**User Story Number:** US116 (USIN-035)

**User Story Name:** Populate HL7 with Subscriber’s DOB Field

**Product Backlog ID:** 68

**Backlog Priority:** Not Defined

**Author:** eInsurance

# Background

Insurance eligibility requests always use the patient date of birth (DOB) from registration when the patient is the subscriber. Subsequent auto-update also compares the DOB provided by the insurer (on the 271 response) with this Patient file date. If these dates do not match, a patient insurance file will never auto-update (because insurance personnel cannot change the registration record) and often return rejected responses as payer cannot locate patient.

This creates a problem verifying a patient record when a Veteran may have given inaccurate information to the military about their DOB. VA always uses the Veteran’s DOB as provided on military records in the registration file. It is not always the most accurate DOB, especially when it comes to Medicare enrollment. Medicare often has a different DOB than VA, and if a successful response cannot be obtained, the buffer entry never auto-updates.

We want the ability to use the DOB as entered into the Patient Insurance Sub-File to be transmitted on the 270 inquiry instead. We have modified “Subscriber Name” to behave in this way and want DOB behavior to match.

* There is no change to or dependency on the Insurance Capture Buffer (ICB) application, which will continue to use existing fields.
* There is no requirement for additional fields to be populated for entry clerks (Company, Subscriber ID and/or DOB).
* There is no change to the behavior of the Subscriber Update (SU) action (path = Patient Insurance [PI], View Policy [VP]).

# Story

As an insurance verifier, I want the 270 inquiry to read the DOB from the Patient Insurance Sub-File so that eligibility inquiries will be sent with this subscriber DOB and the subsequent 271 response can be returned (and auto-update occur) successfully.

# Conversation

This change involves the PID segment and, when the patient relationship to insured is not “self,” the GT1 segment. No change to HL7 message but changing the data used to populate the DOB field for subscriber.

# Current Functionality

* For Appointment Extract:
  + If patient relationship to insured = self then populate **subscriber** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03).
  + If patient relationship to insured ≠ self then populate **patient** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03) and **subscriber** DOB in GT1 segment from Patient Insurance Sub-File INSURED DOB (#2.312,3.01).
* For Buffer Extract (real time inquiry):
  + If patient relationship to insured = self then populate **subscriber** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03).
  + If patient relationship to insured ≠ self then populate **patient** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03) and **subscriber** DOB in GT1 segment from the buffer’s INSURED DOB (#355.33,60.08)
* For Electronic Inquiry (on demand, functionally equivalent to Appointment Extract):
  + If patient relationship to insured = self then populate **subscriber** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03).
  + If patient relationship to insured ≠ self then populate **patient** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03) and **subscriber** DOB in GT1 segment from Patient Insurance Sub-File INSURED DOB (#2.312,3.01).

# Future Functionality

* For Appointment Extract:
  + If patient relationship to insured = self then populate **subscriber** DOB in PID segment from Patient Insurance Sub-File INSURED DOB (#2.312,3.01).
    - If patient relationship to insured = self and Patient Insurance Sub-file INSURED DOB 2,.312,301 is blank, then populate **subscriber** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03).
  + *Note: current functionality; do not change*) If patient relationship to insured ≠ self then populate **patient** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03) and **subscriber** DOB in GT1 segment from Patient Insurance Sub-File INSURED DOB (#2.312,3.01).
* For Buffer Extract (real time inquiry):
  + If patient relationship to insured = self then populate **subscriber** DOB in PID segment from buffer’s INSURED DOB (#355.33,60.08).
    - If patient relationship to insured = self and buffer’s INSURED DOB (#355.33,60.08) is blank, then populate **subscriber** DOB in PID segment from Patient Insurance Sub-File INSURED DOB (#2.312,3.01).
      * If patient relationship to insured = self and both buffer’s INSURED DOB (#355.33,60.08) and Patient Insurance Sub-File INSURED DOB (#2.312,3.01) are blank, then populate **subscriber** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03).
  + *Note: current functionality; do not change*) If patient relationship to insured ≠ self then populate **patient** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03) and populate **subscriber** DOB in GT1 segment from buffer’s INSURED DOB (#355.33,60.08).
* For Electronic Inquiry (on demand, functionally equivalent to Appointment Extract):
  + If patient relationship to insured = self then populate **subscriber** DOB in PID segment from Patient Insurance Sub-File INSURED DOB (#2.312,3.01).
    - If patient relationship to insured = self and Patient Insurance Sub-file INSURED DOB (#2.312,301) is blank, then populate **subscriber** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03).
  + *Note: current functionality; do not change*) If patient relationship to insured ≠ self then populate **patient** DOB in PID segment from Patient file DATE OF BIRTH (#2,.03) and **subscriber** DOB in GT1 segment from Patient Insurance Sub-File INSURED DOB (#2.312,3.01).

