

DPT Application Requirements Specification v1.1

Revision History

Version (x.y)	Date of Revision	Description of Change	Reason for Change	Affected Sections	Approved By
1.0	13 th Mar 2024	Initial Draft	Not Applicable	Not Applicable	
1.1	25 th Mar 2024	Client's feedback as per M17	Review feedback	All	Neela Rath

Approval History

Version (x.y)	Prepared By/Date	Reviewed By/Date	Approved By/Date
1.0	Yugi/25 th Mar 2024	Neela Rath/25 th Mar 2024	Neela Rath/25 th Mar 2024

Table of Contents

1.	Introduction	5
1.1	Purpose	5
1.2	Product Scope	5
1.3	Definitions and Acronyms	5
2.	Overall Description.....	5
2.1	User Needs.....	5
2.2	Assumptions and Dependencies	6
3.	System Features & Functional Requirements.....	6
3.1	Practices	6
3.1.1	Add Practice	6
3.1.2	Practices List.....	6
3.1.3	View Practice.....	6
3.1.4	Inactive Option for Practices.....	7
3.1.5	Bulk Practice Upload	7
3.1.6	Export to Excel	9
3.1.7	Create Transaction.....	9
3.1.8	Add Location	9
3.1.9	Locations	9
3.1.10	View Location.....	10
3.1.11	Export to Excel – Locations	10
3.1.12	Location History Log.....	10
3.1.13	Inactive Option for Locations.....	11
3.1.14	Add Provider	11
3.1.15	Providers	11
3.1.16	View Provider	11
3.1.17	Providers Export.....	12
3.1.18	Provider History Log.....	12
3.1.19	Inactive Option for Providers.....	12
3.1.20	Add Patient	13

3.1.21	Patients	13
3.1.22	Bulk Patient Upload	13
3.1.23	View Patient	15
3.1.24	Patients Export	16
3.1.25	Patient History Log	16
3.1.26	Inactive Option for Patients	16
3.1.27	Add Drug	17
3.1.28	Drugs List	17
3.1.29	Bulk Drug Upload	17
3.1.30	View Drug	21
3.1.31	Drugs Export	21
3.1.32	Drug List Filters	21
3.1.33	Drug History Log	22
3.1.34	Inactive Option for Drug	22
3.1.35	Practice History Log	23
3.1.36	Add Protocol	23
3.1.37	Protocols List	23
3.1.38	Edit Protocol	24
3.1.39	Inactive Option for Protocol	24
3.1.40	Add Protocol Mapping	24
3.1.41	Protocol Mapping List	25
3.1.42	Edit Protocol Mapping	25
3.1.43	Delete Protocol Mapping	26
3.2	Patients	26
3.3	Procedure Codes	26
3.3.1	Add Procedure Code	26
3.3.2	Procedure Codes List	26
3.3.3	Bulk Procedure Code upload	27
3.3.4	Edit Procedure Code	28
3.3.5	Procedure Codes Export	28
3.3.6	Procedure Code History Log	28

3.3.7	Inactive Option for Procedure Codes.....	29
3.4	Transactions	29
3.4.1	Create Transaction	29
3.4.2	Search Function.....	30
3.4.3	Buy & Bill Section	30
3.4.4	Pharmacy Section.....	30
3.4.5	Transaction Status.....	31
3.4.6	Transactions List.....	31
3.4.7	Transactions Export to Excel	31
3.4.8	Transactions History Log	31
3.4.9	Update Transaction.....	32
3.4.10	Delete Transaction	33
3.4.11	Transactions Search Filters	33
3.4.12	Download Detailed Report and Summary Report	34
3.4.13	Final Recommendation	35
3.5	Users and Roles	35
3.5.1	Users List	35
3.5.2	Practice, Manager and Role Assignment	36
3.5.3	Inactive user	36
3.5.4	Add Role	36
3.5.5	Roles List	37
3.5.6	Edit Role	37
3.5.7	Inactive Role.....	37
3.6	Dashboard.....	37
3.7	Reports	38
3.7.1	Auto Emailed Reports	38
3.7.2	Manual Reports.....	38
3.8	Notifications.....	39
4.	Nonfunctional Requirements.....	39

1. Introduction

1.1 Purpose

The purpose of the Drug Preference Tool or Application is for an Executive to Add Patients, Practices, Drug Information into the Application and then use the tool to search for the Drug Preferences based on the Patient Medical Condition and other details. Application will produce the recommended drug options with prices and other details like Rebate, Pay preference etc. Lastly, the recommended drug options are sent to the practice team offline who will select the final option. The final option or the approved drug is entered into the system and a report is generated.

1.2 Product Scope

The goal of the application is to provide an interface for the users to import drug information, practices, patients into the system and then use the tool to search for the drug recommendations based on the patient's medical condition and other details.

1.3 Definitions and Acronyms

- a) Practice – It's a function of clinicians which prescribe medication.
- b) DPT – Drug Preference Tool.
- c) DOS – Date of Service.

2. Overall Description

2.1 User Needs

One of the user types of this application are executives who manage the practices. Executives will be assigned a few practices each and they will further address the patients inside each practice. For each patient in a practice, the drug recommendations are searched, and an approved drug is updated with a closure comment.

2.2 Assumptions and Dependencies

Address Validation – In the current version of the application, as per client's suggestion, system will not be validating any address fields i.e., fields like Physical Address or Billing Address. User can enter any required value in the address fields. We are going with the client's assumption that their PM System does this validation and user will only put valid addresses during bulk upload or manual entry in the application.

3. System Features & Functional Requirements

3.1 Practices

3.1.1 Add Practice

In the Practices module, user will have a button Add Practice. Clicking on this should redirect user to a Practice creation form. Fields List spreadsheet has all the fields that are applicable for creating a Practice including the mandatory and other validations. After filling all the fields, user can click on Save to save a Practice. Clicking on Cancel will navigate user back to the Practices List page.

3.1.2 Practices List

After a Practice is saved, it will be added to the Practices List. Practices List will have the columns that are mentioned in the Practices List wireframe. Each Practice record in the table will have View Practice, Create Transaction, Inactive options in the context menu.

3.1.3 View Practice

To view a Practice user can click on View Practice option in the context menu against the Practice record in the list. This action will navigate user to a View Practice page. This page will have Practice name as the header and all the Practice

fields in the read only format. User can only view the information. At the bottom of the page, user will have Edit and Back buttons. Back action will take user back to the Practices List. Clicking on Edit should make the same page editable, and the buttons will turn into Save and cancel to save any changes done by the user.

On the view practice page, user should have a list of tabs for various functions like Providers, Locations, Patients, Drug List, Practice History Log, Protocol List, Protocol Mapping. Each of these tabs will be explained in detailed further in this document.

