**Noble to Soarian Call Status Update**

**Version 1.1**

**Prepared By: Lois Whitley & Levy Lazarre**

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# **Document Control**

## Resources

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## Project Distribution List

## Document Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Modifier** | **Description** |
| V1.0 | 1/11/2017 | Lois Whitley | Originally Created |
| V1.1 | 1/16/2017 | Levy Lazarre | Revised and Completed |
|  |  |  |  |
|  |  |  |  |

# 1. Introduction

## 1.1 Purpose

This document will outline the interface between Noble and Soarian including: means of transmission, inbound data format, outbound data format, data transformation and business logic.

## 1.2 Project Scope

BayCare supplies a daily file to Noble to work SBO BC PT Collection accounts. Noble auto dials out and leaves a message to patients with a balance under $1,000.00 and creates a work list for accounts with a balance over $1,000.00. The process is as follows:

1. BC sends daily data element file to Noble (no interface required for this outbound file to Noble).
2. Noble updates their database
   1. Auto dials for pt account less than $1,000.
   2. Work list created if pt account is over $1,000
3. Noble agent documents the status of call.
4. At the end of the day (6 p.m.) 2 files of all activity for the day along with status entered in Noble Systems sent back to Soarian
   1. Exclude file (people Noble doesn’t call)
   2. Call History file (OB calls that Noble calls and updates status on)
5. BC receives the files and converts them to XML. The XML File gets interfaced with coded comments into Soarian.
6. BC sends a new file to Noble - Process repeats

## 1.3 Terminology Standards

### 1.3.1 Acronyms

**RGBP** – receivable group combined with billing period

### 1.3.2 Glossary

**RGBPstatus** – will become comment code that goes into Soarian

**Reference Date** – date comment posted (not load date in this file)

## 1.4 Document References

Click here to enter text.

# *2.* Diagram

# 3. Requirements

## 3.1 Functional Requirements

|  |  |  |
| --- | --- | --- |
| **Cloverleaf** |  |  |
| **Number** | **Requirement Name** | **Requirement Description** |
| FR.2016.2.0 | Inbound record | Parse new line terminated, pipe delimited text file |
| FR.2016.2.1 | Outbound record | Create custom XML comment output for each record in input file |
| FR.2016.2.2 | Process input on demand | Cloverleaf will sweep the inbound directory every 120 seconds to see if there is anything to process. |
| FR.2016.2.3  FR.2016.2.4 | Discard header record  Translate Noble status codes  to Soarian Comment codes | Noble includes a header line in the input files. Cloverleaf must discard that header and only process the data lines.  Noble sends receivable groups status codes that must be translated to Soarian comment codes via a crosswalk table in Cloverleaf. |

## 3.2 Non-Functional Requirements

Provide concise detail for the below non-functional requirements. The below requirements must be evaluated for every project.

|  |  |  |
| --- | --- | --- |
| **Cloverleaf** |  |  |
| **Number** | **Requirement Name** | **Requirement Description** |
| NFR.2016.2.0 | Click here to enter text. | Click here to enter text. |

## 3.3 Messaging Protocols

Below are listed the details for the messaging protocols that will be leveraged for this integration.

### 3.3.1 Inbound to the BayCare Cloverleaf from Vendor

* New line delimited Batch files FTP to Cloverleaf by Midrange Team
* IB directory: /sites/ftp\_data\_in/noble/excludes
* IB directory: /sites/ftp\_data/in/noble/call\_history

### 3.3.2 Outbound from the BayCare Cloverleaf to Vendor

* XML via TCP Socket Connection to Soarian
* Production Connection
* IP: 64.46.218.224
* Port: 10112
* Test Connection
* IP: 64.46.236.180
* Port: 10112

# 4. Message Formatting

## 4.1 Messaging Format

Each inbound record is terminated by a new line with a pipe “|” separating each field.

