Fix-the-Phones CRM Requirements Excerpt –

Repository Requirements

1. **Requirements for Delivery in July 2015**

| **Business Need (BN)** | | **OWNR**  **Number** | | **Owner Requirement (OWNR)** | **Date Needed** | **Service Provider** |
| --- | --- | --- | --- | --- | --- | --- |
| **BN 3:  Consolidated Views of Veteran Information**  Provide the ability for the call agent to automatically viewinformation from a single desktop view. | | | | | |  |
| 3.1 | |  | | Provide the ability for the call agent to automatically view the following demographic information about the Veteran in a single desktop view as a snapshot: |  |  |
|  | | 3.1.7 | | MyHealtheVet (MHV) Information  Status of Veteran Authentication in MHV | July 2015 | MHV |
|  | | 3.1.8 | | MyHealtheVet (MHV) Information  Status of Veteran Opt-In to MHV secure messaging | July 2015 | MHV |
|  | 3.1.11 | | | Information indicating Service connected disabilities and Special Treatment Authority conditions, e.g., Combat Veteran, Agent Orange | July 2015 | Pathways  (returns AO etc data on ExamRequest responses) |
|  | 3.1.13 | | | Power of attorney/durable power of attorney information | July 2015 | ?? |
|  | 3.1.15 | | | Active Release of Information (ROI) forms  Active Release of Information (ROI) forms to include a list of the providers/agencies, dates ROI is active, if information has been sent the date it was sent/received | July 2015 | Enhanced CDS |
|  | 3.1.16 | | | Patient record flags | July 2015 | Record flags are there on patient records – can enhance CDS to provide this if so desired |
|  | 3.1.20 | | | MHV secure messaging assignment | July 2015 | MHV |
| 3.3 |  | | | Appointment Scheduling > View  Provide the ability for the call agent to automatically view the following appointment/scheduling information in a single desktop view: | July 2015 |  |
|  | 3.3.1 | | | Appointment Scheduling > View  Future appointments | July 2015 | Pathways |
|  | 3.3.2 | | | Appointment Scheduling > View  Last PCP appointment | July 2015 | Pathways |
|  | 3.3.6 | | | Transportation Services Info  Veteran has a cognitive, speech, and/or hearing impairment. | July 2015 | Enhanced CDS |
|  | 3.3.7 | | | Transportation Services Info  Date, time and reason of most recent urgent care visit | July 2015 | Enhanced CDS |
|  | 3.3.8 | | | Emergency Visit Info  Date, time and reason of most recent emergency visit. | July 2015 | Enhanced CDS |
|  | 3.3.9 | | | Inpatient Discharge Info  Date, time and reason of most recent inpatient discharge. | July 2015 | Enhanced CDS |
|  | 3.3.10 | | | Clinically Indicated Date  Date on which next visit should be scheduled | July 2015 | ?? |
| 3.5 |  | | | Provide the ability for the call agent to view the following other information in a single desktop view: |  |  |
|  | 3.5.13 | | | Postings/special messages (such as advance directives, clinical warnings, restricted/sensitive records warning, etc.). | July 2015 | Enhanced CDS |
| **BN 6:  Call Notes**  Provide the ability for the call agent to document information about the call using the single desktop view. | | | | | |  |
| 6.2 |  | | Provide the ability for the call agent to document call messages and have option to either push messages into CPRS or keep in CRM as a workflow item (task to be assigned). | |  |  |
|  | 6.2.2 | | Call messages>  Suspend  Provide the ability for the call agent to “suspend” (not sign-off on) clinical call messages pushed to CPRS. | | July 2015 | ?? |