change “Next ” button to “Next Page”
6. When you click “Next” the Page Freezes for more than 10 seconds, it must transaction smoothly.
7. Auto Fill Attorney or Case Manager Information in the correct blocks
8. Remove Medical Bills as a required Document. The Document to Show are “Product Label” and “Medical Records”
9. Add “Signed Medical Release Form”
10. Create a PDF Medical Release form that can be printed and Signed and then Uploaded
11. Ortho, Pain Management and Neurological Forms:
12. Change “Name” to Two Sections:
13. First Name
14. Last Name
15. Add Calendar to Date Field
16. Drivers License Field will only accept Characters, it needs to accept letters and numbers
17. Address Field will only accept Characters, it needs to accept letters and numbers
18. Change “Next” button to “next Page”
19. When you click “submit” to move from the 1st to the 2nd page, the Page Freezes for more than 10 seconds, it must transaction smoothly.
20. Auto fill Attorney or Case Manager information in the correct blocks
21. Change “Submit” on the 1st page of the application to “Next Page”
22. When I type in an address for the Attorney the following message pops up: Warning: No message defined for frm\_address
23. Defendant Infomation Insurance ( information is neededwhether or not in suit) Separate the words “needed whether”
24. Change Product Label to “Police Report”

**Cases**

1. **See Mock Up on Attached Page “Cases”**
2. **The Goal if this page is to make it easy for the Attorney or Case Worker to see what is messing.**
3. **Add a ledger as shown in Document what Documents are required, see attached page “Cases”**

**Upload Documents**

1. **See Mock Up of changes on Attached pages: “Upload Documents (2)”**

**Monitor Status – appears to work for the time being. We may think about combining this page with “Cases”.**

**Admin Panel:**

**Manage Users:**

**Validate Users – This needs to move under “Manage Professionals” as a part of the approval process for new Vendors, i.e. Doctors, Attorney, Case Managers, Etc.**

**New Clients – This needs to bring up a directory of new clients, and when you click on the client you see a page that shows a list of what documents have been received. This page can look like the “Cases” page attached. At the bottom of the page will be a “Next Page” button, when you click this it will take you to the page to assign the Doctor or underwriter. A mock-up of this page is attached as “Accept New Client Draft”. On Tuesday we will work to start installing the emails that go with this page.**

**Search Clients – This will allow an Administrator to search new clients see all documents that have been uploaded, and all notes associated with the case. The Administrator will be able to add a special rate case here. The Administrator needs a way to uploads new documents to the file and notes to the file, as well as change underwriters. If the Administrator changes an underwriter, the only party to be notified is the new underwriter, the Doctor, Attorney or Case Manager is not to receive a notification.**

**Manage Professionals: - These pages are where the Administrator will accept the New Vendor and Assign what emails will be received by this person. You will have multiple people working within a company that are receiving emails about a case. The Doctor may receive all emails about a case where his scheduler should only receive emails that concern scheduling the appoints for a client. The billing department will only receive emails about the bill, the same is true of a Law Firm, you may have an Attorney, his paralegal, his assistant, that are receiving emails about a client, the attorney may want all of the emails about a certain client going to his paralegal, we need to design this. Please see the mock-up page “Example of Registration” to see what I am talking about.**

**Change the Heading in the Admin Panel “Cases” to “Reports” We will work on Reports Next Week, and we have the information flow and email structure built.**

**We need a New Messages Menu section for all levels, When an Attorney or a Case Manager Log in they will see a list of new messages, then Clients Who are missing Documents, and then Status Changes.**

**When a Doctor logs in they will see new messages, New Clients, and Todays Appointments, this is the same for Medical Facilities and Anesthesiologist.**

**When an Underwriter logs in they will see New Messages, then New Clients, then Clients missing Docs, Clients who have changed Status, and clients with Special Rate Flags. The Underwriter will need to be able to Search Clients, and it will bring up the page showing the client documents that are available, and missing, as will as the Application, and the Medical Records release form**

**Everything on these pages Must be Completed and working by the End of the Day on Tuesday 10/28/2014**

**I will be online at 10:00am my time on Monday to answer Questions.**