### 4.1.1 Inbound Fields in Order

Exclude File:

**rowid|rgbp|areacode|phone|rgbpstatus|load\_date**

Call History File:

**rowid|seqno|call\_type|lm\_rowid|cb\_rowid|listid|appl|lm\_filler1|lm\_filler2|lm\_filler3|lm\_filler4|act\_date|act\_time|areacode|phone|tsr|info|country\_id|time\_connect|time\_acw|addi\_status|status|time\_hold|d\_record\_id|d\_device\_id|caller\_ani|caller\_name|phone\_type|phone\_descr|grp|compliance**

### 4.1.2 XML Schema

<?xml version="1.0" encoding="UTF-8"?>

<!-- W3C Schema generated by XMLSpy v2014 rel. 2 sp1 (http://www.altova.com) -->

<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema">

<xs:element name="generalComment">

<xs:complexType>

<xs:sequence>

<xs:element name="commentRequest" maxOccurs="unbounded">

<xs:complexType>

<xs:sequence maxOccurs="unbounded">

<xs:element name="source">

<xs:complexType>

<xs:sequence>

<xs:element name="sourceSystemName" type="xs:string" minOccurs="0"/>

<xs:element name="referenceIdentifier" type="xs:string" minOccurs="0"/>

<xs:element name="referenceDate" type="xs:string" minOccurs="0"/>

<xs:element name="referenceTime" type="xs:string" minOccurs="0"/>

<xs:element name="referenceUserIdentifier" type="xs:string" minOccurs="0"/>

</xs:sequence>

</xs:complexType>

</xs:element>

<xs:element name="target">

<xs:complexType>

<xs:sequence>

<xs:element name="identifier" type="xs:string" minOccurs="0"/>

<xs:element name="type" type="xs:string" minOccurs="0"/>

</xs:sequence>

</xs:complexType>

</xs:element>

<xs:element name="comment">

<xs:complexType>

<xs:sequence>

<xs:element name="code" type="xs:string" minOccurs="0"/>

<xs:element name="Text" type="xs:string" minOccurs="0"/>

</xs:sequence>

</xs:complexType>

</xs:element>

</xs:sequence>

</xs:complexType>

</xs:element>

</xs:sequence>

</xs:complexType>

</xs:element>

</xs:schema>

### 4.1*.*3 Cloverleaf Configuration Files

* VRL noble\_exclude.vrl
* VRL noble\_call\_history.vrl
* Translate noble\_soarf\_comment\_exclude.xlt
* Translate noble\_soarf\_comment\_call\_history.xlt
* Table noble\_soarf\_statuscodes.tbl
* TCL tps\_drop\_header.tcl
* XML Schema soarf\_codedComment.xsd

### 4.1.4 Cloverleaf Site Location

soarf\_comment\_21\_p

## 4.2 Outbound XML Data Transformation Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **Field Description** | **Required Y/N** | **Data Type** | **Notes** |
| Source System Name | Y | String | Defaulted to “Noble System” |
| Reference Identifier | Y | String | Defaulted to “CodedComments” |
| Reference Date | Y | String | Current Date Standard |
| Reference Time | Y | String | Current Time |
| Reference User Identifier | Y | String | Defaulted to “Noble” |
| Identifier | Y | String | Pulled by scripting from the **rgbp** input field in the exclude file or the **lm\_filler2** input field in the call\_history file |
| Type | Y | String | Defaulted to “RcvGrp” (Receivable Group) |
| Code | Y | String | Noble status translated to Soarian comment code via crosswalk table. The input field is **rgbpstatus** in the exclude file. In the call\_history file, the **status** field must be concatenated to the **addi\_status** field in order to get the complete Noble status |
| Comment Text | Y | String | Pulled from crosswalk table as above |

## 4.3 Sample Messages

### 4.3.1 Inbound Flat File

Call History File:

rowid|seqno|call\_type|lm\_rowid|cb\_rowid|listid|appl|lm\_filler1|lm\_filler2|lm\_filler3|lm\_filler4|act\_date|act\_time|areacode|phone|tsr|info|country\_id|time\_connect|time\_acw|addi\_status|status|time\_hold|d\_record\_id|d\_device\_id|caller\_ani|caller\_name|phone\_type|phone\_descr|grp|compliance

