



Project Planning Review

Group 1



Goals, Scope, and Initial Requirements

- Our main goal is to create a user-friendly medical billing system that allows patients to submit claims for insured services.
- We aim to alleviate some of the stress that comes with healthcare costs; although we have universal healthcare in Canada, there are still services that are not insured, including dental care, physiotherapy, certain surgeries, etc.



Goals, Scope, and Initial Requirements

- By the completion of the semester, we intend to have a functional prototype of our medical billing system, that allows users to interact with the platform and utilize the basic features
- Due to time constraints, our platform will not be exhaustive



Goals, Scope, and Initial Requirements

- Our initial requirements include (but are not limited to)
 - ◆ Account creation and user sign-in
 - ◆ Home page
 - ◆ Claim submission
 - ◆ Account management

Product Backlog

Product Backlog for Medical Billing platform- BillSyncEase						
ID	As a...	I want to be able to...	So that...	Priority	Sprint	Status
1	Customer	Create an account easily	So i do not have to remember many login credentials	High	1	Done
2	Customer	Access and view my billing statements online	Monitor charges and payments conveniently	High	1	Done
3	Customer	Send and view emails to insurance companies and doctors	See replies to my queries	High	1	Done
4	Customer	Easily enter and update my insurance information online	Ensure accurate billing and avoid claim denials	High	1	Done
5	Customer	Access, download and upload my bills or any important PDFs	Easily track all my records in a compiled form	High	1	Done
6	Administration	Enter patient information such as name, date of birth, and insurance details	Ensure accurate record keeping and billing processes	High	1	Work in Progress
7	Administration	Verify insurance eligibility and coverage for patients	Ensure proper billing and reimbursement	High	1	Work in Progress
8	Administration	Generate and send electronic claims to insurance companies	Expedite payment processing and reduce administrative burden	High	1	Work in Progress
9	Customer	Receive email notifications for upcoming payments	Stay informed about billing deadlines	Medium	1	Work in Progress
10	Customer	Set up automatic payment options	Simplify the payment process and avoid late fees	Medium	2	To be started
11	Administration	Track outstanding claims and follow up on unpaid invoices	Improve revenue cycle management and cash flow	Medium	2	To be started
12	Administration	Generate detailed billing reports for financial analysis	Evaluate performance and identify areas for improvement	Medium	2	To be started
13	Customer	View explanations of benefits (EOBs) online	Understand insurance coverage and billing details	Medium	2	To be started
14	Customer	Submit billing inquiries or disputes online	Resolve billing issues efficiently	High	2	To be started
15	Administration	Integrate with Electronic Health Record (EHR) systems	Streamline data entry and minimize errors	High	3	To be started
16	Administration	Receive real-time updates on claim statuses from insurance companies	Monitor claim progress and resolve issues promptly	Medium	3	To be started
17	Customer	Provide feedback on billing experiences through online surveys	Help improve billing processes and customer satisfaction	Medium	3	To be started
18	Customer	Access historical billing data and invoices online	Keep track of past payments and expenses	Medium	3	To be started
19	Customer	Access billing support resources and FAQs online	Find answers to common billing questions easily	Low	4	To be started
20	Customer	Receive personalized billing assistance from customer service representatives	Resolve complex billing issues with expert help	High	4	To be started
21	Administration	Customize billing templates for different specialties and procedures	Tailor billing processes to specific practice needs	Low	4	To be started
22	Administration	Utilize coding assistance tools for accurate code selection	Ensure compliance with coding standards and maximize reimbursement	High	4	To be started
23	Administration	Implement automated payment posting from insurance companies	Reduce manual data entry and improve efficiency	Medium	5	To be started



Project Team Setup and Roles Assignment

Product Owner: Gurkaran

- Organize product backlog
- Implement Scrum methodology

Scrum Master: Sarah

- Delegate tasks based on priority
- Oversee development stages

Developer: Aadee

- Create mockup/ prototype of app
- Work with product owner to ensure objectives of the app align with initial functionalities

UI/UX Designer: Shubhdeep, Hannah

- Make wireframes
- Gather information about insurance companies in Canada (Canada Life, UFCW..)



Wireframe

Login Page

09:52 AM

LOGO

[Large square placeholder with an 'X' inside]

Email:

[Email input field]

Password:

[Password input field]

[Forgot Password?](#)

[Create Account](#)

Account Registration

09:52 AM

LOGO

first name

[first name input field]

last name

[last name input field]

email

[email input field]

phone number

[phone number input field]

password

[password input field]

confirm password

[confirm password input field]

OR

☒ Log in Google

☒ Log in Facebook

Mockup

09:41

BillSyncEase

[Enter One](#)

Email:

email

Phone Number:

phone number

Look for my Account

Back to log in page

Login

09:41

BillSyncEase

first name

last name

email

phone number

password

confirm password →

Sign up with Google

Sign up with Facebook

Back to log in page

Account Registration

09:41

BillSyncEase

[Enter One](#)

