Request Creation & Administration

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User Admin clicks Generate Auth Form

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User Admin Imports/Exports CSVs

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

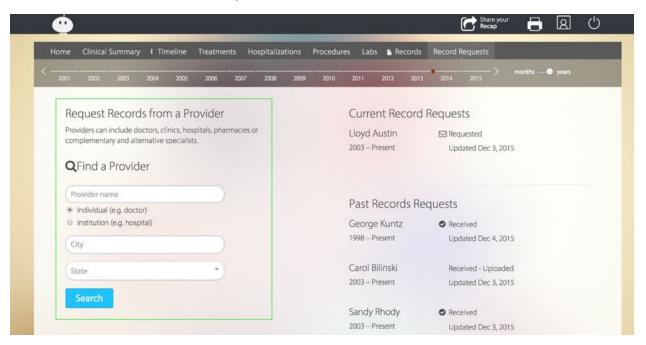
When a Record is sent to us, the User Admin logs into the system and goes to the Requests List. The User Admin will search for the request id, and once found, update the status of the request to indicate that it has been received. (Or received-uploaded if appropriate)

Non-Goals/Open Issues

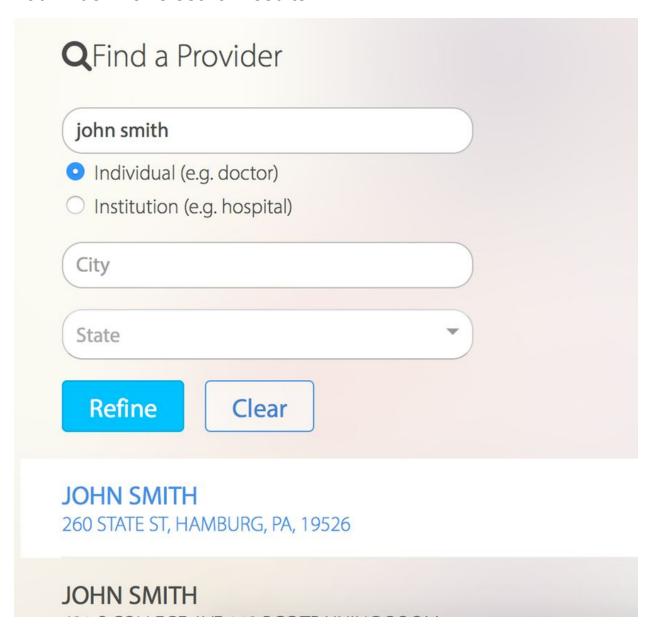
 This feature does not cover the Pathfinder signing their authorization forms. For now Pathfinders will have to do this in Docusign.

Screen Specification

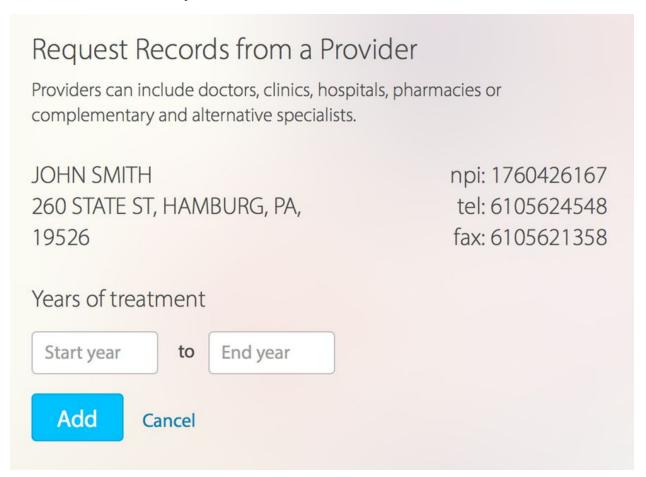
Pathfinder searches for provider



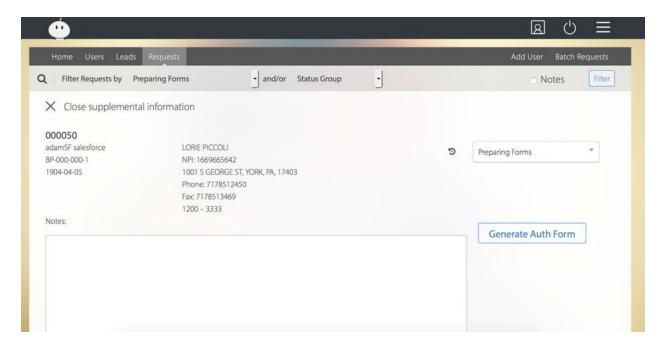
Pathfinder views search results



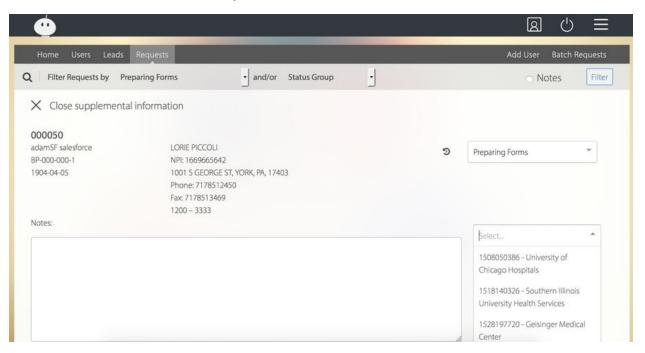
Pathfinder selects years of treatment



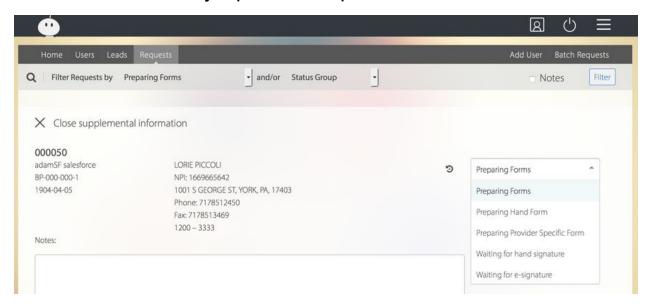
User Admin clicks Generate Auth Form



User Admin selects template to use for Auth Form



User Admin Manually Updates Request



User Admin Imports/Exports CSVs

