

To make sure that you are in alignment with the requirements, please download the test cases from the resources folder.

Please check HIS/EMR maturity level by taking SAT on the SAT Playbook multiple times (downloadable from resource folder). You can submit the SAT on the portal only once, so proceed carefully, as the final results will reflect your product maturity and define the scope of testing.

Organisation: Softcure Technology Llp

Application No.: T-DH2/2024/N00033

Reference ID: DH2/2024/00033

HIS

EMR

Core

Commitment

Achievement

Excellence

SAT Maturity Level Result

Maturity Level Requirements

AAC

COP

MOM

DAC

DOM

FPM

HRM

IMS

\* PLEASE SELECT THE APPROPRIATE RESPONSE FROM THE CHECK BOX

FPM.1. THE SYSTEM PROVIDES THE ABILITY TO MANAGE THE SUPPLY CHAIN PROCESSES.

FPM 1.a. The system configures masters, workflows and rules for procurement management.

- ☒ 0: The system does not have the capability to configure workflows and rules for procurement and inventory management.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to configure workflows and rules for procurement and inventory management for only a few departments and not across all. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to configure workflows and rules for procurement and inventory management.
- ☐ NA

FPM 1.b. The system tracks the movement of stocks within the healthcare organization.

- ☒ 0: The system does not have the capability to track the movement of stocks across various departments.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to track the movement of stocks across various departments.
- ☐ NA

FPM 1.c. The system generates and manages indents.

- ☒ 0: The system does not have the capability to generate and manage indents.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to generate indents but does not manage or track them. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to generate and manage indents.
- ☐ NA

FPM 1.d. The system creates and tracks the purchase order.

- ☒ 0: The system does not have the capability to create, manage, and track purchase orders.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to create purchase orders but is not capable of managing and tracking them. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to create, manage, and track purchase orders.
- ☐ NA

FPM 1.e. The system captures the receipt of items as per the purchase order and generates receipt notes, and flag discrepancies.

- ☒ 0: The system does not have the capability to capture the receipt of items as per the purchase order and generate receipt notes or flag discrepancies.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to capture receipts as per purchase order, generate receipt notes, however does not flag any discrepancies. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.

- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to capture the receipt of items as per the purchase order, generate receipt notes and flag discrepancies, if any.
- ☐ NA

FPM 1.f. The system records feedback about the quality of purchased goods.

- ☐ 0: The system does not have the capability to record feedback about the quality of the purchased goods.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to record feedback about the quality of the purchased goods.
- ☒ NA

FPM.2. THE SYSTEM MANAGES VENDOR PAYMENTS.

FPM 2.a. The system configures rules and workflows to manage vendor invoices.

- ☒ 0: The system does not have the capability to configure rules and workflows to manage vendor invoices.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to configure rules and workflows to manage vendor invoices.
- ☐ NA

FPM 2.b. The system supports payments through multiple online/digital channels.

- ☒ 0: The system does not have the capability to make payments through online/digital channels.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to make payments through limited online / digital channels. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to make payments through multiple online/digital channels.
- ☐ NA

FPM 2.c. The system maintains a record of all payables and receivables.

- ☒ 0: The system does not have the capability to maintain records of all payables and receivables.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to maintain comprehensive digital records of all payables and receivables.
- ☐ NA

FPM 2.d. The system generates debit/credit note for suppliers.

- ☐ 0: The system does not have the capability to generate a debit/credit note for suppliers.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to generate a debit/credit note for suppliers.
- ☒ NA

FPM 2.e. The system configures individual supplier payment scheduling.

- ☐ 0: The system does not have the capability to configure individual supplier payment scheduling.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to configure individual supplier payment scheduling.
- ☒ NA

FPM 2.f. The system monitors and tracks vendor payables.

- ☒ 0: The system does not have the capability to monitor and track vendor payables.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to monitor and track vendor payables.
- ☐ NA

FPM 2.g. The system issues notifications to the suppliers regarding their payment status.

- ☐ 0: The system does not have the capability to send notifications to the vendors regarding their payment status.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to send notifications to the vendors regarding their payment status.
- ☒ NA

FPM.3. THE SYSTEM PERFORMS PATIENT BILLING FUNCTIONS.

FPM 3.a. The system configures rates for various services provided by healthcare organizations.

- ☐ 0: The system does not have the capability to configure rates for various services.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to configure rates for various services.