3.1.4 Inactive Option for Practices

User can mark a Practice as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Practice status to Inactive. Practices that are inactive will not show up for Selection across the application.

3.1.5 Bulk Practice Upload

A practice can be created in the system either in bulk by uploading a list of practices information via an Excel (using a standard template) or user can create a practice one by one through the application as mentioned above using Add Practice Option. Bulk Practices upload template has been prepared and agreed with the client. User can click on Bulk Practice Upload button from the Practices List page for uploading the Practices in bulk. This action will navigate user to a new page.

User can download the bulk upload template by clicking on the Download Practices Template button. After downloading the template, user can fill any number of records in the spreadsheet ensuring the mandatory fields that are marked in red are filled. User can upload the spreadsheet into the application using the Upload file option. User can locate the file from the local machine and click on Upload. To cancel the file selection, user can click on Cancel. To go back to the Practices list, user can click on back button. The upload action will display the valid Practices data in a table for user preview.

User can preview the data in the table and if the data is as expected, user can click on Submit button, which will clear the table and will add the practice records into the application. If the data has any errors and user wants to discard the upload, user can click on Discard Upload button which should clear the table and discard the upload. If there are any errors for any of the uploaded records, the Download Error Report should be enabled, and user should be able download the Error report. In the last column of the error report, the relevant error message should be displayed, for which the format has been agreed with the client. All the records that have errors should be ignored for the upload.

Using the bulk upload template, User can create Practices, Locations, Providers. Practice is a Parent record and Location, Provider, Patient are child records. In order to create a Location, Provider, Patient, there must be a Practice in the system.

Practice creation has 3 sections in terms of the Fields. Basic Practice information is the first section. Location is the second section, and the Provider information is the third section. NPI field in the Basic Practice section is unique and it needs to be considered as unique reference to identify a Practice. Likewise, NPI in the Location section is unique for a Location. And Provider NPI is unique for a Provider. The parent record i.e., Practice can repeat in multiple rows in the upload. In other words, a practice can have multiple Locations or Multiple Providers linked to it.

For Practices, as per the client, we should not update the record when user uploads the data in the second attempt. In other words, once a Practice record (Including Location record and Provider record) is created in the system, the only way for user to update the fields that are relevant, is from the application and it will be one by one. For bulk import, if user attempts to change or update the values for practice, provider or location, system will ignore it and will add a comment in the Error column that's in the Error report which can be downloaded by the user as mentioned above.

We need an alert notification on the screen after clicking on submit (or approving the uploaded data for insertion into the database) that says the number of records is inserted and the number of records that are errored out. The alert should say the following. "80/100 records have been entered into the application" where 80 are

successful records and 20 are error records. All the records that are duplicates or already in the system, those should be considered in the count of 80 i.e., in the successfully inserted count.

3.1.6 Export to Excel

User can download Practices data in excel format from the application. There is a button Export to Excel above the Practices List, which should achieve this function. Export to Excel function will only download the data or the columns that is in the table by ignoring the pagination i.e., the entire records in the table should be downloaded.

3.1.7 Create Transaction

User can create a transaction from the Practices List. Only the create option has been provided here to meet the compliance requirements. User can create any number of transactions for a Practice. Once the create transaction is create, user will be navigated to a new page where user can create a transaction. Further details about creating a transaction are mentioned in the Transactions module.

3.1.8 Add Location

On the Locations list screen, user will have a button Add Location. Clicking on this should redirect to a Location creation form. Fields List spreadsheet has all the fields that are applicable for creating a Location including the mandatory and other validations. After filling all the fields, user can click on Save to save a Location. Clicking on Cancel will navigate user back to the Locations List page. User must create a Practice to add a Location as this option is only available when the user clicks on view Practice.

3.1.9 Locations

After a Location is saved, it will be added to the Locations List. Locations List will have the columns that are mentioned in the Locations List wireframe. Each

Location record in the table will have View Location, Inactive options in the context menu.

3.1.10 View Location

To view a Location user can click on View Location option in the context menu against the Location record in the list. This action will navigate user to a View Location page. This page will have Practice name as the header and all the Location fields in the read only format. User can only view the information. At the bottom of the page, user will have Edit and Back buttons. Back action will take user back to the Locations List. Clicking on Edit will make the same page editable, and the buttons will turn into Save and cancel to save any changes done by the user.

3.1.11 Export to Excel – Locations

User can export Locations data in excel format from the application. There is a button Export to Excel above the Locations List, which should achieve this function. Export to Excel function will only download the data or the columns that is in the table by ignoring the pagination i.e., the entire records in the table should be downloaded.

3.1.12 Location History Log

Once a Location has been created and saved within the system. Any changes or modifications to the location information needs to be tracked and logged in a history view. This is applicable when user modifies each individual record as user cannot modify Location information in bulk. This screen should be called as History Log. This will be a table view with the columns Timestamp, Field Name, Action (Add, Update, Delete), From, To, Username.

Field Name should have the name of the field that has been modified. From and to will have the values that are existing and new respectively. Action will have update when a field is modified, it will have Add when a non-mandatory field has been filled and it will have Delete when a non-mandatory field value has been removed. Username will have the username of the user who has made the respective modification. Timestamp will log the timestamp of the action.

History Log is applicable only after the record is created. User can navigate to History Log from the View Location page by clicking on the History Log button. From the History Log, clicking on the back button should redirect user back to the view Location page.

3.1.13 Inactive Option for Locations

User can mark a Location as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Location status to Inactive. Locations that are inactive will not show up for Selection across the application.

3.1.14 Add Provider

On the Providers list screen, user will have a button Add Provider. Clicking on this should redirect to a Provider creation form. Fields List spreadsheet has all the fields that are applicable for creating a Provider including the mandatory and other validations. After filling all the fields, user can click on Save to save a Provider. Clicking on Cancel will navigate user back to the Providers List page. User must create a Practice to add a Provider as this option is only available when the user clicks on view Practice.

3.1.15 Providers

After a Provider is saved, it will be added to the Providers List. Providers List will have the columns that are mentioned in the Providers List wireframe. Each Provider record in the table will have View Provider, Inactive options in the context menu.

3.1.16 View Provider

To view a Provider user can click on View Provider option in the context menu against the Provider record in the list. This action will navigate user to a View Provider page. This page will have Practice name as the header and all the Provider fields in the read only format. User can only view the information. At the bottom

of the page, user will have Edit and Back buttons. Back action will take user back to the Providers List. Clicking on Edit will make the same page editable, and the buttons will turn into Save and cancel to save any changes done by the user.

3.1.17 Providers Export

User can export Providers data in excel format from the application. There is a button Export to Excel above the Providers List, which should achieve this function. Export to Excel function will only download the data or the columns that is in the table by ignoring the pagination i.e., the entire records in the table should be downloaded.

