

Request Creation & Administration

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Overview

Provider Requests are crucial for us to obtain records from providers. By having Provider Requests functionality in our product, we are able to greatly streamline this process for ourselves and our users. Having Provider Request functionality in our product also increases the traceability of the data we collect.

Pathfinders, as well as internal User Admins are able to search the National Provider Identifier database for their doctor, select the years they would like us to request records for, and submit the request. The User Admin is then able to prepare authorization forms and cover letters for the request with the click of button. After the request has been sent to our Requesting Service (Currently GMS), User Admins are able to track the status of each request in our product.

The Goals of the Provider Request functionality are:

- Allow Pathfinders to add record requests themselves at any time.
- Use our product's information of pathfinders, providers, and requests to automatically create the required forms.
- Track requests in our product, including manual status update and .csv bulk import/exports.
- Improve efficiency and effectiveness in our records requesting process.
- Transition out of Salesforce.

Use Cases

Pathfinder adds a request

Pathfinder logs into their betterpath account, and clicks on the Requests tab. They then search for their provider in the NPI, and select their years of treatment.

Pathfinder cannot find a provider in the NPI

As above, except a Pathfinder is unable to locate their provider using the search. In this case they click the mailto link to email us under the search results. They provide us with the provider name and years of treatment. The User Admin who receives this email logs into betterpath, goes to that Pathfinder's requests tab and creates the request for them.

User Admin Creates Forms

User Admin logs into the system and sees that there are "new" requests in the system. The User Admin goes to the Requests list and filters on new requests. The User Admin clicks generate forms, and is asked to select the template to generate the authorization form. The form is created and ready for signing on DocuSign.

User Admin Imports/Exports CSV

A User Admin who has a request status list to import, or needs to export patients and requests list logs into betterpath. The User Admin goes to the Batch Requests tab. If the User Admin clicks import, the system will look in the SFTP for a new request status list to import. If it finds one, the system will import it and update the requests accordingly. If the User Admin would like to export the patients list and requests list they simply hit the export button and the system prepares these files and places them on the SFTP.

User Admin receives a record

When a Record is sent to us, the User Admin logs into the system and goes to the Requests List. The User Admin will search for the request id, and once found, update the status of the request to indicate that it has been received. (Or received-uploaded if appropriate)

Non-Goals/Open Issues

- This feature does not cover the Pathfinder signing their authorization forms. For now Pathfinders will have to do this in DocuSign.


Screen Specification

Pathfinder searches for provider

The screenshot shows a web application interface with a dark top bar containing icons for 'Share your Recap', a printer, a user profile, and a power button. Below this is a navigation menu with tabs: Home, Clinical Summary, Timeline, Treatments, Hospitalizations, Procedures, Labs, Records, and Record Requests. A timeline at the top shows years from 2001 to 2015, with a red dot on 2014 and a dropdown for 'months' or 'years'.

The main content area is divided into two columns. The left column, titled 'Request Records from a Provider', includes a search form with a 'Find a Provider' section. This section has a 'Provider name' input field, radio buttons for 'Individual (e.g. doctor)' and 'Institution (e.g. hospital)', a 'City' input field, and a 'State' dropdown menu. A blue 'Search' button is at the bottom. The right column is titled 'Current Record Requests' and lists a request for 'Lloyd Austin' (2003 - Present) with a status of 'Requested' and an update date of 'Dec 3, 2015'. Below this is a 'Past Records Requests' section listing three requests: 'George Kuntz' (1998 - Present, Received, Updated Dec 4, 2015), 'Carol Bilinski' (2003 - Present, Received - Uploaded, Updated Dec 3, 2015), and 'Sandy Rhody' (2003 - Present, Received, Updated Dec 3, 2015).

Pathfinder views search results

 Find a Provider

☒ Individual (e.g. doctor)

☐ Institution (e.g. hospital)

Refine

Clear

JOHN SMITH

260 STATE ST, HAMBURG, PA, 19526

JOHN SMITH

Pathfinder selects years of treatment

Request Records from a Provider

Providers can include doctors, clinics, hospitals, pharmacies or complementary and alternative specialists.

JOHN SMITH
260 STATE ST, HAMBURG, PA,
19526

npi: 1760426167
tel: 6105624548
fax: 6105621358

Years of treatment

to

User Admin clicks Generate Auth Form

The screenshot shows the 'Requests' tab in the User Admin interface. The user 'adamSF salesforce' (BP-000-000-1) is selected. The 'Preparing Forms' dropdown is open, showing the 'Preparing Forms' option. The 'Generate Auth Form' button is visible in the bottom right corner.

Home Users Leads Requests Add User Batch Requests

Filter Requests by Preparing Forms and/or Status Group Notes Filter

Close supplemental information

000050
adamSF salesforce
BP-000-000-1
1904-04-05

LORIE PICCOLI
NPI: 1669665642
1001 S GEORGE ST, YORK, PA, 17403
Phone: 7178512450
Fax: 7178513469
1200 - 3333

Preparing Forms

Generate Auth Form

User Admin selects template to use for Auth Form

The screenshot shows the 'Requests' tab in the User Admin interface. The user 'adamSF salesforce' (BP-000-000-1) is selected. The 'Preparing Forms' dropdown is open, showing the 'Preparing Forms' option. The 'Generate Auth Form' button is visible in the bottom right corner. A dropdown menu is open, showing a list of templates to select from.

Home Users Leads Requests Add User Batch Requests

Filter Requests by Preparing Forms and/or Status Group Notes Filter

Close supplemental information

000050
adamSF salesforce
BP-000-000-1
1904-04-05

LORIE PICCOLI
NPI: 1669665642
1001 S GEORGE ST, YORK, PA, 17403
Phone: 7178512450
Fax: 7178513469
1200 - 3333

Preparing Forms

Select...

- 1508050386 - University of Chicago Hospitals
- 1518140326 - Southern Illinois University Health Services
- 1528197720 - Geisinger Medical Center

User Admin Manually Updates Request

The screenshot shows the 'Requests' tab in a user admin interface. The top navigation bar includes 'Home', 'Users', 'Leads', and 'Requests'. The 'Requests' tab is active, and the sub-tab 'Preparing Forms' is selected. The page displays a request for 'LORIE PICCOLI' with the following details:

- Request ID: 000050
- Requester: adamSF salesforce
- BP: 000-000-1
- Date: 1904-04-05
- NPI: 1669665642
- Address: 1001 S GEORGE ST, YORK, PA, 17403
- Phone: 7178512450
- Fax: 7178513469
- Zip: 1200 - 3333

A dropdown menu is open for 'Preparing Forms', showing the following options:

- Preparing Forms
- Preparing Hand Form
- Preparing Provider Specific Form
- Waiting for hand signature
- Waiting for e-signature

User Admin Imports/Exports CSVs

The screenshot shows the 'Requests' tab in a user admin interface. The page is divided into two main sections: 'Import Request Status List' and 'Export Patients and Request Statuses'.

Import Request Status List

- Import Record Requests Status List
- Failed (Dec 7, 2015 at 4:39pm)
- Failed (Dec 7, 2015 at 4:39pm)
- Success: Status_12-06-2015_001.csv (Imported Dec 7, 2015 at 4:39pm - 1 record requests updated)

Export Patients and Request Statuses

- Export Record Requests List And Patients List
- Success: Requests_12-07-2015.csv (Exported Dec 7, 2015 at 4:41pm)
- Success: Patients_12-07-2015.csv (Exported Dec 7, 2015 at 4:41pm)
- Success: Requests_12-07-2015.csv (Exported Dec 7, 2015 at 4:13pm)