62017|62017|1|1|0|1999|BHSO|60339580|1004701001|5|0|12/13/2016|83049|813|9660153||A|1|0|0||A|0|71835|1|8632806034|Baycare Health Systems|0|NO-ALT|1|1

62018|62018|1|2|0|1999|BHSO|101931291|1005851001|6|0|12/13/2016|83102|727|7384242||A|1|0|0||A|0|71836|1|8632806034|Baycare Health Systems|0|NO-ALT|1|1

62019|62019|1|4|0|1999|BHSO|70426574|1013182001|14|0|12/13/2016|83139|813|7201892||A|1|0|0||A|0|71837|1|8632806034|Baycare Health Systems|0|NO-ALT|1|1

62020|62020|1|8|0|1999|BHSO|100379256|1019576004|22|0|12/13/2016|83210|727|2153501||A|1|0|0||A|0|71838|1|8632806034|Baycare Health Systems|0|NO-ALT|1|1

Exclude File:

rowid|rgbp|areacode|phone|rgbpstatus|load\_date

640|2154590001|727|7546210|DCWN|11/17/2016

rgbp = receivable group

billing period

rgbpstatus = NSstatus bp

reference date = date comment posted (not load date in this file)

if status is blank= a warning message is sent as comment text so that the users can be aware and investigate