3.1.18 Provider History Log

Once a Provider has been created and saved within the system. Any changes or modifications to the provider information needs to be tracked and logged in a history view. This is applicable when user modifies each individual record as user cannot modify Location information in bulk. This screen should be called as History Log. This will be a table view with the columns Timestamp, Field Name, Action (Add, Update, Delete), From, To, Username.

Field Name should have the name of the field that has been modified. From and to will have the values that are existing and new respectively. Action will have update when a field is modified, it will have Add when a non-mandatory field has been filled and it will have Delete when a non-mandatory field value has been removed. Username will have the username of the user who has made the respective modification. Timestamp will log the timestamp of the action.

History Log is applicable only after the record is created. User can navigate to History Log from the View Provider page by clicking on the History Log button. From the History Log, clicking on the back button should redirect user back to the view Provider page.

3.1.19 Inactive Option for Providers

User can mark a Provider as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Provider status to Inactive. Providers that are inactive will not show up for Selection across the application.

3.1.20 Add Patient

On the Patients list screen, user will have a button Add Patient. Clicking on this should redirect to a Patient creation form. Fields List spreadsheet has all the fields that are applicable for creating a Patient including the mandatory and other validations. After filling all the fields, user can click on Save to save a Patient. Clicking on Cancel will navigate user back to the Patients List page. User must create a Practice to add a Patient as this option is only available when the user clicks on view Practice.

In the patient creation form, there are two fields called Patient assistance program and BI investigation. Both these are dropdown fields. When user selects Yes as an option for these two fields, the following 2 fields show up on the screen i.e., patient assistance program name and BI Investigation remarks respectively. These two conditional fields are mandatory, and user must enter the values in them when the selected option for the primary fields is Yes. In the bulk import, system should validate this. In case of No and Blank, system will ignore the conditional fields/columns. However, in case of Yes, system must check for the values and if they are not available, the insertion should be ignored, and an error should be logged in the error report.

3.1.21 Patients

After a Patient is saved, it will be added to the Patients List. Patients List will have the columns that are mentioned in the Patients List wireframe. Each Patient record in the table will have View Patient, Inactive options in the context menu.

3.1.22 Bulk Patient Upload

A Patient can be created in the system either in bulk by uploading a list of patients information via an Excel (using a standard template) or user can create a Patient

one by one through the application as mentioned above using Add Patient Option. Bulk Patients upload template has been prepared and agreed with the client. User can click on Bulk Patient Upload button from the Patients List page for uploading the Patients in bulk. This action will navigate user to a new page.

User can download the bulk upload template by clicking on the Download Patients Template button. After downloading the template, user can fill any number of records in the spreadsheet ensuring the mandatory fields that are marked in red are filled. User can upload the spreadsheet into the application using the Upload file option. User can locate the file from the local machine and click on Upload. To cancel the file selection, user can click on Cancel. To go back to the Patients list, user can click on back button. The upload action will display the valid Patients data in a table for user preview.

User can preview the data in the table and if the data is as expected, user can click on Submit button, which will clear the table and will add the patients records into the application. If the data has any errors and user wants to discard the upload, user can click on Discard Upload button which should clear the table and discard the upload. If there are any errors for any of the uploaded records, the Download Error Report should be enabled, and user should be able download the Error report. In the last column of the error report, the relevant error message should be displayed, for which the format has been agreed with the client. All the records that have errors should be ignored for the upload.

Using the bulk upload template, User can create Patients in bulk and to do this there must be a Practice in the system.

We need an alert notification on the screen after clicking on submit (or approving the uploaded data for insertion into the database) that says the number of records is inserted and the number of records that are errored out. The alert should say the following. "80/100 records have been entered into the application" where 80 are successful records and 20 are error records. All the records that are duplicates or already in the system, those should be considered in the count of 80 i.e., in the successfully inserted count.

For Patients, we should update the existing values with the new values if user changes or updates in bulk upload after the first attempt. In other words, if user has created a patient in the system via bulk upload or from the application, if user then provides the same record via bulk upload by altering some of the field values, system will consider the latest values and will update the data in the system. To Identify a unique patient record, we can use a combination of Account# and DOB fields in the patient fields. In other words, more than one patient cannot have the same Account# and DOB in the system within a Practice. System should allow creating a duplicate Patient in a different Practice, but not in the same Practice.

Location validation from Bulk Patient upload – The location value that user enters in the bulk upload for a Patient should be validated with the Location name under practices. 2 validations should be applied here i.e., Location name should be in the system already and this Location value should be under the Practice which user has entered in the file. Example: If user has entered a Practice name as Apollo Hospitals and Location Name as Chennai, then system should validate that there is a Location with the name Chennai in the application under the Practice Apollo Hospitals. For the manual creation from the application, User will first select a Practice from the Dropdown, based on this selection, system will show relevant Locations in the locations dropdown. The same exact validation is also applicable for the field Rendering Provider (which needs to be mapped with Provider Name from Practice). The value entered in the Rendering Provider should be in our system as Provider Name under the relevant Practice.

User must have access to a respective practice to bulk upload patients in it. Example: If user has access to only 3 Practices and if user is trying to create a patient for a 4th Practice (for which the user doesn't have access) using the bulk import option, system should not allow it and add an error message in the error report.

3.1.23 View Patient

To view a Patient user can click on View Patient option in the context menu against the Patient record in the list. This action will navigate user to a View Patient page. This page will have Practice name as the header and all the Patient fields in the read only format. User can only view the information. At the bottom of the page, user

will have Edit and Back buttons. Back action will take user back to the Patients List. Clicking on Edit will make the same page editable, and the buttons will turn into Save and cancel to save any changes done by the user.

3.1.24 Patients Export

User can export Patients data in excel format from the application. There is a button Export to Excel above the Patients List, which should achieve this function. Export to Excel function will only download the data or the columns that is in the table by ignoring the pagination i.e., the entire records in the table should be downloaded.

3.1.25 Patient History Log

Once a Patient has been created and saved within the system. Any changes or modifications to the patient information needs to be tracked and logged in a history view. This is applicable when user modifies each individual record or in bulk. This screen should be called as History Log. This will be a table view with the columns Timestamp, Field Name, Action (Add, Update, Delete), From, To, Username.

Field Name should have the name of the field that has been modified. From and to will have the values that are existing and new respectively. Action will have update when a field is modified, it will have Add when a non-mandatory field has been filled and it will have Delete when a non-mandatory field value has been removed. Username will have the username of the user who has made the respective modification. Timestamp will log the timestamp of the action.

History Log is applicable only after the record is created. User can navigate to History Log from the View Patient page by clicking on the History Log button. From the History Log, clicking on the back button should redirect user back to the view Patient page.