FPM 3.b. The system configures patient billing templates.

- ☐ 0: The system does not have the capability to configure patient billing templates.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to configure billing templates but does not generate duplicate bills with appropriate water marks. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to configure billing templates, tailored to the specific needs as well as generate duplicate bills with clearly visible water marks of duplicate status.

FPM 3.c. The system generates estimates for the care/services rendered.

- ☐ 0: The system does not have the capability to generate estimates for the care/services rendered.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to generate estimates for the care/services rendered.

FPM 3.d. The system generates patient bills as per the goods and services provided.

- ☐ 0: The system does not have the capability to generate bills considering the services rendered, goods consumed, taxes, and discounts.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to generate bills considering the services rendered, goods consumed, taxes, and discounts.

FPM 3.e. The system supports payments through various digital payment modes.

- ☐ 0: The system does not have the capability to receive payment through digital payment modes.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system supports only limited digital payment methods. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to receive payment through various digital payment modes.

FPM 3.f. The system manages the patient’s account and provides details on payment transactions and other relevant details to the patient.

- ☐ 0: The system does not have the capability to manage the patient account and provide details on payment transactions and other relevant details.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to manage the patient account and provide details on payment transactions and other relevant details.

FPM 3.g. The system has the capability to send out/receive system and workflow related triggers.

- ☒ 0: The system does not have the capability to send out/receive system and workflow related triggers.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to send out/receive system and workflow related triggers.

FPM.4. THE SYSTEM SUPPORTS INSURANCE PAYMENT FUNCTIONS.

**FPM 4.a. The system captures patients' insurance details including their eligibility and coverage.**

- ☐ 0: The system does not have the capability to verify patients' insurance details to determine their eligibility and coverage.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to verify patients' insurance details to determine their eligibility and coverage.

**FPM 4.b. The system enables easy patient authentication.**

- ☐ 0: The system does not have the capability to authenticate a patient.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to verify the KYC documents manually but not via the Digi locker. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective. The system has the capability to authenticate a patient through identification documents whether uploaded directly or via Digi locker (with the help of an OTP from the patient) that are required as a part of the initial documentation process for insurance.

**FPM 4.c. The system captures pre-authorization details from the payor for planned treatment/procedures.**

- ☐ 0: The system does not have the capability to obtain the Pre-Authorization details from the payor for planned treatment/procedures.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to obtain the Pre-Authorization details from the payor for planned treatment/procedures.

**FPM 4.d. The system captures the claim submission for the payors.**

- ☐ 0: The system does not have the capability to capture claim submissions for the payor.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to capture claim submission to the payor.

**FPM 4.e. The system checks the status of the requests.**

- ☐ 0: The system does not have the capability to check the status of the claim requests.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to check the status of the claim requests.

**FPM 4.f. The system notifies the patients about the status of their claims.**

- ☐ 0: The system does not have the capability to notify the patients about the status of their claims.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to notify the patients about the status of their claims.

**FPM 4.g. The system receives payment reconciliation communication from the payor and responds to it.**

- ☒ 0: The system does not have the capability to receive payment reconciliation communication from the payor and respond to it.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. For example (not limited to): The system has the capability to receive the payment reconciliation notice from the payor but does not allow to process and respond to the payment reconciliation notice. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to receive payment reconciliation communication from the payor and allows to respond to it.

**FPM 4.h. The system shows relevant dashboard(s) of all pre-authorization and claim status.**

- ☐ 0: The system does not have the capability to show relevant dashboard(s) of different pre-authorization and insurance claim status.
- ☐ 5: The capability has been demonstrated but there is a deviation from the requirements mentioned in the objective. A few examples of common errors are mentioned in the guidelines (non-exhaustive). If any of the common errors are experienced, a score of 5 should be given.
- ☒ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to show relevant dashboard(s) of different pre-authorization and insurance claim status.

**FPM 4.i. The system has the capability to submit health insurance claims via National Health Claims Exchange (NHCX).**

- ☒ 0: The system does not have the capability to submit health insurance claims via National Health Claims Exchange (NHCX).
- ☐ 5: The capability is present partially, however the proof/certificate is not available.

☐ 10: The system is fully compliant as per the requirements mentioned in the objective and has the capability to submit health insurance claims via National Health Claims Exchange (NHCH). The proof/certificate is available and will be submitted.