

iConnect 190009 Design Approach

Project Overview

Add a new CRM that queries data from National Provider Identifier Standard for all health care providers.

The National Provider Identifier Standard is a database of Covered health care providers and all health plans and health care clearinghouses must use the NPIs in the administrative and financial transactions adopted under HIPAA. This will allow the lookup of providers (Doctors, PA's, etc.) inside firelight. This database is updated weekly. URL: <https://www.cms.gov/Regulations-and-Guidance/Administrative-Simplification/NationalProvIdentStand/>

Features/Requirements

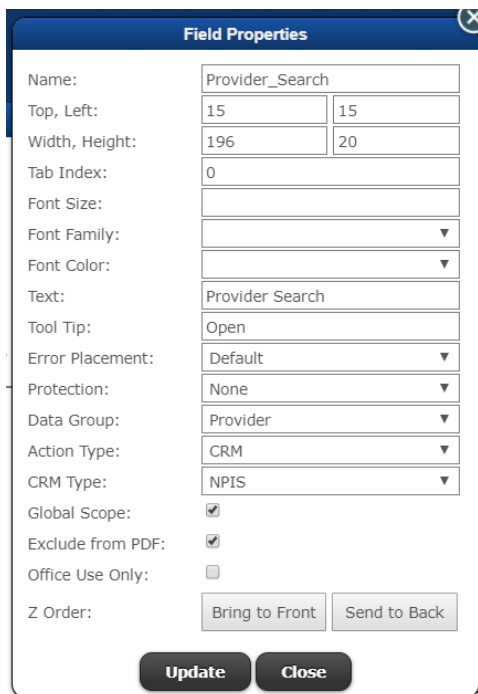
- Host database in Firelight.
- Utilize CRM to access data.

Use Cases / Workflow Changes

Add a custom action button type of CRM with NPIS to utilize the National Provider Identifier Database.

Admin Changes

1. Add new CRM Type, label NPIS.
2. Add new Data Group for fields to be populated from the CRM. Added Provider and Provider 2.



The screenshot shows the 'Field Properties' dialog box for a field named 'Provider_Search'. The dialog has a blue header with a close button. The properties are as follows:

Name:	Provider_Search	
Top, Left:	15	15
Width, Height:	196	20
Tab Index:	0	
Font Size:		
Font Family:	▼	
Font Color:	▼	
Text:	Provider Search	
Tool Tip:	Open	
Error Placement:	▼	
Protection:	▼	
Data Group:	▼	
Action Type:	▼	
CRM Type:	▼	
Global Scope:	<input checked="" type="checkbox"/>	
Exclude from PDF:	<input checked="" type="checkbox"/>	
Office Use Only:	<input type="checkbox"/>	
Z Order:	Bring to Front Send to Back	

At the bottom of the dialog are two buttons: 'Update' and 'Close'.

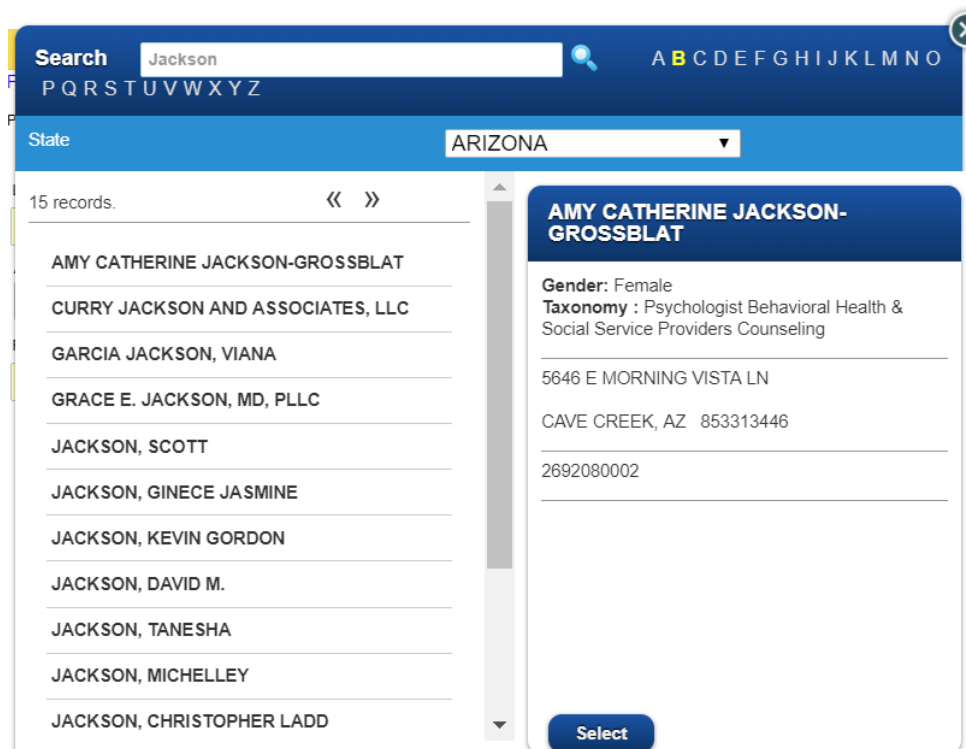
3. The Provider Data Group Property mappings on the forms and wizards are:

