



# Client Meeting

January 25, 2013

## **Current System**

- Request Management System
  - Requests come in from the public as well as health-care professionals (primarily from those in BC, but it is open worldwide)
    - Caller does not have to be patient
  - Requests come in by phone or email
  - A team of 3-4 Drug info specialists take down request as well as demographic info, contact info, Patient ID, etc (more in detail later)
    - Specialists then take down information, research the request, reply with answer
    - Requests are also tagged with and searched keywords
    - The request and answer is referenced, logged, and stored in database for easy access when similar info is requested again (becomes a repository)
      - References are by URL, file in current system, or free text field
    - Time stamped for length needed to complete request
    - Requests are either in progress or completed
    - Requests get answered usually the same way they are requested
- Examples: Can I take drug X while I'm taking drug Y? What dosage of drug X should I give to patient with this medical history?

## **Inefficiencies of Current System**

- High learning curve for current Microsoft Access database
- Inefficient search
  - Free text field using word, comma, word, comma, etc
  - One word can be spelled differently
  - Essentially using CTRL-F; looks for the keywords in all fields
  - Users having to go through each record manually
- No security

## **What do they want in the New System?**

- **Keep from Old System:**
  - Fields, given as a dropdown
  - ~4000 starter keywords
  - Import all current requests and answers
- **New Features:**
  - Auto-complete free text fields when typing keywords
  - Google-like search algorithm
  - Security Features: different access levels, audits, reports, graphs
  - Show 5-10 most recent incomplete requests at start page
  - Requests are never deleted, only in an active or inactive state
  - Requests can be linked with another request
  - When a person is editing a request, that request is locked from other users
  - View/Edit must be logged
  - Help Page

## **Users**

Can be viewed as roles and each user can be assigned different roles

Users can also be assigned 1...\* groups

- Viewer:
  - view only completed requests

- Every viewers can view all information, including client information
- DI Specialist:
  - view, create and modify requests; view reports
- Reporting User:
  - generate, view reports
- Administrator/God:
  - add/remove users
    - change admin settings/members
    - view history log (who viewed/changed the requests in DB)
    - create/delete users
      - to create user needs, First & Last name, User ID, and email address
- Add more groups
- Able to see locked requests

### **Security:**

Passwords must be changed every 42 days

- 8+ characters
- One number, one capital letter, one special character
- Cannot use previous six passwords
- Users are locked out if password not changed in time

Time-out of 30 min

Single Sign On using AD

### **UI: (Use BCAA Colours)**

### **Request/Ticket:**

- Opened or Closed
  - Can still be edited when closed, editor logged and audited
  - Closed Requests cannot be reopened
- At least one reference
  - If reference is URL or file path, it needs to be opened in new tab or window when clicked
- Would be nice to have suggested keywords based on question

### **Response:**

- WYSIWIG/Plain Text
- Have BCAA header at top
- Exported to word, Not PDF

### **Dashboard:**

- Shows open requests first, then completed requests
  - Each request should show:
    - Request ID
    - Date Started
    - Status
    - Caller name
    - Keywords
- Sort by column feature

## **Reports**

- View Data such as Total Requests, total time spend on requests, average time spend per request, turnaround time
- Given a request ID, show all people who have read/edited it
- Compare by month, by quarter, fiscal year start to current, single months between years
- In current system, time is entered manually
- Produced as tables as well as histograms
- Dynamic reports? Use any fields, graph on ad-hoc basis

## **Fields:**

### **Required:**

- Request # (Auto-Generated)
- Date (Auto-Generated)
- Requester Type (Patient/Doctor)
- Caller Last Name
- Caller First Name
- Caller Email or phone (at least 1)(Phone number can be auto-formatted)
  - Phone may be just a six digit extension
- Geographic location (Dropdown Lookup Table)
- Caller Type (Dropdown Lookup Table)
- Tumor Group (Dropdown Lookup Table)
- Question Type (Dropdown Lookup Table)
- Question
  - Each question should be added with time-stamp
- Answer (built-in template)
- Timestamps for open and close
- State
- Special Notes
- Pharmacist (based on user that is logged in at the time)
- Keywords (0...\*) (auto and auto-add new keywords to existing keywords)
- Severity
- Probability
- Impact Scoring (Dropdown, Automatically selected from Severity and Probability)
- References
- Linked Requests
- Request Started By (name and user id)
- Request Closed By (name and user id)

### **Not Required:**

#### Any Patient Info

- First and Last Name
- Agency ID
- Gender
- Age

**Standards/Requirements:**

- Project must be completed using ASP.net 3.5+
- Hosted on Windows Server 2008
- Microsoft SQL
- C#
- Compatible with IE 7 and Chrome