3.1.26 Inactive Option for Patients

User can mark a Patient as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Patient status to

Inactive. Patients that are inactive will not show up for Selection across the application.

3.1.27 Add Drug

On the Drugs list screen, user will have a button Add Drug. Clicking on this should redirect user to a Drug creation form. Fields List has all the fields that are applicable for creating a Drug including the mandatory validations and rules.

After filling all the fields, user can click on Save to save a Drug. Clicking on Cancel will navigate user back to the Drugs List page. User must create a Practice to add a Drug as this option is only available when the user clicks on view Practice.

3.1.28 Drugs List

After a Drug is saved, it will be added to the Drugs List. Drugs List will have the columns that are mentioned in the Drugs List wireframe. Each Drug record in the table will have View Drug, Inactive options in the context menu.

3.1.29 Bulk Drug Upload

A Drug can be created in the system either in bulk by uploading a list of Drug information via an Excel (using a standard template) or user can create a drug one by one through the application as mentioned above using Add Drug Option. Bulk Drug upload templates have been prepared and agreed with the client. User can click on Bulk Drug Upload button from the Drugs List page for uploading the Drugs in bulk. This action will navigate user to a new page.

Client has shared 6 excel formats for importing drug codes in bulk into the system. The six templates are Drug condition report, Drug Cost with ASP & Rebate report, Insurance wise reimbursement report, Practice Preference report, Payer Preference report, Finalized Drug Preference report.

As per the client, user should be able to download all the templates from the application for uploading the drug list in bulk. Therefore, we should display an Input Template dropdown with all the options in it. Depending on the option selected,

system should allow the user to download the relevant template. The names mentioned above should be displayed in the dropdown.

These template formats are different as they come from different departments. Although essentially the drug codes in all the files are the same, the information related to each drug code is partly being shared by each department. System should be able to read and process these 6 different formats.

Once all the drug codes and the relevant information for each drug code is in the application by using all 5 excel templates, then system will be able to generate the complete information for each drug as per the Finalized Drug Preference report template. This report has a few columns that are auto generated by the application based on the formulas given in the Excel template shared by the client.

User should be able to download this Finalized Drug Preference report from the application. Likewise, a user should be able to upload Finalized Drug Preference report into the application to directly insert all the drug codes instead of using the 5 templates mentioned above. This is because the Finalized Drug Preference report is in other words a consolidation report of all the other 5 templates along with a few fields that are formulated.

Drug code is the unique identifier for each record from the excel and based on this an entry should be created in the database or in the application. When an excel is uploaded, system should create the number of records based on the drug code. When the rest of the excels are uploaded into the system, then system should avoid creating duplicates based on the drug code and update the required fields from the rest of the excel files. For example: When user uploads Drug condition report which has Medical Condition, Drug List, Units columns, system will create the number of records based on the drug code and for each record system will have fields condition, drug code, units value. When Drug Cost with ASP & Rebate report is uploaded, system will read the file and will update the fields Drug cost, ASP+4.3%, Estimated Rebate, Estimated Rebate% for the same records that are already in the database from earlier upload. The same process is applicable for all the templates.

After downloading the template from the system, user can fill any number of records in the spreadsheet ensuring the mandatory fields that are marked in red are filled. User can upload the spreadsheet into the application using the Upload file option. User can locate the file from the local machine and click on Upload. To cancel the file selection, user can click on Cancel. To go back to the Drugs list, user can click on back button. The upload action will display the valid Drugs data in a table for user preview.

User can preview the data in the table and if the data is as expected, user can click on Submit button, which will clear the table and will add the Drug records into the application. If the data has any errors and user wants to discard the upload, user can click on Discard Upload button which should clear the table and discard the upload. If there are any errors for any of the uploaded records, the Download Error Report should be enabled, and user should be able download the Error report. In the last column of the error report, the relevant error message should be displayed, for which the format has been agreed with the client. All the records that have errors should be ignored for the upload.

We need an alert notification on the screen after clicking on submit (or approving the uploaded data for insertion into the database) that says the number of records is inserted and the number of records that are errored out. The alert should say the following. “80/100 records have been entered into the application” where 80 are successful records and 20 are error records. All the records that are duplicates or already in the system, those should be considered in the count of 80 i.e., in the successfully inserted count.

All the bulk drug upload templates will have the drug data protocol wise i.e., Medicare, Humana, BCBS etc., and each protocol is a separate tab in excel. Since system needs to know which tabs to read, we should maintain a Protocol list in the system, which is explained in Protocol List section below. Based on the Protocol list, system will read all the excel tabs that are matching with the protocol list.

For Drug codes, we should update the existing values with the new values if user changes or updates in bulk upload after the first attempt. In other words, if user has created a drug code in the system via bulk upload or from the application, if

user then provides the same record via bulk upload by altering some of the field values, system will consider the latest values and will update the data in the system. To Identify a unique drug code record, we can use Drug Code. System should allow creating a duplicate Drug code in a different Practice, Protocol, Year and Quarter combination, but not in the same Practice, Protocol, Year and Quarter combination.

In the input Drug bulk upload files, a few values maybe highlighted in red by the user before uploading. When user downloads the drug information in excel either from drugs list or through transaction reports, such values should be highlighted in red color in the downloaded excel reports. Therefore, during the upload, system should be able to tag such records and follow the same format during the information download.

After a drug is entered either manually or bulk upload, based on the drug data there are a few cost fields that are automatically calculated based on the formula. In such values, which ever are negative values, we need to highlight in red color to indicate the loss. This is in general applicable to all the auto generated values using formulas. In the excel reports and in the application, the respective values should be highlighted in red. The format is to show the price value in braces in red font.

In the samples shared by the client, medical condition name has been mentioned once in excel for the relevant drug list by doing a merge and center in excel. While this works for manual reading, it could be an issue for the system to read and identify the medical condition name for the drug records for which medical condition name column is blank. It has been agreed with the client that the technical team will check the possibility of mapping the medical condition name correctly even when the name is unavailable in the respective row. If it is not possible to address, the client will be informed, and it will be explicitly agreed with the client that the user must enter the medical condition name for every row in the bulk upload.

For bulk upload and manual creation from the application, there are 3 mandatory fields i.e., Medical Condition, Drug Code and Drug Name. For bulk upload, drug code should be validated against the procedure codes master list. User must enter medical condition name, drug code and drug name. The rest of the fields are

optional. If these 3 fields are not entered, those records should be added into error log.

3.1.30 View Drug

To view a Drug user can click on View Drug option in the context menu against the Drug record in the list. This action will navigate user to a View Drug page. This page will have Practice name as the header and all the Drug fields in the read only format. User can only view the information. At the bottom of the page, user will have Edit and Back buttons. Back action will take user back to the Drugs List. Clicking on Edit will make the same page editable, and the buttons will turn into Save and cancel to save any changes done by the user.

