**User Story Number:** USEB-500

**User Story Name:** Cloning a Primary Claim

**Product Backlog ID:** n/a

**Backlog Priority:** 4.5

**Initial Sizing Estimate:** 8

**Rational ID:** (to be added later)

**Rally ID:** US114

**Author:** M. Simons Analyst

# Background

The following requirement from Patch IB\*2\*547 was not fully met and it was decided that it would be fixed in the next development effort:

#### 2.6.11.1 Functional Requirement: Copy and Cancel – COB Data

The IB system shall automatically copy the prior Coordination of Benefits (COB) payment data from previous payers to the new claim when users cancel and copy a claim in the following situations:

* Copy Primary commercial with EOB to Primary – primary COB/no copy
* Copy Secondary commercial claim with EOB to Secondary – primary and secondary COB/copy primary
* Copy Secondary commercial claim with no EOB to Secondary – primary COB/no secondary COB/copy primary
* Copy Primary Medicare with EOB to Primary – primary COB/no copy
* Copy Secondary Medicare claim with EOB to Secondary – primary and secondary COB/copy primary
* Copy Secondary Medicare claim with no EOB to Secondary – primary COB/no secondary COB/copy primary

The highlighted bullets were not implemented.

# Story

As a billing clerk, I want to be able to Cancel and Copy a primary claim if necessary. If the claim has an MRA or EOB associated with it, I do not want the Coordination of Benefits (COB) data, specifically the reimbursement rate (MOA1 – Piece 3), copied to the new primary claim.

# Conversation

The option Copy and Cancel [IB COPY AND CANCEL], cancels the bill associated with the bill number entered by the user. It also creates a new bill, with a new bill number. If the original bill is a primary claim (destination payer is the primary payer) and it has one or more associated Medicare-equivalent Remittance Advice (MRA) or Explanation of Benefits (EOB), then the new primary claim will NOT copy the COB data from the MRA/EOB to the new primary claim.

**Detailed Listing of Acceptance Criteria**

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| --- | --- | --- |
| Requirement ID | Description | External Dependency  (Y/N)  If Y, provide organization and description |
| EB1.1.1 | Users can use the option Copy and Cancel [IB COPY AND CANCEL] to cancel a primary claim and create a new primary claim which is to be submitted as a replacement claim. | N |
| EB1.1.2 | If the primary claim (Medicare or non-Medicare) has one or more associated MRAs or EOBs in VistA, the system will not copy the COB data to the new primary claim except for COB1, Piece 7 - Other Payer Claim Control Number (ICN). The ICN is required for replacement claims. | N |
| EB1.1.3 | User can transmit the new primary claim and there will be no COB data except the COB1, Piece 7 - ICN. The MOA1, MIA1, MIA2, CCAS, LCOB and LCAS records will not exist in the outbound transaction. | N |

# Constraints

The software associated with this User Story must be completed either prior to or at the same time as TAS eBill Printing of CMS 1500.

# Risks

If this software is not developed, the sites will continue to receive payer rejections caused by the presence of COB data in primary claims such as adjustment claims.

# Approval Signatures

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**Revision History**

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 11/1/2016 | v0.01 | Original / Initial | M. Simons |
| 11/2/2016 | v0.02 | Final version following elaboration session | M. Simons |
| 11/4/2016 | v1.0 | Updated following Tech Writer review | M. Simons |