*Developer note:* Checked the inbound filing of DOB from Payer (to rule out the potential requirement to change the comparison fields from auto-update code). Result of check per Development Lead is that auto-update behavior does not need to be modified.

# Detailed Listing of Acceptance Criteria

| Requirement ID | Description | External Dependency (Y/N) |
| --- | --- | --- |
| USIN-035.01 | For Appointment Extract:  Eligibility Inquiry for insured as self populates **subscriber** DOB in PID segment using Patient insurance Sub-File INSURED DOB (#2.312,301) if available; else populates using Patient file DATE OF BIRTH (#2,.03). | N |
| USIN-035.02 | For Appointment Extract:  (Existing Functionality) Eligibility Inquiry for insured not self populates **patient** DOB in PID segment using Patient file DATE OF BIRTH (#2,.03) and **subscriber** DOB in GT1 segment using Patient Insurance Sub-File INSURED DOB (#2.312,3.01). | N |
| USIN-035.03 | For Buffer Extract:  Eligibility Inquiry for insured as self populates **subscriber** DOB in PID segment using buffer’s INSURED DOB (#355.33,60.08) if available; else populates **subscriber** DOB using Patient Insurance Sub-File INSURED DOB (#2.312,3.01), if available; else populates **subscriber** DOB using Patient File DATE OF BIRTH, (#2,.03). | N |
| USIN-035.04 | For Buffer Extract:  (Existing Functionality) Eligibility Inquiry for insured not self populates **patient** DOB in PID segment using Patient file DATE OF BIRTH (#2,.03) and populates **subscriber** DOB in GT1 segment using buffer’s INSURED DOB (#355.33,60.08). | N |
| USIN-035.05 | For Electronic Inquiry:  Eligibility Inquiry for insured as self populates **subscriber** DOB in PID segment using Patient insurance Sub-File INSURED DOB (#2.312,301) if available; else populates using Patient file DATE OF BIRTH (#2,.03). | N |
| USIN-035.06 | For Electronic Inquiry:  Eligibility Inquiry for insured not self populates **patient** DOB in PID segment using Patient file DATE OF BIRTH (#2,.03) and **subscriber** DOB in GT1 segment using Patient Insurance Sub-File INSURED DOB (#2.312,3.01). | N |

# Testing Notes:

* Test with different values for patient relationship to insured.
* Test with different date of birth scenarios:
  + Patient file (registration) DATE OF BIRTH (#2,.03) matches Patient Insurance Sub-File INSURED DOB (#2.312,3.01).
  + Patient file (registration) DATE OF BIRTH (#2,.03) does not match Patient Insurance Sub‑File INSURED DOB (#2.312,3.01).
  + Insurance Sub-File INSURED DOB (#2.312,3.01) is (populated/blank).
  + Buffer’s INSURED DOB (#355.33,60.08) is (populated/blank).
* Test using Appointment Extract and Buffer Extract and Electronic Inquiry.
* Test using a Subscriber with DOB different from Patient DOB.
* Need FSC to assist with testing by monitoring the HL7 messages they receive.
* Review all three of Appointment Extract, Buffer Extract, and Electronic Insurance Inquiry and verify that all match requirements.
* Review existing functionality for populating Name of Subscriber (name of insured). Existing Name of Subscriber behavior should match the proposed solution for DOB.

# Risks

* Continuing to send only non-editable DOB will continue to produce eligibility transaction rejects that will prevent auto-update.

# Assumptions:

* None defined.

# Approval Signatures

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**Revision History**

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 10/13/2016 | v0.01 | Original | eInsurance |
| 08/02/2017 | V0.02 | Revision | eInsurance |