3.1.31 Drugs Export

User can export Drugs data in excel format from the application. There is a button Export to Excel above the Drugs List, which should achieve this function. Export to Excel function will only download the data or the columns that is in the table by ignoring the pagination i.e., the entire records in the table should be downloaded. This will follow the excel format of Finalized Drug Preference Report.

3.1.32 Drug List Filters

The drugs list by default will display the data of the current year and the current quarter and even the Protocol should be defaulted to Medicare. For this, we need to add the Medicare Protocol in the protocol list from the backend and make it as default option. User can override the filters for different Protocols, Years and Quarters. This will update the grid accordingly.

For the current year, system can take the current year and for the current Quarter we need to maintain a simple mapping table in the database. In the mapping table, Q1 can be mapped to months Jan to Mar, Q2 should be mapped to months Apr to Jun, Q3 to months July to September, Q4 to October to December. Based on this mapping, system can default to the relevant Quarter option based on the current month. This approach is applicable across the application wherever year and

quarter auto selection are required. For example: Year should default to 2024 and Quarter should default to Q1 if user is looking at the data on 12th Mar 2024.

3.1.33 Drug History Log

Once a Drug has been created and saved within the system. Any changes or modifications to the drug information needs to be tracked and logged in a history view. This is applicable when user modifies in bulk or for each individual record. This screen can be called as Drug History Log. User should be able to navigate to this from the Drug List page.

This will be a grid view with the columns Timestamp, Drug Code, Protocol, Field Name, Action (Add, Update, Delete), From, To, Username. Field Name should have the name of the field that has been modified. From and to will have the values that are existing and new respectively. Action will have update when a field is modified, it will have Add when a non-mandatory field has been filled and it will have Delete when a non-mandatory field value has been removed. Username will have the username of the user who has made the respective modification. Timestamp will log the timestamp of the action. Drug Code and Protocol will be of the drug record that has been modified.

History Log is applicable only after the record is created. By default, the history log will be displayed for the current year and current quarter allowing user to modify the filter if required.

3.1.34 Inactive Option for Drug

User can mark a Drug as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Drug code status to Inactive. Drug Codes that are inactive will not show up for Selection across the application.

3.1.35 Practice History Log

Once a Practice has been created and saved within the system. Any changes or modifications to the practice information needs to be tracked and logged in a history view. This is applicable when user modifies in bulk or for each individual record. This screen can be called as History Log. This will be a grid view with the columns Timestamp, Field Name, Action (Add, Update, Delete), From, To, Username.

Field Name should have the name of the field that has been modified. From and to will have the values that are existing and new respectively. Action will have update when a field is modified, it will have Add when a non-mandatory field has been filled and it will have Delete when a non-mandatory field value has been removed. Username will have the username of the user who has made the respective modification. Timestamp will log the timestamp of the action.

History Log is applicable only after the record is created.

3.1.36 Add Protocol

On the Protocols list screen, user will have a button Add Protocol. Clicking on this should redirect to a Protocol creation form. Wireframe has all the fields that are applicable for creating a Protocol including the mandatory validations. After filling all the fields, user can click on Save to save a Protocol. Clicking on Cancel will navigate user back to the Protocols List page. User must create a Practice to add a Protocol as this option is only available when the user clicks on view Practice. Every protocol will have a Year and Quarter and user cannot repeat the Protocol name for the same Year and Quarter.

3.1.37 Protocols List

After a Protocol is saved, it will be added to the Protocols List. Protocols List will have the columns that are mentioned in the Protocols List wireframe. Each Protocol record in the table will have Edit Protocol, Inactive options in the context menu.

The Protocol list under each practice should be used to validate the tab names from the Drug list excel uploads and the data in the mapped tabs should be read and added into the system with the validations mentioned in the drug bulk upload section above.

3.1.38 Edit Protocol

To edit a Protocol user can click on Edit Protocol option in the context menu against the Protocol in the list. This action will navigate user to an Edit Protocol page and this page is editable. Save button should save any changes done by the user and cancel button should redirect user back to the Protocol list page.

3.1.39 Inactive Option for Protocol

User can mark a Protocol as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Protocol status to Inactive. Protocols that are inactive will not show up for Selection across the application.

3.1.40 Add Protocol Mapping

On the Protocol Mapping list screen, user will have a button Add Protocol Mapping. Clicking on this should redirect user to a Protocol Mapping screen. Wireframe has all the fields that are applicable for Adding a Protocol Mapping including the mandatory validations. Year and Quarter should be defaulted to the current year and the current quarter.

Protocol dropdown will have all the Protocols that are added in the Protocol list. If a Protocol is used for mapping for a Year and Quarter, it should not be displayed again in the dropdown for the same Year and Quarter for a new mapping. If user has to add new payers to it, user must use edit option. Payers list is populated with the distinct list of Primary Insurance Name for all the patients within a Practice. Each patient within a practice will have a Primary Insurance name and this need to be displayed in the Payers dropdown. If two patients have the same Primary Insurance Name, it will be displayed only once. Once a Payer is mapped to a Protocol for a Year and Quarter, it should not be displayed again in the Payers list

for the same Year and Quarter for a new mapping. In other words, one Payer cannot be mapped to multiple Protocols.

In an event where user updates the primary insurance name of a Patient, then the payer needs to be mapped to Protocol only if the new Payer is not already mapped to a Protocol. For example, for a Patient Matt, if the Insurance initially is Care and it has been mapped to Humana, then let's say User has updated the Primary Insurance Name from Care to ICICI (which is not in the existing Payer list and wasn't mapped already), then it needs mapping i.e., User must map the new Insurance name ICICI to the respective Protocol. Second Example – If there are two Patients Bob and Peter and their insurances are Care, HDFC respectively which are already mapped to Humana. Then if Peter's insurance is updated from HDFC to Care, this needs no mapping again as system already knows that the Protocol for Care Insurance is Humana.

After filling all the fields, user can click on Save to save a Protocol Mapping. Clicking on Cancel will navigate user back to the Protocols List page. User must create a Practice to add a Protocol as this option is only available when the user clicks on view Practice.

3.1.41 Protocol Mapping List

After a Protocol mapping is saved, it will be added to the Protocol mapping List. Protocol mapping List will have the columns that are mentioned in the Protocols List wireframe. Each Protocol mapping record in the table will have Edit, Delete options in the context menu. In the Payers list, the count should be displayed as a hyperlink that is the count of the Payers mapped. Clicking on the count should open a pop-up window with the list of the Payers as per the wireframe.

3.1.42 Edit Protocol Mapping

To edit a Protocol mapping user can click on Edit option in the context menu against the Protocol mapping in the list. This action will navigate user to an Edit Protocol mapping page and this page is editable. Save button should save any changes done

by the user and cancel button should redirect user back to the Protocol mapping list page.

