**User Story Number:** USIN-4

**User Story Name:** Add Patient Policy Comments to TPJI Billing Number Entry

**Priority:** (High, Medium, Low) Medium

**Rational ID: 3**

**Initial Sizing Estimate:**

**Backlog Item: 67**

**Service Request Number:**

**Author:** Crystal Pryor and MCCF eInsurance Team

# Background

# Users need the ability to view patient policy comments while they are in Third Party Joint Inquiry (TPJI) for all entry points

# Functionality exists when using patient name

# But when enter TPJI with bill number (AKA claim number), this option is not available

# Story

As a user who can access TPJI, I want to see patient policy comments no matter which entry option I use, so that my workflow is more efficient.

# Conversation

The TPJI functionality was created to pull together billing, insurance, accounts receivable and utilization review information to ease flow of information. We want consistent functionality for ease of use. This software upgrade will assist in the flow of information.

Screenshots below

Existing functionality using claim number on entry:

Enter BILL NUMBER or PATIENT NAME: KXXXXXX

REIMBURSABLE INS. PRNT/TX

**Claim Information** Aug 29, 2016@11:05:47 Page: 1 of 4

KXXXXXX

Insurance Demographics

Bill Payer: MEDICAL MUTUAL OF OHIO

Claim Address: PO BOX 6018

CLEVELAND, OH 441011018

Claim Phone: 888-636-3621

Subscriber Demographics

Group Number: XXXXXXXXXXXXXXXXX

Group Name: INDIVIDUAL

Subscriber ID: XXXXXXXXXXXXXXXXX

Employer:

Insured's Name:

Relationship: PATIENT

+ |% EEOB | Enter ?? for more actions|

BC Bill Charges AR Account Profile VI Insurance Company

DX Bill Diagnosis CM Comment History VP Policy

PR Bill Procedures IR Insurance Reviews AB Annual Benefits

CB Change Bill HS Health Summary EL Patient Eligibility

ED EDI Status AL Go to Active List EB Expand Benefits

RX ECME Information EP ERA/835 EX Exit

Select Action: Next Screen// vp Policy

Carrier Subscriber ID Group #

--------------------------------------------------------------------

Primary: MEDICARE (WNR) XXXXXXXXXXXX PART B

Secondary: MEDICAL MUTUAL OF OHIO XXXXXXXXXXXX

Select Policy: (P/S): P// Primary.....................

Updates Requested to this option:

**Patient Policy Information** Aug 29, 2016@11:05:56 Page: 1 of 8

For: XXXXXXXXXXXXXXXXX Primary

MEDICARE (WNR) Insurance Company \*\* Plan Currently Active \*\*

Insurance Company

Company: MEDICARE (WNR)

Street: PO BOX 660159

City/State: DALLAS, TX 75266

Billing Ph: 800-633-4227

Precert Ph: 800-633-4227

Plan Information

Is Group Plan: YES

Group Name: PART B

Group Number: PART B

BIN:

PCN:

+ Enter ?? for more actions

BC Bill Charges AR Account Profile VI Insurance Company

DX Bill Diagnosis CM Comment History VP Policy

PR Bill Procedures IR Insurance Reviews AB Annual Benefits

CI Go to Claim Screen HS Health Summary EL Patient Eligibility

AL Go to Active List PT Policy Comment EX Exit

Select Action: Next Screen//PT\*

\*This user story applies to the adding the blue highlighted functionality.

A user would like to get the Patient Policy Comment screen when he/she selects the Action PT and desires that the appropriate sub-functions – EE – Expand Entry, SL – Search List and EX – Exit - work as they currently do when a user selects PT from TPJI launched from user name entry.

Screenshot below:

so: EE + select a line item is supposed to display that comment to display the following fields:

**Last Edited Date:**                                                
**Last Edited By:**                                                     
**Contact Person:**                                                                 
**Contact Phone #:**                                                                 
**Method:**                                                                 
**Call Reference #:**                                                                 
**Authorization #:**

**Comment**

# Detailed Listing of Acceptance Criteria

|  |  |  |
| --- | --- | --- |
| Requirement ID | Description | External Dependency  (Y/N)  If Y, provide organization and description |
| USIN-4.01 | Assure that if TPJI entered by patient name allows entry of PT – Patient Policy Comments. | N |
| USIN-4.02 | Assure that PT is an action to select when using TPJI entered by bill number. | N |
| USIN-4.03 | Assure that PT truly shows the patient policy comments when using TPJI with entry of bill number – with the appropriate next options (options EE, SL and EX) and that all of them work as expected. | N |

# Testing notes:

* Compare TPJI using *Name* and *Bill Number* to compare screen displays – two comment screens should match.
* Recommendation to Tester:
  + Launch TPJI - enter name of patient with insurance (Test Patient was used so no PII concerns)

BI Claims Tracking Menu for Billing ...

BILL Enter/Edit Billing Information

CATC Automated Means Test Billing Menu ...

EDI EDI Menu For Electronic Bills ...

ERX Generate ECME Rx Bills

LTC LTC Billing Menu ...

OUTP Patient Billing Reports Menu ...

TPB Third Party Billing Menu ...