Email:

email

Phone Number:

phone number

Look for my Account

Back to log in page

Retrieve Account

09:41

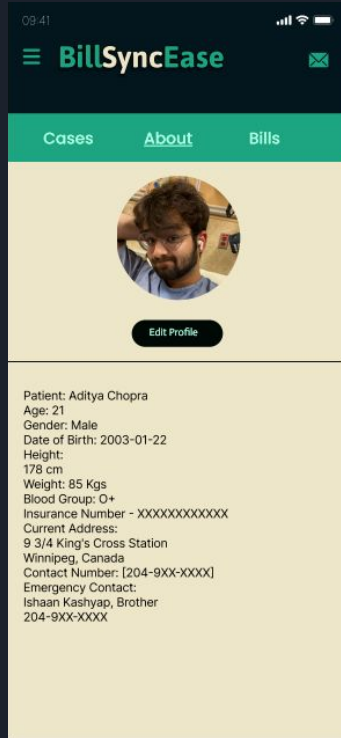
BillSyncEase

Cases About Bills

Date	Description
2015-08-20	Cervical Spine Issues
2016-04-12	Digestion Issues
2017-11-05	Heartburn
2018-09-28	Multiple Muscle Tears
2023-06-15	Fracture in Right Hand

Case Information


Mockup (2)



09:41

BillSyncEase

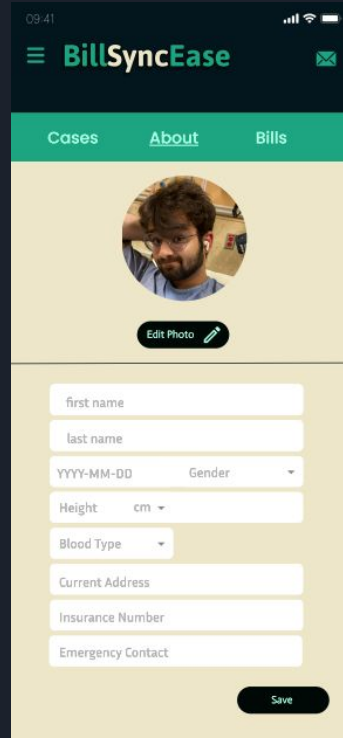
Cases About Bills



Edit Profile

Patient: Aditya Chopra
Age: 21
Gender: Male
Date of Birth: 2003-01-22
Height: 178 cm
Weight: 85 Kgs
Blood Group: O+
Insurance Number - XXXXXXXXXX
Current Address:
9 3/4 King's Cross Station
Winnipeg, Canada
Contact Number: [204-9XX-XXXX]
Emergency Contact:
Ishaan Kashyap, Brother
204-9XX-XXXX


User Information



09:41

BillSyncEase

Cases About Bills



Edit Photo

first name

last name

YYYY-MM-DD Gender

Height cm

Blood Type

Current Address

Insurance Number

Emergency Contact

Save

Update User Information



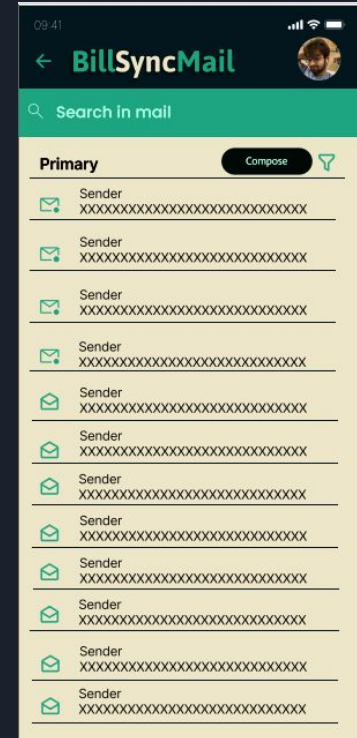
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BillSyncEase

Cases About Bills

Date	Description
	Cervical Spine Issues
	Digestion Issues
	Heartburn
	Multiple Muscle Tears
	Fracture in Right Hand

Bills Information



09:41

BillSyncMail

Search in mail

Primary Compose

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

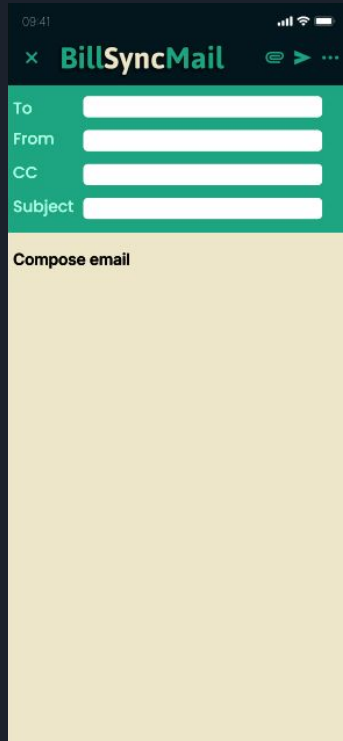
Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Sender XXXXXXXXXXXXXXXXXXXXXXXX

Mails

Mockup(3)



A mobile application mockup for 'BillSyncMail'. The interface features a dark teal header with a close button (X), the app name 'BillSyncMail' in white, and icons for email, a right arrow, and a menu. Below the header is a teal form section with labels 'To', 'From', 'CC', and 'Subject' in white, each followed by a white input field. The bottom section is a large yellow area labeled 'Compose email' in black text.

09:41

BillSyncMail

To

From

CC

Subject

Compose email

Create Email