3.1.43 Delete Protocol Mapping

User can delete a Protocol mapping using the delete option. Clicking on this will show an alert to the user with a confirm action, which will delete the Protocol mapping. Once a mapping is deleted, all the respective payers should be mapped again for the respective year and quarter.

3.2 Patients

Patients list is the list of all the patients in the application from all the Practices. This list is usually for an Admin or Super admin, but user can provide the permissions as required. This list page is same as patients default page from the Practices module with the same context menu options.

3.3 Procedure Codes

3.3.1 Add Procedure Code

On the Procedure Codes list screen, user will have a button Add Procedure Code. Clicking on this should redirect to a Add Procedure Code form. Fields List spreadsheet has all the fields that are applicable for creating a Procedure Code including the mandatory and other validations. After filling all the fields, user can click on Save to save a Procedure Code. Clicking on Cancel will navigate user back to the Procedure Codes List page. Procedure Code or HCPCS code should be unique in the same Year and Quarter combination. In other words, same HCPCS code cannot repeat in the same Year and Quarter combination.

3.3.2 Procedure Codes List

After a Procedure Code is saved, it will be added to the Procedure Codes List. Procedure Codes List will have the columns that are mentioned in the Procedure Codes List wireframe. Each Procedure Code record in the table will have Edit Procedure Code, Inactive options in the context menu. Procedure Code List is

filtered by default with the current year and current quarter. User can modify the filters as required and the list will be updated.

3.3.3 Bulk Procedure Code upload

A Procedure code can be added in the system either in bulk by uploading a list of procedure codes information via an Excel (using a standard template) or user can create a Procedure Code one by one through the application as mentioned above using Add Procedure Code Option. Bulk Procedure code upload template has been prepared and agreed with the client. User can click on Bulk Procedure Code Upload button from the Procedure Codes List page for uploading the Procedure codes in bulk. This action will navigate user to a new page.

User must select the Year and Quarter for the bulk upload. These fields are defaulted to the current year and current quarter and user can override. User can download the bulk upload template by clicking on the Download Template button. After downloading the template, user can fill any number of records in the spreadsheet ensuring the mandatory fields that are marked in red are filled. User can upload the spreadsheet into the application using the Upload file option. User can locate the file from the local machine and click on Upload. To cancel the file selection, user can click on Cancel. To go back to the Procedure Codes list, user can click on back button. The upload action will display the valid Procedure codes data in a table for user preview.

User can preview the data in the table and if the data is as expected, user can click on Submit button, which will clear the table and will add the procedure codes records into the application. If the data has any errors and user wants to discard the upload, user can click on Discard Upload button which should clear the table and discard the upload. If there are any errors for any of the uploaded records, the Download Error Report should be enabled, and user should be able download the Error report. In the last column of the error report, the relevant error message should be displayed, for which the format has been agreed with the client. All the records that have errors should be ignored for the upload.

We need an alert notification on the screen after clicking on submit (or approving the uploaded data for insertion into the database) that says the number of records is inserted and the number of records that are errored out. The alert should say the following. “80/100 records have been entered into the application” where 80 are successful records and 20 are error records. All the records that are duplicates or already in the system, those should be considered in the count of 80 i.e., in the successfully inserted count.

For Procedure codes, we should update the existing values with the new values if user changes or updates in bulk upload after the first attempt. In other words, if user has created a procedure code in the system via bulk upload or from the application, if user then provides the same record via bulk upload by altering some of the field values, system will consider the latest values and will update the data in the system. To Identify a unique procedure code record, we can use HCPCS Code. System should allow creating a duplicate Procedure code in a different Year and Quarter, but not in the same Year and Quarter combination.

3.3.4 Edit Procedure Code

To edit a Procedure code user can click on Edit Procedure Code option in the context menu against the Procedure Code in the list. This action will navigate user to an Edit Procedure Code page and this page is editable. Save button should save any changes done by the user and cancel button should redirect user back to the procedure codes list page.

3.3.5 Procedure Codes Export

User can export Procedure Codes data in excel format from the application. There is a button Export to Excel above the Procedure codes List, which should achieve this function. Export to Excel function will only download the data or the columns that is in the table by ignoring the pagination i.e., the entire records in the table should be downloaded.

3.3.6 Procedure Code History Log

Once a Procedure Code has been created and saved within the system, any changes or modifications to the procedure code information needs to be tracked and logged in a history view. This is applicable when user modifies in bulk or for each individual record. This screen can be called as Procedure Code History Log. User should be able to navigate to this from the Procedure Code List page.

This will be a grid view with the columns Timestamp, HCPCS Code, Field Name, Action (Add, Update, Delete), From, To, Username. Field Name should have the name of the field that has been modified. From and to will have the values that are existing and new respectively. Action will have update when a field is modified, it will have Add when a non-mandatory field has been filled and it will have Delete when a non-mandatory field value has been removed. Username will have the username of the user who has made the respective modification. Timestamp will log the timestamp of the action. HCPCS Code will be of the record that has been modified.

History Log is applicable only after the record is created. By default, the history log will be displayed for the current year and current quarter allowing user to modify the filter if required.

3.3.7 Inactive Option for Procedure Codes

User can mark a Procedure code as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Procedure Code status to Inactive. Procedure codes that are inactive will not show up for Selection across the application.

3.4 Transactions

3.4.1 Create Transaction

In the Practices List page, each Practice record has an option Create Transaction in the context menu. Clicking on it should redirect to a new web page called Create Transaction. Fields List spreadsheet has all the fields that are applicable for creating

a Transaction including the mandatory and other validations. There will be a view patient information button that should redirect user to a view patient screen as per the wireframe based on the patient selected. After filling all the fields, user can click on Search. Clicking on Cancel will navigate user back to the Practices List page.

3.4.2 Search Function

Based on the Date of Service, system should be able to find the relevant Quarter and Year. It needs to use Practice, Year, Quarter, Protocol selected, Medical Condition name or drug code or both depending on the availability for narrowing down the drug data. Clicking on Search should display two tabs Buy & Bill and Pharmacy. The excel format to display the drugs based on the input fields for Buy & Bill and Pharmacy has been agreed with the client.

3.4.3 Buy & Bill Section

Inputted drug will be the first in the list followed by the recommended drugs. Inputted drug is the one entered by the user in the transaction form. Recommended drugs are the drugs available for the same condition in the drug list. Drug list data will have all the required cost fields and other information as per the excel format agreed with the client. The same should be displayed on the screen as per the wireframe. If user has entered only medical condition name in the transaction form, then all the results will be recommended drugs and there will be no inputted drug.