- FirstName
- MiddleName
- LastName
- BusinessName
- Occupation
- Gender
- Address Line1, Line2
- City
- State
- Zipcode
- PhoneNumber

App Changes

1. Add new NPIS CRM using the existing CRM dialog.
2. Alphabet: this search is a 'starts with' search. The sort is alphabetical and is based on the selected alpha letter, the state and the provider Last Name and Business Name.
3. Search: this search is a 'contains' search and is based on the text typed in search box, the state and the Provider Last Name and Business Name. Note that the selected alpha letter is not included in this search.

UI Mock Ups



The mock up shows a search interface with a blue header. The 'Search' field contains 'Jackson' and a magnifying glass icon. Below it is an alphabet bar with 'A B C D E F G H I J K L M N O' and 'P Q R S T U V W X Y Z'. The 'State' dropdown is set to 'ARIZONA'. Below the header, it says '15 records.' and shows a list of providers. The first provider, 'AMY CATHERINE JACKSON-GROSSBLAT', is highlighted. To the right of the list, a detailed view for this provider is shown, including her gender, taxonomy, address, city, state, zip code, and phone number. A 'Select' button is at the bottom of the detailed view.

Provider Name	Gender	Taxonomy	Address	City	State	Zipcode	Phone Number
AMY CATHERINE JACKSON-GROSSBLAT	Female	Psychologist Behavioral Health & Social Service Providers Counseling	5646 E MORNING VISTA LN	CAVE CREEK, AZ	853313446	2692080002	
CURRY JACKSON AND ASSOCIATES, LLC							
GARCIA JACKSON, VIANA							
GRACE E. JACKSON, MD, PLLC							
JACKSON, SCOTT							
JACKSON, GINECE JASMINE							
JACKSON, KEVIN GORDON							
JACKSON, DAVID M.							
JACKSON, TANESHA							
JACKSON, MICHELLEY							
JACKSON, CHRISTOPHER LADD							

How to Enable and Use This Feature

Add a custom action button to your form or wizard.

Set the CRM Type to NPIS and the Data Group to Provider.

Add the corresponding provider fields and set the Data Group to Provider and the Data Group Property on each field accordingly. The example below is for the business name of the provider.

Field Properties

Name:

Provider_BusinessName

Top, Left:

26

305

Width, Height:

392

20

Tab Index:

0

Font Size:

Font Family:

Font Color:

Text Alignment:

Background:

Input Type:

Max Length:

Soft Limit:

Tool Tip:

Error Placement:

Default

Protection:

None

Mask:

None

SSN Format:

None

Data Group:

Provider

Data Group Property:

BusinessName

Global Scope:

☒

Multi Line:

☐

Exclude from PDF:

☐

Read Only:

☐

Office Use Only:

☐

Is Password:

☐

Z Order:

Bring to Front

Send to Back

Update

Close

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- Form and Wizard Library	x	
- Design Forms, Wizards	x	
- Profile Administration		
- Reports		
- Deployment		
FireLight App		
- New Application		
- Edit Application	x	
- Signature Process		
- Review Queue		
- Manual Review		
- User Preferences		
- Inbound Integration		
- Outbound Integration		
- PDF Generation		
- Email System		
FireLight Console		
- Windows		
- iOS		
Other Systems		
- DTCC Integration		
- Commission Netting		
- Activity Reporting		