### 4.3.2 Outbound XML File

<commentRequest>

<source>

<sourceSystemName>Noble System</sourceSystemName>

<referenceIdentifier>CodedComments</referenceIdentifier>

<referenceDate>2017/01/16</referenceDate>

<referenceTime>10:12:00.000000</referenceTime>

<referenceUserIdentifier>Noble</referenceUserIdentifier>

</source>

<target>

<identifier>2506334</identifier>

<type>RcvGrp</type>

</target>

<comment>

<code>NSA</code>

<Text>Noble System Use Only LEFT MESSAGE ON ANSWERING MACHINE</Text>

</comment>

</commentRequest>

| Crosswalk Table for Status Codes | | |
| --- | --- | --- |
| Noble Status Code | Baycare Comment Code |  |
| A | NSA | Noble System Use Only LEFT MESSAGE ON ANSWERING MACHINE |
| B | NSB | Noble System Use Only LINE BUSY |
| BIAU | NSBIAU | Noble System Use Only AUDIT REQUEST OF CHGS |
| BICO | NSBICO | Noble System Use Only CODING REVIEW |
| BIGU | NSBIGU | Noble System Use Only TX PAY FROM GUR UNALLOCATED |
| BIIB | NSBIIB | Noble System Use Only ITEM BILL REQUESTED |
| BIMI | NSBIMI | Noble System Use Only MISC COMMENTS |
| BIMR | NSBIMR | Noble System Use Only MEDICAL RECORDS REQUESTED |
| BIRE | NSBIRE | Noble System Use Only REBILL REQUEST |
| BIRF | NSBIRF | Noble System Use Only REQ REFUND FROM CBO |
| BIRP | NSBIRP | Noble System Use Only INS CO TO REPROCESS CLAIM |
| BITX | NSBITX | Noble System Use Only REQ TO CBO TX PAY FROM OTHER RG W CREDIT |
| CB1D | NSCB1D | Noble System Use Only CALL BACK 1 DAY |
| CB1W | NSCB1W | Noble System Use Only CALL BACK 1 WEEK |
| CB2W | NSCB2W | Noble System Use Only CALL BACK 2 WEEK |
| CB5D | NSCB5D | Noble System Use Only CALL BACK 5 DAYS |
| D | NSD | Noble System Use Only CALL DISCONNECTED |
| DCCP | NSDCCP | Noble System Use Only DO NOT CALL CELL PHONE OPT OUT |
| DCWN | NSDCWN | Noble System Use Only DO NOT CALL WRONG NUMBER |
| FX | NSFX | Noble System Use Only FAX NUMBER |
| HD | NSHD | Noble System Use Only HOLD DROP |
| MC | NSMC | Noble System Use Only MESSAGE COMPLETE |
| MD | NSMD | Noble System Use Only MESSAGE DROP |
| MS | NSMS | Noble System Use Only MESSAGE LEFT |
| MS1W | NSMS1W | Noble System Use Only INBOUND CALL RETURN 7 DAYS |
| MS2W | NSMS2W | Noble System Use Only INBOUND CALL RETURN 14 DAYS |
| MSEA | NSMSEA | Noble System Use Only LEFT MESSAGE ENGLISH AGENT |
| MSEB | NSMSEB | Noble System Use Only LEFT MESSAGE ENGLISH BLAST |
| MSSA | NSMSSA | Noble System Use Only LEFT MESSAGE SPANISH AGENT |
| MSSB | NSMSSB | Noble System Use Only LEFT MESSAGE SPANISH BLAST |
| N | NSN | Noble System Use Only NO ANSWER |
| PP1W | NSPP1W | Noble System Use Only PROMISE TO PAY 1 WEEK |
| PP2W | NSPP2W | Noble System Use Only PROMISE TO PAY 2 WEEK |
| PPCC | NSPPCC | Noble System Use Only PROMISE TO PAY CREDIT CARD |
| PPCK | NSPPCK | Noble System Use Only PROMISE TO PAY CHECK |
| PPPF | NSPPPF | Noble System Use Only PROMISE TO PAID IN FULL |
| RAAL | NSRAAL | Noble System Use Only REFER TO AUTO LEGAL TEAM |
| RABK | NSRABK | Noble System Use Only REFER TO BANKRUPTCY |
| RADE | NSRADE | Noble System Use Only REFER PATIENT DECEASED |
| RAFA | NSRAFA | Noble System Use Only REFER FIN ASSISTANCE |
| RAGC | NSRAGC | Noble System Use Only REFER TO GULF COAOS |
| RAMM | NSRAMM | Noble System Use Only REFER MEDMAX |
| RAOT | NSRAOT | Noble System Use Only OTHER COMMENTS |
| RARM | NSRARM | Noble System Use Only ARM |
| RAWC | NSRAWC | Noble System Use Only WORKERS COMP |
| RPCO | NSRPCO | Noble System Use Only REFUSE TO PAY COB INSURANCE |
| RPDS | NSRPDS | Noble System Use Only REFUSE TO PAY DISPUTE |
| RPPB | NSRPPB | Noble System Use Only PATIENT BALANCE |
| TRMG | NSTRMG | Noble System Use Only TRANSFER MGR ESCALATION |
| TRPY | NSTRPY | Noble System Use Only TRANSFER PAYMENT |
| LMEN | NSLMEN | Noble System Use only LEFT MESSAGE ENGLISH |
| LMSP | NSLMSP | Noble System Use only LEFT MESSAGE SPANISH |
| D1 | NSD1 | Noble System Use only DISCONNECTED UNASSIGNED NUMBER |
| NCD | NSNCD | Noble System Use only NO ANSWER CANCEL DIAL |
| MCAM | NSMCAM | Noble System Use only MESSAGE COMPLETE ANSWERING MACHINE |
| MDAM | NSMDAM | Noble System Use only MESSAGE DROPPED ANSWERING MACHINE |

# **5. Testing**

## 5.1. Unit Testing Scenarios

|  |  |
| --- | --- |
| **Scenario** | **Expected Result** |
| Parse Inbound File | Each field should be parsed correctly without error |
| Xlate | Xlate should transform the IB record into XML without error |
|  |  |

## 5.2 Integrated Testing Scenarios

|  |  |
| --- | --- |
| **Scenario** | **Expected Result** |
| Validate Output in Soarian | Should post without error in Soarian and be visible to the end user |
|  |  |

## 5.3 Testing Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| **Testing Phase** | **Date** | **Department** | **Team Member** |
| PH1.UNIT | 01/04/2017 | CBO | Nancy Knoop |
| PH1.INTEGRATED |  |  |  |

### 

## 5.4 Piloting

List the facilities and associated networks in scope for pilot testing.

* End of document