3.4.4 Pharmacy Section

In the Pharmacy section, the Input drug code should be auto filled with the drug code if available in the transaction form. If user has entered only the medical condition name, then the input drug code should be a dropdown for user to select one. Primary Payment, Secondary Payment, Copay Amount, DIR Fee fields are all Price fields with no limitations, only \$ should be used and US Price format should be used. Drug Cost and Estimated Rebate should be auto filled based on the drug code selected above. Drug list data will have all the required cost fields and other

information as per the excel format agreed with the client. The same should be displayed on the screen as per the wireframe.

3.4.5 Transaction Status

Following are the transaction statuses a transaction can possibly have i.e., Open, In progress, Escalated {with comment box for remarks}, Finalized – Approved, Finalized - Not Approved, Others {with comment box for remarks}. For the comment box, we should use a text area called “Remarks” where user can enter the comments. This field is conditional and will only appear for the two statuses mentioned above. By default, the status will be Open, and user can override if required.

3.4.6 Transactions List

Clicking on Create Transaction should show a confirmation alert and after user confirmation should create a transaction and will add it to the Transactions List. Each transaction will have a unique transaction ID. Short Practice name will be used for prefixing in the auto generated transaction ID followed by a 4-digit number starting with 0001 that will be incremented. Example: In the transaction ID Apollo-0001, Apollo is the Practice short name.

Each transaction will have Update Transaction and Delete Transaction options. Transactions list page will have all the columns as per the wireframe.

3.4.7 Transactions Export to Excel

User can export Transactions data in excel format from the application. There is a button Export to Excel above the Transactions List, which should achieve this function. Export to Excel function will only download the data or the columns that is in the table by ignoring the pagination i.e., the entire records in the table should be downloaded.

3.4.8 Transactions History Log

Once a Transaction has been created and saved within the system. Any changes or modifications to the Transaction information needs to be tracked and logged in a history view. This screen should be called as History Log. This will be a grid view with the columns Timestamp, Field Name, Action (Add, Update, Delete), From, To, Username. System should consider all the transaction fields and the approved drug details for the History log.

Field Name should have the name of the field that has been modified. From and to will have the values that are existing and new respectively. Action will have update when a field is modified, it will have Add when a non-mandatory field has been filled and it will have Delete when a non-mandatory field value has been removed. Username will have the username of the user who has made the respective modification. Timestamp will log the timestamp of the action.

History Log is applicable only after the record is created. User can navigate to History Log from the Update Transaction page by clicking on the Transaction History Log button. From the History Log, clicking on the back button should redirect user back to the update transaction page.

3.4.9 Update Transaction

Update Transaction will take user to a screen similar to create transaction except that instead of create transaction, the button says Save Transaction. Update transaction screen should have transaction ID in view only state.

During the transaction update feature, user can only edit the following fields as part of an update transaction i.e., drug name, medical condition name, pharmacy user inputs i.e., the input fields in the Pharmacy section, protocol type & Provider. User cannot update Date of Service. User must complete the current transaction and create a new transaction with a new Date of Service if required.

During the transaction creation process, user will enter all the fields in the top section and will click on Search and based on the entered input data, system will pull the results. In the update transaction page, if user updates the protocol type or drug name or medical condition name and other fields in the top section, the

results section should produce the new results as per the latest input data and for this to happen user must click on search. If User doesn't click on search and clicks on save transaction, we need to give warning message stating "Search option was not performed & the latest search results will be saved by system" with options Cancel and Save. Clicking on save should update the results based on the latest input data i.e., in other words the search function should happen and save the transaction navigating user back to transactions list. If user clicks on cancel, user will be redirected back to the update transaction screen. This pop-up should only appear when user clicks on save transaction button without clicking on Search button by changing input fields.

After system searches for drug results, based on the input data there are a few cost fields that are automatically calculated based on the formula. In such values, which ever are negative values, we need to highlight in red color to indicate the loss. This is in general applicable to all the auto generated values using formulas. In the excel reports and in the application, the respective values should be highlighted in red. The format is to show the price value in braces in red font.

3.4.10 Delete Transaction

Delete Transaction should display a confirmation alert to the user and after user confirmation should delete the transaction from the system.

3.4.11 Transactions Search Filters

Above the transactions list page, there should be a custom filter option for the user to search the required transactions for a period. User can search based on the required Account#, Transaction date or Date of Service. All these 3 options should be provided in a dropdown as per the agreed wireframe. User can select any or all of these options and depending on the selection, system will show a date filter for each date where user can select a duration and click on Apply filters. For the Account#, system will display a text field for user to enter an account number. Clicking on Apply filters should apply all the selected filters and produce the results in the transactions list. The filter is a combination of all the entered values i.e., the results should satisfy all the entered filter conditions.

3.4.12 Download Detailed Report and Summary Report

As per Client there should be two types of Reports in the system for Transactions. A summary report that includes all the list of transactions or multiple transactions. A detailed report that will have details of one single transaction. The excel formats have been agreed with the client.

The approved section or relevant fields like approved drug etc. will only be available when the user selects the final recommendation drug. Until then, these fields will not be available to display in the detailed report. Therefore, depending on the status these fields should be added to the report. When the status is Finalized Approved and Finalized Not Approved, we should add these fields as only in these scenarios there will be an approved drug.

A summary report includes all the list of transactions for a certain period. The excel format has been agreed with the client. All the transactions in the list page will have a checkbox. User can select any number of records and click on Download Summary report to download a report for all the transactions. Likewise, user can select any number of records and click on Download Detailed Report, this will download the detailed report for each transaction separately and should finally zip all the files and download a zip folder for the user.

In the transaction summary report, for any transactions where Buy and Bill fields are not applicable, we should show Hyphen in the respective columns. Same is even applicable for Pharmacy related fields. This is because for a single transaction, there will be either Pharmacy or Buy & Bill option selected.

The transaction summary report should be available only in Excel. Whereas detailed report should be downloaded in both excel and PDF. User should have an option in the app to select PDF or Excel before downloading.

The cost related fields should be hidden if a respective user who doesn't have required permission download these two reports. This permission is listed in the access rights for an admin to grant for the required fields.

In the detailed transaction report or summary report, patient assistance field should have the patient assistance program name value if available i.e., if entered by the user for a patient record.

In the transaction summary report, for any transactions where Buy and Bill fields are not applicable, system should show Hyphen in the respective columns. Same is even applicable for Pharmacy related fields. This is because for a single transaction, there will be either Pharmacy or Buy & Bill option selected.

3.4.13 Final Recommendation

Final Recommendation section appears in the update transaction screen. In the final recommendation screen, user will be given a dropdown with a list of inputted and recommended drugs to select one drug code. Based on the selected drug code, drug name and all the cost fields as per the wireframe will be auto filled. Even in the decision made section, the approved drug will be auto filled the approved drug code. User can add comments if required. User can update the status and depending on the status, user can add remarks and save the transaction.