TPJI Third Party Joint Inquiry

Select Billing Clerk's Menu <TEST ACCOUNT> Option: TPJI

List of Patients Active Bills is displayed – Make note of one of the billing numbers

**Third Party Active Bills** Oct 11, 2016@14:35:34 Page: 1 of 3

IB,PATIENT 37 IXXXX NSC, VA PENSION

Bill # From To MT? Type Stat Rate Insurer Orig Amt Curr Amt

1 %K101XXX 10/14/15 10/14/15 NO O/I N REIM IN +AETNA U 574.07 574.07

2 K101XXX 10/15/15 10/15/15 NO O/P N REIM IN +CIGNA 71.72 71.72

3 K101XXX 10/12/15 10/14/15 NO O/P N REIM IN +CIGNA 30.63 30.63

4 K101XXX 10/20/15 10/20/15 NO O/I N REIM IN +AETNA U 131.15 131.15

5 K101XXX 10/21/15 10/21/15 NO O/ N WORKERS US DEPT 194.55 194.55

6 K101XXX 10/27/15 10/27/15 NO O/I N REIM IN CIGNA 433.37 433.37

7 K101XXX 10/27/15 10/27/15 NO O/P BI REIM IN +MEDICAR 0.00 0.00

8 K101XXX 10/28/15 10/28/15 NO I/I BI REIM IN +MEDICAR 0.00 0.00

9 K101XXX 10/29/15 10/29/15 NO O/I N REIM IN AETNA U 604.74 604.74

10 K101XXX 11/16/15 11/16/15 NO O/I BI REIM IN +MEDICAR 0.00 0.00

11 K101XXX 10/01/15 10/01/15 NO O/P N REIM IN +CIGNA 15.00 15.00

12 K101XXX 12/16/15 12/16/15 NO O/I BI REIM IN +MEDICAR 0.00 0.00

13 K101XXX 10/05/15 10/05/15 NO O/P N REIM IN +AETNA U 10.00 10.00

14 K101XXX 01/05/16 01/05/16 NO O/I N TORT +AETNA U 297.73 297.73

15 K101XXX 01/19/16 01/19/16 NO O/P BI REIM IN +MEDICAR 0.00 0.00

16 K101XXX 02/03/16 02/03/16 NO O/P BI REIM IN +MEDICAR 0.00 0.00

17 K101XXX 02/04/16 02/04/16 NO O/P BI REIM IN +MEDICAR 0.00 0.00

+ |r Referred|\* MT on Hold |+ Multi Carriers|% EEOB|

CI Claim Information IL Inactive Bills PI Patient Insurance

CP Change Patient HS Health Summary EL Patient Eligibility

Select Action: Next Screen//

* Select PI – Patient Insurance.
* Select VP – View Policy.
* Pick an Active Policy – Make note of which policy you select.
* Select PT – Patient Policy Comments.
* Take screenshot.

View Patient Policy Comments Aug 30, 2016@16:14:04 Page: 1 of 1

Policy Comment History for: IB,PATIENT 37 XX-XX-XXXX XX/XX/XXXX

MEDICAL MUTUAL OF OH Insurance Company \*\* Plan Currently Active \*\*

DT Entered Entered By Method Person Contacted

-----------------------------------------------------------------------------

\*\*\* No Comments To Display \*\*\*

Enter ?? for More Actions

EE Expand Entry SL Search List EX Exit

Select Action: Quit//

* Exit back to Main Menu.
* Launch TPJI again, type in the Bill number you noted above.

**Claim Information** Oct 11, 2016@16:11:09 Page: 1 of 4

%K101XXX IB,PATIENT 37 IXXXX DOB: XX/XX/XX Subsc ID: WXXXXXXX

Insurance Demographics

Bill Payer: AETNA US HEALTHCARE

Claim Address: PO BOX 2559

FT WAYNE, IN 468012559

Claim Phone: 800/523-7978

Subscriber Demographics

Group Number: GROUP NUM 8802

Group Name: FLAD

Subscriber ID: W13141516

Employer: TEST AUTO SHOPPE

Insured's Name: IB,PATIENT A JR

Relationship: PATIENT

+ |% EEOB | Enter ?? for more actions|

BC Bill Charges AR Account Profile VI Insurance Company

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CB Change Bill HS Health Summary EL Patient Eligibility

ED EDI Status AL Go to Active List EB Expand Benefits

RX ECME Information EX Exit

Select Action: Next Screen//

* Select VP – Policy.
* System will display Primary, Secondary and Tertiary Payers or however many payers are on the claim.
* Pick the Payer that matches the Policy you noted above.
* This is where you should now be able to enter PT.

# Constraints

Patient Policy Comments need Patient, Bill number and Payer for comparison.

# Assumptions

1. The Patient Policy Comment screen is the same whether viewed by patient name or bill number.
2. Documentation related to screens will be updated as part of this User Story.

# Risk

Users will not be able to see the newly formatted Patient Policy Comments when using TPJI when entering a bill number.

# Approval Signatures

|  |
| --- |
|  |

**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 08/30/2016 | v0.01 | Original | Julie Mann, Leidos |
| 10/11/2016 | V0.02 | Added risk | A. Weymouth |
| 10/11/2016 | V0.03 | Removed PHI & clarified wording | M. Simons |
| 10/24/2016 | V1 | Final version for submission | Leidos Team |