User can either opt Buy and Bill or Pharmacy as the mode of treatment. To simplify, we should provide a dropdown as per the wireframe in the update transaction where user can select only one option. Depending on the user selection, the relevant cost and other fields should be displayed on the screen as per the agreed format. And in detailed report, there will be either B&B section or Pharmacy Section.

3.5 Users and Roles

3.5.1 Users List

There is no user creation option in the application as the client suggested the user creation to happen in AWS. System should be able to pull the users list from AWS

and display in the application with the possible fields mentioned in the wireframe. On the list page, there should be a Show Active Users checkbox, clicking on it should filter the list for only active users.

3.5.2 Practice, Manager and Role Assignment

For every user in the list, there should be a Practice Assignment option in the context menu. Clicking on this should open a pop-up window where system should provide a Practice Dropdown to select Practices. This selection will be a multi-selection and there is no limit. User can even assign the same Practice to multiple users.

Example: If user has access to only 3 Practices and if user is trying to create a patient for a 4th Practice (for which he doesn't have access) using the bulk import option, system should not allow it and add an error message in the error report.

For every user in the list, there should be a Role Assignment option in the context menu. Clicking on this should open a pop-up window where system should provide a Role Dropdown to select Roles. This selection will be a multi-selection and there is no limit. User can even assign the same Role to multiple users.

For every user in the list, there should be an Assign Manager option in the context menu. Clicking on this should open a pop-up window where system should provide a User Dropdown to select a user. This selection will be a single selection and the selected user should be considered as the manager for the respective user. User can even assign the same manager to multiple users.

3.5.3 Inactive user

User can mark a user as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the user status to Inactive. Users that are inactive should not have Practice assignment option.

3.5.4 Add Role

On the Roles list screen, user will have a button Add Role. Clicking on this should redirect to a Role creation form. Wireframe has all the fields that are applicable for creating a Role including the mandatory validations.

After filling the role information, user needs to provide permissions using the Access Rights screen. The permissions list has been agreed with the client and the excel spreadsheet has the list.

After filling all the fields, user can click on Save to save a Role. Clicking on Cancel will navigate user back to the Roles List page.

3.5.5 Roles List

After a Role is saved, it will be added to the Roles List. Roles List will have the columns that are mentioned in the Roles List wireframe. Each Role record in the table will have Edit Role, Inactive options in the context menu.

3.5.6 Edit Role

Edit Role option will navigate user to the edit role screen which is similar to create screen in terms of layout. User can edit any field as required and click on save to save the details.

3.5.7 Inactive Role

User can mark a Role as Inactive by using this option. Clicking on this will show an alert to the user with a confirm action, which will change the Role status to Inactive. Roles that are inactive should not be displayed for role assignment in users list.

3.6 Dashboard

Dashboard Metrics – Client has mentioned 6 scenarios to be accommodated in the Dashboard Screen. These totals should be displayed as per the practices assigned to the user. a) Total Number of Transactions – We will show two separate cards for the list of transactions for 2 statuses i.e., Finalized - Approved and the rest of the

statuses. Clicking on these cards will redirect user to the list pages with the status filtered. b) Number of Practices that are active and should redirect user to the Practices that are active. c) Number of Active users and should redirect user to the list page of active users. d) Number of Active patients and should redirect user to the list page of active patients. e) Number of active providers. f) Number of active locations.

Wireframe for the Dashboard with the above metrics has been agreed with the client and as there is no list page for Providers and Locations, system should just display the count and make the cards on the dashboard non-clickable.

3.7 Reports

In the reports module, we have auto emailed reports and manual reports that user will download from the application.

3.7.1 Auto Emailed Reports

The following reports i.e., User Activity Report, User Performance Summary, Practice Performance Summary should be auto emailed to a list of recipients. The recipients list should be available in the web configuration file for the IT team to update if required. All the reports should be emailed on every Monday at 1:00 AM IST. The format for each report along with the filters has been agreed with the client. All the reports should be emailed in excel format.

3.7.2 Manual Reports

The following reports i.e., User Performance Detailed Report, Practice Performance Detailed Report, User Activity Report, Buy & Bill Transaction Report, Pharmacy Transaction Report should be available in the application for user to download. All the reports should be downloaded in Excel. In Reports module as per the agreed wireframe, User should be able to select a report type, select the required filters, and get the report. The report should be displayed on the screen and user should be able to download the same report by clicking on Download Excel Report button. All the report formats along with the filters has been agreed with the client.

All the reports should be generated based on the user logged in. In other words, the reports should have data of only those practices for which the logged in user has access to or assigned to.

3.8 Notifications

A list of notifications has been agreed with the client. For each notification, there will be a notification header, notification details. The event in which notification needs to be triggered has been agreed with the client. All the notifications should be read only and no redirection to the respective pages is considered. There should be a clear all option to clear all the notifications at once or each one. The design maybe slightly improvised if required when compared to the wireframe. All the notifications should be triggered based on the practices assigned to the user. In other words, if the notification is related to a practice, for the user to receive it, user must be assigned the respective practice.

4. Nonfunctional Requirements

- a) Session Timeout - Idle timeout is 15 minutes. This means if a user is logged into the application without any action for 15 minutes, system will logout the user from the Application. For last minute or two in the 15 minutes, system should a pop-up with the options continue working or logout now to the user based on the session timeout. Wireframe has been agreed with the client for the pop-up design. The session timeout value should be set in the web configuration file for now so it can be adjusted without going into the code.
- b) Date format across the application should be MM/DD/YYYY and the client agreed to this.
- c) The color scheme for the application is being followed same as Scioms website.
- d) For all the list pages, the pagination needs to be defaulted to 100. And in every view, at least 20-25 records should be accommodated.
- e) Every list page should have an option for showing and hiding columns in the table, rearranging the sequence of the columns. A wireframe has been agreed with the client for this. The changes should be saved per user until

it's changed or updated by the user again. Logout and login shouldn't impact the saved view.

- f) Every list page should also have column level filters, column level sorting and for the date, number and price fields, user should be able to filter based on conditions or operators like Equals, Greater than etc. A sample design has been shown to the client. It has been agreed with the client that the design may alter, but the functionality will be delivered in the application.
- g) All the Price field values should follow US Pricing format with a dollar sign.

For
Amendsquare Technologies Pvt Ltd
Authorized Signatory

T.S.CH.SRIKAR



Name: Sarath Bodapati
Designation: CEO
Date: 25th Mar 2024

For
SCIO Management Solutions
Authorized Signatory

Neela Rath

Name: Neela Rathi
Designation: Director of Operations
Date: 25th Mar 2024